8x8 Global Cloud Communications

Virtual Contact Center

Agent User Guide

Contents

Overview: 8x8 Virtual Contact Center for Agents

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. Virtual Contact Center 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.

If you are an agent, your contact center supervisor provides you with the information you need to access your Agent Console account, your contact center policies, and guidelines to use that account. For details about our latest Virtual Contact Center features, see What's New for Agents.

For details on how to start using this guide, see our content on Get Started and Tour Your Interface.

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:
  - Google Chrome (Build 50 or newer)
  - Mozilla Firefox (Build 39 or newer)

- Microsoft Internet Explorer 11
- Microsoft Edge

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

Known Issue: If you use Internet Explorer to run Virtual Contact Center applications, you may encounter high memory usage. To resolve this issue, clear your browser cookies and cache, activate the setting to clear history, clear history on exit, and reboot.

Note: Virtual Contact Center is partially compatible with Safari, offering support for the Agent Console Control Panel functionality.

Note: Firefox requires the QuickTime plug-in for audio features.

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 9.9 Release for Agents?

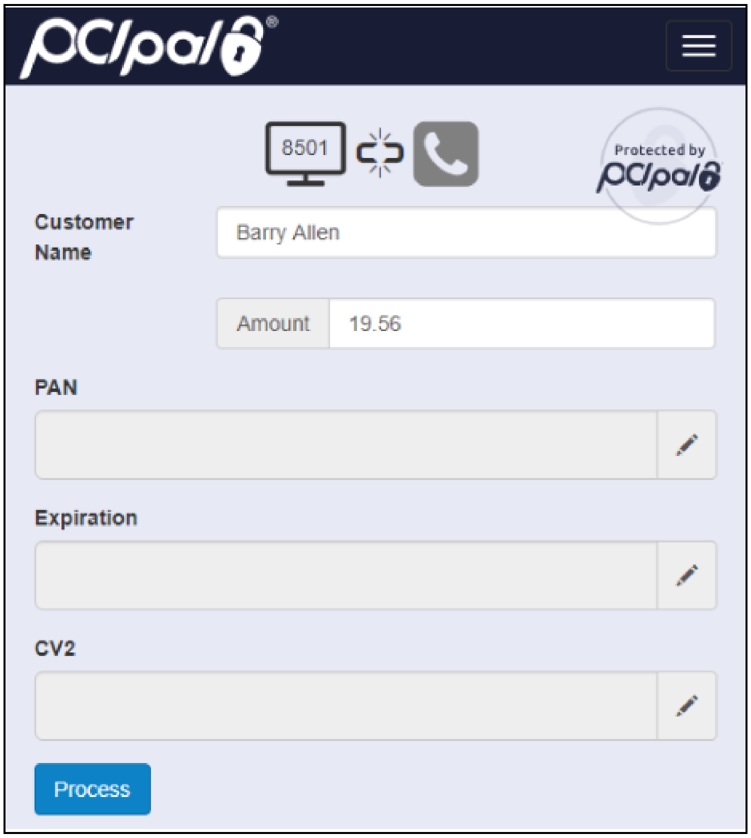
We have introduced the following new enhancements to improve the productivity of agents in this new release of 8x8 Virtual Contact Center.

Introducing 8x8 Secure Pay

8x8 Virtual Contact Center now offers customers a secure integration to support the processing of bank card information via our partner PCI Pal. 8x8 Secure Pay enables an agent and customer to stay in contact on a call while masking the card input from the customer's handset so that the sensitive card data stays secure and out of the scope of contact center. The service can be integrated with a CRM, Enterprise Resource Planning (ERP), or a billing system and the corresponding payment gateway to process the payment. The service can also feed information about the payment back to the originating system.

This new integration offers agents a secure payment page for processing customer transactions. The secure payment page can be configured to include pre-populated data or data that the agent adds manually. When this page is opened, the customer audio is rerouted via PCI Pal, which allows them to mask the keypad input both visually and audibly.

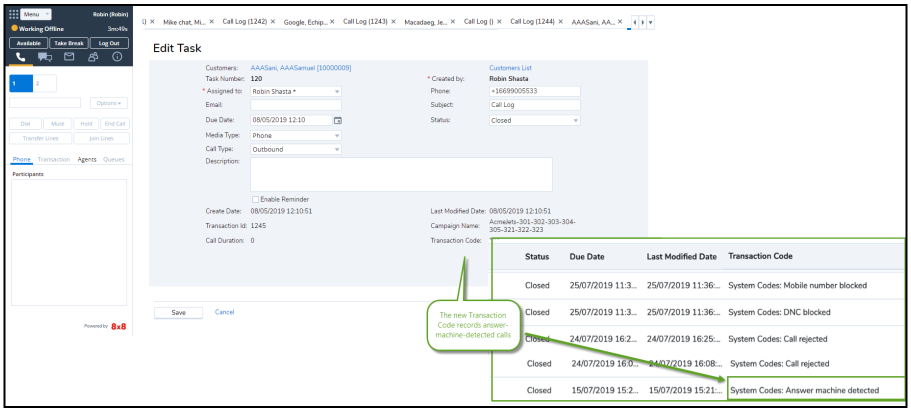
The agent hears the conversation and controls the card input, but only hears a single-tone DTMF and sees starred out digits for the card number, date, and Card Verification Value (CVV). In the event of erroneous data input by customers, agents can reset the relevant data field in the payment page, allow customers to fix the input, and facilitate a successful transaction. For details on when an agent can use this feature, see how to manage card payment via 8x8 SecurePay.



Introducing the Answer Machine Detection (AMD) Service

In 8x8 Virtual Contact Center when the dialer is used in its aggressive mode, it can call more numbers than available agents, to maximize agent efficiency. We have now introduced a service that detects calls answered by a machine, instead of people and filter them from being offered to the available agents. This saves agents time and improves their efficiency while processing campaign calls. The calls answered by machine are automatically resolved before being routed to available agents. For details, see our content on how to improve campaign call handling via answer machine detection service.

Note: The AMD service is not applicable to the outbound calls placed by an agent, but the calls routed via campaigns.



Ability to Detect TCPA-Listed Phone Numbers via Carrier Call Blocking (CCB)

8x8 Virtual Contact Center is now able to detect TCPA-listed phone numbers via Carrier Call Blocking (CCB) service. This feature is available for US customers only. The Telephone Consumer Protection Act (TCPA) designed to safeguard consumer privacy restricts telemarketing communications via calls, SMS texts, and fax. To comply with TCPA, we have introduced Carrier Call Blocking (CCB) service for campaign calls which will then checks whether or not the phone number is listed on a Do Not Call (DNC) or mobile block list. If listed, the call is terminated by the carrier and an appropriate Session Initiation Protocol (SIP) code response is sent back to the interaction router. The call is then handled by Auto TCL and assigned an appropriate transaction code such as "Answer machine detected" for a prompt call wrap up. For details, see our content on how your campaign call handling is improved by TCPA-list ed and CCB service.

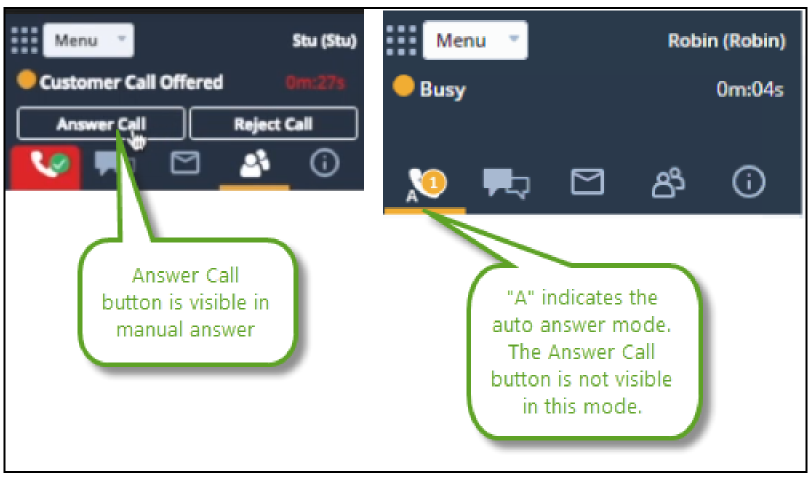
Improved Call Handling via Phone Connection Mode and Auto Answer

8x8 Virtual Contact Center has improved the existing call handling capability via two features: Phone Connection Mode and Auto Answer:

- **Phone Connection Mode**: Agents set up their voice connection before they start working on calls and remain connected throughout their working day. It allows them to respond to incoming and outbound phone calls with a simple click on the user interface improving their call handling efficiency. If allowed by administrators, agents can choose On Demand or Persistent Phone Connection Modes. There is no audio indication with the Phone Connection Mode. For details, see our content on Phone Connection Mode.

Note: The Off-hook connection mode that was first introduced in 9.8 has been renamed to Persistent Connection Mode. There is no change to the functionality, but just the terminology. For details, see our content on how to enable Persistent Connection Mode.

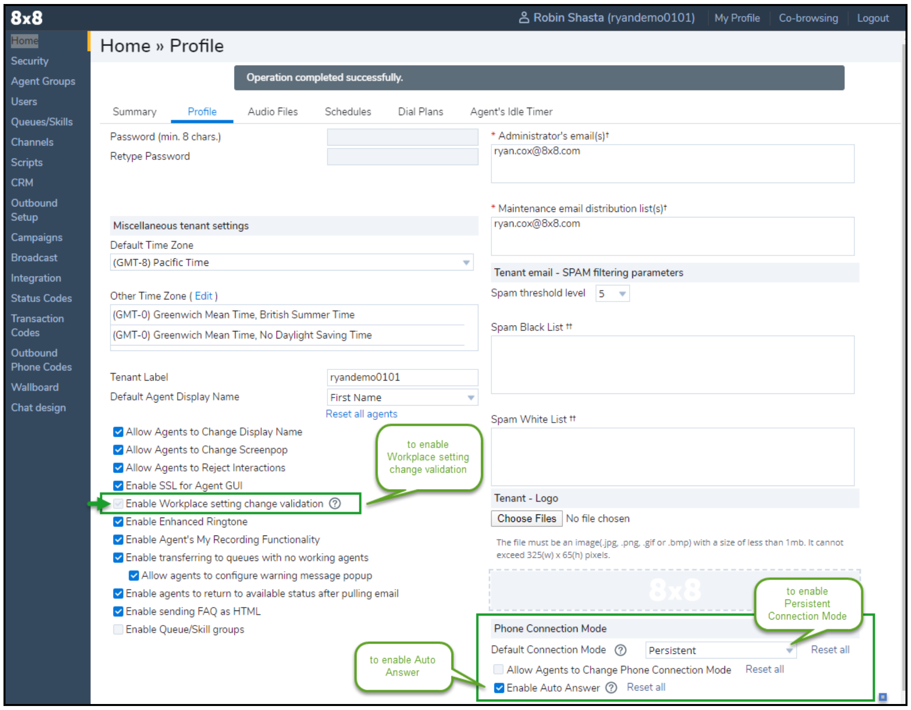
- **Auto Answer**: To further enhance the call handling efficiency of agents, we have now introduced Auto Answer. With this new feature, every phone interaction that is offered to an agent is automatically connected eliminating the need to accept it manually. This new configurable option enhances agents efficiency by quickly connecting the calls and reducing the number of clicks an agent has to make. Auto Answer also helps prevent agents from rejecting or missing calls on their workplace phone. When in Auto Answer mode, agents receive an audio prompt to alert them of a call as it connects. Auto Answer is paired with Workplace Setting Validation and is configurable at the tenant level. To enable Auto Answer, you must also enable workplace setting validation. For details, see our content on how to connect calls to agents automatically.



Note: Auto Answer is currently on limited availability. Contact 8x8 Support for more help.

Introduced Workplace Setting Validation

When changing workplace setting (Workplace Phone and Workplace SIP URI), agents must validate their changes to be able to handle the calls. When they click to validate the change, it triggers a phone call to the updated phone number. A PIN code is then communicated to the agent. The agent must enter the PIN code to validate the changes and continue. If they are unable to confirm the PIN, they must exit and revert to their last validated setting. The workplace setting validation is offered as a mandatory security feature with Auto Answer, or it can be deployed as a stand-alone feature. For details, see our content on Workplace setting validation.



Ability to Automatically Assign Transaction Code (Auto-TCL)

8x8 Virtual Contact Center automatically assigns transaction codes to the campaign calls when the destination party is not available to answer the call, or the call cannot be completed, for reasons such as busy tone or dead line. Automatic transaction codes are also applied to campaign calls answered by a machine. Auto-TCL works with Answering Machine Detection (AMD) service to identify such calls and automatically disposition them. It then moves onto the next call with minimal agent disruption. This feature allows agents to be more efficient with their time. Auto-TCL feature must be provisioned for the tenant and enabled by the administrators. For details, see our content about automatic assignment of transaction codes to campaigns.

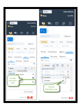
Note: Auto-TCL supports campaign calls only.

Allow Agents to Skip Campaign Calls While on Auto Answer

8x8 Virtual Contact Center is now offering agents the option to skip the campaign calls. For details, see our content on how to skip a campaign call.

Relocated Interaction Transfer Button

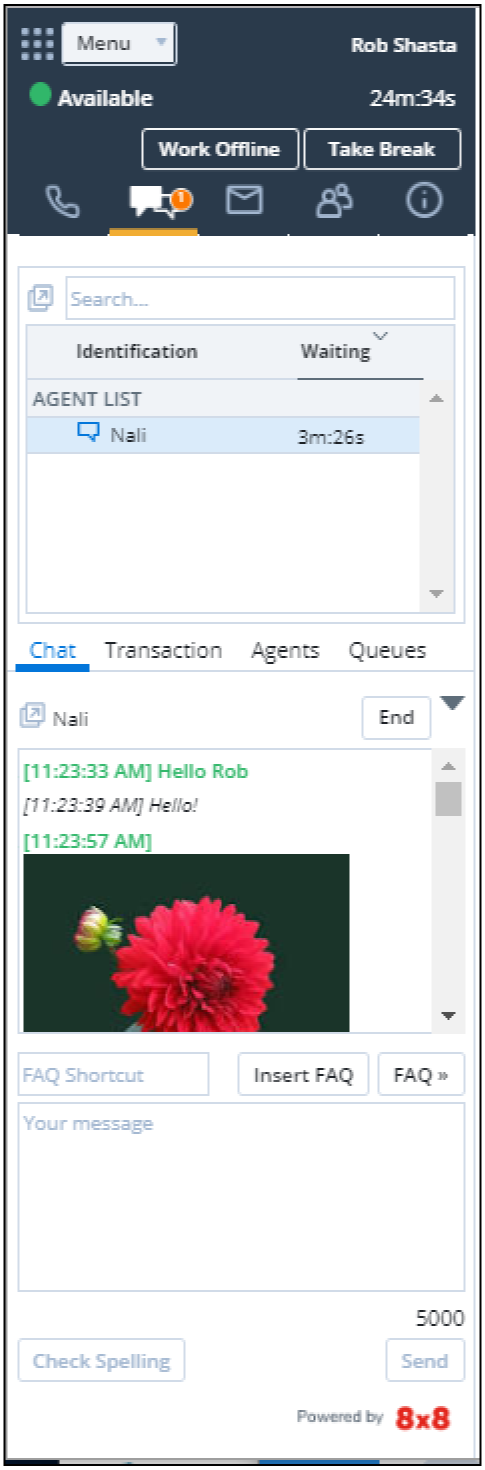
Transfer interaction button is now available in the context menu when selecting an element in the **Agents** or **Queues** lists. The option is available for blind call transfer to an agent or queue, chat transfer to a queue, or email transfer to a queue. Prior to this release, the transfer button was located separately at the bottom of the Control Panel. For details, see our content on transferring phone interactions to another agent, transferring chat interactions to different queues, and transferring email interactions to different queues.



Enhanced Chat Editor and FAQs

We have enhanced our Chat editor and FAQ functionalities in 8x8 Virtual Contact Center chat channel. The chat editor in Agent Console allows you to insert rich media FAQs directly into the messages and share with customers during an interaction. Alternatively, you can insert them as a link to HTML content. The chat editor supports regular text formatting, images, and links.

To insert an FAQ response during a live chat, go to **Help > FAQ** from the Control Panel menu, search for relevant information, insert the rich media FAQ, and click **Send** in the live chat. For details, see our content on how to insert rich media FAQ content.



Note: Tables and more complex HTML elements or contents are not supported by the editor and will always be inserted into the chat as a link to the HTML content.

See our content on all Previous releases.

Previous Releases

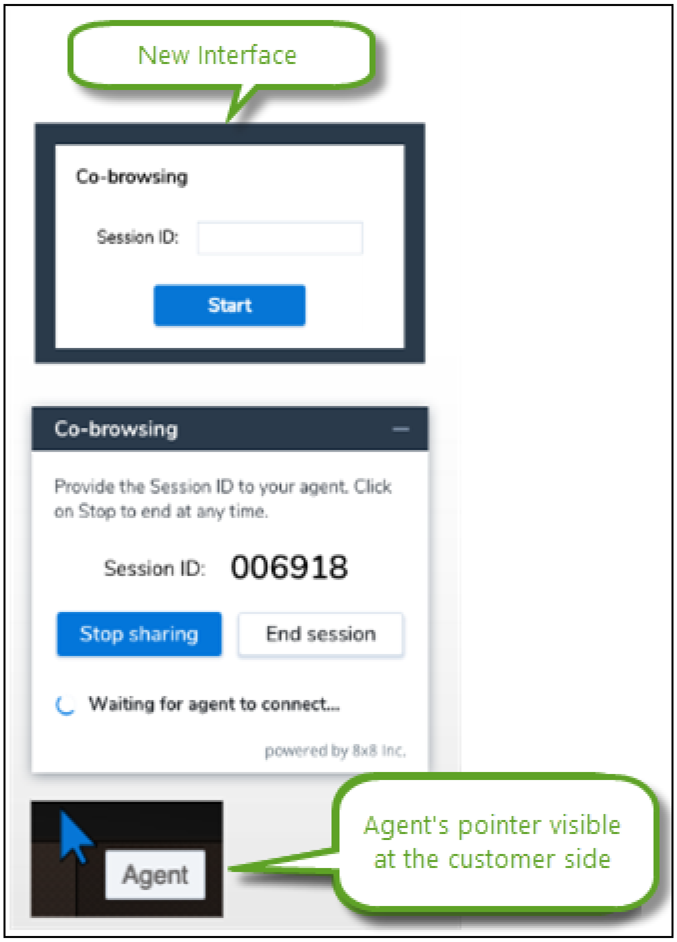
You can find Virtual Contact Center previous releases here:

Release 9.8

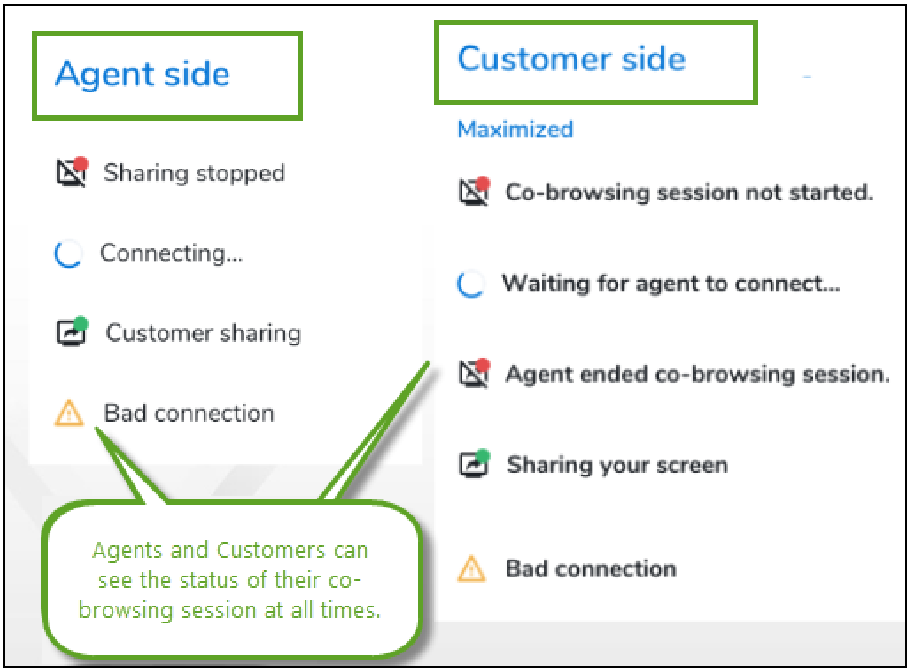
- **Enhanced Usability of Co-browsing**: With Co-browsing, you offer live, hands-on assistance to customers, take control of their cursor, and demonstrate how to perform the action while the customer observes. Via co-browsing, you can securely connect to remote computers, access, and troubleshoot problems over the Virtual Contact Center platform. For details, see our content on how to offer remote customer assistance.

  Customers, who use 8x8 Co-browsing for remote assistance, can now enjoy better usability with the following enhancements.

- A refreshed user interface.

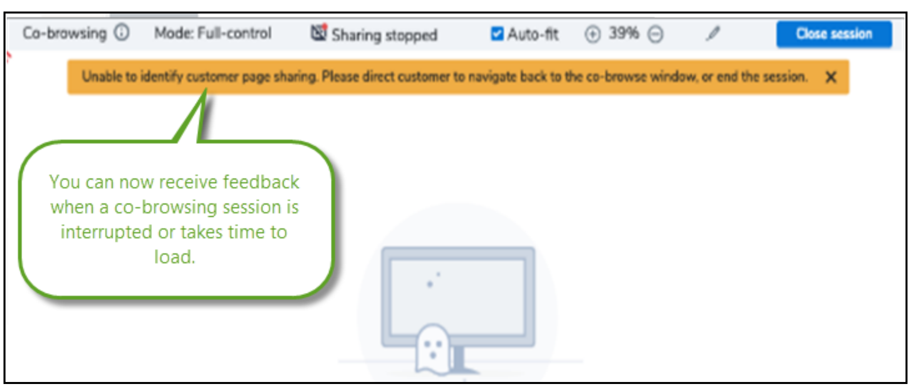


- Better visibility to the status of co-browsing session on customer side.



- The auto-minimized status window allows the customer to keep an eye on the status of the shared screen at all times. The customer can move the status window to the desired location while in a live session.

- Agents receive feedback when the co-browsing session is interrupted, or takes time to load.



- **Ability to Reset the Agent's Idle Timer**: In Virtual Contact Center, idle time refers to the length of time agents have been idle and is measured for each agent by the agent's idle timer. By default, an agent is considered idle from the time he ends post processing of a system-delivered interaction and becomes available. When multiple agents with the same queue and skill level assignments are idle, the system routes the call to the agent who has been idle the longest. The agent's idle timer is reset every time they end post processing of a system-delivered interaction. This reset persists until the same scenario is repeated. Agent-initiated interactions do not reset the idle timer.

  To supplement the default behavior, we now allow Virtual Contact Center administrators to reset the idle timer when agents transition from one status to another. For example, The idle timer resets when agents change their status from On Break to Available when they log in. For details, see our content on idle time during phone Interactions.

- **Ability to Autodial Campaign Calls after Preview**: In this release, we have introduced the ability to autodial campaign calls when an agent has spent all the preview time without taking an action. Autodialing campaign calls after previewing a campaign record is controlled by a campaign setting by your contact center administrator.

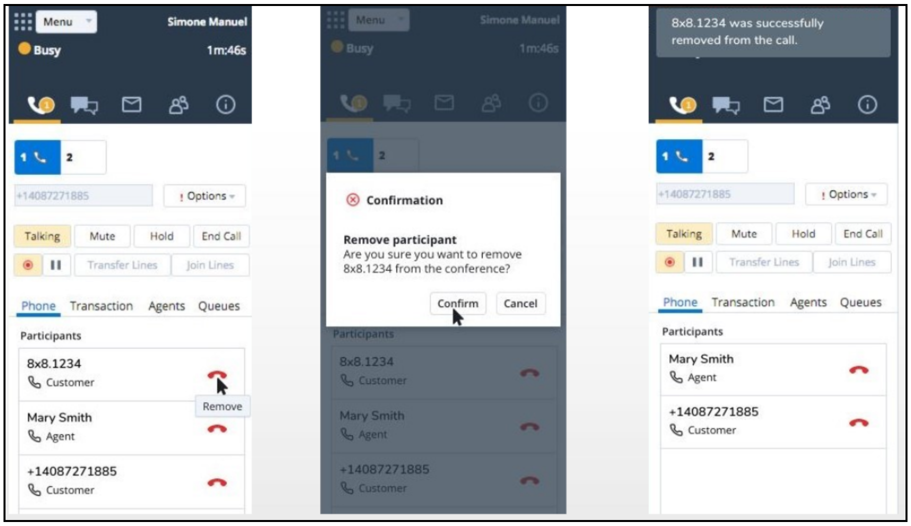
  > **Note:** This feature enhancement is only applicable if your company uses Virtual Contact Center campaigns.

  Prior to this release, agents handling a campaign could view the campaign record for the specified preview period and manually start, reject, or skip the interaction. They were not forced to take the interaction in the time allowed. Additionally, the need for a manual action to initiate a call was repetitive and inefficient. With the autodial feature, however, at the end of the preview time if no action is taken, calls are initiated automatically eliminating the need for manual action by the agent. The Virtual Contact Center administrators can enable autodialing for each campaign when an agent's preview countdown ends. The minimum preview duration is 15 seconds. For details, see our content on what happens if your tenant is set up for autodialing campaign calls.

- **Improved Control of Conference Calls**: We have now introduced the concept of a Host and added hierarchical control to conference calls. In this new behavior, the host can remove participants without requesting them to take any action. When a conference call is created, the longest connected agent becomes the host, unless there is a supervisor present, in which case, the supervisor will be the host. The host is then dynamically transferred when participants join and leave the call. For example, when a supervisor host leaves a call, the ownership passes to the next longest present supervisor, or if none are on the call, to the longest present agent.

  Prior to this release, when agents, supervisors, and other participants were on a conference call, agents and supervisors relied upon the goodwill of participants to drop their connection and leave the call. To remove a participant as a host, while in a conference call in Agent Console, click next to the participant's name and click

Confirm. For details, see our content on how to remove an agent from a conference call.



- **Efficient Voice Channel Workflow via off-Hook Mode**: With off-hook connection mode agents can instantly and seamlessly connect to customers and improve their productivity. Off-hook is a Persistent Connection Mode from the agent’s device to Virtual Contact Center. It removes the need to connect the agent’s workplace phone for every call handled. Agents set up their voice connection before they start working on calls and remain connected throughout their working day. It allows them to respond to incoming and outbound phone calls with a simple click on the user interface.

  In the previous behavior, after agents log in to Virtual Contact Center and make themselves available, they have to accept the interaction for every call that comes through the queue. If they miss the ringing phone, they will no longer be available to take the interaction.

  If enabled by your contact center administrator, you can click **Enable Off-hook Connection** in Agent Console's user profile. For details, see our content on how to enable and work with off-hook connection mode.

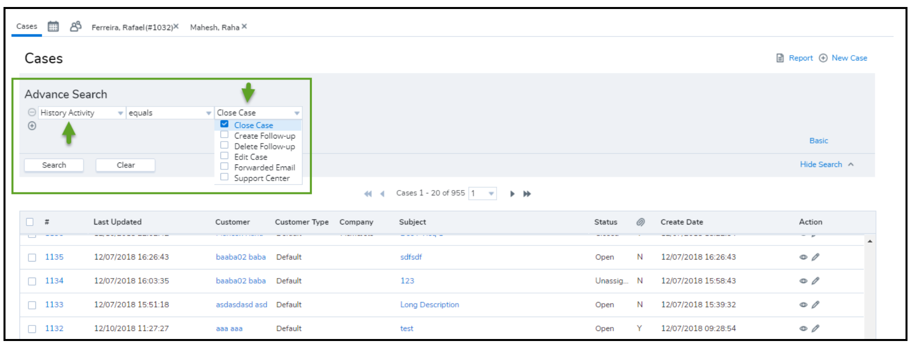
Release 9.7.3

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.

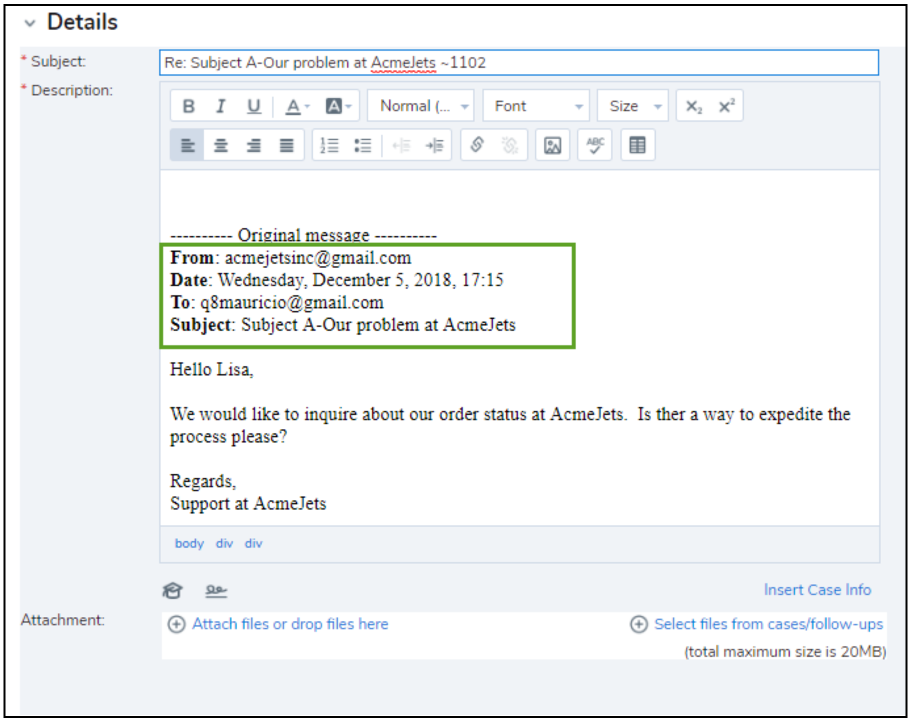
The following are features and enhancements introduced in recent product releases:

- **Access to Related Emails Improves Customer Experience**: Agents can now access queued emails from the same customer, review and respond to them at once. When a customer sends multiple emails within a short time interval regarding a case, all emails get queued. When an agent opens the first email to respond, there is a link to view the queued emails from the same customer. The agent can now click this link to view all the queued emails, and review and respond in a single email if they are related to the same case. This helps agents consolidate their response in a single email and increase their efficiency while improving the customer experience. For details, see our content on how to access customer's related emails.

- **Improved Search Filter for Closed Cases in History Activity**: We have introduced a new filter to search the closed cases in History Activity. This feature helps supervisors investigate customer complaints regarding an agent's lack of response. It particularly helps investigate a case that has been accidentally closed by the agent. For example, when processing related emails from a customer, an agent may close a case assuming it is related to the case he has reviewed. The unhappy customer may escalate the issue. With the improved search filter, the customer's complaint is now easier to track. For details, see our content on searching closed cases in history activity.



- **Enhanced Email Header in a Case Response**: When you respond to a case or a follow-up, the response automatically includes the email header. The header shows information about sender, recipient, subject, date and time. This enhancement facilitates crafting a response quickly. To see the improved email header, click **Reply** to a customer case or follow-up and check the email's description window. For details, see our content on how to respond to emails.

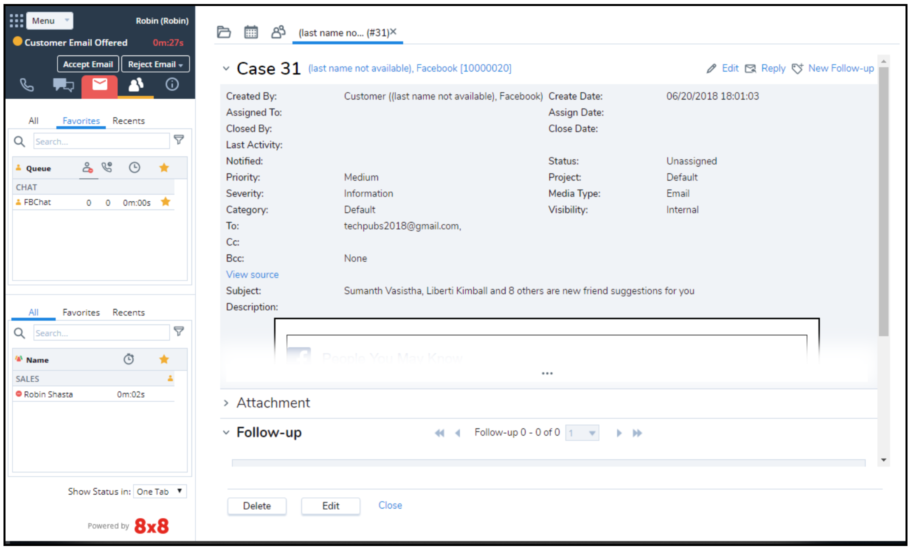


Release 9.7.1

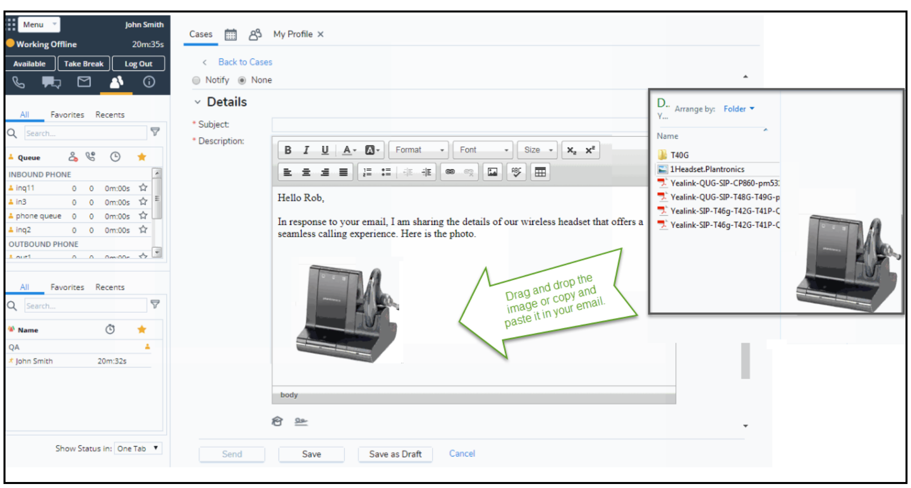
We have introduced some performance improvements and bug fixes in this release.

Release 9.6

- **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.

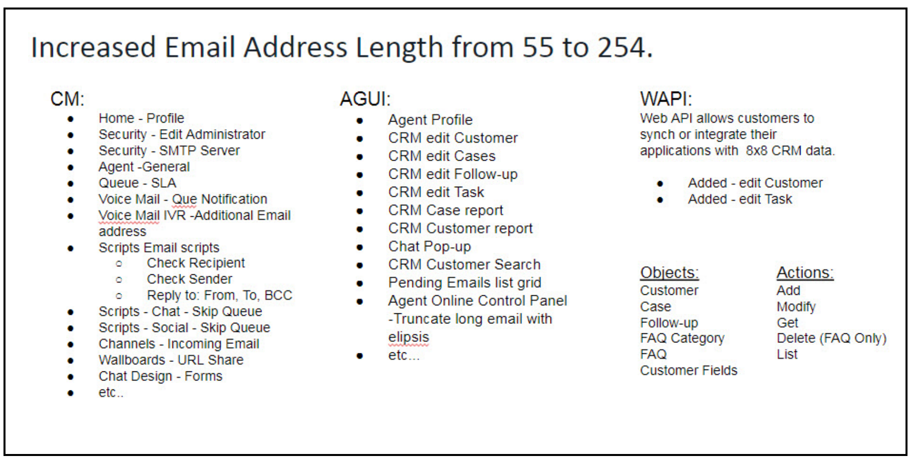


- **Ability to message customers via Facebook and Twitter:** Take advantage of Facebook and Twitter to service customers directly and increase customer satisfaction with Virtual Contact Center Social Integration. By unifying the agent experience, 8x8 Social allows users to channel their messages from social media into Virtual Contact Center. Customers can contact the businesses and receive support from within their social platform. Virtual Contact Center Social supports messaging via Facebook and Twitter in this release.To receive chat interactions, agents must be assigned to an enabled chat queue and be in Available state. See how to handle social interactions.
- **Enhanced usability of rich text editor**: Agents using the Local CRM can now craft their cases and follow-ups using the updated rich text editor. Drag and drop your images or paste them from your clipboard quickly improving your productivity. See Insert Images in Case Description.



Known Limitation: 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. Only supervisors can create or edit FAQ categories and answers. See how to insert an FAQ from the Cases tab or Chat window.
- **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. See how to configure your user profile and email address.



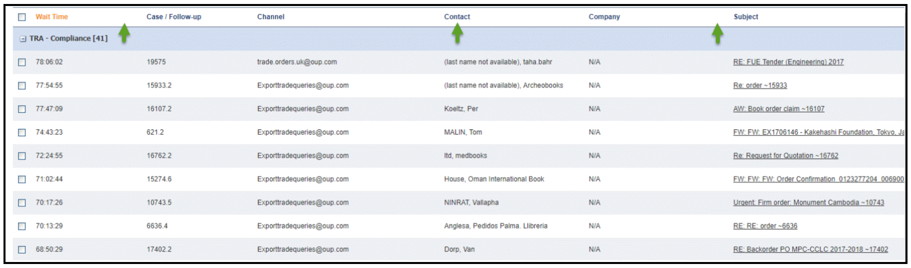
- **Compressed embedded images**: When you embed a high resolution image in your case, follow-up, or an FAQ, they are compressed automatically for faster processing and for saving bandwidth. Simply drag and drop the desired images into your content. See how to Insert Images in Case Description.

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.

Release 9.5.2

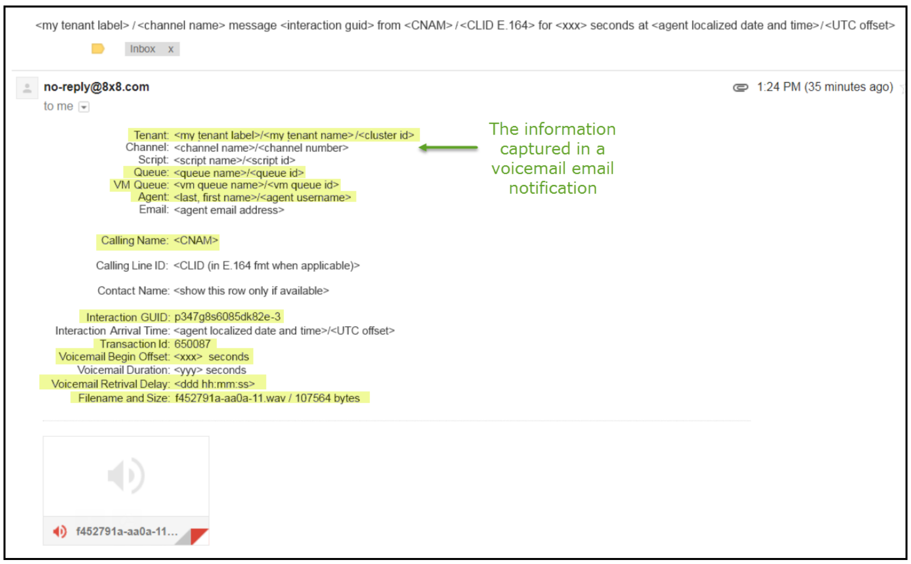
The following list includes features and enhancements introduced in the recent product releases:

- **Ability to sort pending emails by waiting time, case ID, and more**: In Agent Console, agents can now sort the pending emails by longest waiting time, case ID, contact name, company, subject, and more. All the column headers in the grid view of pending emails are now active for sorting. See how to pull emails from a queue.

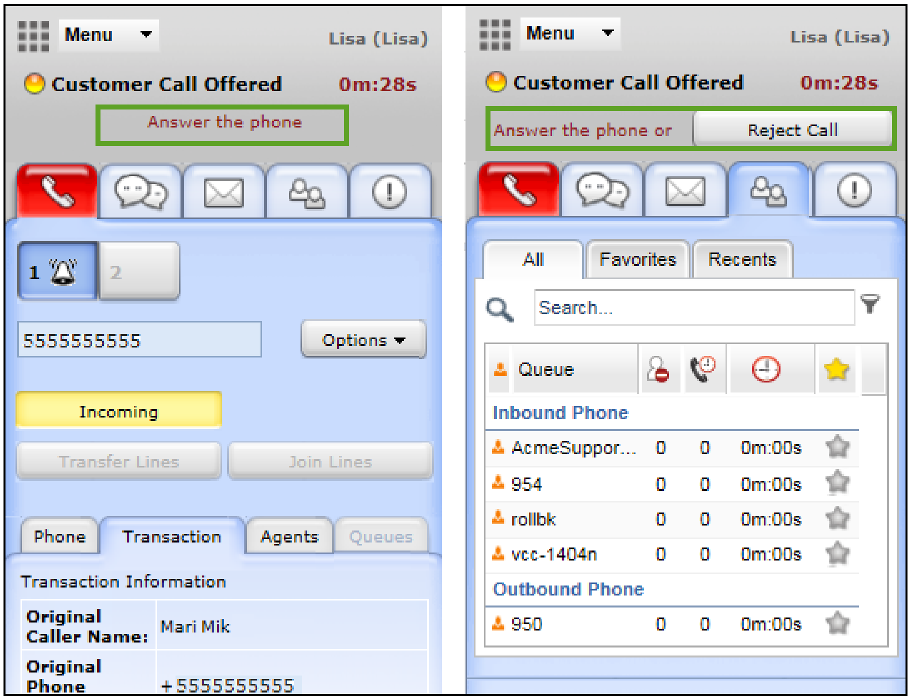


Wait Time	Case / Follow-up	Channel	Contact	Company	Subject
TRA - Compliance [41]					
78:06:02	19575	trade.orders.uk@oup.com	(last name not available), taha.bahr	N/A	RE: FUE Tender (Engineering) 2017
77:54:55	15933.2	Exporttradequeries@oup.com	(last name not available), Archeobooks	N/A	Re: order ~15933
77:47:09	16107.2	Exporttradequeries@oup.com	Koeltz, Per	N/A	AW: Book order claim ~16107
74:43:23	621.2	Exporttradequeries@oup.com	MALIN, Tom	N/A	FW: FW: EX1706146 - Kakehashi Foundation, Tokyo, Ja
72:24:55	16762.2	Exporttradequeries@oup.com	ltd, medbooks	N/A	Re: Request for Quotation ~16762
71:02:44	15274.6	Exporttradequeries@oup.com	House, Oman International Book	N/A	FW: FW: FW: Order Confirmation_0123277204_006900
70:17:26	10743.5	Exporttradequeries@oup.com	NINRAT, Vallapha	N/A	Urgent: Firm order: Monument Cambodia ~10743
70:13:29	6636.4	Exporttradequeries@oup.com	Anglesa, Pedidos Palma. Llibreria	N/A	RE: RE: order ~6636
68:50:29	17402.2	Exporttradequeries@oup.com	Dorp, Van	N/A	RE: Backorder PO MPC-CCLC 2017-2018 ~17402

- **Enhanced voicemail email notification**: If enabled by the administrator in Configuration Manager, agents can receive voicemail email notification. The voicemail email notification provides more data allowing you to track the queued voicemails better. The following information is captured in the voicemail email notification:
  Transaction ID, tenant name, cluster ID, phone queue ID, voicemail queue ID, calling name, interaction GUID of the inbound phone queue, transaction ID of the inbound phone interaction, voicemail begin offset, filename, agent name, and voicemail retrieval delay.

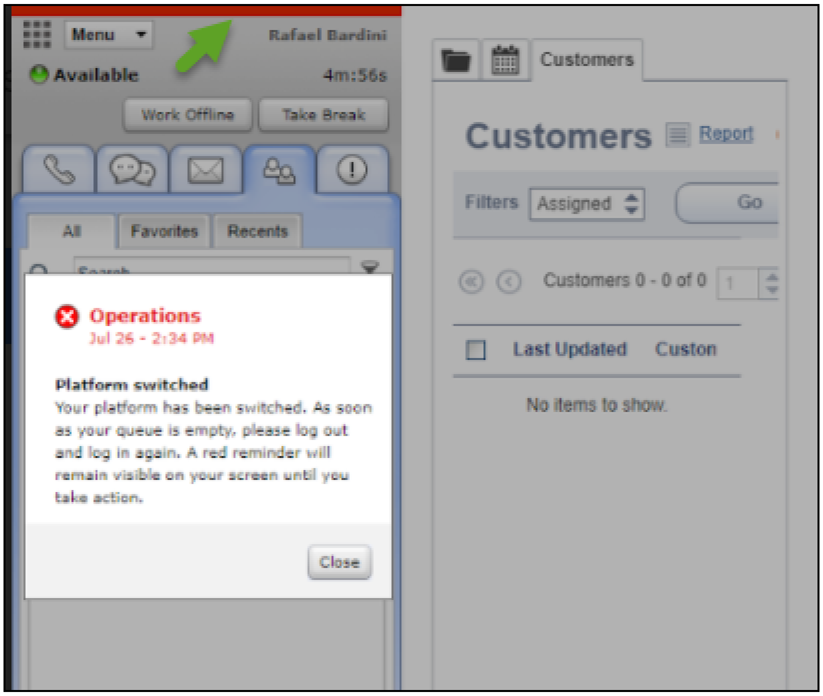


- **Ability to prevent agents from rejecting interactions**: If prevented by administrators in Configuration Manager, agents cannot reject the interactions they are offered by certain or all agent groups. The Reject button in Agent Console is disabled preventing agents from rejecting the interactions they are offered. By default, agents can reject interactions.



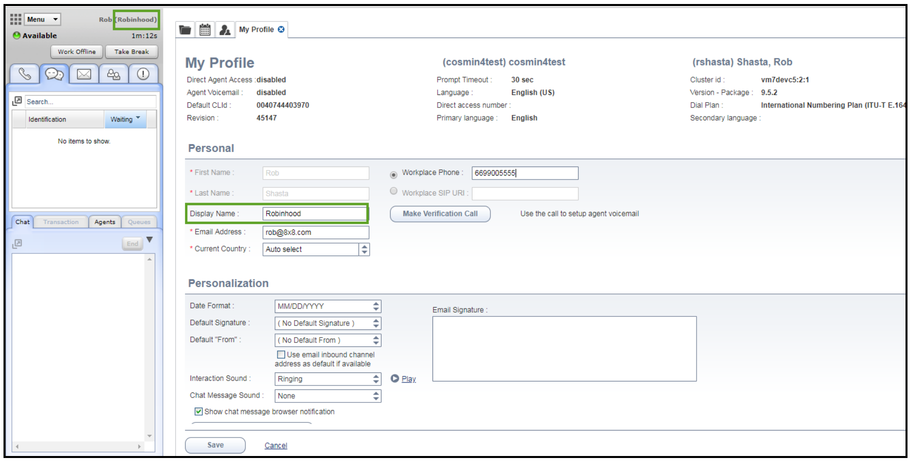
Release 9.5

- **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. See how you can View Notification Messages.



- **Ability to save agent preferences on server**: Agents can now save their preferred settings and options such as their last selected tabs in Monitoring, pop-up chat and FAQ window size, their favorites and recents tabs, etc.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.
- **Allow agents to change display name**: This new improvement allows agents to present themselves with a customized display name. The new feature ensures agent 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's Profile page. The updates in Agent Console application immediately appears in Configuration Manager

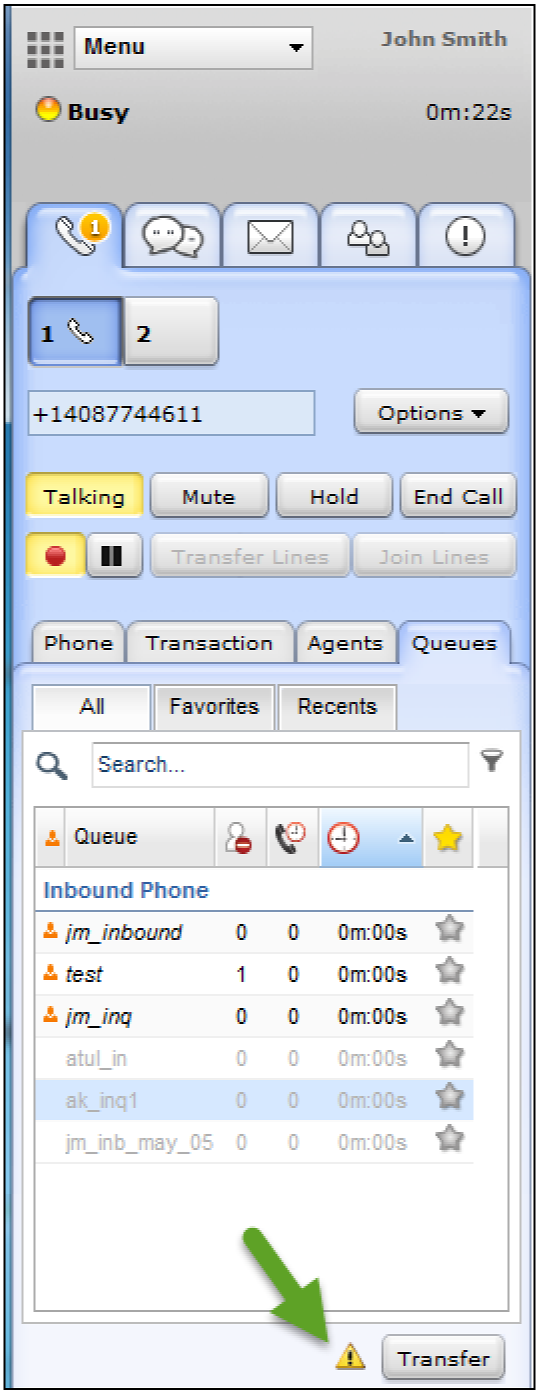
and vice versa. See Configure Your Profile to learn how to configure your profile.



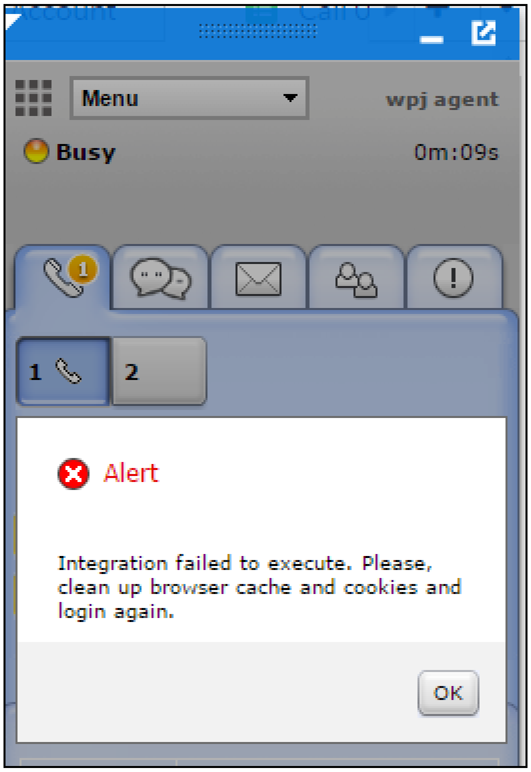
Release 9.4.3

- **Enhanced control for CRM reports**: If enabled by the administrator, agents can create or download reports. They can always run a report, however, even if the ability to download a report is disabled.
- **Increased data limit for inbound emails**: The maximum size of an inbound email routed via email channels is now increased from 10 MB to 30 MB. You can now receive an email up to 30 MB in size. This includes the size of the attachments.
- **Notification of delayed uploading of queue data**: When agents want to transfer a phone, email, and chat interaction to another queue, they may experience a delay in accessing the entire list of queues, including queues they are not part of. This may result in loading a partial list of queues, which is indicated by an exclamation symbol

next to the Transfer button.



- **Improved error messages in CRM integration**: If the screen pop fails to open when working with Virtual Contact CenterLocal CRM or External CRM, the descriptive alert message notifies agents of some troubleshooting tips.



Release 9.4

- **Ability to initiate co-browsing via Chat**
- **Improved Help interface**: Agents can now access FAQs, user guides, and support page via the Help menu. They can also submit feedback about the product using the Help menu.
- **Supported localization**: We support European French and German languages.
- **Supported Microsoft Edge browser**

Release 8.4

- **Improved login time for agents**: The time that it takes to log in to Agent Console has been greatly improved in this release.
- **Improved Chat window capacity**: Increased the chat window capacity to 5000 characters. This enhancement allows users to communicate large bodies of text, such as FAQs, via the chat window.

- **Ability to clone tasks in Local CRM**: Agents can replicate tasks quickly with a click on the task form, creating a new task.

Release 8.1

- **Multi-Chat: Ability to handle multiple chats concurrently**
- **Multilingual support for chat: Ability to handle chats in multiple languages**
- **Chat recording for supervisor: Ability to monitor agent chat conversations**
- **Enhanced control on agent Status**
- **Ability to access the list of follow-up records**
- **Displayed case ID during email interactions**
- **Enhanced awareness of queue status**
- **Ability to set up web notification alert for incoming interactions**

Get Started

Your contact center supervisor provides you with the URL, username, and password required to log in to your Agent Console account. See Log In 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.

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.

Your supervisor may also instruct you to update certain parts of your Agent Console user profile.

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.

Your supervisor may also instruct you to update certain parts of your Agent Console user profile.

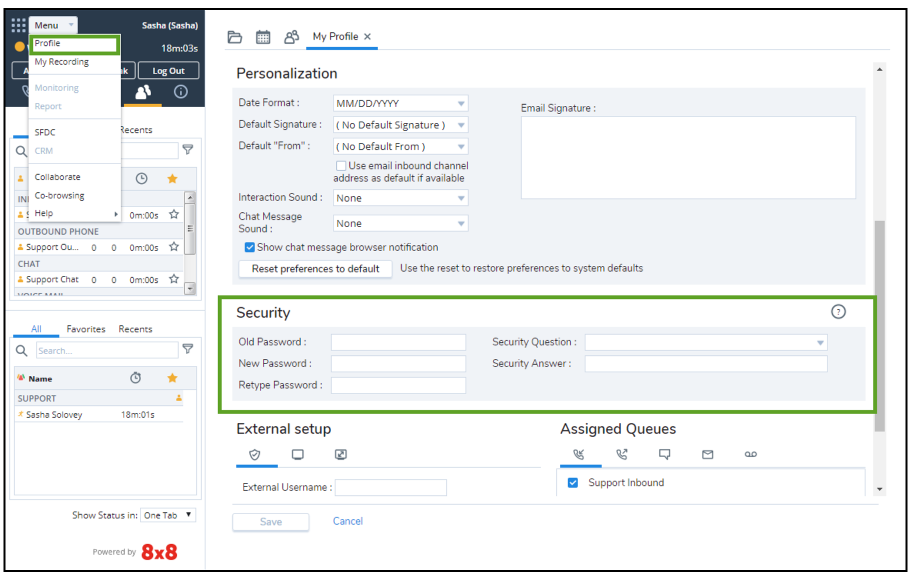
Create a New Password (Except for Unified Login and Virtual Office)

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:

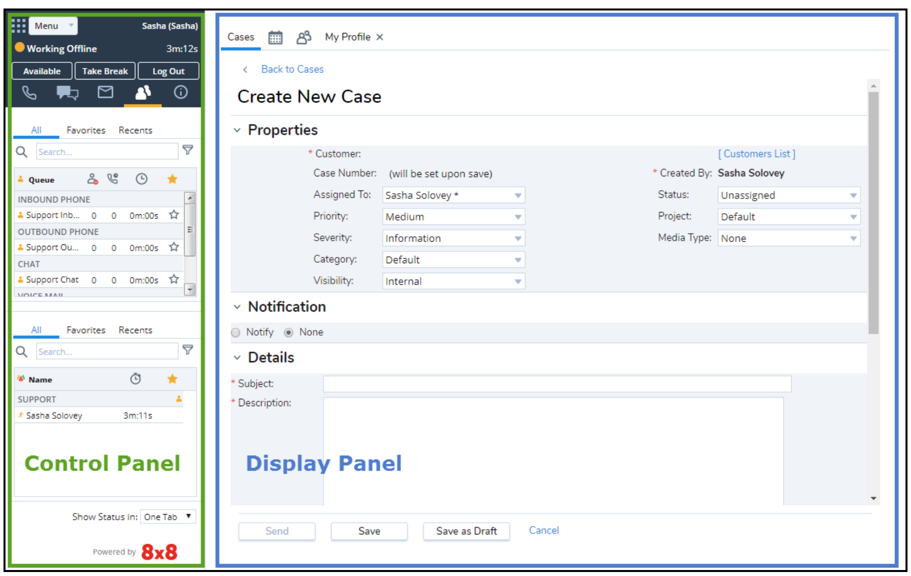
1. In Agent Console, click **Work Offline** or **Take Break**.
   You must have the **Working Offline** or **On Break** status to display the option to **Log Out**.
2. Click **Log Out**.

> **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.

Tour Your Interface

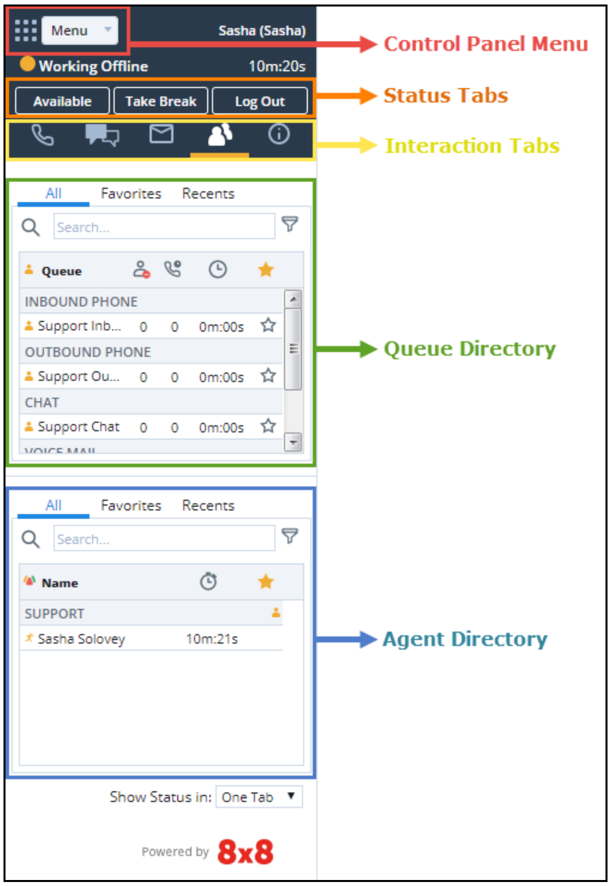
The Agent Console interface is split into:

- **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, 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

Functional Area	Description
	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. ■ **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 computer with remote desktop control options and Co-browsing capabilities. This feature is available if

<table>
<tr><th>Functional Area</th><th>Description</th></tr>
<tr><td></td><td>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.</td></tr>
<tr><td>2. Display Panel</td><td>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</td></tr>
</table>

Functional Area	Description
	each menu action. ■ **Customers**: lists your open case records by customer. ■ **Cases**: lists your open case records. ■ **Tasks**: lists the tasks assigned to you.

Offer Remote Customer Assistance

8x8 Co-browsing is available by subscription only. It allows customer support agents to assist customers remotely via a shared browser. With Co-browsing, you can empower a website or any browser-based application, and offer live, hands-on assistance to customers. Agents play a secondary role in establishing a remote session. A customer in need of assistance must initiate the remote session, generate a unique session ID, and communicate it to an agent via phone or chat. The agent then uses the ID to establish a remote session. This Co-browsing session co-exists with a call or a chat for communicating the session ID. Depending on the level of privileges granted by the administrator, the extent of remote help varies from a basic view-only mode to complete control of the customer's browser instance.

Features

- Visual, real-time web page assistance: Monitor and assist customers in real time through browser instance shared by the customer.
- Mouse tracking: As a customer, easily follow along by viewing the agent’s mouse location and movement.
- Platform details: Access information about the customer’s platform.
- Sub-domain support: Enable the Co-browsing session to continue working if the user navigates to a site that is hosted in a sub-domain, assuming that Co-browsing is also available in that new sub-domain.
- Form co-filling: Co-fill forms on websites.
- Customer privacy and security: During a Co-browsing session, if the customer is filling a form and entering sensitive information such as SSN in a form, it can be encrypted and hidden from the agent.
- Highlighting: Agents can highlight content on web pages and call out information to customers during Co-browsing. Highlight key elements on the page with drawing tools.
- Auto-fit: Agents can automatically scale the browser view to fit customer's view settings. If the customer's screen is bigger than the agent during a Co-browsing session, agents will have to scroll constantly. With the ability to auto-fit, agents can enable “Auto-fit” to automatically scale the view to fit agent's view settings or manually increment/decrement the zoom level to the desired value.

- Privilege control: You can control the extent of remote help agents can offer using Co-browsing mode. It varies from a basic view only mode to complete control of the browser instance. Take control of the customer’s screen, with their permission.

Limitations

- Co-browsing only works in HTTP secure web pages.
- Adobe Flash components, including videos, and Java applets are not supported.
- Anything that is external to the current page is not supported. This includes the file browser window that is open when selecting a file to be uploaded.
- WYSIWUG editors (AceEditor, CodeMirrorEditor, CKEditor, tinymceEditor) are not supported.
- Native tooltips are not visible between the two parties.
- Web pages with iframes and different domains are not supported.
- If the web pages open new browser window and the content has Co-browsing, this new window replaces the content in the agent side.

Supported Browsers

Co-browsing is supported on the following browsers:

- Google Chrome (latest version)
- Firefox (latest version)
- Safari (Mac only: version 7.0 and above)
- Internet Explorer 11 (Co-browsing is not supported on IE 11 in compatibility mode)
- Microsoft Edge

Co-browsing Modes

By setting up a Co-browsing mode, administrators can control the extent to which agents can assist customers remotely. Co-browsing can be enabled in one of the following modes via code snippet. If you do not provide a mode in the code snippet, full-control is the default mode:

- **full-control (default)**: In this mode, agents have full control of the customer's browser session, including synchronized navigation and the ability to highlight and co-fill a form on the web page. The agent's cursor movements and mouse clicks are in sync with the customer, and vice versa. This is the default mode. If you do not provide a mode in the code snippet, full-control is the default mode.

- **partial-control**: In this mode, agents can highlight and control the browser navigation, but do not have the privileges to fill any forms on the Co-browsed page. All HTML form elements are disabled on the agent side, alerting agents with the message "Forms cannot be edited on the agent side".
- **no-control**: This is a view-only mode. Agents can observe the customer's navigation, highlight, and offer guidance.

Notes:
- The highlighter works in all modes.
- In the full-control and partial-control modes, we cannot prevent agents from controlling form elements that are not native to the browser, such HTML drop-down.

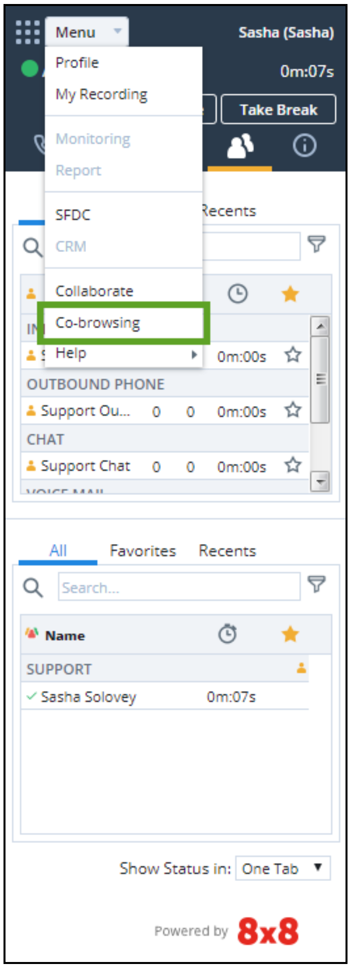
How do I help customers remotely?

Co-browsing is a secure connection that offers Virtual Contact Center agents the ability to remotely provide hands-on assistance to customers who use Configuration Manager. The agent can view the Configuration Manager session opened by the customer, co-browse, observe the mouse movements, and offer hands-on assistance if needed. The session respects the browser size set by the customer. Customers can also observe the agent's mouse movements and highlighted text.

Agents play a secondary role in establishing a remote session. A customer initiates a request for a session by generating and communicating a session code, while the agent uses the code to establish a session. For a remote session, the customer clicks **Co-browsing** on the top header bar to generate a new session ID. They then communicate the session ID to the agent.

To help a customer remotely via a Co-browsing session:

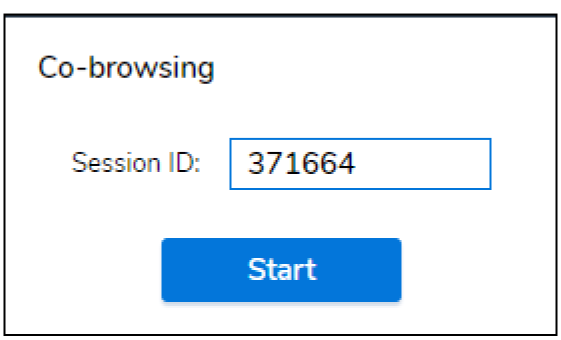
1. Log in to Agent Console as an agent.



2. Select **Co-browsing** option from the menu.

   This opens a new browser window prompting for the ID.

3. Enter the ID received from the customer to initiate Co-browsing and click **Start**.



The complete Co-browse session is established and the agent can see the customer's screen. The co-browsing window is automatically minimized as soon as the co-browsing session is established. The minimized window remains on top of the agent's screen indicating the status of the session. The agent can see the full or partial control at the top of the screen. The other party's mouse movement is visible for both parties.

4. Click **Auto-fit** on the top header bar to automatically scale the view to fit your available space.
   You can manually increment or decrement the zoom level to your desired value.
5. Toggle on **highlighting** on the top header bar.
   You can mark specific components in the page. The marks are visible for both agents and customers for a few minutes or until the agent toggles it off. It also disappears when the customer moves away from the page.

Note: During a Co-browsing session, if the customer is filling a form and entering sensitive information such as SSN, it is hidden from the agent by showing **** instead of the real letters and numbers.

6. Click **Close session** to end the co-browsing session.

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.

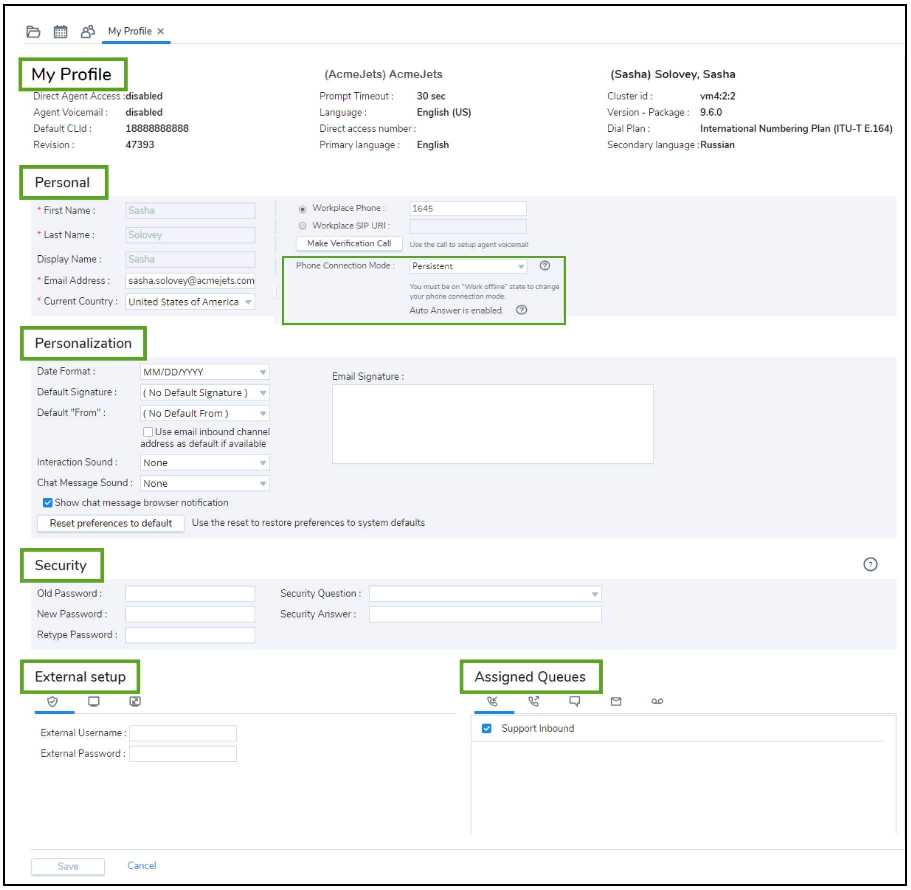
Configure Your Profile

In 8x8 Virtual Contact Center Agent Console, 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. You can also enable off-hook connection to stay connected from your device to Virtual Contact Center.
- **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.
- **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

Agent Profile	Description
	left by the customers who try to reach the agent directly. ■ **Default CLId**: Displays the default caller ID for the agent's outbound calls. ■ **Revision**: Displays the Virtual Contact Center revision number. ■ **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. ■ **Last Name**: Type the agent's last name. ■ **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 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.

Agent Profile	Description
	■ **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. **VALIDATED** next to the Workplace Phone indicates that the number is already validated. If you make any changes to the workplace setting, then **Validate** appears next to the updated field until you validate your change. ■ **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). **VALIDATED** next to the Workplace Phone indicates that the number is already validated. If you make any changes to the workplace setting, then **Validate** appears next to the updated field until you validate your change. ■ **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. ■ **Phone Connection Mode**: If Phone Connection Mode is enabled by the tenant administrator, agents can see and enable Persistent Connection Mode capability in their Profile page. Persistent Connection Mode removes the need to connect the agent's workplace phone for every call handled. Agents set up their voice connection before they start working on calls and remain connected throughout their working day. It allows them to respond to incoming and outbound phone calls with a simple click on the user interface. ■ **Auto Answer**: If enabled, every phone interaction that is offered to an agent is automatically connected eliminating the need to accept it manually. This new configurable option enhances agents efficiency by quickly connecting the calls and reducing the number of clicks an agent has to make. Auto Answer also helps prevent agents from rejecting or missing calls on their workplace phone. Agents may or may not have the permission to change their connection mode. They are notified of their new status as soon as they log in. **A** in the Phone tab indicates that Auto Answer is enabled.
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

<table>
<tr><th>Agent Profile</th><th>Description</th></tr>
<tr><td></td><td>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 case management page to send an email, the agent can choose to insert this Signature in the message.</td></tr>
<tr><td>Security</td><td>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.
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.</td></tr>
<tr><td>External Setup</td><td>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.</td></tr>
<tr><td>Assigned Queues</td><td>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.</td></tr>
</table>

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.

Format Your Telephone Number Entries

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

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[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.

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

Validate Your Workplace Setting

When changing workplace setting (Workplace Phone and Workplace SIP URI), agents must validate their changes to be able to handle the calls. When they click to validate the change, it triggers a phone call to the updated phone number. A PIN code is then communicated to the agent. The agent must enter the PIN code to validate the changes and continue. If they are unable to confirm the PIN they must exit and revert to their last validated setting. The workplace setting validation is offered as a mandatory security feature with Auto Answer, or it can be deployed as a stand-alone feature.

Features

- Is mandatory while Auto Answer is enabled.
- Offered as stand-alone feature. Admins can remove or disable this feature in Configuration Manager with no restrictions.
- Reverts to the agent's last validated setting if unable to validate the new workplace setting.

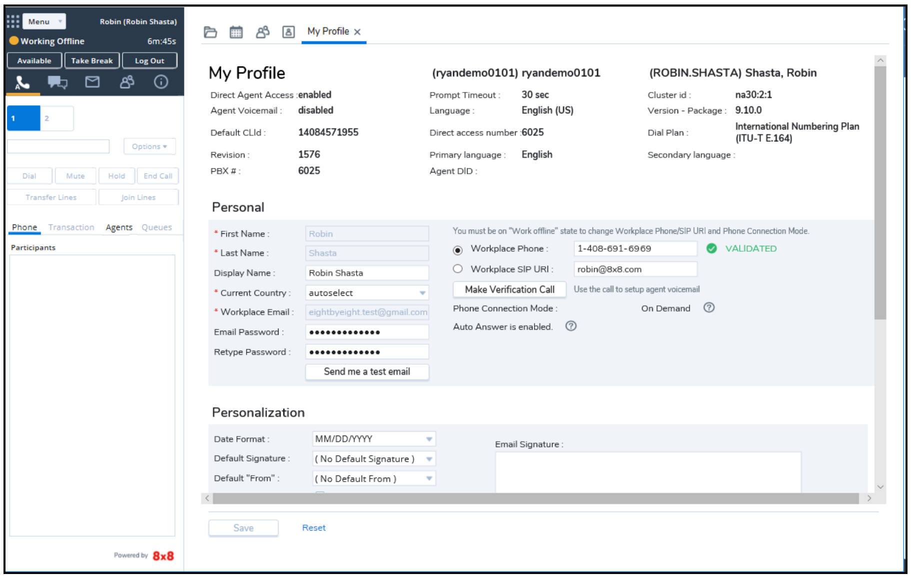
Validate Workplace Setting

To validate the workplace setting, agents require a phone and an audio access for the PIN code to be played to them. Moreover, the agents must be in Work offline status to change their workplace setting.

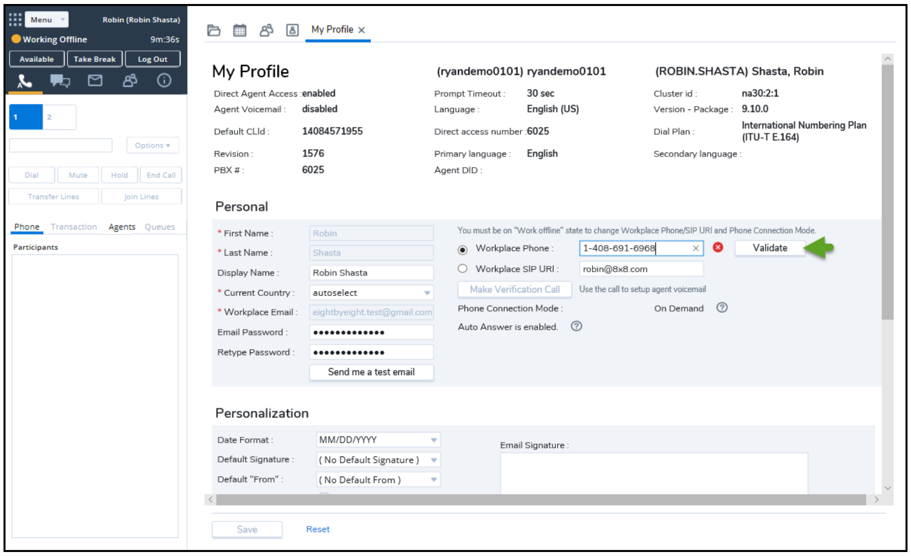
To validate your workplace setting:

1. Log in to Agent Console.
2. Change your status to **Work Offline**.
3. Go to **Menu > Profile > Personal**.

- If your workplace setting is already validated, VALIDATED appears next to the **Workplace Phone** or **Workplace SIP URI** fields.



- If you make any changes to the workplace setting, then **Validate** appears next to the updated field until you validate your change.



4. To save the changes in the workplace setting, click **Validate**.

Note:

- Empty fields and invalid formats such as 1-408-555-000e, do not show the **Validate** button.

- The **Make Verification Call** button is disabled until the workplace setting is validated.

Note:

- If you make other changes in the agent profile such as changing your current country or signature, the **Save** button in agent profile is enabled until you save those changes.

- If you **Save** agent profile before validating the new workplace setting, only the changes to the workplace setting is lost and it goes back to the last validated setting.

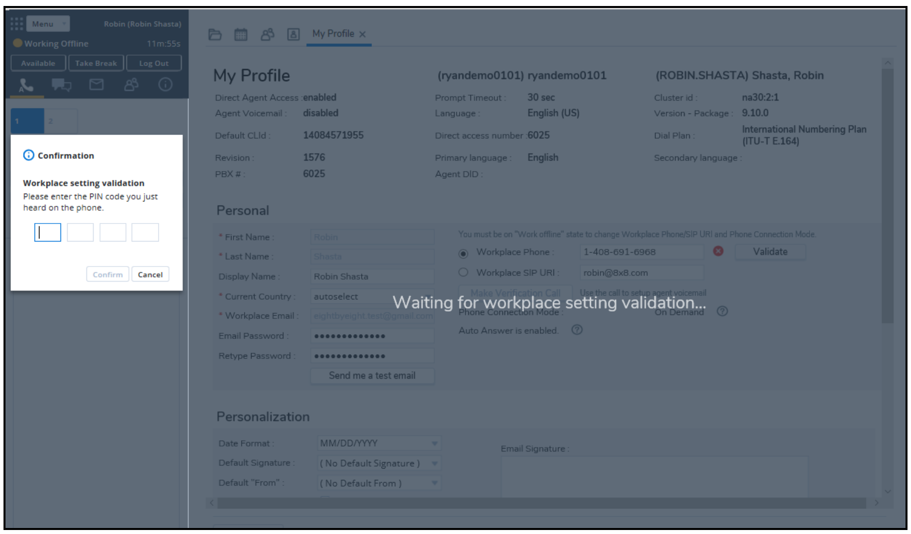
- If you close agent profile before validating the new workplace setting, a message appears to either **Validate New Setting**, or **Close** and keep the last setting.

- If you change the agent status before validating the new workplace setting, a message appears to

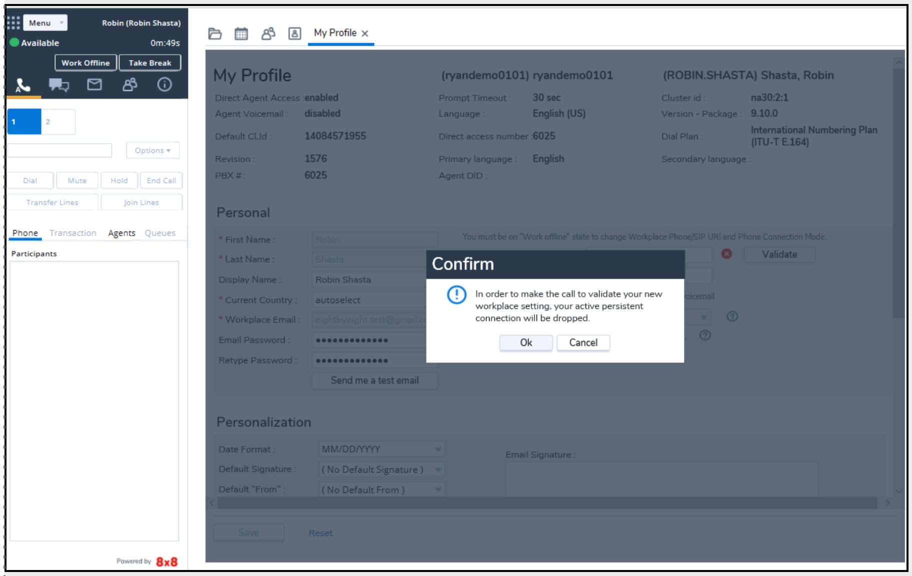
either **Validate New Setting**, or ignore your changes and **Keep Last Setting**.
- If you **Reset** the agent profile before validating the new workplace setting, a message appears to **Validate New Setting**, or **Reset** and revert to the last validated setting.

5. The agent receives a verification call for the new setting. Answer the call. A four-digit PIN is played to the agent. The PIN code is numeric only and is repeated in the call.

6. Enter the PIN in the confirmation window and click **Confirm**. The new change is now **VALIDATED** and auto saved.



Note: When a Persistent Connection Mode is open, changes to the workplace setting drops the connection mode. The validation call is placed to the new setting and a four-digit PIN is played to the agent. Validation calls are not auto answered.



7. If you enter a wrong PIN code and click Confirm, validation fails and **Validate** still remains in the agent profile. A failure message is displayed in agent profile. Repeat the process from the Profile page until the message in the call verifies the successful validation.
8. Once Validated, change your status to **Available** and continue.

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 access email options, log in to the Agent Console and go to **Menu > Profile**:

- **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.
- **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.

For details, see Configure Your Profile.

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

Enable Persistent Connection Mode

The Persistent Connection Mode was previously known as off-hook connection mode. There is no change to the functionality, but just the terminology. By selecting the Phone Connection Mode, agents can set up their voice connection before they start working on calls and remain connected throughout their working day. Agents can respond to incoming and outbound phone calls with a simple click on the user interface improving their call handling efficiency. If the administrator allows agents to change their Phone Connection Mode, agents can choose one of the following modes from Agent Console profile:

- **On Demand**: On Demand Connection Mode creates a temporary connection from the agent’s workplace phone to the system. The agents have to manually accept the call in their soft or hard phone.
- **Persistent**: Previously referred to as off-Hook Connection Mode, Persistent Connection Mode creates a constant connection from the agent’s workplace phone to the system. Once the connection is open, it will stay active until logged out. Any changes to the setting will remain in effect for the whole duration of the agent’s Persistent Connection Mode. Agents set up their voice connection before they start working on calls and remain connected throughout their working day. It allows them to respond to incoming and outbound phone calls with a simple click on the user interface, improving their call handling efficiency.

Note: There is no audio prompt or audio indication for Persistent Connection Mode.

Features

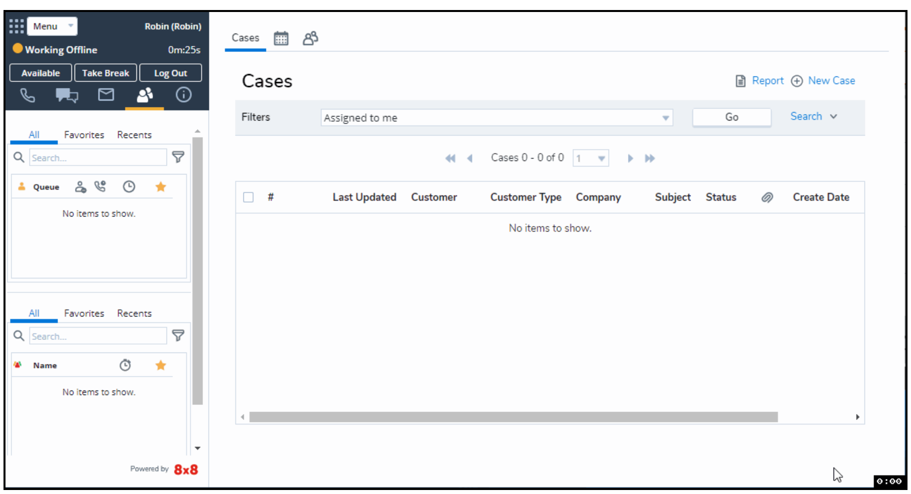
- Agents can immediately and seamlessly connect to customers.
- Offers a Persistent Connection Mode from the agent's device to VCC that is ready for outbound dialing.
- Removes the need to connect the agent's workplace phone for every call handled.
- Increases productivity from a higher throughput of calls.

Enable Persistent Connection Mode in Agent Profile

If this feature is enabled by the tenant administrator, agents can use Persistent Connection Mode to respond to incoming and outbound phone calls.

To enable Persistent Connection Mode for an agent session:

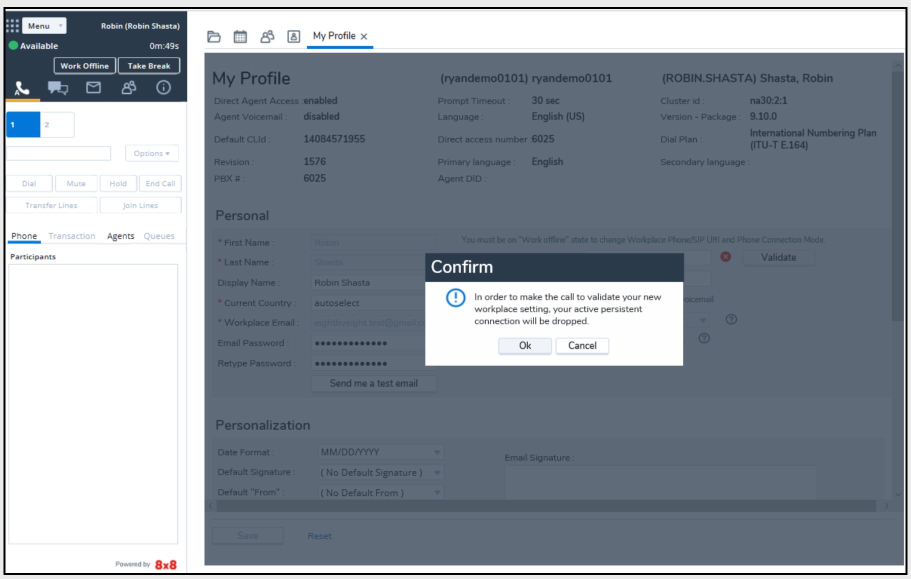
1. Log in to Agent Console. Your status is set to **On break**.
2. Change your status to **Available**.
   It triggers the outbound call from Virtual Contact Center to agent's Workplace Phone or Workplace SIP URI to open the Persistent Connection Mode.
3. Answer the phone call to receive a four-digit PIN code to authenticate the Persistent Connection Mode. This PIN is valid only for that session



Note: Every time agents log in and make themselves available, they receive a new PIN for authentication.

4. At the prompt, enter the PIN and click **Confirm**. It may take a few seconds.
   You are now connected to Persistent Connection Mode. A message appears on top indicating that Persistent Connection Mode is open.

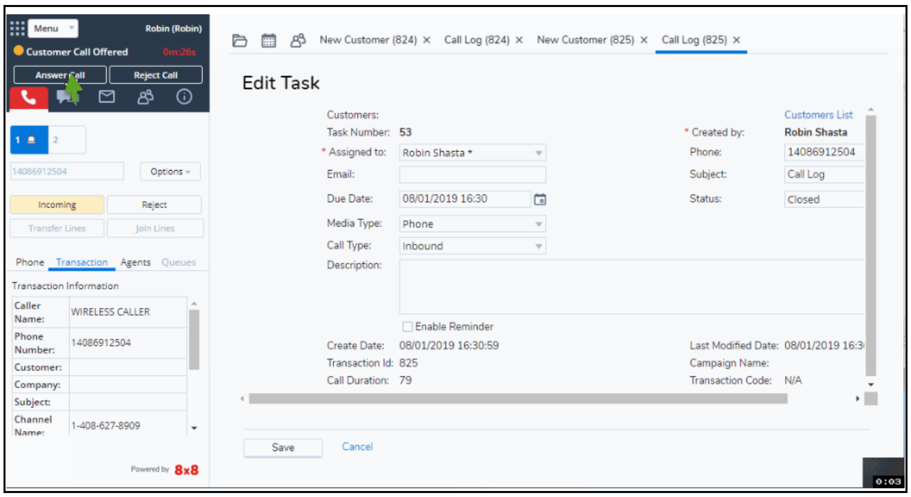
Note: When a Persistent Connection Mode is open, changes to the workplace setting drops the connection mode. The validation call is placed to the new setting and a four-digit PIN is played to the agent. Validation calls are not auto answered.



5. If you miss the call, click **Re-open connection**. It triggers the outbound call from Virtual Contact Center to agent's Workplace Phone or Workplace SIP URI to open Persistent Connection Mode.
6. If you click to change the Phone Connection Mode to **On Demand**, a confirmation message notifies the agent of the setting change.
7. Click **Ok**.
8. Click to **Save** the profile settings.

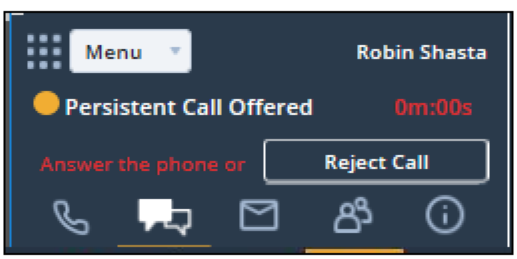
Work with Persistent Connection Mode

If permitted by the administrator, agents can opt the connection mode in their profile. Once the Persistent Connection Mode is established and you receive an inbound call, the phone tab blinks red. Click **Answer Call** in the Control Panel and get connected right away without shifting focus to your desk phone or soft phone.



To work with Persistent Connection Mode:

1. Log in to Agent Console. Make sure Persistent Connection Mode is enabled in the agent profile.
2. Click to change your status to **Available**.
   It triggers the outbound call from Virtual Contact Center to agent's Workplace Phone or Workplace SIP URI.
3. The agent status changes to **Persistent Call Offered** at this time.



4. Accept the offered calls to instantly connect to the inbound call, or hear Virtual Contact Center ringing the customer for the outbound calls.
5. If you click **Work Offline** or **Take Break**, the Persistent Connection Mode will remain connected as long as you do not hang up the agent's phone.

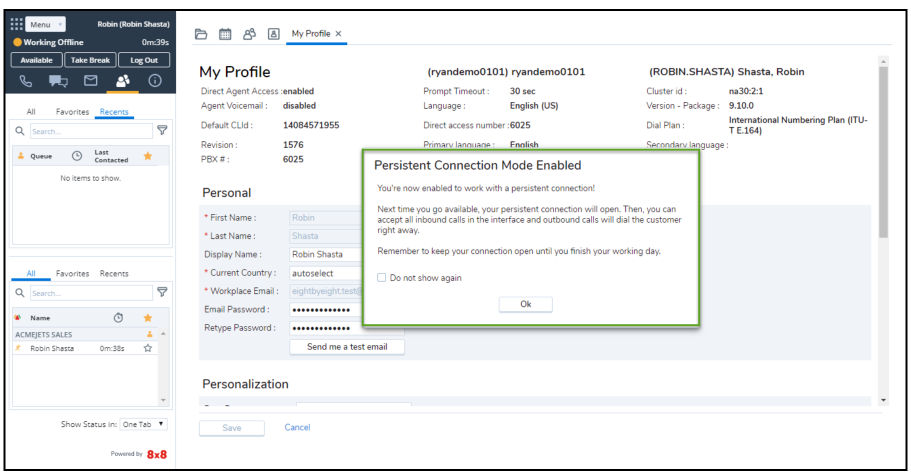
6. If you **Log Out** or hang up the agent's phone, you lose your connection. A notification appears allowing the agent to open the Persistent Connection Mode again.
7. Click **Re-open connection** to continue.

Change your Phone Connection Mode

Persistent Connection Mode must be enabled by your tenant administrator. Once enabled, agents can see their connection mode in Agent Console under **My Profile > Phone Connection Mode**.

To change your Phone Connection Mode in Agent Console:

1. Log in to Agent Console.
2. Go to **My Profile > Phone Connection Mode**.
3. Click to **Work offline**.
4. Click to change the **Phone Connection Mode**. Agents must have the change permission granted to them by tenant administrator.
5. Click **Save**. A dialog box notifies you of the status change.



6. Click **Ok**.
7. Click to change your status to **Available**. You receive a phone call.
8. Answer the phone call to receive a four-digit PIN code to authenticate the Persistent Connection Mode. This PIN is valid only for that session or while the phone is connected. There is no audio prompt or audio indication for Persistent Connection Mode.
9. If you are disconnected, click **Re-open connection** to continue.

Combinations for Phone Connection Mode and Auto Answer Settings

Auto Answer can be combined with Persistent Connection Mode to create an on/off combination of the two features. Auto Answer settings combined with Persistent Connection Mode can be configured at multiple levels depending on the features availability:

Connection	Behavior
Persistent Off, Auto Answer Off	Phone Connection Mode is On Demand and Auto Answer is off, so the agent needs to answer the phone for every phone interaction.
Persistent Off, Auto Answer On	Phone Connection Mode is On Demand and Auto Answer is on, so the agent phone automatically connects, and the interaction is auto answered when offered.
Persistent On, Auto Answer Off	Phone Connection Mode is Persistent, so the agent media path is always connected but for every phone interaction the agent needs to click the Accept button.
Persistent On, Auto Answer On	Phone Connection Mode is Persistent, so the agent media path is always connected, and the interaction is auto answered when offered.

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.

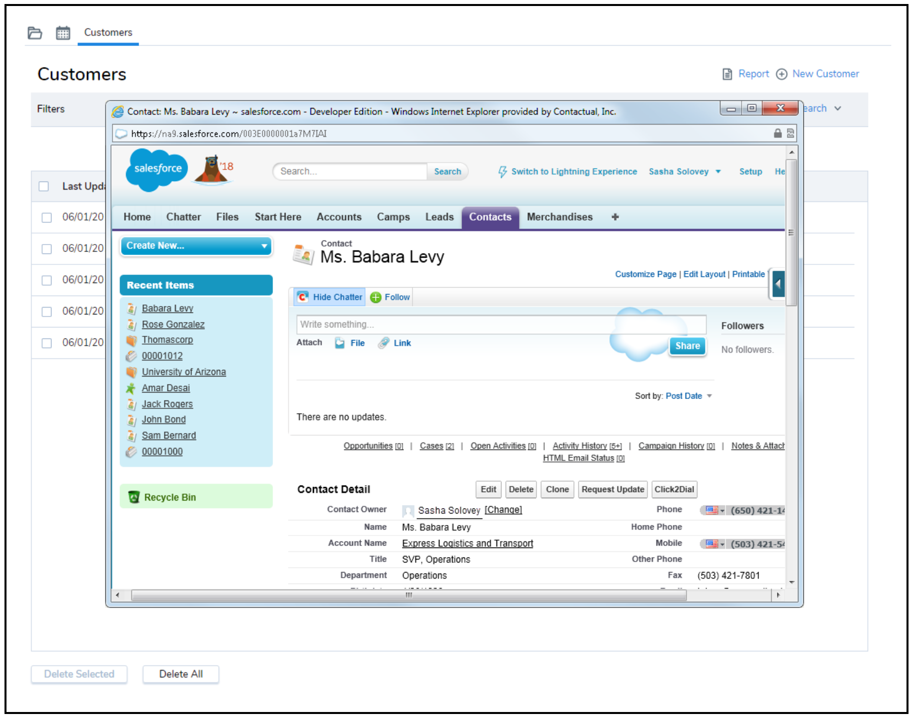
   > **Note:** The agent's ability to define screen pop window properties is available only for Salesforce, Zendesk, and Microsoft Dynamics integration.

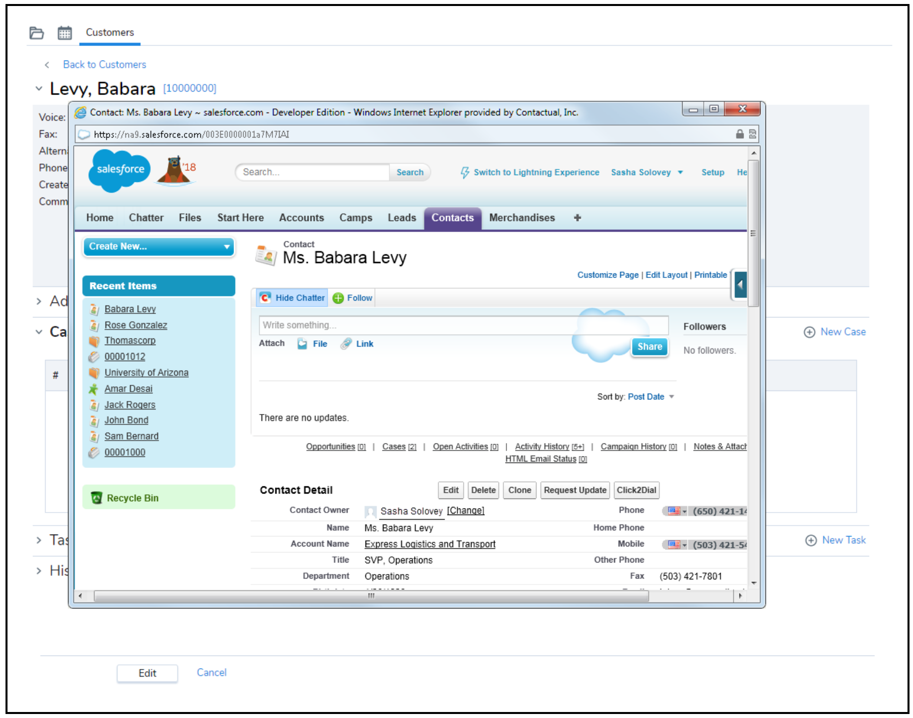
7. Click **Save**.
   Your settings help launch your External CRM from Agent Console.
   Your supervisor provides you with the information you need to access and work with your contact center's External CRM product.

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.

<table>
<tr><th>Functional Area</th><th>Description</th></tr>
<tr><td></td><td>
</td></tr>
<tr><td>Window Properties Tab

Note: This tab is enabled only if the tenant administrator grants access.</td><td>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.</td></tr>
</table>

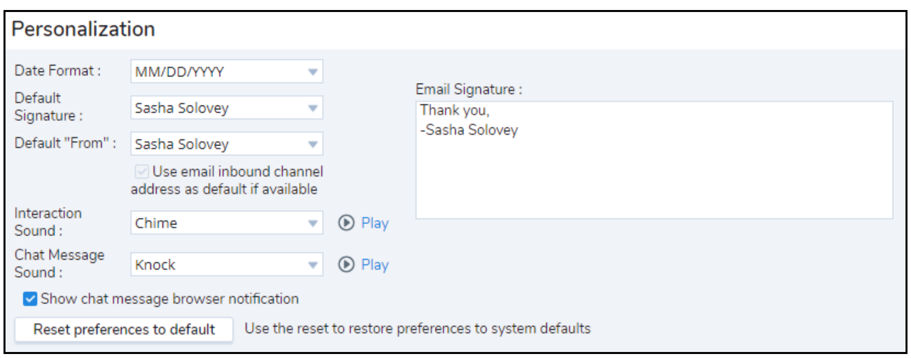
Personalize Your Console

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.

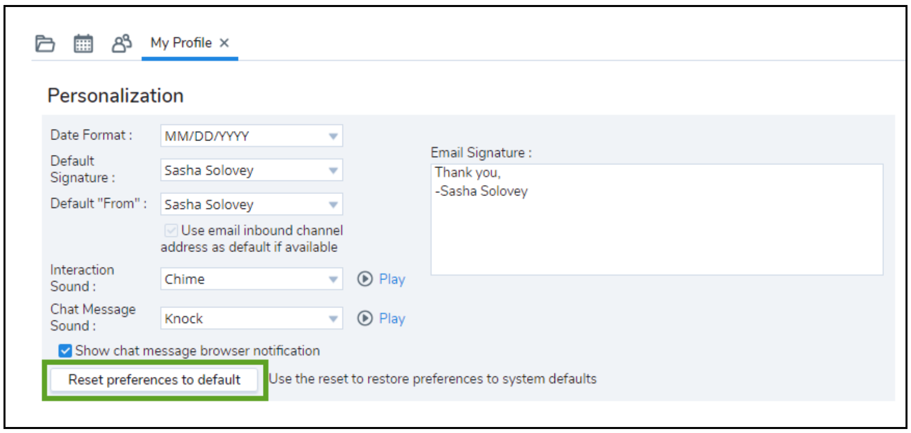
The following user preferences are saved on the server:

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

To view your assigned queues:

1. Log in to Agent Console.
2. Go to **My Profile > Assigned Queues**.

3. Select the desired media tab such as Inbound, Chat, or Email.
4. Check if the check boxes are selected next to your assigned queues.

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	Click **Work Offline** button in the Control Panel.	No	▪ Available ▪ Take Break

Agent Status	Description	Where to access?	Receive new interactions	Available statuses
	the features are enabled and accessible.			■ Log Out
Busy (Stop New)	The agent has accepted a chat and 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.	Click **Stop new** offered during Busy status. This button is only visible when the agent is handling a chat interaction. To receive more chats, click **Resume**.	No	No other status is available 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

Check Queue and Agent Status

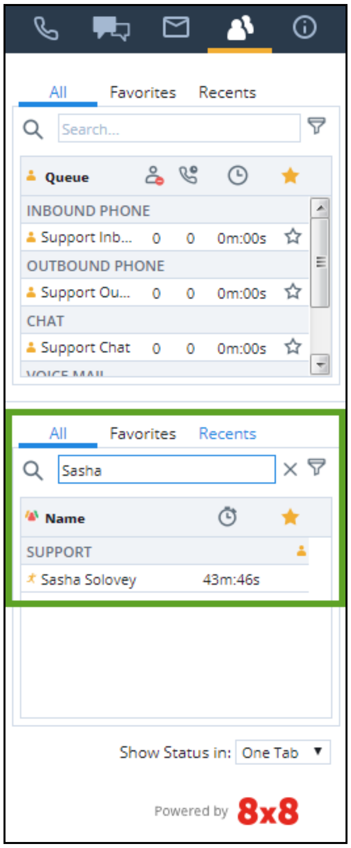
The Status tab in the Control Panel provides real-time information about queues and agents. It shows the number of interactions waiting to be served in a queue, the longest waiting interaction in a queue, the number of eligible agents in busy state, and the status of agents. Supervisors can check the status of queues and agents they supervise, and communicate with agents instantly via chat or call.

The Status tab organizes the status of queues and agents in separate tabs:

- **Queues Status**: View the status of queues you are a member of.
- **Agents Status**: View the status of other agents belonging to your group.

Ability to Search

Search and retrieve status about a specific queue or an agent instantly. The search is not case-sensitive.



Ability to Filter Queues and Agents

Filter queue status information by queue relationship, member status, and media type.

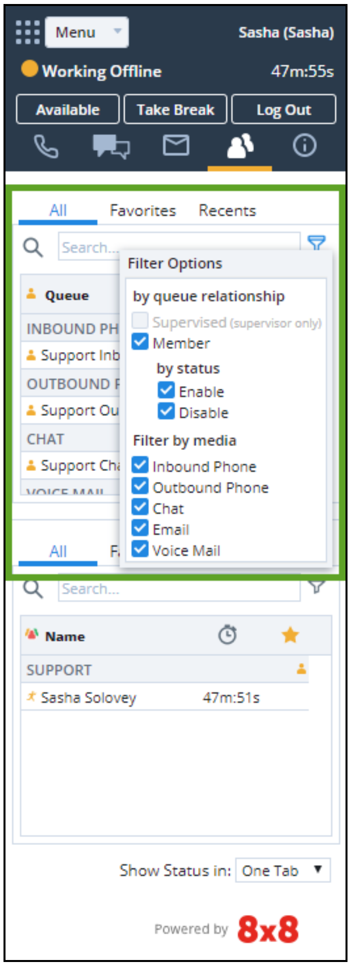
Filter queues by:

- **Queue Relationship**: Supervised by you, or queues you are a member of.

  If you are a member you can filter by status:

  - **Enable**: You are a member of, and enabled to serve.
  - **Disable**: You are a member of, but disabled from serving.

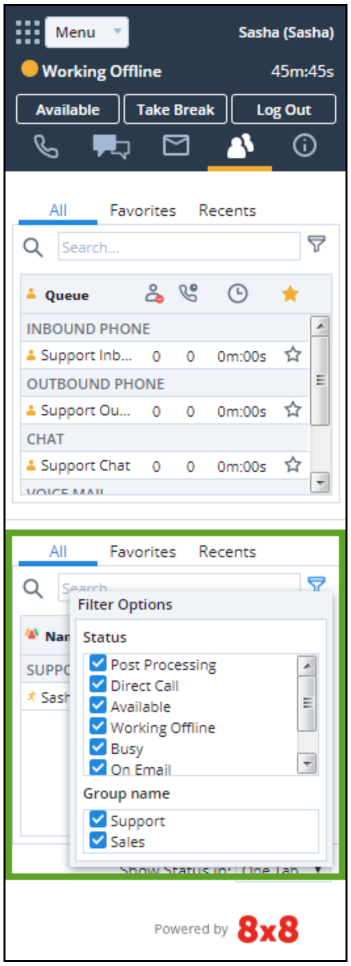
- **Media**: media type such as: Inbound Phone, Outbound Phone, Chat, Email, and Voicemail queues.



> **Note:** If you are disabled from serving a queue, you can still view the status of that queue, but the queue appears gray in the directory.

Filter agents by:

- **Status**: you can select one or more statuses such as Available, Busy, Post Processing, Logged Out, etc.
- **Group Name**: You can select one or more groups that an agent is affiliated with.

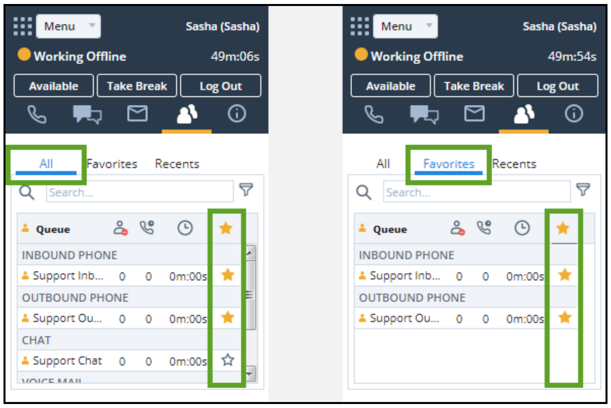


Note: The status shown in the Directory tab in Agent Console is retrieved from Virtual Office and not from Agent Console.

Defining Favorites

Bookmark agents you contact often and queues used often, and track their status every time you log in with just a click on the Favorites tab.

For example, you are one of five managers in the AcmeJets Support agent group. You manage seven team members out of the 50 members belonging to the group. You can mark these seven team members as your favorites and monitor their status with just a click, rather than sifting through the status of the whole team.



Tracking Recents

Using the **Recents** tab:

- Track those agents with who you initiated a call or a chat session in the past. The Recents tab lists those agents and displays their status. Your search results are stored locally.

  Note: The Recents tab does not include participation in a chat or a call.

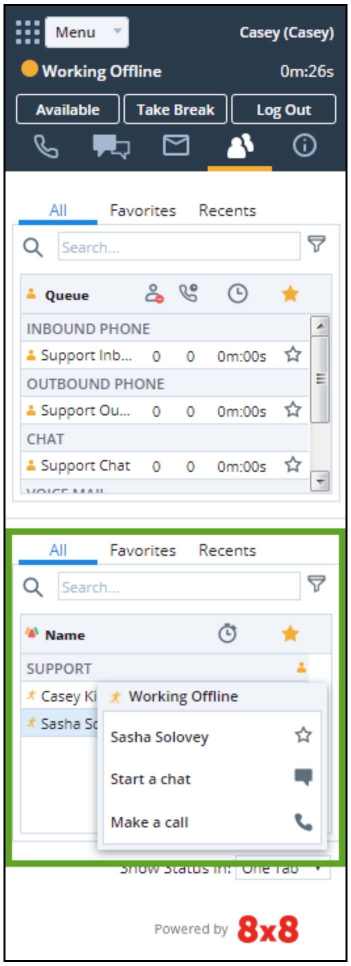
- Track the status of queues you transferred the calls to in the past.

Click to Chat or Call an Agent From the Status Tab

With just a single click, you can call or chat with an agent from the Status tab. In the Status tab for agents, right-click an agent in the panel for a context-sensitive pop-up menu with options to:

- **Start a Chat**: Initiate a chat with the agent.
- **Make a Call**: Place a call to the agent.

- **Monitor**: Monitor agent activity (supervisor-only privilege).



Work with Codes

Your contact center administrator may set up different types of code lists serving a unique purpose. The codes are presented during an interaction if you are assigned to them. You may have to select one or more custom codes as your status changes or as you process interactions.

Such code lists include:

- **Status Codes**: Indicate the reason for your status change, such as choose attending a meeting as the reason you work offline.
- **Outbound Phone Codes**: Track the purpose of a call, or indicate the calling line ID of your outbound calls.
- **Transaction Codes**: Indicate the purpose of interactions, and record the outcome of each interaction.

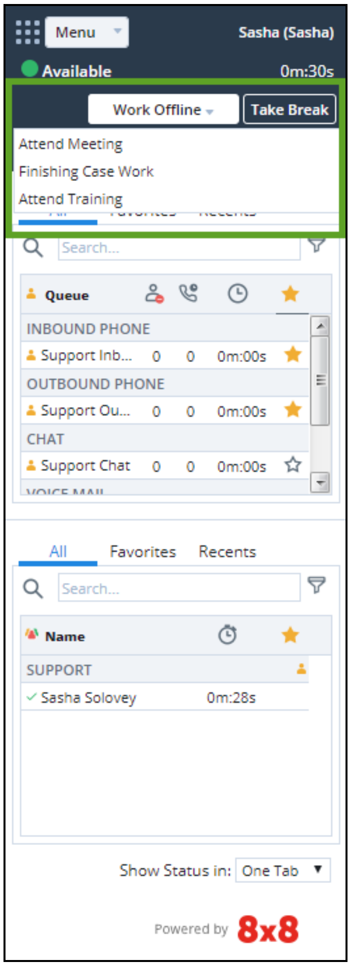
Your supervisor provides you with a list of your company's custom codes and explains when to choose a particular code.

Select Status Codes

If your Virtual Contact Center includes the optional agent status codes feature, your contact center administrator has created status codes that identify reasons for a status change. When you select a status change button, the codes show up prompting you to select one.

For example, if you choose to change your status by clicking Working Offline, Agent Console displays a list of reasons for working offline. Depending on your contact center's code definitions, the reasons may be: attend meeting, attend training, or finishing case work. You must choose a Status Code before you can complete the status-change operation.

The procedure in this section assumes your Agent Console includes the optional Status Codes feature.



To choose a status code:

1. In the Control Panel, click a Status button such as Work Offline.
   For general statuses, see Set Your Status.
   Agent Console displays a list of status codes for the selected status.
2. Select a code from the list. Your status changes to the desired state.
   Agent Console applies the status. The status and associated status code appear in the contact center's historical reports.

Select Outbound Phone Codes

Outbound Phone Codes are used for tracking the purpose of a call, or for setting a custom Calling Line ID before dialing out. For example, if your Contact Center provides services to multiple companies on the same tenant but on different channels, you must ensure the correct caller ID is applied to each company so that the customers have the best callback experience. Your contact center administrator may define outbound phone codes to assign caller ID to outbound calls from your tenant. If you are assigned to an outbound phone code list, you are presented with the list when you dial out. You have to select a code to apply the right calling line ID.

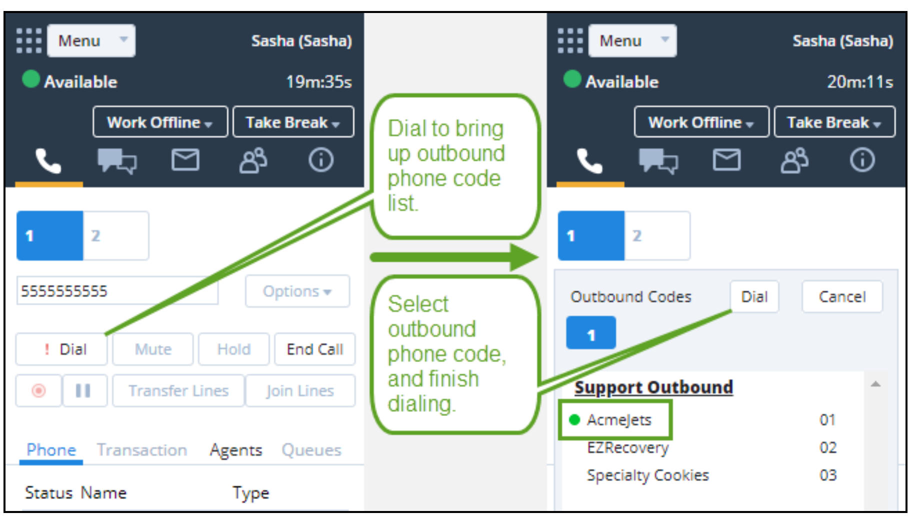
Note: Assigning calling line ID is not supported by all telecommunication carriers.

Using the Outbound Codes functionality, an agent assigns a calling line ID to an outbound phone call from the predefined list before initiating the call.

Virtual Contact Center allows you to assign tenant channel numbers, special request numbers, or anonymous calling line ID to outbound calls by selecting an appropriate code.

To select Outbound Phone Codes:

1. In the **Phone** tab, enter a telephone number, and click **Dial**.
   The outbound phone codes are presented.



2. Select a code from the list, and click **Dial**.
   The calling line ID associated with the code applies to the call and the call dials out.

Use Keyboard Shortcuts

In a contact center environment, the time taken by agents to process calls is critically important. During a call, agents may be required to browse multiple code lists and select the desired code(s) for each call. This process is time-consuming. The keyboard shortcuts for codes minimize the time spent selecting the codes by reducing the number of clicks in the call flow. This feature is useful when the agent knows the code selection and does not have to go through the lists to make choices.

The keyboard shortcut for Outbound Phone Codes is ***F2 d nn*** (sequentially, where ***d*** is outbound phone code, and ***nn*** is code number). Within each code list, each code is numbered from 01 onwards. To select a second code in the list, press ***F2 d 02***.

Note: The keyboard shortcut works with one set of Outbound Phone Codes only. It does not support more than one set of codes.

To select an Outbound Phone Code using a keyboard shortcut:

1. In the Phone tab, enter a telephone number, and click **Dial**.
2. Type ***F2 d*** to bring up the Outbound Phone Code list, and then type the desired code number or select the desired code.
   OR
   Type ***F2 d nn*** to select the desired outbound phone code from the code list, where ***nn*** is the code number.
   The desired code is selected and the call dials out.

Note: While selecting a code using the shortcut, always choose lowercase ***d*** or ***t***. Enter the number as 01, not 1.

The following table gives examples of acceptable and unacceptable keyboard shortcut keys:

Outbound Phone Codes Keyboard Shortcut	Acceptable Format
F2 d 01	Yes
F2 D 01	No
F2 d 1	No

Select Transaction Codes

Transaction codes are mainly used to state the purpose of interactions, and to indicate the outcome of inbound and outbound interactions.

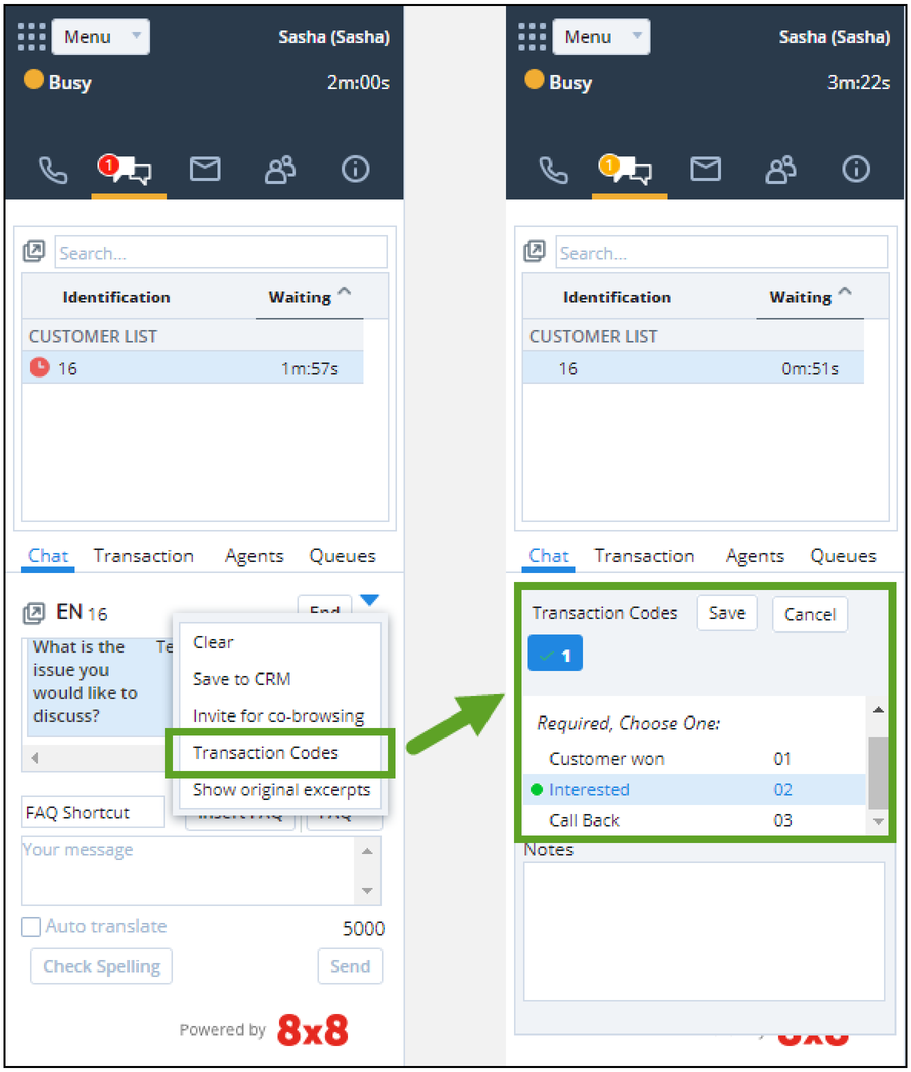
For example, an ACME Sales representative processing a sales campaign for a new product, places outbound calls to prospect customers. He can record the result of each interaction with predefined transaction codes, such as: Successful Sale, Prospect Interested - Call back, Prospect not Interested - Do not call back, Reached Voicemail, Faulty Number, and more. Further in the sales process, you can define transaction codes to identify various stages of the sales process, and apply the codes to convey the status and result of each interaction.

If your Virtual Contact Center includes the optional transaction codes feature, your contact center administrator creates transactions codes that identify call disposition.

Note: With Auto-TCL, AMD, and CCB services, the system creates automatic transaction codes during an interaction and deposits them under **Cases > Transaction Codes**and **Tasks > Transaction Codes**.

Optional vs. Required

Codes can be configured to be optional or required. If your contact center administrator configures a code list as mandatory, as you process interactions, you are required to select transaction codes. You can end processing a call only after selecting the desired codes.

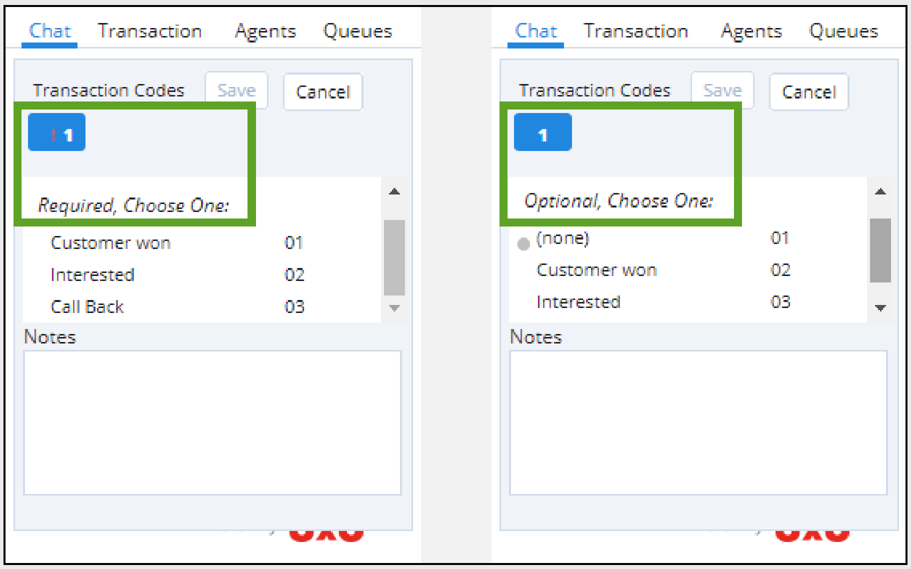


If your administrator configures a code list as optional, as you process interactions, you have the flexibility to skip codes selection.

To select transaction codes during a call:

1. During an active call, go to **Options > Transaction Codes**.

Note: The Options button or the Transaction Codes button indicates when the code list is mandatory.



The code list assigned to the queue or the agent group appears.

2. Select the desired code(s) and click **Continue**. The code is assigned to the call.

Note: If you end the call without selecting a mandatory code, the call stagnates in the post processing mode. Clicking **End Post Processing** brings up the code list, forcing a selection.

Agent Console applies the code and allows you to begin processing the new interaction. The transaction code gets logged in the contact center's historical reports.

Use Keyboard Shortcuts

In a contact center environment, the time taken by agents to process calls is critically important. During a call, agents may be required to browse multiple code lists and select the desired code(s) for each call. This process is time-consuming. The keyboard shortcuts for codes minimize the time spent selecting the codes by reducing the number of clicks in the call flow. This feature is useful when the agent knows the code selection and does not have to go through the lists to make choices.

The keyboard shortcut for Transaction Codes is ***F2 t nn*** (sequentially, where ***t*** is the transaction code, and ***nn*** is the code number). Within each code list, each code is numbered from 01 onwards. To select a second code in the list, press ***F2 t 02***.

Note: The keyboard shortcut works with one set of transaction codes only. It does not support more than one set of codes.

To select a transaction code using a keyboard shortcut:

- During an interaction, type ***F2*** and then ***t***, sequentially, to bring up the Transaction Code list, and then select the desired code.
  OR
- Type ***F2 t nn*** to select a desired transaction code where ***nn*** stands for the transaction code number in the list. The code is automatically saved.

Note: While selecting a code using the shortcut, always choose lowercase ***d*** or ***t***. Enter the number as 01, not 1.

The following table gives examples of acceptable and unacceptable keyboard shortcut keys:

Transaction Codes Keyboard Shortcut	Acceptable Format
F2 t 01	Yes
F2 T 01	No
F2 t 1	No

Manage Your Voice Pre-Recording

Agent Console allows you to record up to ten voice recordings and play them during an inbound or outbound call. When you place an outbound call and reach voicemail, you can choose to play your pre-recorded message, such as a campaign message, and hang up. The application plays the voice recording and terminates the call. If you have direct agent access, you can record a personal voicemail greeting to be played to callers.

Note: To record a message from your phone, your phone must be entered in your profile.

To record a message:

1. From the Control Panel, select **Menu > My Recording**. Agent Console displays the **Voice Pre-Recordings** panel.
2. Click **New Recording**.
3. Enter the following information:
   - **Name**: to identify the voice message in the Name entry area.
   - **Description**: to state the purpose of the message in the Description entry area.
   - **Text**: to write the script of the message.
4. Select **Enabled** to play this message during a call.
5. Click **Record a Message**.
   A dialog box appears indicating the following steps to record a voice message:

a. Click **Call Your Phone**. Your phone rings. When you answer the call, you are prompted to record your message after the beep.

b. Click **Record** and say your message.

c. Click **Stop Recording** to end the recording. The recorded message is played to you. If you are not satisfied with the recording, you can re-record the message by clicking **Record** or by pressing 1 on your phone key pad.

d. Hang up the phone and click **Close** to close the pop-up dialog box.

6. Click **Save**.

   A list of voice recordings appears.

Note: You can play your message and record it again by clicking **Re-record a Message** in the edit mode.

Overview of Processing Interactions

All interactions flowing into the Virtual Contact Center are channeled through queues. The queues in turn direct them to agents based on the skill level and availability. An agent has to be a member of a queue to receive any interaction from the queue.

Your contact center supervisor assigns you to one or more queues supported by Virtual Contact Center:

- Phone
- Voicemail
- Chat
- Email

Each type of queue corresponds to a type of Agent Console interaction. Interactions are the customer requests for information or assistance. You can use your Agent Console to process the interactions. The Control Panel in Agent Console features a separate interaction tab for each media type. The Status tab provides real-time status on agents and queues.

Note: The Reject interaction button is disabled if your contact center administrator has not granted the permission. This prevents agents from rejecting the interactions they are offered.

Notification Alerts

In Agent Console, agents can receive sound and web notification alerts for incoming interactions and avoid missing interactions when the application is not in focus.

- **Sound notification alert**: An audio alert for incoming interactions. You hear this audio alert when an interaction is offered to you. You can play to check the notification sound. See Personalize Your Console for details.
- **Web notification alert**: While in the Available state, if you have moved away from the application temporarily, the web notification alerts you of incoming interactions. Click a notification to bring Agent Console back in focus to handle the interaction.

Web Notification Alert

In order to receive web notification alerts for incoming interactions, your browser must be either:

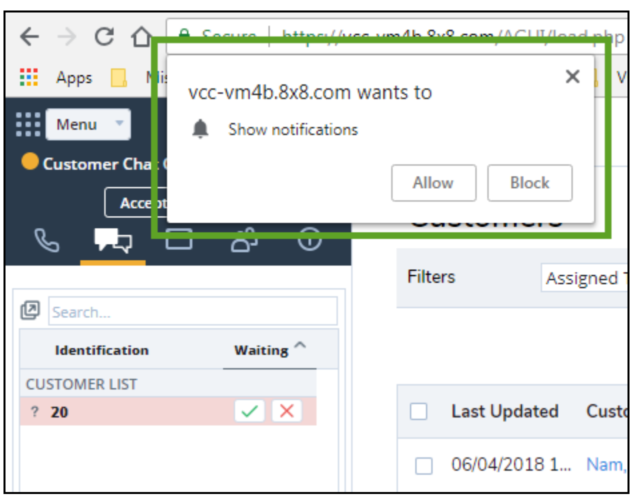
- Google Chrome 22+
- Mozilla Firefox 22+

Limitations

- Internet Explorer does not support web notifications.
- Firefox closes web notifications automatically after a few moments. This is a browser limitation.

How it Works?

1. The first time an agent receives a new interaction, they are prompted to allow or block interaction notifications from the application domain. This prompt may vary from browser to browser and is required to avoid notification spam.



Notes:
- If an agent disables the display of notifications but later changes their mind, they must manually re-enable it in the browser preferences, as the prompt is presented only once.
- Prior to Chrome version 37, the prompt is triggered by user actions such as mouse or keyboard events.

2. If the agent accepts to be notified by the application, a notification pops up whenever a new chat, email, phone or voicemail interaction comes in. The behavior and appearance of notification depends on the browser and operating system from which they are triggered.

Note: Chrome shows up to three notifications at a time; older notifications must be dismissed to give place for newer ones. All notifications can be read by clicking the Chrome notification icon in the system tray (Windows) or menu bar (Mac). The behavior varies depending on the browser and OS combination.

3. Each notification displays the interaction type in its title, and the customer name (if any) in its body. The agent can then click the notification to bring Agent Console back in focus. This behavior may vary depending on the browser and OS used.

Note: Clicking the notification does not accept or reject the interaction. The agent must handle the interaction manually.

Manage Multiple Tasks

The multi-tabbed interface in Agent Console gives the flexibility to manage multiple tasks. For example, If you are making some changes to your profile and do not want to block any interactions, you can keep your status as Available. Accepting a new interaction triggers a screen pop in a separate tab without interrupting the changes to your profile.

Process Phone Interactions

Most contact center agents are assigned to one or more phone queues. Phone queues prioritize and deliver phone interactions to agents whose status is Available, and who are assigned to an enabled queue. See Set Your Status for available agent statuses.

Features

The Agent Console phone controls allow you to:

- Accept inbound phone interactions.
- Record phone interactions (if settings permit).
- Transfer phone interactions to different agents, phone numbers, or phone queues.
- Initiate outbound phone calls.
- Set up a multi-party phone conference.

To learn about opting in or out of queue assignments, refer to View Your Assigned Queues.

Inbound Phone Call Flow

Calls flowing into Virtual Contact Center stay in a queue until an agent is available. When an agent changes their status to Available, the longest waiting call in the queue is offered to the agent. Virtual Contact Center searches the Local CRM database for existing records based on caller ID, account number, case number, or any arbitrary data passed during the interaction. Searching based on arbitrary data requires customization of the CRM workflow and external IVR (eIVR).

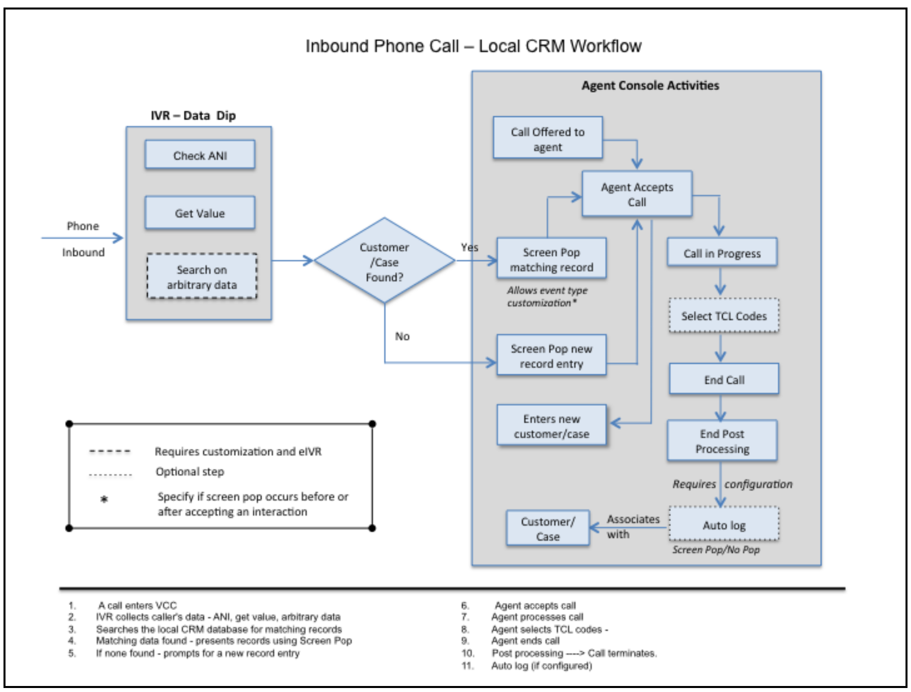
If the caller is an existing customer, the relevant customer or case record is presented to the agent through screen pop. A screen pop of matching data occurs either before or after an agent accepts an interaction, based on the screen pop settings configured by contact center administrator. The agent processes the call and selects transaction codes to indicate the call disposition. Selecting transaction codes may be optional or mandatory based on the settings. On ending the call, the agent gets post-processing time for a final wrap-up before the call terminates. If codes are mandatory, the call stays in post-processing mode until codes are selected.

At the termination of the call, Virtual Contact Center may create an auto call log. If the administrator has configured an auto log, one of the following auto log events occurs:

- screen pop auto log in view mode
- screen pop auto log in edit mode
- no screen pop

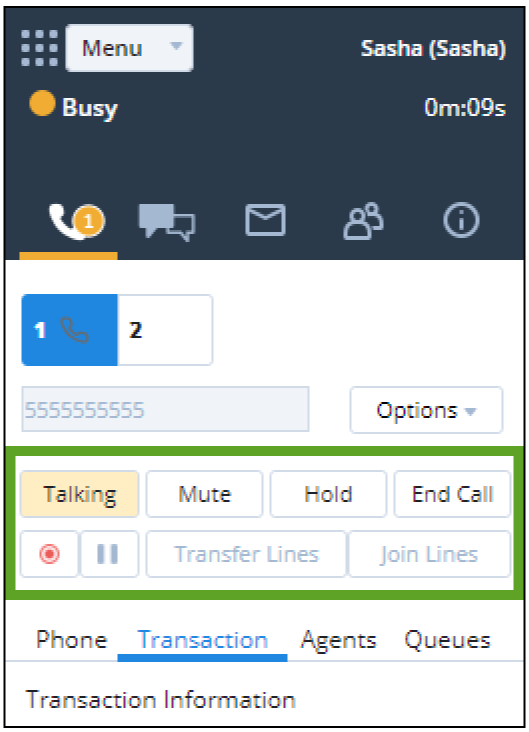
Note: Interaction auto logs require administrator configuration.

The sequence of events in an inbound call flow may be represented as follows:



Overview of Phone Controls

The Phone tab in the Control Panel provides all controls required to process both incoming and outgoing phone interactions. The availability of the controls dynamically adjusts to the configured privileges and the processing state of an interaction. For example, when an agent accepts an incoming call, controls such as Hold, Mute, and End Call get enabled. If an agent has the privileges to control call recording, then controls to stop and resume call recording are enabled during an active call.



The following table summarizes the various phone controls, and their purpose and availability:

Phone Control Button	Purpose
Dial/Talking	Enter a destination phone number in the number field, and click **Dial** to initiate an out-bound call. Talking button appears during an active call instead of Dial button.
Mute	Mutes self during an active call.
Hold	Places an active call on hold.

Phone Control Button	Purpose
End Call	Ends an active call after selecting mandatory transaction codes, if any.
Transfer Lines	Transfers calls from one phone line to another.
Join Lines	Joins calls on the two telephone lines to set up a conference.
Stop recording/Resume recording	Stops recording an active call. (Availability is subject to privileges) Resumes recording. (Availability is subject to privileges)

Note: Always use the Agent Console phone controls to select phone lines or perform functions such as Mute or Hold, but not the controls on your agent telephone.

Agent Console supports two phone lines: **1** and **2**. When switching between two lines for purposes of transferring a phone interaction or setting up a multi-party phone conference, Agent Console automatically places the line you are switching from on hold.

Accept Phone Interactions

As an agent, you are ready to process new phone interactions when you change your status to Available. If you are assigned to a phone queue, you are offered the interactions waiting to be served in that queue. For an overview of an inbound call flow, refer to Inbound Phone Call Flow.

To accept an inbound phone interaction:

1. In the Control Panel, change your status to **Available**.
   Agent Console offers new phone interactions only to available agents assigned to an enabled phone queue.

   Note: The Reject interaction button is disabled if your contact center administrator has not granted the permission. This prevents agents from rejecting the interactions they are offered.

2. When your agent telephone rings, answer the call.
   Your status changes to **Busy**.
   If the Local CRM uses the caller's phone number to identify an existing customer, the Display Panel pops the customer's CRM record.

> **Note:** Your contact center administrator determines the event that triggers a screen pop. Based on the configuration, screen pop may occur before or after accepting or completing an interaction.

> **Note:** If the screen pop fails to open, clean up your browser cache and cookies and log back in.

3. Process the call. If the customer wishes to make a payment using a credit card, click to open the 8x8 Secure Pay. While your connection is still maintained with the caller, you can only hear a single-tone DTF and see the starred out digits for the card number. For details, see our content on handling payments via 8x8SecurePay.
4. If required, select the **Transaction Code** before ending the call.
5. Click **End Call** in the Control Panel to initiate the post processing countdown timer. Your status changes to **Post Processing**.
   If the post processing countdown interval reaches zero, Agent Console automatically sets your status to **Available**.
6. Click **End Post Processing** to make your status **Available**, or click **Work Offline** if you need more time to complete any post processing tasks. The system routes the call to the agent who has been idle the longest. By default, agents are considered idle from the time they end post processing of a system-delivered interaction. Depending on the back-end configuration, the idle time can also be reset when the agents change their status. For example, in addition to the default reset, the idle timer can be reset when agents change their status from On Break to Available.

> **Note:** In Virtual Contact Center, idle time refers to the length of time agents have been idle and is measured for each agent by the agent's idle timer. By default, an agent is considered idle from the time he ends post processing of a system-delivered interaction and becomes available. When multiple agents with the same queue and skill level assignments are idle, the system routes the call to the agent who has been idle the longest. The agent’s idle timer is reset every time they end post processing of a system-delivered interaction. This reset persists until the same scenario is repeated. Agent-initiated interactions do not reset the idle timer. A tenant-wide setting also allows resetting the idle timer when agents transition from one status to another.

Note: If your contact center administrator has set up codes to state the purpose of an interaction or record the outcome of an interaction, you have to select appropriate codes to indicate the call outcome. For more information, see Select Transaction Codes.

Record Phone Interactions

Agents can record their phone interactions with customers for different purposes, such as quality assurance. Because recording a phone interaction uses some amount of your contact center's recording storage space, always consult your contact center supervisor before using the recording feature. Your supervisor provides you with specific examples that you can use this feature. You may utilize recording feature per your supervisor's instructions, and if your contact center has enabled you to record phone interactions.

Depending on your call recording permission, you may see:

- **Start Call Recording**: If you have the permission to start call recording, when a call connects, the Control Panel shows the recording button . You can click the button to start recording the call at any time. The recording button is highlighted while a recording is in progress.
- **Start and Pause Call Recording**: When a call connects, the Control Panel shows the Recording button and a Pause button . Click the Recording button to start recording, and click Pause to pause the recording.
- **No Recording Controls**: If you do not have recording permissions, the Control Panel does not show any recording control buttons during a call.

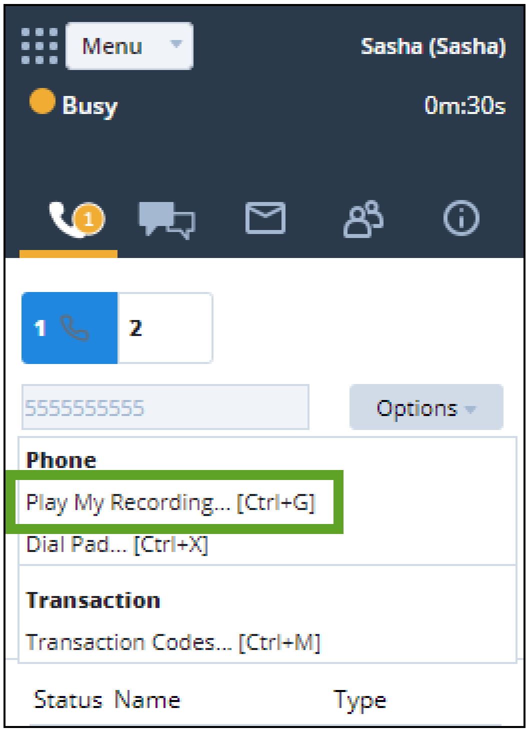
Play Your Recorded Messages

Agent Console allows you to play your messages during an inbound or outbound call. When you place an outbound call and reach voicemail, you can choose to play your pre-recorded message, such as a campaign message, and hang up. The application plays the message and terminates the call. During an inbound call, you may choose to play a welcome message or greetings if you have direct agent access. See Record Your Messages for details.

To play a recorded message during a phone interaction:

1. In the Agent Console's Control Panel, go to Phone tab.
2. When a call connects, click **Options > Play My Recording**.

   Your list of pre-recorded messages is displayed.



3. Select the recording you wish to play and click **Play**.

   The caller hears your recorded message.

Add Notes During an Interaction

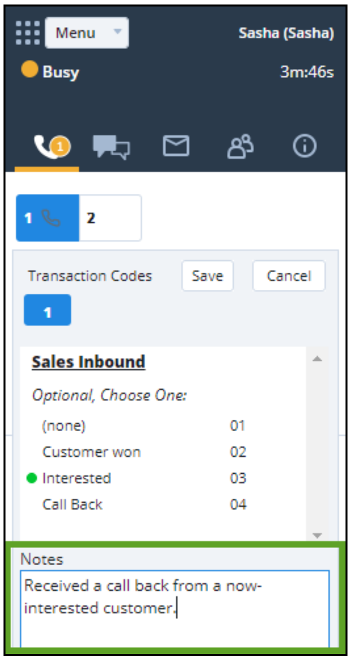
You can add notes regarding an interaction during an inbound/outbound phone call, or during a chat conversation. It enables smooth transition of an interaction from one agent to another. For example, if you have left a voicemail to a customer, you can leave a note to the next agent about the voicemail who handles the next interaction with the same customer in the future. The notes panel can be accessed via the Options menu in the Control Panel.

In Salesforce CRM, the notes are saved in the call log of the activity history. The agent who handles the next interaction with the same customer can refer to the call log and view the notes.

Note: This feature is applicable to the Enhanced integration of Multichannel Connect for Salesforce.

To access notes panel during a phone or chat interaction:

1. During an active call or chat interaction, click **Options** under the Phone tab.
2. Click **Transaction Codes**.
   The **Notes** panel shows below the transaction codes.



3. Enter the notes in the panel, and click **Save**.
   The saved notes appear in the Detailed Accepted Transaction Report.

Transfer Phone Interactions

An agent can transfer a call to another agent upon customer request or knowing that the other agent may have more knowledge answering the customer's question. A Virtual Contact Center agent has access to two telephone lines from Agent Console Phone tab, which allows transferring the calls. Before transferring a call, you can check the status of other agents, consult an available agent, or transfer blindly without consulting.

Virtual Contact Center allows agents to transfer an active call to another agent, a queue, or an external phone number:

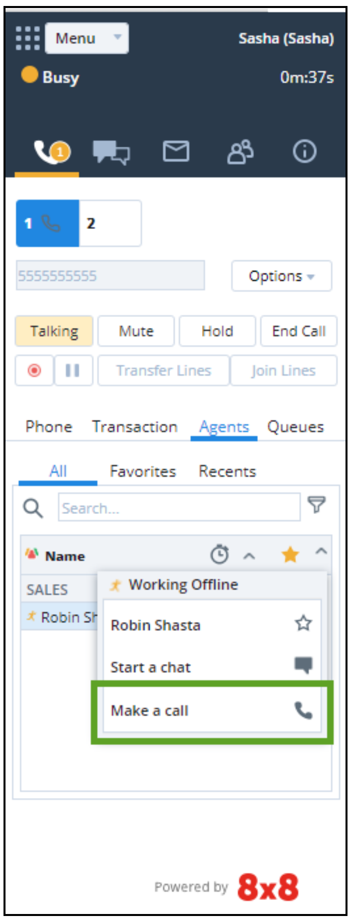
- Transfer phone interactions to another agent
- Transfer phone interactions to another phone queue
- Transfer phone interactions to an external phone number

Transfer Phone Interactions to Another Agent

Virtual Contact Center allows agents to transfer an active call to another agent or queue. Before transferring a call, you can check the status of other agents, consult an available agent, or transfer the call blindly without consulting.

To transfer an active phone interaction to another agent:

1. Notify the current caller about the transfer.
2. While in an active call on line **1**, click line **2** in the **Phone** tab.
   Agent Console automatically places the phone interaction on line **1** on hold.



3. Click the **Agents** tab to see a list of agents currently logged in to Agent Console and their current status.
   You can consult an available agent before transferring the call, or transfer blindly. You can consult the agent by phone or chat.

4. To consult the second agent before transferring the interaction:
   a. Make sure you have switched to line **2**.
   b. Select an agent from the list, and click to bring up the context menu.
   c. Initiate a call or a chat with the agent by choosing **Make a call** or **Start a chat**.
   d. Inform the agent you are transferring a phone interaction to them, then click to complete the transfer.

      Agent Console submits a new phone interaction to the selected agent, then changes your status to **Post Processing**.
5. To transfer the interaction without first speaking to the second agent, select an agent, then click **Blind Transfer**. Agent Console sends the phone interaction to the selected agent, then changes your status to **Post Processing**.

> **Note:** If the second agent does not answer the phone, and the agent does not have Virtual Contact Center voicemail, then the call is dropped after the timeout period.

6. Click **End Post Processing** to make your status Available, or click **Work Offline** if you need more time to complete any post processing tasks. For information about your contact center's timeout interval, contact your contact center administrator.

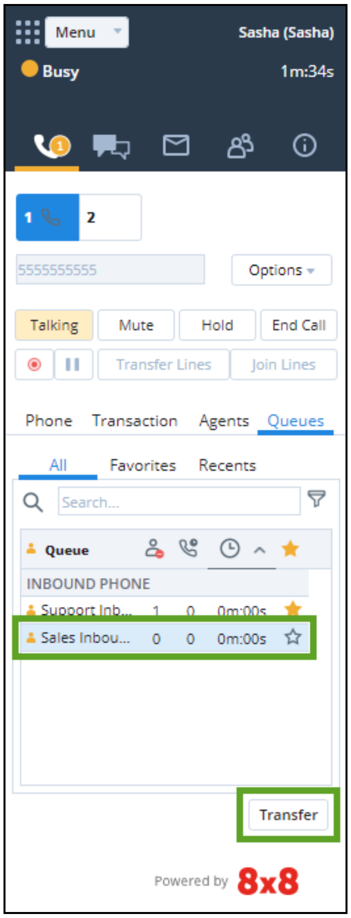
Transfer Phone Interactions to Another Phone Queue

Virtual Contact Center allows agents to transfer an active call to another phone queue. Before transferring an active call to another queue, the agent handling the call should check the status of the destination queue and then transfer.

To transfer an active phone interaction to a different queue:

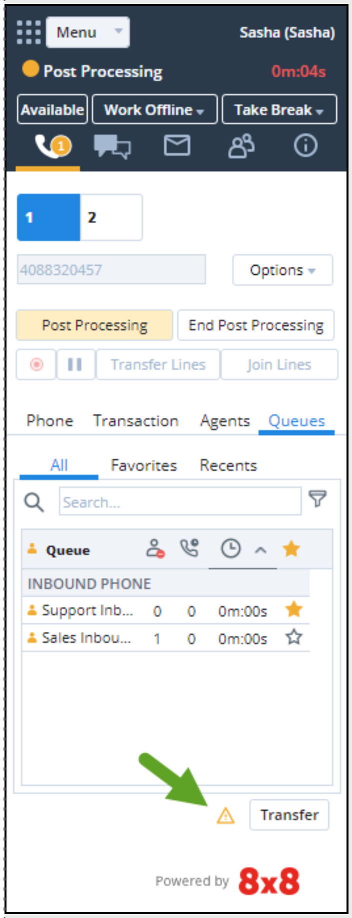
1. During an active call, announce to the current caller that you are going to transfer them to another department.

2. Open the **Phone** tab, then click the **Queues** tab.
   Agent Console does not place the phone interaction on line **1** on hold.



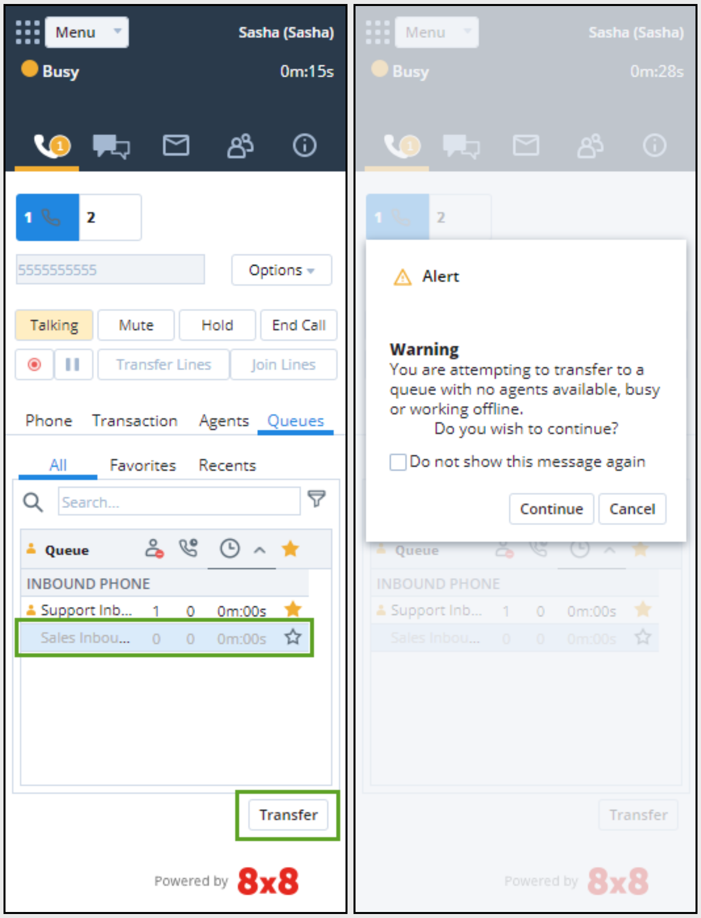
3. Choose a queue, and click .

Note: Agents may experience some delay in accessing the entire list of queues whether or not they are part of them. An exclamation symbol next to the Transfer button indicates the partial loading of the queues. Depending on the number of queues and their sizes, it may take some time for the entire list to load.



Agent Console transfers the phone interaction to the selected queue, then changes your status to **Post Processing**. The transferred call stays in the queue until answered by an available agent in the queue.

Note: If you wish to transfer to an unattended queue, you receive a warning about the non-availability of agents, or you may be blocked from transferring. You can disable the warning message by selecting **Do not show this message again** only if your Virtual Contact Center administrator has given you the right permission. Disabling the warning message prevents you from receiving this message again. Click **Continue** to transfer the interaction.



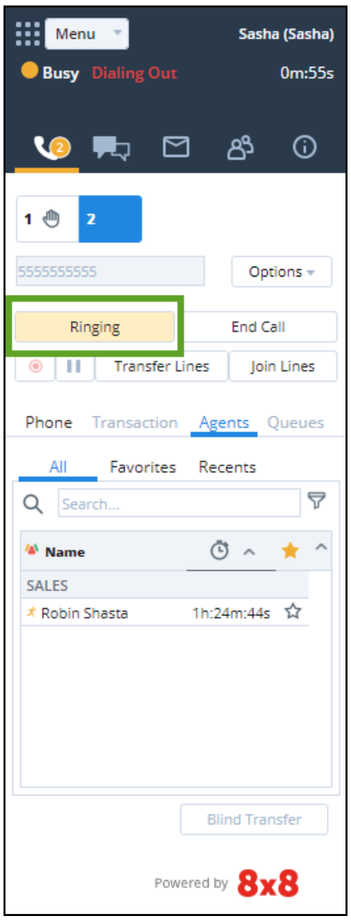
4. Click **End Post Processing** to change your status to Available, or click **Work Offline** if you need more time to complete any post processing tasks.

Transfer Phone Interactions to an External Phone Number

Virtual Contact Center allows agents to transfer an active phone call to an external phone number.

To transfer a phone interaction to an external number:

1. Announce to the current caller that you are going to transfer them to another telephone number.
2. While in an active call on line **1**, click line **2** in the **Phone** tab.
   Agent Console automatically places the phone interaction on line **1** on hold.
3. Type a telephone number then click **Dial**.
   - In the United States, type <1> before the area code.
   - If Agent Console prompts you to choose a Transaction Code, choose a code from the list, and click **Save**. See Select Transaction Codes for more information. Ringing appears instead of Dial, indicating that Agent Console has called the number.



4. After the second party has answered the phone, tell the second party you are transferring a phone interaction to them, then click to complete the transfer. Agent Console changes your status to Post Processing.

5. To transfer the call before the second party answers the phone, click .
   Agent Console forwards the call, then changes your status to Post Processing.

   Note: If the second party does not answer the call, and the second party does not have a voice mailbox, the call eventually times out and is dropped.

6. Click **End Post Processing** to change your status to Available, or click **Work Offline** if you need more time to complete any post-processing tasks. For information about your contact center's timeout interval, contact your contact center administrator.

Overview of Conference Calls

An agent can bring another agent or an external party into a conference call. For example, an agent may want to consult the case with another agent or supervisor who is an expert while the customer is present on the phone. You can create a conference at any time between an active call and another agent, or an external party by pressing the Join Lines soft key.

Agent Console uses line **1** to conduct a multi-party conference, and line **2** to connect each additional participant. Each time you connect a new participant to the conference, Agent Console automatically connects the new participant to line **1**. Line **2** becomes available to connect additional conference participants.

Agent Consoleallows you to set up multi-party conference calls. During a conference call, you can:

- Add Agents to a Conference Call
- Add External Parties to a Conference Call

Add Agents to a Conference Call

Perform the following procedure to add another agent who is logged in to Agent Console to a conference call. The agent's status must be either Available or Working Offline.

To add an agent to a conference call:

1. Announce to the current caller that you are going to add them to a multi-party conference call.
2. Open the **Phone** tab, and click line **2**.
   Agent Console automatically places line 1 on hold.

3. Click the **Agents** tab to view a list of agents currently logged in to Agent Console, whose status is either Available (shown as Waiting in the list) or Working Offline.
4. In the list of agents, select an agent, then click **Make a call**.
   Agent Console submits a new phone interaction to the selected agent. After the phone has been answered, the sound of a human or recorded voice enables the **Join Lines** feature.
5. If you receive the agent's voicemail, click **End Call** to disconnect the call and return to line 1.
6. If the agent answers, tell the agent that you are adding them to a conference, then click **Join Lines**.
   Agent Console connects the agent and you to any conference participants already on line 1.
7. Click **End Call** to disconnect from the conference.
   Agent Console leaves the other parties connected to the conference call.

Add External Parties to a Conference Call

Perform the following procedure to add an external party to a conference call.

To add an external party to a conference call:

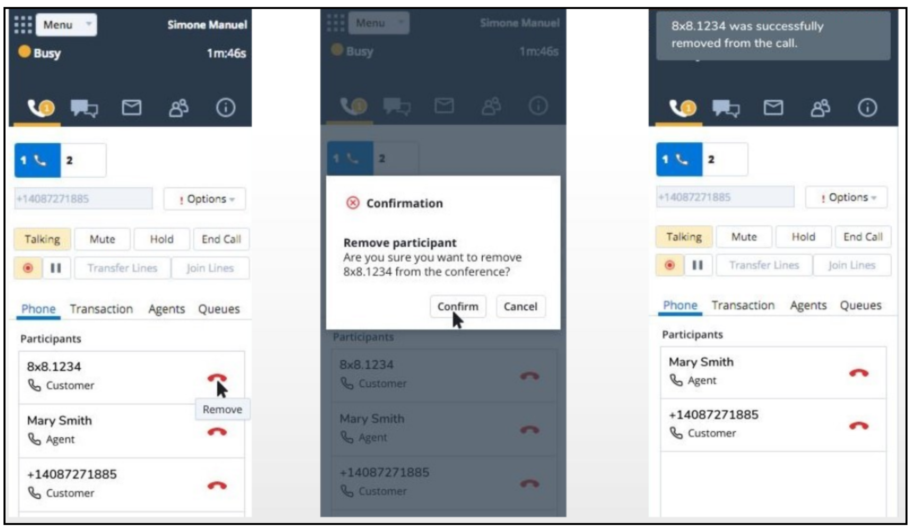
1. Announce to the current caller that you are going to add them to a multi-party conference call.
2. Open the **Phone** tab, and click line **2**.
   Agent Console automatically places line 1 on hold.
3. In the number text entry area, type a telephone number, and then click **Dial**.
   - In the United States, type *1* before the area code.
   - If Agent Console prompts you to choose a Transaction Code, in the list of codes, choose a code, then click **Save**. For information about choosing Transaction Codes, see Select Transaction Codes.

   Agent Console dials the number. After the phone has been answered, the sound of a human or recorded voice enables the **Join Lines** feature.
4. If you receive the agent's voicemail, click **End Call** to disconnect the call and return to line 1.
5. If a person answered the phone, tell them that you are adding them to a conference call, and then click **Join Lines**.
   Agent Console connects both the new participant and you to any callers already on line 1.
6. Click **End Call** to disconnect from the conference.
   Agent Console leaves the other parties connected to the conference call.

Remove an Agent from a Conference Call

We have now introduced the concept of a Host and added hierarchical control to conference calls. In this new behavior, the host can remove participants without requesting them to take any action. When a conference call is created, the longest connected agent becomes the host, unless there is a supervisor present, in which case, the supervisor will be the host. The host is then dynamically transferred when participants join and leave the call. For example, when a supervisor host leaves a call, the ownership passes to the next longest present supervisor, or if none are on the call, to the longest present agent.

Prior to this release, when agents, supervisors, and other participants were on a conference call, agents and supervisors relied upon the goodwill of participants to drop their connection and leave the call. To remove a participant as a host, while in a conference call in Agent Console, click next to the participant's name and click **Confirm**. For details, see our content on Conference Calls.



Features

- Introduces the concept of Host who has control over the removal of participants.
- Adds a hierarchical control to conference calls.
- Allows removal of participants without requesting them to take action.
- Brings control to the session instead of relying on the participants to drop their connection and leave the call.

Assumptions and Conditions

- A conference call is defined as three or more parties on a call. A call with two parties is not considered a conference call.
- The longest connected agent is the host, unless there is a supervisor on the call. If there is a supervisor on the call, the longest connected supervisor is the host.
- Only one active host exists in any conference call.
- The first supervisor to join the conference becomes the host. if there are other supervisors in the call, supervisor is just a participant that may become the host after previously connected supervisors leave the conference.
- Participants rejoining an existing conference assume a new connection and do not hold any host rights from earlier in the call.
- A supervisor that rejoins a call where there is no other supervisor becomes a host.
- Where a supervisor joins in a whisper or monitoring mode, they do not create a conference by being the third caller nor do they join an existing conference.
- A call reducing to just two parties, drops the hang-up feature and returns to a normal call.

Use Case

The following scenario provides an example of how the new conference call enhancement works:

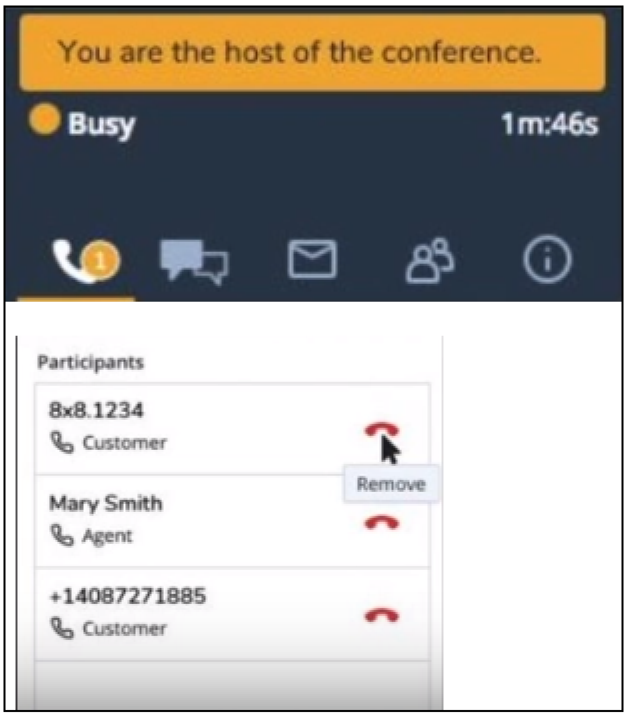
- Agent 1 (HOST) initiates the call and adds Agent 2 and the Customer to the call.
- Conversation requires the knowledge of Supervisor 1.
- Supervisor 1 is added that is now the HOST.
- Conversation requires Supervisor 2.
- Supervisor 2 is added, Supervisor 1 is still the HOST.
- Supervisor 1 leaves the call.
- Supervisor 2 is now the HOST.
- Agent 1 leaves the call.
- Supervisor 2 is still the HOST.
- Customer leaves the call.
- Conference is over.

Remove Agents from a Conference Call

When a conference is created, the host receives a brief message (5 seconds display) that advises them of their new status. Virtual Contact Center users can see the names of other participant. The host is marked and can see the Remove button for all other participants in the list.

To remove agents from a conference call:

1. Log in to the Agent Console.
2. Join a conference call as a host. A supervisor or the longest connect agent in the call becomes the host.



3. Click to remove a participant from the call, a confirmation message appears. Click **Confirm**.
4. A removed participant gets a notification of their removal.
   If the host changes during a conference call, the old and new hosts receive a confirmation of their change of status and the **Remove** button only shows up for the new host.

> **Note:**
> - The new participants joining the call appear at the top of the list.
> - The host is informed if a participant leaves a call on their own.

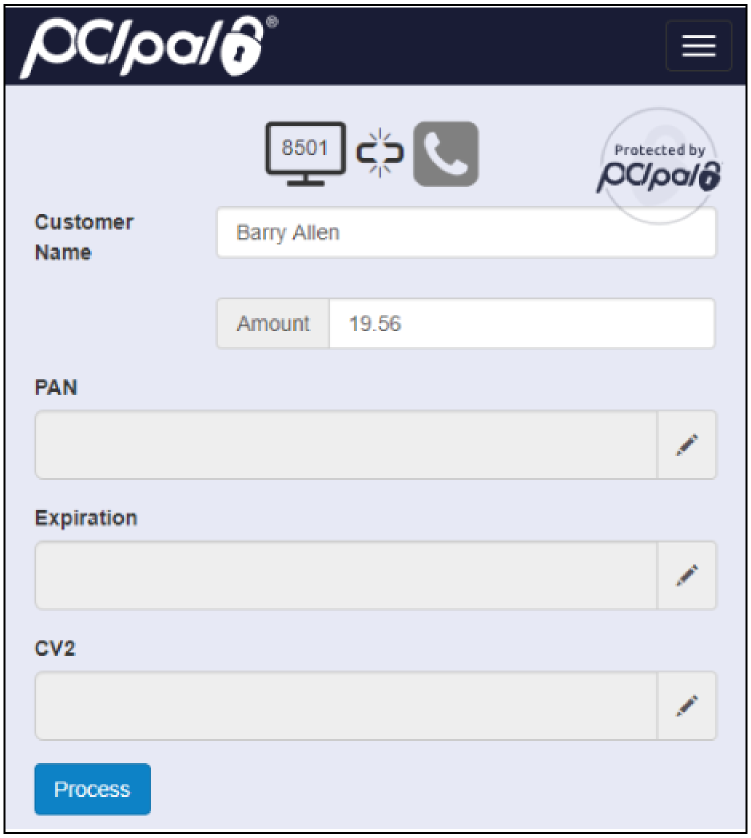
5. Click **End Call** to disconnect from the conference.
   If the host leaves the call, other parties remain connected to the conference call and the ownership passes to the longest present supervisor. If there is no other supervisor, the longest present agent will be the new host. If the call reduces to just two parties, it drops the conference feature and returns to a normal call.

Manage Card Payment Via 8x8 Secure Pay

8x8 Virtual Contact Center now offers customers a secure integration to support the processing of bank card information via our partner PCI Pal. 8x8 Secure Pay enables an agent and customer to stay in contact on a call while masking the card input from the customer's handset so that the sensitive card data stays secure and out of the contact center. The service can be integrated with a CRM, Enterprise Resource Planning (ERP), or a billing system and the customer's payment gateway to process the payment. The service can also feed information about the payment back to the originating system.

This new integration offers agents a secure payment page for processing customer transactions. The secure payment page can be configured to include pre-populated data or data that the agent adds manually. When this page is opened, the media connection is rerouted via PCI Pal, which allows them to mask the keypad input both visually and audibly.

The agent hears the conversation and controls the card input, but only hears a single-tone DTMF and sees starred out digits for the card number, date, and Card Verification Value (CVV). In the event of erroneous data input by customers, an agent can reset the relevant data field in the payment page, allow customers to fix the input, and facilitate a successful transaction.



Collecting Card Payment Via 8x8 Secure Pay: An Example

The agent's experience for taking a payment via PCI Pal depends on a number of factors. Given that the customer system producing the payment request and payment gateway accepting the card details could potentially be a different combination for every customer, there is no blueprint for that journey. The ability of the custom system to integrate with PCI Pal determines the amount of data that can be prepopulated or what needs to be manually inputted by the agent. Once the payment page is complete and ready for the card payment to be taken, it is a similar experience for all. The following example is a sample workflow that demonstrates how an agent collects card payment via 8x8 Secure Pay:

While on an active call, the agent receives a verbal confirmation from the customer to start the payment process. When the customer is ready to pay with the credit card:

1. As a contact center agent, click the provided link or button on your CRM page to initiate a secure session.
   The 8x8 Secure Pay button appears on your screen and can be customized. A secure payment session is indicated by the color of PCI pal logo or the phone icon shown on the header of the payment page.

Note: When the session is secure, the PCI pal logo changes color from ***PCIpal*** to ***PCIpal***.

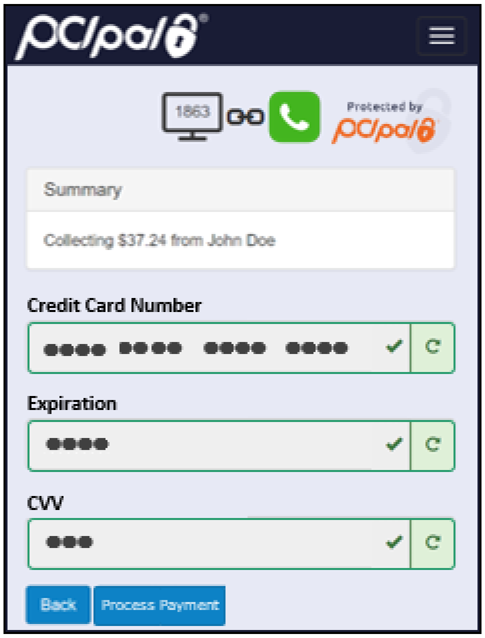
- Gray indicates the payment session has started, but the telephony is not yet secured against the payment session.

- Green indicates the session is secure. In addition to the green phone icon, the chain to left also links together.

A unique four-digit session pin is offered for the secure session.

2. Enter the customer information such as the total **Amount**, **First name**, **Last name**, **Email**, **Address** and **Zipcode**. The fields with red asterisk * are mandatory.
3. Click **Next** to open the card data collection page. The total payment amount is carried forward to the next page.
4. Invite the customer to enter the **Card number**, **Expiry date**, and the **Security code (CVV)**. When the customer begins the card date input, you will hear a single-tone DTMF and see starred out digits for the sensitive information. If the information is valid, the fields turns green.

5. Click next to a field to reset the incorrect data and invite the customer to reenter the data.



6. Click **Process payment**. The payment is sent to the gateway.
7. Click **Send email** or **Send SMS** to send a payment confirmation to the customer. If the payment fails, inform the caller that the payment is declined.
8. Click **Back** to allow the customer to enter new card data, or edit the existing and submit the payment again. The customer can retry using a different card and repeat the process.
9. Click **Finish session** to end the session and go back to the first screen.

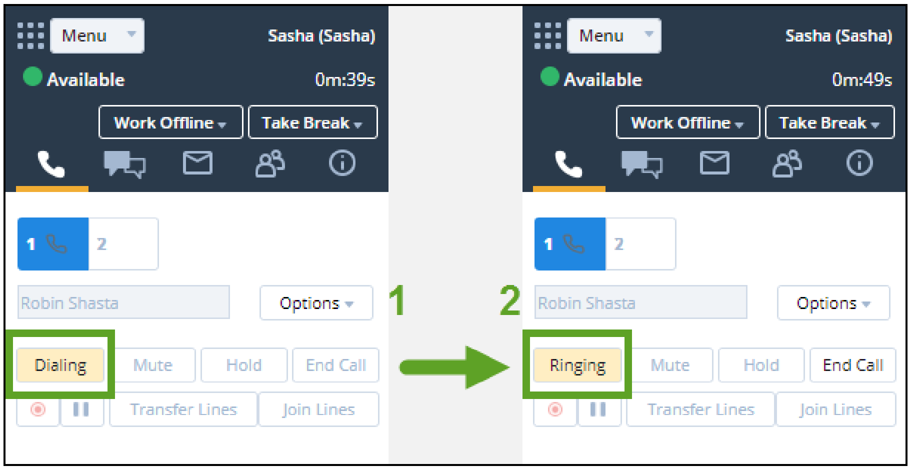
Make Outbound Phone Calls

Agent Console allows you to make outbound phone calls to:

- Agents
- External phone numbers

Agent Console uses a two-step process to dial an outbound call:

1. Enter or click a number to call. Agent Console dials your agent telephone number first.
2. Answer your agent telephone. Agent Console dials the external phone number.



Contact your supervisor for your contact center's policies for using Agent Console to place outbound calls.

Call Agents

You can call another agent by entering their full phone number in the Phone tab, or by selecting the menu option in the Agent Status tab.

Note: You need to be part of the same functional group to be able to see and call another agent. However, supervisors can see and call the agents of other groups.

Note: All agent-to-agent dialing requires the right settings in Dial Plans.

To call another agent using the Phone tab

1. Open the **Phone** tab.
2. Enter the agent's full telephone number in the entry box.
3. Click **Dial**.
   The call is established.
   See Transfer Phone Interactions to Another Agent if you like to transfer the call.

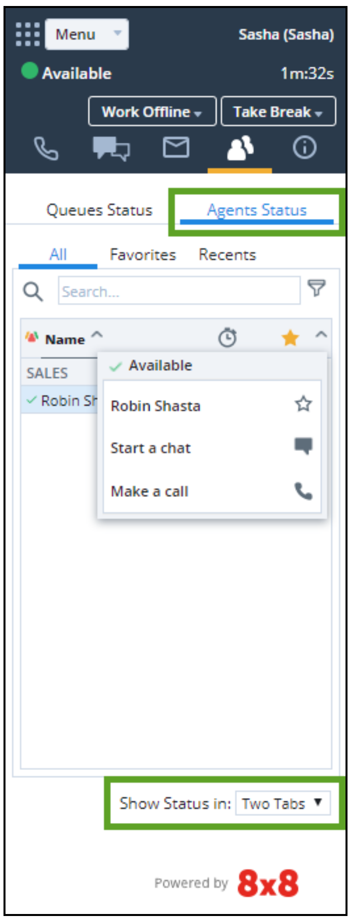
To call another agent using the Agent Status tab

1. In the Control Panel, go to the **Status > Agent Status** tab from the Two Tabs view.

> **Note:** The view in the Status tab changes depending on whether you choose to view in **One Tab** or **Two Tabs**.

2. Find the agent in the list, and left-click.

   A menu appears.



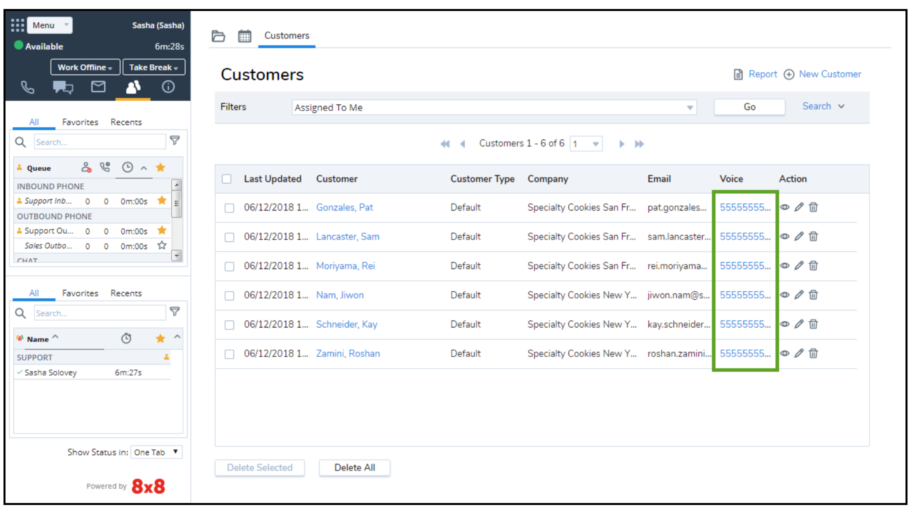
Note: The list of agents can also be accessed from Phone and Chat tabs. Go to **Phone > Agents** or **Chat > Agents** to see them.

3. Select **Make a call** from the menu options.
   A call is established to that agent.
   See Transfer Phone Interactions to Another Agent if you like to transfer the call.

Call External Phone Numbers

You can place outbound to an external phone number using one of the following ways:

- **Control Panel**: Ability to dial outbound calls from the Agent Console Control Panel by simply entering the phone number under the Phone tab and clicking **Dial**.
  Agent Console dials your agent telephone number first. Answer your agent telephone, and Agent Console dials the external phone number.
- **click-to-dial**: Ability to click and dial phone numbers from records in Local CRM or External CRM.
  The click-to-dial option is available out-of-the-box in Local CRM. For External CRM, however, some configuration is necessary.



- **web callback**: A system-generated outbound call placed in response to a customer request. If a callback is scheduled to a campaign customer, a reminder pops up at the scheduled time to the same agent who scheduled the callback. The agent then has to manually place a call.

Dial Digit Tones

During a phone call, agents may encounter problems communicating digit tones to an IVR system using the telephone key pad. For example, during an outbound call, an agent inputs an account number in response to an IVR system prompt; the account number may be conveyed incorrectly due to digit audio leakage during transmission among diverse networks. Keyboard dialing provides an alternative mechanism to counteract this issue. It offers an alternate long tone method through a Virtual Contact Center Dial Pad interface to convey digit tones from Agent Console to a touch tone IVR system across diverse networks, limiting the possibility of digit audio leakage.

Keyboard dialing allows an agent to generate two types of digit (DTMF) tones: Short Tone, and Long Tone. When the default short tone fails, an agent may select long tone using the Dial Pad interface to communicate the information correctly to the destination IVR system.

Features

Keyboard Dialing features the following behavior:

- Available during any active phone call session.
- Supports two types of digit tones: short tone, and long tone.
- Preserves the digit tone setting per agent, per browser, and per workstation. If an agent logs out and logs back in to the same workstation, previous digit tone settings are maintained until the next manual change.
- Shares between two busy lines in a two-line call. The dial pad stays open when agent switches between two busy phone lines.
- Generates digit tones for the active line only, in the event of an agent handling two busy lines.
- Allows navigating voicemail IVR to access voicemail.

Limitations

Keyboard dialing has the following limitations:

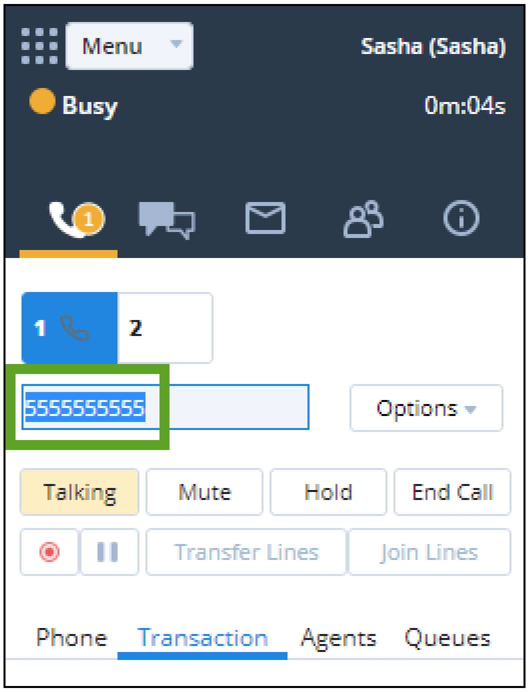
- Not readily available when call is muted.
- Not supported for Virtual Contact Center CTI Connect for Salesforce.
- Not supported for recording personal greetings during verification calls.

Access Dial Pad

During an active call session, you can use the keyboard or the Dial Pad for digit tone dialing. The Dial Pad enables you to change digit tone duration. When an agent accepts a phone call, the Options menu gets activated in the Control Panel. The Options drop-down menu includes the Dial Pad feature.

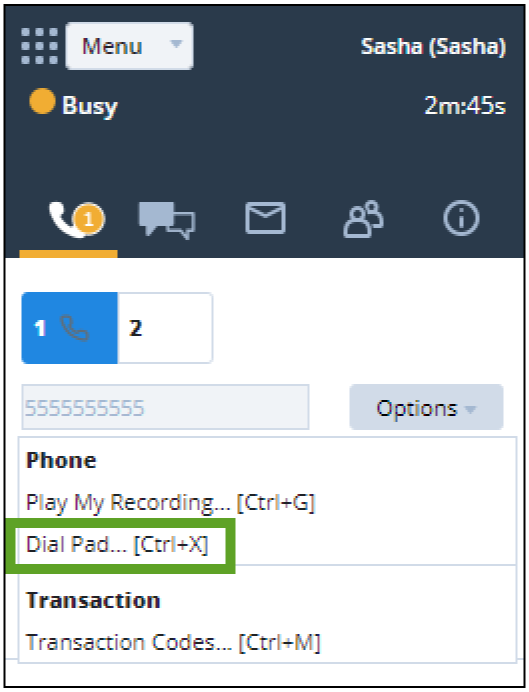
To dial digit tones using keyboard:

1. Place the cursor focus in the phone text box.

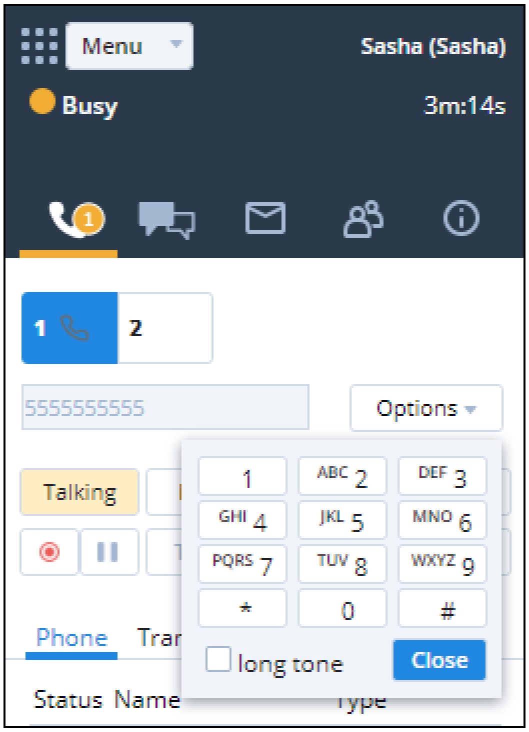


2. Enter the numbers on the keyboard. You may hear the short tone transmission.
3. To change the digit tone duration, click **Options**, and select Dial Pad from the drop-down menu.
   OR

press **CTRL+ X** to bring up the Dial Pad.



4. Select the **long tone** check box (clear the check box to switch back to short tone).



5. Input the digits or characters using the keyboard or the Dial Pad.

Manage Your Status During Outbound Calls

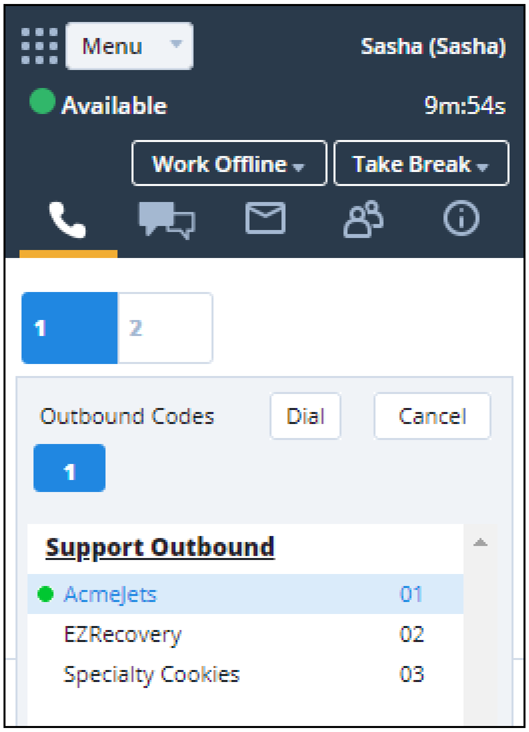
During outbound calls, your status changes to Busy, or preserves your current status. You can route the call through a queue by selecting an outbound phone code, provided that your contact center administrator has set it up. Your status changes to Busy. If you do not route the call through an outbound queue, your current status is preserved. For example, if your status is Available while making an outbound call, and you do not route the call through a queue, Agent Console leaves your status as Available, offering new incoming phone interactions.

Change Your Status to Busy

Changing your status to Busy during an outbound call requires you to route the call through a queue. This is enabled through outbound phone codes, where each code is associated with an outbound queue. You must be a member of the outbound phone queue, as well as be assigned to the code list.

To change your status to busy during an outbound call:

1. In the Phone tab, enter a phone number, and click **Dial**.
   You are prompted to select an Outbound Phone Code.



2. Select a code from the list, and click **Dial**.
   The call dials out and routes through the specified queue, changing your status to Busy. It dials your phone first and then the destination number.

Retain Your Current Status

If you do not route an outbound call through a queue, your current status is retained and you are offered new incoming interactions if you are Available. This is not desirable when you are on another call. To work around the situation, you can follow the steps below:

If you are on an outbound call, and Agent Console offers you a new interaction, you have two options:

- Click **Accept Call** to have Agent Console place the existing call on hold. Place the incoming phone interaction on line **2**, connect your agent telephone to line **2**, and change your status to Busy.
- Click **Reject Call** to have Agent Console return the new interaction to the phone queue and change your status to Working Offline.

If you neither accept nor reject the new interaction, and the interaction acceptance interval reaches zero, Agent Console returns the new interaction to the phone queue, and changes your status to Working Offline.

Note: The Reject interaction button is disabled if your contact center administrator has not granted the permission. This prevents agents from rejecting the interactions they are offered.

Process Campaign Calls

The Virtual Contact Center Dialer is an automated outbound phone-based dialer that searches and retrieves a target call list from campaigns defined by the administrator. Campaigns are assigned to outbound phone queues, while agents are assigned to these queues. As an agent, when you change your status to Available, a campaign call is offered to you if you are a member of the queue a campaign is assigned to. The Control Panel on your Agent Console indicates an outbound call, and the Display Panel presents the contact record details for your preview. You can preview the contact record, and decide to start, reject (if permitted by administrators), or skip the call.

To process a campaign call:

1. Change your status to **Available** in the Control Panel.
   A campaign call is offered.

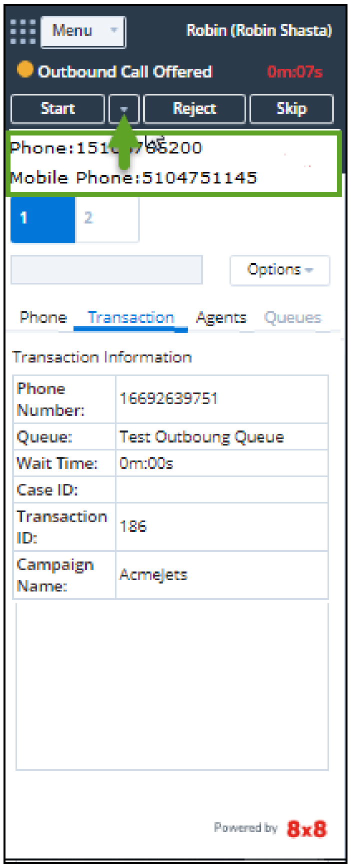
   The Phone tab blinks red. The Display Panel presents the complete contact record for preview, while the Control Panel indicates an outbound call.
2. After a quick preview of the contact record, you can decide to initiate, reject, or skip the call.

   Note: The Reject interaction button is disabled if your contact center administrator has not granted the permission. This prevents agents from rejecting the interactions they are offered.

   Note: If you do not accept the call within the timeout period, your status changes to On Break automatically.

   - To initiate the call, click **Start**. Your phone rings.
     a. Answer your phone. The destination number dials automatically if a default phone is selected.

b. In the absence of a default phone number, select a destination number to dial from the drop-down list of numbers.



c. Click **Options** to see processing options, such as playing a pre-recorded message, recording the conversation, or selecting a transaction code.

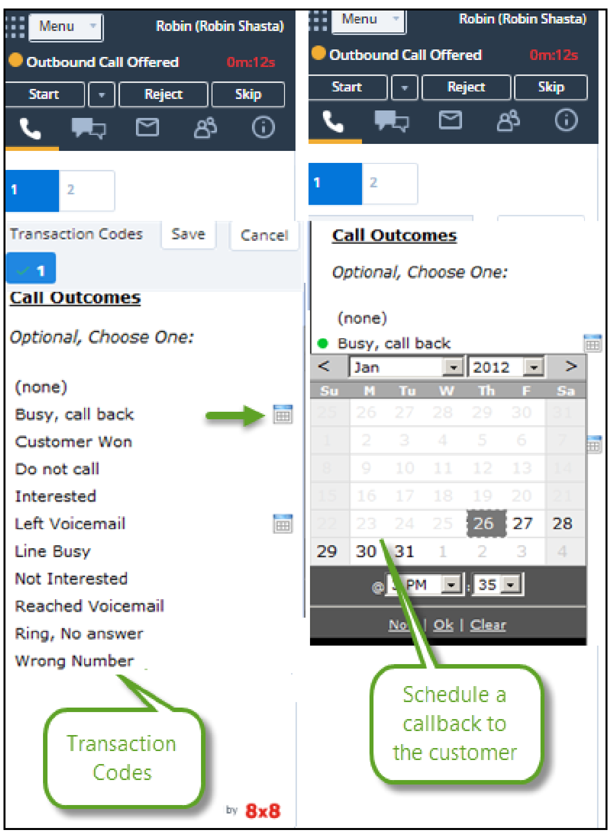
d. Select a desired option, and complete the call.

- To reject the call, click **Reject**. Your status automatically changes to **Work Offline**. The call is routed back to the queue for the next available agent.
- To skip the call, click **Skip**. The call skips, and the next call in the queue is offered.
  The skipped record is marked as completed.

Reschedule Campaign Calls

If a campaign call fails to reach the called party, you can set up retrial calls or schedule a callback automatically by selecting appropriate transaction codes that map to the following disposition actions:

- **Try Again**: sets up retrial attempts for a call as specified by the administrator. The retrial call is placed back in the queue and offered to any available agent within the specified time interval.
  For example, if you fail to reach the called party during a campaign call, you can select a transaction code such as Ring, No answer, or Reached third party, which maps to the Try Again disposition action, triggering retrial attempts for the call.
- **Schedule Call back**: allows scheduling a callback to a campaign customer, and pops up a reminder at the scheduled time to the same agent. The agent must manually place a call.
  For example, on reaching a destination number, if a customer suggests a time to call back, you can select a code to schedule a callback based on the customer's convenience.



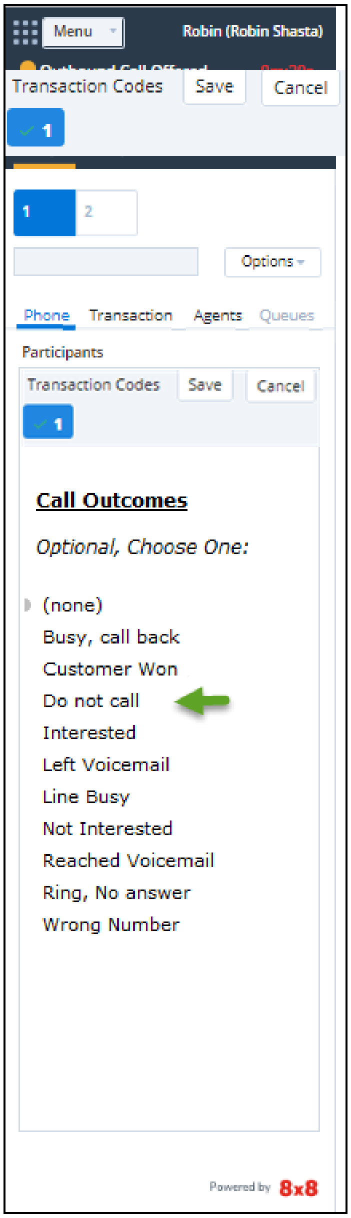
If you select a transaction code that triggers Schedule Call back, you are prompted to schedule a time for the callback using the calendar. Specify a date and time to call back, and a task is automatically created for the call. A reminder pops up a few minutes before the specified scheduled call with the call log. Click the call log to view the details of the scheduled call. The agent has to manually place the call to complete the task, and dismiss the task in the Reminder window.

Do Not Call Disposition

On reaching a contact during a campaign call, if the contact asks not to be called back again, you can select an appropriate transaction code to indicate the contact's choice. You can automatically save this information in the contact record if:

- the code is mapped to the Do not call disposition action.
- the campaign defines a field to capture the transaction code.

The Do not call disposition information is critical to filter the record from the campaign call list for recycling.



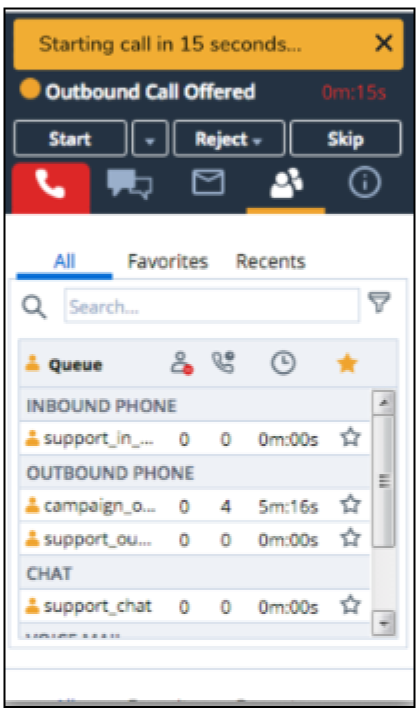
Improve Campaigns Call Handling

Improve your campaign call experience using the call handling features and services below. Some of these features will appear only when they are enabled by your contact center administrator:

- Auto Dial Campaign Calls after Preview
- Enable Persistent Connection Mode
- Enable Answer Machine Detection (AMD) Service
- Detect TCPA-Listed Phone Numbers via Carrier Call Blocking (CCB)
- Enable Agents Auto Answering
- Assign Automatic Transaction Codes (Auto-TCL) to Campaigns
- Allow Agents to Skip Campaign Calls While on Auto Answer

Auto Dial Campaign Calls after Preview

If autodial is enabled by your contact center administrator, a preview of the campaign record is offered and triggers the preview countdown. The option to reject or skip the call is also offered during the preview. A notification appears alerting the agent that a call is about to be placed if you do not take an action manually. The system then initiates a call automatically after the preview countdown times out. The minimum preview duration is 15 seconds.



Enable Persistent Connection Mode

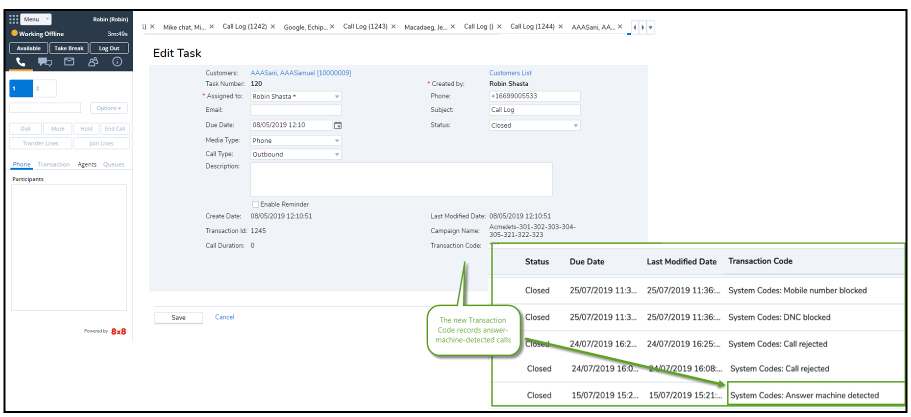
If your contact center administrator has enabled the Persistent Connection Mode, when you place an outbound call, the Persistent Connection Mode dials the destination right away eliminating the need to answer the call from your softphone or pick up the desk phone first. The call is connected right away. If also permitted by the administrator, agents can opt the Persistent Connection Mode in their profile. Go to **Menu > Profile** and select the desired mode.

Enable Answer Machine Detection (AMD) Service

If your contact center administrator has enabled the AMD service for your campaign, it identifies machine-answered calls and sends a one-way message to the call routing to end that call and resolve it automatically. AMD is a learning service and needs some time to build an effective library of known audio samples before it reaches the maximum efficiency. Once the library is created, the AMD service resolves a machine-answered call quicker than the manual effort of an agent. AMD works in conjunction with our new Auto-TCL. The transaction code for such calls appears as "Answer machine detected" in CRM Cases or under Historical reports.

AMD resolves a machine-answered call when the following acceptance criteria are met:

- There is an active interaction on an outbound call (non-active interactions include wrong numbers, numbers not in use, system messages).
- The call has a campaign ID from an AMD-enabled campaign.
- The elapsed time of an identified call can be terminated within the locally-configured threshold (two seconds in UK and US).



Note: The AMD service is only applicable to the calls routed via campaigns, but not the outbound calls placed by an agent.

Detect TCPA-Listed Phone Numbers via Carrier Call Blocking (CCB)

If your contact center administrator has enabled CCB for your campaign, the campaign dialer checks whether the outbound call's phone number is listed on TCPA list. When it detects a TCPA-listed phone number, the CCB terminates the call. A transaction code such as "Mobile number blocked" or "DNC blocked" is then generated by the system and recorded in the call log via Auto-TCL.

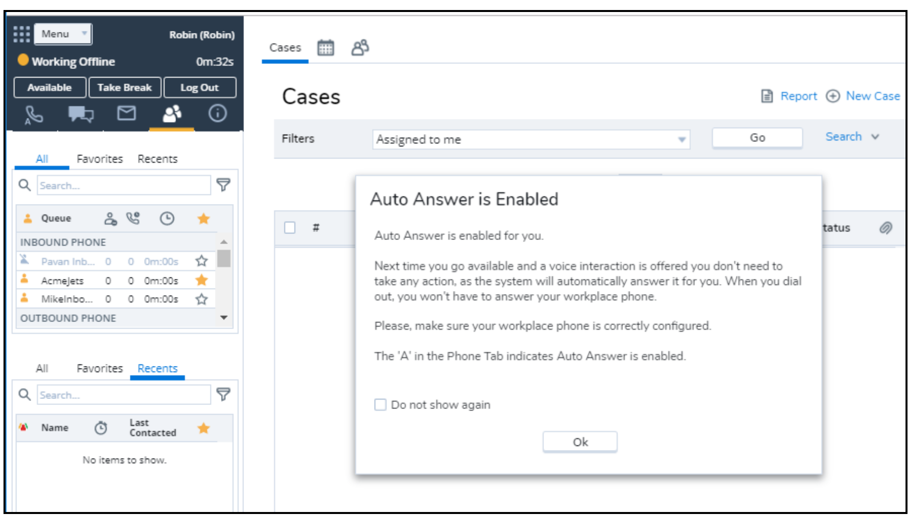
Enable Agents Auto Answering

If your contact center administrator has enabled Auto Answer for an agent, every phone interaction that is offered to an agent is automatically connected eliminating the need to accept it manually. This new configurable option enhances agents efficiency by quickly connecting the calls and reducing the number of clicks an agent has to make. Auto Answer also helps prevent agents from rejecting or missing calls on their workplace phone .

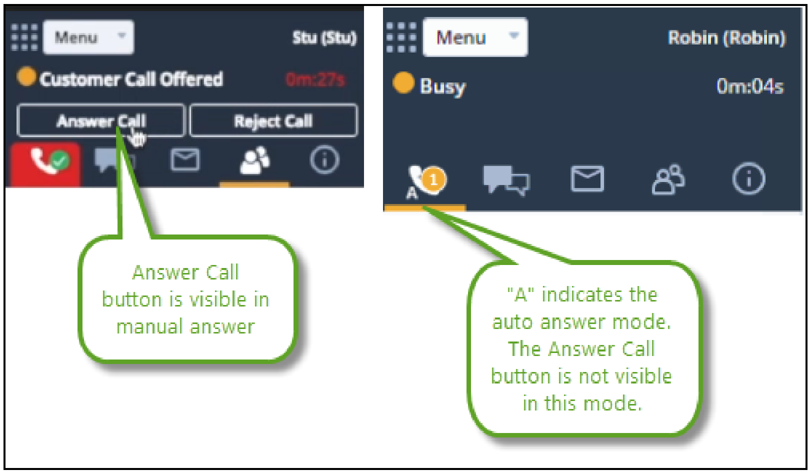
Note: Auto Answer is currently on limited availability. Contact 8x8 Support for more help.

When Auto Answer is enabled for the agent, the agent is notified of their new status as soon as they log in.

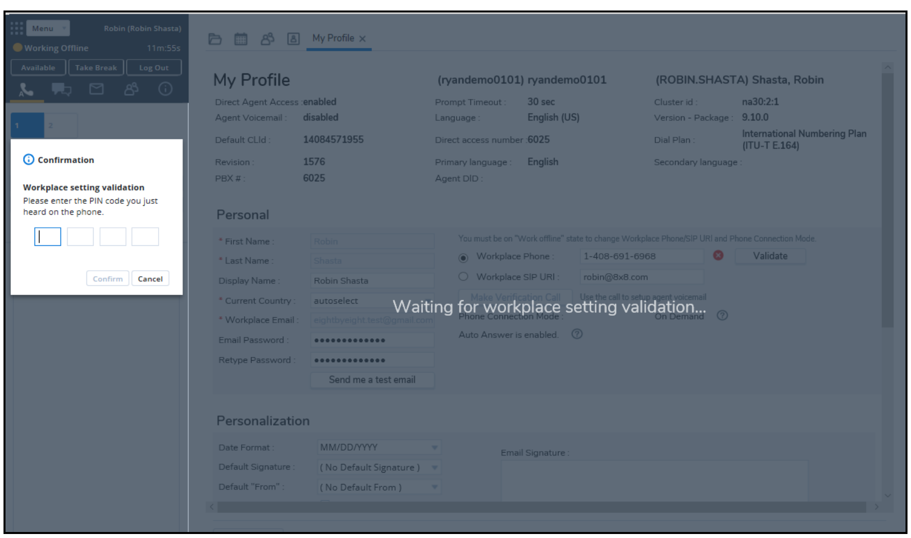
1. Click **Ok** to continue.



When in Auto Answer mode, agents receive an audio prompt to alert them of a call as it connects. The Auto Answer feature is visually indicated with an **A** in the phone tab which persists in all agent states.



2. If you have changed your workplace setting, you receive a verification call. For details, see our topic about workplace setting validation.
3. Answer the call. A four-digit PIN is played to the agent. The PIN code is numeric only and is repeated in the call.
4. Enter the PIN in the confirmation window and click **Confirm**. When confirmed, a message in the call verifies the successful verification. The new phone number is now Resources/Images/9-9/icon-validated.png" class="Inlineimages" />**VALIDATED**.



Note: Validation calls are not auto answered.

Considerations when using Auto Answer:

- The agent’s audio may be connected before any visual notification is made on the screen for the interaction or any screen pop can be enabled.
- Direct Agent Access (DAA) or Direct Agent Routing (DAR) calls are only sent in an Auto Answer mode to an enabled agent if they are on an Available state.
- An Auto Answer agent with a post-processing time set to zero could potentially find themselves with a non-stop succession of calls.
- If a supervisor is in Auto Answer mode, monitoring an agent who is not, the supervisor may be connected first, but the customer will continue to hear queue music or the ring tone until the agent is connected.
- Auto Answer is supported by the Virtual Office desktop app. Support for the Bria softphone will follow for this feature in a later release. If the device is not supported, then the system defaults to the standard manual answer.
- The Auto Answer feature is visually indicated with an **A** in the phone tab which persists in all agent states.

Note: If Auto Answer is enabled, the **Answer Call** button is absent in the user interface when agents are offered calls.

Note: Auto Answer is only supported on line **1** for phone interactions.

Combinations for Connection Mode and Auto Answer Settings

Auto Answer can be combined with the Persistent feature to create an on/off combination of the two features. Auto Answer settings combined with Persistent can be configured at multiple levels depending on the features availability:

Connection	Behavior
Persistent Off, Auto Answer Off	Phone Connection Mode is On Demand and Auto Answer is off, so the agent needs to answer the phone for every phone interaction.
Persistent Off, Auto Answer On	Phone Connection Mode is On Demand and Auto Answer is on, so the agent phone automatically connects, and the interaction is auto answered when offered.

Connection	Behavior
Persistent On, Auto Answer Off	Phone Connection Mode is Persistent, so the agent media path is always connected but for every phone interaction the agent needs to click the Accept button.
Persistent On, Auto Answer On	Phone Connection Mode is Persistent, so the agent media path is always connected, and the interaction is auto answered when offered.

Assign Automatic Transaction Codes (Auto-TCL) to Campaigns

If your contact center administrator has enabled Auto-TCL for your campaign, 8x8 Virtual Contact Center automatically assigns transaction codes to campaign calls when the destination party is not available to answer the call, or the call cannot be completed such as when there is a busy tone or dead line. This also includes identifying calls that are answered by a machine. Auto-TCL works with Answering Machine Detection (AMD) service to identify such calls and automatically disposition them. It then moves onto the next call with minimal agent disruption. This feature allows agents to be more efficient with their time. Auto-TCL feature must be provisioned to the tenant. Administrators can then set it up in Configuration Manager.

When you run a campaign, the campaign dialer begins calling numbers fed from the CRM. When it detects a TCPA-listed phone number, the CCB terminates the call. A transaction code such as "Mobile number blocked" or "DNC blocked" is then generated by the system and recorded in the call log via Auto-TCL.

Note: Auto-TCL supports campaign calls only.

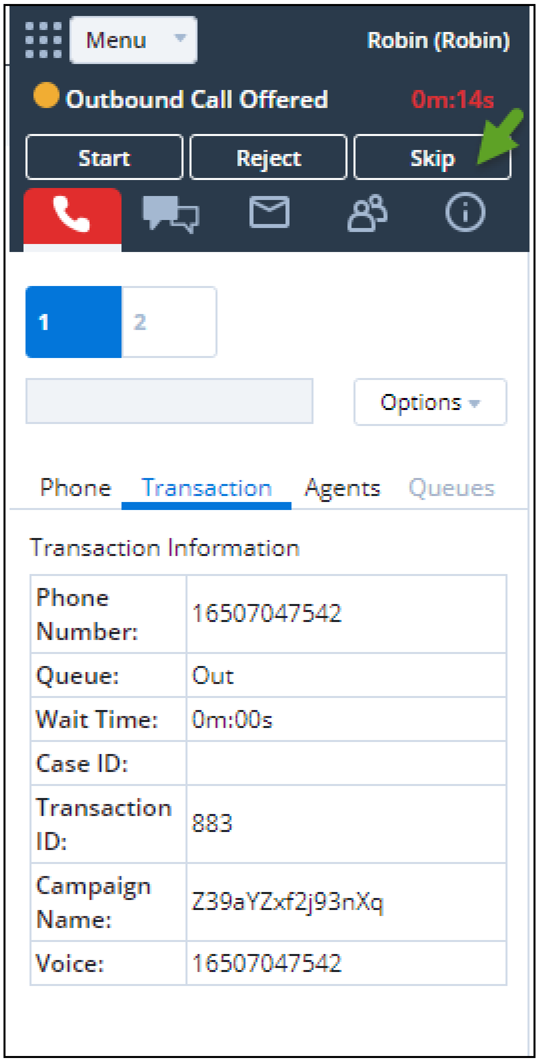
Allow Agents to Skip Campaign Calls While on Auto Answer

If your contact center administrator has enabled the skip campaign option, 8x8 Virtual Contact Center allows agents the option to skip the campaign calls when being offered.

To Skip Campaign calls:

1. Log in to Agent Console.
2. Change your status to **Available**.

3. When a campaign call is offered, click the **Skip** button. The next call will be offered.



Process Voicemail Interactions

For agents assigned to voicemail queues, Agent Console Phone tab enables you to process voicemail interactions as a subset of phone interactions.

Unlike phone interactions, voicemail interactions cannot be transferred or forwarded. The information in this section describes the default voicemail options.

For information about Agent Console phone tools, see Overview of Phone Controls.

Accept Voicemail Interactions

Perform the following actions to accept a new a voicemail interaction. The following procedure assumes that you are assigned to an enabled voicemail queue, and that your status is Available.

To accept a voicemail interaction:

1. In the Control Panel, click **Available**.
   Agent Console offers a voicemail interaction only to an agent assigned to an enabled voicemail queue, and whose agent status is Available.

   Note: The Reject interaction button is disabled if your contact center administrator has not granted the permission. This prevents agents from rejecting the interactions they are offered.

2. When your agent telephone rings, Agent Console flashes the Phone tab and displays Voicemail Offered. Answer your agent phone to accept the interaction.
   Then, Agent Console:

- Plays a recorded message that notifies you the new interaction is a voicemail interaction.
- Tells you to press **1** to send a copy of the voicemail message to your email address as a WAV file attachment.

> **Note:** The only way you can save a voicemail message is to send a copy of the message to your email address. When you disconnect your agent telephone from the voicemail interaction, Agent Console permanently deletes the voicemail message.

- Begins playing the voicemail message.
  Agent Console repeats the voicemail message until you hang up the phone or press **End Call**.

3. After listening to the voicemail message, hang up your agent telephone, or in the Phone tab of the Control Panel, click **End Call**.
   Agent Console permanently deletes the voicemail message. If you did not press **1** to send a copy of the voicemail message to your email address, the message is permanently lost.
4. Click **End Post Processing** to change your status to Available, or click **Work Offline** if you need more time to complete any post processing tasks.

Receive Voicemail Email Notification

The voicemail email notification now provides the transaction ID, allowing you to track the queued voicemails better. An email notification for a voicemail is generated as a result of:

- Voicemail Queue Notification: When a caller leaves a voicemail via a voicemail queue, an email notification is sent to the email address configured for the voicemail queue.
- IVR Settings for Voicemail: A voicemail being sent to an agent from the voicemail queue. The agent requests an email to be sent to the agent.
- Transferring to Agent Voicemail: A voicemail being sent to an agent after the caller calls and leaves a voicemail in the agent’s voice box.

Additionally, you can retrieve the following information from a voicemail notification sent by email:

Tenant name, Cluster ID, Phone queue ID, Voicemail queue ID, Calling name, Interaction GUID of the inbound phone queue, Transaction ID of the inbound phone interaction, Voicemail begin offset, Filename, Agent name, and Voicemail retrieval delay.

Process Chat Interactions

Contact center agents may be assigned to one or more chat queues. Chat queues prioritize and deliver chat interactions to agents whose status is Available, and who are assigned to an enabled queue.

Features

- Provide a means of responding in real time to customer inquiries.
- Process up to six concurrent chats from customers, and an unlimited number of chats with agents.
- Use the customer information in chat to automatically access customer or case records in the Local CRM.
- Agents and customers can request or allow Co-browsing sessions via chat.
- Provide multilingual support for chat.
- Ability to use an automatic translation tool.
- Access auto log and screen pop for chats.

Agent Console chat controls allow you to:

- Process chat interactions.
- Handle multiple chats.
- Handle multilingual chats.
- Handle Social Interaction.
- Transfer customer chats to a different queue.
- Save chat logs.
- Insert FAQ responses into chat interactions.

Overview of Chat Interactions

In Agent Console, chat interactions provide a means of responding in real time to customer inquiries.

Depending on the configuration of your contact center, the contact center's chat access page can be configured to either allow or require a customer to supply an account number, case ID, or other numerical information before beginning the chat interaction. When you accept the new chat session, Agent Console uses the information to automatically access customer or case records in the Local CRM.

If the customer has not supplied any identifying information before beginning the chat, you can ask the customer via chat window the information you need to create a new customer or case record.

Note: As an agent you can process up to six concurrent chats from customers, and an unlimited number of chats with agents.

Co-Browsing Support for Chat

Virtual Contact Center offers Co-browsing via chat. Agents and customers can request or allow Co-browsing sessions via chat. For details, see how we offer remote customer assistance via chat.

Multilingual Support for Chat

Virtual Contact Center offers multilingual support for chat. With this feature, customers can choose to chat in any of the supported languages. Agents can handle customer chats in any of the languages supported, or use an automatic translation tool. Each Virtual Contact Center agent is associated with one primary and one or more secondary languages of fluency.

- If the chat request is in one of these languages, agents can chat in the requested language.
- If the chat request is not in their primary or secondary language, agents can use the provided automatic translation tool.

With multilingual support for chat:

- Administrators can provide language choice in embedded chat.
- Customers can choose to chat in a language of their choice.
- Agents can handle customer chats in any of the supported languages.

Supported Languages

Virtual Contact Center offers chat translation support for English, Russian, German, Japanese, Spanish, French, Chinese, Portuguese, Italian, or Polish.

To learn how to handle multilingual chat requests, refer to Handle Multilingual Chats.

Inbound Chat Work Flow

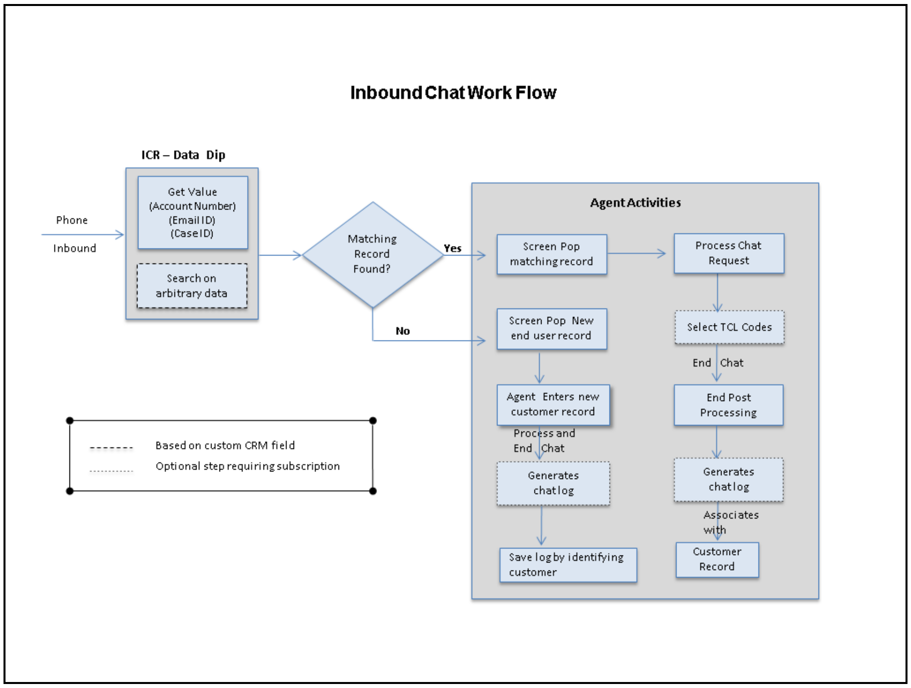
Chat interactions flowing into Virtual Contact Center stay in a chat queue until an agent is available. When an agent's status is Available, the longest waiting chat in the queue is offered to the agent. Virtual Contact Center searches the Local CRM database for existing customer records based on account number, case number, or any arbitrary data passed during the interaction. If the chat request is from an existing customer, the relevant customer or case record is presented to the agent through screen pop. In the absence of a matching record, a new customer record entry pops up. A screen pop occurs either before or after agent accepts an interaction, based on the screen pop settings configured by contact center administrator. The agent processes the chat, and may select transaction codes to indicate chat disposition. Selecting transaction codes may be optional or mandatory based on the settings. On ending the chat, the agent gets post-processing time for a final wrap-up before the chat terminates. If codes are mandatory, the interaction stays in Post Processing mode until codes are selected.

At the termination of the chat, Virtual Contact Center may create an auto call log. If the administrator has configured auto logs, one of the following auto log events occurs:

- screen pop auto log in view mode
- screen pop auto log in edit mode
- No screen pop

Note: Auto log of interactions requires administrator configuration.

The sequence of events in an inbound chat flow may be represented by the following chat flow diagram:



Process Chat Interactions

Virtual Contact Center directs chat requests to agents via a chat queue. An agent must be in Available state to receive these incoming requests. When an incoming chat is offered to an agent, the Chat tab blinks, indicating an incoming request. The agent can accept, or if permitted by administrators, reject the chat request. On accepting, the agent's status changes to Busy. On rejecting the request, the agent's status changes to On Break.

Pre-requisites

To receive chat interactions, agents must:

- be in Available state.
- be assigned to an enabled chat queue.

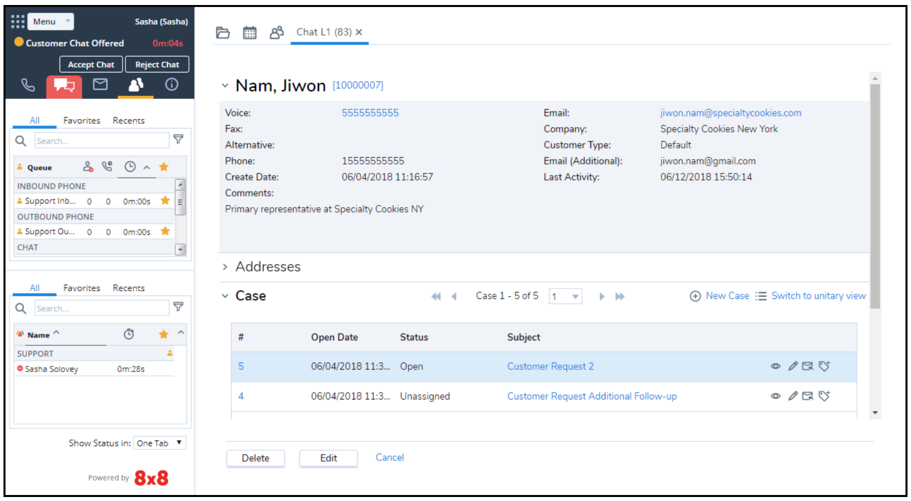
Note: You can view or edit your queue assignments in the Agent Profile. For details, refer to View Your Assigned Queues.

To process a new chat interaction:

1. Change your status to **Available**.
2. The Chat tab in the Control Panel blinks red indicating an incoming chat request.

Note: The Reject interaction button is disabled if your contact center administrator has not granted the permission. This prevents agents from rejecting the interactions they are offered.

3. If the incoming chat is from an existing customer, the customer or case record pops for preview.

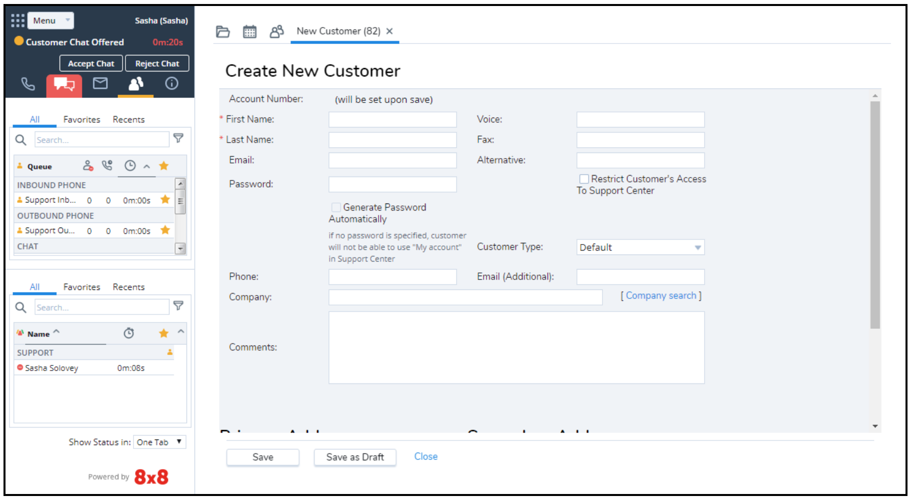


Note: If the customer supplied account or case information when initiating the chat, Agent Console accesses the appropriate record and presents the record for preview. The screen pop behavior may vary based on the settings.

Note: If the screen pop fails to open, clean up your browser cache and cookies and log back in.

If the request is from a new customer:

a. If the request is from a new customer, a new customer record entry form pops up.



b. Enter the details of the new customer, and save the customer record.

c. After processing the chat, click **End Chat**.

d. If chat log is enabled, a chat log is created and pops in edit mode.

e. **Save** the log by selecting the newly-created customer from the list.

The log is saved as a case.

4. Preview the record details, and click **Accept Chat**.

> **Note:** If you reject the chat, or failed to accept it before the acceptance interval lapses, your status is changed to On Break.

5. Initiate the chat conversation with the customer by typing in the chat window.

> **Note:**The chat window capacity is 5000 characters to allow agents to communicate large bodies of text, such as FAQs, via the chat window. Chat interactions via Support Center are limited to 500 characters on the customer side.

6. Click **Send**.
Your chat entry is posted on the customer's chat window. You are also notified of typing in progress on either end.

7. Optionally, insert information from FAQs. For details, refer to Insert FAQ Responses into Chat Interactions.
8. Optionally, select transaction codes to indicate chat disposition.
9. To end the conversation, click **End Chat**.
   The chat conversation ends. Your status changes to Post Processing to wrap up.
10. You can end post processing manually, or wait until the post processing timeout occurs.
11. At the termination of the chat, a chat log may pop up. The chat log opens in view mode or edit mode based on the settings. Auto log occurs only if the administrator has configured it.

Notes:
- A chat log opens in view mode if the chat request is from an existing customer. The log case is associated with that customer record automatically.
- A chat log opens in edit mode if the chat request is from a new customer. While saving the log, you are prompted to select a customer from the existing list.

12. Edit the chat log case as desired, and save or save as a draft.

Enhanced Control on Agent Status

We have offered agents the flexibility to stop new chat interactions and wrap up the chat sessions in progress while handling multi-chat. With this enhancement, agents winding up for the day can block new chat interactions being offered to them and manage the workload better. In the Control Panel, agents are offered Stop New and Resume buttons.

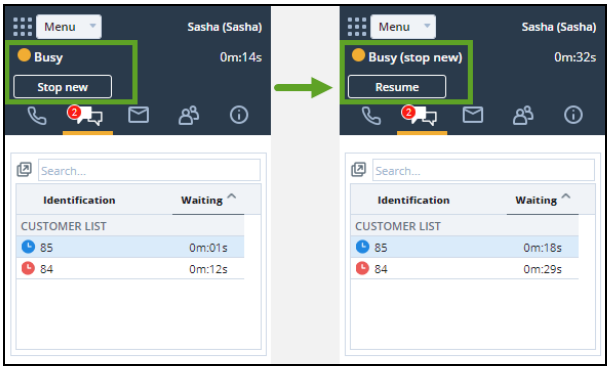
- Clicking **Stop New** blocks incoming chat requests.
- Clicking **Resume** allows incoming chat requests.

Features

- Stop New is limited to queued chat interactions only.
- The Stop New button is only available in busy state during multi-chat.
- Monitoring shows when agent status changes to Busy (stop new).

To stop new interactions:

1. While you are processing chat interactions, your status automatically changes to Busy.
2. Click **Stop New** from the Agent Console Control Panel.
   Your status changes to Busy (stop new). While in this state, you are not offered any new chats.



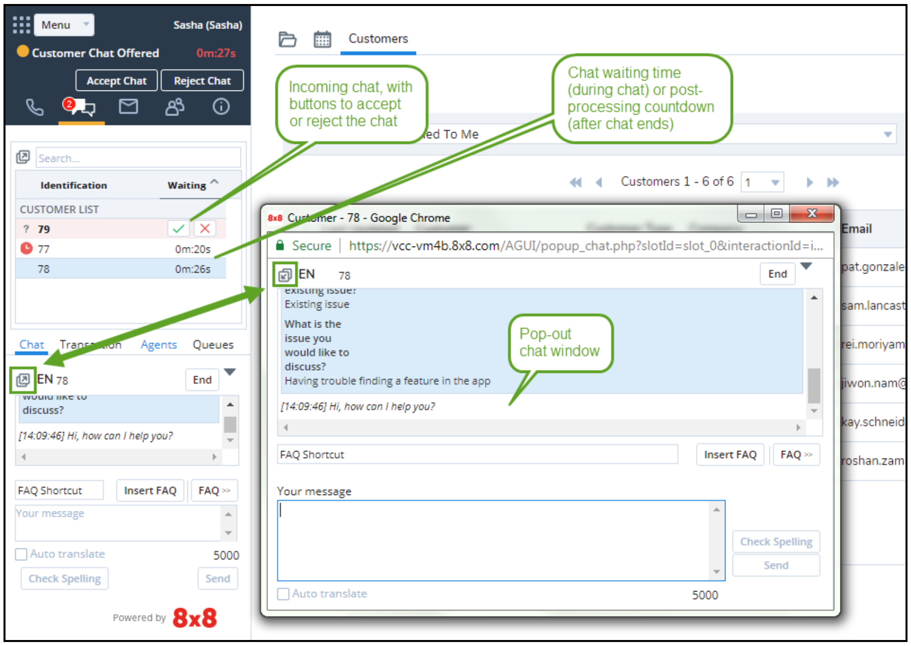
3. Wrap up the existing chat sessions.
   On wrapping up the last chat session, your status changes to Post Processing, and then to Work Offline, instead of being offered a new chat.

To resume new interactions:

1. While in Busy (stop new) status, new chat requests are blocked.
   If you wish to resume, click **Resume** from the Agent Console's Control Panel.
2. Any queued chat request is offered to you immediately.
   Begin processing chat interactions.

Overview of Multi-Chat

Your contact center administrator can configure each agent to handle up to six chats with customers, and an unlimited number of chats with other agents of the same tenant. These settings determine your multi-chat capability.



Features

- Manages concurrent chats with multiple customers and agents.
- The chat list of customers and agents provides easy access to chats in progress.
- The chat list is sorted primarily based on waiting time. The longest-waiting chat is placed on top of the list.
- Icons differentiate customer-to-agent chat from agent-to-agent chats.
- Icons highlight unread chat messages.
- Icons indicate customers waiting for an agent's response.
- Icons send alerts if customers are waiting longer than the SLA.
- A pop-out chat window improves handling of multiple chats.
- Relevant customer records pop up when accepting chats.
- Customer information such as name, email, and transaction ID display on the title bar of the popped-out chat window.
- Is able to sort the chat list by Identification: nickname, first name, last name, email, and transaction ID. By default, the chat list is sorted by waiting time.
- Tracks messages from new customers via Transaction ID.
- Searches chat list by name.

Handle Multiple Chats

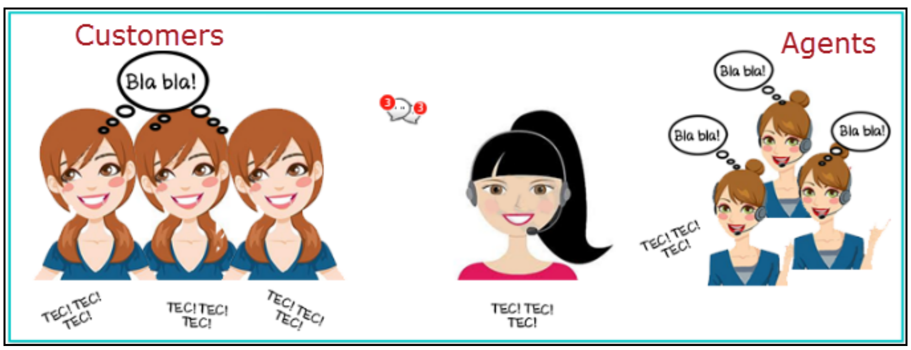
You can handle multiple concurrent chats with customers and agents. Your status must be Available to accept the first chat. After accepting the first chat, your status changes to Busy. Based on the number of interactions allowed, chat requests continue to be offered to the agent until they reach the maximum allowed customer chats. When a new chat request is offered, the chat tab indicates an incoming request by blinking if the Chat tab is not in focus.

At the same time, the customer receives a message to wait until an agent becomes available. You can accept or reject the chat at this time. On accepting a chat, the system looks to see if the chat is with an existing customer. If a matching CRM record is found, the customer detail record is presented to the agent in a separate tab. In the absence of a matching record, a new customer record opens.

The agent can now chat with the customer and be open for handling more chat requests.

Multiple chats can be:

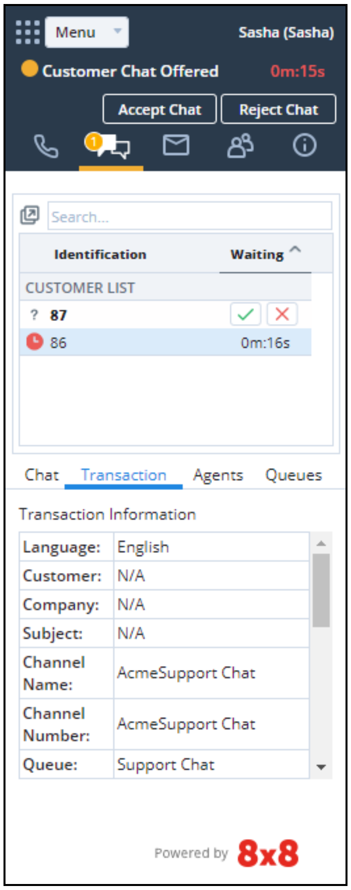
- Customer-to-Agent Chat
- Agent-to-Agent Chat



Chat List

To keep track of multiple chats in progress, a chat list is maintained for customer chats and agent chats. When a new chat is offered to an agent, the chat list is updated to show this new entry at the top of the appropriate group. A question mark ( ) appears in the new message column next to the customer name. Icons to accept ( ) and reject ( )

offered chats appear in the same row.



The chat session starts as soon as you accept the chat. A customer chat is displayed in the Customer List while an agent chat is displayed in the Agent List. If the agent selects a chat, the chat information is shown in the chat panel with the Transaction tab selected. If the agent accepts the chat, the chat continues as expected.

Customer-to-Agent Chat

As an agent, you can chat with up to six customers. You need to be part of a queue to receive chats coming to that queue. When a customer chat arrives in the queue, it is offered to the available agent who has been waiting for the longest time.

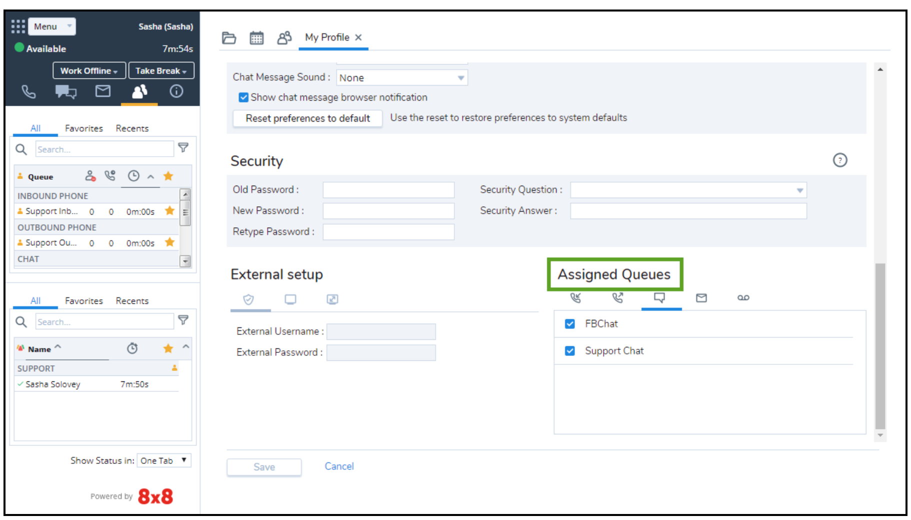
Features

- Agents can chat with up to six customers.
- Agents can accept or reject incoming chats.
- Chat is offered to the available agent who has been waiting in the queue for the longest time.
- Agents can access the customer nickname, last name, first name, and email ID in the pop-out chat window's title bar.
- Remote customer assistance is offered via chat using the Co-browsing capability.

Before you start:

First, you need to check if you are part of a chat queue to receive their chats:

1. Log in to Agent Console.
2. Click the **Available** state.
3. Click **Profile** in the main menu.
4. In My Profile page, go to **Queue Assignment** and open the **Chat** tab. Check if you are assigned to the right chat queue.



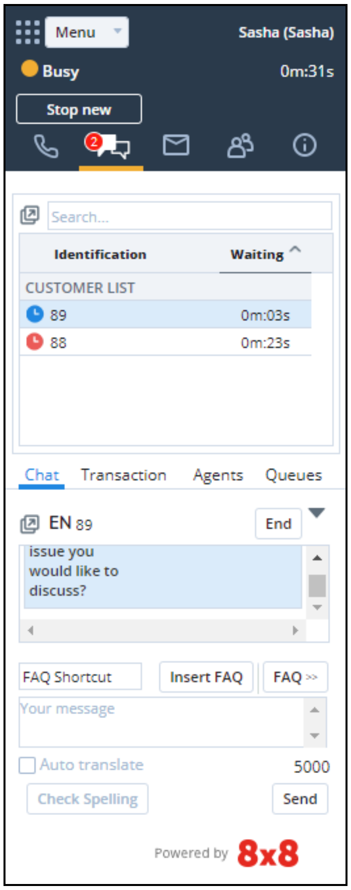
To process a customer chat:

1. In Agent Console, when a new chat is offered, click to go to the chat window.
2. Click to accept the chat. The tab changes to , indicating the number of active chats waiting.
3. If it is an existing customer, the chat list gets updated with the customer information. The customer's detailed record also opens in a new tab.
4. Type your message in the chat window and click **Send**.

> **Note:** Click to open a chat window. The title bar in the pop-out chat window shows the customer nickname, last name, first name, and email ID. If it is a new customer, it shows the Transaction ID.

5. The blue status icons indicates if a customer has sent you a message and waiting for your response. If the customer waiting time exceeds SLA, the status icon turns red in the chat list. For details, refer to Multi-Chat Table.

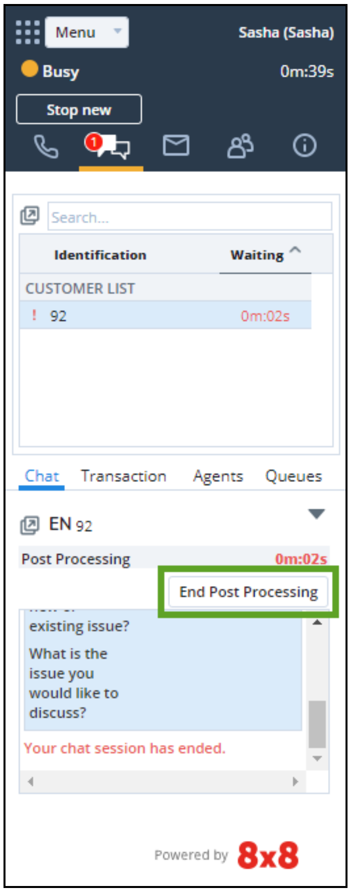
6. To accept a second incoming chat, click **Accept**. The customer chat list gets updated automatically.



7. Open the chat window as desired. When you are done chatting, terminate the chat session by clicking **End**.

8. To save the chat transcript, click in the chat window, and select **Save** from the menu.

9. Click **End Post Processing** to complete the session.



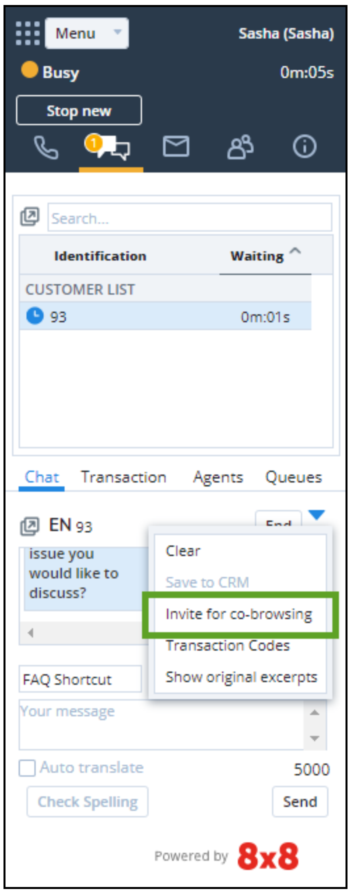
Note: The customer name remains in the chat list while the post processing window is open. Closing the pop-out chat window closes the window, but does not end the chat.

Offer Remote Customer Assistance Via Chat

8x8 offers remote customer assistance via chat using the Co-browsing capability. Co-browsing is available by subscription only and must be enabled by your administrator in Configuration Manager. Once the administrator enables Co-browsing for chat, agents can invite customers for Co-browsing during a chat session in Agent Console. With Co-browsing, agents can quickly help customers find the information they are looking for, or clarify any questions they may have.

To start and stop Co-browsing:

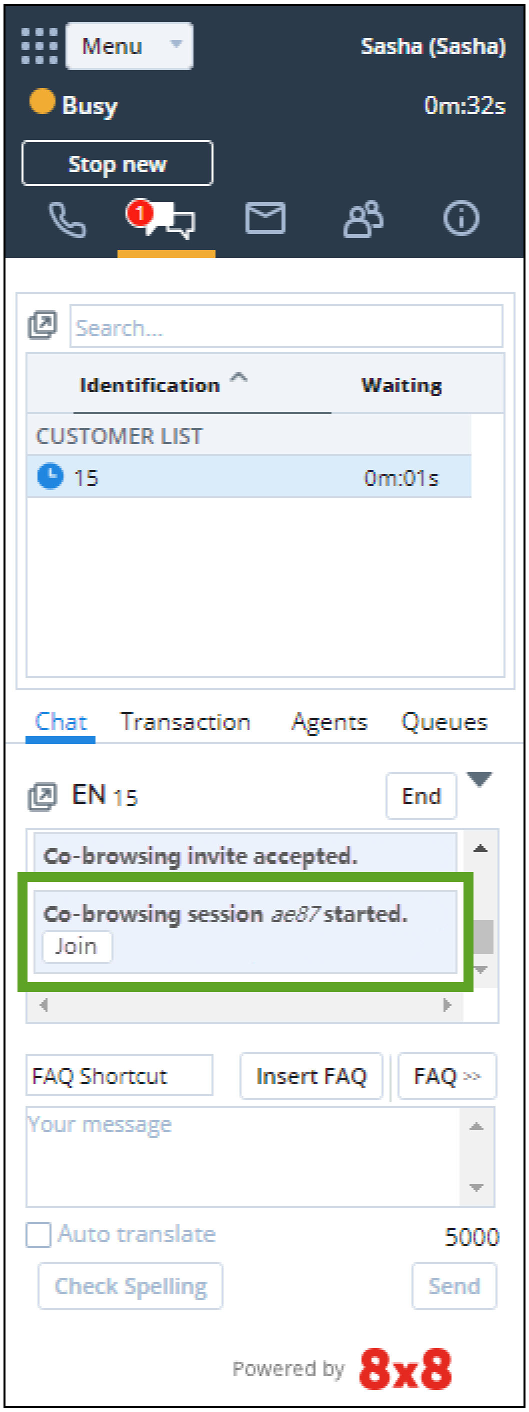
1. Log in to Agent Console.
2. Accept the incoming chat interaction.
3. Open the chat interaction menu, and select **Invite for Co-browsing**.



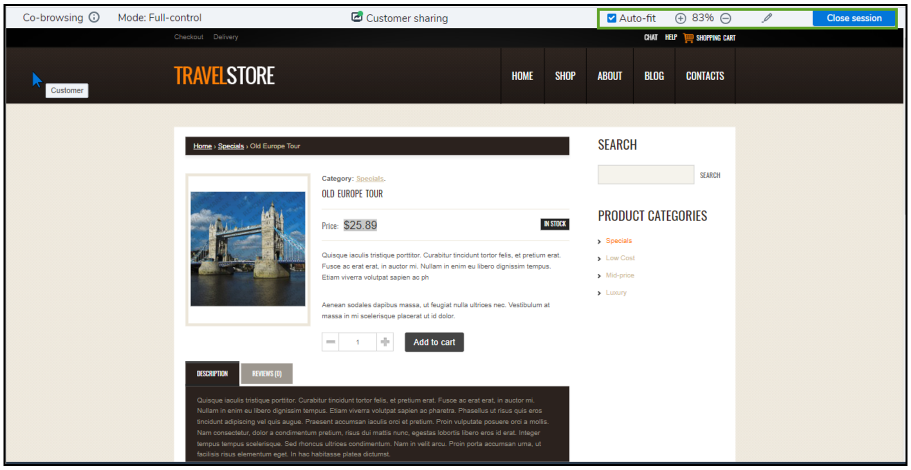
The customer is prompted to accept the invitation for Co-browsing, and clicks **Yes, Start Sharing**.

The agent is notified when the customer accepts the invite.

4. Click **Join** to continue.



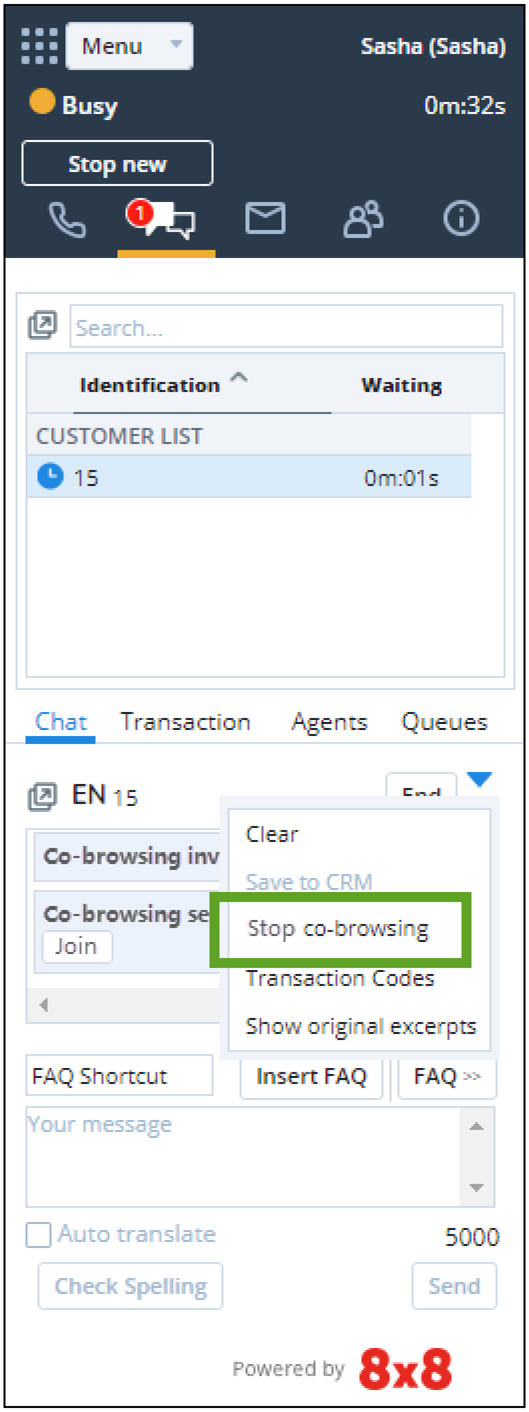
You can see the customer's screen now.



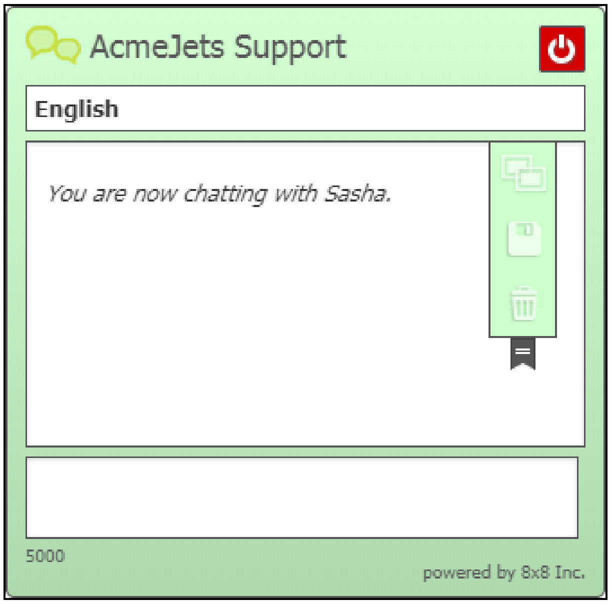
5. Click **Auto-fit** on the top header bar to automatically scale the view to fit your available space.
   You can manually increment or decrement the zoom level to your desired value.
6. Toggle on **highlight** on the top header bar.
   You can mark specific components in the page. The marks are visible for both agents and customers for a few minutes or until the agent toggles it off. It also disappears when the customer moves away from the page.

Note: During a Co-browsing session, if the customer is filling a form and entering sensitive information such as SSN, it is hidden from the agent by showing **** instead of the real letters and numbers.

7. Click **Stop Co-browsing** when the session ends.



The customer can start or stop a Co-browsing session by clicking in the **Chat** window.



Agent-to-Agent Chat

Agents can have an unlimited number of chats with agents of the same functional group, such as sales or support, in the same tenant. You can chat with other agents in your group to consult, seek advice, or inform of a customer call transfer. You can initiate an agent-to-agent chat via a menu option in the Agent Status tab. The Agent Status tab can be accessed via the Status tab in the Control Panel.

Features

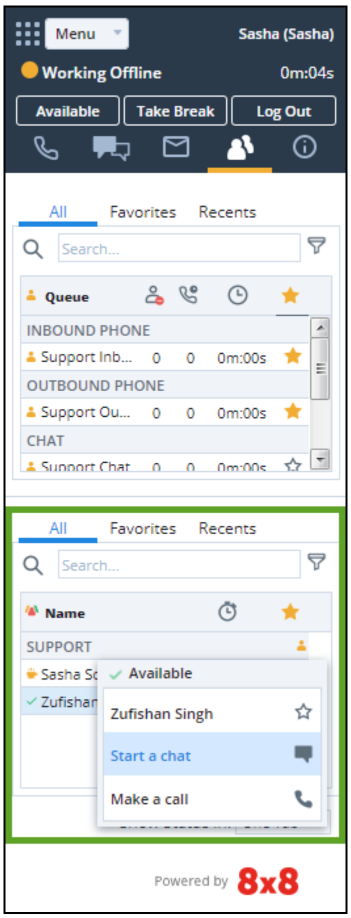
- Ability to have an unlimited number of chats with agents of the same functional group in the same tenant.
- Agents can chat with other agents in a group to consult, seek advice, or inform of a customer call transfer.
- Easy-to-remember status icons shows active customer chats, status of the agent and customer responses, and if their response is delayed.
- Receive chats automatically; there is no accept or reject button for agent-to-agent chats.

To initiate a chat with an agent:

1. In the Control Panel, go to the **Status > Agent Status** tab from the Two Tabs view.
2. find the agent you wish to chat with from the agent list.
   The agent list can also be accessed from **Phone > Agents** or **Chat > Agents**.

> **Note:** You need to be part of the same functional group to be able to see and chat with another agent. Supervisors, however, can see and chat with the agents of other groups.

3. Click on the agent's name and select **Start a chat** from the menu. The chat window opens.



4. Type your message, and click **Send** or press **Enter**.

> **Note:** Status icons indicate pending agent chat messages. These icons disappear when you respond to the message. For a complete description of the status icons, refer to the Multi-Chat Table.

5. Click **End** to finish a chat session.

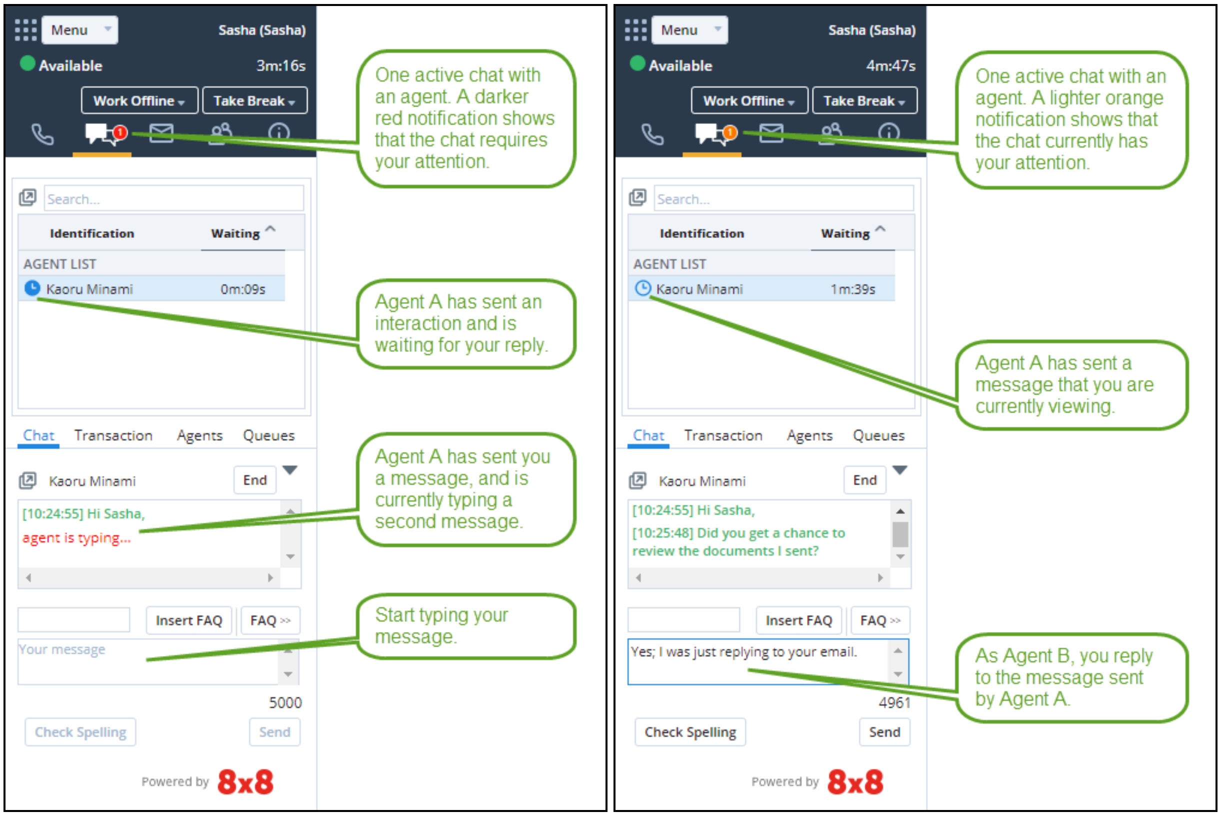
> **Note:** There is no button to accept or reject agent-to-agent chat. The chats are received automatically.

As Agent B, the moment you receive a chat request from Agent A, the number on the chat tab starts blinking red as shown in . In addition,  indicates that a chat requires your response. Note that agent A appears in the **Agent List**.

To process an incoming chat from an agent:

1. In Agent Console, click the Chat tab.
2. Start typing your response in the **Your Message** text box.

3. Click **Send**.



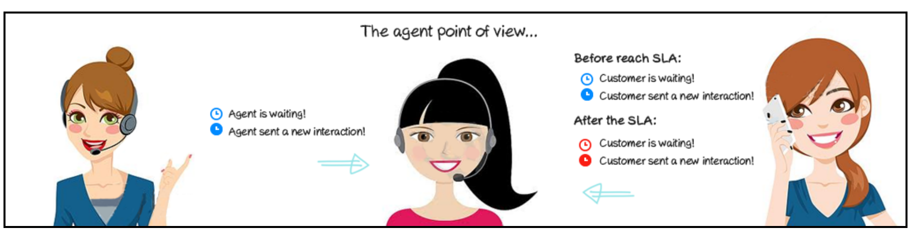
Multi-Chat Table

The following table shows and describes the status icons found in multi-chat:

Icon	Description
	A chat has arrived, and is waiting for the agent to accept.
	A chat is offered to the agent, and is waiting to be accepted or rejected.
	Accept the offered chat.

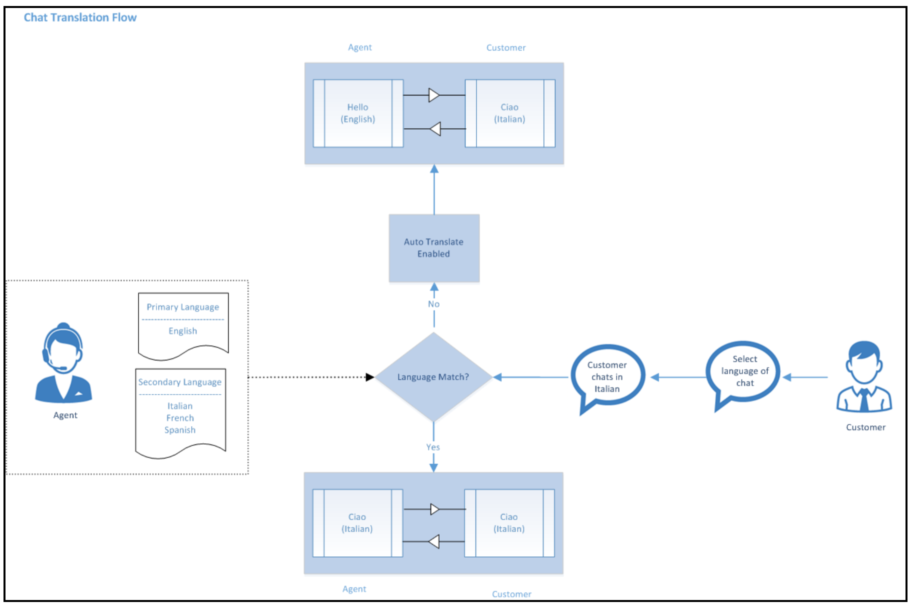
Icon	Description
×	Reject the offered chat.
	There is one active customer chat for the agent. Orange indicates that the agent has sent their response to the customer.
	There is one active customer chat for the agent, pending the agent’s response. Red indicates that the response is past SLA.
	Indicates that the customer or second agent has sent an interaction, and is waiting for the agent’s response.
	Indicates that the agent has read the message, but has not responded yet.  **Note:** Once the agent responds to the chat message, the timer icon disappears.
	Indicates that the customer has sent an interaction and is waiting for longer than the targeted service level. There is no such alert for an agent.
	Indicates that the agent has read a message that was pending longer than 30 seconds.
	There is one active agent chat for the agent. Orange indicates that the agent has responded to the other agent, and not yet reached the targeted service level.
	There is one active agent chat for the agent, pending the agent's response. Red indicates that more than 30 seconds have passed since the agent last responded to the other agent.

The following diagram shows multi-chat status icons from an agent's point of view:



Handle Multilingual Chats

As an agent, you are assigned with a primary language and one or more languages of fluency. If the chat request is not in any one of these languages, you can use the automatic translation tool to process the request. The tool translates chat conversations between you and the customers, offering the flexibility to communicate in a language of fluency. Virtual Contact Center offers chat translation support for English, Russian, German, Japanese, Spanish, French, Chinese, Portuguese, Italian, and Polish.

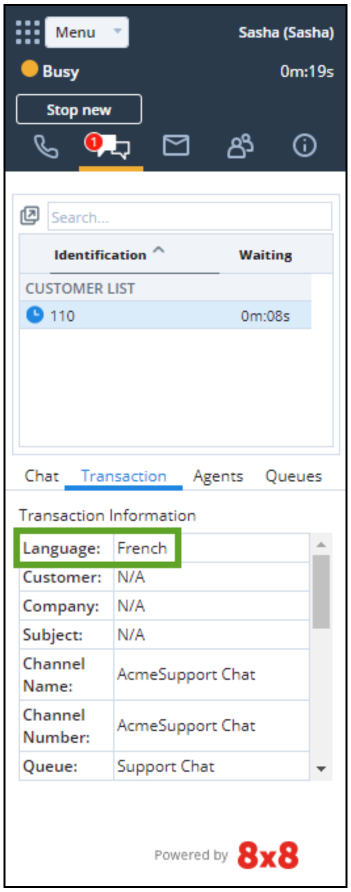


The multilingual chat flow can be represented as follows:

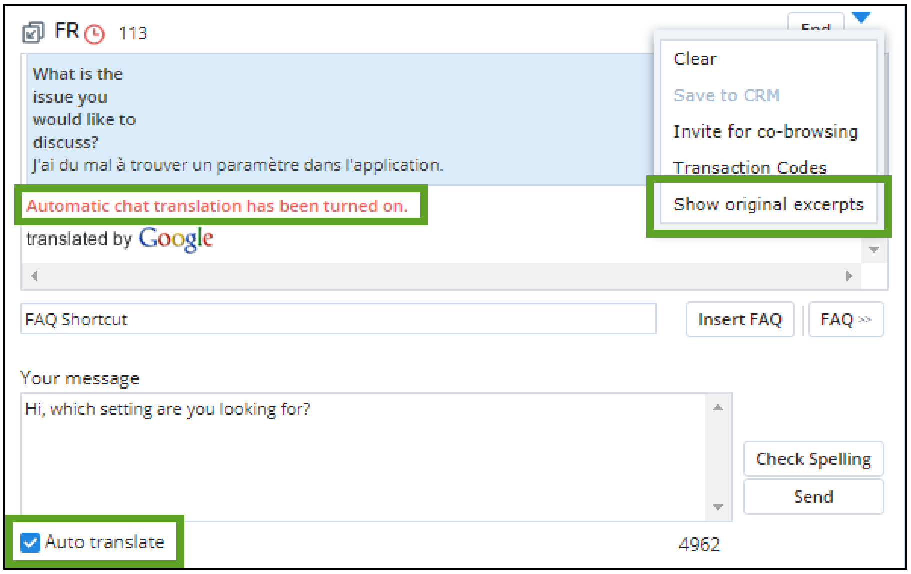
1. A customer visiting a website initiates a chat by clicking the chat button.
2. A pre-chat form is presented to the customer to indicate language choice.

3. The customer fills in the form, selects a language to chat in, and submits the chat request.
4. The request enters the chat queue in Virtual Contact Center, and is offered to an agent.

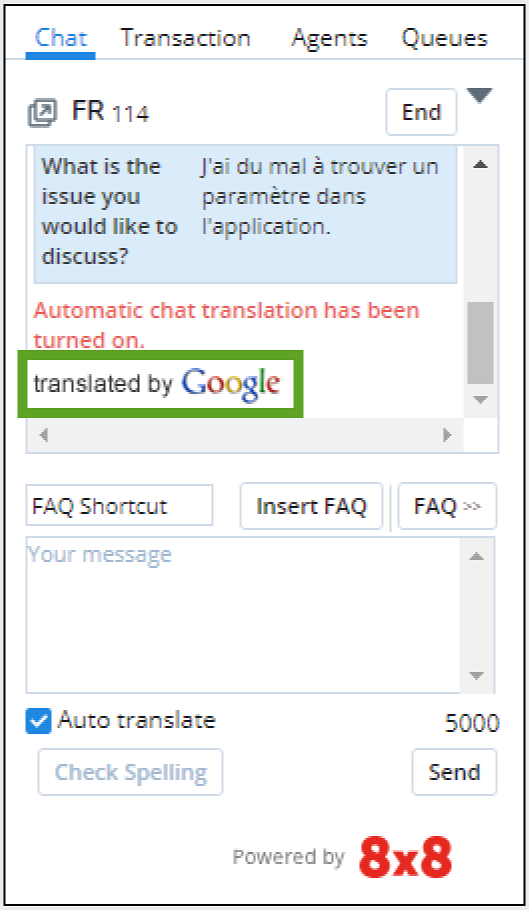
5. On receiving a chat, the Control Panel indicates the language of choice for the chat.



6. On accepting the chat, agents can process the chat using their language of fluency, or use the automatic translation tool. You can choose to hide the original language by selecting **Hide original excerpts** in the list.



Note: Automatic translation is available only in the absence of language match or a secondary language match. The Google translation logo then shows under the chat window in the Control Panel. The logo appears only the first time during an interaction. On the chat log, the Google Translation appears as a single line without the logo.



In the case of a primary language match, automatic translation is disabled.

7. By using the translation tool, messages from the customer are translated to the agent's primary language and vice-versa.

Handle Social Interactions

Use Facebook and Twitter messaging to service customers directly and increase customer satisfaction with Virtual Contact Center Social Integration. By unifying the agent experience, 8x8 Social allows users to channel their messages from social media into Virtual Contact Center. Customers can contact the businesses and receive support from within their social platform.

Agents handle social requests similar to handling the regular chat requests. They are offered chats when they are in Available status. They will then follow the steps below:

- Accept a chat interaction received via a social channel.
- View the screen pop for existing users in the Local CRM (The screen pop may trigger when the chat is offered).
- For new customers, the system creates a new customer record automatically.
- Interact with the customer, save the transcript to the CRM and end the chat. The chat transcript is saved as a closed case in the Local CRM.
- Access the chat transcript in the Local CRM.

Prerequisites

To receive chat interactions, agents must:

- Be assigned to an enabled chat queue
- Be in Available state

Accepting a Chat

1. Change your status to Available.
   The Chat tab in the Control Panel blinks red indicating an incoming chat request.

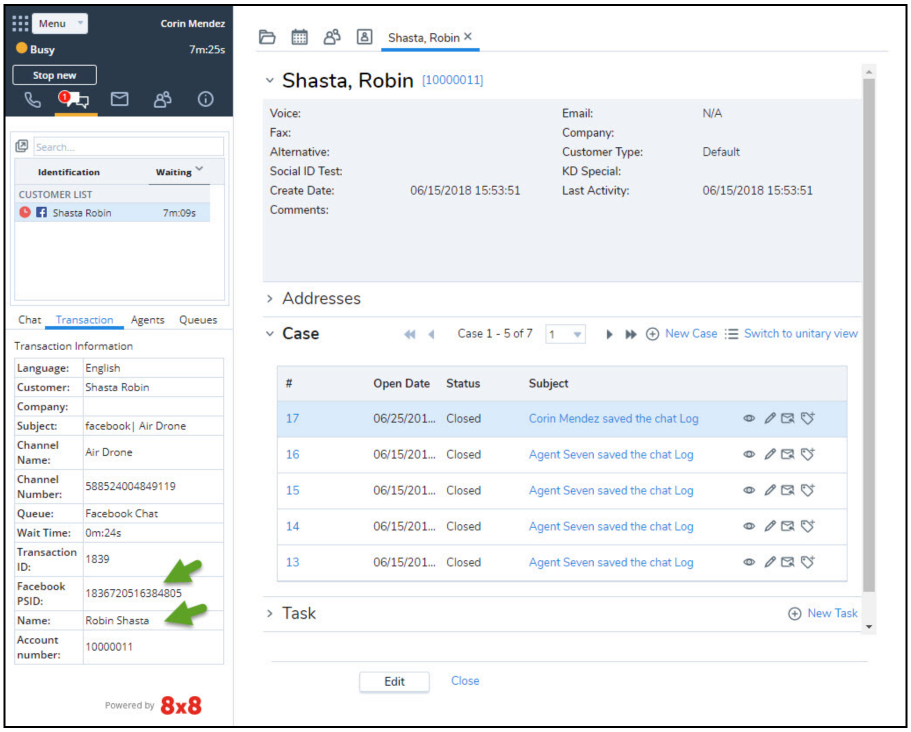
Note: The Reject interaction button is disabled if your contact center administrator has not granted the permission. This prevents agents from rejecting the interactions they are offered.

2. If the incoming chat is from an existing customer, the customer or case record pops for preview.
3. Preview the record details, and click **Accept Chat**.

Note: If you reject the chat, or failed to accept it before the acceptance interval lapses, your status is changed to **On Break**.

4. Initiate the chat conversation with the customer by typing in the chat window. Click **Send**.
   Your chat entry is posted on the customer's messenger window displayed on the social media page used to initiate the chat.

5. Notice the name and Social ID of the customer are displayed to agents in the transaction panel.



6. Optionally, insert information from FAQs. For details, learn how to Insert FAQ Responses into chat Interactions.
7. Optionally, select transaction codes to indicate chat disposition.
   Once you wrap up the chat, click the menu button just above the chat window to bring up the menu. Select **Save to CRM** to save the chat transcript as a closed case. It is automatically associated to the customer record that popped earlier.

Note: You can save the transcript after ending the chat. It creates an independent open case. You need to manually assign it to the desired customer and close the case.

8. To end the conversation, click **End Chat**.
   Your status changes to Post Processing to wrap up. You can end post processing manually, or wait until the post processing timeout occurs.
9. After ending the chat, if you haven't already saved the chat transcript, you can save it. It creates a new independent case which needs to assigned to the desired customer record.
10. Edit the chat log case as desired and save.

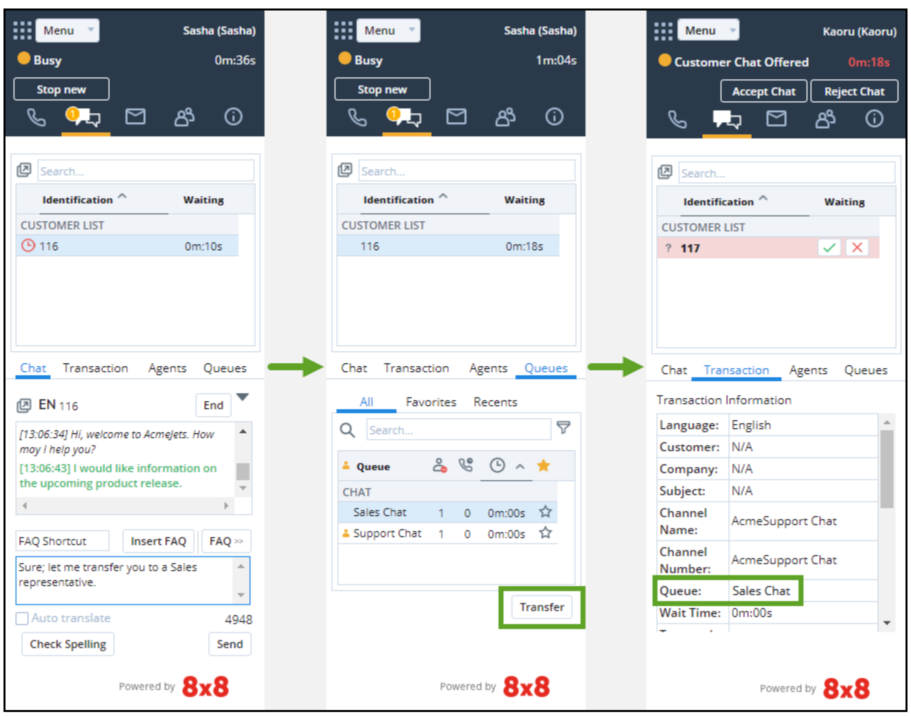
    If the chat request is from a new customer, a new customer record entry in the local CRM pops up. Enter the details of the new customer, and save the customer record. Supervisors can review all chat interactions in the playback section of the Monitoring tool.

Transfer Customer Chats to a Different Queue

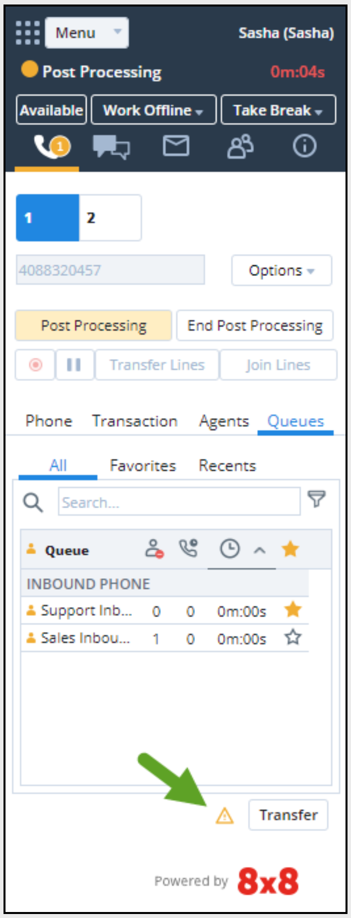
If you wish to transfer an ongoing chat to another queue, you can transfer it in just a few clicks. During a chat, Agent Console gives you the visibility to other chat queues, whether you are part of them or not. Simply select a queue, and click . The chat terminates at your end, and transfers to an agent available in the other queue.

To transfer a live chat:

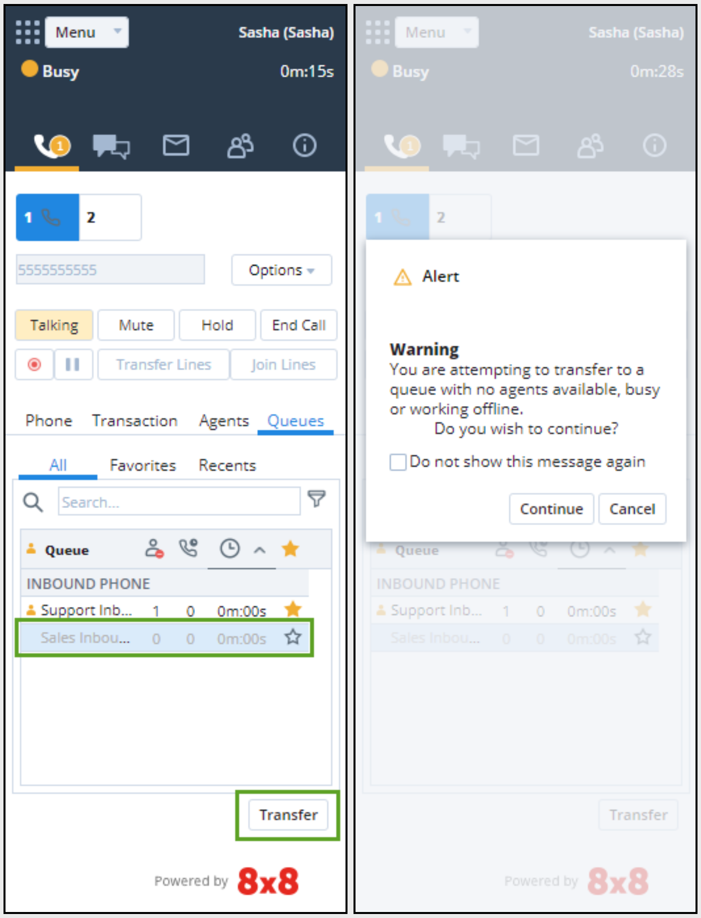
1. Inform the customer about the transfer.
2. Click the **Queues** tab in the Control Panel. The Queues tab lists the chat queues available to accept the transferred interaction.
3. Select the queue you want to transfer to and click .



Note: Agents may experience some delay in accessing the entire list of queues whether or not they are part of them. An exclamation symbol next to the Transfer button indicates the partial loading of the queues. Depending on the number of queues and their sizes, it may take some time for the entire list to load.



Note: If you wish to transfer to an unattended queue, you receive a warning about the non-availability of agents, or you may be blocked from transferring. You can disable the warning message by selecting **Do not show this message again** only if your Virtual Contact Center administrator has given you the right permission. Disabling the warning message prevents you from receiving this message again. Click **Continue** to transfer the interaction.



The chat is transferred to the queue instantly, and offered to the first available agent on the queue.

Save Chat Logs

You may need to refer to your conversation with a customer after you end a chat session. Agent Console gives you the option to save your chat conversations. At the end of a chat session, you can save the chat transcription as a chat log. If the chat is from an existing customer, the chat log is automatically associated with the customer record as a new case or follow-up.

To save a chat transcription:

1. Click ▾ on either the **Chat** window or the chat **Popout** window.
2. Select **Save to CRM** from the menu. A new case is generated for new customers.

> **Note:** For existing customers, the chat transcript is saved as a follow-up case.

3. Select **Transaction Codes**.
   Transaction Codes indicate the outcome of an interaction, and can be optional or enforced depending on the company's policy.
4. Click **End** to end the chat.
5. Click **End processing** to complete the session.

> **Note:** If transaction codes are mandatory, you cannot end Post Processing until you select a code.

Insert FAQ Responses and Rich Media into Chat Interactions

In 8x8 Virtual Contact Center, if your contact center maintains an FAQ knowledge base, you can extract relevant data from the knowledge base and insert these FAQ responses in a live chat session to assist customers. Using these FAQ responses minimizes agents time in finding the right information, and maintains consistent delivery of information.

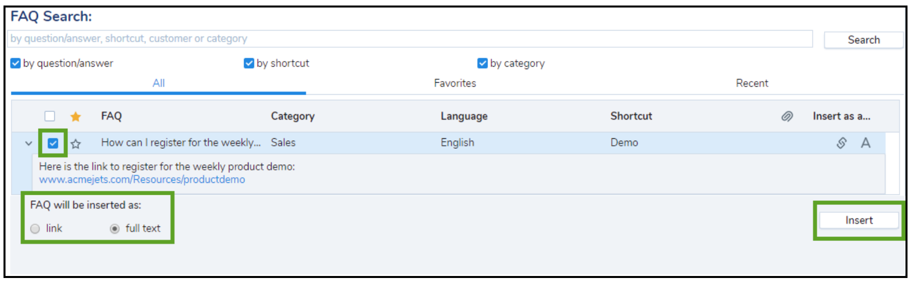
During a chat session, you can refer to the FAQs by shortcuts or by going to the FAQ knowledge base. Referring to shortcuts requires prior definition of shortcuts while creating an FAQ. With out new enhancement, the chat editor in Agent Console allows you to insert rich media FAQs directly into the messages and share with customers during an interaction. Alternatively, you can insert them as a link to HTML content. The chat editor supports regular text formatting, images, and links.

To insert an FAQ response during a live chat session:

1. During a live chat, click **FAQ** above the chat window to open the FAQ window. You can search for and select an FAQ from the list. You cannot expand or view each FAQ.

Note: If permitted by the tenant administrator, you can view, add, delete, or edit FAQs by going to the main menu and selecting **Help > FAQ**.

2. Select an FAQ from the list and click **Insert**.
   You can insert as a **link** or **full text**.



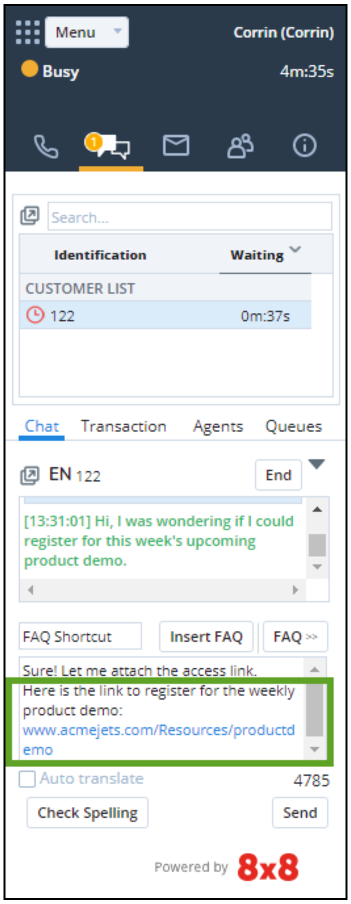
3. Click **Send** to communicate this information to the customer participating in the chat.

To insert an FAQ shortcut:

Inserting an FAQ by shortcut requires you to know the shortcuts beforehand. Each shortcut is linked to an FAQ item it is defined for. If you do not remember the shortcut, you can go to the FAQ knowledge base.

1. During a live chat, enter the FAQ shortcut that refers to the information customer is looking for in the **Shortcut** entry window.
2. Click **Insert FAQ**.
   A link to the FAQ inserts in the chat interaction window.

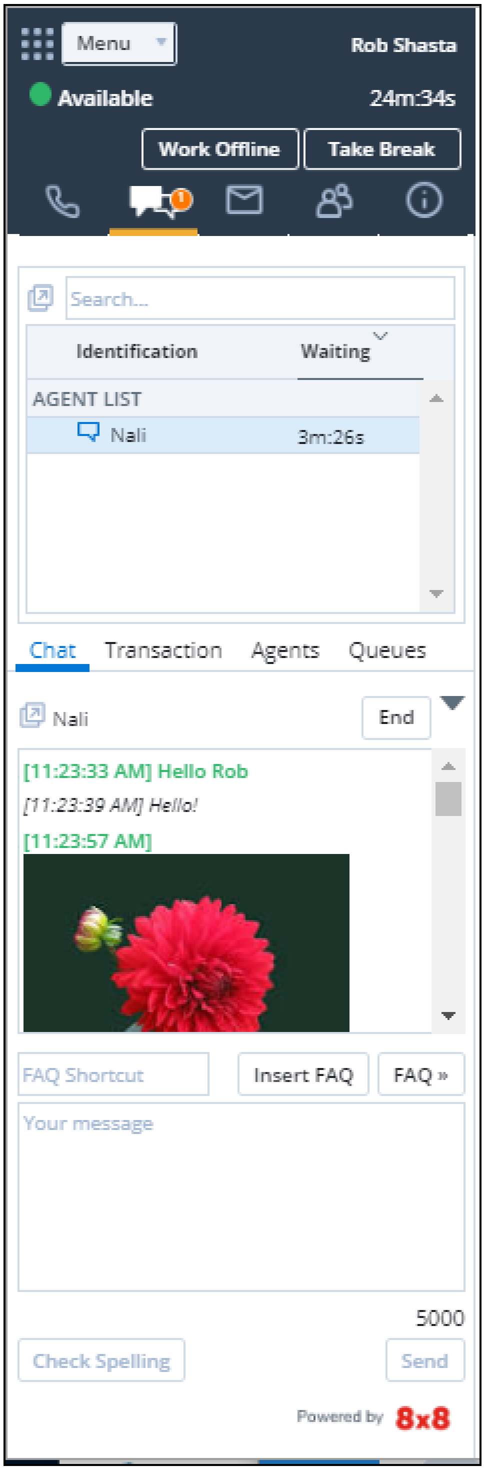
3. Click **Send** to communicate this information to the customer participating in the chat.



To insert rich media FAQs:

1. During a live chat, locate and find an image on internet.
2. In the right-click menu, copy the image and paste it to the chat window and share it with your customers. Or, select and add a local drive image to an FAQ. Then insert the FAQ in the live chat window.

3. Click **Send**. The image is now sent.



HTML Tags in Chat Editor

Note: Tables and more complex HTML elements or contents are not supported by the editor and will always be inserted into the chat as a link to the HTML content.

Type	HTML Tags
Supported tags (inserted directly)	■ Text Formatting: <div>, <article>, <blockquote>, <h1>, <h2>, <h3>, <h4>, <h5>, <h6>, <p>, <span>, <i>, <b>, <u>, <sub>, <sup>, <em> ■ Links: <a> ■ Lists: , , , <dd>, <dl>, <dt> ■ Images: <img> ■ Other tags: <hr>,
Not supported tags (inserted as link)	<table>, <tr>, <thead>, <td>

Process Email Interactions

Email interactions provide a means of receiving and responding to customer inquiries using Agent Console.

Processing email interactions using Agent Console requires access to Local CRM. If your Agent Console is configured to interoperate with an External CRM, the Local CRM continues to process all email interactions received by Agent Console.

When Agent Console offers you a new email interaction, the Local CRM presents the email in the Display Panel. Based on the email ID or case ID contained in the email, the Local CRM searches for matching records.

- If the From field of the message contains the email address of an existing customer, the relevant customer record pops up, and the incoming email is saved as a new case for the customer.
- If the subject of the email bears a valid case ID from the Local CRM, the customer record pops up, and the incoming email is saved as a follow-up of the relevant case.
- In the absence of matching data, a new customer and case record are created.

For information about configuring your Agent Console profile's email settings, see Configure Your Profile.

Features

The Agent Console email controls enable you to:

- Accept inbound email interactions.
- Reply immediately to an email interaction, or save a partial reply for later processing.
- Transfer an email interaction to a different queue.
- Insert pre-formatted answers to frequently asked questions into email replies.

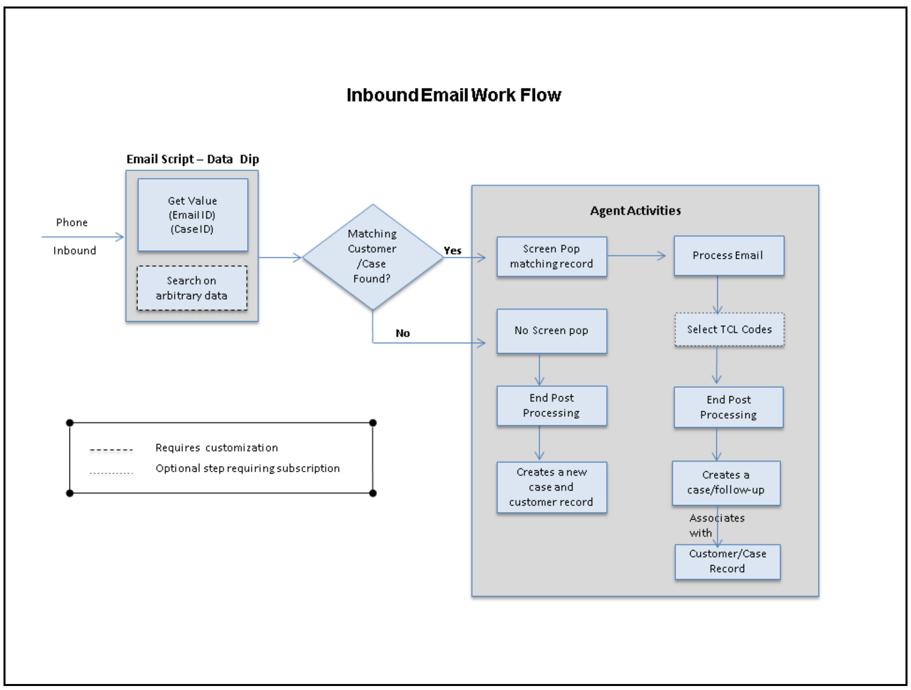
- Pull and optionally delete unread email messages from your email queues, if your agent account permissions allow it.

Inbound Email Work Flow

Email interactions flowing into Virtual Contact Center stay in an email queue until an agent is available. When an agent is available, the longest-waiting email in the queue is offered to the agent. Virtual Contact Center searches the Local CRM database for existing customer records based on email ID or case number. If the email is from an existing customer, the relevant customer record is presented to the agent via screen pop. In the absence of a matching record, a new customer record is created.

A screen pop occurs either before or after the agent accepts an interaction, based on the screen pop settings configured by contact center administrator. The agent processes the email and may select transaction codes to indicate the disposition. Selecting transaction codes may be optional or mandatory based on the settings. The email processing ends, and the agent gets post-processing time for a final wrap-up. If codes are mandatory, the interaction stays in post-processing mode until codes are selected.

The sequence of events in an inbound email flow may be represented as follows:



Accept Email Interactions

Virtual Contact Center directs emails to agents via an email queue. Agent status must be Available to receive these incoming emails. When an incoming email is offered to an agent, the Email tab blinks, indicating an incoming request. The agent can accept, or if permitted by administrators, reject the request. On accepting, the agent's status changes to Busy. On rejecting the email, the agent's status changes to Working Offline.

Prerequisites

To receive emails, an agent must be:

- In the Available state.
- Assigned to an enabled email queue.

> **Note:** You can view or edit your queue assignments in the Agent Profile. For details, refer to View Your Assigned Queues.

If an email queue has pending emails, you can:

- Pull all queued emails at once.
- Accept one email at a time.

> **Notes:**
> - Pulling emails is a privilege given by the administrator in Configuration Manager.
> - You cannot receive emails (including attachments) larger than 30 MB via email channels.

Pull Emails

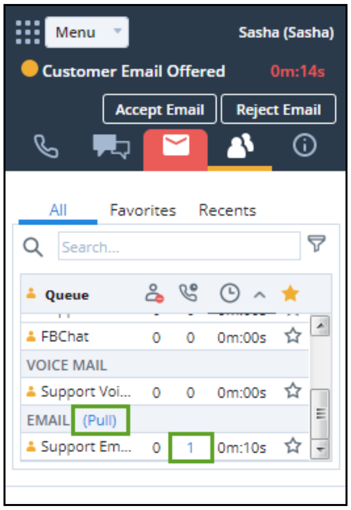
Pulling emails from a queue gives you the flexibility to quickly look at the sender or the subject of the email, and then accept an email that requires the most immediate attention. The Status tab in the Control Panel lists your email queues, and indicates the number of emails pending in a queue.

To pull emails from a queue:

1. In Agent Console, set your status to **Working Offline**.
   If your status is Available, Agent Console may offer you a new interaction before you can complete pulling email

interactions from an email queue.

2. Go to the **Queue** tab in the Control Panel.
3. Click **Pull** or click the number of emails.



Agent Console pulls all emails from the queue, and presents the list in the Display Panel. Change the order of emails by clicking the column heading. You can sort by wait time, case or follow-up number, email channel, contact name, name of the company, or the email subject.

Note: If your Virtual Contact Center administrator has given you the permissions to delete, you can identify unwanted emails from the list of pending emails, select, and delete them. To delete emails, see Delete Emails from a Queue.

4. Check the sender and/or subject of the email, and click under the **Subject** column of an email you wish to open. The email is offered to you instantly. The email tab blinks red. The work flow is the same as accepting an email.

   If the email is from an existing customer, a relevant case or customer record pops up for preview as well.

Note: If you have multiple emails opened in tabs, the screen pop tab, which displays the case number and customer name, helps you navigate better.

Note: If the screen pop fails to open, clean up your browser cache and cookies and log back in.

5. Click **Accept Email**.
   Your status changes to Busy. The email creates a case, and opens in a new tab.

   Note: The Reject interaction button is disabled if your contact center administrator has not granted the permission. This prevents agents from rejecting the interactions they are offered.

6. Your status changes to Post Processing, and then back to Work Offline. The email saves as a case in the Open state, and is assigned to you.
   You can edit case details, reply, or create a new follow-up.
   - To edit, click Edit. Read more [1]
   - To reply, click Reply. Read more [2]
   - To create a new follow-up, click New follow-up. Read more [3]

Accept One Email at a Time

To accept one email from the queue:

1. Change your status to **Available**.
   If you have an incoming email, the Email tab in the Control Panel blinks red. If the incoming email is from an existing customer, the customer record pops up for preview.

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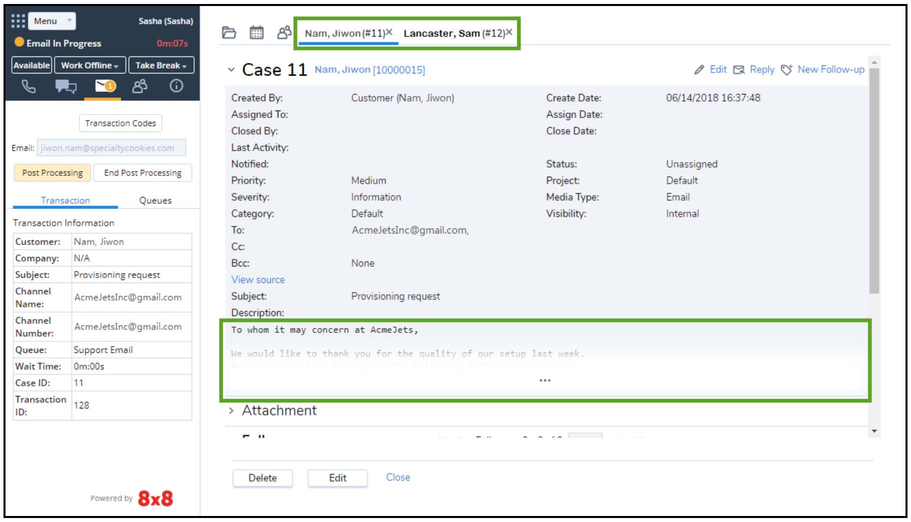
[1] In the edit mode, you can change case details such as the status, priority, severity, subject, and more. Select Notify to notify another colleague or the customer about case details. For more details on editing case records, see Create and Edit Case Records.

[2] In the reply mode, you can respond to the customer email, or insert case details, attachments, or content from FAQ knowledge base. The case information (original email) is attached automatically.

[3] You can create a new follow-up, respond to the customer email, or insert case details, attachments, or content from FAQ knowledge base. The follow-up record does not include the original email.



2. Preview the customer or case data, and click **Accept Email**.

   Your status changes to Busy. The email creates a new case or follow-up record, and opens in a new tab. The screen pop tab that presents the email displays the case ID and customer name.

   Note: If you have multiple emails opened in tabs, the screen pop tab, which displays the case number and customer name, helps you navigate better.

   Note: If the screen pop fails to open, clean up your browser cache and cookies and log back in.

3. Your status changes to Post Processing, and then back to Available.

   The email saves as a case or follow-up in the Open state, and is assigned to you. You can edit case details, reply, or create a new follow-up.

Access Customer's Related Emails

Agents can access queued emails from the same customer, review and respond to them at once. When a customer sends multiple emails within a short time interval regarding a case, all emails get queued. When an agent opens the first email to respond, there is a link to view the queued emails from the same customer. The agent can click this link to view all the queued emails, and review and respond in a single email if they are related to the same case. This helps agents consolidate their response in a single email and increase their efficiency while improving the customer experience.

Features

- Allows centralized access to queued emails from the same customer.
- Improves customer experience with a consolidated response to multiple related emails.
- Increases efficiency by preventing multiple agents to work on related emails from the same customer.

Use Case

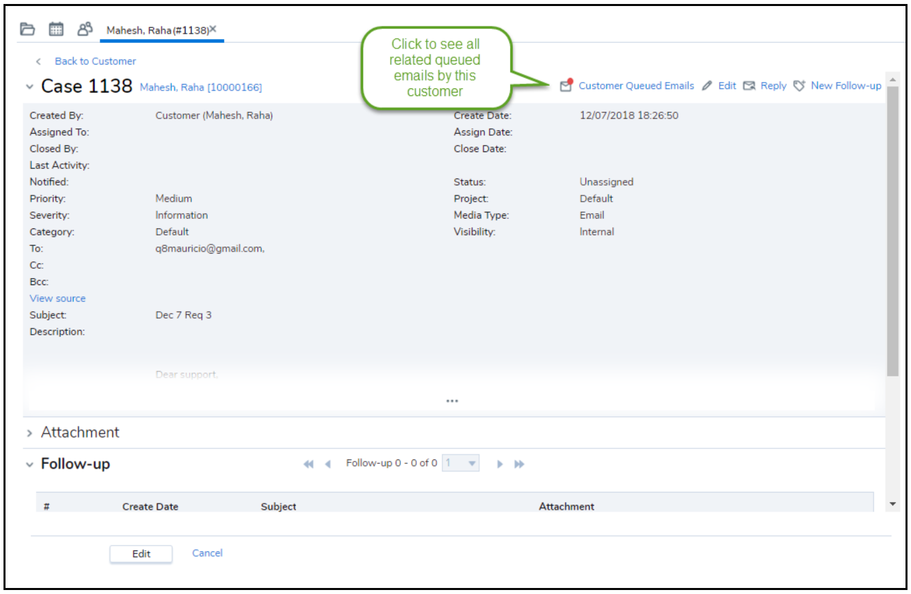
Let's say a customer sends three separate emails regarding an urgent support issue to AcmeJets customer service in a short period of time. Three agents handle those emails:

- Agent A receives and accepts the first email from this customer, and responds.
- Agent B receives and accepts the second email from this customer, and responds.
- Agent C receives and accepts the third email from this customer, and responds.

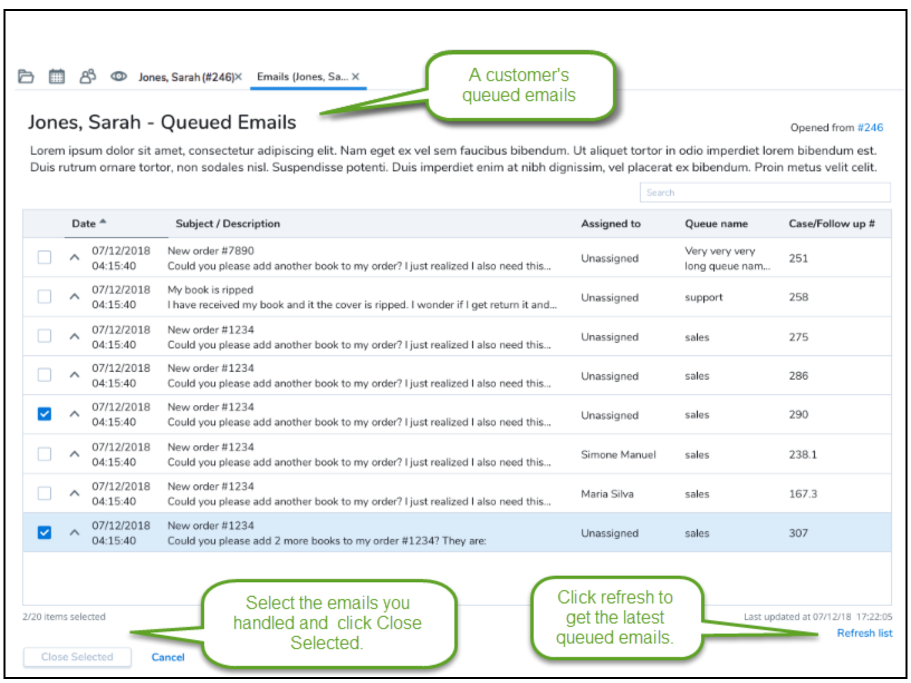
The customer receives three emails from agents A, B, and C at AcmeJets (a poor customer experience). The time and effort spent by these agents can be used more efficiently if only one agent handles the case. Agent A who responds to the first email from this customer can also respond to other related emails sent by this customer. By accessing related emails in the queue, agent A reviews and closes emails related to the same issue.

To access related emails:

1. Log in to Agent Console as an agent.
2. Set your status to **Working Offline**.
   If your status is Available, Agent Console may offer you a new interaction before you can complete pulling email interactions from an email queue.
3. Open the email queue in the Control Panel and click **Pull**.
4. In the **Pending Emails**, open the customer's email and start working on the case.
5. While crafting a response to the case, click the  **Customer Queued Emails** to open the list of queued emails from that customer. The red dot indicates there are some related emails in the queue.



6. In the customer's **Queued Emails**, click any row to expand or collapse. You can preview the email contents.



7. Craft your single email response while checking the related emails.

8. Click **Refresh list** to update the queued emails. The queued emails list is not automatically updated. The manual refresh displays the exact date and time of the update.

> **Note:** You can select up to 20 queued emails at a time. Change the order of emails, or sort them by desired fields. You can search by any field except Subject/Description.

9. Click **Send** once your email is complete.
10. In queued emails, select the emails you have already handled and click **Close Selected**. It assigns the open cases to you, closes the cases, and removes them from the queue.
    For details, see our content on how to process email interactions.

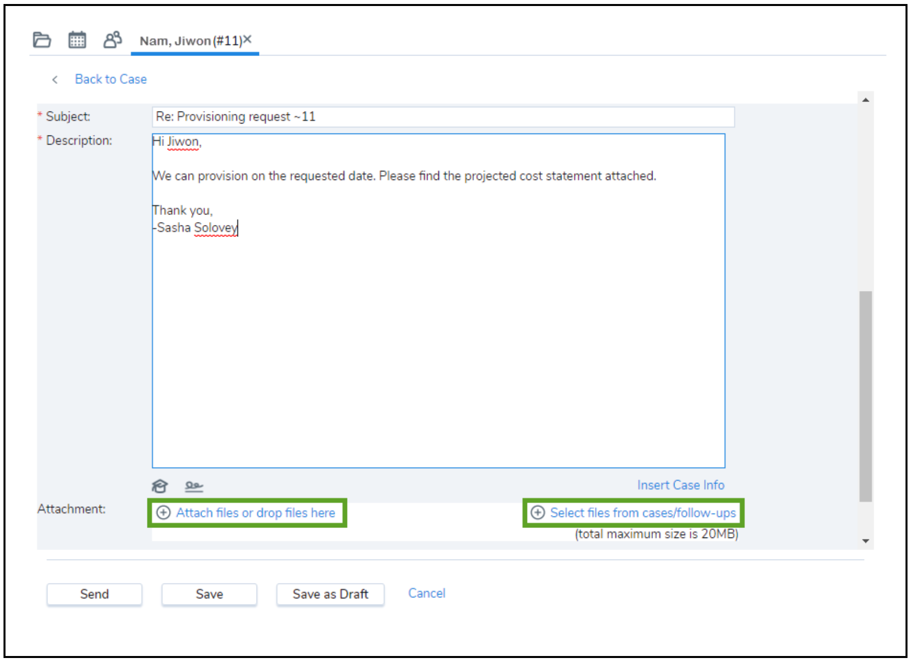
Respond to Emails

When you accept emails, they are saved as cases in the Open status, and are assigned to you. If you respond to these emails, you create new follow-ups.

To respond to an email:

1. Go to **Cases** tab and open the desired case.
2. Click **Reply**.

   A new tab opens to create a new follow-up for the case. The customer's email ID and the email content are automatically populated. The email response automatically includes the email header, that is information about sender, recipient, subject, date and time. The email subject contains the case number.
3. Select **Signature**.
4. Compose your response to the email in **Description** box.
5. In the **Attachment** section:
   - Click **Select files from cases/follow-ups**.
     A list of attachments linked to the case and/or follow-ups is displayed.



OR

- Click **Attach files or drop files here** to select a file from your computer.

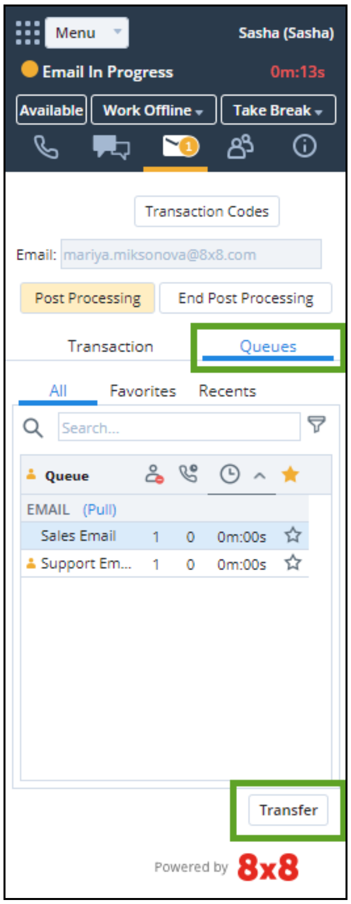
6. Select the desired attachments.

Note: You can add email attachments that are already linked to the case or the follow-ups while replying to or forwarding the email. There is no limit on the number of attachments, as long as they do not exceed a total of 20 MB.

7. To save a draft of the interaction for completion at a later time, click **Save as Draft**. The follow-up record is added to the case as a draft.
   OR
   Click **Send** to send the completed reply.
8. To view your drafts, click the **Cases** tab.
9. In the **Filters** drop-down, select **My Drafts** from the list, and click **Go**.
   From the list of drafts, select the draft you want to view. For information about working with cases, see Create and Edit Case Records.

Transfer Emails to a Different Queue

After accepting an email, you may want to transfer it back to the same queue or another queue to be handled by better skilled agents, or to tend to historical handling. You can transfer an email interaction to a different queue after you accept the email and during the post processing time.

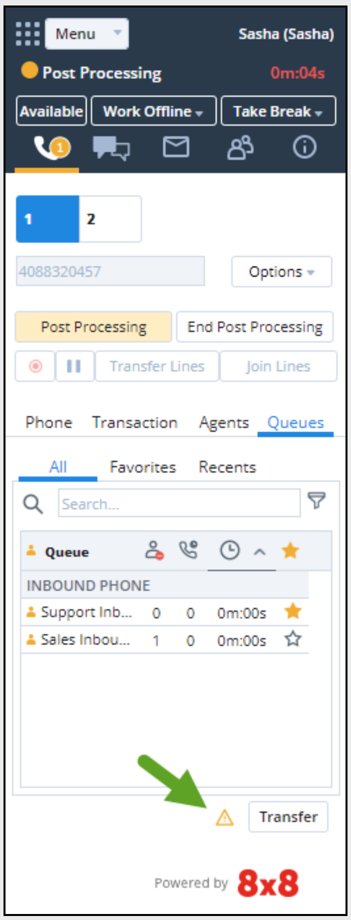


To transfer a new email interaction to a different queue:

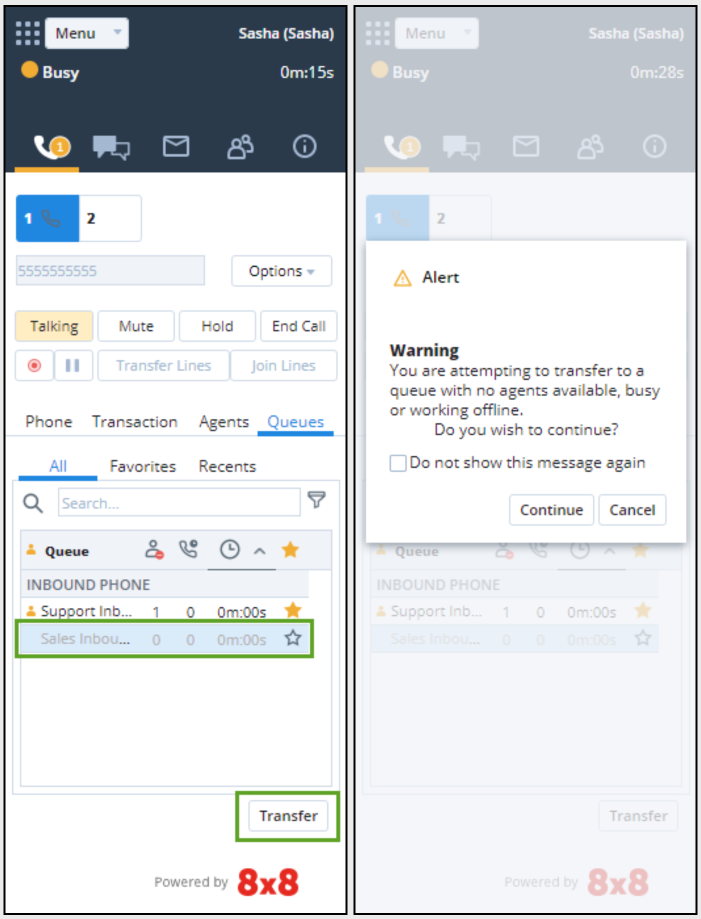
1. In the Control Panel and from the Email tab, accept an email interaction offered.
2. During post processing timeout interval, and from the Two Tabs view, go to the **Queues** tab in the Control Panel.

3. Select the queue to transfer the email interaction, and click .

Note: Agents may experience some delay in accessing the entire list of queues whether or not they are part of them. An exclamation symbol next to the Transfer button indicates the partial loading of the queues. Depending on the number of queues and their sizes, it may take some time for the entire list to load.



Note: If you wish to transfer to an unattended queue, you receive a warning about the non-availability of agents, or you may be blocked from transferring. You can disable the warning message by selecting **Do not show this message again** only if your Virtual Contact Center administrator has given you the right permission. Disabling the warning message prevents you from receiving this message again. Click **Continue** to transfer the interaction.



4. The email processing ends on your end and is presented to another agent available in the transferred queue.

Note: You must transfer before the post processing interval lapses.

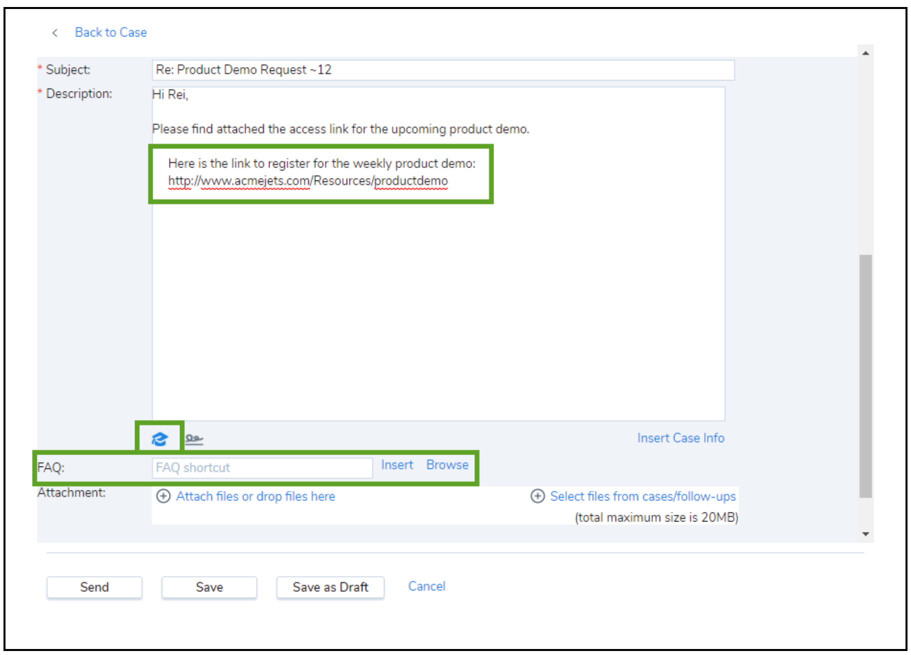
Insert FAQ Responses into Emails

If your contact center maintains an FAQ knowledge base, you can extract the relevant data from the knowledge base and insert FAQ responses into an email to customers. Using these FAQ responses minimizes agents time in finding the right information, and maintains consistent delivery of information.

You can insert FAQs in an email by referring to shortcuts or by browsing and searching through the FAQ knowledge base. Referring to shortcuts requires prior definition of shortcuts for an FAQ item.

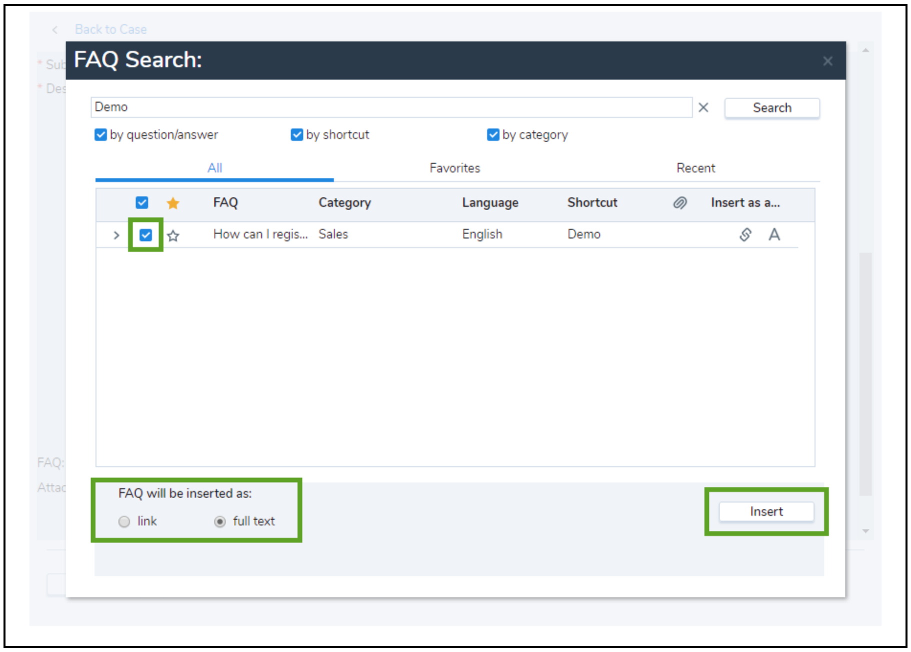
To insert an FAQ response in an email using shortcuts:

1. While crafting an email, click  under the main email text to open FAQ options.
2. Enter an FAQ shortcut in the **FAQ shortcut** text box, and click **Insert**.
   The full text of the FAQ response is inserted into the email body.



To insert an FAQ by browsing through the knowledge base:

1. While crafting an email, click under the main email text to open FAQ options.
2. Click **Browse** to open a list of available FAQs.
3. Search or sort to locate the desired FAQ.
4. **Insert** the content as a link or as full text by selecting the relevant option.
   The link or the full text content of the selected FAQ is inserted into the email body.



Delete Emails from a Queue

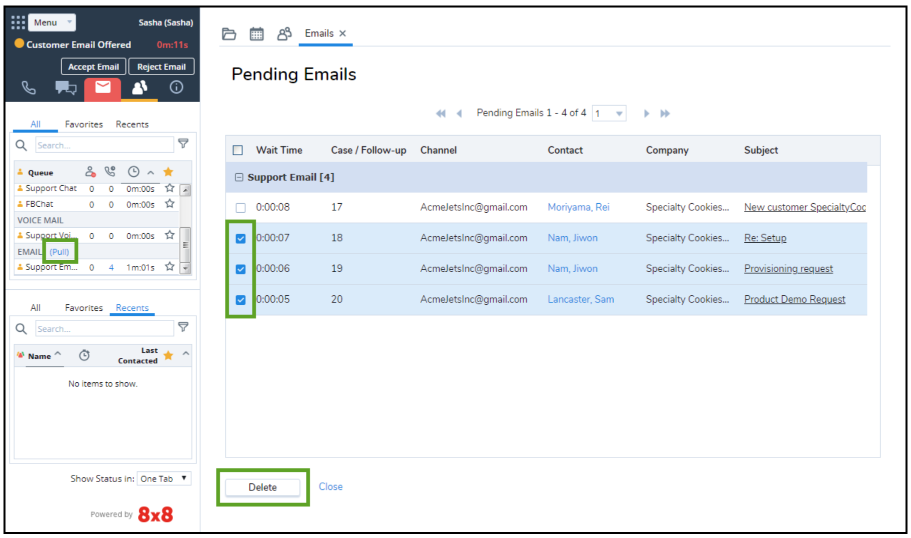
You may be able to pull email interactions from an email queue, but not delete them. Agents can delete emails only if their Virtual Contact Center administrator has configured their Agent Console account to allow deleting pending email interactions from a queue. If your Agent Console account does not have delete permissions, you are not able to see the Delete button or the check boxes to select emails.

Deleting a pulled email interaction from an email queue:

- Permanently deletes the interaction from the queue.
- Does not delete the customer record associated with the email from the Local CRM.

To permanently delete email interactions from an email queue:

1. In Agent Console, set your status to **Working Offline**.
   If your status is Available, Agent Console may offer you a new interaction before you can complete pulling email interactions from an email queue.
2. Go to the **Status** tab in the Control Panel.
3. Click **Pull** or click on the number of emails.



4. In the list of queued emails, perform one of the following:
   - To remove individual email interactions from the queue, select one or more email messages.
   - To remove all email interactions in the list, select the check box in the column heading.
5. Click **Delete**.
   Agent Console displays a delete confirmation dialog. In the dialog, click **OK** to permanently remove the selected email interactions from the queue.

Manage Customers, Cases, Follow-Ups, and Tasks in Local CRM

8x8 Virtual Contact Center provides customer and case management capabilities with its Local CRM. The Local CRM provides a model for managing your contact center's interactions with customers, and stores your contact center's customer, case, and follow-up data.

Virtual Contact Center's phone, chat, and email scripting can use information about an incoming interaction, such as a phone number, a case number, or an email ID, to locate and display a customer or case record contained in the Local CRM. As an agent, you can use the Local CRM to record and manage your customers, cases, and follow-up activities.

To manage customer relationships, the Local CRM provides the following hierarchy of standard objects:

- Customer
- Case
- Follow-up
- Task

Features

- Create customer instances with unique account numbers.
- Describe a customer’s feedback, queries, or issues via cases.
- Create cases to systematically track and solve customer issues.
- Quickly access cases in an expandable window.
- Indicate the status of a case as open or closed.
- Determine the case's status, visibility, severity, and priority.

- Ability to create and track multiple follow-ups for each case.
- Record each communication regarding the case, as individual follow-up instances.
- Organize and track all interactions associated with a customer via tasks.
- Receive reminder pop-ups a few minutes before the scheduled call.

Customers

A customer object allows you to create customer instances with unique account numbers. A customer record stores information, such as name, account number, email, address, and phone numbers, and offers the capability to customize the customer object with custom fields.

Cases

A case object describes a customer's feedback, queries, or issues. You can create cases to systematically track and solve customer issues. You can quickly create, update, and view cases in an expandable window. You may indicate the status of a case as open or closed. The standard definition of a case allows you to add additional attributes to a case by stating the status, visibility, severity, and priority.

For example, a support agent at AcmeJets creates a case when a customer calls in reporting scheduling issues with private jets. The support agent captures and records the customer reported issue by creating a case.

Follow-ups

A case may have multiple follow-ups before it is resolved. Each communication regarding the case from its creation until it is closed may be recorded as individual follow-up instances. This may include notes and email communications regarding the case. The Follow-up object allows you to track how a case is resolved by creating multiple follow-up records.

Tasks

A Task refers to a call, email, meeting, chat, or any other type of contact made with a customer. A task organizes and helps you track all interactions associated with a customer. The task object serves to create, and manage all tasks you plan to perform or have performed, such as making calls or sending mails. For example, you can create a task to schedule a phone call to a customer, and set a reminder. A reminder pops up a few minutes before the scheduled call.

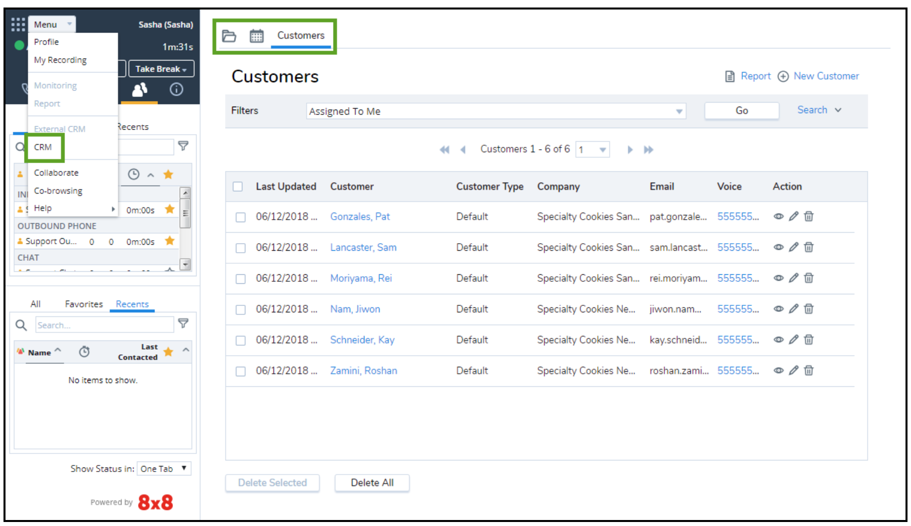
Integrate with External CRM

Virtual Contact Center also supports integration with an External CRM, such as NetSuite or Salesforce. If your Agent Console integrates with External CRM, your contact center supervisor provides you with the information you need to use the CRM to manage your customers, cases, and follow-up activities.

CRM Landing Page

When you log in to Agent Console, the Display Panel launches separate tabs for:

- **Cases**: lists cases assigned to you, and groups all related tasks, such as creating a new case, editing, and deleting cases, as well as reporting.
- **Customers**: lists customers assigned to you with centralized access to related tasks, such as editing a customer record or adding a case, a follow-up, or a task.
- **Tasks**: Lists tasks assigned to you with the ability to create new tasks, edit, or delete tasks.



Customize Lists of Customers and Cases

Selecting a CRM tab lists customers, cases, and tasks. Click **Filters** to filter the list as follows:

- **Assigned to me**: open cases and customers whose cases are assigned to you. This is the default option.
- **Assigned to my group**: open cases and customers whose cases are assigned to your group members.

- **Created by me**: cases and customer records created by you.
- **My Draft Customers** or **My Drafts** (for cases): cases and customer records saved by you as drafts.

Create and Edit Customer Records

You can create a new customer record at any time using the New Customer link in the Customers tab, if your administrator has granted the necessary privileges. While processing an interaction, Virtual Contact Center searches the Local CRM for existing matching data. In the absence of matching customer records, agents are prompted to enter a new record via screen pop.

The following describes the use of the default customer fields. Depending on how your contact center administrator has configured your Local CRM, the customer creation tool may display additional customer fields.

To create a customer record:

1. Click **New Customer** link in the **Customers** tab.
   Agent Console displays the Create New Customer page.
2. Enter the customer's **First Name** and **Last Name**.
   You must specify the customer's name before you can save the new customer record.
3. Enter the customer's **Email** address.
   Each customer email address must be unique. Agent Console uses the customer's email address to send the customer their optional Support Center access credentials. To prevent a single customer email address from receiving multiple Support Center access credentials, Agent Console uses the Local CRM to verify that each customer email address is unique. You can save email addresses that has up to 254 characters.
4. To require that the customer specify an account number and password to access the contact center's Support Center, perform the following:
   a. Select **Restrict customer's access to Support Center**.
   b. To specify the customer's Support Center password yourself, type a password in the **Password** text entry area.
   OR
   To have Agent Console create the customer's Support Center password, select **Generate password automatically**.

Note: When you save the new customer record, Agent Console sends the customer's Support Center access credentials to the email address specified in the Email text entry area.

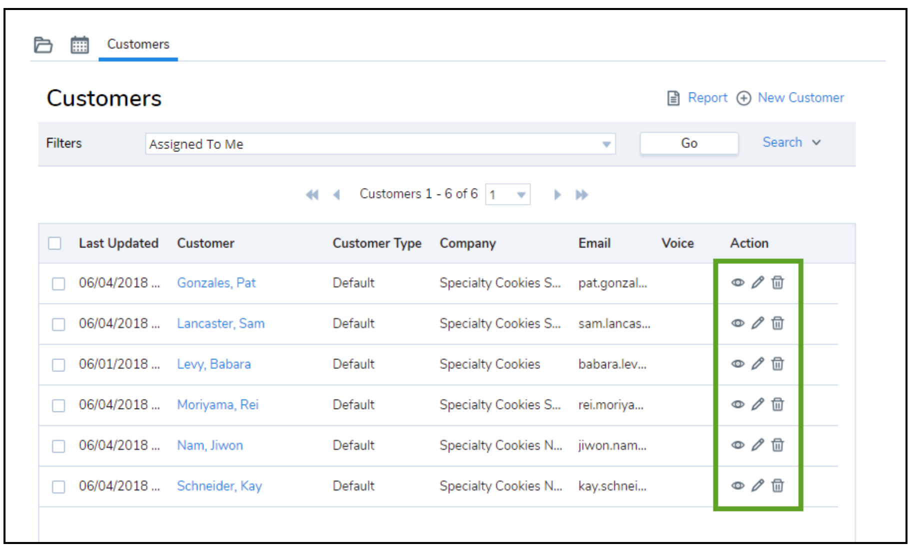
5. Enter the customer's address in the **Primary Address** and **Secondary Address** areas.
6. Select to **Save** the customer or **Save as Draft**.

Edit or Delete Customer Records

After you create and save a customer record, you can edit the information or delete a customer record, provided that you have the permissions to delete and edit. Contact your Virtual Contact Center administrator to learn about your permissions.

To edit a customer record:

1. Click the **Customers** tab. A list of customers appears.
2. Click one of the actions items available to view or edit the customer record.
   OR
   Select and open a customer record from the list, and then click **Edit** at the bottom of the page.

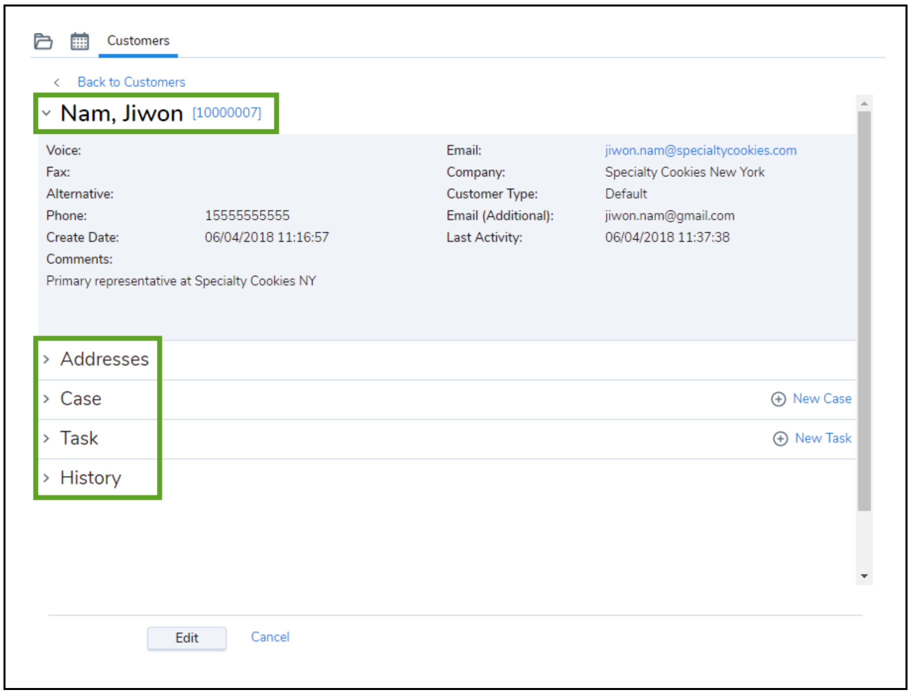


View Customer Records

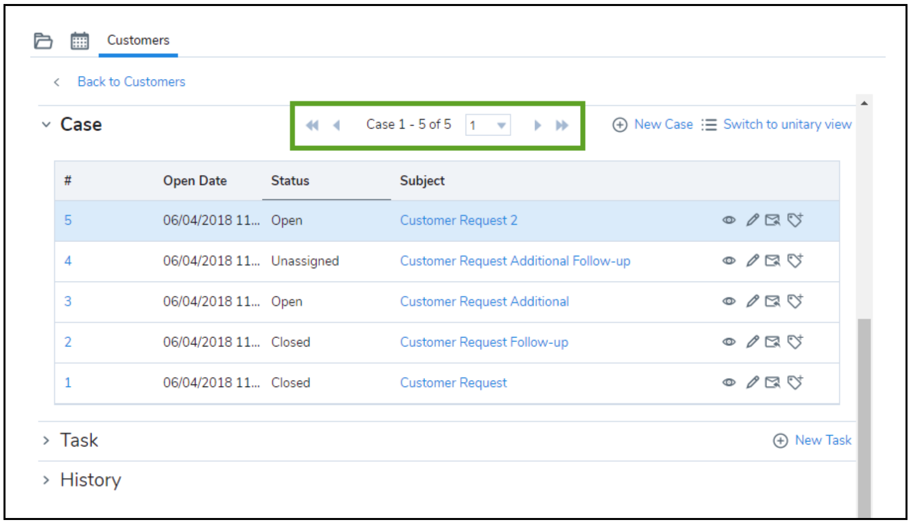
When you open a customer record, you are able to view the customer details such as name and account number, as well as cases, tasks, and the history of changes made to the customer record.

Note: You can configure the order of columns in the result page to arrange them in a particular order. To change the order, select and drag the column to the desired location.

- **Details**: Includes voice, email, company, phone, address, etc. The customer last name, first name, and account number appear as a link in title. Clicking **Back to Customers** takes you back to the customer list.



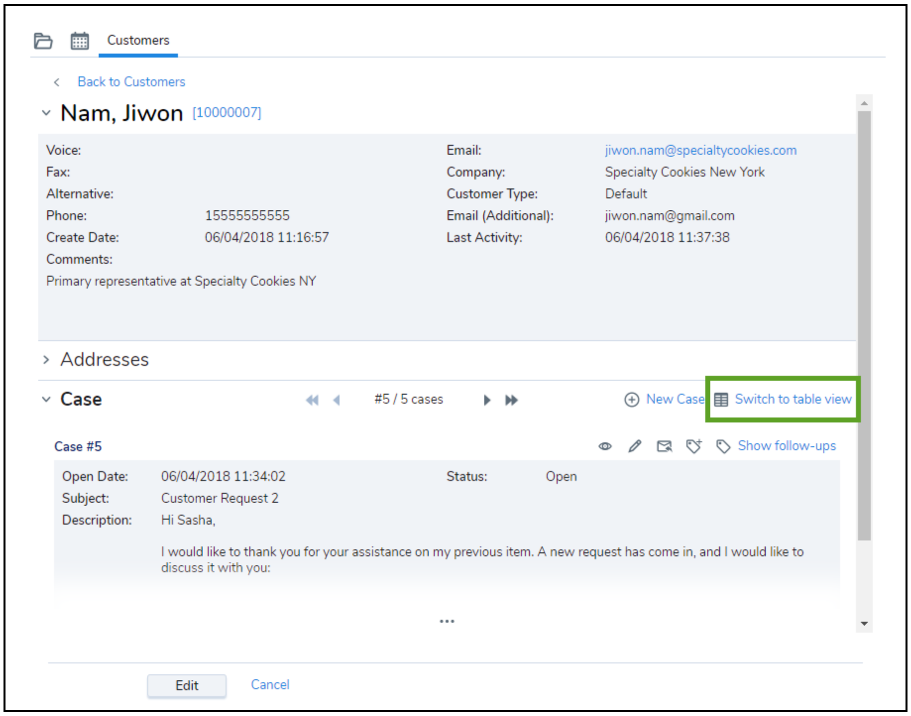
- **Case**: Includes the cases or records of interactions with the customers created during or after an interaction. You can view cases in **Table view** or **Unitary view**. Table view lists all cases associated with the customer in a tabular format. Unitary view shows one case at a time, and can be navigated using the pagination tools. Table view is the default view when you first open cases.



If a case is created as a result of an incoming email through the email channel, you are able to see the To, CC, and BCC fields in the details.

To view the email fields and source of email from the Customers tab:

1. In Agent Console, go to the **Customers** tab.
2. Select a customer, and go to **Case** to see the list of cases.
3. Highlight a case from the list, and select **Switch to unitary view**. The case details display, and information in the To, CC, and BCC fields. Clicking **View source** allows you to see the email protocol routing.



You can see one case at a time. Use the pagination tools to go to other cases.

4. Click ••• to see all content.

- **Task**: Includes tasks such as calls, emails, meetings, chats, or any other type of contact made with a customer.
- **History**: Includes the history of changes made to the customer record.

Create and Edit Case Records

When you process an interaction with an existing customer, you create or edit a case record of the interaction either during or after the interaction. You can create, edit, and save a case record, which the CRM pulls out during the next interaction with the same customer, enabling you to process the case efficiently. Create follow-up records to handle subsequent interactions with the customer regarding the same case. When the customer needs information, you may respond by emailing the case information to them.

The Cases tab allows you to:

- Create a case record.
- Edit an existing case record.

- Create a follow-up record.
- Send case information notifications.

Best Practice: Edit an existing case record if you wish to re-word a case record or change the case attributes such as Status, Priority, Severity, etc. Create a follow-up record for each subsequent interaction of the same case.

The following describes the use of the default customer fields. Depending on how your contact center administrator has configured your Local CRM, the customer creation tool may display additional customer fields. You can notify the customer while creating a case.

To create a case record:

1. Go to the customer for whom you are creating a case, and click **New Case**.
   OR
   Click **New Case** in the **Cases** tab.
   Agent Console displays the Create New Case page.

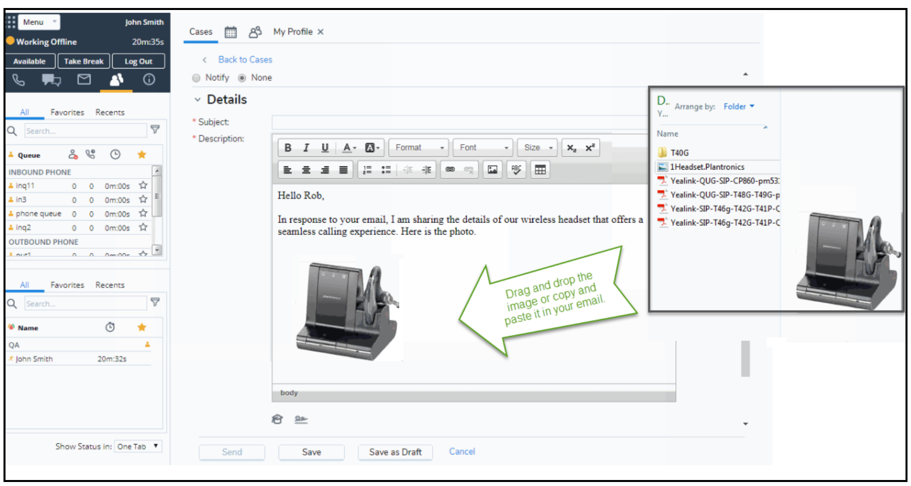
2. Select a **Customer** to associate with the case.
3. Change the **Status** to **Open** to assign the case to an agent.
4. Click **Notify** if you want to send the customer a case notification or email.
   a. Select the **From** address. It can be an agent's or group's email address. Email addresses can have up to 254 characters.
   b. Select the **To** address from the list of recipients, such as the customer, if not populated automatically. Select **CC** and **BCC** recipients if needed.

   Note: Based on the configuration of your contact center, the To email addresses may populate automatically, eliminating the need to manually enter the information. You still need to add the CC and BCC addresses either from the available list of recipients or manually.

c. For **Subject** and **Description**, enter the subject of your email and your message regarding the case.

> **Note:** If HTML support is enabled for CRM, you can create content in the Description field using the CRM rich text editor. For details on using the CRM rich text editor, see Understand Your Rich Text Editor.

d. Click to add an image. Copy and past the URL link of the page or image you would like to insert, and enter a descriptive name for the image in the **Alternative Text** box.
Alternatively, you can drag and drop the images or paste them from your clipboard quickly. When you embed a high resolution image in your case, a follow-up, or 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. The maximum size allowed for image attachments is 20 MB. With drag and drop, you can add images up to 10 MB.



> **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.

e. Select the **Signature** for the email message.

> **Note:** You must set the right values for the Default From and Default Signature fields in your profile to automatically populate the From and Signature fields in the Notification tab.

5. Optionally, insert FAQs or attach files to the case record.
   You can insert FAQs using shortcuts, or by browsing through the FAQ knowledge base. Shortcuts link to the FAQs. For details, see Insert FAQ into Email Responses.
   - To insert an FAQ shortcut, enter the shortcut and click **Insert FAQ**.
   - Click **Browse FAQ** to browse through the FAQ knowledge base, and insert the desired FAQ responses either as full text or links.
   - Attach files by browsing or by dragging files from the local file system.
6. Perform one of the following tasks:
   - Click **Save as Draft** to save a draft of an incomplete case record.
   - Click **Save** to save a completed case record. You can access and edit the case record later.
   - Click **Send** to mail the case record. If the To and From addresses populate automatically, the mail is sent, successfully creating a case record.

> **Note:** Based on the configuration of your contact center, the To and From email addresses may populate automatically, eliminating the need to manually enter the information.

If your contact center configuration does not allow automatic populating, enter the addresses manually.

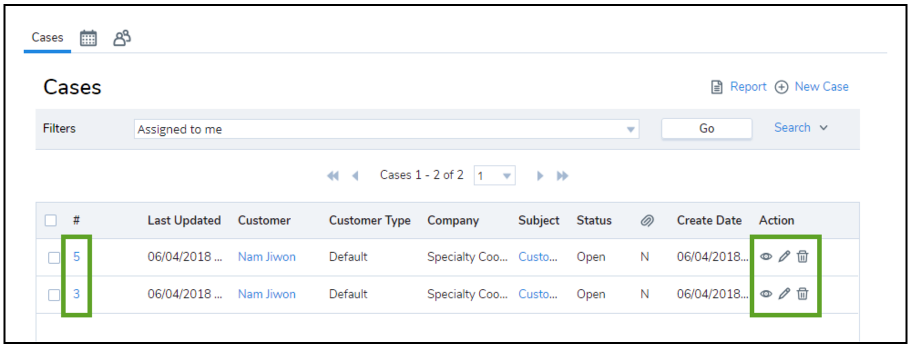
Edit or Delete Case Records

After you create and save a case record, you can edit the information or delete a case record provided that you have the permissions to delete and edit. Contact your Virtual Contact Center administrator to learn about your permissions.

To edit a case record:

1. Click the **Cases** tab. A list of cases appears.
2. Click one of the actions items available to view, edit, or delete the case record.
   OR

Select and open a case from the list by clicking the case number. Click **Edit** at the bottom of the page.

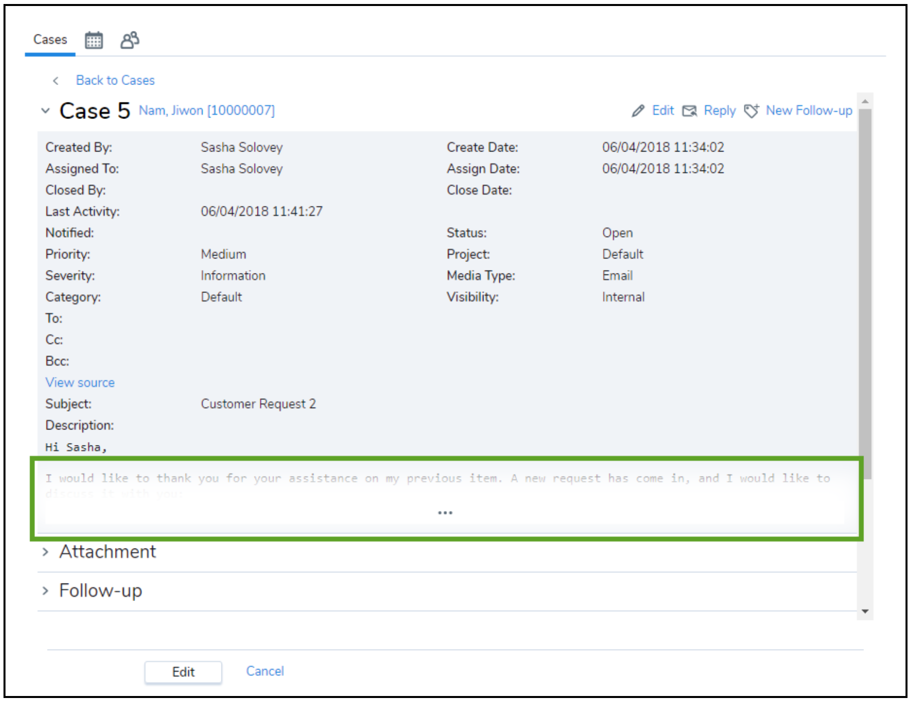


View Case Records

When you open a case, you are able to view details, attachments, follow-ups, and history.

> **Note:** You can configure the order of columns in the result page to arrange them in a particular order. To change the order, select and drag the column to the desired location.

- **Details**: Includes information such as the case ID, customer name, account number, status, the agent who created the case, and case description. To view the entire description, click ••• to expand the comment pane.



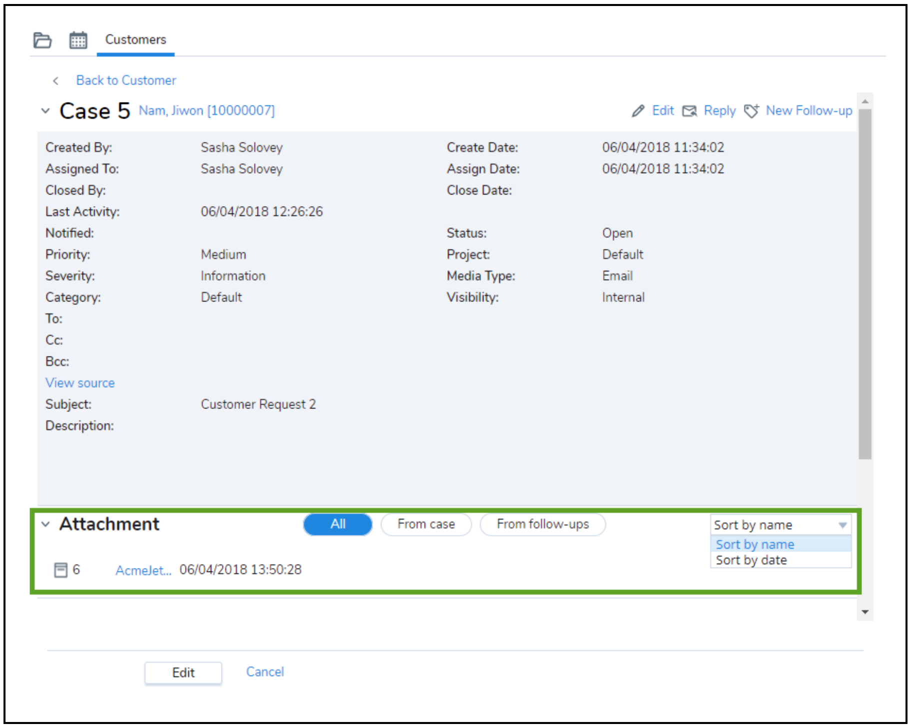
If a case is created as a result of an incoming email through the email channel, you are able to see the To, CC, and BCC fields in the details.

- **Attachment**: Lists all attachments associated with a case and its follow-up records. You can either sort the attachments by name or date, or filter them by the case or follow-up attachments.

To view and open case attachments:

When downloading CRM attachments, based on the privileges granted to you, you either have the ability to open and save the CRM attachments from emails by clicking the attachments, or are restricted to just saving them locally before opening them. With this restriction, you can exercise caution before opening an attachment, and look out for insecure attachments.

1. In Agent Console, go to the **Cases** tab and open a case.
2. Open **Attachment**.



- Click **From Case** to view only the attachments associated with a case.
- Click **From Follow-ups** to view only the attachments associated with the case follow-ups.
- Click **All** to view all attachments associated with the case and its follow-ups.

3. Click the desired attachment to download the file.

- **Follow-up**: Lists the case follow-ups. A case may have multiple follow-ups before it is resolved. Each communication regarding the case from its creation until it is closed may be recorded as individual follow-up instances.
- **History**: Includes the history of changes made to the case.

Create Follow-up Records

When you process an interaction with an existing customer, you create or edit a case record of the interaction either during or after the interaction. You can create, edit, and save a case record which the CRM pulls out during your next interaction with the same customer, enabling you to process the case efficiently. Create follow-up records to handle subsequent interactions with the customer regarding the same case. When the customer needs information, you may notify them of the follow-up.

The following describes the use of the default follow-up attribute fields and lists. Depending on how your contact center administrator has configured your Local CRM, the follow-up creation tool may display non-default follow-up attributes.

Virtual Contact Center creates follow-up records automatically when you respond to an email interaction. Replying to a case also creates a new follow-up record.

To create a follow-up record:

1. Click the **Cases** tab, and open a case you would like to follow up.
2. Click **Reply** or **New Follow-up**.
   Agent Console displays the Create New Follow-up page.

   If your administrator enables HTML support for Local CRM, the CRM rich text editor shows.
   For details on using the CRM rich text editor, see Understand Your Rich Text Editor. If you are processing an email interaction, you can also use the Email tab in the Control Panel to create a follow-up record. For details about creating a follow-up record while processing an email interaction, see Process Email Interactions.
3. In the new follow-up page, update follow-up properties.

   > **Note: Case Status** must be open before you can assign the case.

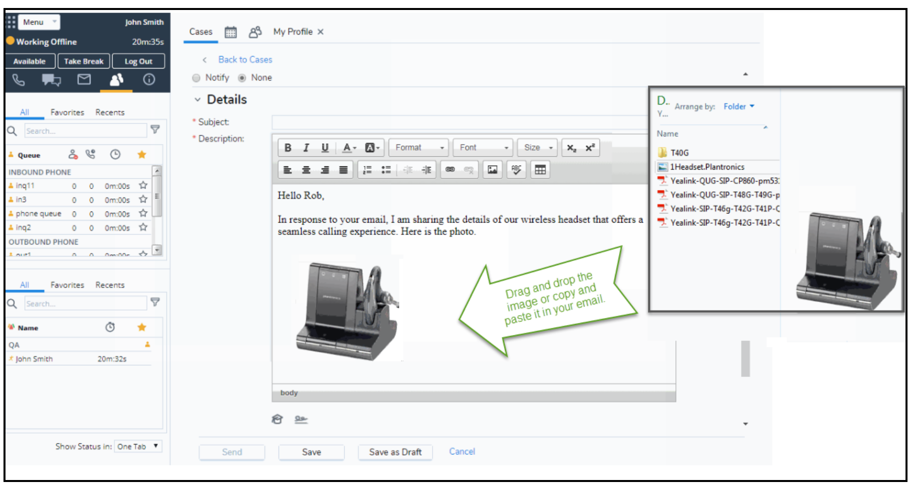
4. In **Notification**, select **Reply** or **Reply All** to notify the customer with an email of the follow-up message.
   a. Select the **From** address. It can be an agent's or group's email address. Email addresses can have up to 254 characters.
   b. Select the **To** address from the list of recipients, such as the customer, if not populated automatically. Select **CC** and **BCC** recipients if needed.

      > **Note:** Based on the configuration of your contact center, the To email addresses may populate automatically, eliminating the need to manually enter the information. You still need to add the CC and BCC addresses from the available list of recipients, or manually.

c. For **Subject** and **Description**, enter the subject of your email and your message regarding the case.

> **Note:** If HTML support is enabled, you can create content in the Description field using the CRM rich text editor. For details on using the CRM rich text editor, see Understand Your Rich Text Editor.

d. Click to add an image. Copy and past the URL link of the page or image you would like to insert, and enter a descriptive name for the image in the **Alternative Text** box.
Alternatively, you can drag and drop the images or paste them from your clipboard quickly. When you embed a high resolution image in your case, a follow-up, or 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. The maximum size allowed for image attachments is 20 MB. With drag and drop, you can add images up to 10 MB.



> **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.

d. Select **Signature** for the email message.

> **Note:** You must set the right values for the Default From and Default Signature fields in your profile to automatically populate the From and Signature fields in the Notification tab.

5. Optionally, insert FAQs or attach files to the follow-up record.
   You can insert FAQs using shortcuts or by browsing through the FAQ knowledge base. Shortcuts link to the FAQs. For details, see Insert FAQ Responses into Emails.
   - To insert an FAQ shortcut, enter the shortcut and click **Insert FAQ**.
   - Click **Browse FAQ** to browse through the FAQ knowledge base, and insert the desired FAQ responses either as full text or links.
   - Attach files by browsing or by dragging files from the local file system.
   - Drag and drop your images or paste them from your clipboard quickly. Open the **Image Properties** dialog box from the right-click menu to adjust the image size.

Perform one of the following tasks:

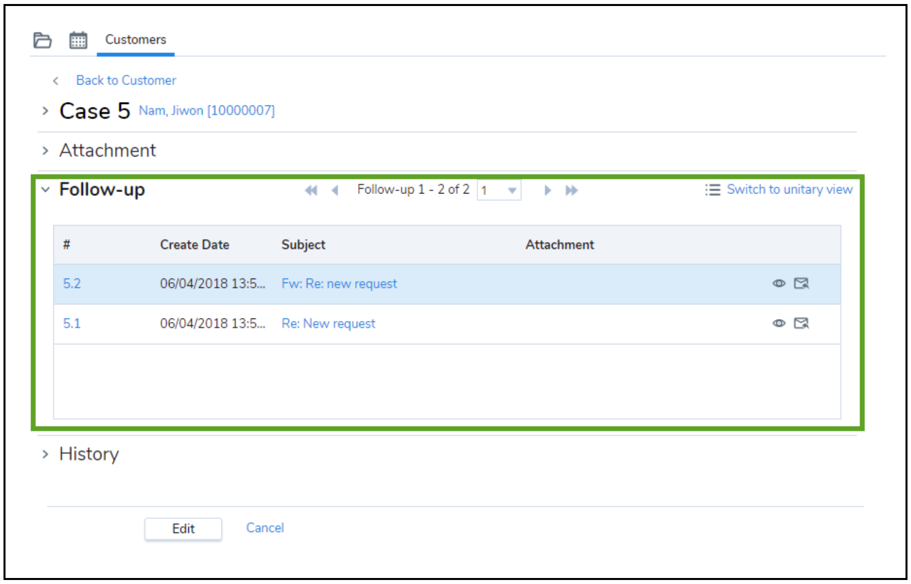
- Click **Save as Draft** to save a draft of an incomplete case record.
- Click **Save** to save a completed case record. You can access and edit the case record later.
- Click **Send** to mail the case record. If the To and From addresses populate automatically, the mail is sent, successfully creating a case record.

> **Note:** Based on the configuration of your contact center, the To and From email addresses may populate automatically, eliminating the need to manually enter the information.

If your contact center configuration does not allow automatic populating, clicking **Send** takes you to the **Notification** tab.

View Follow-up Records

A list of follow-ups related to each case appears under the case record. You can see the follow-ups listed in the Table View when you open each case record. By default, the most recent follow-up appears at the top of the list. To check the follow-up details, change the Table View to the Unitary View, or click **Switch to unitary view**.



Click on a follow-up link to view the details. To see the complete description, click in the follow-up comment pane.

Note: You cannot edit a follow-up record.

Create and Edit Tasks

If your contact center is configured to generate auto logs for voice interactions such as call, voicemail, web callback, campaign, etc. Virtual Contact Center converts these logs to task records and associates them with the relevant customer records. These call logs are also referred to as system-generated tasks. For example, your contact center can be configured to generate an automatic call log as soon as a call is terminated, and save it as a task.

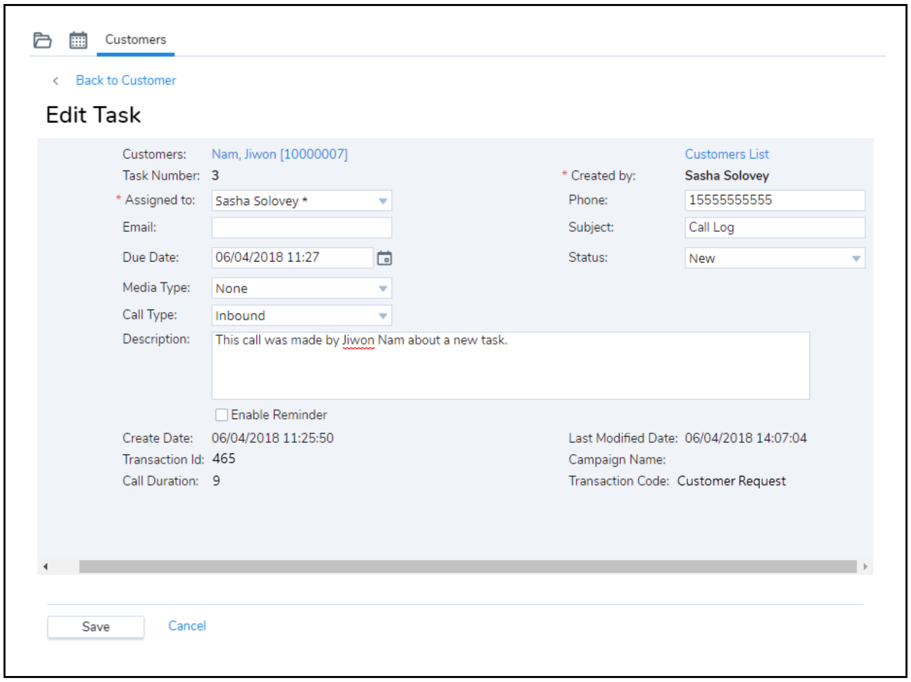
You can also create a task manually in Virtual Contact Center to organize and help you track all interactions associated with a customer. A task can be created for a call, an email, a meeting, a chat, or any other type of interaction. The task object serves to create and manage all tasks you plan to perform, such as making calls and sending emails, or the tasks you have performed in the past.

Features

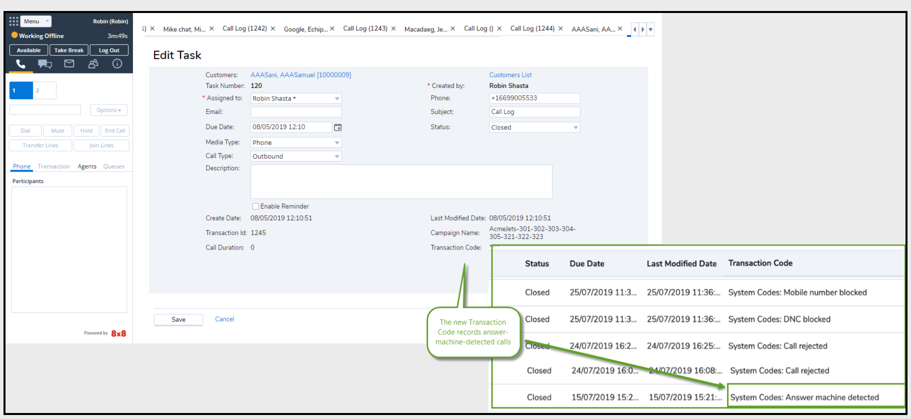
- Task fields are customizable. You can add new fields, and edit existing fields.
- Interactions logs for phone are created and saved as tasks.
- Tasks are automatically created for all campaign calls that are processed.
- Tasks are created for calls scheduled during a campaign.
- An agent can create, view, edit, and search for tasks.
- An agent can view all tasks assigned to them, and also list all tasks pertaining to a customer.
- The transaction ID is cloned, but a new task ID is generated every time you clone.
- Transaction codes associated with a call are added to the call log and saved in customer record for easier access.
- A new task ID is created, and all field values in the task form are cloned except the history, date and time the task is created, and date last modified.
- If an agent tries to delete a parent task, a warning is shown to inform the user that the parent task and its information are being permanently deleted.
- The parent task shows all tasks being cloned from the parent listed under the History tab.
- Only one parent level is allowed for each cloning task.
- The child task shows a link to the original task, and next to the task number.
- If a parent task is deleted, the child task shows the parent task in the history, but the link to the parent task is removed.
- The agent can see the clone button only if the administrator has enabled the agent to edit and create tasks under User > Edit User > Internal CRM in Configuration Manager.

View System-Generated Tasks

If configured by your contact center's administrator, a voice interaction log appears upon termination of the interaction. Depending on your contact center's configuration, you may get the interaction log in edit or view mode. If it is an existing customer, the log is associated with the customer record automatically. For new customers, however, when saving the log, you are prompted to select a customer from the existing list. The log is then saved as a task under the customer record. If you were required to select a transaction code, the code appears in the Task window and makes the record more accessible in the future. If you have more than one transaction code, they appear separated by commas.



Note: AMD, CCB, and Auto-TCL services create system-generated transaction codes. Transaction codes record the outcome of each interactions using codes such as "Answer machine detected", "Call rejected", "Mobile number blocked", "Temporary failure", etc.



See Select Transaction Codes to learn how to select transaction codes during an interaction.

Create Tasks Manually

You can create independent tasks to schedule a phone call to a customer, and set a reminder. A reminder pops up a few minutes before the scheduled call. You can create a task in multiple ways:

- **Create an independent task**: In the Tasks tab, you can create an independent task, or associate it to a customer.
- **Create a task for a customer**: In the Customers tab, you can open a customer record, and create a new task. The task is automatically associated with that customer.
- **Clone a task**: Replicate tasks with a click on the task form. This way, agents can clone a task, creating a new task ID, and associate each cloned task ID with the same original inbound transaction ID. Example use case:[1]

To create an independent task

1. Click the **Tasks** tab.
   The list of your open tasks shows by default.
2. Enter the details of the task. The task fields are customizable in your CRM. You may create custom fields, or edit existing fields.
   - **Status**: When you create a task, assign a status to indicate how the task progresses.

     Note: Pick list values are customizable.

   - **Phone**: Optionally, enter the phone number of the customer.
   - **Media Type**: Refers to the media of a task, such as phone, email, chat, or voicemail.
   - **Due Date**: Select a date to complete the task using the calendar. This creates a reminder. You can enable the reminder option to automatically generate a reminder.
   - **Assigned To**: By default, the task is assigned to the agent who creates it. To assign the task to another user, select a user from the drop-down list. You can assign a task only to a single user.
   - **Email**: Optionally, enter the email address of the contact. Email addresses can have up to 254 characters
   - **Call Type**: Refers to whether the call is inbound, outbound, or Direct Agent Access.
   - **Subject**: Enter a subject or short description of the task.
   - **Description**: A note describing the task.

---

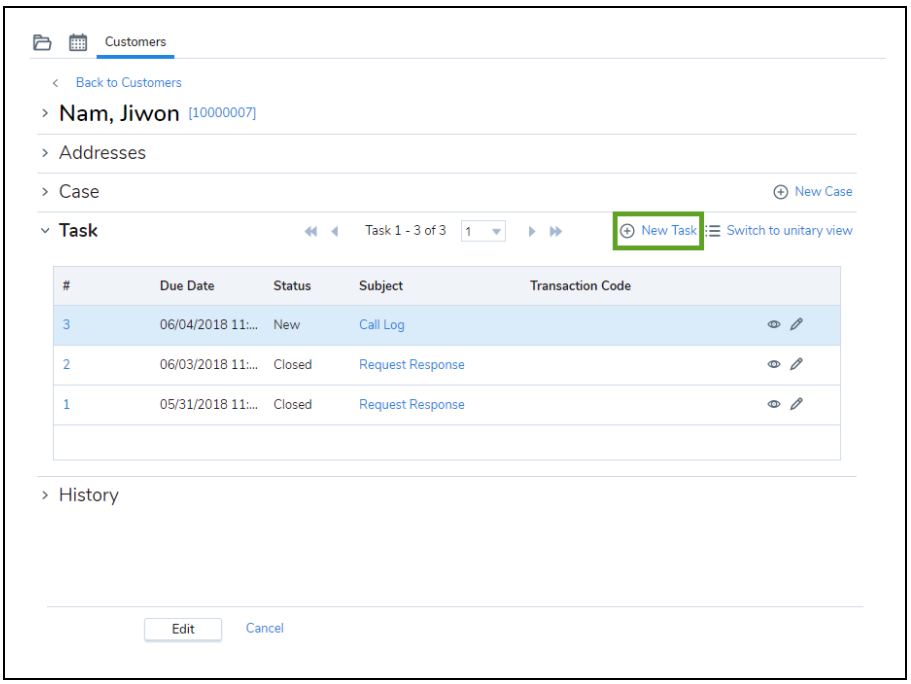
[1] A receptionist at a dental clinic uses tasks to create appointments. Once he creates an appointment for a family member through a task, he can copy the task to create appointments for the rest of the family. Agents can increase their efficiency using the clone feature, eliminating the manual work of entering data, and speeding up the process.

- **Enable Reminder**: Optionally, select the check box to set a reminder on the task. This option is enabled only if you specify a due date.

3. Click **Customers list** to associate it with an existing customer.
4. Click **Save**.
   You have created a task successfully.
   If you have selected **Enable Reminder** check box when creating the task, a reminder pops up at the specified time before the scheduled call.
5. Click the **Scheduled Call** to view the task details and the associated customer record.
   The reminder continues to pop up until the task is completed or dismissed. See Reschedule Campaign Calls.

To create a task for an existing customer

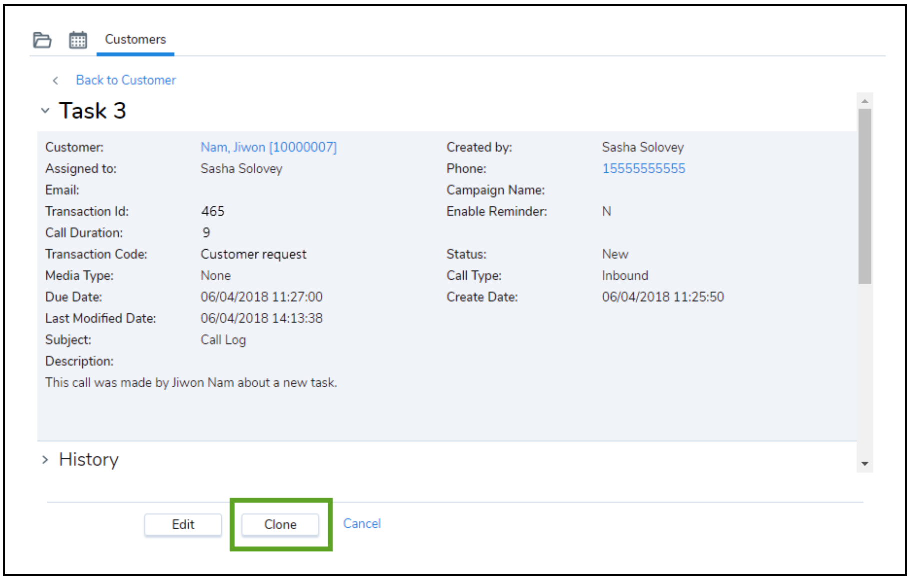
1. Open a customer record, and scroll down to the Task area.
2. Click **New Task**.



3. Enter the desired attributes to the new task.
   Note that the task is associated with the customer.
4. **Save** the task.

To clone a task

1. In Agent Console, click the **Tasks** tab.
   A list of your open tasks appears.
2. Open an existing task from the list.



Note: If you wish to create a new task, you need to save it first before being able to clone.

3. Click **Clone**.
   A confirmation window appears.
4. Click **OK** to confirm cloning.
   The page to edit the task opens with the information already populated.
   Note that the task number indicates if it is cloned from another task.
5. Click **Save**.
   The cloned task appears in the list.
   The new task shows the link to the original task.

Note: Deleting a task or a cloned task is available to agents only if they are granted the right privileges. Your confirmation is required to delete a parent task with a cloned child.

Manage Tasks

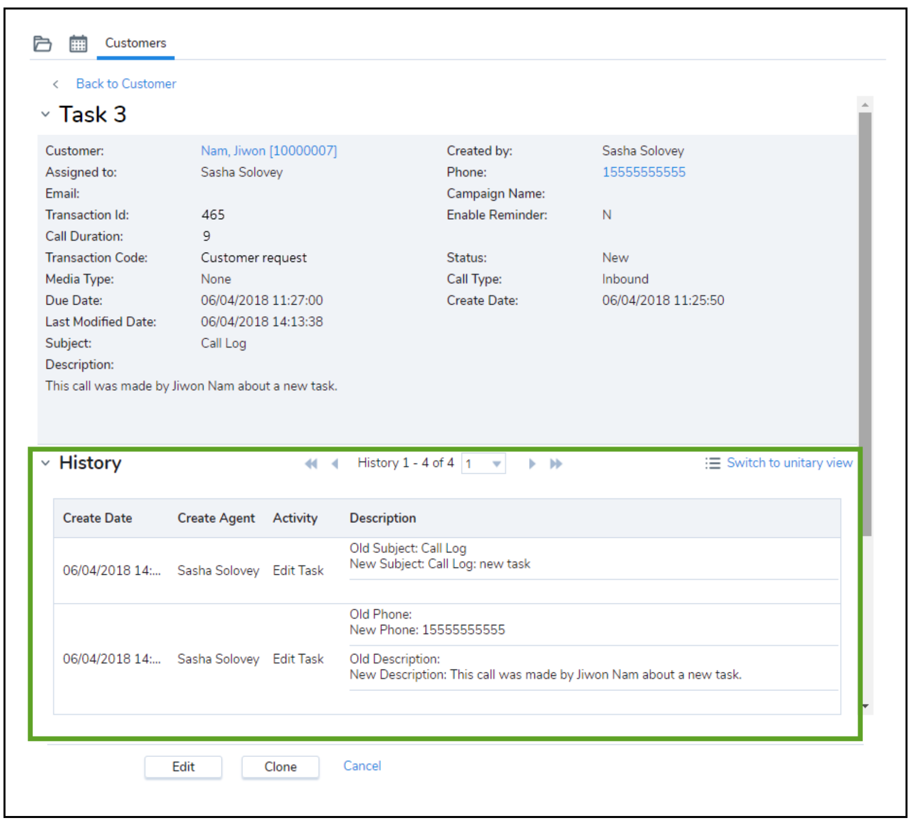
After you create and save a task, you can edit the information or delete a task record, provided that you have the delete and edit permissions. Contact your Virtual Contact Center administrator to inquire about your permissions.

To edit a task:

1. Click the **Tasks** tab. A list of tasks appears.
2. Click one of the actions items to view, edit, or delete the customer record.
   OR
   Select and open a task record from the list by clicking the task number. Click **Edit** at the bottom of the page.

View Task History

You can view the task history including the details and changes a task has gone through since its creation. Click Tasks tab or go to Tasks nested under the customer record.



List the Tasks of a Customer

You can list all tasks pertaining to a customer record.

To list all tasks:

1. Go to a customer record, and click **Tasks**.
   A list of all tasks associated with the customer record opens.
2. Click any record to view the task details.

Search CRM Data

The search feature in Agent Console allows you to search for customers, cases, and task records in your CRM based on specific criteria. You can perform a basic search on standard fields, or an advanced search based on any CRM field defined in a record. For example, you can search for a customer by last name or email address in a simple search. You can look for records based on multiple criteria, such as cases created in the last week in pending status. You can refine your search with a multitude of CRM search operators as described in the following table:

Search Operator	Description	Example
= equals	match the string exactly	Last Name = Hansen
=i equals (ignore case)	match the string exactly (case insensitive)	Last Name = hansen
> greater than	applicable to a numeric field. Search for a value greater than a specified value.	Case Number > 1200
< less than	applicable to a numeric field. Search for a value less than a specified value.	Case Number < 1200
>= greater or equal	applicable to a numeric field. Search for a value greater than or equal to a specified value.	Case Number >= 1200
<= less of equal	applicable to a numeric field. Search for a value greater than or equal to a specified value.	Case Number <= 1200
* contains	Search for a part of a word.	Case Subject * Delayed order
* i contains (ignore case)	Search for a part of a word (case insensitive)	Case Subject * delayed order
! not contains	Search for a record which does not contain a specified string.	Case Subject ! Sales

Search Operator	Description	Example
		Orders
!i not contains (ignore case)	Search for a record which does not contain a specified string. (case insensitive)	Case Subject !i sales orders
^ starts with	Search for a record which starts with a specified string.	Phone ^ 510
^i starts with (ignore case)	Search for a record which starts with a specified string. (case insensitive)	Phone ^i support
E empty	Search for a record where the field value is empty	Do not Call E
!E not empty	Search for a record where the field value is not empty	Phone !E
> after	Search for a record with a date value after a specified date.	Assign Date > 01/29/2012
< before	Search for a record with a date value before a specified date.	Assign Date < 01/29/2012
>= after (inclusive)	Search for a record with a date value after a specified date including the date.	Assign Date >= 01/29/2012
<= before (inclusive)	Search for a record with a date value after a specified date including the date.	Assign Date <= 01/29/2012

To perform a search for CRM data:

1. Go to the corresponding CRM object tab such as Customers, Tasks, or Cases.
2. Click **Search**.
3. Select your search parameters in the simple search. To perform an advanced search, click **Advanced**. Click **Search** for a customer, case, or task as desired. See more details on searching for customers, cases, and tasks.

Search for Customer Records

The customers are accessed from the Customers tab. By default, the Customers tab lists customers that are assigned to you. You can also access customer records that are:

- assigned to your group
- created by you

- in draft state
- all customer records

Note: The ability to view, create, edit, and delete customer records is available to you if your administrator grants the necessary privileges.

You can search and retrieve customer records using basic or advanced search.

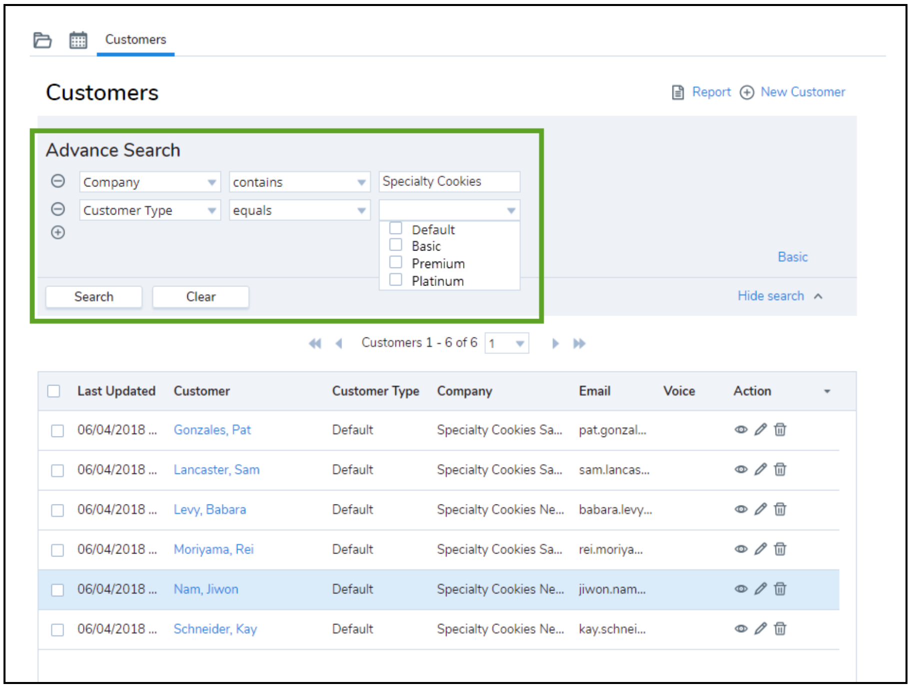
- **Basic Search**: Allows you to search for customers by last name and/or email address. Click **Search** to retrieve a list of all customers.

  To perform a basic search for customers:

  1. Click the **Customers** tab.
  2. Click **Search**.
     Agent Console displays the basic search interface.
  3. Click the **Search** button to retrieve all customer records.
     OR
     Perform either or both of the following, and click **Search**:
     - Enter a customer Last Name.
     - Enter a customer Email.

     A list of customer records matching the search criteria displays.

- **Advanced Search**: Allows you to search for customers by any field defined in the customer record. You can create nested queries by using the AND logical operator.
  Additionally, you can look for multiple values for a field. For example, to access all customers types, you can search for multiple values such as the default, premium, platinum and basic statuses.



Use the advanced search feature to search for a larger set of default and custom fields than are available in basic search. To perform an advanced search, click **Advanced** from the simple search window.

Search for Cases

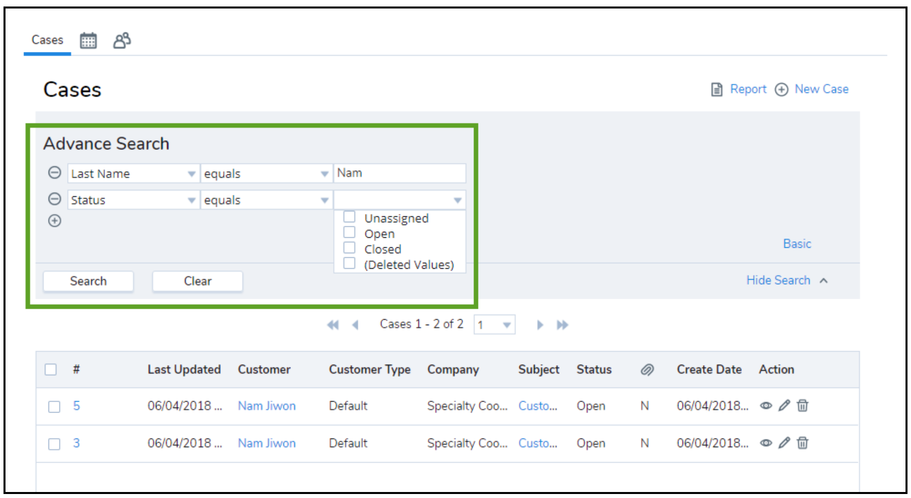
All cases are accessed from the Cases tab. By default, all cases assigned to you are listed. You can also access case records that are:

- assigned to you
- assigned to your group
- created by you
- all drafts

Note: The ability to view, create, edit, and delete case records is available to you if your administrator grants the necessary privileges.

You can search and retrieve case records by performing a basic or advanced search.

- **Basic Search**: Allows you to search for cases:
  - by case number
  - by case subject
  - created by specific agents or customers
  - assigned to specific agents or groups
- **Advanced Search**: Allows you to search for cases by any field defined in a case record. You can create nested queries by using the AND logical operator.
  Additionally, you can search for multiple values for a field. For example, to access all cases that are pending and in the open status, you can search for multiple values such as the open and pending statuses.



Use the advanced search feature to search for a larger set of default and custom fields than are available in basic search. To perform an advanced search, click **Advanced** from the simple search window.

Perform a Basic Search for Cases

To perform a basic search for cases:

1. Go to the **Cases** tab.
2. In the Display Panel under Cases, click **Search**.
   Agent Console displays the basic search interface.
3. Click **Search** to retrieve all cases.
   OR
   Perform any or all of the following, and click **Search**:

- Enter a case number.
- Enter a case subject.
- Select an agent or customer who created a case.
- Select an agent, or group to retrieve cases assigned to them.

A list of case records matching the search criteria displays.

Perform an Advanced Search for Cases

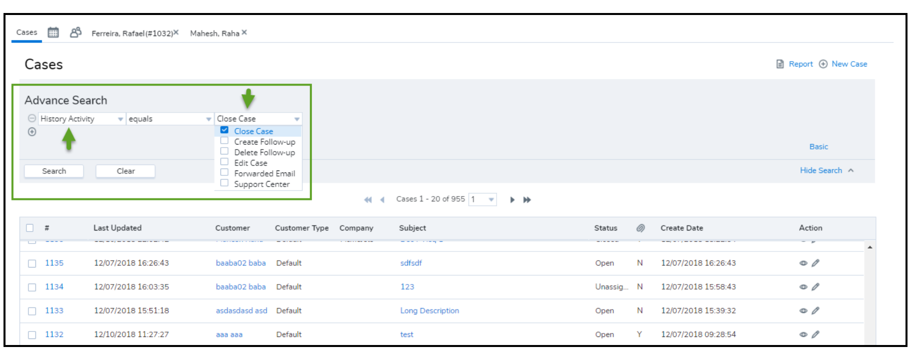
To perform an advanced search for cases:

1. Go to the **Cases** tab.
2. In the Display Panel under Cases, click **Search**.
   Agent Console displays the basic search interface.
3. Click **Advanced**.
4. Select one of the following search criteria and enter a valu:
   - Company, account, case number, category, media type, etc.
   - The case assigned date, created date, last activity date, etc.
   - Status, priority, severity, visibility, etc.
   - The history activity.

   A list of case records matching the search criteria displays.
5. Click **Search** to retrieve the cases.

Search for Closed Cases in History Activity

You can search the closed cases in History Activity. This feature helps supervisors investigate customer complaints regarding agent's lack of response. It particularly helps investigate a case that has been accidentally closed by an agent. For example, when processing related emails from a customer, an agent closes a case assuming it is related to the case he has reviewed. The unhappy customer may escalate the issue. With the improved search filter, the customer's complaint is now easier to track.



Features

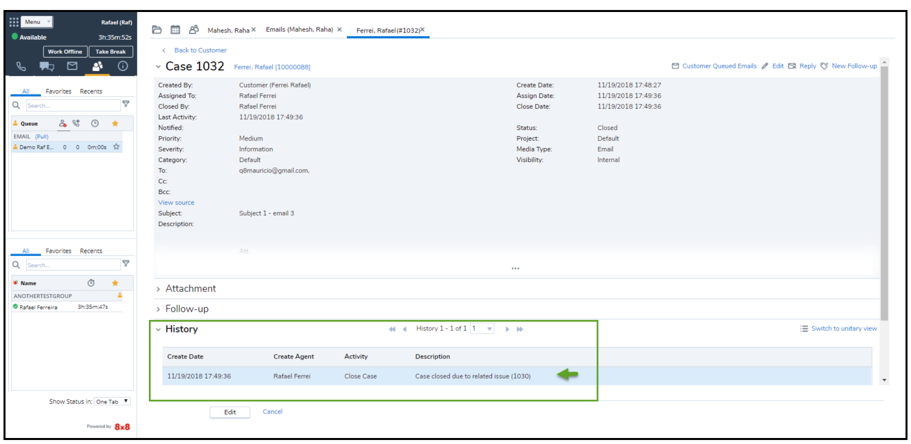
- Gives supervisors visibility on why the agent has closed the case.
- Improves customer experience by quickly addressing the issue.
- Facilitates tracking the closed cases.

Use Case

Let's say a customer sends three separate emails to AcmeJets customer service over a short period of time. Subject A and B are regarding an urgent support issue, but Subject C inquires about a sales order. Agent A reviews the customer's emails and crafts his response in a single email. He then closes the case for subjects A, B, and C, assuming that subject C is also related to this urgent issue. The customer escalates the matter after he does not hear from the agent. The case supervisor investigates the complaint and finds out that agent A has in fact closed this case along with other two cases (A and B).

To track closed cases:

1. Log in to Agent Console either as an agent or a supervisor.
2. Open **Cases**, and click **Advance Search**.
3. Select **History Activity** from the list.
4. Select the **Close Case** check box, and click **Search**. All closed cases are listed.
5. Open the case in question and check the **History** description. It shows the case is closed due to related issue (#).



Search for Tasks

All tasks are accessed from the Tasks tab. You can search and retrieve task records by performing basic or advanced search.

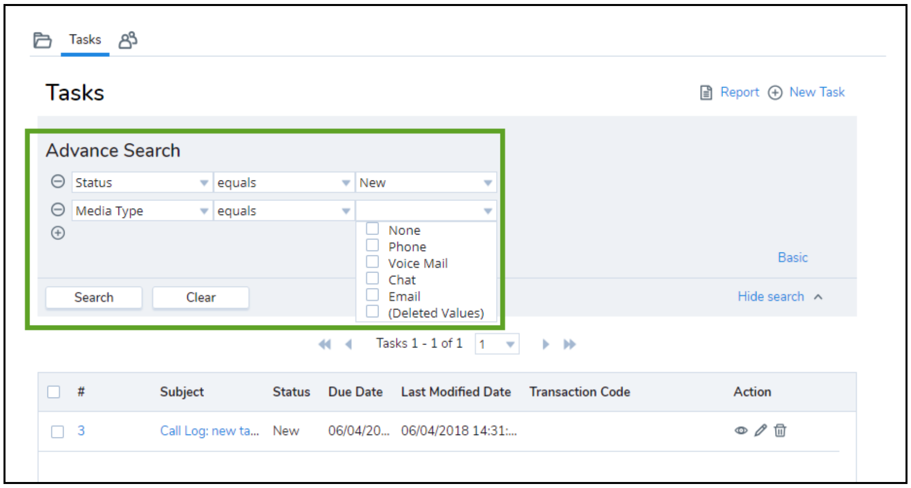
- **Basic Search**: Allows you to search for tasks:
  - by Task Number
  - by Task Subject
  - created by specific agents
  - assigned to specific agents

  To perform a basic search for tasks:

  1. Go to the **Tasks** tab.
  2. In the Display Panel under Tasks, click **Search**.
     Agent Console displays the basic search interface.
  3. Click the **Search** button to retrieve all tasks.
     OR
     Perform any or all of the following, and click **Search**:
     - Enter a task number.
     - Enter a task subject.
     - Select an agent who created a task.
     - Select an agent or group to retrieve tasks assigned to them.

  A list of task records matching the search criteria displays.

- **Advanced Search**: Allows you to search for tasks by any field defined in a task record. You can create nested queries by using the AND logical operator. Additionally, you can look for multiple values for a field. For example, to access all media types, you can search for multiple values such as the phone, chat, email, and voicemail statuses.



Use the advanced search feature to search for a larger set of default and custom fields than are available in basic search. To perform an advanced search, click **Advanced** link from the simple search window.

Delete CRM Data

You can delete customer, case, and task records from the Local CRM if your contact center administrator has granted the necessary permissions. If you do not have the permissions, you cannot delete data.

Before You Begin

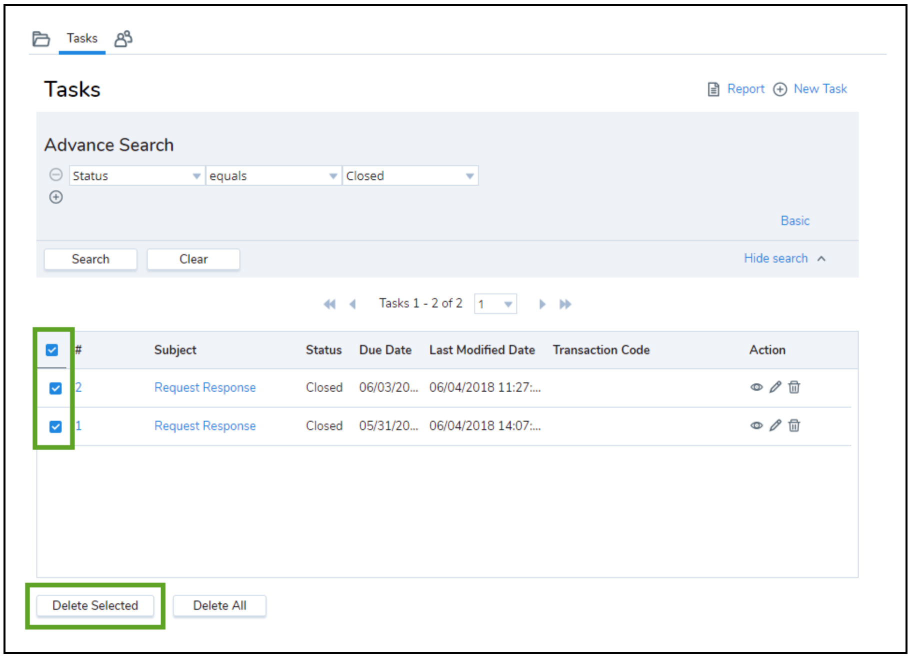
Before deleting CRM data, note that:

- Deleting a customer record permanently removes the customer information as well as all associated cases, follow-ups, and attachments.
- Deleting a case record permanently removes the case information as well as all associated follow-ups and attachments.
- You cannot restore any portion of deleted CRM records.

To delete CRM data:

1. Log in to Agent Console.
2. From the three CRM tabs (Customers, Cases, Tasks), select the object you wish to delete the data from. Based on your permissions, you can delete customers, cases, or tasks.
3. Click **Delete** next to the CRM record to delete records individually. You are prompted to confirm.
   OR

Click **Basic** or **Advanced Search** to search and retrieve the data records you wish to delete.



4. From the list, select desired records and click **Delete Selected**.
   A message indicates the number of records selected for deletion, and warns that all data associated with the records will be deleted as well.
5. Click **Ok** to proceed.
6. To delete all records:
   a. Click **Delete All**.
      You are prompted to enter your password to prevent accidental deletion.
   b. At the prompt, enter your password to log in to Agent Console.
   c. Click **Delete Now**.

Understand Your Rich Text Editor

If support for HTML email is enabled by your administrator in Configuration Manager, agents gain access to a rich text editor in the following pages of Agent Console:

- CRM Create Case
- CRM Edit Case (for non-read-only cases)

- CRM Create Follow-up
- CRM Notification of cases and follow-up records

The rich text editor is Unicode-compatible and fully localized.

The rich text editor in Agent Console allows you to create or edit cases and follow-up records with the following features:

- Rich font properties
- Insert images
- Insert hyperlinks
- Insert HTML-formatted FAQs
- Insert HTML-formatted signatures
- Easy-to-use spell checker

Menu Elements of the Rich Text Editor

If enabled by your administrator, the rich text editor in the Virtual Contact Center CRM lets you create or edit cases, and follow-up records with varying indent options, font types, font sizes, font styles, paragraph styles, and lists. The following table lists the name and role of each menu element in the rich text editor:

Element Name	Action	Values
Font Style: Bold	Set the font boldface attribute.	
Font Style: Italic	Set the font italic type.	
Font Style: Underlined	Underline the selected text.	
Font Style: Text color	Set the font text color.	
Font Style: Background color	Set the font background color.	
Paragraph Format	Set a paragraph style to the selected text.	Normal (default) Heading 1 Heading 2 Heading 3

Element Name	Action	Values
		Heading 4 Heading 5 Heading 6 Formatted Address Normal (DIV)
Font Name	Set the text font family.	(Default) Arial Comic Sans MS Courier New Georgia Lucida Sans Unicode Tahoma Times New Roman Trebuchet MS Verdana
Font Size	Set the text font size.	8, 9, 10, 11, 12, 13 (Default), 14, 16, 18, 24, 36
Font Style: Sub-script	Turn the selected text into a subscript.	
Font Style: Super-script	Turn the selected text into a superscript.	
Align Text	Position the text in the editor.	Left, Center, Right, Justify
List Style	Turn the selected text into a list.	Numbered list Bullet list Decrease indent level Increase indent level
Insert Item: HTML Link	Insert an HTML link.	URL to a web page
Insert Item: Image	Insert an image.	URL to a web image
Spell Checker	Check your spelling. While spell check is enabled, mis-	

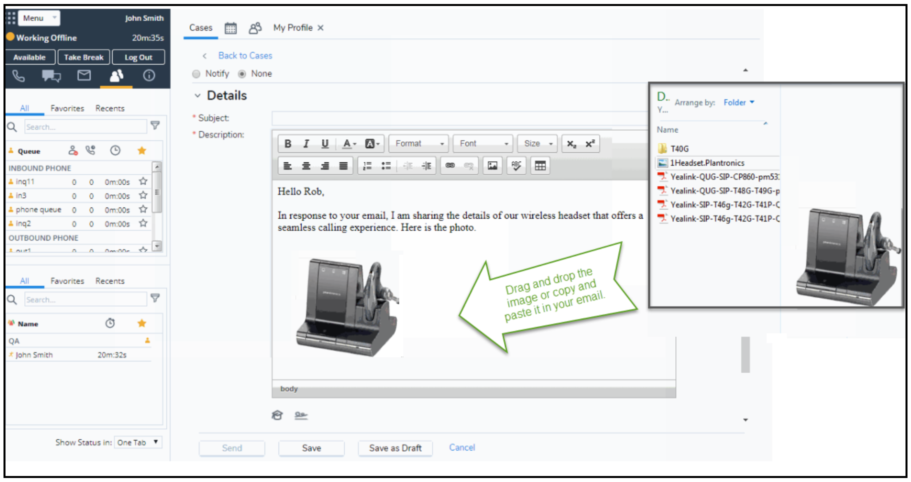
Element Name	Action	Values
	spelled text shows up as red.	
Insert Item: Table	Insert a table into your written text.	

Insert Images in Case Description

The CRM rich text editor enables you to insert images while creating cases and follow-up records. In the Description field, you can choose to insert an image by placing the cursor in the desired location.

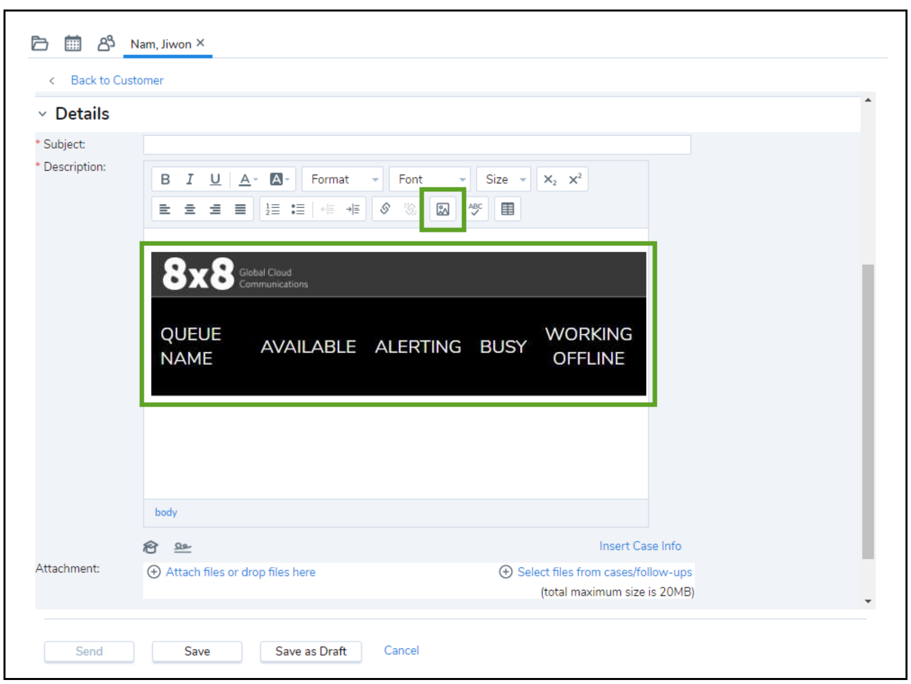
To insert an image in Case Description:

1. From the **Cases** tab, click **New Case** or create a new follow-up.
2. Enter the **Subject** and **Description**.
3. In the **Description** field, place the cursor where you want to insert an image.
4. Click  from the menu. You may be prompted to allow scripted windows by your browser. If prompted, click where instructed, and then click **Temporarily Allow Scripted Windows** in the contextual menu.
5. Click  again. The **Image Properties** dialog box opens, prompting for a valid image **URL**. Copy and past the URL link of the page or image you would like to insert 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. The maximum size allowed for image attachments is 20 MB. With drag and drop, you can add images up to a maximum size of 10 MB.



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.

6. Click **OK**. The image at the specified URL gets inserted in the description field. You can right-click the image and select **Open image in new tab**.

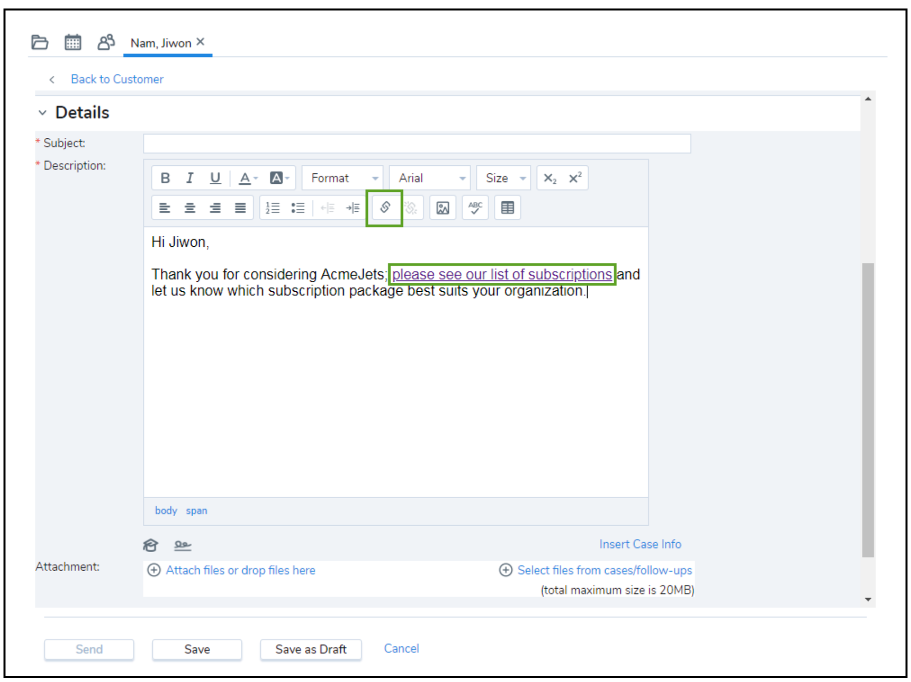


Insert Hyperlinks in Case Description

The CRM rich text editor enables you to insert hyperlinks while creating cases and follow-up records. In the Description field, you can choose to insert hyperlinks by selecting a text string and linking it to a valid URL. When you click on the linked text, the browser opens the hyperlink.

To insert a hyperlink:

1. From the **Cases** tab, click **New Case** or new follow-up.
2. Enter the **Subject** and **Description**.
3. In the **Description** field, select the text to be displayed as the hyperlink.
4. Click  from the menu. You may be prompted to allow scripted windows by your browser.
5. Click where instructed and then click **Temporarily Allow Scripted Windows** in the contextual menu.
6. Click  again. A dialog box opens, prompting for a valid link. You can link to a URL, an anchor in the text, or an email.
7. Enter a valid URL, and click **OK**. The link gets inserted in the description. If you click the linked text, a new browser opens the hyperlink.



Insert FAQs

Supervisors can create HTML-formatted frequently asked questions (FAQs) and save. Agents can send the existing FAQs to customers. If your contact center has prepared answers for FAQs, and those answers include shortcut definitions, you can use those shortcuts to quickly insert the prepared answers into chat responses, email responses, and email notifications while creating cases and follow-up records.

To insert an FAQ from the Cases tab

1. Go to the **Cases** tab.
2. Create a new case or new follow-up.
3. Place your cursor in the **Description** field where you wish to insert the FAQ.
4. Below the Description field, click to reveal your FAQ options.
5. You can enter an **FAQ shortcut** in the box that appears.
   OR
   Click **Browse** to select an FAQ from a list.
6. Enter or find the related FAQ, and click **Insert**.
7. Click **Send**, **Save**, or **Save as Draft**.

To insert an FAQ from the Chat window

1. During an active chat with the customer, enter an **FAQ shortcut** in the small text box above your main chat entry box.
   OR
   Click **FAQ>>** to select an FAQ from a list.
2. Click **Insert FAQ**.
   The FAQ content gets inserted in the response.

Insert Signatures in Case Description

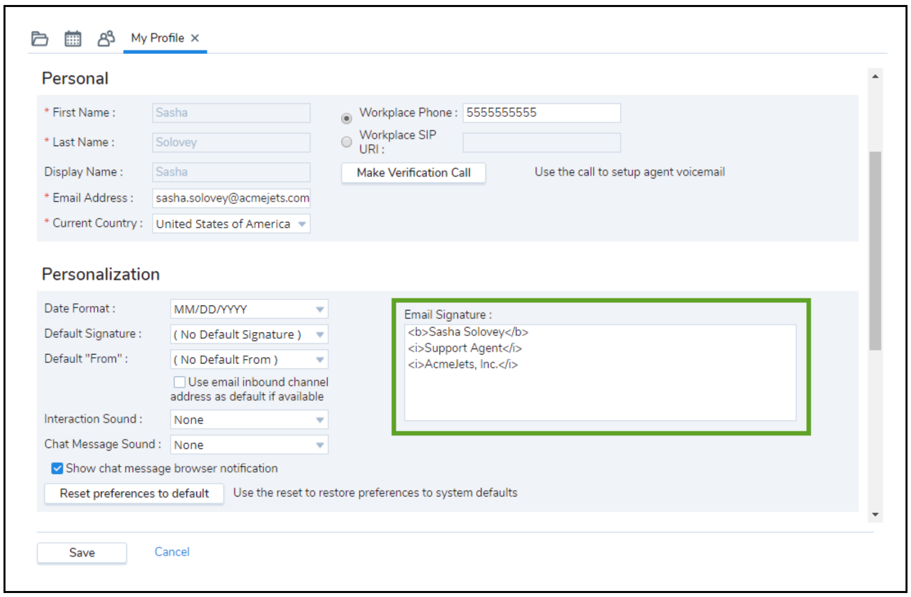
You can create elaborate HTML-formatted signatures to be rendered in the email notifications sent to customers by creating a signature in your profile, saving it, and inserting in the Description field of notification emails.

To create a signature:

1. Go to **Menu > Profile** in the Control Panel.
2. Under **Personalization**, create a signature using HTML tags.
   To create HTML tags you need to type a command before and after each line. Refer to the following table for most

common examples:

Command	Formatting Action
...	Bold Text
<i>...</i>	Italic Text
<u>...</u>	Underline Text
^{...}	Superscript: Smaller text placed below normal text
_{...}	Subscript: Smaller text placed below normal text
...	Small: Fine print-style text



3. Click **Save**.

To insert a signature in Case description:

1. Click to open or Edit a case or follow-up.
2. Under **Details**, place the cursor in the **Description** field where you wish to insert the signature.
3. Click **Insert Signature**.
   Your HTML formatted signature gets inserted in the email content.

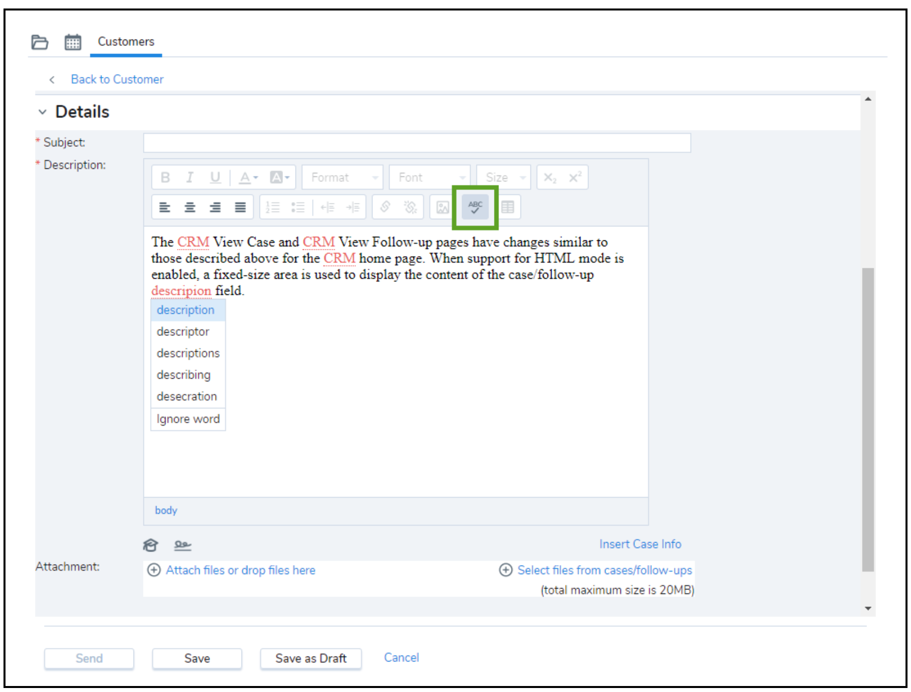
Check Spelling in Case Description

The spell checker in the rich text editor scans and flags the words that may be spelled incorrectly. The spell checker highlights all unknown words. You can replace a highlighted word with a suggestion, or ignore it.

Note: You do not have the option to ignore a suggestion in the context menu. You can simply ignore the words by not clicking on them.

To spell check your content in the Case Description:

1. Click to enable spell check and turn off text editing or text formatting mode. The spell checker marks all unknown words in red.
2. Click a highlighted word to open a pop-up window with a list of suggested words.



3. Replace the word with a suggestion, or ignore the word.
4. When all the spell checking is done, click to turn off spell check and return to the normal editing mode.

Create CRM Reports

Agents can use their Agent Console account to create and save CRM reports that summarize their customer and case activity. CRM reports can be viewed in a browser window. If your computer has Microsoft Excel installed, you can generate a report as an Excel spreadsheet.

Note: If enabled by your Virtual Contact Center administrator, as an agent, you can create or download custom reports to extract the desired customer data. You can always run a report even if the ability to download the report is disabled.

Refer to the following information on creating CRM reports:

- Create CRM Customer Reports
- Create CRM Case Reports
- Create CRM Task Reports

Create CRM Customer Reports

Note: If enabled by your Virtual Contact Center administrator, as an agent, you can create or download custom reports to extract the desired customer data. You can always run a report even if the ability to download the report is disabled.

To create a CRM Customer Report:

1. Go to the **Customers** tab.
2. In the header area, click **Report**.
   Agent Console displays the Customer Reports page.
3. In the **Customer Reports** page, click **New Report**.

   Agent Console walks you through the three-step New Report wizard.
   If your contact center administrator has added custom fields to your Local CRM, the custom fields appear in the list of fields.

4. In **Step 1** of the New Report wizard:
   a. In the **Report Title** text entry area, enter the name of the report.
   b. Select a vertical or horizontal layout.
   c. In the **Fields to Include** area, select the fields to be included in the report.
   d. Click **Next**.
      Agent Console displays the next step in the wizard.
5. In **Step 2** of the New Report wizard, for each customer field you chose in Step 1, create optional filtering statements.
   a. For each report field, choose a logical operator, then in the adjoining text entry area type (or if applicable, select) a filter.
   b. Click **Next**.
      Agent Console displays the next step in the wizard.
6. In **Step 3** of the New Report wizard, perform the following:
   - Specify a company from the existing list of customer base by clicking **Search**.
   - Choose the primary and secondary report fields Agent Console uses to order the data contained in the customer report, and choose the sort order of the two fields.
7. Produce and save the report. Perform one of the following:
   - To save the report configuration without running the report, click **Save**.
   - To run the report without saving the report configuration, click **Run**.
   - To save the report configuration and run the report, click **Save and Run**.
   - If the agent computer has Microsoft Excel installed, to produce the report in the agent computer's Microsoft Excel program without saving the report configuration, click **Run in Excel**.
     After Agent Console produces the report in Excel, click **Save** in the New Report wizard to save the report configuration.

Create CRM Case Reports

Note: If enabled by your Virtual Contact Center administrator, as an agent, you can create or download custom reports to extract the desired customer data. You can always run a report even if the ability to download the report is disabled.

A CRM case report provides both customer and case information. The customer-related fields can be used to filter report data, and appear in the Case, Follow-Up, and Attached fields.

Note: The Description field displays only the first 256 characters on reports.

Virtual Contact Center provides three preset reports by default. You cannot edit these reports, but you can create a new report.

- Internal Case Report
- supervisor Case Report
- Management Case Report

To run a default CRM Case Report:

1. Go to the **Cases** tab.
2. In the header area, click **Report**.
   Agent Console displays the **Case Reports** page.
   The Case Reports list contains three default case reports:
   - Internal Case Report
   - supervisor Case Report
   - Management Case Report
3. To run one of the default reports, select a date range and click **Run** next to the desired default report. If you want to create your own report, follow the steps below.

To create a new CRM Case Report:

1. In the **Case Reports** page, click **New Report**.

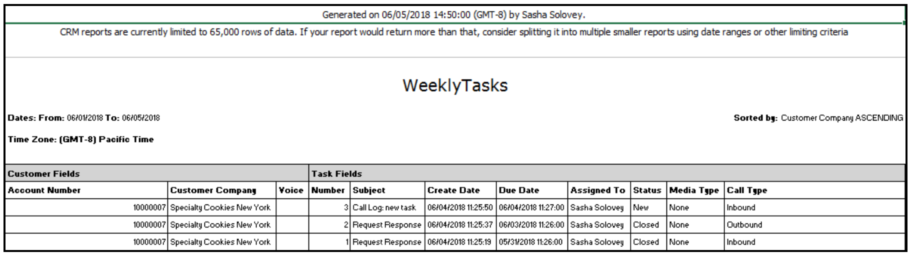
   Agent Console walks you through the three-step New Report wizard.
   If your contact center administrator has added custom fields to your Local CRM, the custom fields appear in the list of fields.
2. In **Step 1** of the New Report wizard:
   a. In the **Report Title** text entry area, type the name of the report.
   b. Select a vertical or horizontal layout.
   c. In the **Fields to Include** area, select the fields to be included in the report.

   d. Click **Next**.
      Agent Console displays the next step in the wizard.
3. In **Step 2** of the New Report wizard, for each customer and case field you chose in Step 1, create optional filtering statements.
   a. For each report field, choose a logical operator, then in the adjoining text entry area type (or if applicable, select) a filter.
   b. Click **Next**.
      Agent Console displays the next step in the wizard.
4. In **Step 3** of the New Report wizard, perform the following:
   - Specify the date range for the report.
   - Choose the primary and secondary report fields Agent Console uses to order the data contained in the case report, then choose the sort order of the two fields.
5. Produce and save the report. Perform one of the following:
   - To save the report configuration without running the report, click **Save**.
   - To run the report without saving the report configuration, click **Run**.
   - To save the report configuration and run the report, click **Save and Run**.
   - If the agent computer has Microsoft Excel installed, to produce the report in the agent computer's Microsoft Excel program without saving the report configuration, click **Run in Excel**.
     After Agent Console produces the report in Excel, click **Save** in the New Report wizard to save the report configuration.

Create CRM Task Reports

Note: If enabled by your Virtual Contact Center administrator, as an agent, you can create or download custom reports to extract the desired customer data. You can always run a report even if the ability to download the report is disabled.

You can extract specific task information by generating customized task reports. Agent Console allows you to create a custom task report in just three simple steps using a wizard. The reporting wizard allows you to select the specific data you wish to report on. For example, you can generate a report to summarize the tasks generated in a particular month.



Generated on 06/05/2018 14:50:00 (GMT-8) by Sasha Solovey.

CRM reports are currently limited to 65,000 rows of data. If your report would return more than that, consider splitting it into multiple smaller reports using date ranges or other limiting criteria

WeeklyTasks

Dates: From: 06/01/2018 **To:** 06/05/2018

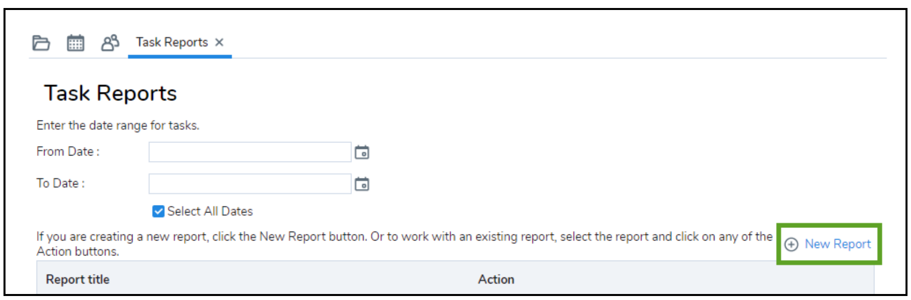
Sorted by: Customer Company ASCENDING

Time Zone: (GMT-8) Pacific Time

Customer Fields			Task Fields							
Account Number	**Customer Company**	**Voice**	**Number**	**Subject**	**Create Date**	**Due Date**	**Assigned To**	**Status**	**Media Type**	**Call Type**
10000007	Specialty Cookies New York		3	Call Log: new task	06/04/2018 11:25:50	06/04/2018 11:27:00	Sasha Solovey	New	None	Inbound
10000007	Specialty Cookies New York		2	Request Response	06/04/2018 11:25:37	06/03/2018 11:26:00	Sasha Solovey	Closed	None	Outbound
10000007	Specialty Cookies New York		1	Request Response	06/04/2018 11:25:19	05/31/2018 11:26:00	Sasha Solovey	Closed	None	Inbound

To generate a report for tasks:

1. Go to the **Tasks** tab.
2. in the header area, click **Report**.
   Agent Console displays the Task Reports page.
3. in the **Task Reports** page, click **New Report**.

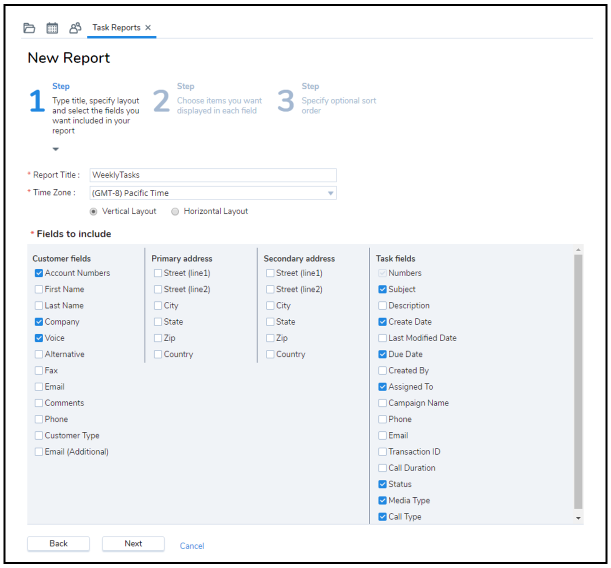


Agent Console walks you through the three-step New Report wizard.

If your contact center administrator has added custom fields to your Local CRM, the custom fields appear in the list of fields.

Note: To edit an existing report, select the report from the drop-down list of **Task Reports**, and click **Edit**.

4. In **Step 1** of the New Report wizard:



a. In the **Report Title** text entry area, type the name of the report.

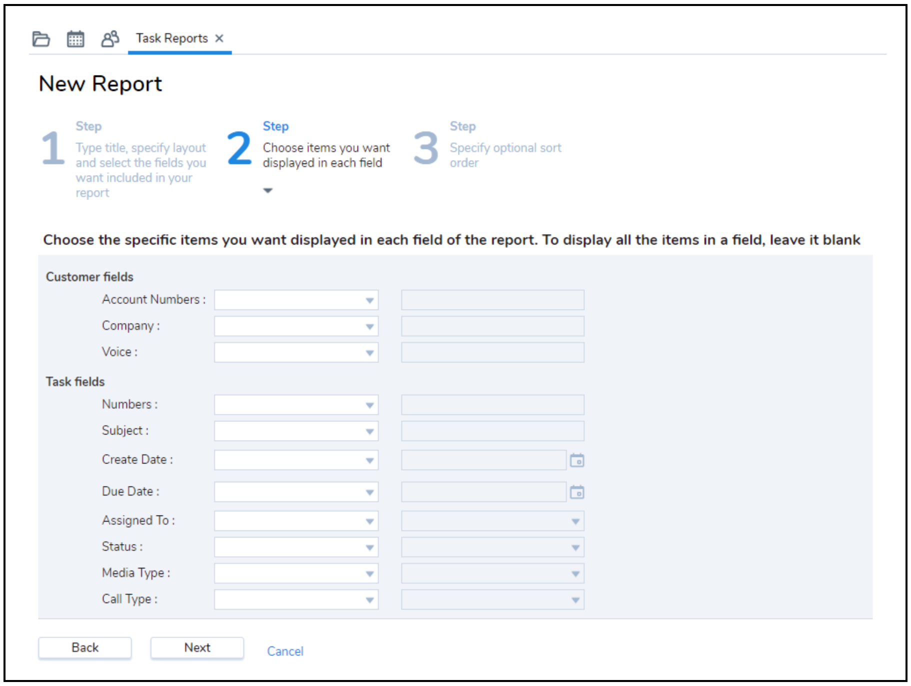
b. Select a vertical or horizontal layout.

c. In the **Fields to Include** area, select the fields to be included in the report.

d. Click **Next**.

   Agent Console displays the next step in the wizard.

5. In **Step 2** of the New Report wizard, for each customer field you chose in Step 1, create optional filtering statements.

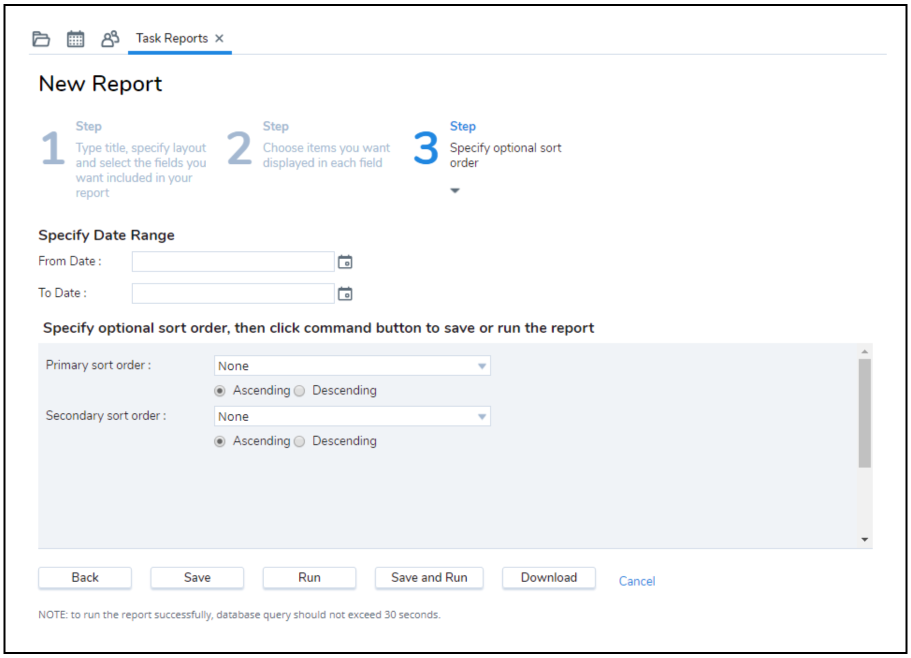


a. For each report field, choose a logical operator, then in the adjoining text entry area type (or if applicable, select) a filter.

b. Click **Next**.

   Agent Console displays the next step in the wizard.

6. In **Step 3** of the New Report wizard, perform the following:



- Specify the date range for the report.
- Choose the primary and secondary report fields Agent Console uses to order the data contained in the case report, then choose the sort order of the two fields.

7. Produce and save the report. Perform one of the following:
   - To save the report configuration without running the report, click **Save**.
   - To run the report without saving the report configuration, click **Run**.
   - To save the report configuration and run the report, click **Save and Run**.
   - If the agent computer has Microsoft Excel installed, to produce the report in the agent computer's Microsoft Excel program without saving the report configuration, click **Run in Excel**.
     After Agent Console produces the report in Excel, click **Save** in the New Report wizard to save the report configuration.

Post and View Notification Messages

Agents can use Agent Console to send notification messages or notices to their own agent group.

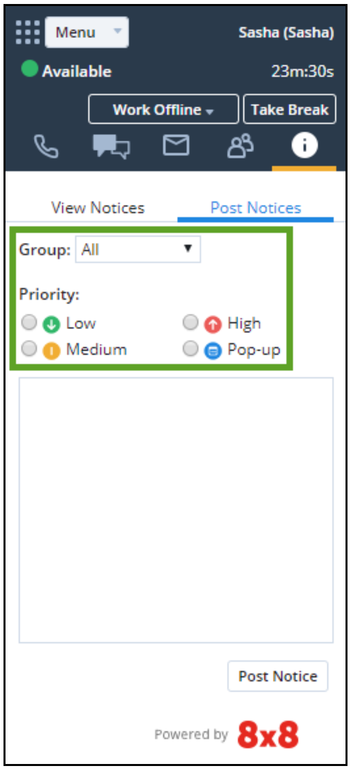
All agents in the selected agent group receive the notice. Agents logged in to Agent Console receive the notice immediately. Agents who are not logged in receive the notice the next time they log in to Agent Console. You can see the Notices tab blinking red only if it is not in focus.

Send Notification Messages

As an agent you may need to send a notification message or notice to your agent group. It is a fast and convenient way to provide a warning or send a general message to other agents in the same tenant.

To send a notice:

1. In Agent Console, go to the **Notices** tab.
2. Click the **Post Notices** tab.



3. In the **Group** list, select your agent group, or select **All** if you are a supervisor and want to send the notice to all your agent groups.
   You must select at least one agent group before you can send the notice.
4. In the **Priority** area, select the priority level of the message, or select **Pop-up**.

> **Note:** If you select Pop-up, Agent Console displays the notice as a pop-up message that disables all recipients' tools until the agent selects the message box and clicks **Close**.

5. Click **Post Notices** to send the notice.

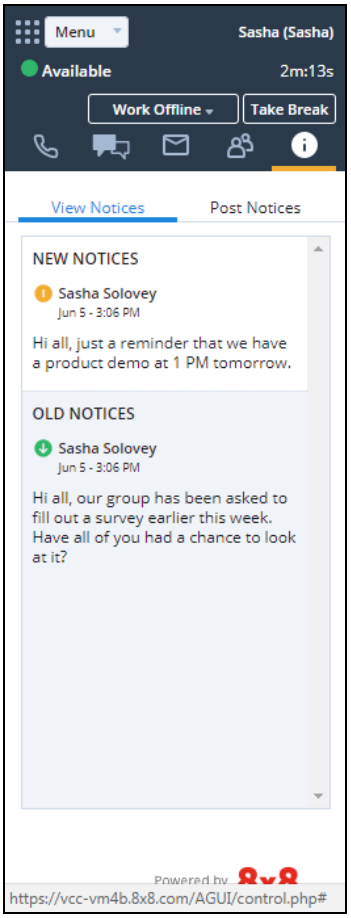
View Notification Messages

Agents can view the broadcast or notification messages sent by their supervisor or other agents in Agent Console. The Notices tab blinks red if you are logged in to Agent Console but working in another tab. If you are in Notices tab, go to View Notices to see the new or old messages.

To view a notification message:

1. In Agent Console, select the **Notices** tab.
2. Click **View Notices**.
   You can view the unread notices in this page. The notices are coded with colors based on their priority. Green shows low priority, yellow shows medium, and red shows high priority messages.

The Old Notices section retains your previously-viewed notices until you log out of Agent Console. If the sender has selected the pop-up option for the message priority, a notification window appears. The pop-up notice disables all recipients tools until you select the message box and click **Close**.



Broadcast Message During a Platform Switch

During a platform switch, agents receive a broadcasting message informing them of the 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 during the platform switch as they may experience some instability.

Use the Collaborate Feature

If your Agent Console account includes the Collaborate desktop sharing tool, you can use this feature to connect to a customer's computer and directly control that computer to provide hands-on assistance. When you use Collaborate to connect to a customer's computer, the customer sees every action you perform in real time. The customer can disconnect their computer from the Collaborate session at any time.

Contact your contact center supervisor to verify that your computer and network configuration permits the use of the Collaborate feature.

To use the Collaborate feature, you need to perform the following high-level tasks:

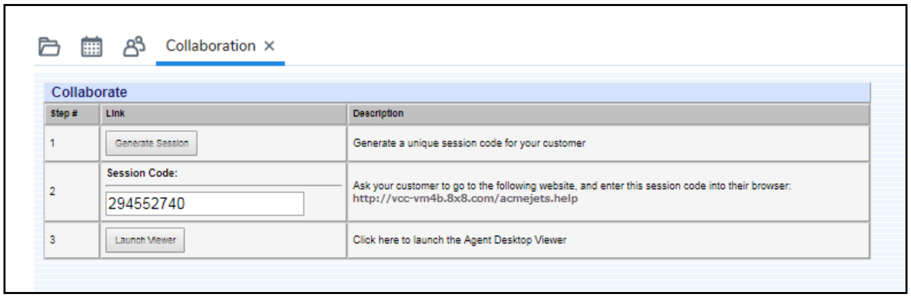
1. From the **Menu** drop-down of the Control Panel, open the **Collaborate** page to generate a unique Collaborate session identifier.
2. Send the Collaborate session identifier and the URL of the Collaborate web page to the customer, then help the customer connect to the Collaborate session.
3. Use the Collaborate feature to connect to the customer's computer.
4. Once connected, use the Collaborate feature to provide hands-on assistance.

Establish Collaborate Sessions

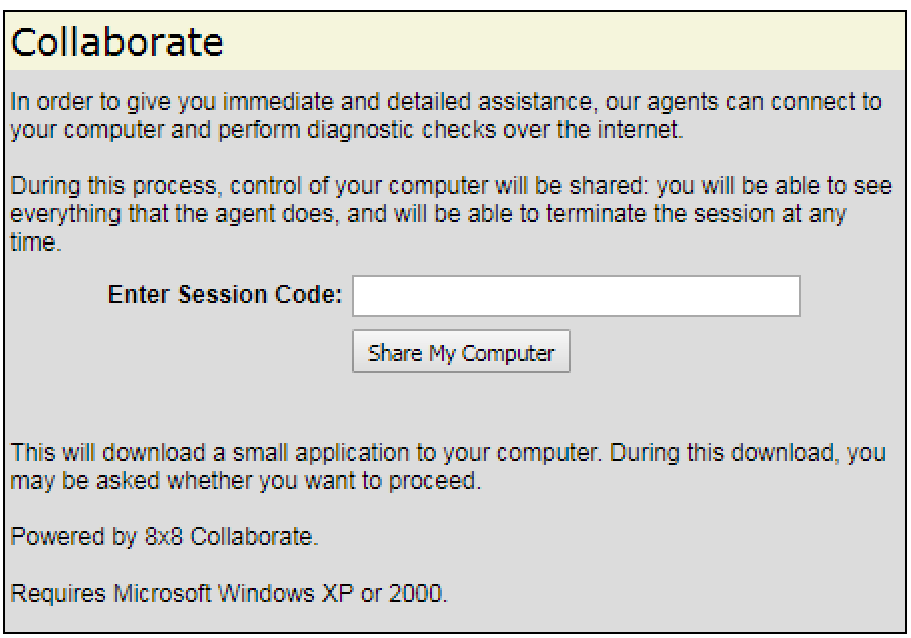
Perform the following procedure to establish a Collaborate session.

To establish a Virtual Contact Center Collaborate session:

1. Click **Collaborate** from the **Menu** drop-down of the Control Panel.
   Agent Console displays the Collaborate page.



2. In the **Collaborate** page, click **Generate Session**.
   Agent Console creates a unique Collaborate session code and places the code in the Session Code text entry area.
   To the right of the Session Code text entry area, Agent Console lists the URL of the Collaborate web page.
3. Help the customer connect to the Collaborate session.
   a. Communicate the URL of the Collaborate web page and the unique Collaborate session code to the customer.
      You can use phone, chat, or email to provide the customer with the information they need to connect to the Collaborate session.
   b. After the customer connects to the Collaborate web page, direct the customer to paste the Collaborate session code into the **Enter Session Code** text entry area and click **Share My Computer**.



c. When the customer is prompted to run or save the program file downloaded by the Collaborate feature, direct the customer to click **Run**.

   If the customer receives an additional warning that the program's publisher could not be verified, direct the customer to click **Run** again.

d. When the Collaborate session prompts the customer to accept or reject the Collaborate session, direct the customer to click **Yes**.

e. Point out to the customer that they can click Disconnect Now in their Collaborate session to immediately end the session.

4. In Agent Console, in the **Collaborate** page, click **Launch Viewer**.

   Agent Console creates a new browser session, then connects that session to the customer's computer. You can now use the Collaborate session to directly control the customer computer to provide hands-on assistance.

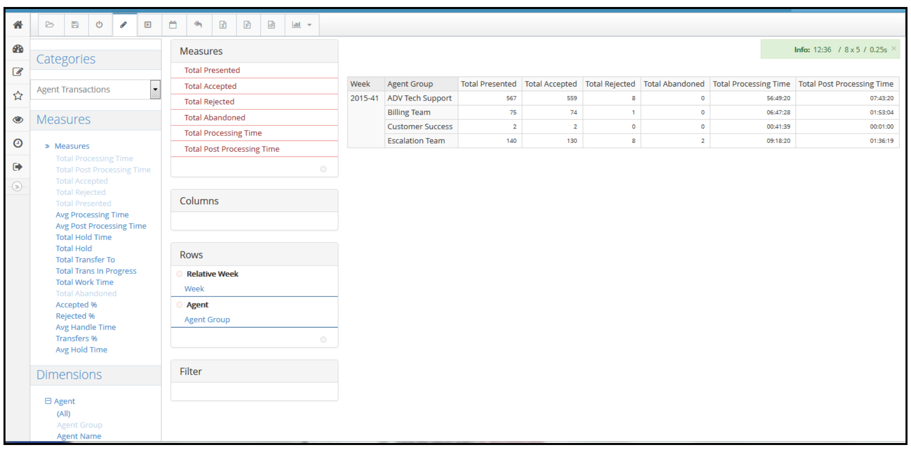
5. To end the Collaborate session, click **Disconnect** in your session window.

   You can also direct the customer to click **Disconnect Now** in their Collaborate session.

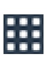
Access Virtual Contact Center Analytics

Supervisors and agents can launch 8x8 Virtual Contact Center Analytics from Agent 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. As an agent, you can see your performance metrics and assess your productivity. For example, you can answer questions such as: How many calls have I answered this week? Or, What was my average processing time in the last month?

Using Virtual Contact Center Analytics, you can see information such as total number of transactions presented to the agent, the total number of accepted, rejected, or abandoned calls, total processing time, and so on.

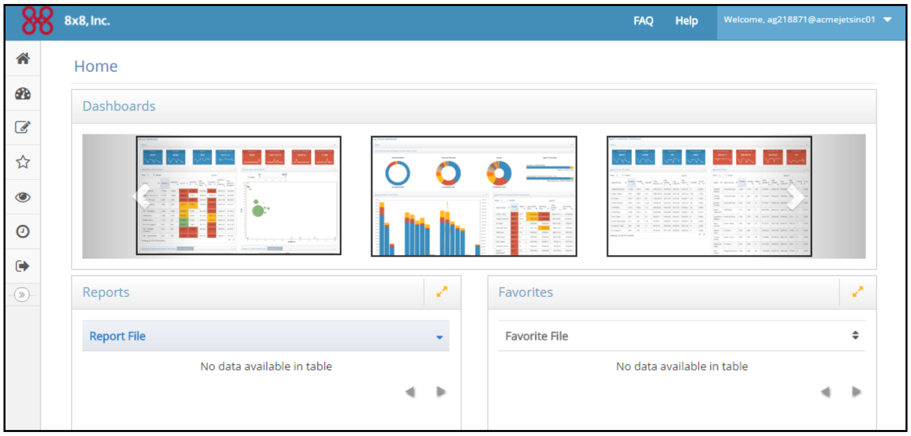


To access Virtual Contact Center Analytics:

1. Log in to Agent 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.



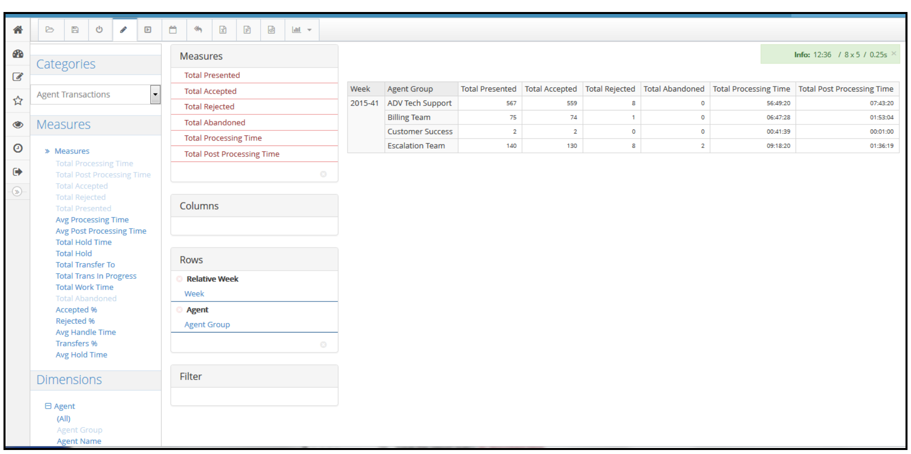
4. Use the navigation menu on the left to access dashboards and create custom reports.

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.



Customer Experience Overview

Customer Experience provides contact center agents with an interaction overview specific to the agent, as well as an overview of the caller's experience once the call enters the contact center. It shows a detailed view of the recent calls with full filtering options, helping agents assess and improve their performance and quickly find the call detail information.

An agent can launch 8x8 Customer Experience from Agent Console, eliminating the need for a separate login.

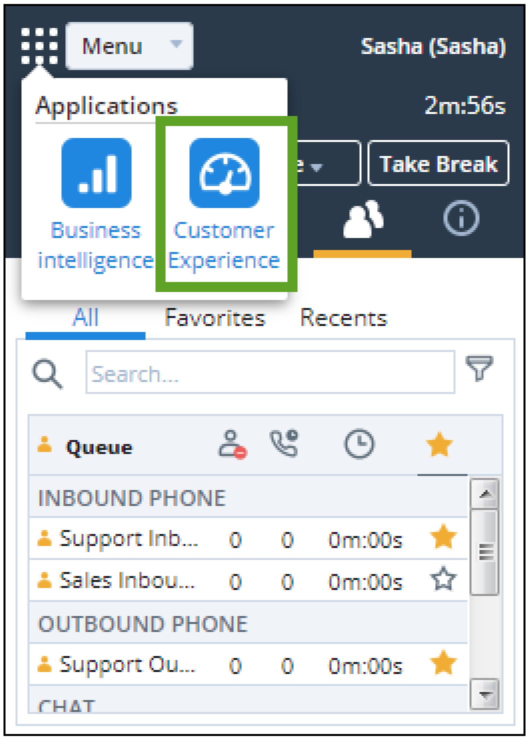
Features

- Gives insight into the interactions handled by agents such as call type and direction, call duration, caller name, and more, inside Virtual Contact Center.
- Presents a graphical view of the complete caller journey from the time it enters the contact center until the time the call is terminated.
- Allows for advanced search of all interactions such as inbound and outbound calls, agent or system-generated calls, and more.
- Allows you to download interactions data in Excel and PDF format.

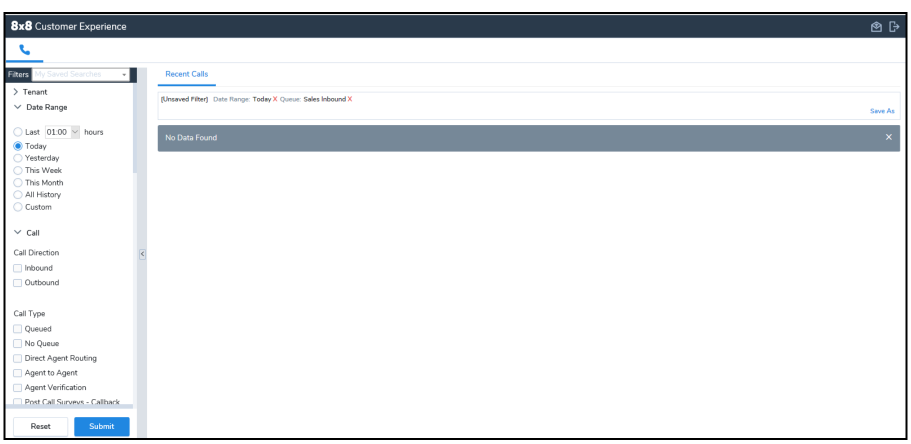
Log In

To access Customer Experience in Virtual Contact Center:

1. Log in to Agent Console.
2. Click the **Application Selector** in the Control Panel.



3. Select **Customer Experience**.
   The dashboard launches in a separate browser window.



Access Recent Calls

In Customer Experience, agents can filter by channel, queue, agent, time, etc. to get a detailed view of their recent calls. They can answer questions such as the type and direction of the call, who answered the call, how long the call remained in the queue, whether the call was hung up by caller, agent or the system, how long the call was on hold, caller's phone number, name, and much more.

Use Cases

As a contact center agent, you can find:

- **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.

Use Case 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. The following steps show how to achieve such results:

To track the number of transfers:

1. In Customer Experience, 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.

Access and Download Recent Calls

You can not only filter by channel, queue, agents, etc. and view the details of your recent calls, but also download it on PDF or Excel and save for future references.

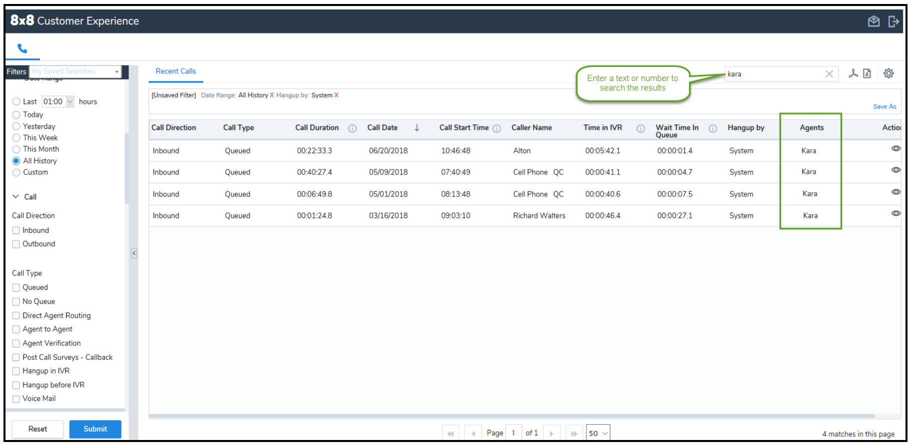
To access and download your recent calls:

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. See the Recent Calls available filters.

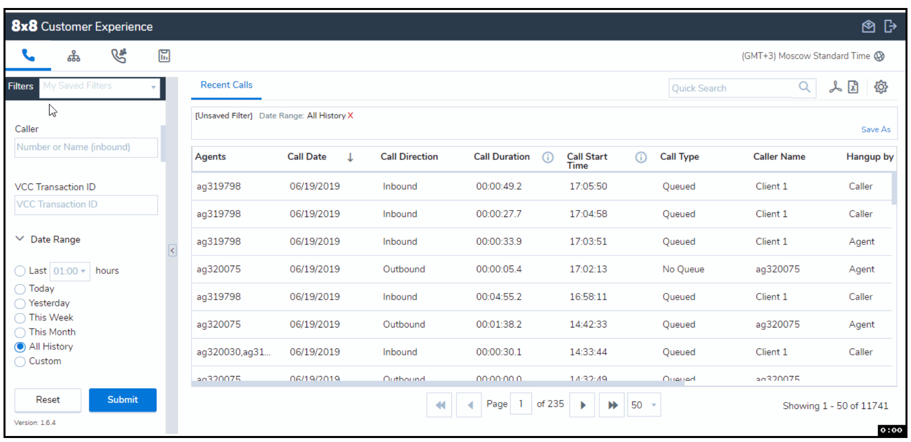
   Note: For a faster search, save your filters and apply them the next time you need.

3. Click to show or hide **Column Settings**. See the available fields in column settings.

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



5. The data appears according to the tenant's default timezone. Click and click to change the timezone.



6. 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.

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

Available Filters For Recent Calls

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. ■ **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.

Available Filter Groups	Description
	▪ **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. ◦ 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.

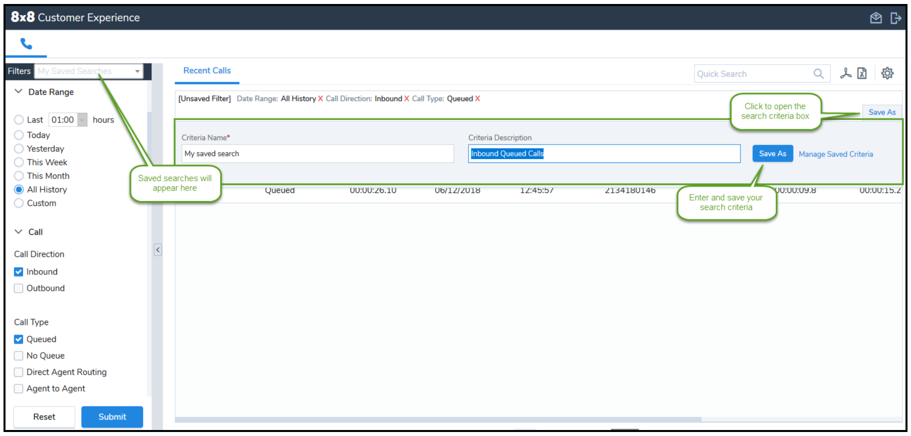
Available Filter Groups	Description
	◦ Track spam calls coming into the call center. ◦ Detect poor response from the call center agents, whether the issue was resolved after the first call, or the agent lacked the knowledge to resolve the issue. ◦ Whether the callback option was effective. ◦ Whether 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. This shows the total wait time before connecting to an agent, and includes the time spent in multiple queues (such as if a call was transferred to multiple queues). ■ **Time in IVR**: Enter the amount of time a call or transaction spent in IVR before it was routed to a queue or agent. This includes the time spent in multiple IVR menus. ■ **Transfer Count**: Select a range count on the number of times a call was transferred.
Agent Calls	■ **Call Duration**: Filter the time agents spent handling 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 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.

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. If you want to include all calls in the day, you must set the ending time to the end of the day (either select 23:45, or manually enter 23:59).

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.

Column Settings Fields

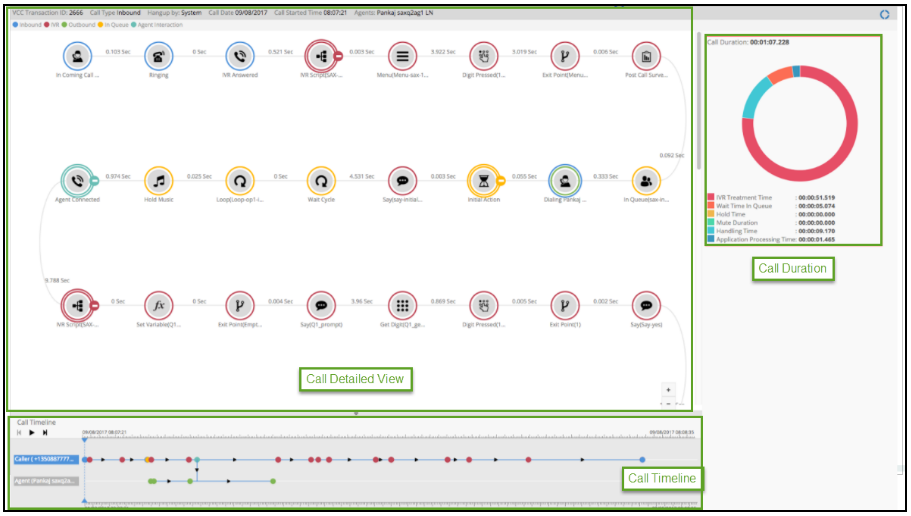
To return to the default column view, select **Reset to Default**. To go back to Recent Calls, click outside the column settings. The selected settings are applied.

Fields	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 received or rejected the call, or was unable to answer it. ■ **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).

Fields	Description
	■ **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.

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.
- **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 and related queues:

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.

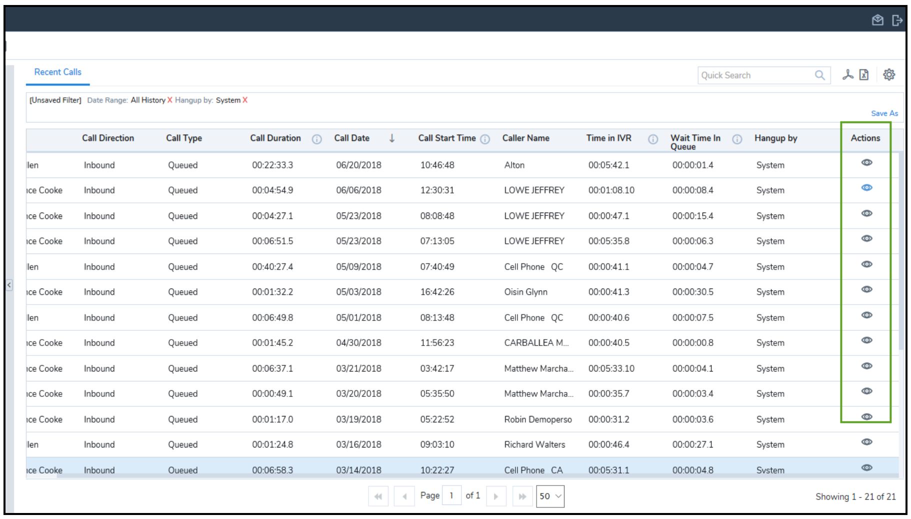
The following table shows different groups of icons in a Call Flow, designated by colors. Each icon represents an event or activity that is taking place during the call. Hover over or click each icon to see an information box. The IVR events can be collapsed and expanded by clicking + or - next to the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

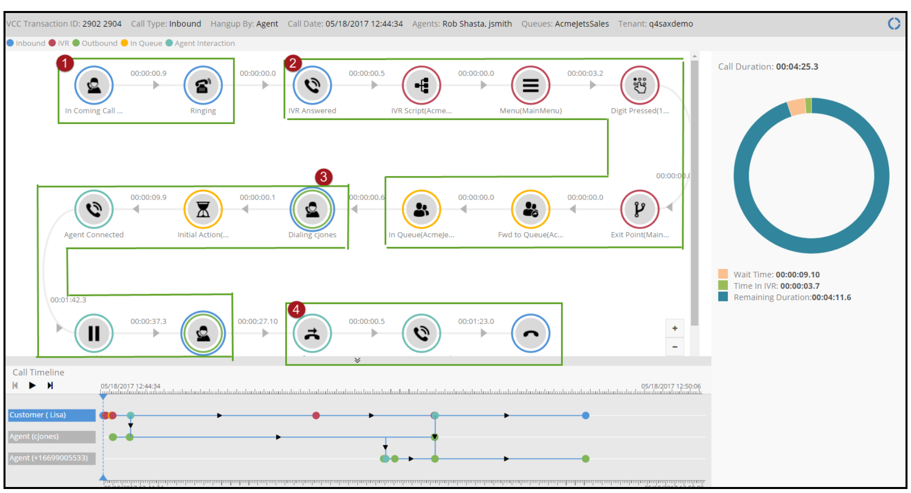
1. In the Customer Experience dashboard, click to open **Recent Calls**.

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.

FAQ

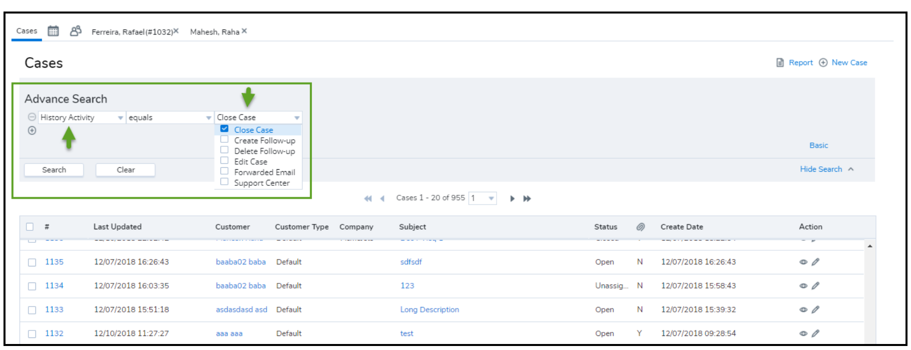
Refer to the following frequently-asked questions for more information:

Why is my access to Agent Console is denied?

If your access to Agent Console is being 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.

How do I search for closed cases in history activity?

Supervisors can investigate customer complaints regarding agents lack of response using a new filter. The new History Activity filter helps investigate a case that has been accidentally closed by an agent. As an example, when processing related emails from a customer, an agent closes a case assuming it is related to the case he has reviewed. The unhappy customer may escalate the issue. With the improved search filter, the customer's complaint is now easier to track.



Features

- Gives supervisors visibility on why the agent has closed the case.
- Improves customer experience by quickly addressing the issue.

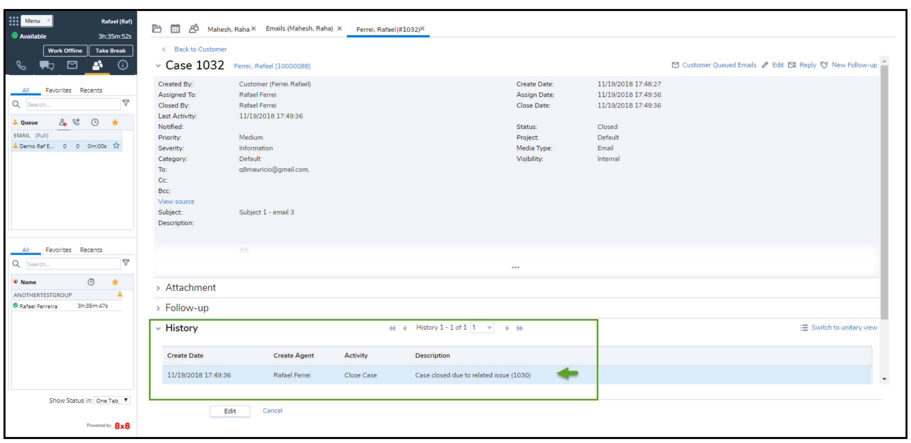
- Facilitates tracking the closed cases.

Use Case

Let's say a customer sends three separate emails to AcmeJets customer service over a short period of time. Subject A and B are regarding an urgent support issue, but Subject C inquires about a sales order. Agent A reviews the customer's emails and crafts his response in a single email. He then closes the case for subjects A, B, and C, assuming that subject C is also related to this urgent issue. The customer escalates the matter after he does not hear from the agent. The case supervisor investigates the complaint and finds out that agent A has in fact closed this case along with other two cases (A and B).

To track closed cases:

1. Log in to Agent Console either as an agent or a supervisor.
2. Open **Cases**, and click **Advance Search**.
3. Select **History Activity** from the list.
4. Select the **Close Case** check box, and click **Search**. All closed cases are listed.
5. Open the case in question and check the **History** description. It shows the case is closed due to related issue (#).



GLOSSARY