



# Cloud Contact Center

Agent with Omni Desktop  
Introduction Guide

Course: SGMWCCAD001  
November 2020

# Agenda



- Webex Contact Center (WxCC) Service Architecture (Brief)
- Agent Training
  - URL / Logging in
  - Navigating The Desktop
  - Agent States
  - Receiving calls
  - Other functions
    - Placing Callers On Hold
    - Using the Consulting Feature
    - Warm and Blind Transferring
    - Conferencing
  - Wrap-Up
  - Making Outbound Calls
  - Other
    - Errors
    - Help
  - Omni Channel Support - Email and Chat
  - Review Operational Features
  - Questions

2

Confidential

©2020 Masergy. All rights reserved.

Here are the topics we will be covering today:

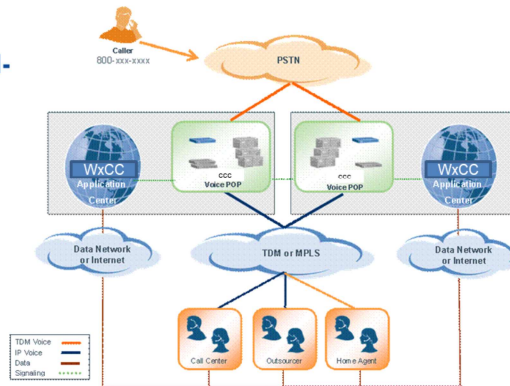
- First I will provide a high level overview of the service architecture. Not with the intent of making you experts on the service design however understanding some of the basics will allow you to be better prepared for the service experience.
- Second the login process is reviewed.
- Then navigating the client desktop or console
- We then review the process to receiving and managing calls including using calling features: Hold, Consulting, Transfer and Conferencing
- And the call Wrap-up process
- Next is making Outgoing calls through the Contact Center
- Error notification and on-line help
- We then review other forms of communications. Omni-channel / Multichannel support
- Finally we complete by review important procedures and features to remember
- And any additional questions

# What is Cisco Webex Cloud Contact Center?

Webex Contact Center (WxCC) is a virtual ACD located in the Cloud



- ❖ Contact Center provides “mid-point” call control
- ❖ Call Treatment is provided to Caller leg
- ❖ Join together two call legs
  - Caller leg
  - Agent leg



3

Confidential

©2020 Masergy. All rights reserved.

The Webex Contact Center is a cloud-based service that operates a little different than your traditional premise or hosted-based call-center. There are two distinct parts to the contact experience, barely perceptible but very useful. The service operates in the mid-point between the Caller and the Agent. With this design there is a "Caller" leg and an "Agent" leg to the communications path.

When the caller makes contact with the Contact Center they are first provided with IVR treatment, messaging/announcements and perhaps a menu of options to choose from. When it is necessary to connect with an Agent, the service will first call the agent to make sure that a connection can be established to the available agent and notify the agent that a caller will be presented. The agent's communication device will ring or alert them to the incoming call. The agent will answer the call using their communication device be it a desk phone or softphone, etc. in the same manner in which they would answer any call. Once answered / accepted, then the desktop will present the Contact Center call controls to be used to manage the interaction.

**Launching the Desktop Step 1**

MASERGY

- HTML Agent Applet Portal URL
  - <https://agent.cjp.cisco.com/ada-ws/home> **Bookmark this URL**

**Cisco Webex**

Enter your email address

Email address

Next

**Enter Login Id and Password Provided**

**Cisco Webex**

Hello scotttest5@mytestaccounts.com,

Password

Sign In

Forgot password?

Confidential

©2020 Masergy. All rights reserved.

Now we will take a look at launching the desktop.

In the initial setup process the Agent/User will first receive an invitation message to “Join” the Contact Center service. Once you have clicked the embedded link in the message you will receive a temporary access code. When used the first time you will be prompted to enter a new Password and save it.

Launching the desktop client or console is a two-step process.

In Step 1, the agent will login to the service using their internet browser to the web address provided to them by their system administrator. It should be noted that you must make sure that you bookmark the URL provided and not the site that you might be redirected to when logging into the service. The service will redirect you automatically to the active web-server for that session. This redirected web-link can change from time-to-time due to server availability, maintenance, location, etc.

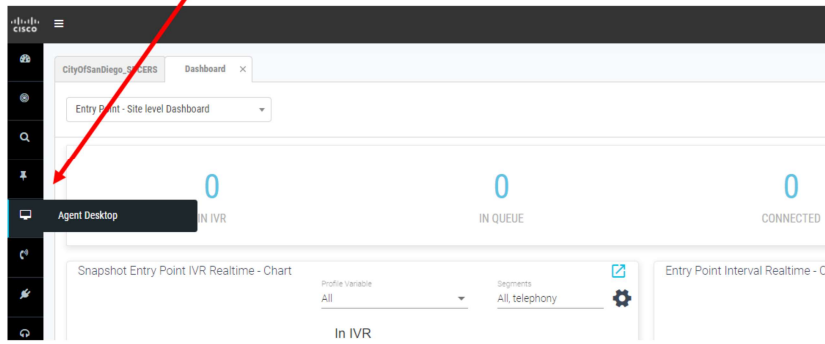
You will then enter your login email and password and proceed to Step 2.

Note: Your email will typically be your work email address. The Password will be the result of your creating the Password from your initial service invitation and the Password you then created.

# Initial Deployment of Desktop



If Admin Click on Agent Desktop Icon



5

Confidential

©2020 Masergy. All rights reserved.

For Supervisors and System Administrators who may need to Login as Agents you will have a Desktop Icon to select when you need to take or make calls through the Contact Center.

## 2<sup>nd</sup> Step to Logging In

A screenshot of the MASERGY user interface showing a 'Submit Dial Number and Team' form. The form is centered on a light blue background. It contains a text input field for 'DN' with the value '1234567890'. Below this is a radio button selection for 'US Format' (selected) and 'Other'. Underneath is a dropdown menu for 'TEAM' with 'MemberServices' selected. A blue 'Save Changes' button is located at the bottom right of the form. The background shows a sidebar with navigation icons and a 'My Channels' section with 'No history to show'.

6

Confidential

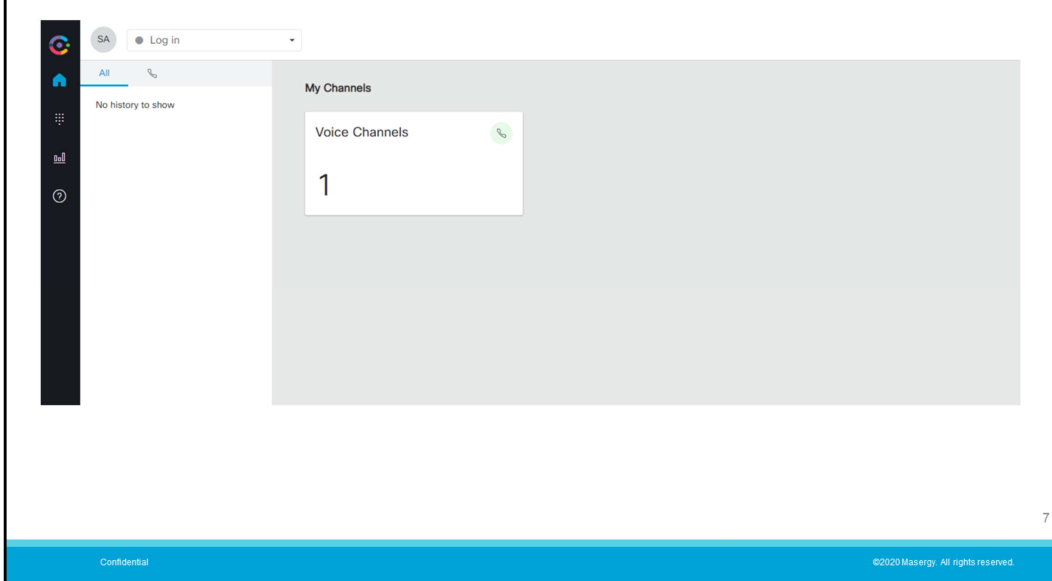
©2020 Masergy. All rights reserved.

Step 2 of the login process requires you to enter the phone number where you can be reached to take or make calls. This may be simply your DID number. If you do not already know your DID this will be assigned to you by your system Administrator. The phone number entered needs to be the full ten digit number including area code. Using the digit 1 is optional.

- Enter the number with no dots, dashes or spaces.
- Choose US format. Only choose other if outside of the North American dialing plan.
- Select the Team you wish to participate in during this login session. You can only participate in one Team during your logged-in session. If you are a Member of multiple Teams you must choose only one from the drop-down menu. In most cases you will only be a member of one team and that will already be filled in and the only choice.
- Then click Save Changes.

Note: If the Agent needs to participate in a different team you will need to first Logout and then Log back in and select that team.

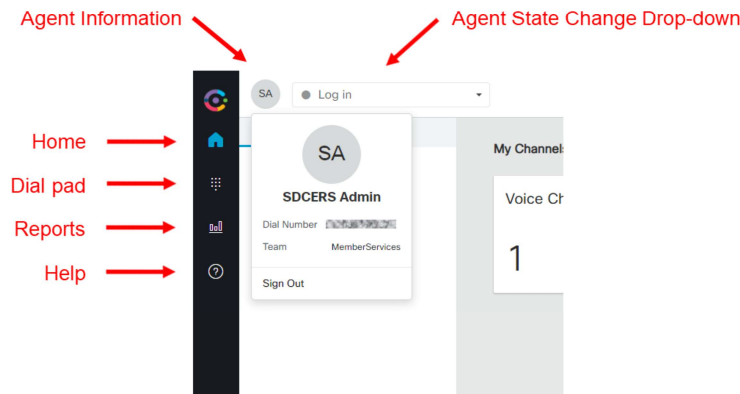
# Agent Logged In



You are now logged into the service however you are in an “Idle” state. You have not yet made yourself available to take calls.

This allows you time to prepare before taking incoming calls or communications through the contact center.

## Navigating The Login Screen



8

Confidential

©2020 Masergy. All rights reserved.

Now that you are logged in lets first take a look at the Navigational tools.

- At the Top left a round two-lettered Symbol Icon represents the you, the Agent and are logged-in. Example shows "SA". This would likely be the initials of your name. Clicking on this will bring up your information and "Sign-Out" bar.
- The Agent State Change Drop-down menu is offered. This gives you to change your status allowing you to change from a "Log-In" idle state to "Available" or choose some other "Idle" state from the drop-down. We will cover the "Available" state in a moment.
- The "Home" icon will bring you back to this "Main" screen.
- The "Dial-pad" or "Key-pad" will be used to make outgoing calls through the Contact Center.
- The "Reports" icon will allow you to access your own Agent reports capability.
- The "Help" icon provides access to an on-line Help Guide.



# Agent States



## Agent Availability States

When you log in to the Agent Desktop, the system places you in a default Idle state. In order to be placed in a routing queue so you can accept contacts, you must place yourself in the Available state. If you need to go offline for a meeting, training, or your lunch break, you can place yourself in an Idle state. No contacts are routed to you when you are in an Idle state.

| Agent State    | Description  |
|----------------|--|
| Available      | You are ready to accept and respond to contacts. After you log in, you must select <b>Available</b> in the STATUS NOW drop-down list to receive routed contact requests.   |
| Any Idle state | You are logged in but not ready to accept contact requests. By default, you are placed in an Idle state when the Agent Desktop opens. Your CC-One administrator can configure additional Idle states that are appropriate for your enterprise. Therefore, you may see selections such as Lunch Break, Training, or Meeting in the drop down list that are not mentioned in this online Help.<br><br>If you need to go offline during your work day, you can manually select an Idle state. In addition, you can select an Idle state while you are interacting with a customer, and you will be placed in that Idle state when the call or chat session ends or when you send or close the current email message. If you have questions regarding which Idle state to select, consult your supervisor. |

| Agent State     | Description   |
|-----------------|---|
| Ringing         | A new voice contact card is in your Active Contact List in the left panel of the Agent Desktop awaiting your acceptance. If you don't accept the call within the time period configured by your CC-One administrator, the call returns to the queue and is assigned to the next available agent.  |
| Connected       | You have accepted the voice contact card and are connected to a caller. When the connection is made, a timer starts in the contact card indicating how long you have been connected. Information related to the call is displayed in the center panel of the Agent Desktop, and information about the caller is displayed in the right panel. |
| NotResponding   | The phone rang but was not answered within the time period configured by your CC-One administrator. The call is returned to the queue. A message appears on your desktop that presents you with the option to either to take the next call or go into an Idle state. Select one of the options.   |
| Call On Hold    | You have placed the call on Line 1 on hold.   |
| ConsultReserved | While you were in the Connected state, another person requested a consultation with you.  |
| Consulting      | You are consulting with another person such as another agent at your enterprise. A timer shows the amount of time you have been consulting with the person.   |
| Conferencing    | You are conferencing with a customer and an agent.  |
| OutdialReserved | You have initiated an outdial call. Information related to the call is displayed in the center panel.   |
| Wrap Up         | The call has ended. You are prompted to enter Wrap Up codes before taking another call. See <a href="#">Wrapping Up Voice Communications</a> .<br>While in the Wrap Up state, you cannot receive a routed or transferred contact card.  |

Confidential

©2020 Masergy. All rights reserved.

Before reviewing the process for interaction with clients let's first review in summary the various "States" that an agent may perform or find themselves in.

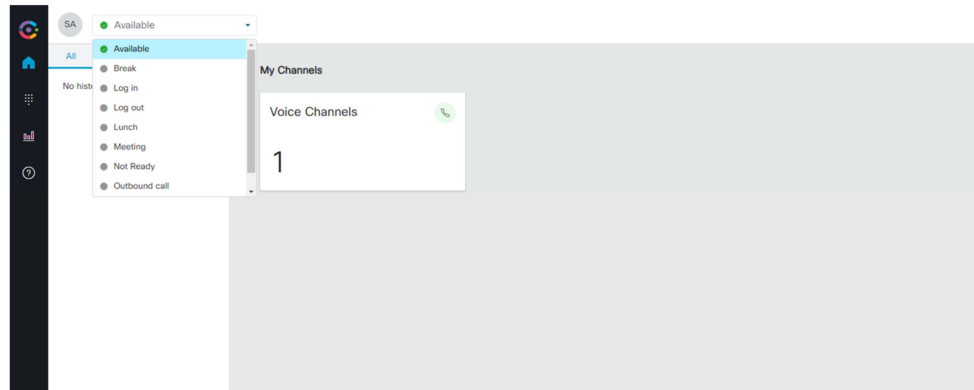
- Available – You the Agent is ready to accept calls or client communications through the Contact Center. You must put yourself in the "Available" state to take calls or messages.
- Idle State – In general any "Idle" state will allow you, the agent, to stop taking communications from the Call Center". The appropriate "Idle" selection or code will be chosen for the circumstance. The "Idle" codes presented in the drop-down list are customized to your needs. Idle codes can be modified or added by your system administrator.
- Ringing – Any incoming Call being presented to you the Agent. You will be given a certain amount of time to answer the call. As an Agent your communication device or softphone will ring and you will answer the call as you would for any incoming call.
- Connected – Once you have answered the call you will then be connected with the caller. You are now in the "Connected" state.
- NotResponding – A Not Responding message may be presented in the event that a call was presented and not answered within the specified time. The Call was therefore "Bounced Back" to the queue. Other error messages may result if there are communications issues such as lack of internet connectivity.
- Hold – Placing the Caller on hold. This state will be shown during the call when you have placed a contact on hold.
- ConsultReserved – While connected with a caller another Agent attempted to "Consult" with you.

- Consulting – This feature is used to consult with another agent or supervisor during a call. This state will be shown during the call.
- Conferencing – This feature is used to establish a 3-party call. This state will be shown during the call.
- OutdialReserved – You the Agent has initiated and outgoing call through the Contact Center.
- Wrap Up” – Once the communication has ended you the Agent are prompted to select a “Wrap-up Code” (sometimes referred to as a “Reason Code”) to define what the call may have pertained to. Wrap-up codes are predefined when the system is designed but can be modified by the system administrator.

## Go “Available” to Receive Calls



- Agent is placed in 'Idle' State upon Log-in
- Change status to 'Available' to receive calls
- Calls can ONLY be received while in status of 'Available'



10

Confidential

©2020 Masergy. All rights reserved.

Before placing yourself in the “Available” state to begin taking calls or messaging you can use this time to prepare to make sure any necessary databases, CRM or order entry support applications are open and available.

Once placing yourself in the “Available” state you can begin to take incoming calls and messaging through the contact center.

To stop taking calls or messaging you would use the same menu to choose an appropriate “Idle” state. You can choose an “idle” state even while on a current call. In this way you would prevent your self from the possibility of immediately getting another call after completion with a current call.

# Receiving an Incoming Call



The Contact Center Service Calls Your DN First  
You are in the "Ringing State"

Caller & Routing Details

**CURRENT STATUS**  
Ringing

**SESSION DETAILS**

|                    |                                  |
|--------------------|----------------------------------|
| Phone Number:      | [REDACTED]                       |
| DNIS:              | [REDACTED]                       |
| Virtual Team Name: | Masergy_Queue_Test_1             |
| Ivr Path:          | 1 EOI                            |
| Path Id:           | StartCall Selection1 out out out |
| Account Number:    | [REDACTED]                       |
| Customer:          | Bill_Sullivan                    |
| Email Address:     | bsullivan@[REDACTED].com         |
| Queue/Ivr Path:    | EOI                              |
| Queue Path Id:     | [REDACTED]                       |
| VIP:               | YES                              |

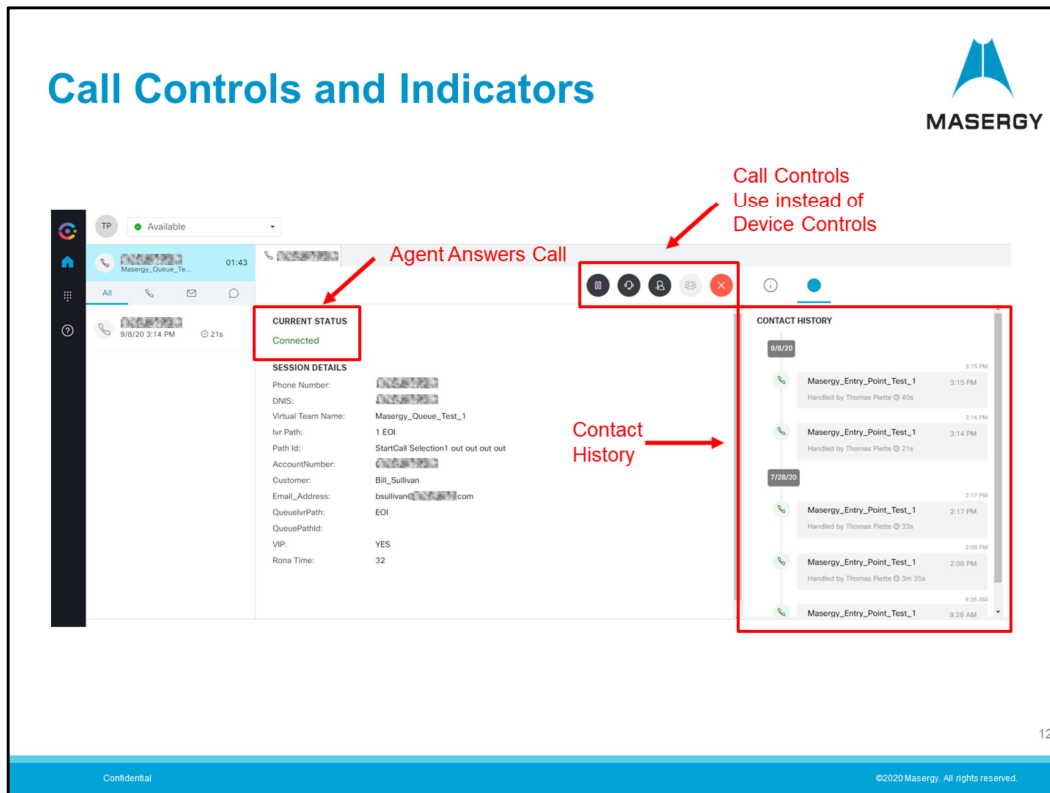
11

Confidential ©2020 Masergy. All rights reserved.

Once in the "Available" state you are able to start to receive calls.

The example shown indicates an incoming call and you are in the "Ringing" state. Also shown is the incoming call's "Session Details:

- What number the caller dialed.
- What routing path such as Queue and Team.
- If designed and provisioned the clients Account Number or Identifier can be shown.



The Agent will use their communications device to answer the call. This can be a desk phone or softphone. Answering would simply be done like answering any incoming call. Once answered the contact center service will then complete the connection between you the agent and the caller.

Note: Once answered you are now in the “Connected” state.

You will now have your “Call Controls” presented. Your calls controls will now be used to manage the call in the contact center. Do not use any calling features of your desk phone or softphone to manage the call.

Call Controls available are:

- Simple Caller Hold function
- Placing a Consult Request
- Transferring without or during consultation
- Conferencing during consultation
- Ending the call

During your Connected session you will also see and have access to any other Contact History of the caller. You will also be able to click on this history to obtain further details about previous communications this client has had such as when, whom they have spoken with, wrap-up, etc. Your current call is now added to the Contact History.

# Placing caller on-hold



The screenshot displays the Masergy call center interface. At the top, a status bar shows 'TP' and 'Available'. Below this, a call header for 'Masergy\_Queue\_Test\_1' at '04:19' is visible. A red box highlights the 'Hold' icon (a play button) in the call control bar. A red arrow points from a text box to this icon. The text box contains the following instructions:

Click to Put the Caller On Hold  
On Hold  
Icon Becomes Resume

The interface also shows a 'CURRENT STATUS' section with 'Call On Hold' highlighted in a red box. Below this is the 'SESSION DETAILS' section, which includes the following information:

- Phone Number: [REDACTED]
- DNIS: [REDACTED]
- Virtual Team Name: Masergy\_Queue\_Test\_1
- Ivr Path: 1 EOI
- Path Id: StartCall Selection1 out out out
- AccountNumber: [REDACTED]
- Customer: Bill\_Sullivan
- Email\_Address: bsullivan@[REDACTED].com
- QueueIvrPath: EOI
- QueuePathId: [REDACTED]
- VIP: YES
- Rona Time: 32

On the right side, there is a 'CONTACT HISTORY' section showing a list of call events with timestamps and handling times.

13

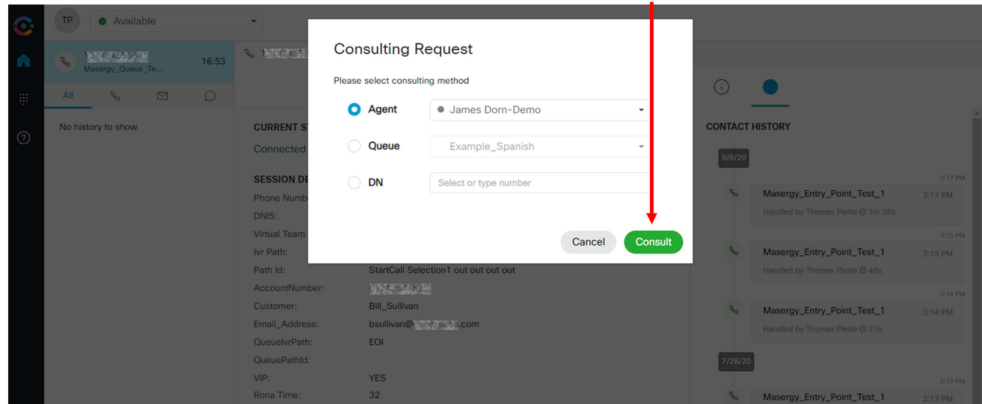
Confidential ©2020 Masergy. All rights reserved.

Placing a caller on hold is performed by using the “Hold” call control icon. That same icon now becomes “Resume” to reconnect with the caller.

## Using the Consulting Request






- Clicking on the Consult Icon
- Opens the Request Method Window
- Click the Consult Button to Complete



You may Consult with:

- Agent
- Queue
- Or Other DN

Use for:

- Obtaining info (Use Resume  To Get Back)
- Completing Warm Transfer (Use the Transfer  Button to complete)
- Or Conference Call (Use Conference Button 

14

Confidential

©2020 Masergy. All rights reserved.

The Consulting Request Icon can be used in a few different ways. They are:

- Can be used as hold function to contact another party for information and then Resume with your caller
- Can be used to perform a Warm or Attended Transfer (discuss shortly)
- Can be used to initiate Conference Call

In each instance you begin by using the Consult Request icon. Once you click on the Consulting Request Icon a window is displayed that allows the Agent to:

- Consult with another Agent through the Agent drop-down menu
- Consult with another Queue (Example: Call came into Sales but was a Support question)
- Consult to another outside party or location. This can also be a Mobile user. Enter a full 10 Digit number. A Speed-Dial list can also be created and managed by the system Administrator so that this also becomes a drop-down menu for frequently used numbers.

Once selected or a number is entered press the Consult button to complete the call.

# Consulting Request Choices



### Consult Request Selection:

- Agent
- Queue
- Or Other DN
  - Frequently Used Number
  - Extension or Outside Number

Consulting Request

Please select consulting method

Agent  Queue  DN

James Dorn-Demo

James Dorn-Demo

Select or type number

Cancel Consult

Consulting Request

Please select consulting method

Agent  Queue  DN

James Dorn-Demo

Example\_Spanish

ABC COMPANY\_AH

ABC COMPANY\_AH2

ABC COMPANY\_TES\_Q

Consult

Consulting Request

Please select consulting method

Agent  Queue  DN

James Dorn-Demo

Example\_Spanish

Select or type number

Speed Dial Menu:

- Billing Direct
- DFW Sales
- LAX Sales
- Main Toll Free
- PHX Sales
- Support Direct

Cancel Consult

15

Confidential

©2020 Masergy. All rights reserved.

This diagram shows the three Consulting Request Options in more detail and highlights the use of a speed dial menu.

Any phone numbers entered into the DN (Dialed Number) selection need to be entered as full 10-digit numbers with no dots, dashes or spaces. Using a digit 1 is optional but not necessary.

Also you do not need a leading out-dial digit such as an 8 or 9 to access an outside line. If you needed to do this in the past to get an outside line you no longer will need to do this going forward.



# Consulting Call Options



The screenshot displays a call center interface with a sidebar on the left, a main call control area at the top, and a session details panel on the right. The call control area includes icons for mute, hold, transfer, conference, and end call. The session details panel shows the current status as 'Consulting 00.11' and lists various session parameters. A contact history panel is visible on the far right.

Clicking On The Consult Icon A Second Time Will End the Consulted Call

Use The Conference Icon For 3-Party Call

Use Transfer Icon For Warm Transfer

16

- Once in the Consulting state we see the Call Controls reappear to allow the Agent to:
- End the consulted call. Use the Resume icon to reconnect with the original caller.
  - Or
  - Use the Transfer icon to complete a Warm or Attended transfer.
  - Or
  - Use the Conference icon to add the caller and have a 3-party conference call.

## Blind Transferring



Clicking on the Transfer Icon  
Opens the Transfer Request Method  
Window

Transfer Request

Please select transferring method

Agent

Queue

DN

Cancel Transfer

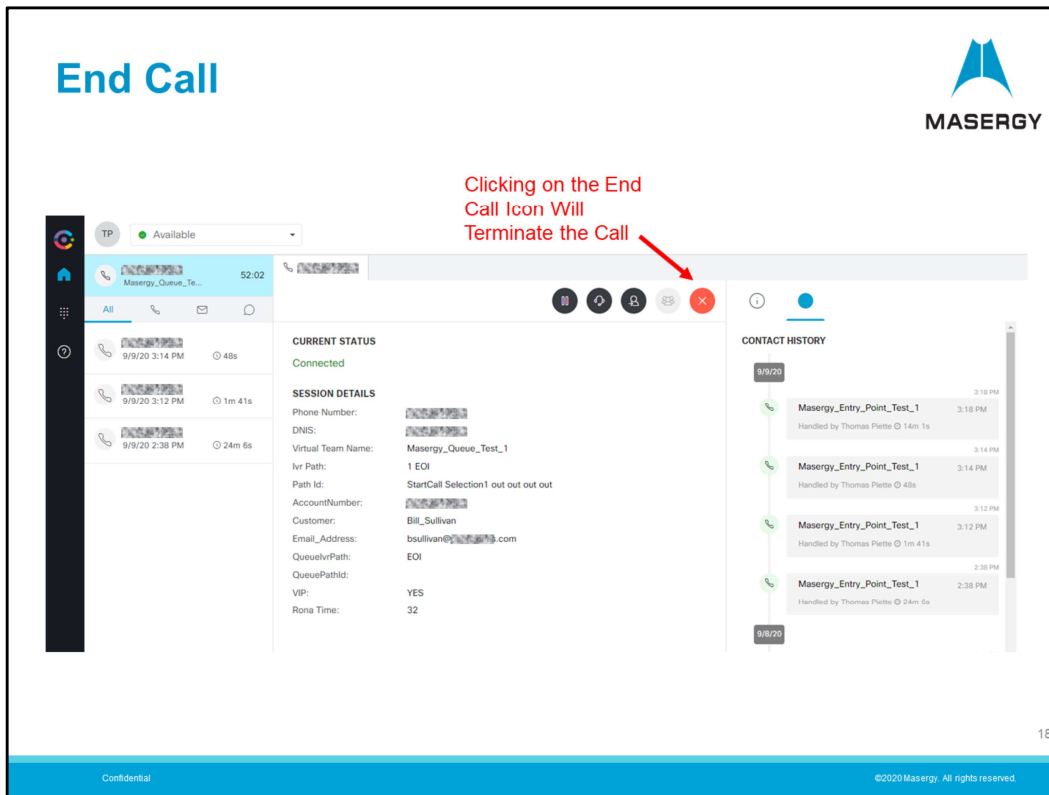
Clicking on the Transfer Button  
Completes the Blind Transfer

17

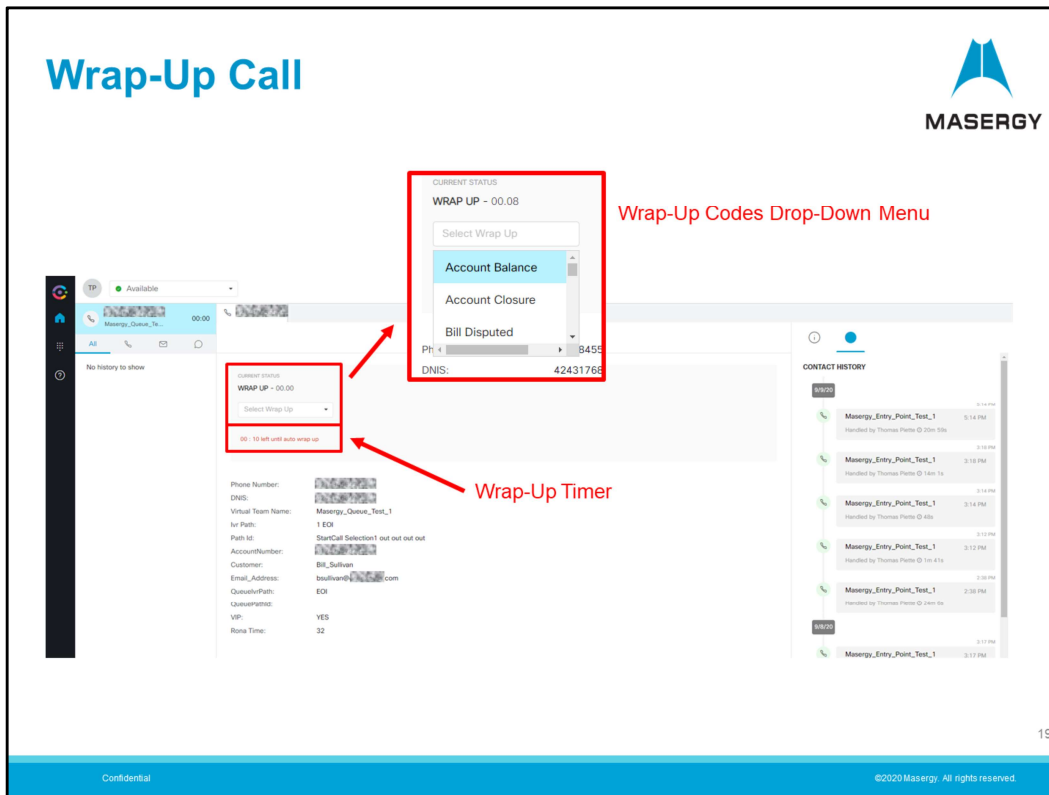
Confidential

©2020 Masergy All rights reserved

Blind transferring is performed by not using the consulting option first but instead simply click on the Transfer icon. The window shown opens allowing the agent to select the party to whom the call is to be transferred to. Clicking on the Transfer icon displayed in the window then completes the Blind transfer.



An agent may end the call by simply using the red End Call icon. Should the caller disconnect, call control signaling from the terminated caller path may also terminate the call. Once the call is terminated the agent will now be in the Wrap-up stage.



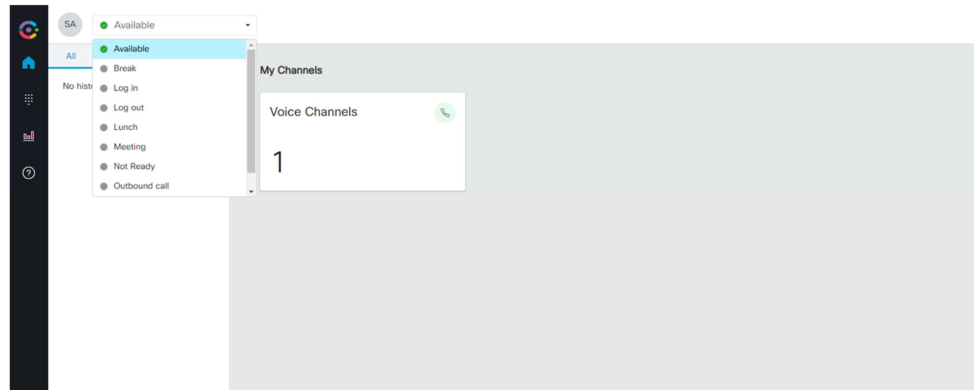
Once in the wrap-up stage the Agent will be given the opportunity to select a Wrap-up code (if configured) from the drop-down menu shown. The codes available to choose from are used to give a “Reason” code for the call for reporting purposes. These codes may added or modified by the system administrator.

In addition to Wrap-up codes a Wrap-up timer may also be used. The timer can be used in conjunction with the codes or not used at all. Design and provisioning would determine if both or neither are used. The length of the timer can also modified by the system administrator. The Wrap-up timer can also predetermine a code if none is selected.

## Using Idle Codes



Agents can choose from the an “Idle” code to stop receiving calls or incoming caller messages through the Call Center. Choose the correct code from the drop-down list.



20

Confidential

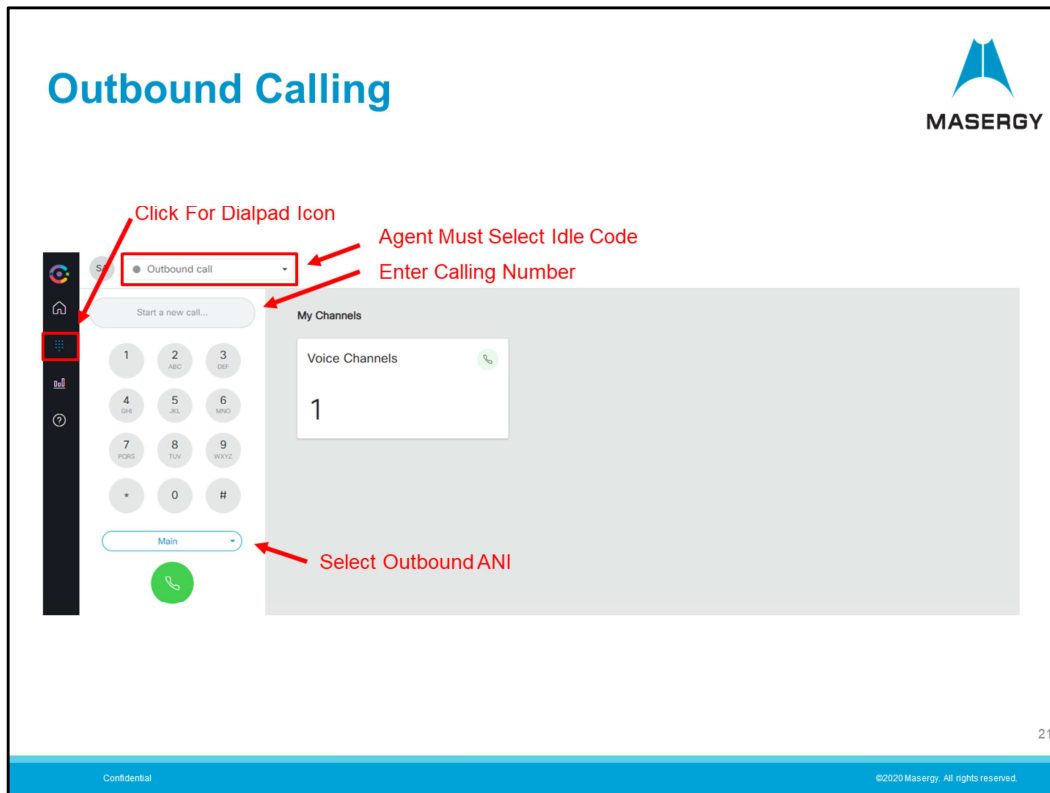
©2020 Masergy. All rights reserved.

The Agent is in the “Available” state until such time as an “Idle” code is chosen. Agents will have a predetermined list of available “Idle” codes to choose from for the given circumstance to stop receiving calls or communications through the Call Center. The list of available “Idle” codes is also managed by the system administrator.

An “Idle” code can be chosen while currently on a call. Using it in this way will prevent the possibility of receiving a next call in the event that you want to take a break or are ending your shift after this call. This eliminates the possibility of receiving a another caller or communication immediately after wrap-up.

Once you want to receive calls or communications again, simple place yourself back into the available state.

Note: The agent should never leave the workstation while in the available state. If taking a break always place yourself in the appropriate Idle state first. This will prevent “Bounced” calls. (Calls being returned to the Queue).



If an Agent is equipped with the Outbound Dialing capability an icon will be available on the navigation panel showing a dial-pad or key-pad. Clicking on the icon opens the outbound dialer. This is used when the outbound call should be made through the Contact Center. Outbound calls made using the agents communications device or softphone alone will not be tracked through the Contact Center and may not present the correct outbound number identification. Outbound calls such as campaign calls or any call representing the Contact Centers Caller ID should be done in this manner. In this way any statistics or call management features need while the call is in process will be available. This will also insure that the called party receives the correct Caller ID information.

Note: Outbound calls cannot be made while in the available state. The keypad will be disabled until an idle code is selected. There will be an appropriate Idle to select from for making outbound calls. Once the Idle code is selected the keypad becomes functional.

Enter the number using the keypad or workstation number keys. You may also do a copy and paste if obtaining the number from a document, etc. Any phone numbers entered into the DN (Dialed Number) selection need to be entered as full 10-digit numbers with no dots, dashes or spaces. Using a digit 1 is optional but not necessary. Also, you do not need a leading out-dial digit such as an 8 or 9 to access an outside line. If you needed to do this in the past to get an outside line you no longer will need to do so.

Once the number is entered you may need to select the Outbound ANI to be sent to the called party. If the Agent is a member of multiple Contact Center Teams/Queues it may be appropriate to ensure that the called party receives the correct Call-back identifying number. If the Agent is a member of only one, then only that one will be available. Once the number has been entered the call can be made using the Call Button at the bottom of the key-pad.

The outbound call will now proceed to the Outbound Calling Reserved stage.

## Outbound Calling - Continued



**Note: Steps To Complete Outbound Calling:**

- (1) Agent line will ring – Answer Incoming Call To Agent  
- This Establishes Connection to Agent First
- (2) Contact Center Then Calls Client Phone Number

22

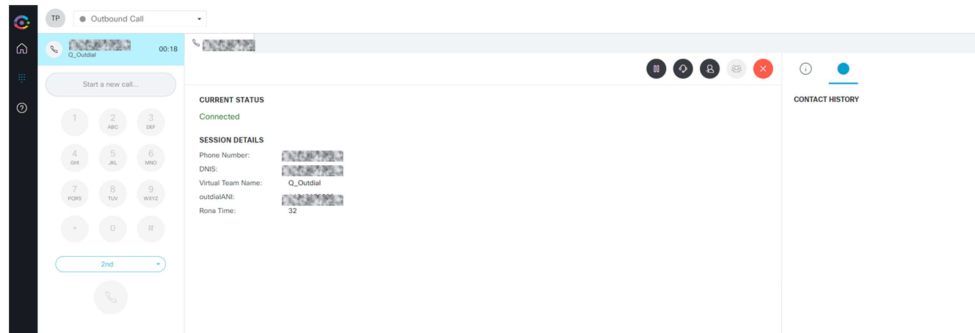
Confidential ©2020 Masergy. All rights reserved.

The first step when the Contact Center is processing the outbound call is to contact you, the Agent first. This is the first of two steps to process the outbound call. In the first step the Contact Center will call the Agents dialed number (DN) that was entered when the Agent logged in, Just like there was the two-step process to receiving calls through the Contact Center, outbound calls are processed in the same manner. The Contact Center is doing this to ensure that there is communication between the Agent and the service and to make sure any statistics gathered is available through the Contact Center's reports.

The Contact Center is first placing a call to the Agents DN and the associated device or softphone is Ringing. Once the Agent answers then the call is placed to the called party number and ringback tone is heard by the Agent.



# Outbound Call in Progress



(3) Called party Answers  
Note: Connected Status And Call Controls Are Enabled

Note 2: Ending The Call Will Enable Wrap-Up Screen

23

Confidential

©2020 Masergy. All rights reserved.

Once the Called party answers, the Agent is placed in the “Connected” state and the Call Controls are enabled. At this time any contact history is also being updated and the Call Controls provide the calling features for Hold, Consulting, Transfer and Conferencing.

Ending the call will then enable the Wrap-up screen.

# Agent Statistics

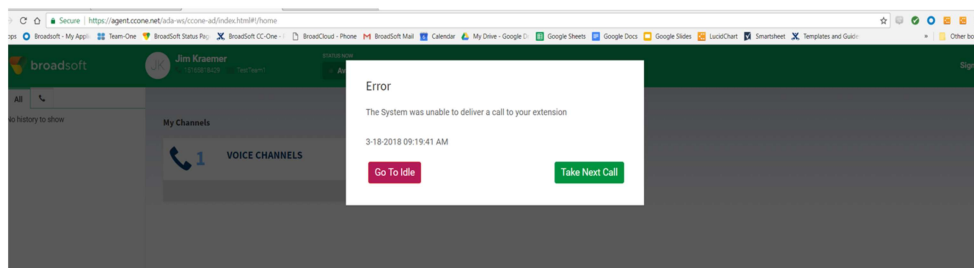


Click Icon For Access To Agent Reports/Statistics

| Agent Name       | Login Time                      | Current State | Calls Handled | Average Handle Time | Min Count | Total Calls | Average Min Time | Available Count | Total Available Time | Average Available Time | Consult Count | Consult Time | Hold |
|------------------|---------------------------------|---------------|---------------|---------------------|-----------|-------------|------------------|-----------------|----------------------|------------------------|---------------|--------------|------|
| Armando Castilla | Wednesday, 21-Oct-2019 13:27:34 |               | 1             | 00:00:02            | 2         | 00:07:25    | 00:03:58         | 4               | 00:00:00             | 00:00:00               | 0             | 00:00:00     |      |
| Voice            | Wednesday, 21-Oct-2019 13:27:34 |               | 1             | 00:00:02            | 2         | 00:07:25    | 00:03:58         | 4               | 00:00:00             | 00:00:00               | 0             | 00:00:00     |      |
| Voice            | Wednesday, 21-Oct-2019 13:27:34 | Available     | 1             | 00:00:02            | 2         | 00:07:25    | 00:03:58         | 4               | 00:00:00             | 00:00:00               | 0             | 00:00:00     |      |

If an Agent is equipped with the ability to access their own Statistics/Reports it will be available as an icon depicting a graph in the navigation panel. Clicking on this icon will bring up a summary Dashboard and provide access to statistics on themselves and the team. This can be useful if one has KPIs to meet and you as an Agent want to track your own performance. What reports/statistics are available is administered by the system Administrator.

## Other Applet Appearances – Not Responding



### Common Causes

- Not Answering the phone when it rings (timer expires)
- Forgetting to go IDLE when
  - Leaving their desk (restroom break, etc.)
  - Receiving or making calls on phone outside of WxCC (direct calls, multi-line phones, etc.)
- Network Issues with DN/phone line

25

Confidential

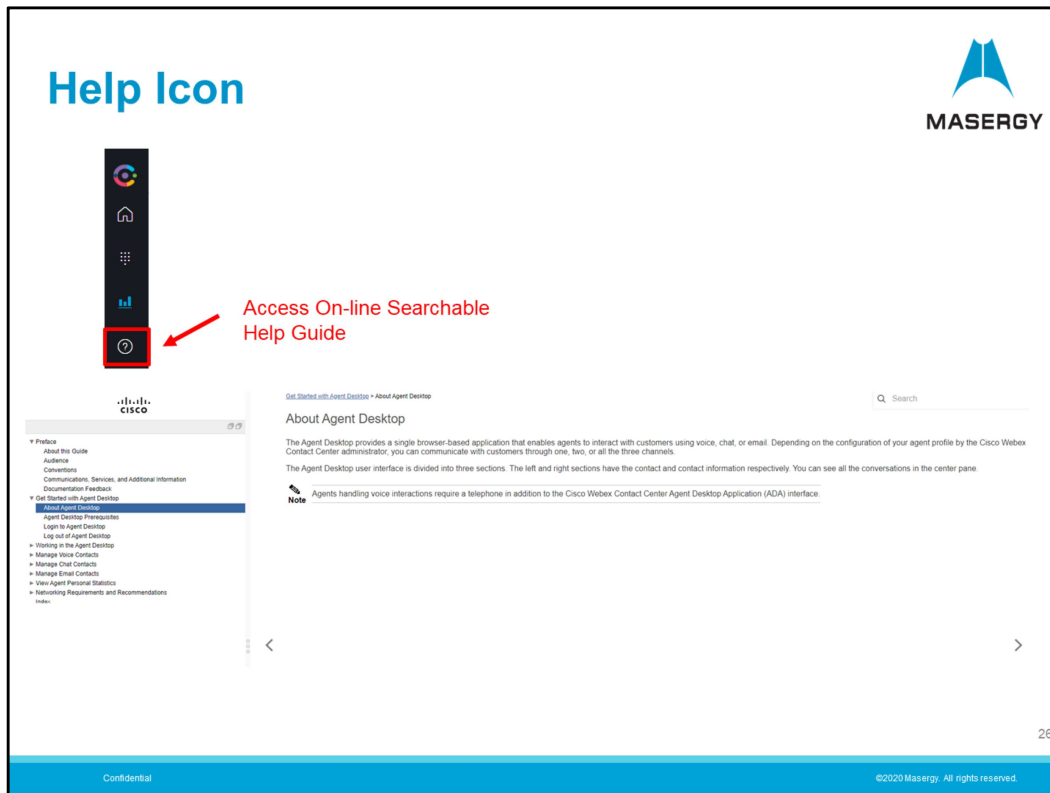
©2020 Masergy. All rights reserved.

A “Not Responding Error” message will be received if at any time you have not answered your inbound call from the Call Center. Calls must be answered within the prescribed time and if not the call will be returned to the queue or Bounced. This may be the result of not placing yourself in an Idle state before taking a break or simply a missed call. It is important to remember that if you intend to take a break, step away from your workstation or end your shift, that you put yourself in the appropriate idle state first.

The referenced timing is part of the provisioning and the System Administrator can modify that timer.

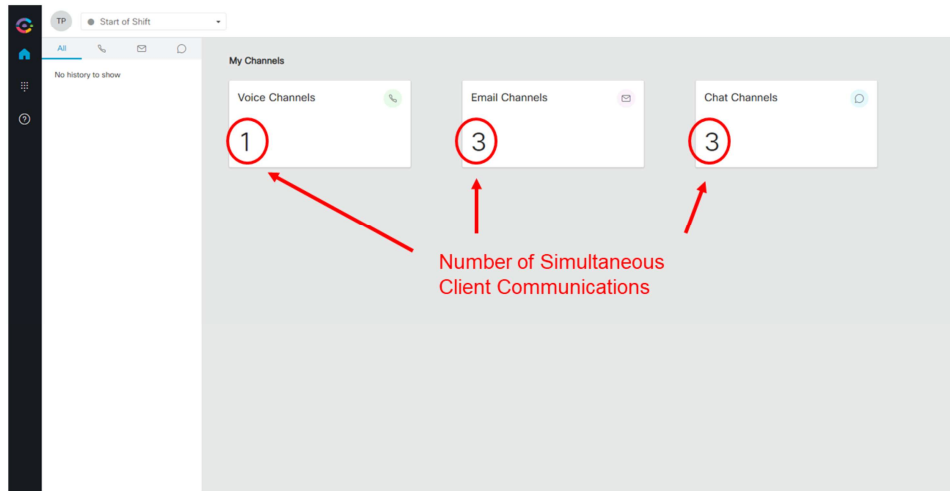
The Error message received could also result from a network impairment whereby the Contact Center could not extend a call or communicate with the agent.

Note: Once the error message is received you have the opportunity to continue to be Idle or make yourself Available to take calls.



An on-line Help guide is available by clicking on the Help or question mark icon. This will open the on-line guide for you as a reference. A table of contents is provided that will link you to the topic and/or open for further choices. The guide is also search-able by Keyword.

# Agent Screen – Omni-Channel Support



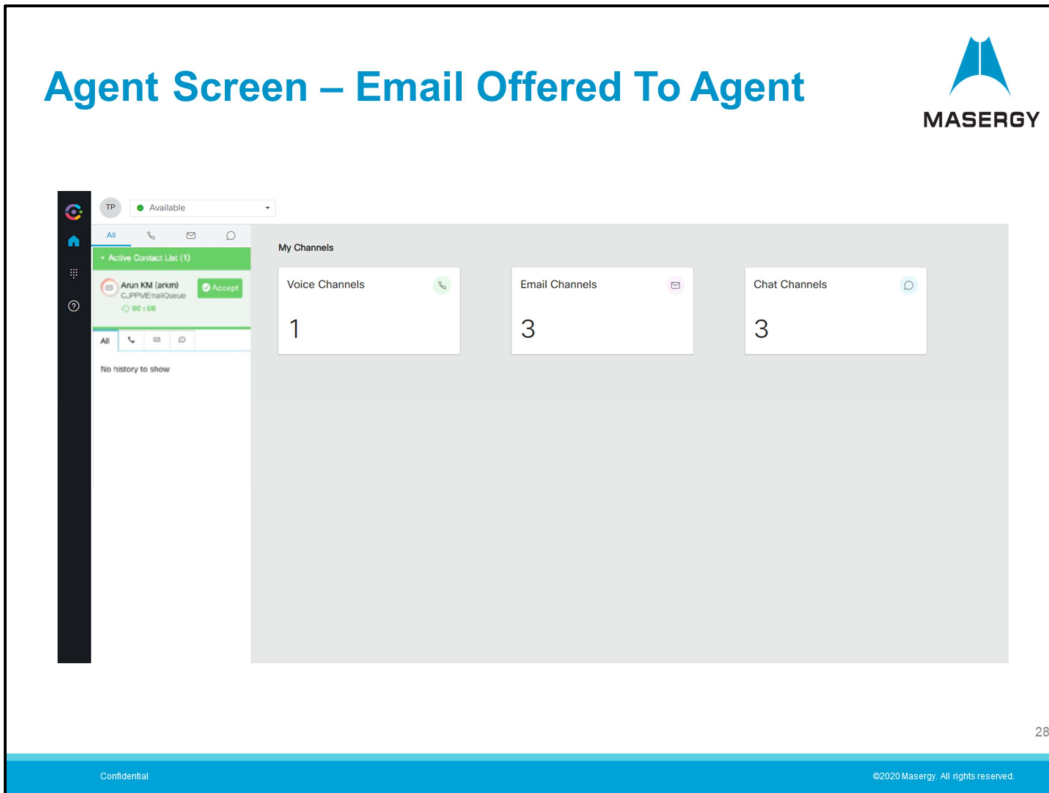
27

If your Contact Center has been designed for Omni-Channel services also known as Multi-channel, once logged in you will see the “Other” channels of communications offered. In addition to Telephony communications an Agent can also be provisioned to support Email and Chat forms of communications from clients through the Contact Center.

Note: In Large font size a number identified in the boxes for each channel. This indicates how many communications can simultaneously be sent to you the Agent. The above indicates 1 x phone call, 3 x emails and 3 x Chat sessions can be handled at the same time.

When the system is designed the number of channels or simultaneous forms of communications are determined and then provisioned. This may be determined by Agent skill level and is modifiable by the system administrator. Typically initial deployments are provisioned using low numbers and may be increased over time as agents become more proficient.

# Agent Screen – Email Offered To Agent



Lets take a look at a client communication with the contact center using email.

Here we see an Email Message being sent to the Agent in the left side of the desktop console.

# Agent Screen – Agent Accepts Email

## Quick Reply or Reply With Rich Text Editor



Click to Accept

Use the Quick Reply To Respond

Or Enable The Rich Text Editor For Response

29

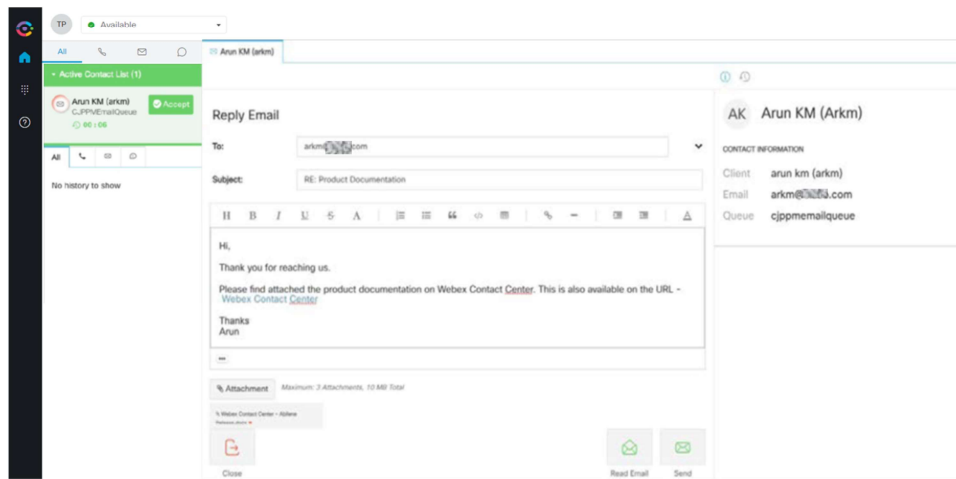
Confidential

©2020 Masergy. All rights reserved.

The Agent will then click to Accept the message to respond to. The Agent has the choice to respond using a Quick Reply or reply using the Rich Text editor. The Quick Reply uses Plain Text in the response field.

## Agent Screen – Agent Reply

Agent Response Using Rich Text Editor  
Attachments and URLs Possible



30

Confidential

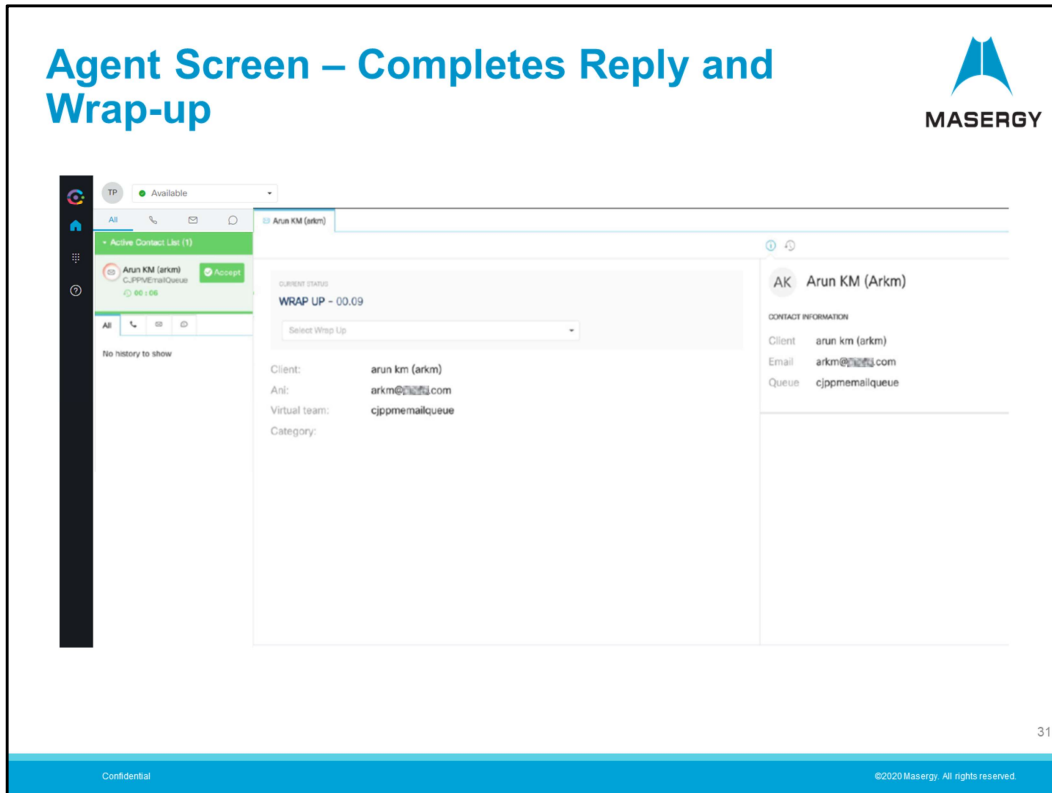
©2020 Masergy. All rights reserved.

When using the Rich Text editor you can adjust your response allowing you to:

- Add hyperlinks
- Add attachments
- Adjust Font style types, color and size.
- Rich Text allows you to give the response some customization and pizzazz.
- You may also add multiple email addresses in the address “To” field.



## Agent Screen – Completes Reply and Wrap-up



Once your response is completed, much like your telephony channel, you are now presented with the wrap-up stage.

Choose the appropriate wrap-up or reason code as appropriate. Just like the Telephony channel you need to use the appropriate idle code when taking a break, lunch, end of shift, etc.

Note: That for Chat session communications, the experience is very similar to the “Quick Response” with the exception that your messaging is back and forth in near real-time.

## Operational Procedures to Remember



- ❖ Agents must use the URL and login credentials you will be provided with (check email for initial credentials)
- ❖ Agents must know phone number where they will accept Calls
- ❖ Phone numbers should be entered as numeric only (no dashes, dots, etc.)
- ❖ Agent use of Idle state
  - before leaving their desk
  - before placing outbound calls
  - when taking non-call center calls (direct calls; multi-line phones, etc.)

32

Confidential

©2020 Masergy. All rights reserved.

In summary here are some operational procedures to remember:

- Agents must use the URL / web address provided. Bookmark this URL rather than the site you may be redirected to during the session.
- Use only the login credentials provided to you by system administration.
- Use the 10-digit phone number where you will accept calls from the contact center
- Phone numbers should be entered as numeric only. No dots, dashes, spaces, etc.
- Use the appropriate idle state when:
  - Leaving your workstation
  - When placing outgoing calls
  - Using an idle state should be considered when taking or making non-contact center calls.

Additional Masergy Contact Center Support and Training resources:

- Contact UC Support Help Desk: Email us at [UCSupport@masergy.com](mailto:UCSupport@masergy.com) or call + (800) 942-4700
- Contact UC Training to schedule a live Training session: Email us at [UCTraining@masergy.com](mailto:UCTraining@masergy.com)