8x8 Global Cloud Communications

Virtual Contact Center

Supervisor User Guide

Preface

Virtual Contact Center from 8x8 is the fastest and easiest way to deploy a world class contact center.

Virtual Contact Center makes it easy to manage all of your customer interactions: phone, email, and chat, through a single system. Our award-winning solution is 100% web-based and was developed by industry-leading designers to be extremely easy to use, thus speeding the adoption process for both agents and supervisors. The Virtual Contact Center includes all of the functionality you need to provide an exceptional customer experience: skills based routing, multi-media interaction management, IVR, CTI, case & contact management, call recording, real-time monitoring, desktop sharing, reporting, and much more.

This guide provides supervisors with the information necessary to use the Supervisor Console to:

- Manage customer interactions
- Perform administrative tasks

Depending on your subscription, some components described in this guide may not be included in your purchased subscription.

8x8, Inc.
SALES: 1.877.725.2621
SUPPORT: 1.866.975.2273
vccsales@8x8.com
www.8x8.com

Contents

Overview

The Virtual Contact Center Agent Console enables agents to use a graphical user interface (GUI) to manage customer interactions across all channels. Agent Console is easy to use and requires no special software or hardware to run. It is 100% cloud-based and accessible from anywhere and anytime as long as you have a computer and internet access. With Agent Console, agents can have quick access to FAQs, use the Local CRM or their familiar External CRM, and see and chat with other agents for coaching and help. Agent Console administrators can take advantage of the permission-based application by allowing agents to access certain functions until they are up-to-speed and ready to take advantage of the full capabilities. See Get Started and Understand Your Interface to learn how to start.

You can log in as an administrator, supervisor, or agent:

- If you are the contact center's primary administrator, 8x8, Inc. provides you with the information you need to access and configure your Virtual Contact Center.
- If you are a supervisor, you can obtain your Supervisor Console login credentials from your administrator. Supervisor Console is simply the Agent Console with exclusive access to supervisory features. See Administer Contact Center for more information.
- If you are an agent, your contact center supervisor provides you with the information you need to access your Agent Console account, as well as your contact center policies and guidelines for using that account.

System Requirements

Each agent workstation requires a phone and a computer with Internet address:

- A dedicated physical phone or a softphone, such as Bria (Windows and Mac), that is available exclusively for handling Virtual Contact Center phone interactions during working hours. See Change Your Workplace Number for details.

- A computer equipped with one of the following browsers:
  - Internet Explorer 9, 10, or 11
  - Microsoft Edge browser
  - Chrome
  - Firefox

For information about agent workstation technical requirements, see your contact center supervisor, or refer to the Technical Requirements document.

Note: Compatibility View must be disabled in Internet Explorer 9 or older.

Note: Chrome and Firefox do not support the Collapse Window functionality in Agent Console.

Localization Support

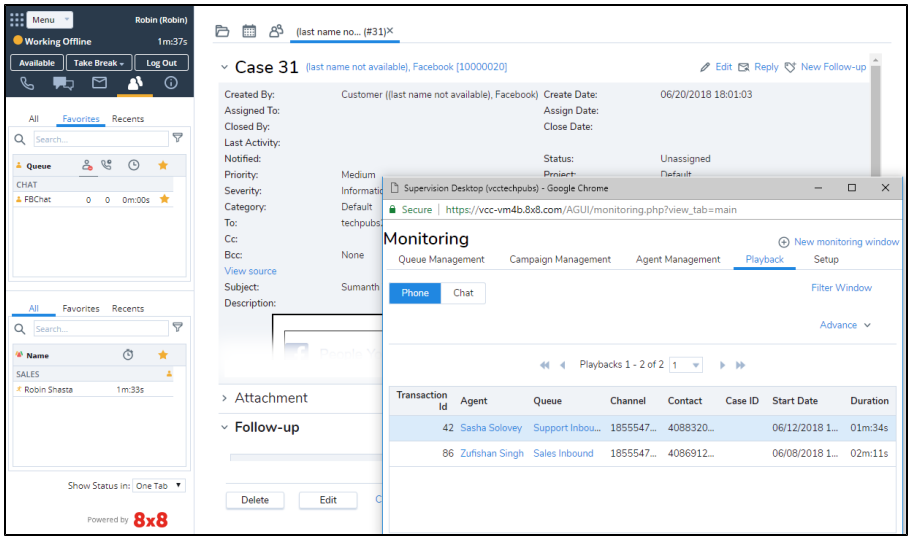
- Agent Console is supported in English, European French, and German.
- Customer Experience is supported in English and Canadian French.

What's New in the Virtual Contact Center 9.6 Release for Supervisors?

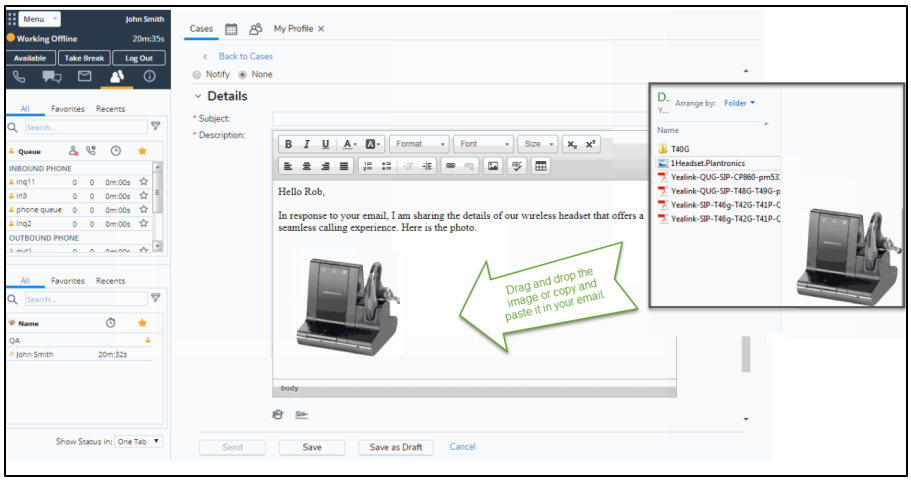
New features and enhancements to Supervisor Console impact supervisors and agents. Some of these features are available to agents and supervisors by default, while others need to be enabled by administrators to benefit from the functionality.

The following are features and enhancements introduced in recent product releases:

- **Refreshed New Look for Virtual Contact Center**: Whether you are an agent or a supervisor of Virtual Contact Center, you will certainly love the new refreshed user interface of all our applications. Look out for the notifications when you launch your application. Please note that we have kept all our functionality workflows intact so there is no learning curve for you.



- Enhanced Usability of Rich Text Editor: Agents using the Local CRM can now craft their cases, follow-ups, and FAQs using the updated rich text editor. Drag and drop your images or paste them from your clipboard quickly improving your productivity.



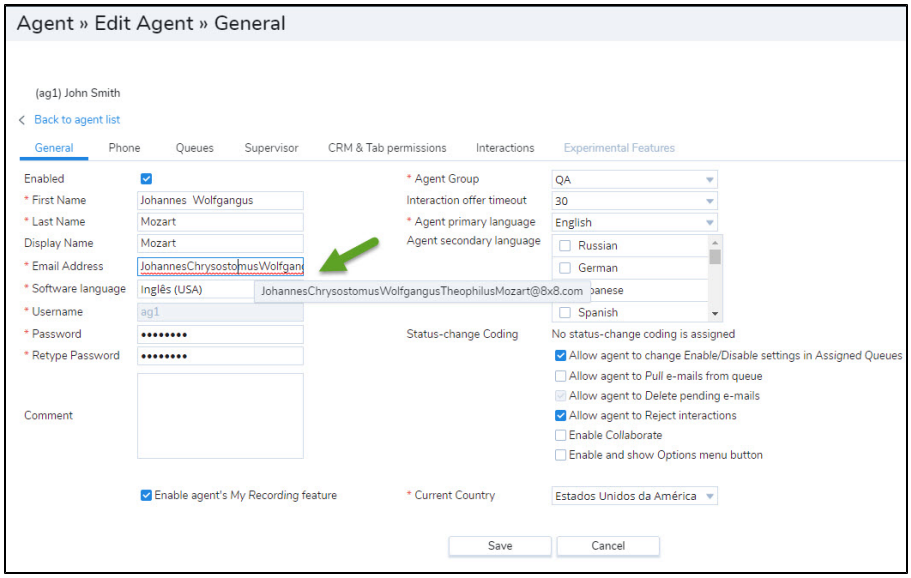
Known Issue: Copying (Ctrl-C) and pasting (Ctrl-V) images is currently not supported on Internet Explorer 11. You can drag and drop the images.

- Enhanced FAQs for Customers: Assist your callers with more elaborate FAQs not worrying about the limited word count. The character limit for your FAQ is now increased from 4k to 40k.

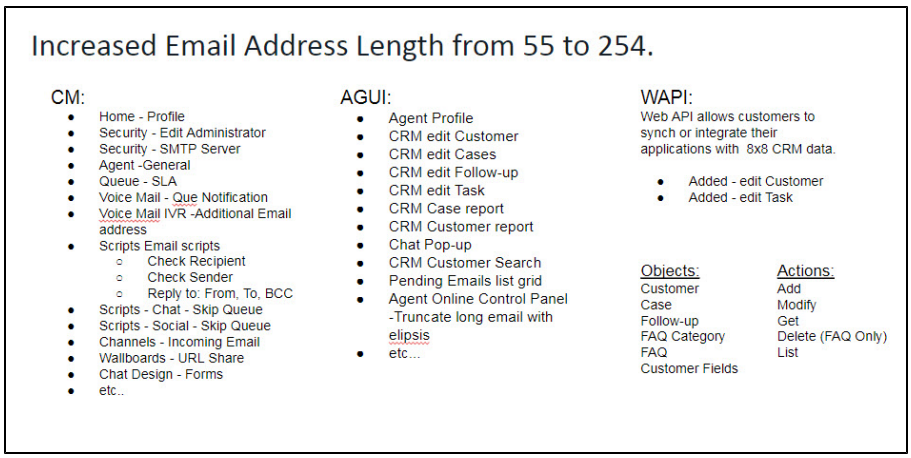
  Supervisors manage content of FAQs to be used by all agents. To verify the behavior:

  1. Simply log in to your Supervisor Console.
  2. From the Menu, select **Help > FAQ**.
  3. Click **Add FAQ**.
  4. Add a new FAQ that runs to approximately 3-4 pages of text content.
  5. Save the FAQ. You will notice the FAQ is saved even if the character count exceeds 4k.

- Increased Length of Email Addresses: You can now save email addresses exceeding 55 characters. The maximum limit now stands at 254 characters. This change allows many areas such as saving longer email IDs of agents, customers in Local CRM, setting up email notification for voicemails, and more.



For the complete list of areas benefited with this enhancement, see below.



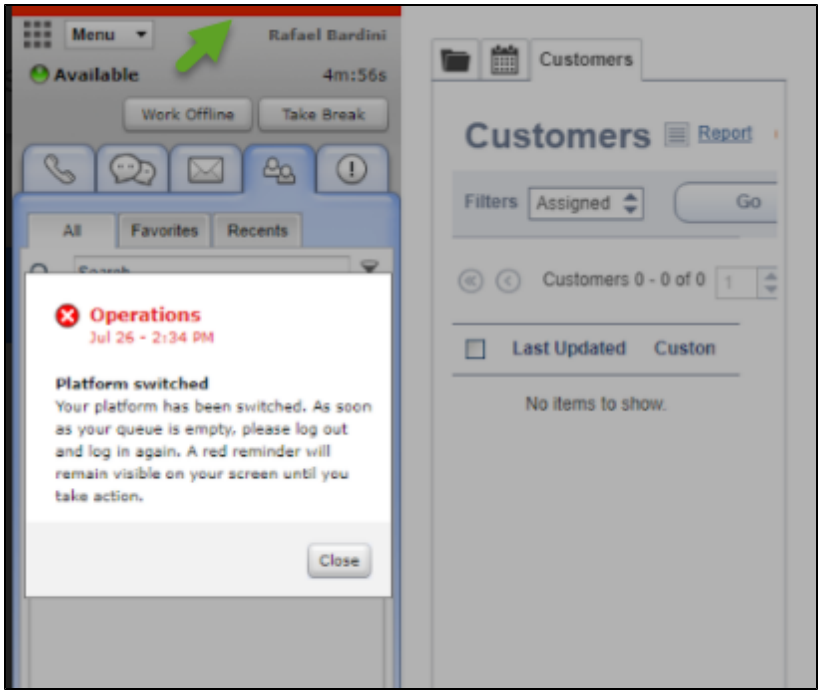
- Compressed Embedded Images: When you embed a high resolution image in your case, follow-up, or an FAQ, they are compressed automatically for faster processing and for saving bandwidth. Simply drag and drop the desired images into your content.

Note: The maximum size allowed for image attachments is 20 MB. You can drag and drop images up to a maximum size of 10 MB.

What's New in the Virtual Contact Center 9.5 Release for Supervisors?

The following are features and enhancements introduced in recent product releases:

- **Improved Broadcasting**: Agents now receive an improved broadcasting message informing them of a platform switch. In addition to the notification message, a red alert bar also shows up at the top of the Control Panel alerting agents and reminding them to exhaust the interactions waiting in the queue. Agents are required to log out and log back in as they may experience some instability during the platform switch. This feature is specific to agents, but also available to supervisors.



- **Ability to save agent preferences on server**: Agents can now save their preferred settings on the server and access them on different computers or browsers. Prior to this enhancement, agents were able to save their preferences on their profiles and access them at the browser level only. This feature is specific to agents, but also available to supervisors.
- **Allow agents to change display name**: This new improvement allows agents to present themselves with a customized display name. The new feature ensures the agents privacy and helps them save time and effort to introduce themselves to customers every time they start a new chat. The agent display name appears in the Agent Console's Control Panel, Profile page, chat window, and CRM case created after a chat session. It can be modified by the Virtual Contact Center administrator in the Configuration Manager, or if permitted, by the agents in Agent

Console. The updates in Agent Console application immediately appears in Configuration Manager and vice versa. This feature is specific to agents, but also available to supervisors. See Configure your Profile to learn how agents can configure their profiles.

Previous Releases

Release 9.4.3

- **Agent Whisper**: Contact center supervisors can barge into active calls between agents and customers, listen in, and coach or train agents live with the Whisper feature.
- **Automatic Monitoring**: The silent monitoring feature allows supervisors to eavesdrop on a conversation between an agent and a customer without either party knowing that they are being monitored.
- **Enhanced usability of real-time monitoring**: Supervisors can access the monitoring tool from an easy-to-access monitoring tab along with other Local CRM tabs.
- Ability to pop open the monitoring window: Supervisors can open the monitoring window in a separate pop-up window.
- **Improved Monitoring**: The monitoring data is updated even when the supervisor's status is Break. Moreover, the last monitoring configuration before the supervisor logs out is saved, and presented when they log back in.
- **Localization**: We support European French and German.
- **Browser Support**: We support the Microsoft Edge browser.

Get Started

Your contact center supervisor provides you with the URL, username, and password required to log in to your Agent Console account. See Login for the URL link and information. You do not need any specific hardware or downloads to run the Agent Console application. Agent Console is 100% cloud-based and runs on most computers with an Internet access, allowing you to keep business running smoothly.

Using Agent Console agents can:

- process interactions of all media including phone, chat, email, and voicemail.
- process both inbound and outbound interactions.
- track the status of agents and queues.
- provide quick answers to customer questions using the FAQ knowledge base.
- manage CRM data by integrating with Local CRM or supported External CRM.
- collaborate with a remote desktop for real-time assistance or Co-browsing capabilities.
- create and delete FAQ categories and answers.
- create and run historical reports.
- monitor agents, queues, groups, and campaigns.

Log In

Based on the configuration of your Virtual Contact Center, you may receive the login information through a system-generated email or from your supervisor manually. The login information includes username, a system-generated password, and a URL link to Agent Console.

To log in to Agent Console:

1. In your preferred browser, enter the URL for your Agent Console.
2. In the login page, enter your username and password. Click **Login**.
3. By default, Agent Console launches in the **On Break** status.

> **Note:** Agent Console usernames and passwords are case sensitive. If your access to Agent Console is denied due to IP address restrictions, an automatic email is sent to your Virtual Contact Center administrator. The administrator is then able to give you the access authorization.

4. Select **Available** or **Work Offline** status to initiate the session.

Login (Unified Login and Virtual Office)

If you are a Virtual Contact Center user with Unified Login and Virtual Office, use https://login.8x8.com to log in to Virtual Contact Center applications. Whether you are a supervisor or an agent, you can sign into any of these roles with a unified username and password. Every user in Virtual Contact Center receives a system-generated email notification with the login credentials. The email includes the login URL, username, a temporary password, and a link to create a password. Click the link to set your password and log in.

To log in to Agent Console:

1. In your preferred browser, enter https://login.8x8.com/.
2. In the login page, enter your username and password. Click **Login**.
3. The 8x8 application panel launches listing all the applications available to you.
4. Select the Virtual Contact Center agent application to launch.
   By default, Agent Console launches in the **On Break** status.

> **Note:** Agent Console passwords are case-sensitive. If your access to Agent Console is denied due to IP address restrictions, an automatic email is sent to your Virtual Contact Center administrator. The administrator is then able to give you the access authorization.

5. Select **Available** or **Work Offline** status to initiate the session.

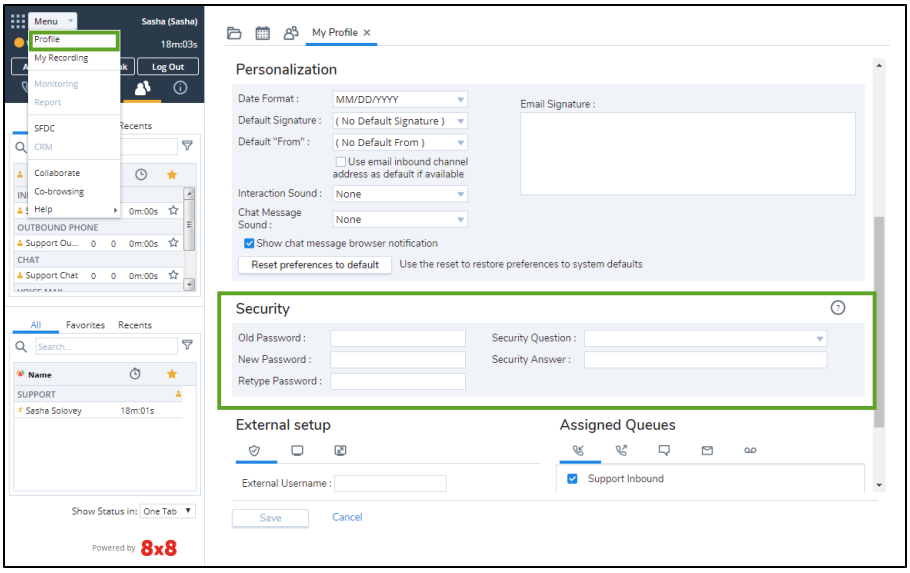
Create a New Password (Except for Unified Login and Virtual Office)

Note: This option is NOT available to Virtual Contact Center users with Unified Login and Virtual Office.

After you receive your account login credentials set by an administrator, log in to Agent Console using the credentials. If you are not using Virtual Contact Center with 8x8 Unified Login and Virtual Office, you can create a new password by going to your Agent Console **Profile > Security**.

To create a new password:

1. Log in to Agent Console.
2. Go to **Profile** from the Control Panel menu.
3. In the **Security** area, enter the old password.



4. Enter the new password.

Note: Hover over ? to know the password length.

5. Retype the new password and click **Save**.

> **Note:** If your password fails to meet the password criteria set by the administrator, a message prompts you to retype the password.

Your new password is activated from the next login session.

Reset Your Password

If you forget your password to log in to Agent Console, you can reset your password automatically by providing your username and tenant name. The new password is sent to the email address specified in your agent profile. If you have set up a security question and answer in your profile, a link to the security question is emailed to you. On answering the question correctly, you receive the reset password in an email. This additional step proves that the person requesting to reset the password is the one assigned to the agent account.

To reset your password:

1. Click **Forgot Password** in the login screen.
   A dialog box appears prompting for username.
2. Enter username in the textbox exactly as you would for logging in to Agent Console and click **Continue**.
   A message indicates a new password is sent to your email address with the required information to proceed.

> **Note:** A username can be in one of the two forms: *agent_id@tenant_id*, or if the tenant id is provided as a parameter in the login URL, username can be *agent_id*. Please confirm with your administrator if you are not sure.

3. Open your email and click the link in the email. A dialog box opens prompting for an answer to your security question.

> **Note:** If you have not set up a security question and answer in your profile, you receive a reset password in the email.

4. Enter your answer to the security question. If you answered the question right, a message including a reset password is emailed to you.
5. Open your email to obtain the system generated reset password.

Log in after You Reset Your Password

You are allowed to use a reset password to log in to Agent Console only once. Upon logging in to Agent Console with your reset password, you are prompted to change the password. If you fail to change the password, you are automatically logged out.

To log in with a reset password:

1. Open your email to obtain the system generated reset password.
2. Log in to Agent Console with the reset password. You are logged in successfully and prompted to change the password.
3. Enter a new password and click **Change** to proceed with the login.

Reset Username and Password (Unified Login and Virtual Office)

If you are using Virtual Contact Center with 8x8 Unified Login and Virtual Office, you can reset your username and password by clicking **Help** on the login screen. You then receive an email including a password link. This additional step proves that the person requesting to reset the password is the one assigned to the agent account.

To reset username and password:

1. Click **Help** on the login screen.
2. Select one of the following options:
   - **Forgot Password**
     a. Enter your username and click **Send**.
     You receive an email with the instructions to reset your password.
     b. Click the link in your email and follow the instruction.
     c. Enter a new password.
     d. Click **Submit**.
     The password is changed and you receive a confirmation email.

- **Forgot Username**
  a. Enter your email address and click **Send**. Your email addresses can have up to 254 characters.
  b. Your Username is sent to you in an email.

Log Out

Whenever you are not scheduled to work, you must log out of Agent Console. If you fail to log out, Agent Console reports your status incorrectly.

To log out of Agent Console:

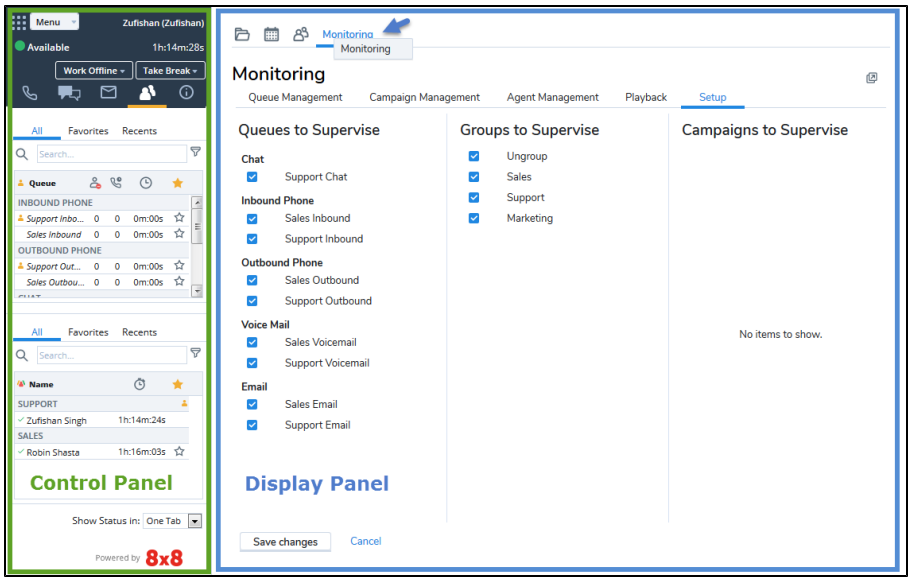
1. In Agent Console, click **Work Offline** or **Take Break**.
   You must have the **Working Offline** or **On Break** status to display the option to **Log Out**.
2. Click **Log Out**.

Note: Closing the browser containing Agent Console does not log you out. You must click **Log Out** in the Control Panel in order to log out of Agent Console.

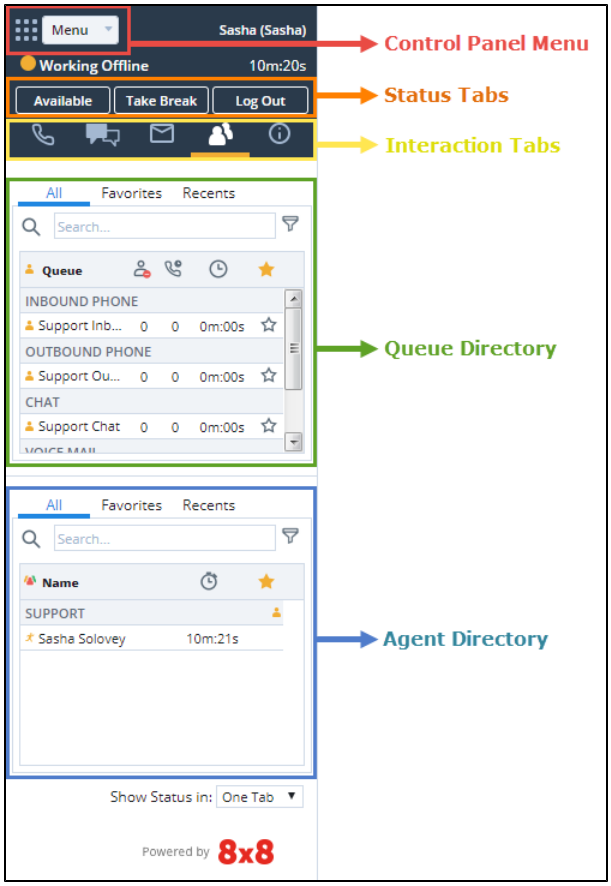
Understand Your Interface

The Agent Console interface is split into:

- **Control Panel**: Provides controls to process interactions in your contact center and to manage agent status. For a quick look at the Control Panel functionality, refer to the Agent Console Quick Start Guide.
- **Display Panel**: Provides access to CRM data, profile settings, agent directory (only available to Unified Login with Virtual Office users), and message recording settings.



The following table gives a summary of the Agent Console user interface:

Functional Area	Description
1. Control Panel  	Use the Agent Console Control Panel to access the controls and status information, process an interaction, and work with Agent Console tools. Inside the Control Panel, use the Status tabs to maintain your agent status. Agent Console dynamically adjusts the Control Panel tabs in response to the interaction type and task you are performing. For example, phone interactions are processed using the Phone tab. ■ **Phone tab**: allows agents to manage phone interactions. All call handling functions such as making calls, placing a caller on hold, conferencing and transferring calls are performed using the Phone tab. ■ **Chat tab**: allows agents to manage chat interactions from customers or from other agents. ■ **Email tab**: allows agents to accept and respond to emails. ■ **Status tab**: displays agents, and queue information such as the number of calls waiting, calls in progress, and the status of logged in agents in your group. ■ **Notices tab**: allows agents and supervisors to post and receive informational notices. The Control Panel menu offers the following action items: ■ **Profile**: allows agents to view or edit their Agent Console account settings. ■ **My Recording**: allows agents to record messages to be played to customers. ■ **Monitoring**: allows agents to display the Supervisor Console Queue and agent management tool in separate browser window. ■ **Report**: allows agents to display the Supervisor Console report selection and generation tool. ■ **External CRM**: allows agents to initiate an integrated External CRM session. ■ **CRM**: allows agents to access cases, customers, and tasks from the Local CRM. ■ **Collaborate**: allows agents to remotely connect to a customer

Functional Area	Description
	computer with remote desktop control options and Co-browsing capabilities. This features is available if your account includes the optional Collaborate feature. ■ **Co-browsing**: If subscribed to Co-browsing feature, agents can assist customers via a co-browsing session. Agents must enter the session ID communicated to them by the customer in order to establish the session. See Co-Browsing for more details. ■ **Help**: allows agents to provide access to FAQ questions, links to our user guides, and 8x8, Inc. Support. You can send your feedback directly; attach images or debug logs from the Help menu. ○ **FAQ**: allows agents to access frequently asked questions and answers for repetitive use. ○ **User Guide**: allows agents to access the product documentation and tutorial videos, and learn about the latest features in a separate window. ○ **Support**: allows agents to access our knowledge base, articles, videos, support telephone numbers, and live chat. ○ **Send Feedback**: allows agents to send product feedback and suggestions directly to our developers, and attach images or debug logs from the Help menu. See Send Feedback. **Note:** The **Collapse Window** button at the bottom of the Control Panel hides or shows the Display Panel. Chrome and Firefox do not support the Collapse Window functionality in Agent Console.
2. Display Panel	The Display Panel provides access to CRM data, profile settings, and message recording settings. The Display Panel opens with three default tabs and opens additional tabs for each menu action. ■ **Customers**: lists your open case records by customer. ■ **Cases**: lists your open case records.

Functional Area	Description
	■ **Tasks**: lists the tasks assigned to you. ■ **Directory**: displays the company directory that lists all extension users including Virtual Contact Center agents. See more details in Shared Directory. (This option is only available to Unified Login with Virtual Office users.) ■ **Monitoring**: allows supervisors to review and actively monitor agents, queues, groups, and campaigns.

Send Feedback

In Agent Console, the Help menu provides access to FAQs, links to our user guides, and 8x8, Inc. Support. You can send your feedback directly, attach images, or debug logs from the Help menu.

To send feedback:

1. Log in to Agent Console.
2. Go to **Menu > Help > Send Feedback**.
3. Select an option from the drop-down menu:
   - **Report a problem**
   - **Enhancement ideas**
4. Write a description and click **Attach a file**.
5. Choose an image file from your computer directory.
   You can also drag and drop the file to the attachment box.
6. Click **Submit**.
   A log file is automatically sent to our developers.

Disclaimer: While we rely on your feedback and suggestions to improve our products, we do not guarantee a response from our developers. As always, we are committed to serving you better.

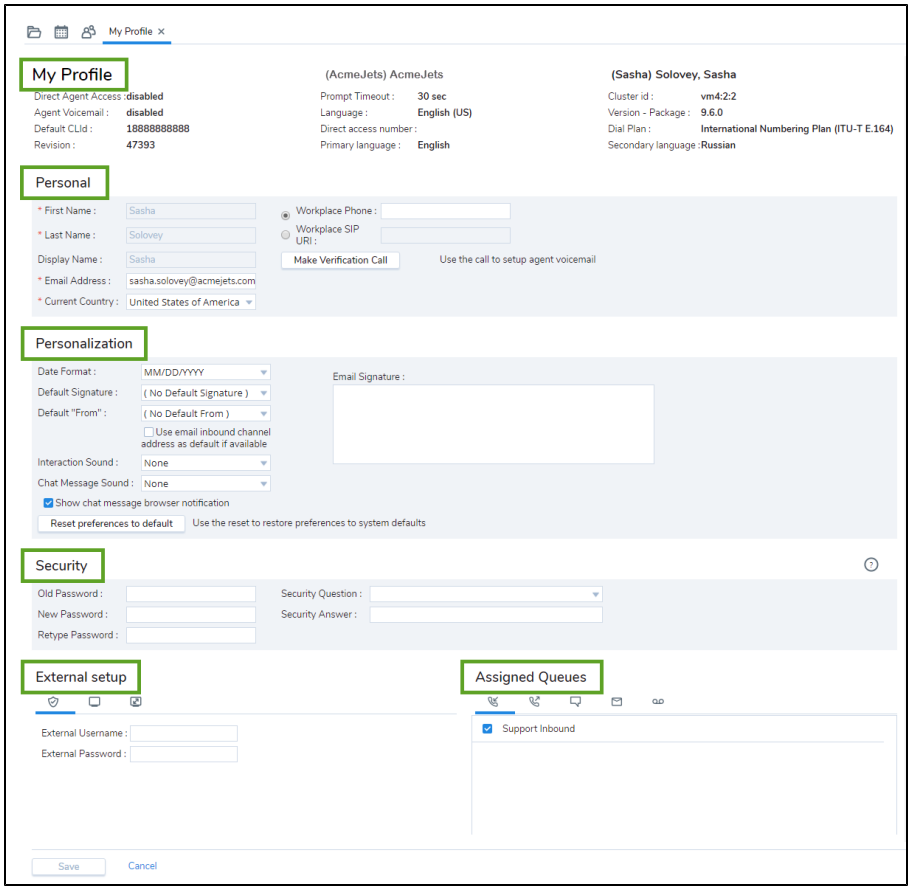
Configure Your Profile

Before configuring your account, the contact center's management team must define a standard configuration for each type of agent that works in the contact center. The contact center administrator can then use those standard configuration values to guide the use of the My Profile page in Agent Console to configure a given agent's account.

The information in My Profile is organized under the following areas:

- **My Profile**: Presents information on agent name, display name, tenant name, tenant label, and product version and revision.
- **Personal**: Lets you view or edit email address and phone number, and make verification calls to the specified number. You can save email addresses with up to 254 characters.
- **Personalization**: Allows you to personalize your Agent Console with notification sound alerts, and specify the date format, default signature, default email signature, and more.
- **Security**: Lets you change your password to log in. You can also select a security question and input an answer to use to reset a forgotten password in the future. (This feature is not available to Unified Login and Unified Login with Virtual Office users.)
- **External Setup**: Lets you define your login credentials to access your integrated External CRM.

- **Assigned Queues**: Specifies inbound and outbound phone, chat, email, and voicemail queues to which the agent is assigned.



Summary of Agent Profile Settings

The following table summarizes profile settings in Agent Console:

Agent Profile	Description
My Profile	The agent's name and ID used to log in to Agent Console are displayed. The following information is also presented under My Profile: ▪ **Direct Agent Access**: If enabled, the agent can be reached directly via **Direct Access Number**. ▪ **Agent Voicemail**: If enabled, the agent is able to receive voicemail via email. The voicemail is left by the customers who try to reach the agent directly.

Agent Profile	Description
	■ **Default CLId**: Displays the default caller ID for the agent's outbound calls. ■ **Revision**: Displays the Virtual Contact Center revision number. ■ **PBX #**: Indicates the system-assigned number, also known as the agent's extension number, used for agent-to-agent dialing. (This feature is available to Unified Login and Unified Login with Virtual Office users.) ■ **Agent DID**: Indicates the phone number or the DID of the agent. (This feature is only available to Unified Login with Virtual Office users.) ■ **Prompt Timeout**: Indicates the duration of an interaction offered to the agent before it goes back to the queue. ■ **Language**: Indicates the language of the Agent Console application. ■ **Direct Access Number**: Presents the extension number that can be used to reach the agent directly. Agents can communicate this number with their customers. ■ **Primary Language**: Indicates the primary language of the agent. Agents are assigned with a primary language and one or more languages of fluency used during multilingual customer chats. See Handling Multilingual Chats for more details. ■ **Cluster id**: The cluster ID is used for system diagnostics. Provide this number to your support technician for system troubleshooting. ■ **Version Package**: Displays the Virtual Contact Center version number. ■ **Dial Plan**: Represents the system dial plan such as International Numbering Plan (ITU-T E.164). Dial plans take numbers dialed by users or originated from other Virtual Contact Center components and apply editing rules to yield a valid number. ■ **Secondary Language**: Indicates the secondary language of the agent used during multilingual customer chats. It is a language of fluency picked by the agent and in addition to the agent's primary language. See Handle Multilingual Chats for more details.
Personal	■ **First Name**: Type the agent's first name. (This field is read-only for Unified Login and Unified Login with Virtual Office users.) ■ **Last Name**: Type the agent's last name. (This field is read-only for Unified Login and Unified Login with Virtual Office users.) ■ **Display Name**: If enabled, agents can enter a customized display name to present themselves. Having a display name helps agents save time and effort to introduce themselves to customers every time they start a new chat. The agent's display name also appears on the Control Panel, Profile page, chat window, and CRM case created after a chat session. The display name can be modified by both the Virtual Contact Center administrator

Agent Profile	Description
	in the Configuration Manager, or if enabled, by the agents in Agent Console. The changes immediately appear in both applications. ■ **Email Address**: Type the agent's email address. When the agent uses the CRM case management page to send an email, the agent can choose this email address as the **From** address for the message. Your email addresses can have up to 254 characters. (This field is read-only for Unified Login with Virtual Office users.) ■ **Current Country**: Select a country from the list, if enabled by the administrator. ■ **Workplace Phone**: Designated number to process interactions in Agent Console. It can be the agent's desk phone, cell phone, or any other phone. ■ **Workplace SIP URI**: Specifies the SIP Phone URI of a VOIP phone. The SIP URI resembles an e-mail address and is written in the following format: **SIP URI = sip:x@y:Port** where x is the username and y is the host (domain or IP). ■ **Make Verification Call**: Places a test call to the specified phone number for verification. On answering the verification call, you can set up a voicemail greeting.
Personalization	■ **Date Format**: Offers a choice of date formats to apply on all email notifications sent to and from the tenant. ■ **Default Signature**: Choose the default email signature used when sending email messages from the agent's account. When the agent uses the CRM case management page to send an email, the default signature appears as one of the choices in the Signature list. ■ **Default From**: Choose the default **From** address used when sending email messages from this account. When the agent uses the Local CRM to send emails to customers, the default address is automatically populated or appears as one of the choices in the **From** list. ■ **Interaction Sound**: Provides a choice of alert sounds to notify a new interaction. Select an interaction sound from the list and click **Play** to hear the notification sound. ■ **Chat Message Sound**: Provides a choice of alert sounds to notify a new chat interaction. Select an interaction sound from the list and click **Play** to hear the notification sound. ■ **Show chat message browser notification**: If enabled, the agent receives a browser notification on an incoming chat from customer. ■ **Reset preferences to default**: Use the reset button to restore preferences to system default. This option resets your visible columns, tabs, sounds, date format, notifications, and cases. It also clears favorite settings and Recents, and causes page to reload. See the list of the preferences that is saved on server. ■ **Email Signature**: Type the email signature for this account. When the agent uses the CRM

Agent Profile	Description
	case management page to send an email, the agent can choose to insert this Signature in the message.
Security	■ **Old Password, New Password, Retype Password**: By default, the current password is listed for all three fields. If an agent wishes to change the password, they should enter the old password and new password, and confirm the new password. Hovering over the symbol indicates the password length defined for Agent Console. (This field is not available to Unified Login and Unified Login with Virtual Office users.) ■ **Security Question, Security Answer**: Selecting a Security Question and answer in the profile ensures that the person requesting to reset the password is the one assigned with the agent account. (This field is not available to Unified Login and Unified Login with Virtual Office users.)
External Setup	If Agent Console has been configured to interoperate with a third-party CRM, you must enter the login credentials the agent uses to access the third-party CRM in **External Username** and **External Password**.
Assigned Queues	The agent's queue memberships (inbound, outbound, chat, email, and voicemail) are displayed in **Assigned Queues** by default. If the Virtual Contact Center administrator enables **Allow agent to change Enable/Disable settings in Assigned Queues** for an agent in Configuration Manager, the agent can use Assigned Queues to disable a queue's ability to offer interactions.

Change Your Workplace Number

Your contact center supervisor has configured your Agent Console account to conform with your contact center's technical requirements and company policy.

Virtual Contact Center allows you to use a hard phone, a cell phone, or a softphone (see Bria 4, Windows and Bria 4, Mac user guides) to process contact center interactions. The use of a hard phone requires a phone number, while the use of a softphone requires a SIP URI. Your administrator specifies this information when setting up your account and determines if you can change this information in your agent profile. The Workplace Phone, under My Profile, identifies the phone number you use to process Virtual Contact Center phone interactions. The Workplace SIP URI identifies

your softphone. Based on the configuration of your account, you may be able to edit your phone number and the SIP URI. Learn more.[1]

To change your Agent Console telephone number:

1. Click **Work Offline**.
   Agent Console makes you unavailable for new interactions.
2. Go to **My Profile**.
   Agent Console displays the profile configuration page.
3. Enter your **Workplace Phone** or **Workplace SIP URI** under **Personal**.
4. Click **Make Verification Call** to verify if the phone works.
   For information about valid telephone numbers, see How to Format Your Telephone Number Entries.

Note: If you do not have the permission to change your phone number or the SIP Phone URI, the two fields are disabled.

How to Format Your Telephone Number Entries

Based on the dial plan implemented for your tenant, you may need to prefix your phone number:

- In the United States, the telephone format must be:
  <1> <three-digit area code> <seven-digit phone number>
- Outside the United States, the telephone format must be:
  <Country Code> <phone number>
- The telephone entries may contain optional dashes, spaces, or parentheses.

The following telephone numbers are valid entries in the United States:

- 5102592675
- 15102592675

---

[1]Do not change your Agent Console phone number unless directed to by your supervisor. If your supervisor directs you to change your number, possibly to respond to an emergency or to enable you to work in a different location, navigate to your agent profile, in the Personal text entry area, enter the phone number and save the new settings . You may use a traditional land line telephone, an IP Phone, or a softphone. If you use a hardware telephone, enter the telephone number here. This could be your cell phone, home phone, or desk phone offering the flexibility to function as an agent from virtually anywhere. If you use a softphone, configure the softphone, and enter the SIP Phone URI here.

- 1-510-259-2675
- 1(510)259-2675

Configure Email Options

Your contact center supervisor has configured your Agent Profile to conform with your contact center's technical requirements and company policy.

To configure Agent Console email options, see Configure Your Profile.

Note: Do not change your Agent Console email settings unless directed to by your supervisor.

Configure Your External CRM

If your contact center is integrated with an External CRM, such as Salesforce or NetSuite, you can access your CRM account from your Agent Console by saving the login credentials necessary to access the account. Integrating with External CRM enables you to expand the capabilities of the Virtual Contact Center CRM, and to incorporate your existing CRM system data into your tenant's interaction processing workflow. The integration supports phone, voicemail, chat, and email channels allowing you to access data from External CRM through an integrated Agent Console.

Virtual Contact Center now provides out-of-the-box integration with:

- Salesforce
- NetSuite
- Zendesk
- Microsoft Dynamics

To enable your agent account for External CRM Integration:

1. Log in to Agent Console.
2. Go to **Profile**.
3. Scroll down to the **External Setup** area. See External CRM Setup Summary table for details.
   The **External Setup** provides three tabs:

- **Authentication Tab**: Allows agents to save CRM login credentials.
- **Screen Properties Tab**: Allows agents to define screen pop properties such as opening a new window for screen pop.
- **Window Properties Tab**: Allows agents to define size and position of the screen pop window.

> **Note:** The **Screen Properties** and **Window Properties** tabs are enabled only if the tenant administrator grants access privileges.

4. Enter your CRM username and password in the **Authentication** tab.

> **Note:** Salesforce requires you to add the security token to your password to authenticate access from an external application. Obtain your security token from the original Salesforce communication email or your Salesforce administrator.

5. Click the **Screen Properties** tab to view or change the settings.

> **Note:** The agent's ability to define screen pop window properties is available only for Salesforce, Zendesk, and Microsoft Dynamics integration.

6. Click the **Window Properties** tab to view or redefine the screen pop window properties.

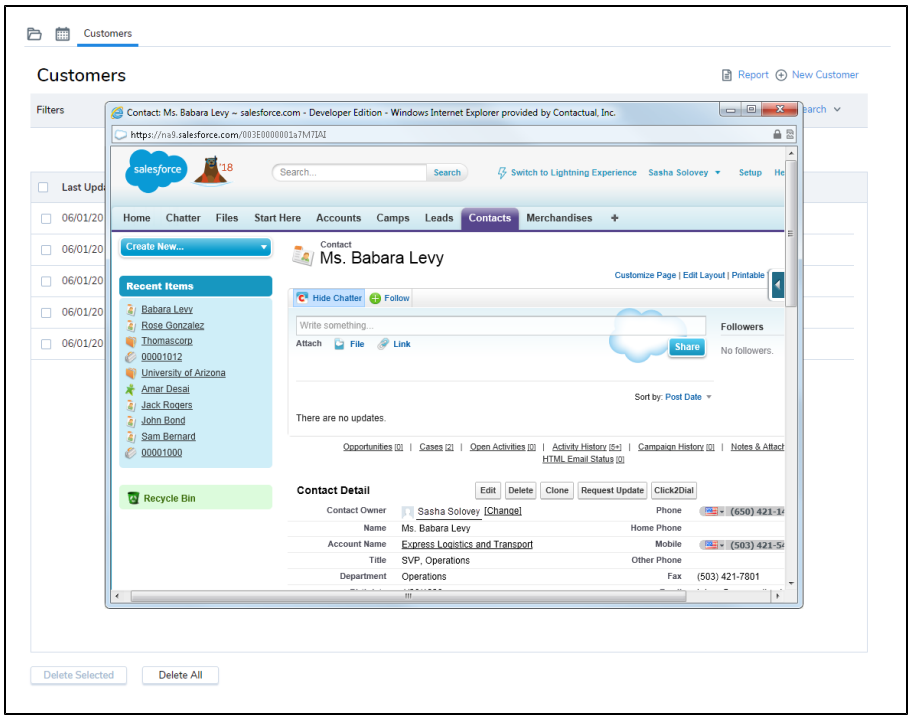
> **Note:** The agent's ability to define screen pop window properties is available only for Salesforce, Zendesk, and Microsoft Dynamics integration.

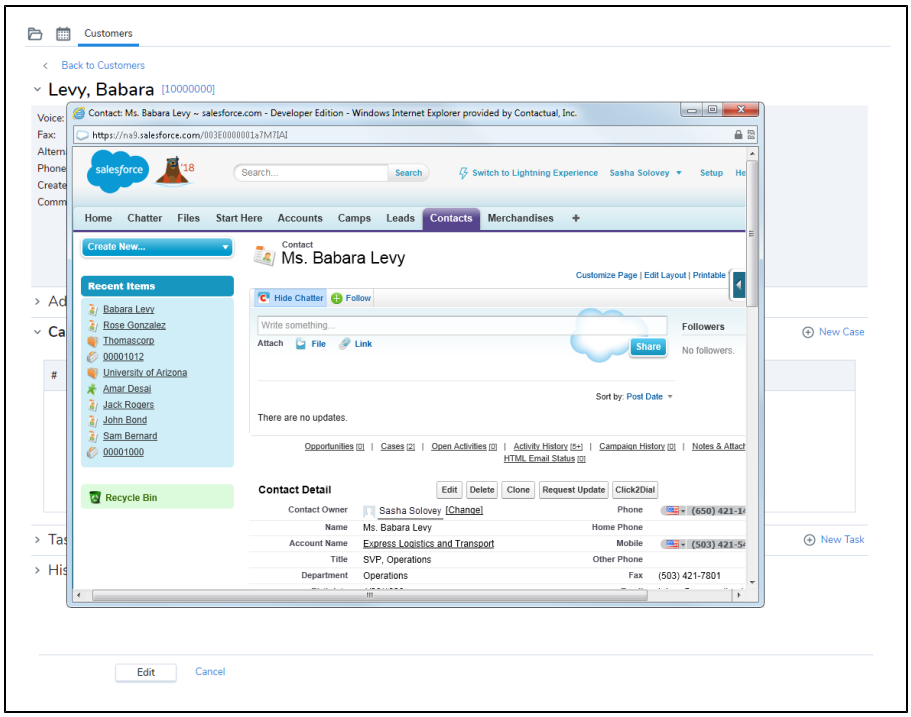
7. Click **Save**.
   Your settings help launch your External CRM from Agent Console.
   Your supervisor provides you with the information you need to access and work with your contact center's External CRM product.

External CRM Setup Summary

The following table summarizes External CRM setup options under the Agent Profile:

Functional Area	Description
Authentication Tab	■ **External Username**: Enter the username or login ID to log in to your External CRM. ■ **External Password**: Enter the password to log in to your External CRM.
Screen Properties Tab **Note:** This tab is enabled only if the tenant administrator grants access.	■ **Open new window for Screen Pop-up** This option allows agents to view interactions via screen pop in a standalone pop-up window instead of opening new tabs within Agent Console. If an interaction is connected to multiple records, a tab opens listing all matching records. You can click on a record to view the record details. If the option is disabled, launches the native CRM URL within Agent Console. Along with this option, two more options are available: ○ **Use single window only**: This option displays the screen pop in a new window and refreshes the same window to show new contact and call log information. If disabled, launches new contact and call log information in new windows. ○ **Hide result listing for single search result**: If an interaction fetches multiple matching records, a browser tab lists all matching records in a tabular format. Clicking on a record shows the record details. If this option is enabled, an interaction fetching a single matching record opens the record details in a new window and hides the result listing tab as shown below.

Functional Area	Description
	 If this option is disabled, the matching single record lists in a tab in addition to opening in a new window.

Functional Area	Description
	
Window Properties Tab **Note:** This tab is enabled only if the tenant administrator grants access.	**Show toolbar**: ■ Selecting Yes displays the Internet Explorer toolbar at the top of the standalone pop-up window. ■ Selecting No displays the window without the Internet Explorer toolbar. **Note:** Show toolbar is not supported on IE9. **Size and Position**: ■ In the text entry areas for width and height, enter the size of the screen pop window in pixels. ■ In the top and left text entry areas, enter the screen position of the screen pop window's upper-left corner in pixels.

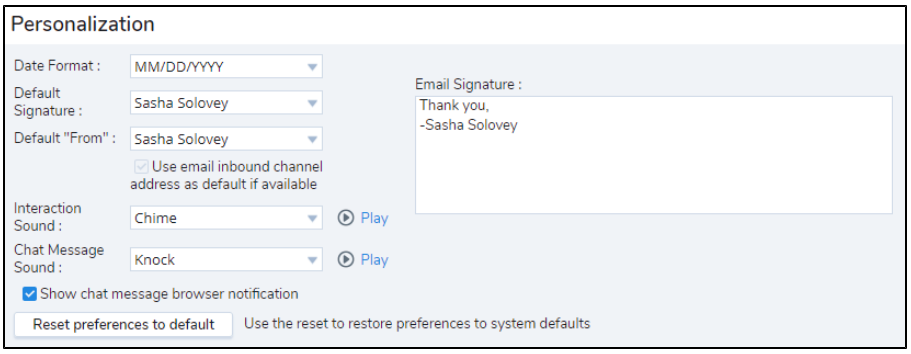
Personalize Your Console

You can personalize your Agent Console emails and chat by:

- Defining a date format for your communications, such as MM/DD/YYYY or DD/MM/YYYY.
- Creating a simple text-based signature, or a custom signature using HTML tags. If necessary, you can create multiple signatures but set up one as default for all your emails. You can insert a signature with a single click in your emails. See Insert Signatures in Description Box for details.
- Choosing a default From email address, or select the email address used for inbound channel as default.
- Choosing an interaction sound for an interaction. The Interaction sound is an audio alert that can be heard when an interaction is offered to you. Click **Play** to listen to the sound.
- Showing a chat message sound or chat message browser notifications when receiving a chat message. Click **Play** to listen to the sound.

To personalize your email and chat:

1. Log in to Agent Console.
2. Go to **Menu > Profile**.
3. Make changes in **My Profile > Personalization**.
4. Click **Save**.



Agents can save their preferences on the server and access them from a different computer or browser. Their favorites and most recent settings will be saved on the server for the next time they log in.

The following user preferences are saved on the server:

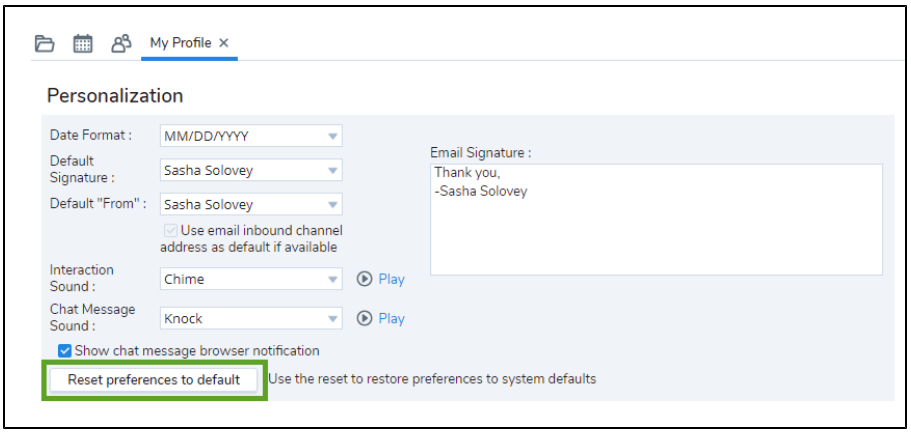
Feature	Details
Monitoring window state	▪ Last selected tab (Queue Management, Campaign Management, etc.)

Feature	Details
	■ Last selected main filter on each tab (Real time, Last 30 Min, etc.) ■ The last selected agent if the active tab is Agent Management ■ The last selected queue if the active tab is Queue Management ■ The last timezone selected
Menu > Report > Historical Report	The **Do not display this message again** check box
Chat > Pop-up chat	Chat pop-up size, sort specifiers, and window position
Menu > Help > FAQ	FAQ window size, list of favorite, list of Recents
Customer's tab > Report > Search	Favorites and Recents in Search window
Phone > Options > Dial Pad	The Long tone check box
List of recent Virtual Office contacts	Maximum 20 contacts
Call tab	Click to see the list of called numbers from the phone field. The called numbers appear on the list.
Queues Panel	■ Last selected tab (All, Favorites or Recents) ■ Favorites queues ■ Recent queues ■ Sort by queue name, longest waiting etc.. (All 3 tabs - All, Favorites and Recents)
Agents Panel	■ Last selected tab (All, Favorites or Recents) ■ Favorite agents ■ Recent agents ■ Sort by status, agent name, duration etc. (All 3 tabs - All, Favorites & Recents)
One tab or two tabs	The last selected tab (Queues or Agents Status) is remembered.

Best Practice: If you do not like to keep your changes for the next time, reset your preferences to default before you log out.

To reset your personalized settings to system default:

1. Log in to Agent Console.
2. Go to **My Profile** tab.



3. Click **Reset Preferences to default**.
4. Click **Yes** to confirm.
   This option resets your visible columns, tabs, sounds, date format, notifications, and cases. It also clears favorite settings and Recents, and causes page to reload. See the Preferences table.

View Your Assigned Queues

Your contact center supervisor has assigned you to one or more queues. You can process interactions from these queues.

In the My Profile page, the Assigned Queues area lists the queues that are assigned to the agent, grouped by media such as inbound, outbound, chat, email, or voicemail.

If you have the required Agent Console account permissions, you may block interactions from a queue by opting out of queue assignments as directed by your contact center supervisor.

To opt out of a queue assignment:

1. Go to **My Profile > Assigned Queues**.
2. Select the desired media tab such as Inbound, Chat, or Email.
3. Clear the queue assignment check box in My Profile.
4. **Save** changes to your profile.
   Interactions from this queue are not offered until enabled again.

Set Your Status

Virtual Contact Center allows you to change your status by selecting a status button in the Control Panel. When you are logged in to Agent Console, you may or may not be ready to accept new interactions. Choose a status that fits your situation:

- **Available**: In the Control Panel, click Available to receive new interactions and access all features. In this status you can use tools while waiting for a new interaction, and Agent Console is permitted to offer you new interactions. Agent Console automatically changes your status to **Busy** or **In Progress** when you:
  - Accept an incoming interaction.
  - Place an outbound call through a queue.
- **Busy or In Progress**: When your Agent Console status is Busy or In Progress, you are unavailable to receive new interactions. The amount of time you are allotted to accept an offered interaction is specified by your contact center administrator when he or she configured the contact center. When you are Busy or In Progress, Agent Console enables you to access all Agent Console tools.

  Note: The Configuration Manager administrator can allow agents to handle up to six chats with customers or an unlimited number of chats with other agents of the same tenant and at the same time.

- **Post-Processing**: When you complete an interaction, Agent Console automatically changes your status to Post-Processing. When your status is Post Processing, you are unavailable to receive new interactions. Use the Post Processing interval to perform any tasks required to finalize the interaction. The amount of time you are allotted to perform Post Processing is specified by your contact center administrator when they configure the contact center.

Note: If you do not route an outbound call through a queue, your status remains unaffected. If your status is Available while placing an outbound call, you are open for incoming interactions.

- **Working Offline**: In the Control Panel, click **Work Offline** to prevent Agent Console from offering you new interactions, but you can retain the ability to access all features. Change your status to Working Offline, if you are processing the current interaction, updating the CRM data for a previously received interaction, or taking a break. Regardless of why you are Working Offline, Agent Console is not permitted to offer you a new interaction.
- **Take Break**: In the Control Panel, click **Take Break** to become unavailable to receive new interactions, and disable access to all features.
- **Log Out**: When you choose this status, you are logged out of Agent Console and do not receive any interactions.

The following table gives a summary of Agent Console tools and options available for each type of agent status:

Agent Status	Description	Where to access?	Receive new interactions	Available statuses
Available	The agent is available to receive new interactions.	Click **Available** in the Control Panel.	Yes	■ Work Offline ■ Take Break
Busy, In Progress	The agent is busy handling a queued interaction.	Automatically changes as soon as the agent accepts a queued interaction.	No	No other status is available during the **Busy** status until the agent finishes the transaction.
Post Processing	The agent has ended an interaction and is preparing to wrap up.	Automatically changes to Post Processing as soon as the agent ends the interaction.	No	No other status is available until the **Post Processing** time is out. The time is determined by your contact center administrator.
Working Offline	The agent is not available to receive new interactions, but all the features are enabled and accessible.	Click **Work Offline** button in the Control Panel.	No	■ Available ■ Take Break ■ Log Out
Busy (Stop	The agent has accepted a chat and	Click **Stop new** offered during	No	No other status is avail-

Agent Status	Description	Where to access?	Receive new interactions	Available statuses
New)	chooses to stop new interactions to wrap up the chat session that is already in progress. This status blocks all queued interactions to this agent.	Busy status. This button is only visible when the agent is handling a chat interaction. To receive more chats, click **Resume**.		able during the **Busy** status until the agent finishes the transaction.
On Break	The agent is not available to receive new interactions. Access to all features is disabled.	Click **Take Break** in the Control Panel. You are automatically placed on break when you reject a queued interaction. **Note:** The Control Panel becomes unavailable when the agent changes the status to On Break.	No	■ Available ■ Work Offline ■ Log Out

Administer Contact Center

Your contact center administrator can configure specific Supervisor Console accounts to include access to supervisor tools.

Agent Console accounts with access to supervisor functions are referred to as Supervisor Console accounts. The topics in this section focus on the use of Supervisor Console features.

Supervisor accounts have exclusive access to the following Supervisor Console features that are not enabled for non-supervisor agent accounts:

- Access Virtual Contact Center Analytics
- Create and edit FAQs
- Create historical reporting
- Monitor agents, queues, and groups

In addition to supervisor features, supervisors may choose to perform or guide and validate the use of certain operations that agents have access to, such as agent profile configuration. These include the following agent-optional abilities to:

- Delete customer and case records from the Local CRM
- Pull and delete pending email interactions from a queue
- Use the Monitoring tab to remove agents from queue assignments

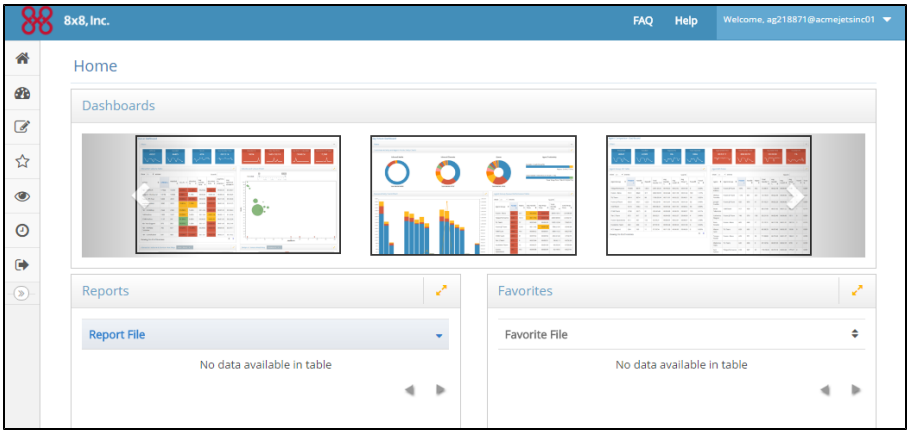
Access Virtual Contact Center Analytics

Supervisors and agents can launch 8x8 Virtual Contact Center Analytics from Supervisor Console, eliminating the need for a separate login. 8x8 Virtual Contact Center Analytics is a new generation tool that extracts raw contact center metrics and presents data in easily comprehensible visual charts. Virtual Contact Center Analytics provides industry-leading insights about the performance of your contact center. It is a web-based tool that provides enterprise-level

analytics and democratization of information that can be used to make highly informed business decisions. This suite of services deliver easy to use, customizable and rapid insights into the historical and real-time information associated with contact center agents, queues, and channels. Granular details are available from a highly scalable data platform and can be viewed in a graphical or tabular format on any device. The reports are also exportable into Excel or CSV for further evaluation and archiving.Virtual Contact Center brings powerful graphical tools that reveal actionable business information. Virtual Contact Center Analytics goes beyond traditional call center reporting. You can track the performance of your agents and contact center, and see how your customers are being served across all channels.

To access Virtual Contact Center Analytics:

1. Log in to Supervisor Console.
2. Click in the Control Panel.
3. Select **Business Intelligence** to launch the 8x8 Virtual Contact Center Analytics tool.
   The dashboard launches in a separate browser window.



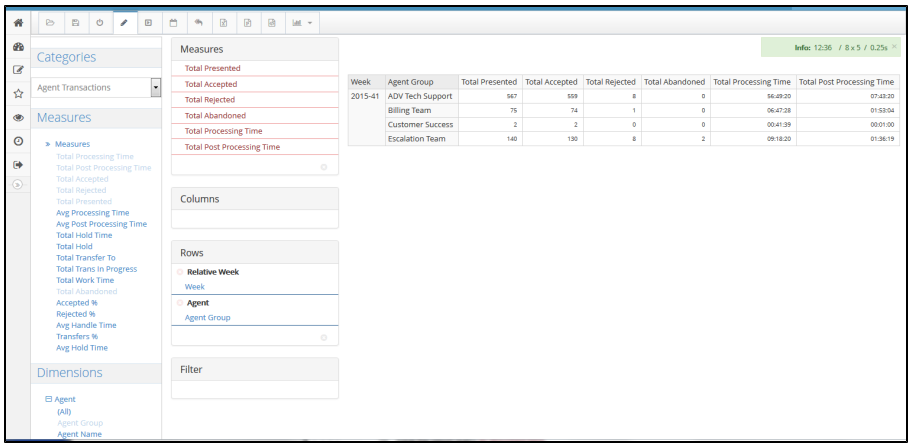
4. Use the navigation menu on the left to access dashboards and create custom reports.
   For details on the capabilities of this tool, refer to the Virtual Contact Center Analytics Guide.

To create an agent-based report:

Agents can create reports only for themselves, but supervisors can create a report for the agents they supervise.

1. Go to **Create Reports** from the navigation menu.
2. Click the drop-down and select **Agent Transactions**.
   All the available metrics for agents show up in Measures.
3. Select the desired metrics such as Total Accepted, Total Rejected, Total Processing time etc.
4. Select the desired agent groups by adding Agent Group in Dimensions.

5. Then select a time range for the report such as a desired day, week, month, quarter, or year in Dimensions.
6. Click to run the report. The report appears in a table.



Create and Edit FAQ Content

Due to the repetitive nature of inquiries handled by contact center agents, building an FAQ (Frequently Asked Question) knowledge base for the most frequently-asked questions saves agents time in fetching responses for customers. Whenever a customer seeks information, agents can refer to the FAQ knowledge base and provide information quickly. Agents can embed FAQ content in a chat interaction or an email. Your contact center administrator can publish this FAQ knowledge base on your website for broader access.

Virtual Contact Center allows supervisors to build FAQs. You can enrich FAQ content by embedding images or attaching files. Build the FAQs once, and refer to them, time and again.

Note: Virtual Contact Center limits the ability to create FAQs to supervisors. Agents do not have the privileges to create or edit FAQs.

Building content for FAQs requires you to:

- Create FAQ Categories
- Create FAQ Answers

For details about inserting FAQ answers into an email or chat, see Insert FAQ Responses into Emails, and Insert FAQ Responses into Chat Interactions.

Create FAQ Categories

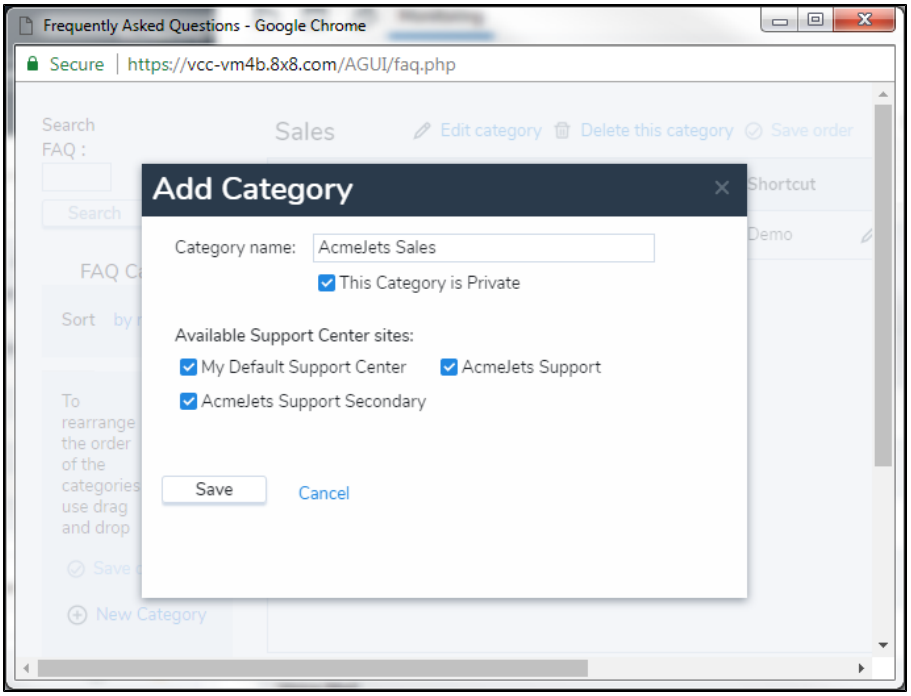
FAQ categories serve as containers for one or more FAQ answers. Before you can create the first FAQ, you must create the containing category.

To create an FAQ category:

1. Log in to Supervisor Console.

   Note: The privilege to create and edit FAQs is limited to supervisors.

2. From the Control Panel menu, select **Help > FAQ**.
   Supervisor Console displays the **Frequently Asked Questions** window.
3. In the **Frequently Asked Questions** window, click **New Category**.
   Supervisor Console displays the **Add Category** dialog box.



4. In the **Add Category** dialog box, enter the name of the FAQ category. Then, you can do the following:
   - To prevent Virtual Contact Center from displaying this FAQ category in any of your Support Centers, select **This Category is Private**.
     Private FAQ categories can only be accessed by contact center agents, not on a customer-facing Support

Center Web page.

- For FAQ categories that are not private, select the necessary check boxes to specify Support centers that display the FAQ category.

5. Click **Save**.
   The new FAQ category appears in the list of FAQ categories.

Edit or Delete FAQ Categories

To edit an existing FAQ category:

1. Go to the **FAQ** window in Supervisor Console.
2. Click **Edit Category**.
   The **Edit Category** dialog box opens.
3. Make the desired changes in the category, and save.

To delete an FAQ category:

Before you can delete an FAQ category, you must delete all FAQ answers defined within that category.

1. Log in to Supervisor Console.
   Only supervisors can create or edit FAQ categories.
2. In the Control Panel menu, click **Help > FAQ**.
   Supervisor Console displays the **Frequently Asked Questions** window.
   For details, see Create FAQ Answers.
3. In the **Add FAQ Category** window:
   a. In the list of FAQ categories, click a category.
   b. In the list of FAQ answers, for each answer contained in the FAQ category, click **Delete**.
   c. In the confirmation box to delete, click **OK**.
4. After deleting all FAQ answers contained in the FAQ category, in the list of categories on the left, click **Delete**.
5. Click **OK** in the delete confirmation dialog box.
   Supervisor Console deletes the selected FAQ category.

Create FAQ Answers

Define a frequently-asked question and response for your contact center knowledge base. FAQs serve as resources to agents assisting customers. Your contact center may also publish the FAQ resource on your company's support center website. You must add the FAQ answers to the FAQ categories.

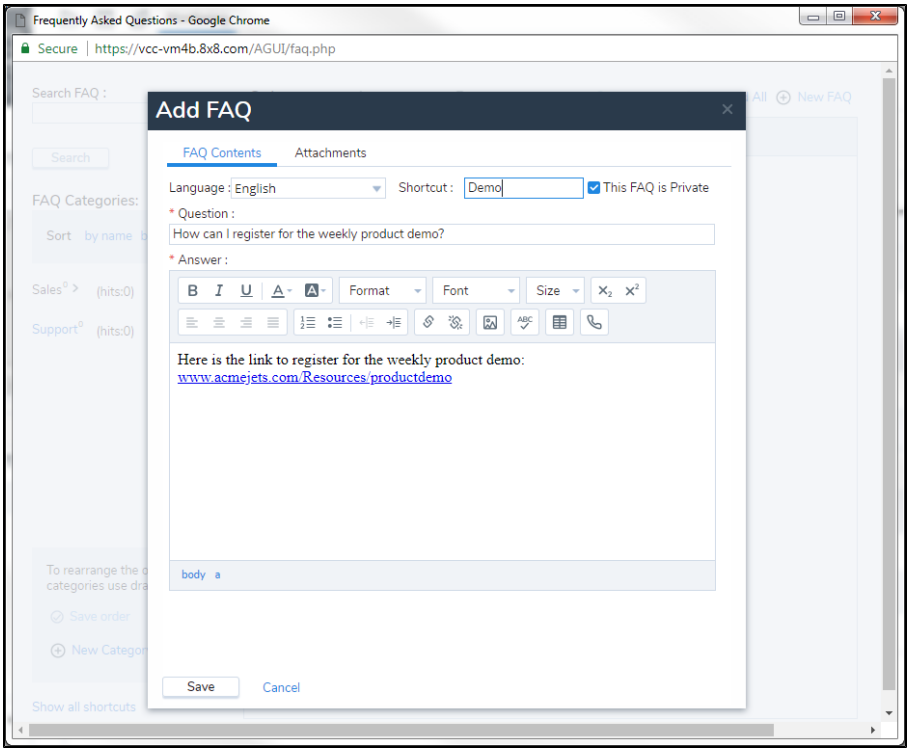
Before You Begin

Only supervisors can create or edit FAQ categories and answers. Make sure you have defined an FAQ category. For details, refer to Create FAQ Categories.

To create an FAQ answer:

1. Log in to Supervisor Console.
2. From the Control Panel menu, click **Help > FAQ**.
   Supervisor Console displays the **Frequently Asked Questions** window.
3. Select an FAQ category from the panel on the left, or click **+New Category** to create a new one.
4. Click **+New FAQ** in the right panel.
5. In the **Add FAQ** dialog box:
   - In the **Shortcut** text entry area, enter a shortcut that agents can use to quickly insert the answer to the FAQ into an email or chat.
   - In the **Question** text entry area, enter a frequently asked question.
   - In the **Answer** text entry area, enter the answer to the frequently asked question. The character limit for your FAQ is up to 40k.
     For information about inserting FAQ answers into email or chat responses, see Insert FAQ Responses into Emails, and Insert FAQ Answers into Chat Messages.
   - To prevent Virtual Contact Center from displaying this FAQ answer in any public Support Center, select **This FAQ is Private**.
     Private FAQ categories can only be accessed by contact center agents, not on a customer-facing Support Center Web page.
6. Embed any supporting data, such as images or attachments. For details on how to embed images or attach files, see Enrich FAQ Content.

7. Click **Save**.



Supervisor Console displays the **Frequently Asked Questions** window. The new FAQ answer appears in the category's list of FAQ answers.

The rich text editor for FAQ definition allows you to define visually appealing content with intuitive editing abilities. For details a summary of elements in rich text editor, refer to Menu Elements of the Rich Text Editor.

Enrich FAQ Content

You can add images or files to an FAQ response with just a few clicks.

To embed images in an FAQ response:

1. Click  from the rich text panel.
2. At the URL prompt, specify the URL location of the desired image and enter a descriptive name for the image in the **Alternative Text** box. Alternatively, you can drag and drop your images or paste them from your clipboard quickly. When you embed a high resolution image in your case, a follow-up, or an FAQ, they are compressed automatically for faster processing and for saving bandwidth. If needed, open the **Image Properties** dialog box from the right-click menu to adjust the image size.

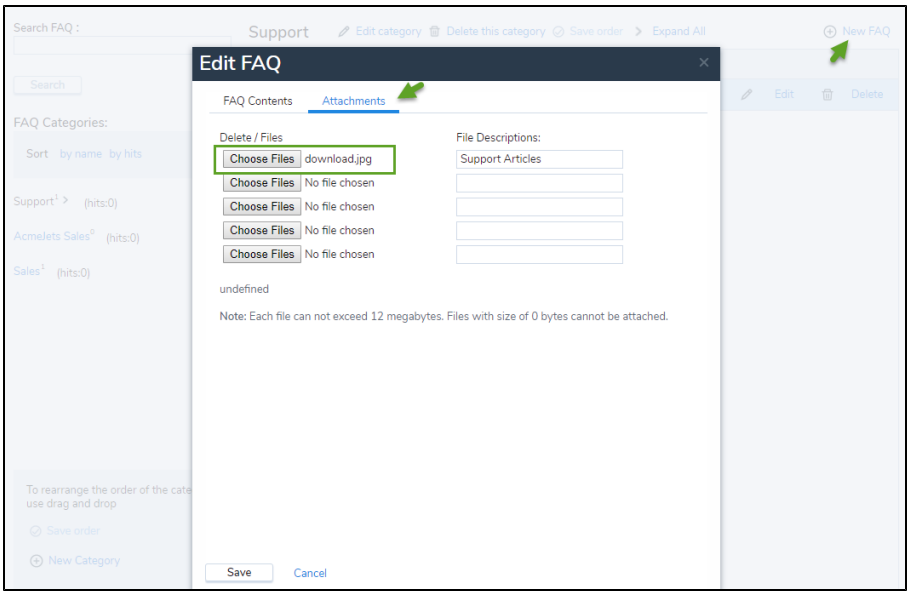
Note: The image to embed must be hosted on a web server.

The image gets inserted in the FAQ response.

Known Issue: Copying (Ctrl-C) and pasting (Ctrl-V) images is currently not supported on Internet Explorer 11. You can drag and drop the images.

To attach files:

1. Click the **Attachments** tab in the FAQ definition.
2. Browse and upload files stored locally.



Monitor Agents, Queues, Groups, and Campaigns

Supervisors can use the Monitoring tab in Supervisor Console to review and actively monitor agents, queues, groups, and campaigns.

Real-time monitoring and reporting provides critical contact center metrics and gives supervisors an ability to manage their call center agent teams effectively. Authorized supervisors can monitor live agent and customer interactions by barging in.

Authorized supervisors are able to see in real time the status of their contact center through a web browser; their Service Levels vs. Goal, the number of calls in progress, the number of calls waiting, the longest-waiting interaction per queue or skill, and real-time agent status graphs indicating the percentage of time in various states, such as on call, waiting, wrap up, on break, and more.

Supervisors have the ability to monitor only a given group of agents and queues.

Benefits

- Complete visibility into your call center operations
- Customer service quality assurance

Set up Monitoring

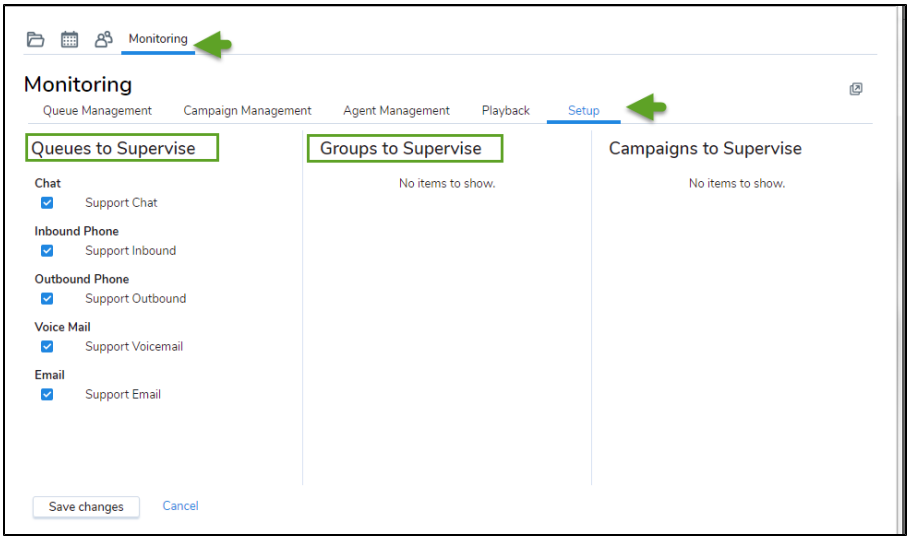
You can closely monitor the activity level of queues and agent groups you supervise in real time. Your contact center administrator defines your supervisory assignments. You have the flexibility to opt in and out of these assigned queues, groups, and campaigns.

To set up queues and groups to monitor:

1. Log in to Supervisor Console as a supervisor.
   Only supervisor accounts can access the Supervisor Console monitoring features.
2. From the Control Panel menu, click **Monitoring**. If configured by your administrator, the **Monitoring** tab also appears along with other Local CRM tabs.

Note: Supervisors can open the Monitoring window in a separate pop-up window. Click on top-right corner of the Supervisor Console Monitoring window for the pop-up window to open. To go back to the Monitoring window inside Supervisor Console, click again.

3. In the **Monitoring** window, click the **Setup** tab.
   Supervisor Console lists the queues and groups you are allowed to monitor.



4. Select the queues and groups you want to monitor, then click **Save Changes**.
   The Supervisor Console applies your settings.

Monitor Queues

Monitoring a queue allows you to obtain the metrics of each queue from the beginning of the day, for the last 30 minutes, or in real time. For each queue supervised, you can obtain statistics on the:

- Number of interactions that entered the queue
- Number of interactions accepted by agents
- Number of abandoned interactions
- Average wait time
- Average processing time
- Targeted service level
- Current service level

The following table lists and describes the data available in Queue Management:

Field	Description
Time Zone	Select from the available time zones when monitoring queues and agents as a supervisor. The Time Zone appears under **From beginning of day** only.

Field	Description
Queue	Lists all the queues monitored by you categorized by media.
#Entered	Number of interactions that entered the queue from the beginning of the day, or in the last 30 minutes.
#Accepted	Number of interactions accepted by agents the queue from the beginning of the day, or in the last 30 minutes.
#Abandoned	Number of interactions abandoned. ■ An abandoned interaction is an inbound phone call, or a chat that enters the queue but is not accepted resulting in the customer terminating the interaction. ■ An email is considered abandoned when an agent pulls emails but deletes them before opening. An abandoned interaction may also result from a faulty IVR flow.
Average Wait	Average waiting time for an interaction before being processed.
Average Processing	Average time taken to process an interaction from the time it is accepted until post processing.
SLA - Activity	The current activity level for the queue.
SLA - Target	The targeted service level for the queue.
SL Wait Time	the Service Level time limit before which the targeted percentage of interactions should be processed.
Busy	Number of interactions currently being processed by agents. This is applicable to real time statistics only.
Waiting	Number of interactions waiting in each queue to be processed.
Longest Wait	The longest waiting time for an interaction.

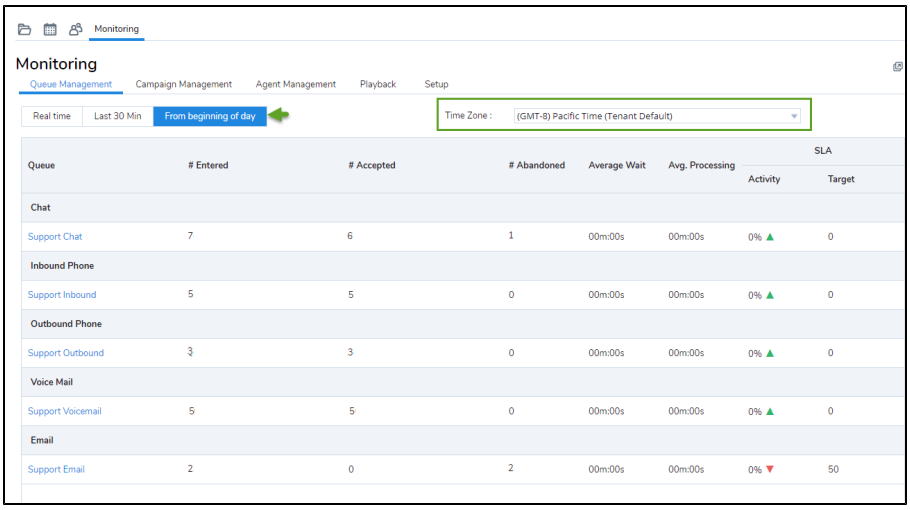
An abandoned interaction is an inbound phone call, or a chat that enters the queue but terminated by the customers before being accepted by an agent. An email is considered abandoned when an agent pulls emails but deletes them before opening. An abandoned interaction may also result from a faulty IVR flow. The Queue Management tab in the Monitoring window provides statistics on the abandoned interactions in the last 30 minutes or from the beginning of the day for each queue.

To monitor a queue:

1. Log in to the Supervisor Console as a supervisor.
   Only supervisor accounts can access the Supervisor Console monitoring features.
2. From the Control Panel menu, click **Monitoring**.
   If configured by your administrator, the **Monitoring** tab also appears along with other Local CRM tabs. The Monitoring window opens.

Note: Supervisors can open the Monitoring window in a separate pop-up window. Click on top-right corner of the Supervisor Console Monitoring window for the pop-up window to open. To go back to the Monitoring window inside Supervisor Console, click again.

3. Go to the **Queue Management** tab.
   Supervisor Console lists the queues you selected in the **Setup** tab.



4. Select **Real time**, **Last 30 Min**, or **From beginning of day**.
   Each option provides a set of monitoring options.
5. You can choose a different **Time Zone** if you have selected **From beginning of day**.
6. Click a queue name to display the agents for that queue.
7. In the list of agents assigned to a queue, click an agent to display a summary of that agent's activity such as skill level, current status, and time on status.

Notes:
-The monitoring data is updated even when the supervisor status is **Break**.
-The last monitoring configuration before the supervisor logs out is saved and presented when they log back in.

Monitor Campaigns

Supervisors assigned with monitoring privileges can control and monitor campaigns by tracking the real-time status of each campaign. The Campaign Management tab also provides an overview of campaign calls.

Based on your privileges set by the administrator, you can:

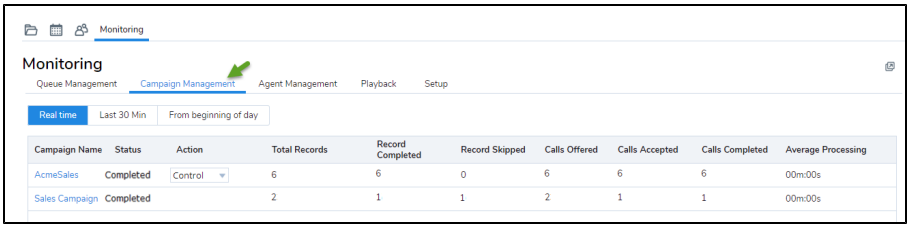
- **Monitor campaigns**: Allows you to track real-time statistics of campaigns and view campaign details, such as start and end time, daily calling schedule, and Retry attempts.
- **Control Campaigns**: Allows you to start, pause, purge, and end campaigns.

To access the Campaign Management tab:

1. Log in to the Agent Console as a supervisor.
   Only supervisor accounts can access the Supervisor Console monitoring features.
2. From the Control Panel menu, select **Monitoring**. If configured by your administrator, the **Monitoring** tab also appears along with other Local CRM tabs.

> **Note:** Supervisors can open the Monitoring window in a separate pop-up window. Click on top-right corner of the Supervisor Console Monitoring window for the pop-up window to open. To go back to the Monitoring window inside Supervisor Console, click again.

3. In the **Monitoring** window, click the **Campaign Management** tab.



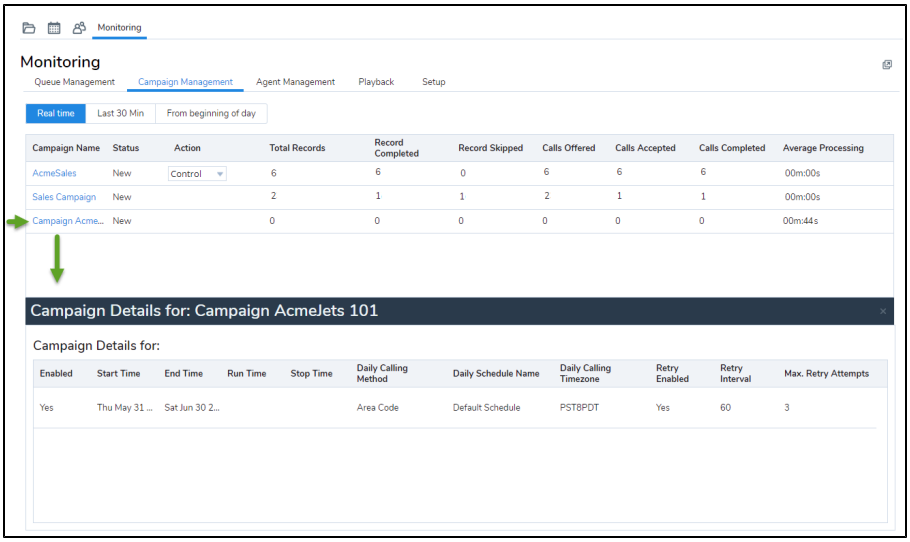
The **Campaign Management** tab presents the following information about campaigns:

Campaign Details	Description
Campaign Name	Campaign name defined by the administrator.

Campaign Details	Description
Status	Campaign status indicates if the campaign is completed or running.
Action	Action allows you to start, schedule, or stop a campaign. ■ **Start**: Starts a campaigns immediately. ■ **Schedule**: Starts a campaign on schedule defined by the administrator. ■ **Stop**: Stops a campaign immediately.
Total Records	Total number of records fetched by the campaign manager from the data source.
Records Completed	Total number of records completed by the campaign. A record is considered completed if calls generated for the record are accepted and completed by one or more agents, and no more retries are scheduled, or the number of retry attempts has reached the maximum allowed.
Records Skipped	A record is considered skipped if a call generated for the record is skipped by an agent. There will be no more call generated by the record.
Calls Offered	Total number of calls been offered to an agent. If the same call/interaction is offered to multiple agents multiple times, the count of calls offered does not increase, since the offer event belongs to the same call.
Calls Accepted	Total number of calls accepted by agents.
Calls Completed	Total number of calls accepted and processed by agents. This statistic includes retry calls.
Average Processing	Average time for completing a call, including the post-processing time.

4. Click one option:
   - **Real Time** for real time status and statistics of campaigns.
   - **Last 30 Min** for status and statistics of campaigns in the last 30 minutes.
   - **From beginning of day** for status and statistics of campaigns from the start call time of the campaign for the day.

5. Click any campaign to view brief details of the campaign.



Notes:

-The monitoring data is updated even when the supervisor status is **Break**.

-The last monitoring configuration before the supervisor logs out is saved and presented when they log back in.

Monitor Agents

As an authorized supervisor, you can track agent status in real time, for the last 30 minutes, or from the beginning of the day. Moreover, you can barge into active calls between agents and customers (Agent Whisper), or eavesdrop on a conversation between an agent and a customer (Automatic Monitoring). The Agent Management tab in the Monitoring window provides the following options for monitoring:

- View the current status, time in the status, duration since logged in, time spent processing interactions, and more.
- Access real-time agent status graphs indicating the percentage of time in various states, such as on call, waiting, wrap up, on break, and more.
- Monitor live agent and customer interactions by barging into calls.
- Monitor agent performance by accessing the audio recordings of the agent's phone interactions.

The following table summarizes the data available for monitoring agents in real time:

Agent Management	Description
Time Zone	Select from available time zones when monitoring queues and agents as a supervisor. The Time Zone appears under **From beginning of day** only.
Agent	Lists all the agents monitored by you.
Current Status	Current status of agents.
Status Code	Status code indicating the reason for current status. For example: Working offline to wrap up case work. Available if your contact center subscribes to status codes.
Time on Status	The duration in the current status.
Phone Line 1	Shows if an agent is on the live call on Phone line 1.
Phone Line 2	Shows if an agent is on the live call on Phone line 1.
Active Queues	Number of queues an agent is active.
Last Login	The time at which an agent logged in. Shown in tenant time zone.
Total Time Login	Total duration of login since the beginning of the day by tenant time zone.
Total Time Trans-action	Total time spent on handling interactions.
Maximum Con-current Chats	Shows the maximum concurrent chats allowed for an agent.
Active Customer Chats	Shows the number of active chats for an agent.

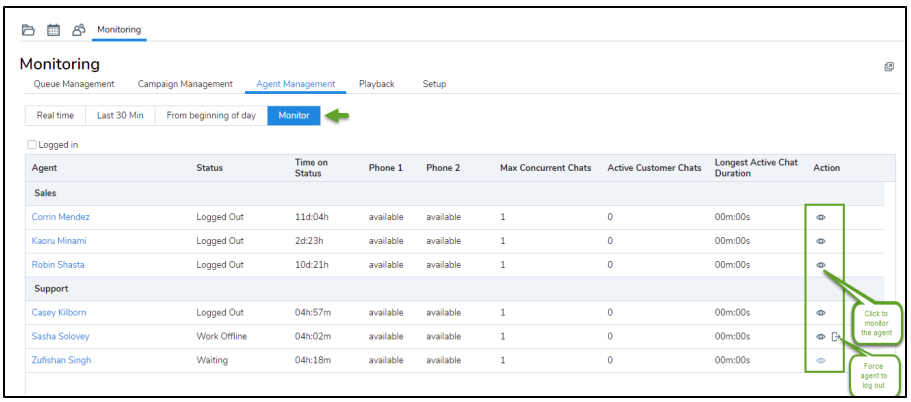
To monitor agents:

1. Log in to the Supervisor Console as a supervisor.
   Only supervisor accounts can access the Supervisor Console monitoring features.
2. From the Control Panel menu, click **Monitoring**. If configured by your administrator, the **Monitoring** tab also appears along with other Local CRM tabs.
   The **Monitoring** window opens.

Note: Supervisors can open the Monitoring window in a separate pop-up window. Click on top-right corner of the Supervisor Console Monitoring window for the pop-up window to open. To go back to the Monitoring window inside Supervisor Console, click again.

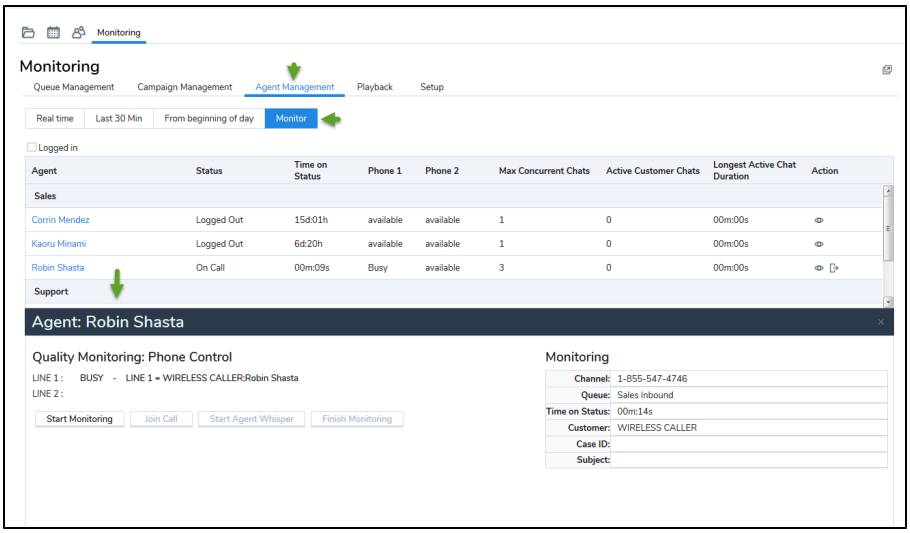
3. Click the **Agent Management** tab.
   The Supervisor Console lists the groups you selected in the **Setup** tab.
4. To begin monitoring, click **Monitor** in the header area.

   For agents on live calls, is enabled under the **Action** column.
5. Select an agent you wish to monitor and click under the **Action** column.



   OR
   Click an agent's name to view the monitoring controls.
6. Click **Start Monitoring**.
   Your supervisor phone rings.
7. Accept the call to listen in.

8. Perform one of the following tasks:
   - To end monitoring the call, click **Finish Monitoring**.
   - To participate in the call, click **Join Call**. End the call when done.



Notes:
-The monitoring data is updated even when the supervisor status is **Break**.
-The last monitoring configuration before the supervisor logs out is saved and presented when they log back in.

Agent Whisper

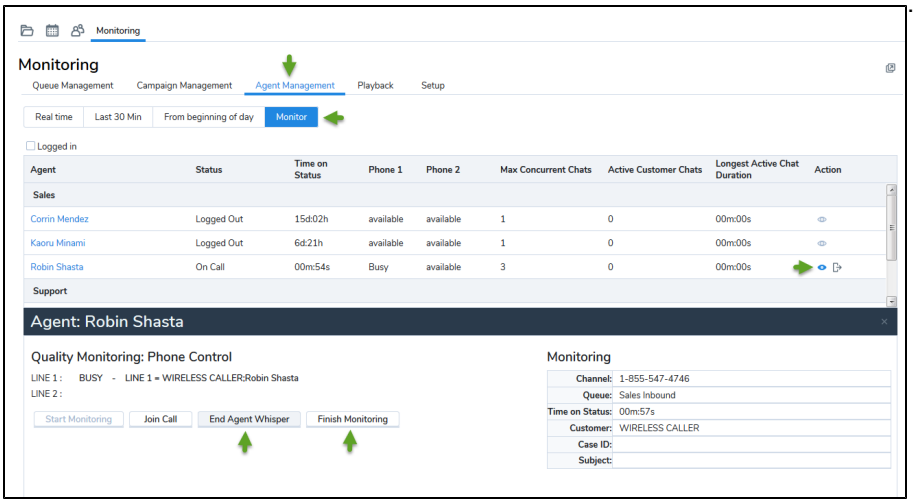
We have now introduced the ability for contact center supervisors to barge in on active calls between agents and customers, listen in, or coach or train agents live with Whisper feature. Supervisors can begin monitoring a live call handled by an agent any time during the call, and speak to agents by initiating a one-on-one private conversation with the agent. The customer on call does not hear this conversation.

To whisper during monitored calls:

1. Click **Monitoring** from the Window Menu in Supervisor Console.
2. In the **Monitoring** window, select **Agent Management** tab. It lists all the agents you have permission to monitor.
3. Select the agent you wish to monitor and click **Monitor**.

4. In the **Monitoring** window, click icon next to the agent to begin monitoring.

   If the agent is on a call, you can listen in.
5. Click **Start Agent Whisper** to whisper to the agent. The agent hears a beep, signaling the whisper session.
6. To end whisper, click **End Agent Whisper**.
7. Click **Finish Monitoring**.



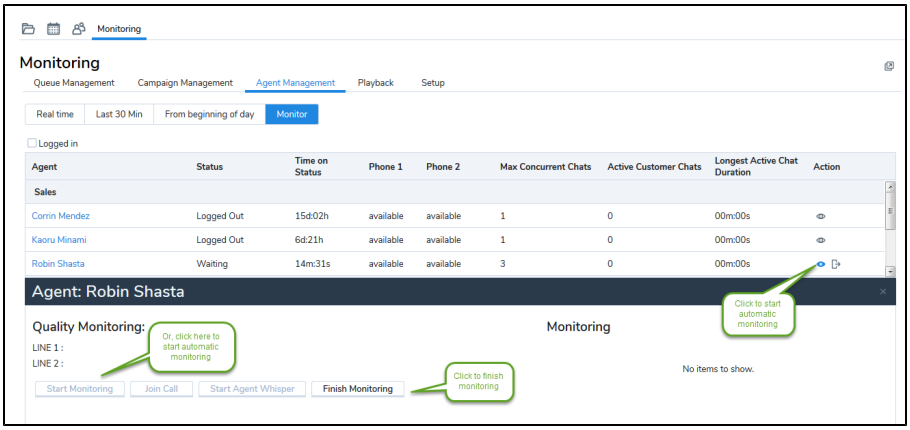
Automatic Monitoring

The ability to monitor and archive agent-customer conversations is critical to ensuring quality of customer service provided by your call center business. The silent monitoring feature allows a supervisor to eavesdrop on a conversation between an agent and a customer without either party knowing that they are being monitored.

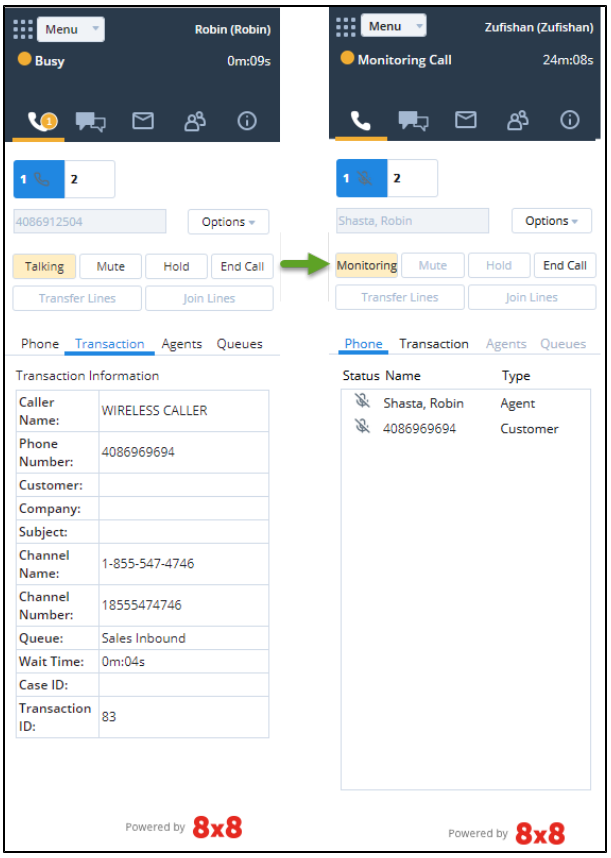
As a supervisor, you can listen in on all calls handled by an agent without having to manually turn on monitoring for each call. Any time the agent engages in a queued call, you are immediately offered a monitoring call automatically. Answer the call to listen to the agent's conversation. As a supervisor, you can enable settings to automatically invoke agent monitoring.

To set up automatic monitoring:

1. In the **Monitoring** window, select the agent you wish to monitor and click or **Start Monitoring** to begin monitoring.



2. When the agent engages in a queued call, you are offered a monitoring call.



3. Answer the call to listen in.
4. Click **End Call** in your Control Panel.

   OR

drop the call on your phone when you want to.

> **Note:** Do not click **Finish Monitoring** to retain the automatic monitoring settings.

5. When the agent handles the next call, you are offered the monitoring call again. Use your phone to listen in.

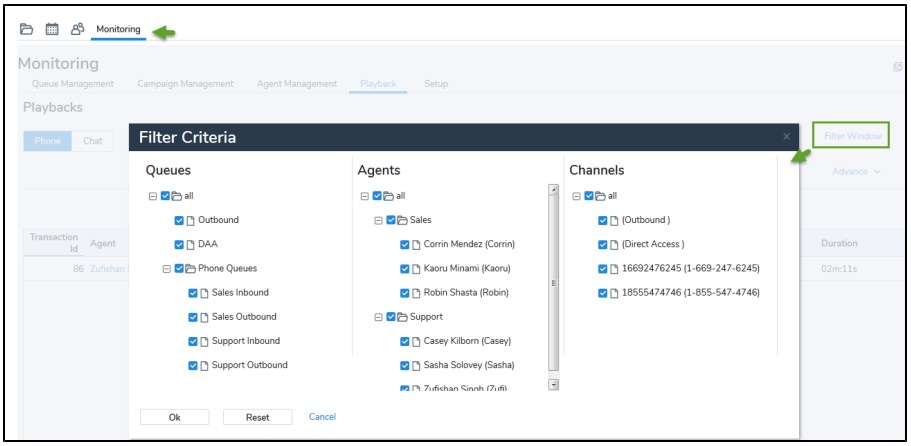
Retrieve Agent Call Recordings

As a supervisor, you can listen in on active calls handled by agents you supervise. You can access and play back call recordings from the Playback tab. With the ability to filter and search, you can get to the call recording you are looking for quickly. Call recordings are displayed in graphical waveform to quickly view and navigate to specific areas of recorded conversation.

The advanced search allows you to look up recordings based on transaction ID, contact (phone number), start date, and duration. For example, you can search for all recordings specific to a customer in the last week.

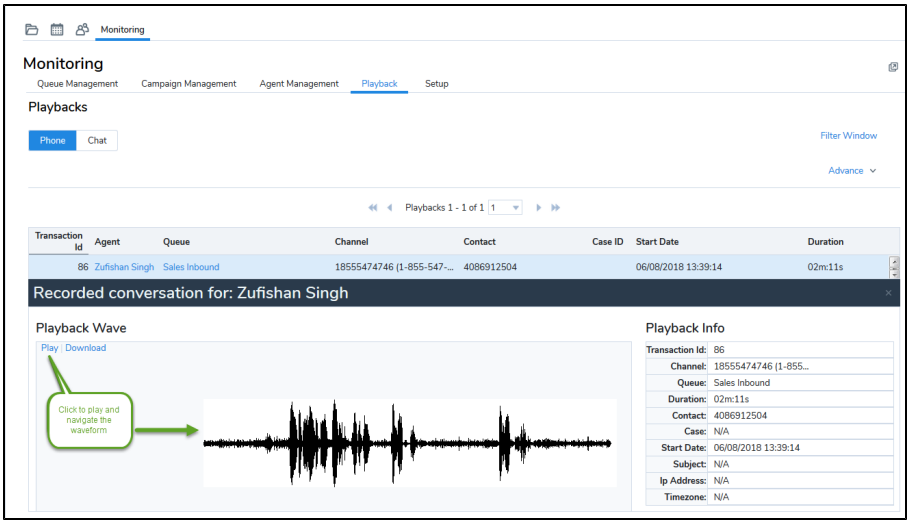
To play call recordings:

1. Click the **Playback** tab in the **Monitoring** window.
   A list of all call recordings shows.
2. Click **Filter** to specify the filtering parameters, such as agents, queues, or channels.



3. To search, click **Search** and look up by transaction ID, contact (phone number), start date, and duration. For example, you can search for all recordings specific to a customer in the last week.

4. Click the desired recording for a waveform display. You can click on the waveform and navigate easily.



Note: Mouse-driven waveform display requires HTML5-compliant browsers such as Chrome and Firefox. Internet Explorer does not support browser-embedded playback.

Access Chat Transcripts

We offer supervisors the capability to access transcripts of chat conversations between agents and customers. Using the Monitoring privilege, supervisors can access internal (agent-to-agent) and external (customer-to-agent) chat transcripts. Virtual Contact Center saves all chat messages automatically, and cannot be disabled.

Features

As a supervisor, you can:

- Access saved chat interactions using the **Monitoring > Playback** tab.
- Discern between internal and external records.
- Search chat records by specific data fields.
- Filter chat records by queue, agent, or channel.
- Sort the records by column headers.
- Select a different time zone to view the chat record. Ability to choose different time zones.
- Search for content within a chat record.

- Access transaction details, such as duration of chat, the channel and queue it was directed through, and more.
- Access pre-chat metadata (when available) for each interaction.
- Download the transcript.
- Pop out the chat transcript window from the **Monitoring** tab.

Limitations

Images shared during a chat are not saved while downloaded.

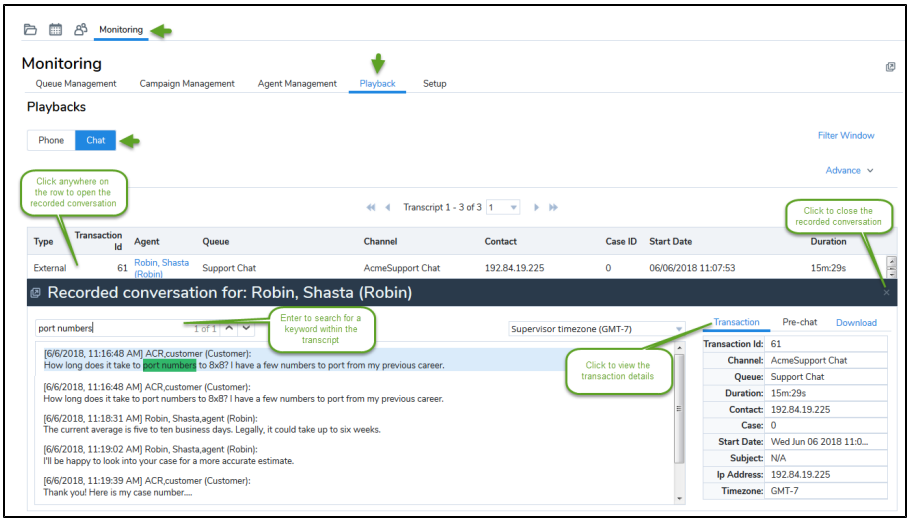
How to Access Chat Transcripts

As a supervisor, you can log in to Supervisor Console, sort, search, and filter for desired chat transcripts.

To view chat transcripts:

1. Log in to Supervisor Console.
2. From the Control Panel menu, select **Monitoring**.
3. In the **Monitoring** window, select the **Playback** tab.
4. Select **Chat** to access all chat transcripts.
   A list of available chat transcripts shows.
   - To filter, click **Filter Window**. Select the desired filter criteria for queues, agents, and channels.
   - To sort, click any desired column header. The list gets sorted alphabetically, numerically, or by date.
   - For a custom search, use the **Advanced Search** option. Create a desired search query, and click **Search**.
5. Click the desired chat transcript from the list to view the details.
   - To view the transaction details, click the **Transaction** tab on the right-hand side.
   - To view the pre-chat metadata, click the **Pre-chat** tab. The tab shows only if the chat included a pre-chat form.
   - To download the chat transcript, click **Download** on the right-hand side. It saves the transcript as a text file.

6. To search for a keyword within the transcript, enter the keyword in the search box. If found, all instances of the string are highlighted within the record.



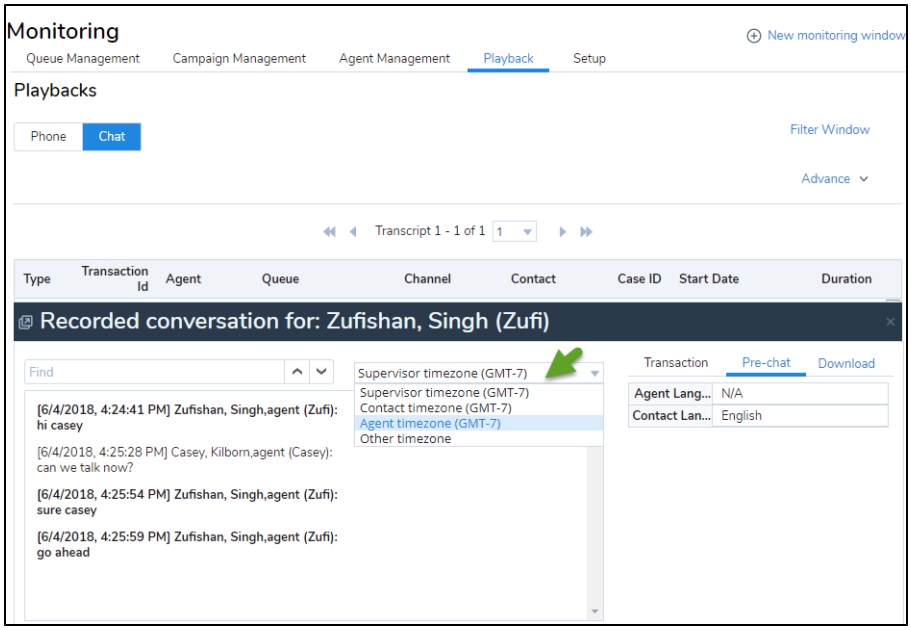
7. To pop out the chat transcript window, click .

Select a Time Zone in the Recorded Chat

By default, each chat transcript is shown in the tenant time zone. You can select a time zone from the following choices:

- **Supervisor timezone**: Shows the chat time in the time zone of the supervisor.
- **Contact timezone**: Shows the chat time in the contact's time zone.
- **Agent timezone**: Show the chat time in the time zone of the agent.

- **Other timezone**: Allows you to change to any available option for GMT.



To select a time zone in the recorded chat, in the **Monitoring** window, select **Playback > Chat**. Click the **Supervisor timezone** drop-down box to see other options.

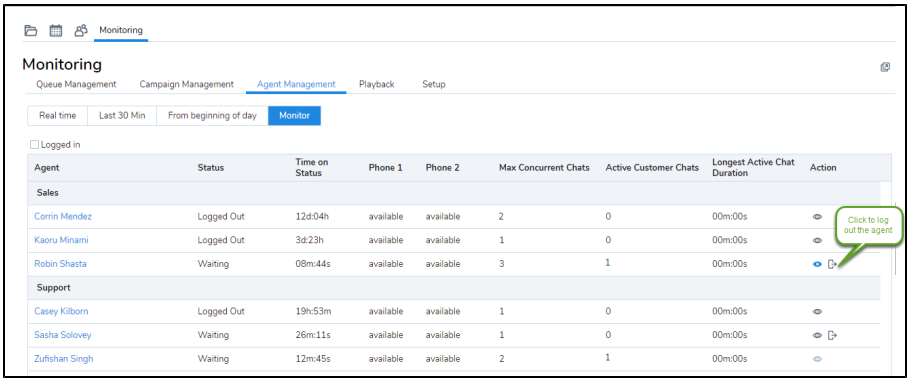
Log an Agent Out

If an agent forgot to log out at the end of the day, you can log the agent out of Agent Console using the Monitoring feature. You can log out only the agents supervised by you.

To log an agent out of Agent Console:

1. Log in to Supervisor Console as a supervisor.
   Only supervisor accounts can access the Supervisor Console log out feature.
2. Go to the **Agent Management** tab in the **Monitoring** tab.

3. Click **Monitor** in the header area.



In the list of agents, the Supervisor Console displays next to agents who are currently logged in.

4. Click next to the desired agent.
Supervisor Console logs the agent out, and updates the agent's status to **Logged Out**.

Historical Reports

Virtual Contact Center provides standard historical reporting with extensive filtering capabilities. You can generate reports on demand by date interval, agents, agent groups, queues, and media type. You can access reporting functionality through the Supervisor Console and generate the output in Excel spreadsheet format.

Benefits of historical reporting functionality include:

- Accessing vital canned or ad-hoc contact center statistics on demand
- Analyzing historical reports and trends, identifying areas for improvement
- Using a familiar application, Microsoft Excel, to further customize the reports and analyze the data

Overview

Virtual Contact Center provides an out-of-the-box package of reports focusing on agents, queues, channels, media, and campaigns. Click **Report** under the Control Panel menu to access historical reporting.
The reports available may be grouped as follows:

Agents Statistics

You can generate reports that provide historical data on agent activity, including the login time, logout time, number of interactions handled, time spent waiting or processing interactions, and details of accepted transactions.

- Time on Status
- Login time
- Transactions
- Transactions per media
- Transactions Per media per queue
- Transactions Per media per channel per queue
- Processing and post processing times
- Processing and post processing times per media
- Processing and post processing times per media per queue
- Processing and post processing times per media per channel per queue
- Other transaction analysis
- Detailed accepted transactions activity
- Detailed Outbound call activity
- Status change details
- Detailed accepted transactions with wrap up codes
- Detailed Outbound Transactions with wrap up codes
- Transactions grouped by wrap up codes
- Time on Break/Offline with Status Codes

Groups Statistics

You can generate a report on group activities such as waiting time, processing and post-processing time, time on break, time spent offline, and total login time per individual group and for all.

- Time on status

Media Statistics

These reports group transaction details by media such as phone, chat, email, and voicemail. You can get data about the number of interactions number of interactions that were answered within SLA, average waiting time and longest waiting time, the time interval within which the interactions were answered all grouped by media. You can also get statistical data on abandoned interactions per media.

- Transactions
- Abandoned transactions
- Accepted transactions - on line media

- Accepted transactions - off line media

Queues Statistics

The following reports provide specific data about the number of interactions that entered a queue, number of interactions that were answered within SLA, average waiting time and longest waiting time, the time interval within which the interactions were answered. You can also get statistics on abandoned interactions, including the number of abandoned interactions, average time to abandonment, and longest waiting time before being abandoned.

- Transactions
- Abandoned transactions
- Accepted transactions – On line media
- Accepted transactions – Off line media
- Detailed entered transactions activity
- Detailed accepted transactions activity

Channel Statistics

The following reports pull statistical data on the interactions grouped by channels under each media.

- Transactions
- Abandoned Transactions
- Accepted Transactions – On line media
- Accepted Transactions – Off line media

Campaign Statistics

The following reports provide information about campaigns, including campaign name, status, start and end time, total number of records processed, and statistics of calls processed based on the wrap up codes.

- Campaign Details
- Campaign Record Details
- Campaign Transaction Details
- Detailed Transaction Activity

In addition to the above reports, you can generate reports on Status Codes (find agent's status change with probable reasons), Transaction Codes (collect call disposition information), and Campaigns (collect campaign statistics for analysis and to determine the need for follow-up).

Summary of Historical Reports

Supervisor reports are available for Agents, Queues, Channels, Media, Groups, and Campaigns.

The following table lists the title of each historical report, and uses an **X** to indicate whether a version of the report exists for Agents, Queues, Channels, Media, Groups, or Campaigns.

Report title	Agents	Queues	Channels	Media	Groups	Campaigns
Detailed Transactions Activity	X	X	X	X		X
Abandoned Transactions		X	X	X		
Accepted Transactions - on line media		X	X	X		
Accepted transactions - off line media		X	X	X		
Campaign Details						X
Campaign Record Details	X					X
Campaign Transaction Details	X					X
Detailed accepted transactions activity	X	X				
Detailed accepted transactions with wrap up codes	X					
Detailed entered transactions activity		X				
Detailed outbound transactions with wrap up codes	X					
Detailed Outbound Call activity	X					
Transactions	X	X	X	X		
Transactions per media	X					
Transactions per media per channel per queue	X					
Transactions per media per queue	X					
Login time	X					
Other transactions analysis	X					
Processing and post processing times	X					
Processing and post processing times per media	X					
Processing and post processing times per media per queue	X					
Processing and post processing times per media per channel per	X					

Report title	Agents	Queues	Channels	Media	Groups	Campaigns
queue						
Status Change Details	X					
Time on status	X				X	
Transactions grouped by wrap up codes	X	X	X	X		
Time on Break/Offline with status Codes	X					

Generate Historical Reports

Use the Supervisor Console reporting function to create historical reports, or extract data for your contact center's Groups, Agents, Queues, Channel, and Campaigns. This data can be used to assess the performance of your Virtual Contact Center.

As a supervisor, you can generate historical reports to assess the performance of Virtual Contact Center. Supervisors can access the Historical Report Wizard tool to easily select from scores of pre-defined report templates, customize the reporting parameters, and save them for reuse or duplication. The reporting supports named filter templates to ease repetitive tasks.

The New Historical Report Wizard walks you through the following steps:

1. Select a pre-defined report template.
2. Add or customize reporting parameters such as agents and queues.
3. Save and run the report.

If you have restricted access to historical reports, you see historical data only pertaining to the groups and queues you supervise or are a member of.

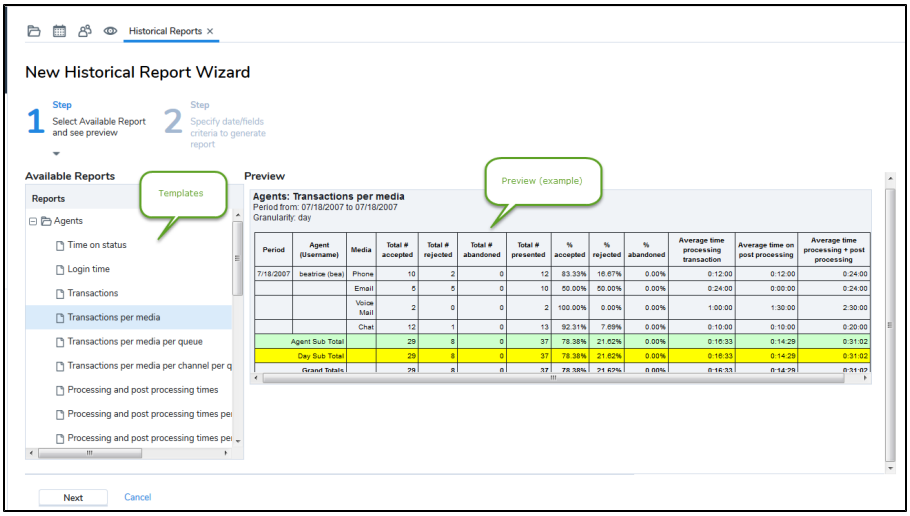
When you generate a report, Supervisor Console exports the report to Microsoft Excel. You can then print the report, customize the report's appearance, or export the report from Excel in a format (such as CSV) for import into another program.

To generate a historical report:

1. Log in to Supervisor Console as a supervisor. Only supervisors can generate historical reports.
2. From the Control Panel menu, select **Report**.
   The Display Panel opens the Historical Reports tab.
3. Click **Next**.
   The Historical Report Wizard walks you through the steps to generate a new report.

4. In **Step 1**, choose a template from the list.

   In the **Preview** area, Supervisor Console displays simulated data in an example of the selected report's layout.



5. Based on your selection, use the Selection tool to specify **Queue selection** or **Agent selection**.

   You can include or exclude deleted agents and queues information in the reports. For details on access to deleted agents and queues, refer to Generate Reports on Deleted Queues and Agents.

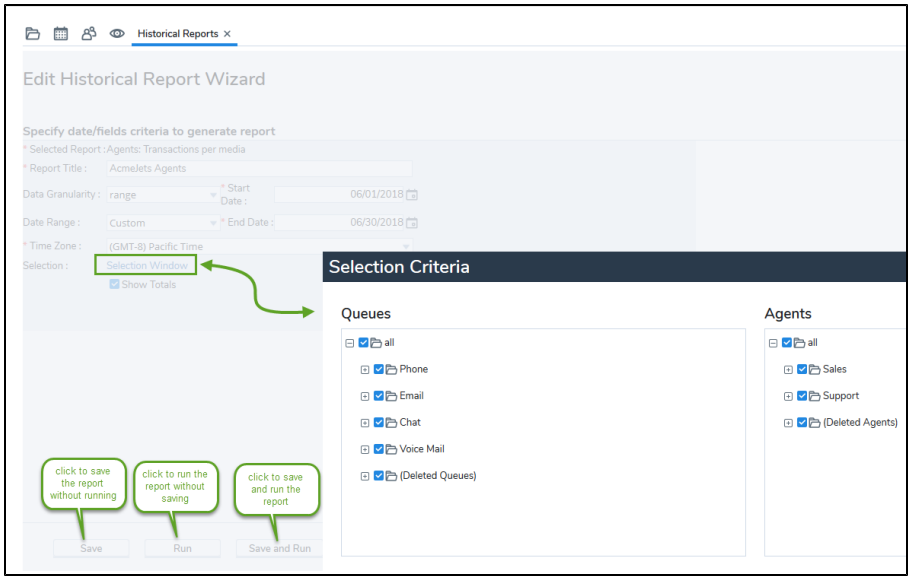
6. Specify the selected report's granularity and optional date range.

   a. In the **Data Granularity** list, choose a standard reporting resolution interval or choose **range**.

      Granularity specifies how frequently the report totals the data contained within the historical report.

   b. If you chose **range**, in the **Date Range** list choose a standard date range or choose **custom**.

c. If you chose **custom**, in the **Start Date** and **End Date** calendars, choose the first and last dates included in the custom date range.



7. Select a **Time Zone**.
8. Perform one of the following tasks:
   - To save the report configuration without running the report, click **Save**.
   - To run the report without saving the report configuration, click **Run**.
   - To run the report and save the report configuration, click **Save and Run**.

   The Supervisor Console generates the report, exports the report as a Microsoft Excel file.

> **Note:** If you have restricted access to historical reports, you will see historical data pertaining only to the groups and queues you supervise or are a member of.

Generate Reports on Deleted Queues and Agents

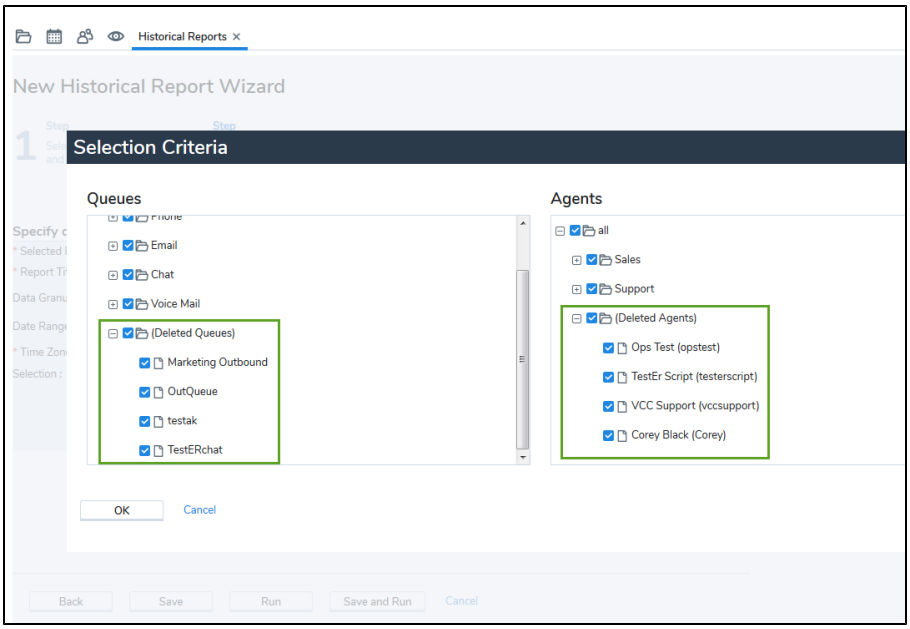
Supervisors can customize report data by including or excluding information on deleted agents or queues. Based on your supervisor privileges, you can control the report data by individually selecting agents or queues. Supervisors have improved visibility and increased flexibility in customizing the report data. If you have sufficient privileges to see all deleted agents, groups, and queues in the **Agent Selection** or **Queue Selection** list in the Reporting screen, you may include or exclude data about deleted agents and/or queues.

The following table summarizes supervisors' improved access to historical data based on their privileges:

Supervisor has Restricted Access	Access to Historical Data
No	■ All active agents from existing groups ■ All deleted agents from existing and deleted groups ■ All active and deleted queues
Yes	■ All active and deleted agents from existing groups with monitoring privileges ■ All deleted agents/groups which you previously monitored ■ All active queues which you supervised ■ No access to any data about groups/queues you do not monitor

To include deleted agent and queue information in the reports:

1. Click a report to generate.
2. Click the **Agent Selection** and/or **Queue Selection** drop-down list. You can see all agent groups.
3. Select individual agent groups or queues. If you expand an agent group, you can see current as well as deleted agents under the group.



4. You may select a list of deleted agents and/or queues from the list.
5. Enter other criteria and click **Export** to generate a report.

For details on generating historical reports, refer to Generate Historical Reports.

Report on Status Codes

Status codes enable contact center supervisors to track how an agent spends their time through a workday. When an agent is logged in to Agent Console, they accept or reject interactions (if permitted by administrators), takes breaks, works offline, or logs out. As a supervisor, you may want to know reasons for an agent changing the status or rejecting an interaction. Agent statuses, such as On Break and Work Offline, do not point out the specific reasons for status changes by the agent. The status codes associate an agent's status change with probable reasons, and enable supervisors or managers to track agent work patterns.

Your contact center administrator can create customized status codes in Configuration Manager if the Virtual Contact Center tenant includes the optional status codes feature.
The following table lists agent status changes with examples of corresponding status codes.

Agent Statuses on Agent Console	Examples of Status Codes
Take Break	■ Lunch ■ Short Break ■ Restroom
Work Offline	■ Attend Meeting ■ Project Work ■ Training ■ Outbound Call
Logout	■ End of shift ■ PC Reboot
■ Reject Phone ■ Reject Chat ■ Reject Email	■ Working on a Case ■ Technical Issue ■ Not Ready for Interaction ■ Nearing Break Time

As an agent processes interactions and changes their status, Agent Console prompts the agent to select from your list of customized status codes. Agent Console incorporates the available codes into historical reports.

How do agents use status codes?

Agents assigned to a status code list are presented with individual status codes in the list when they choose an action associated with codes. The agent must choose a code from the presented list, and only then is allowed to proceed with the action. For example, When an agent who is active changes their status to **Work Offline**, a list of status codes associated with the action, such as **Attend Meeting** and **Project Work**, are presented in a drop-down list on the Control Panel. The agent must choose a status code from the list that describes the reason for the status change before being able to work offline.

How do supervisors use status codes?

Supervisors can track how an agent spends time by generating the following two historical reports:

- **Agent: Status change details**: The report gives detailed information on an agent's status changes, the time at which an agent changed their status, and an associated reason, if any. When the supervisor browses through the report, they get information about how often an agent changed status, as well as the reason for status change.

Agents: Status change details
Period: 06/01/2018 - 06/06/2018
Granularity: day
Report Generated on: 06/06/2018 16:04:17 (GMT-8)
Time Zone: (GMT-8) Pacific Time

This report gives details on an agent's status change, such as working offline or on break, the time the status changed, and the reason for it

Period	Agent (Username)	Status	Time	Reason		Transaction
				Code	Text	
06/06/2018	Robin Shasta (Robin)	Logged Out	06/06/2018 15:29:43	Unt 1	Attend Meeting	N/A
06/06/2018	Robin Shasta (Robin)	Logged In	06/06/2018 15:29:45	Unt 2	Finishing Case Work	N/A
06/06/2018	Robin Shasta (Robin)	On Break	06/06/2018 15:29:46	Unt 1	Attend Meeting	N/A
06/06/2018	Robin Shasta (Robin)	Available	06/06/2018 15:29:55	Unt 1	Attend Meeting	N/A
06/06/2018	Robin Shasta (Robin)	Work Offline	06/06/2018 15:50:52	Unt 3	Working on Case	N/A
06/06/2018	Sasha Solovey (Sasha)	Logged In	06/06/2018 15:51:27	Unt 2	Finishing Case Work	N/A
06/06/2018	Sasha Solovey (Sasha)	On Break	06/06/2018 15:51:28	Unt 3	Working on Case	N/A
06/06/2018	Sasha Solovey (Sasha)	Available	06/06/2018 15:51:32	Unt 2	Finishing Case Work	N/A
06/06/2018	Sasha Solovey (Sasha)	Work Offline	06/06/2018 15:51:51	Unt 1	Attend Meeting	N/A
06/06/2018	Robin Shasta (Robin)	Available	06/06/2018 15:54:43	Unt 1	Attend Meeting	N/A
06/06/2018	Robin Shasta (Robin)	On Break	06/06/2018 15:59:33	Unt 4	End of Shift	N/A
06/06/2018	Sasha Solovey (Sasha)	On Break	06/06/2018 16:03:03	Unt 4	End of Shift	N/A
06/06/2018	Sasha Solovey (Sasha)	Work Offline	06/06/2018 16:03:10	Unt 2	Finishing Case Work	N/A
06/06/2018	Robin Shasta (Robin)	Logged Out	06/06/2018 16:03:50	Unt 3	Working on Case	N/A
06/06/2018	Sasha Solovey (Sasha)	On Break	06/06/2018 16:03:56	Unt 1	Attend Meeting	N/A
06/06/2018	Sasha Solovey (Sasha)	Logged Out	06/06/2018 16:04:02	Unt 1	Attend Meeting	N/A
06/06/2018	Robin Shasta (Robin)	Logged In	06/06/2018 16:04:05	Unt 1	Attend Meeting	N/A
06/06/2018	Robin Shasta (Robin)	On Break	06/06/2018 16:04:06	Unt 3	Working on Case	N/A
Day Sub Total						
Grand Totals						

- **Agents: Time on Break/Offline with status codes**: The report indicates how an agent spends time on each task while working offline or on a break. The report summarizes information on time spent on each status code by status, by agent, and by date.

Agents: Time on Break/Offline with status codes
Period: 06/06/2018 - 06/06/2018
Granularity: day
Report Generated on: 06/06/2018 16:26:38 (GMT-8)
Time Zone: (GMT-8) Pacific Time

This report shows how an agent spends time on each task while working offline or on break

Period	Agent (Username)	Working offline										Break			
		Meeting (Attend Meeting)		N/A (N/A)		Attend Meeting (Attend Meeting)		Finishing Case Work (Finishing Case Work)		Working on Case (Working on a case)		End of Shift (End of shift)		N/A (N/A)	
		Time	%	Time	%	Time	%	Time	%	Time	%	Time	%	Time	%
06/06/2018	Robin Shasta (Robin)	0:00:15	4.53%	0:01:25	25.68%	0:00:00	0.00%	0:00:00	0.00%	0:03:51	69.79%	0:05:08	26.69%	0:14:06	73.31%
06/06/2018	Sasha Solovey (Sasha)	0:00:00	0.00%	0:00:00	0.00%	0:11:12	93.59%	0:00:46	6.41%	0:00:00	0.00%	0:00:00	0.00%	0:00:17	100.00%
06/06/2018	Zufishan Singh (Zufi)	0:00:00	0.00%	0:00:00	0.00%	0:00:00	0.00%	0:00:00	0.00%	0:00:00	0.00%	0:00:00	0.00%	0:00:04	100.00%
Day Sub Total		0:00:15	1.43%	0:01:25	8.10%	0:11:12	64.06%	0:00:46	4.39%	0:03:51	22.02%	0:05:08	26.21%	0:14:27	73.79%
Grand Totals		**0:00:15**	**1.43%**	**0:01:25**	**8.10%**	**0:11:12**	**64.06%**	**0:00:46**	**4.39%**	**0:03:51**	**22.02%**	**0:05:08**	**26.21%**	**0:14:27**	**73.79%**

For example, if Agent Beatrice spent 2:11:15 checking tickets and 0:27:12 attending personal phone calls while working offline, the report indicates Beatrice spent 82.8% of her total working offline time checking tickets, and

17.2% for personal calls. The report also indicates the total time spent by status code for all agents included in the report.

Report on Transaction Codes

Transaction codes offer a means to set calling line identifier (caller ID), and to apply call disposition to inbound as well as outbound interactions. Each inbound or outbound interaction in a call center has some purpose and disposition. Transaction codes can be defined to collect call disposition information from the agents at the time of the call, and supervisors can report on this information for analysis and to determine further processing.

Your contact center administrator can create customized transaction codes in Configuration Manager if the Virtual Contact Center tenant includes the optional transaction codes feature.

How do Agents use Transaction Codes?

During the processing of an interaction, a transaction code list is presented to an agent on Agent Console under the following circumstances:

- The agent is a member of the group assigned with the code list.
- The agent is a member of the queue/s assigned with the code list/s.

From the presented code list, an agent selects transaction codes:

- before initiating the call.
- during the call.
- at the end of the call during post-processing.

An agent assigned to an outbound calling line identifier code list is presented with the list before initiating an outbound call. The agent must choose a code before dialing. The phone number associated with the selected code sets the caller ID to the call.

An agent assigned to a call disposition list is presented with the code list during an interaction. The agent may select and save one code or multiple codes from a list anytime during the interaction or post-processing. When an agent is a member of the group or queue assigned with multiple lists, all lists are presented to the agent in separate tabs when they accept a call. The agent may select and save codes from multiple lists, and the selected codes appear in historical reports.

The following table lists the uses of transactions codes with corresponding examples:

Reasons for using transaction codes	Examples of transaction codes
State the purpose of an interaction	▪ Sales Call ▪ Service Call

Reasons for using transaction codes	Examples of transaction codes
	■ Support Call
Indicate the outcome of an interaction	■ Prospect Interested – Call Back ■ Prospect not Interested – Do not Call Back ■ Reached Voicemail – Try Again ■ Faulty Number
Define Calling Line Identifier for an outbound call.	Kids Zone - Kids Entertainment Company EMAC - Credit Recovery Inc.

How do Supervisors use Transaction Codes?

Supervisors generate historical reports to get call disposition information for analysis, and to determine the need for follow-up actions based on transaction codes. The following reports list transaction codes used during agent interactions.

- **Agents: Detailed accepted transactions with wrap up codes**: This report lists wrap-up codes used by an agent during all of their inbound accepted interactions. Wrap-up codes indicate call disposition information. You may find multiple instances of the same call to indicate multiple wrap-up codes applied to the same call.
- **Agents: Detailed outbound transactions with wrap up codes**: This report lists dial codes as well as wrap-up codes. Dial codes are caller ID-related codes which appear before dialing the call. An agent can apply only one dial code to a call, whereas they can apply multiple wrap-up codes.

Agents: Detailed outbound transactions with wrap up codes
Period: 05/02/2011 - 05/02/2011
Granularity: day
Report Generated on: 05/02/2011 16:39:51

Period	Agent (Username)	Destination	Call Start Time	Call Duration	Transaction	Wrap Up		Dial	
						Code	Text	Code	Text
05/02/2011	John Doe	15106766000	05/02/2011 12:5	0:00:41	162	Int	pspect Interested	KZ	Kids Zone
05/02/2011	John Doe	12146234456	05/02/2011 13:0	0:00:20	163	NI	Not Interested	KZ	Kids Zone
05/02/2011	John Doe	14084214566	05/02/2011 13:0	0:00:43	164	NO	Do not call back	KZ	Kids Zone
05/02/2011	John Doe	13431212211	05/02/2011 13:0	0:00:24	165	S3	Payment sent	CR	EMAC-Credit
05/02/2011	Elaine Smith	13445656431	05/02/2011 13:0	0:00:46	166	S4	pspect Interested	KZ	Kids Zone
05/02/2011	Elaine Smith	15106116215	05/02/2011 13:2	0:00:28	169	WN	Wrong Number	CR	EMAC-Credit
05/02/2011	Elaine Smith	15102312211	05/02/2011 13:2	0:00:58	170	Int	Successful Sale	KZ	Kids Zone
05/02/2011	Ashley Bennette	14083454433	05/02/2011 13:2	0:04:55	171	PS	Payment sent	CR	EMAC-Credit
05/02/2011	Ashley Bennette	19212323344	05/02/2011 15:2	0:00:02	179	DI	Dispute	CR	EMAC-Credit
05/02/2011	Ashley Bennette	14152244323	05/02/2011 15:4	0:00:02	180	SS	Successful Sale	KZ	Kids Zone
05/02/2011	Ashley Bennette	14555434223	05/02/2011 16:3	0:00:22	181	NI	Not Interested	KZ	Kids Zone

- **Agents: Transactions grouped by wrap up codes**: This report groups transactions by wrap-up codes, by queue, by channel, by media, and by agent.

Agents: Transactions grouped by wrap up codes
Period from: 07/18/2007 to 07/18/2007
Granularity: day

Period	Agent (Username)	Media	Channel	Queue	Follow Up (002)				Call back (015)				N/A (N/A)			
					#	%	Time	%	#	%	Time	%	#	%	Time	%
01/27/2011	Agent Smith (pma)	Chat	Chat Channel	Support	12	36.36%	0:16:08	43.82%	14	42.42%	0:14:45	40.06%	7	21.21%	0:05:56	16.12%
01/27/2011	Agent Smith (pma)	Email	wpj1@contactual.com	Support Email	24	32.43%	0:28:40	26.67%	13	17.56%	0:12:14	11.38%	37	50.00%	1:06:35	61.95%
01/27/2011	Agent Smith (pma)	Email	wpj2@contactual.com	Helpdesk Email	24	32.43%	0:41:49	32.50%	13	17.56%	0:09:01	7.01%	37	50.00%	1:17:51	60.50%
01/27/2011	Agent Smith (pma)	Email	wpj3@contactual.com	Sales Email	4	66.66%	0:03:57	80.34%	2	33.33%	0:00:58	19.66%	0	0.00%	0:00:00	0.00%
Agent Sub Total					64	34.22%	1:30:34	32.59%	42	22.46%	0:36:58	13.30%	81	43.32%	2:30:22	54.11%
Day Sub Total					64	34.22%	1:30:34	32.59%	42	22.46%	0:36:58	13.30%	81	43.32%	2:30:22	54.11%
Grand Totals					**64**	**34.22%**	**1:30:34**	**32.59%**	**42**	**22.46%**	**0:36:58**	**13.30%**	**81**	**43.32%**	**2:30:22**	**54.11%**

According to the sample report shown above, on 1/27/2011, Agent Smith processed 12 Follow-up chats, 14 Call back chats, and 7 chats with undefined wrap-up codes, totaling 33 chats for the Support queue. The respective percentage values are 36.36%, 42.42%, and 21.21%. Agent Smith spent 0:16:08 on 12 chats, 0:14:45 to process 14 chats, and 0:05:56 to process other chats, accounting to a total of 0:36:49 minutes. Accordingly, the % values by wrap-up code are 43.82% for follow-up chats, 40.06% for Call back chats, 16.12% on other chats. Additionally, Agent Smith processed emails from three other queues; Support Email, Helpdesk Email, and Sales Email.
The report also indicates Agent Smith processed a total of 64 follow-up interactions (Chat and Email), 42 Call back interactions, and 81 interactions with undefined wrap-up codes, with the respectively percentages of 34.22%, 22.46%, and 43.32%. Similarly, the total time spent is indicated. You can further customize the report to include data about any number of agents for a particular day or date range.

Report on Campaigns

On initiating a campaign, campaign calls are offered to agents for processing. As a supervisor, you may monitor and control these campaigns. You can generate historical reports to get information on campaign statistics for analysis and to determine the need for follow-up actions, based on transaction codes, and for further recycling of the campaigns.

If your Virtual Contact Center tenant includes the optional Dialer feature, your contact center administrator is able to set up the Dialer functionality and create campaigns.

You can generate reports of the campaigns you supervise. The new campaign filter allows you to filter the report data by selecting the desired campaigns. The following reports provide exclusive details about new, running, and completed campaigns.

Campaign Details

This report provides information about campaigns including campaign name, status, start and end time, total number of records processed, retry properties, and statistics of calls processed, based on the wrap-up codes.

Campaigns: Campaign Details
Period: 06/08/2018 - 06/08/2018
Granularity:
Report Generated on: 06/08/2018 16:33:04 (GMT-8)
Time Zone: (GMT-8) Pacific Time

Campaign Name	Enabled	Status	# Of Records	# Of Completed Records	Caller ID	Queue	Scheduled Start & End Time		Actual Start & End Time		Daily Call Start & End Time		
							Start Time	End Time	Actual Run Time	Actual Stop Time	Daily Calling Method	Daily Calling Schedule	Daily Ca
AcmeSales	Yes	New	0	1340	Anonymous	Sales Outbound	06/01/2018 01:00:00	06/30/2018 23:30:00			None		
AcmeSales New	Yes	New	888	888	Anonymous	Sales Outbound	06/01/2018 01:00:00	06/30/2018 23:30:00			None		
Campaign AcmeJets 101	Yes	New	2018	2018	18888888888	Support Outbound	06/01/2018 01:00:00	06/30/2018 23:30:00			Area Code	Default Schedule	
Sales Campaign	Yes	New	201	201	Anonymous	Sales Outbound	06/01/2018 01:00:00	06/30/2018 23:30:00			None		
Grand Totals			4447	4447									

Campaign Record Details

This report details each campaign record providing information on the status of each call, phone list available for each record, transaction information, the phone number called previously, time the call was completed, disposition action, wrap up code, and more. You can select a single campaign or multiple campaigns for reporting.

Campaign Transaction Details

This report includes transaction details for each call, such as the processing time for each transaction, post processing time, and total processing time, in addition to the campaign record details.

Customer Experience Overview

Virtual Contact Center Customer Experience is a streaming analytics application which provides contact center managers and supervisors real-time detailed view of their caller's experience once the call enters the contact center instance. Customer Experience provides detailed and aggregate view of all call interactions to and from the contact center instance.

Customer Experience is designed to be utilized as an analysis tool to optimize IVR designs, call routing rules and agent performance, resulting in improved business services and a positive customer experience with the contact center. It focuses on the call's end-to-end journey, helping to understand the need for IVR design change or further agent training. It also helps us assess agent performance. The path the caller takes (along with their selections) is recorded and available for supervisors. The contact center supervisor can review and assess the details of an individual call, or the calls coming to an agent.

For example, the Recent Calls functionality of Customer Experience helps supervisors answer questions such as:

- How many calls are rejected by an agent?
- How many times was a caller placed on hold?
- How many times was a caller transferred?

- What percentage of callers hang up in the IVR, and at which point?
- What is the average wait time in queue before a caller hangs up?

The Dominant Paths and IVR Metrics modules of Customer Experience, on the other hand, helps find design issues in the IVR, caller behavior, and trends.

To see the full functionality of this feature, you need to have supervisor rights. A supervisor can launch 8x8 Customer Experience from Supervisor Console, eliminating the need for a separate login.

Features

Customer Experience provides:

- A real-time streaming analytics application for supervisors and contact center managers.
- A graphical call flow presentation of the customer interactions inside Virtual Contact Center.
- An advanced search criteria to locate a call.

> **Note:** Supervisors with restricted reporting privileges only see the queue names they are assigned to. Your Virtual Contact Center administrator can configure this option in Configuration Manager under **Users >Supervisor > Restrict report privileges**. See Virtual Contact Center Administrator Guide for details.

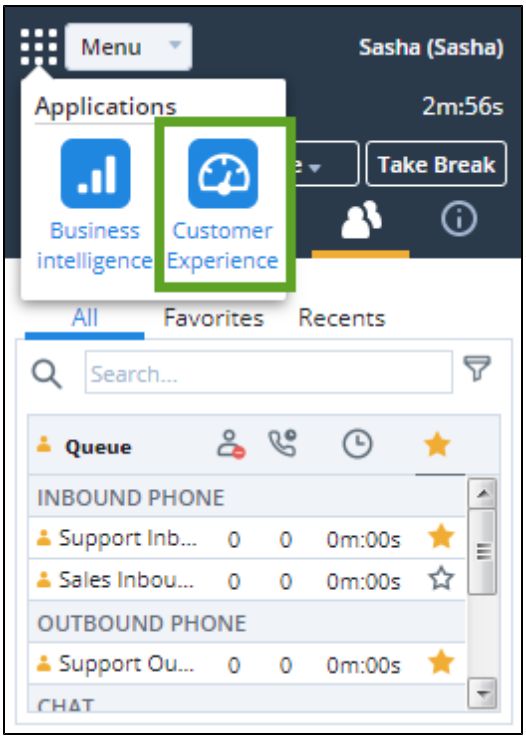
- The dominant path view of the most active paths within the IVRs of your Virtual Contact Center.
- The simple analytics data of Customer Experience inside IVR.
- The option to download data in Excel and PDF formats.

Log In

To access Customer Experience in Virtual Contact Center:

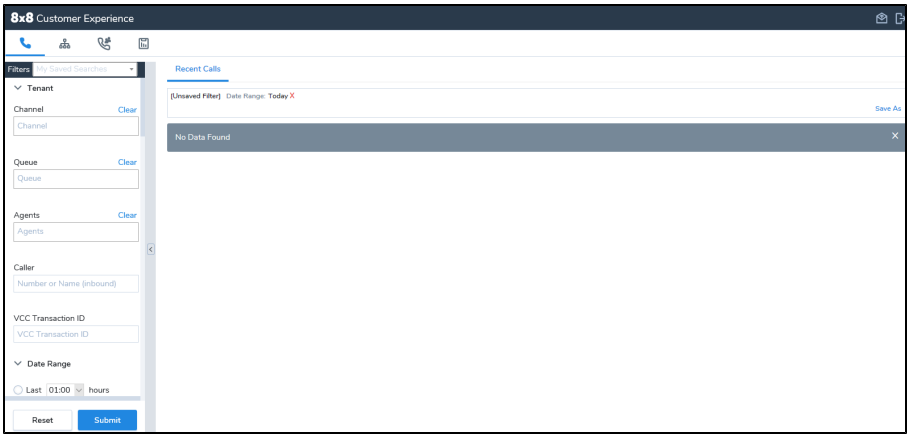
1. Log in to Supervisor Console.

2. Click the **Application Selector** in the Control Panel.



3. Select **Customer Experience**.

   The dashboard launches in a separate browser window.

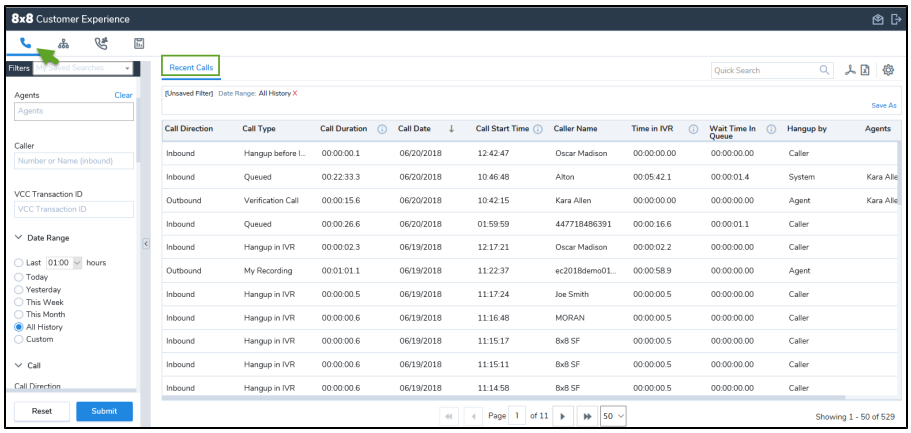


4. Use the top navigation menu to access the following dashboards:
   - Recent Calls
   - Dominant Paths
   - IVR Metrics
   - Post Call Survey

Know the Interface

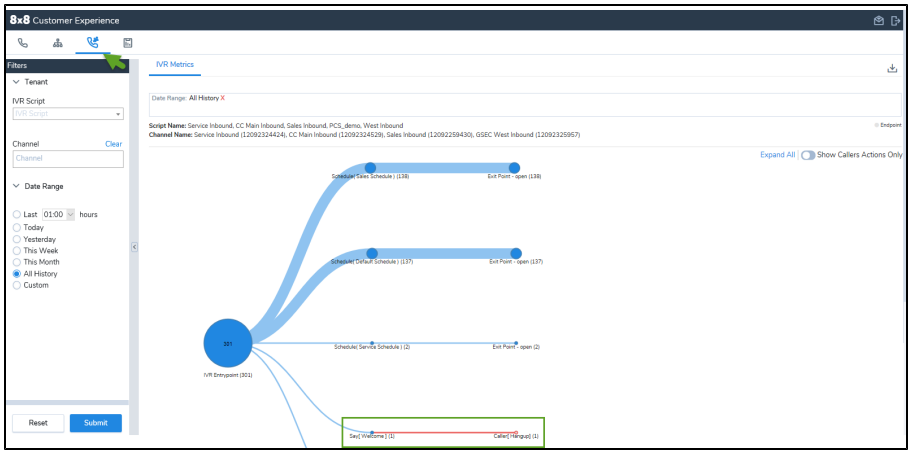
The Customer Experience application allows supervisors to access specific call details and aggregate analytics from the following dashboards:

- **Recent Calls**: Search for the past and recent call details in real time based on the date range filter. Get to know the path taken by each call from entry to exit.



- **Dominant Paths**: Learn about the top ten dominant paths taken by callers in IVR, accompanied by visual representation.

- **IVR Metrics**: Displays graphical metrics of the IVR path taken by all calls entering your contact center and drills down the IVR path taken during the specified time period.



- **Post Call Survey**: Access and analyze the the Post Call Survey results processed by Virtual Contact Center Customer Experience.

Customer Experience can be accessed via Agent Console. Go to **Customer Experience** to see the dashboards.

Access Recent Calls

In Customer Experience, agents can filter and view their recent calls. It provides a detailed map of the call journey from the time the call enters the contact center until the time the call is terminated. It also answers questions such as who answered the call, how long the call remained in the queue, whether the call was transferred, how long the call was on hold, caller's phone number and name, and much more.

Use Cases

The contact center supervisors look for:

- **Repeated Calls Count**: Find out if the incoming calls are legitimate coming from real customers, or they are machine-generated spam calls made from the same telephone number. Spam calls can affect the productivity of the agents and increase unnecessary work load, not to mention the impact on branding or social image of your company.
- **Calls that are hung up by the agent**: View if the calls are hung up by the customer or the agent.
- **Calls that are rejected by the agent**: View the calls that are rejected by the agent, to determine the agent's performance.
- **Agents who have performed verification calls**: Virtual Contact Center requires agents to perform verification calls in the agent application. If an agent forgets to complete this requirement before their first live call, the agent's phone may not work properly as a Virtual Contact Center agent workplace phone to receive calls.

- **Calls that are put on hold**: View number of times a call was put on hold. An agent who puts a call on hold more than two or three times may require additional training. The length of the hold time is also used to track agent performance.
- **Calls that are transferred**: View number of times a call was transferred. An agent who transfers too many times may require additional training. It can also indicate an issue with the IVR if calls are not routed to the right agents.
- **The type of call transfer**: View the type of transfer such as calls transferred to a queue or another agent.
- **The amount of time calls waited in queue**: Find out how long the calls have waited in the queue.
- **The number of times agents put themselves on mute**: View the number of times agents put themselves on mute during a call. Excessive mute counts may be an indicator to research root cause of behavior.
- **Short inbound calls**: Filter inbound calls with call duration of 0-30 seconds. It helps agents to call back the customers they lost connection with or did not finish speaking to.

Example

To achieve any of the above results, a simple search is all you need. For example, transfer count shows the number of times a call is being transferred to another agent or queue. An agent that transfers too many times may require additional training. It can also indicate an issue with the IVR if calls are not routed to the right agents. The following steps show how to achieve such results:

To track the number of transfers:

1. In Customer Experience, click to open **Recent Calls**.
2. Under **Call** section, select **Inbound** for Call Type.
3. Under **Call** section, select **Transfer Count** and enter other range of transfers.
4. Click **Submit**.
5. The results appear in the right panel, showing the calls with number of transfers within the range.

To access Recent Calls:

1. In the Customer Experience dashboard, click to open **Recent Calls**.
2. Apply the desired filters and click **Submit**. The search results appear on the right.
   The following table shows the filters available in Recent Calls:

Available Filter Groups	Description
Tenant	■ **Channel**: Choose a phone channel from the list. You can search by a service channel number, or channel name. ■ **Queues**: Choose one or more queue names. Supervisors with restricted reporting privileges only see the queue names they are assigned to. You can filter verification calls or outbound calls not routed via queues, using **No Queues Involved** filter option. Your Virtual Contact Center administrator can configure this option in Configuration Manager under **Users >Supervisor > Restrict report privileges**. See Virtual Contact Center Administrator Guide for details. ■ **Agents**: Choose one or more agents from the list. You can use **No Agents Involved** filter option to filter the calls abandoned in IVR before entering a queue. ■ **Caller**: Search by the inbound caller's name or caller's phone number. Searches can be done using * as wildcard in the string. ■ **VCC Transaction ID**: A unique ID assigned to each interaction that enters Virtual Contact Center.
Date Range	Specify the date and time range to filter data displayed, such as a few hours in the past, the whole month and history
Call	■ **Call Direction**: Select the direction of calls such as Inbound or Outbound. ■ **Call Type**: Select the type of calls, such as Queued, No Queue, Verification, and more: ○ Queued: Select the calls that entered a queue after IVR. ○ No Queue: Select the calls that did not go through a queue, such as outbound calls made directly on PSTN by an agent. ○ Direct Agent Routing: Select the calls that were routed to an agent directly. ○ Agent-to-Agent: Select calls that were made between agents. ○ Agent Verification: Select verification calls, the calls placed by an agent at the beginning of their shift to test if they can receive calls. ○ Post Call Surveys - Callback: Select system-dialed Post Call Survey calls in response to call back opted by customers. ○ Hangup in IVR: Select the inbound calls that hung up in the IVR. ○ Hangup before IVR: Select the inbound calls that hung up before reaching IVR. ○ Voicemail: Select the calls that were forwarded to voicemail, such as calls that are rejected by an agent. ○ Call Forwarded: Select the calls that were forwarded to an external number or an IVR. ○ Direct Agent Access: Select the calls that went directly to an agent.

Available Filter Groups	Description
	○ My Recording: Select the calls that were placed by agents to record personal greetings. ■ **Hangup By**: Select Hangup filter option(s) to report on an agent, caller, or system. System hangup is an event terminating a call, for example, reaching the IVR Default Termination or an IVR Exit point with a hangup object. ■ **Outcome**: Select one or more calls outcome such as calls rejected by an agent, calls that the caller spoke to an agent, or calls that have gone to a voicemail, etc. ■ **Transfer**: Select one or more call transfer options to report on, such as transfer to an agent, another number, a queue, or a blind transfer. ■ **IVR Exit Points**: Select one or more conditions to report on, such as transactions that were queued from the IVR, or calls hung up in the IVR. ■ **Repeated Calls Count**: Enter the number of times a call was repeated (coming from the same caller's number) within a specified time. With the help of this filter you can analyze cases such as: ○ Call efficiency. ○ Track spam calls coming into the call center. ○ Detect poor response from the call center agents, whether the issue was resolved after the first call, or the agent lacked the knowledge to resolve the issue. ○ Whether the callback option was effective. ○ Whether the routing option was designed properly. ■ **Call Duration**: Select calls that lasted a specific time range; for example, calls that lasted from 1 to 45 seconds. ■ **Time in Queue**: Enter the duration of the time the call waited in a queue. It shows the total wait time before connecting to an agent. ■ **Time in IVR**: Enter the amount of time a call or transaction spent in IVR before it was routed to a queue or agent. ■ **Transfer Count**: Select a range count on the number of times a call was transferred.
Agent Calls	■ **Call Duration**: Filter the duration of calls in seconds, minutes, or hours. ■ **Total Hold Duration**: Enter the total duration of time the call was placed on hold by an agent. ■ **Hold Count**: Enter the number of times a call was placed on hold by an agent. ■ **Mute Count**: Enter the number of times a call was placed on mute by an agent. The ability to count the

Available Filter Groups	Description
	number of mutes can address the need for Hold and Mute SLA reports, or detect any undesirable behavior by agents who may mute customers to fake one way audio.

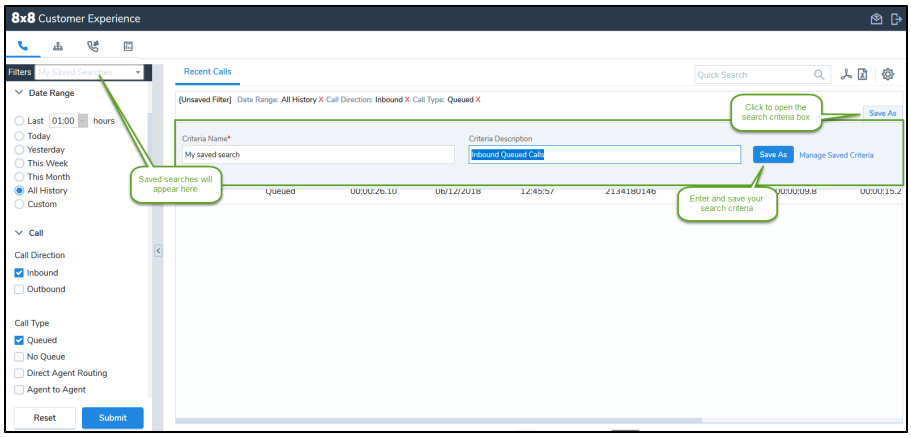
Note: For a faster search, save your filters and apply them the next time you need.

Save Your Filter

You can save your search filters, and run them the next time you need for a faster search. For example, you can search for all the inbound queued calls you or your agent have received in the last month which lasted under 20 seconds, and save your search criteria.

To save your search filter:

1. While in the **Recent Calls**, select the filter criteria you would like to apply.



2. Click **Save As**.
3. Enter a **Criteria Name** and **Criteria Description**.
4. Click **Save As** again.
   Your search filter is saved and added to the filters drop-down list. You can apply your saved filter to the active calls.
5. To update or modify your saved search, make changes in the filters, and click **Save**.

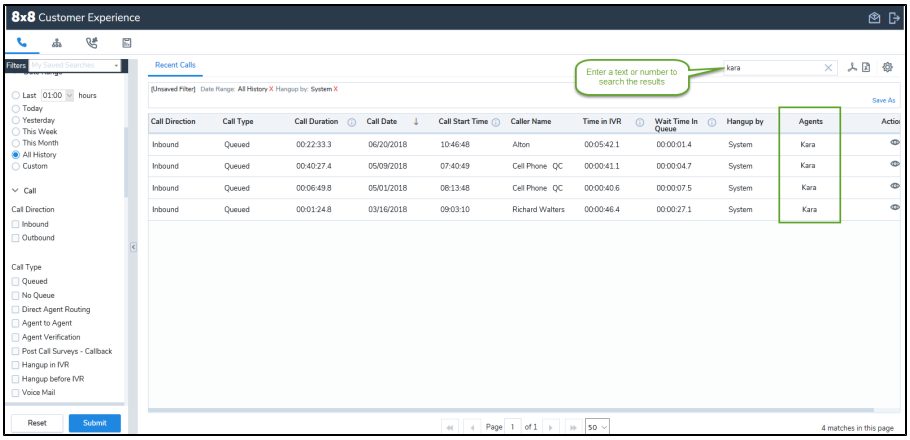
   To delete the saved search from the filters drop-down list, click next to that search in the list.

3. Click to show or hide **Column Settings**.
   To return to the default column view, select **Reset to Default**. To go back to Recent Calls, click outside the column settings. The selected settings are applied.

Fields in Column Settings

Fields	Description
Column Settings	■ **Abandon Time**: Shows the duration from the time the call enters the queue until the caller hangs up before speaking to an agent. ■ **Agents**: Shows the agent who handled the call. ■ **Call Date**: Shows the date the call was made. You can sort the column by call date. ■ **Call Direction**: Shows the direction of calls such as Inbound or Outbound. ■ **Call Duration**: Shows the duration of the call in hours, minutes, seconds, and milliseconds (HH:MM:SS.MS). ■ **Call Start Time**: Shows the start time of the call in HH:MM:SS. You can sort the column by date, but not by time. ■ **Call Type**: Shows the type of calls such as Queued, No Queue, Verification, etc. ■ **Caller Name**: Shows the caller's name or number as it is presented to 8x8 by the caller's phone carrier. ■ **Caller Phone Number**: Shows the caller's phone number. ■ **Destination Number**:Shows the destination number such as web callback. ■ **Dialing Channel**: Shows the channel number the call has been made to or from. ■ **Hangup By**: Shows the party who disconnected the call, such as agent, customer, or system ■ **Hold Count**: Shows the number of times the call was put on hold. ■ **Max Hold Duration**: Shows the longest hold time for each call. ■ **Mute Count**: Shows the number of times an agent has muted a customer. ■ **Queues**: Shows the queue name the call was put into. ■ **Time in IVR**: Shows the amount of time the call was in IVR in hours, minutes, seconds, and milliseconds. ■ **Total Hold Duration**: Shows the total hold duration for each call if a call was placed on hold. ■ **VCC Transaction ID**: A unique ID assigned to each interaction that enters Virtual Contact Center. ■ **Wait Time In Queue**: Shows the wait duration before the caller speaks to an agent.

4. For a quick search in Recent Calls tab, use the free-text search capability.



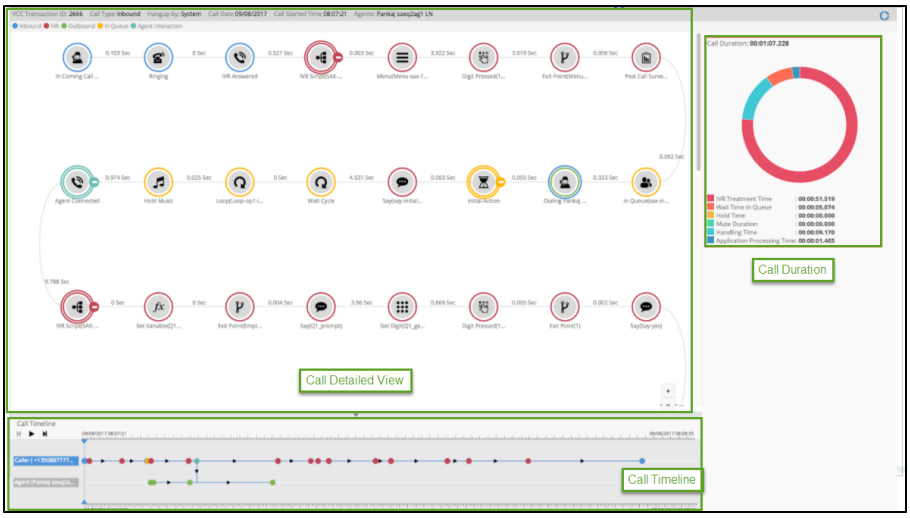
5. To refresh the filtering results, click **Reset**.

> **Notes:**
> -The **Reset** button only refreshes your current search. For a new search, click **Reset**, enter your search criteria, and click **Submit**. If you do NOT select a filter, today's date and time from midnight (00:00) to your current time is automatically selected. If you do NOT select a specific IVR script, all scripts used during the time period is included in the report.
> -If you choose to save your search filters, remember to set the ending time till the end of the day (for example, select 23:45, or type 23:59 manually) to include all calls in that day.

6. To start a fresh search:
   a. Click **Reset**.
   b. Click **OK** for confirmation.
   c. Enter new search filters, and click **Submit**.
7. For more actions:
   - Click or to download your results with today's date and time stamp.
   - Click to log out of Customer Experience.
   - Click under **Actions** to see Call Flow and more information about each individual call.

Access Call Flow

The Call Flow diagram shows each call's journey from the time it enters the contact center until the time the call is terminated. The event information is represented by Icons.



Call flow also tracks multiple call legs in the customer experience. Multiple transaction IDs displayed for a single interaction means that the customer call was involved in multiple legs of communications. This may include multiple agents or queues along the call path.

Call flow provides three visual views of the call journey from the time it arrives in Virtual Contact Center until the time it is terminated:

- **Call Detailed View**: Presents the end-to-end customer interaction, a detailed call analysis of a customer call going through different phases such as: the time an inbound call comes into the system and answered by Virtual Contact Center, the time the IVR script is applied to the call, when the call is forwarded to a queue, and the amount of time the call spends in the queue until the call is terminated. You can collapse or expand the IVR events by clicking **+** or **-** next to the IVR icon. Collapsing the IVR events allows the call center managers to focus more on an agent's call interactions in a call flow.
- **Call Timeline**: Is an interaction recording presenting a linear view of the call journey. When you **Play** the timeline recording, it highlights the IVR events depicted by call flow icons in the order the call was processed through the system. Individual timeline rows are displayed for agents and the caller on separate lines as well as for the inbound leg, agent leg, and customer leg of the calls.

Note: The Play button in Call Timeline, moves through the interactions that are taking place. To hear the call voice recording go to **Monitoring > Playback**.

- **Call Duration**: The Call Duration shows a pie chart with duration time data for the call being viewed. The Call Flow pie chart shows a call's time break-down. The pie chart is read clockwise, and follows the coloring of the legend: IVR Treatment Time, Wait Time in Queue, Hold time, Mute Duration, Handling Time, and Application Processing Time. The Application Processing Time is the total time of a call minus other times spent for IVR treatment, wait time in queue, etc. during a call.

The following table shows the top row legend in the call flow diagram that presents critical information pertaining to the call:

Legend	Description
VCC Transaction ID	Indicates the unique ID for each leg of the call. A Virtual Contact Center Transaction ID is assigned to each interaction that enters Virtual Contact Center. For example, two transaction IDs indicates the call has been transferred.
Call Direction	Indicates if the call is an inbound or outbound call.
Hangup By	Indicates if the call is ended by the agent, customer, or system.
Call Date	Lists the date of the call in MM/DD/YYYY format.
Call Start Time	Lists the start time of the call in HH:MM:SS format.
Agents	Lists the name of the agents that handled the calls.
Tenant	Presents the name of your tenant.

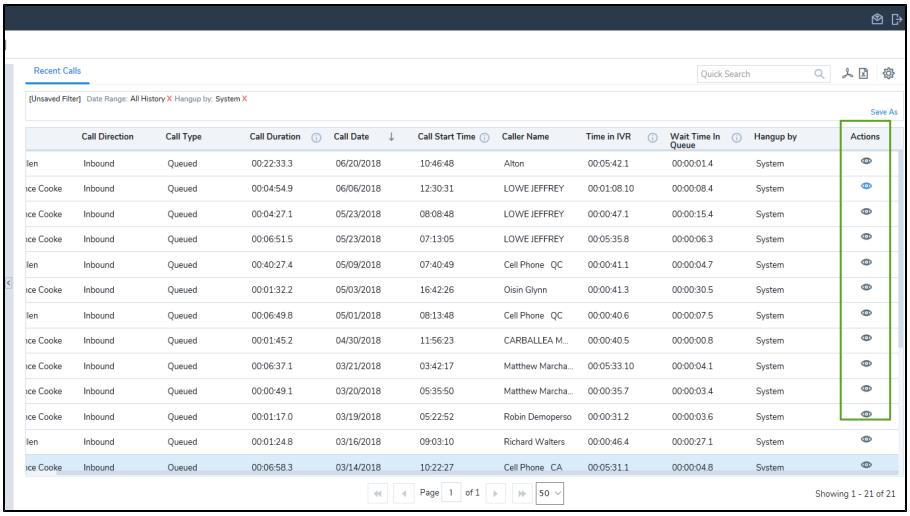
The following table shows different groups of icons in a Call Flow, designated by colors. Each icon represents an event or activity that is taking place during the call. Hover over or click each icon to see an information box. The IVR events can be collapsed and expanded by clicking + or - next to the icon. In long calls, it helps focus on agent call interactions.

Available Icons	Description
Inbound	Indicates incoming calls, when the call is ringing, and when the call is answered.
IVR	Indicates IVR script events such as forward to queue, say, or get digit, schedule, open, closed. You can collapse oexpand the IVR events by clicking **+** or **-** next to the IVR icon. It helps focus on agent call interactions.
Outbound	Indicates outbound events, such as dialing an external number, Queued call back or a Post Call Survey call back.

Available Icons	Description
In Queue	Indicates the duration of time the call waited in queue .
Agent Interaction	Indicates the actions and events handled by the agent.

To access call flow:

1. In the Customer Experience dashboard, click to open **Recent Calls**.
2. Click next to the desired call record, or double-click a call row to launch and display the Call Flow diagram.



Example

In the following example, the call flow presents a simple call coming to the queue, answered by the first agent and transferred to the second agent in the same queue.

1. The call comes in to Virtual Contact Center.
2. The call is treated with an IVR and the caller selects an option from the IVR menu. The call is then forwarded to a queue.
3. The call is offered to an agent; the agent's workplace phone number is being dialed. The agent accepts the call to connect with the caller.
4. The agent transfers the call to the second agent.

3. For more actions:

- Click ▶ in **Call Timeline** to track the call journey.
  The tracker takes you to every second of the call highlighting the event.
- Click to show and hide **Call Duration** details.
- Click to close the Call Flow browser window.
- Click to log out of the Customer Experience application.

Access Dominant Paths

The Dominant Paths dashboard is used for more complex IVRs with many menu choices such as the ones in an enterprise. It provides a high-level view of your contact center's IVR, or a summary of your top ten most-used IVR paths in the tenant. The numbers on each path represent the total number of calls going through that specific path. It helps you figure out which IVR objects are used by your callers as expected and which paths are not. With this information your can assess requirements to optimize your IVRs.

For example, in the Acme Health clinic, the contact center is using a complicated IVR with eight menu options (1-8). A Dominant Paths report shows that only the first five menu options are used by callers, and the last three menu options do not get any attention by callers. With a careful study of the report, the supervisor is convinced that the last three paths need to be revised or eliminated to improve the efficiency and accuracy of the IVR.

To access Dominant Paths:

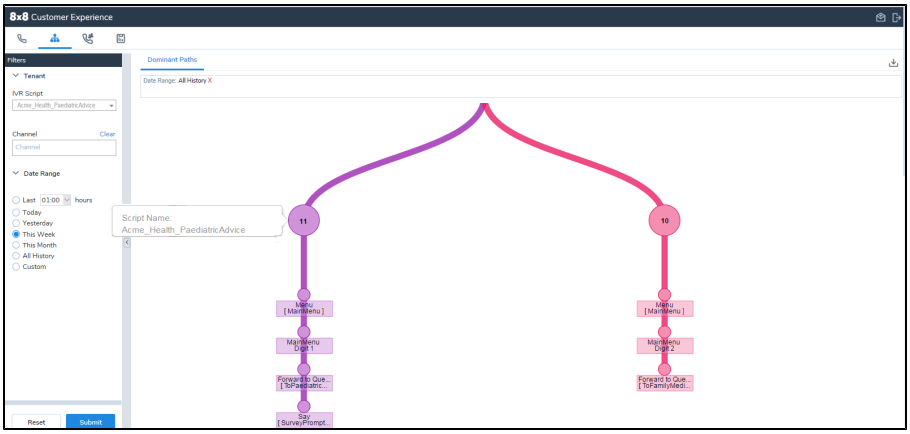
1. In the Customer Experience dashboard, click to open **Dominant Paths**.
2. Apply the desired filters.
   The following table shows the filters available for Dominant Paths:

Available Filter Groups	Description
Tenant	■ IVR Script: Select the IVR script from the list. You can select one script at a time. If you do not select any scripts, all scripts used for the time shown appear in the report. ■ Channel: Select the channel number used to direct the calls.
Date Range	Choose the date range of the desired report, such as today, this week, or the last certain number of hours.

3. Click **Submit**.
   The dominant paths appear, showing the most frequently-used IVR paths in your contact center. Each path shows the total number of calls that have gone through the path.
4. Click on any node in Dominant Paths to open the Detailed Calls slider and view the basic call information of all calls passing through that node. To see the call flow, click . To access more details in the Recent calls table, click **View in Recent Calls**. Click **Back to Dominant Paths** to go back.

   Example

   The following dominant path shows in the Acme Health clinic example; all entering calls have gone through the same script. Eleven callers have selected Option 1 for a survey, and ten callers avoided the survey and selected Option 2 in the IVR. All calls have been transferred to the queue of the pediatrics department.



5. To refresh your search, click **Reset**.
6. For a new search, enter new search filters, and click **Submit**.
   For more details, see how to refresh your search results.
7. For more actions:
   - Click in the top-right corner to download the image with today's date and time stamp.
   - Click to log out of Customer Experience.

Access IVR Metrics

The IVR Metrics presents caller behavior and routing in an active graphical format. It provides details of what happened to the dropped calls and validates a good IVR. The IVR Metrics dashboard shows the path taken by every single call entering your contact center. It visually represents the number of calls that enter the IVR plus the calls hung up while drilling down the IVR path taken during the specified time period.

In IVR Metrics, the biggest node with the highest number shows the total number of calls entering your contact center. If you hover over each node, it shows the IVR scripts and associated channels used for that node, separated by commas. The smaller nodes show the IVR script and object used. When a node is selected in the tree, the traffic coming to that node is shown. Caller Hangup on IVR metrics provides useful data for supervisors regarding the calls terminated by callers before being accepted by any agent.

You can use IVR Metrics to understand the usability of scripts, identify flaws (if any), and improve your IVR design. It helps you find out where the callers have most problems following the IVR or where they opt out of the calls. Sometimes a confusing IVR announcement can direct the customers to a wrong selection and eventually cause them to drop the call and have a undesirable customer experience.

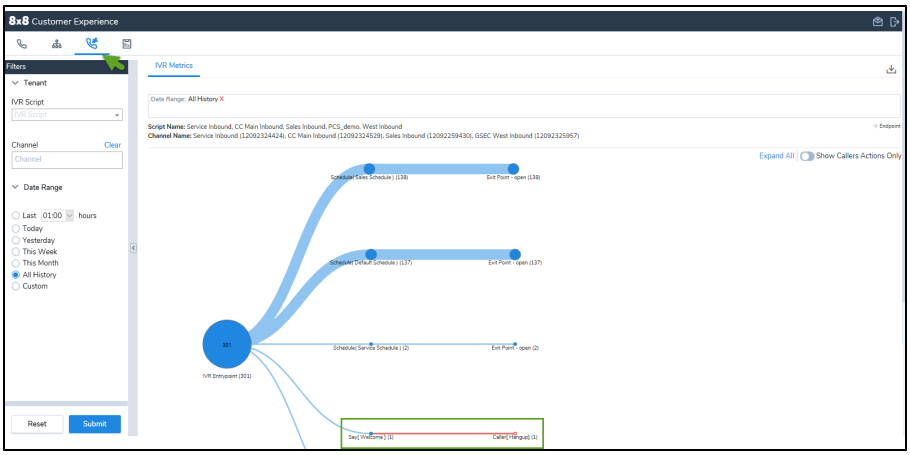
For example, in the Acme Health clinic during the flu season, a high volume of calls comes in inquiring about flu shots. You do not have enough staff to keep up with the number of calls; as a result, the wait time in the queue goes up, causing dissatisfaction among callers. After consulting with your agents about the nature of the incoming calls, you incorporate an option in the IVR announcing the dates and time the clinic offers flu shots. By implementing the new IVR, you realize the number of calls goes down. IVR Metrics helps you study the details of calls and verify if an IVR update has pointed the callers in the right direction.

To access IVR Metrics:

1. In the Customer Experience dashboard, click to open IVR Metrics.
2. Apply the desired filters.
   The following table shows the filters available for IVR Metrics:

Available Filter Groups	Description
Tenant	■ IVR Script: Select the IVR script from the list. You can select one script at a time. If you do not select any scripts, all scripts used for the time shown appear in the report. ■ Channel: Select the channel number used to direct the calls.
Date Range	Choose the date range of the desired report, such as today, this week, or the last certain number of hours.

3. Click **Submit** to display IVR Metrics.
   If you hover over the biggest node, it shows all the scripts and associated channel numbers being used. Click the last node once to see the next object, such as Forward to Queue or Say.



4. Click any node label to open the Detailed Calls slider.
   You can not only view the number of calls passing through each node, but also access the details of those calls

such as the caller's name, date and time the call was made. To see the call flow, click next to a call. To see more details in the Recent calls table, click **View in Recent Calls** inside the slider. Click **Back to IVR Metrics** to go back.

5. Enable **Show Callers Actions Only** to see the caller's actions.
   This feature helps you with IVR diagnosis. You can look at the callers actions, for example, to see why many calls are dropped off when they reached a certain node in your IVR, or how many callers navigated through a certain option in IVR.

   Note: The following nodes are displayed in the callers actions mode: DTMF (Menu, GetDigit, Agent Extension), Exit Points (Forward to queue, Forward to voicemail, Forward to external number, DefaultT, IVR hang-up), and Customer Hung-up.

6. To see the tree expanded to the last node, click **Expand All**.
7. To refresh your search, click **Reset**.
8. For a new search, enter new search filters, and click **Submit**.
   For more details, see how to refresh your search results.
9. For more actions:
   - Click in the top-right corner to download the image with today's date and time stamp.
   - Click to log out of Customer Experience.

Access Post Call Survey

A Post Call Survey is a questionnaire presented to the caller at the end of a call, typically to collect feedback about the quality of service offered by the company. Companies use a survey to gather feedback from customers, and analyze the collected data to help improve their services. You can get feedback on the overall product quality or service quality, get to know the customer satisfaction, and take corrective actions.

The Customer Experience application allows supervisors to review the survey results. It provides the Summary and Detail report for each question presented in the survey. If supervisors wish to look at how callers are rating their agents or service quality, they can access the respective scores and investigate further. The survey results can be filtered by script name, agent groups, agents, queues, and date range. For inbound queued calls, you can filter survey results by agent groups, agents, and queues only.

To access Post Call Survey, in the Customer Experience dashboard, click to open Post Call Survey. Refer to the Post Call Survey guide for more information.

GLOSSARY

A

Administrator

The person who uses the Configuration Manager to configure the contact center's resources and behaviors. An Administrator can be the Primary Administrator with unrestricted access to all the configuration objects or a Role Based Administrator with full or partical configuration rights.

Agent

Agents use the Agent Console to view and manage customer interactions. Virtual Contact Center supports Regular agents and Supervisor agents.

Agent Console

Virtual Contact Center's browser-based graphical user interface (GUI) used by Agents to manage customer interactions.

Application Programming Interface (API)

An application programming interface (API) defines the way an external program can request services from another program. See also, Virtual Contact Center Integrations.

Automatic Call Distribution (ACD)

ACD uses the number called and programmable call distribution logic to route incoming telephone calls to agents with the skills necessary to efficiently process the interaction.

Automatic Number Identification (ANI)

ANI identifies the origination number of a call offered to an Agent.

B

Billing Telephone Number (BTN)

For customers with multiple separate telephone numbers, the BTN consolidates those multiple numbers under a single phone number for billing purposes.

C

Call Treatment Choice

Refers to choices within a schedule which allows a time based selection of treatment choices when interactions enter a Virtual Contact Center tenant.

Caller Name (CNAM)

An enhanced Caller ID feature that displays both the number and name

for an incoming voice call. To provide the value-added CNAM service, the carrier uses the originating caller's phone number to locate the caller's name in the carriers' names database, then transmits both the number and name to the CNAM-enabled customer.

Calling Line Identifier (CLI)

The intended display number of the calling party. In some network configurations, the CLI contains the calling party's Billing Telephone Number (BTN) or Charged Party Number (CPN) to be displayed instead.

Channel

Phone, email, or Web chat interactions arrive at a tenant on a channel. Virtual Contact Center uses skills based routing rules to place interaction requests into the appropriate Queue.

Collaborate

See Desktop Sharing.

Computer Telephony Integration (CTI)

CTI allows data associated with an incoming call or chat request to be presented to the responding agent in real-time. Virtual Contact Center CTI typically presents this data as a "screen pop".

Configuration Manager (CM)

The portion of the Virtual Contact Center application used by the contact center's administrator to define and configure the resources and operational behaviors of the center's tenant.

CRM API

The CRM API component of the Virtual Contact Center Integrations enables third-party processes to access the internal CRM data.

Custom Role

An administrator defined role with custom privileges is called a custom role. Any role other than the system defined Super User role is referred to as the custom role.

Customer Relationship Management (CRM)

The Virtual Contact Center CRM stores the contact center's customer, case, and follow-up data. Numerous third-party CRM products also exist. Two examples of third-party CRM applications are Salesforce and NetSuite.

D

Desktop Sharing

If authorized, an agent can use the Collaborate Desktop Sharing feature to view and control a customer’s

remote computer for purposes of providing assistance.

Direct Agent Access

In an IVR script, direct agent access permits a caller to reach an agent directly rather than through skills-based routing logic.

E

Email Script

A set of instructions that determine and direct the treatment and routing of an incoming email interaction.

G

Group

A group is a collection of agents created for management or reporting purposes. Groups can be functional (for example, Technical Support) or organizational (for example Supervisor Mary's Team). Each agent can be assigned to only one group, and cannot view or access information about other groups or group members.

I

Interactive Chat Response (ICR)

Interactive Chat Response specifies the message sent in response to a new chat interaction.

Interactive Voice Response (IVR)

IVR enables touch tones to guide customer interaction with the contact center. For example, an IVR script could direct a caller to Press 1 to be connected to Sales or Press 2 to be contacted to Support.

Intra Day Scheduler

Refers to the functionality of the tenant that allows creating multiple recurring choices within a day.

IVR Script

A set of instructions that prompts callers to choose options, then uses those choices to determine the optimal routing of an incoming phone interaction. See also, Interactive Voice Response.

O

Outbound Phone Codes

Outbound Phone codes offer a means to set a specific calling line identifier (caller ID) and optional outbound queue for outbound calls from your tenant. Outbound Phone Codes also may be used to track the purpose of an outbound call.

P

Primary Administrator

An adminstrator with unrestricted access to all the configuration objects in the Configuration Manager.

Q

Queue

A queue is an ordered collection of interactions waiting to be served by agents qualified to respond to these interactions. In addition to enabling the call center administrator to customize how incoming interactions are prioritized and routed, queues also ensure that interactions are never lost or discarded.

R

Reporting API

The Reporting API component of the Virtual Contact Center Integrations enables third-party processes to access statistical reporting data, and status information.

Responsible Organization (RespOrg)

The entity that controls and maintains a phone number. Telephone carriers are the most common type of RespOrg. 8x8's provisioning department processes the RespOrg orders required to direct your contact center's phone numbers to your Virtual Contact Center client

Role

A role defines a set of privileges to configure a Virtual Contact Center tenant. A role can be system defined or administrator defined.

Role Based Administrator

An administrator who assumes a role with full or partial configuration rights to the Virtual Contact Center.

Role Based Management

Role Based Management is the functionality of Virtual Contact Center that allows a tenant to distribute the configuration management functionality among multiple roles.

S

Screen Pop

The Screen Pop component of the Virtual Contact Center Integrations enables third-party CRMs to display information in the Agent Desktop. See also, Computer Telephony Integration.

Service Level Agreement (SLA)

A commitment to process some number of interactions within a specific period of time. Service Levels are generally defined as X percent of interactions answered within Y

seconds measured over Z minutes. In the Configuration Manager, use a queue's SLA tab to generate an alert whenever interaction processing levels fall below a specified commitment level.

Skill

A qualification that associates a particular queue to an agent.

Skill Levels

For each agent, Virtual Contact Center uses high, medium, and low skill level identifiers to prioritize the distribution of interactions across the pool of available agents.

Status Codes

The Status Codes feature enables agents to supply supplemental information about why they changed their state. Status Codes provide enhanced workforce planning and management. For example, status codes could be created for different categories of breaks such as Break for Lunch, Break for Meeting, and so on.

Super User

The system defined role with unrestricted access to configure all administrative areas of the Configuration Manager. Primary Administrator inherits the Super User role automatically. Multiple administrators can be assigned to the Super User role. Privileges to the Super User role cannot be edited or revoked.

Supervisor

An agent with the supplementary privileges required to create FAQ categories and answers, monitor agent interactions in progress, listen to recordings of previous interactions, and create reports for the agents groups they supervise.

Support Center

In Configuration Manager, use the Support Center page to create customer-facing support Web page for your contact center, and specify the contact -- FAQs, desktop sharing, chat, email -- available from that page.

T

Tenant

Your unique and secure contact center instance running on a 8x8 platform. You use the Configuration Manager to create and configure all aspects of your contact center's resources and operational behaviors, including groups, incoming channels, queues, agents, routing scripts, skills, monitoring, recording, and reporting.

Transaction Code

The Transaction Codes feature enables agents to supply

supplemental information about the reason for or outcome of an interaction. Transaction codes provide enhanced metrics or enable the calling line ID on an outbound call to be modified. For example, transaction codes could be created for different categories of sales activities such as Initial Contact, Prospect, Customer Satisfied, and so on.

Triggers

The Triggers component of the Virtual Contact Center Integrations invokes a remote third-party process whenever an agent creates, deletes, or edits internal CRM record.

V

Virtual Contact Center

A contact center that enables agents to be located in different geographical locations yet managed as if they were located in the same physical location.

Virtual Contact Center Integrations Suite

An optional package containing the CRM API, Screen Pop, Triggers, and Reporting API components.

Voice over IP (VoIP)

The use of the Internet Protocol (IP) to carry telephone calls.

W

Wallboard

The 8x8 Wallboard for Virtual Contact Center presents real time metrics of your contact center operations allowing supervisors to manage customer demand proactively.

Web Application Programming Interface (WAPI)

Deprecated term for the optional 8x8 Integrations package.

Weekly Schedule

Defines recurring day-of-week/time-of-day treatment choices. These are typically normal business hours. Schedules follow the defined weekly pattern unless superseded by date-specific Special Events.