# 8x8 Telephone Answering Service for Regus

The 8x8 Telephone Answering Service (TAS) for Regus offers centralized call-handling capabilities for Regus agents. The centralized call handling for Regus allows Regus to channel all calls to their Telephone Answering Service managed by call center agents.

Overview

Regus assigns its customers to multiple PBXs, or branches within a PBX. At Regus Telephone Answering Service, a receptionist answers the inbound calls and directs them to a contact from the company directory. The receptionist at the Telephone Answering Service identifies the company via screen pop and greets the caller accordingly, giving caller the impression that the call is received by the company receptionist. The receptionist also peviews all contacts belonging to the company in the screen pop. She can transfer the call (blind or warm) to the desired company contact. The company contact with the Virtual Office extension accepts the call on the extension, or receives a voicemail. The caller ID of the original caller is relayed to the company contact.
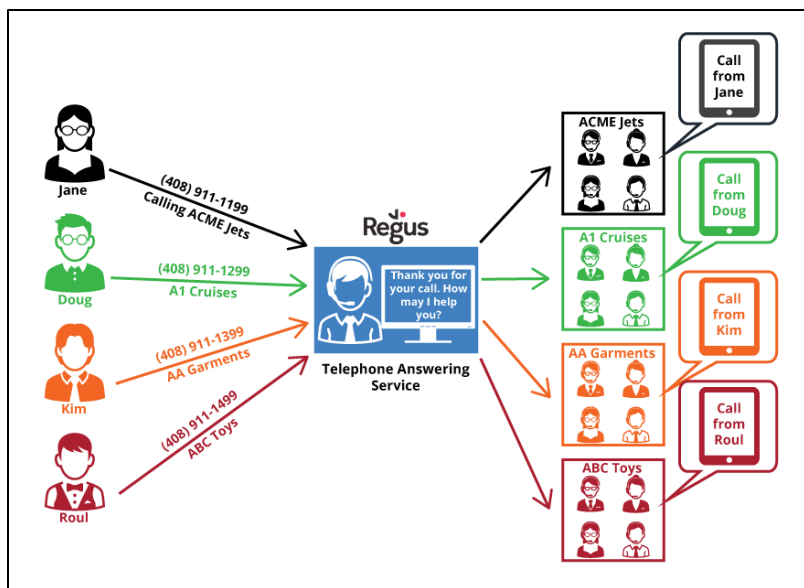
Identifying the Desired Called Party

Virtual Contact Center groups Regus customers by company name in the local CRM. For example, if AcmeJets is a Regus customer, in the local CRM, we upload contacts from the PBX assigned to AcmeJets. The user profile information is uploaded to the local CRM in the VCC tenant. The PBX ID is

populated to the system field in local CRM. When an AcmeJets customer calls, VCC searches the local CRM contacts and retrieves all contacts belonging to AcmeJets.

> **Note**: Virtual Contact Center applies a custom query using SCXML customization capability for local CRM. It also requires creating some custom fields to match the query. For example, there is a field to determine what customer record belongs to the main line of the company so that the right branch script is displayed. Any custom field may need to review SCXML to see if the custom query is affected.
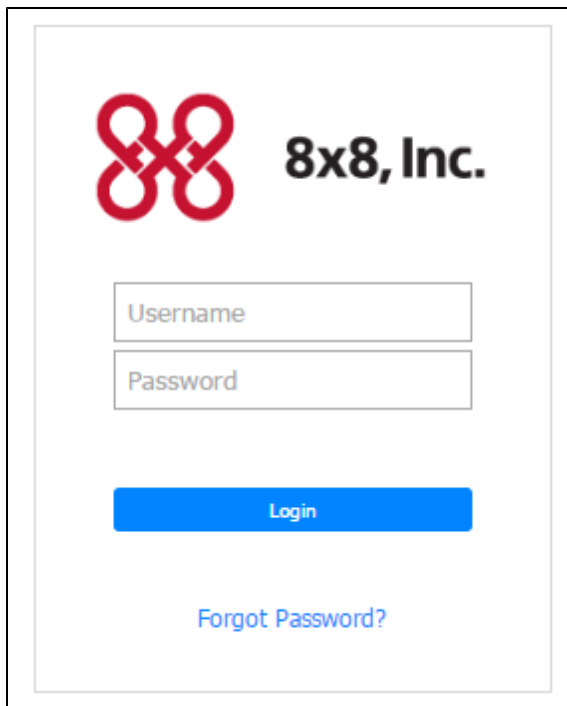
Custom Fields in Local CRM

- **PBX**: The PBX ID that identifies the PBX assigned to a company.
- **Greeting**: A custom script communicated by Virtual Office company contact and created by agents to greet callers. An example of a custom script is: "Thank you for calling AcmeJets. How may I help you?"
- **Extension**: The extension number of a Virtual Office company contact.
- **Mobile**: The mobile number of a Virtual Office company contact.
- **Notes**: Additional information such as if the user is busy or prefers you to leave a voicemail. The CRM data can be populated by CRM import from Configuration Manager.

Logging in to Agent Console

Agents serving the Telephone Answering Service for Regus will use 8x8 Agent Console to accept phone calls and direct them to the desired company contacts. Your contact center supervisor provides you with the login URL, username, and password required to log in to your Agent Console.

To log in to the Agent Console:

1. In your preferred browser, enter the URL.

2. In the login page, enter your username and password. Click **Login**.

   By default, the Agent Console launches in Break status.

   > **Note**: The username and password to log in to Agent Console is case sensitive. 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 can give you an access authorization.

3. Select **Available** or **Work Offline** status to initiate the session.
   Your supervisor may also instruct you to update certain parts of your user profile in Agent Console. See our complete guide for Agent Login.

Setting Your Phone Number

To receive and place calls via the Agent Console in Virtual Contact Center, you must first set up a phone number. You can set your phone number and other information in the **Profile** page.

1. Log in to Agent Console.

2. Go to **Menu > Profile**.

3. In the **My Profile** page, enter your **Workplace Phone** or **Workplace SIP URI** number.

4. Make a verification call. Your phone rings. On answering the call, you hear IVR prompts.

5. **Save** the changes.

Understanding the Call Flow of TAS

The overall process of a customer call to the desired company contact via the Telephone Answering Service agent involves the following steps:

1. A customer calls AcmeJets using the company's public number.

2. The call is redirected to a Virtual Contact Center channel and enters the call queue.

3. The call is offered to an agent serving the queue.

4. The agent accepts the call, previews the company contacts, and selects one of the following options:

   - Transfer the call to the desired contact at AcmeJets.

   - Transfer the call to the desired contact's voicemail.

5. The AcmeJets contact answers the call. The call is established between the customer and employee.

6. The Regus agent completes the post-processing, creates a case, and emails it to the contact at AcmeJets.

Call Flow Steps

As an agent at the Telephone Answering Service desk, follow the steps below to transfer the incoming calls to the desired company contact:

Step 1: Accept the Call

1. Log in to Agent Console.

2. In the Control Panel, change your status to **Available**.

   When the call comes in, it rings your workplace phone or workplace SIP URI number that you have set up earlier in your profile. Moreover, a screen pop occurs, listing all contacts belonging to the company.

3. Click **Accept** to answer the call.

   Your status changes to **Busy** when you accept the call. A screen pop occurs when the call is offered and brings up the details of the company contact whose telephone number matches the public number dialed by the recent caller. The contact designated as the main line for the company is highlighted for convenience.

Step 2: Greet the Caller with the Greeting Script

At the top of the page you can see a greeting script used to greet the callers. The custom greeting script provides a hint to the agent about the company and gives the caller the impression that they have reached the company directly. For example, the agent can tell if the customer is calling AcmeJets by reading the following script: "Thank you for calling AcmeJets. How can I help you?"

Step 3: Browse the Company Directory to Identify the Desired Contact

You can see the directory of contacts associated with the company. For example, AcmeJets contacts are all listed under AcmeJets in the **Customers** tab. The contact designated as the main line for the company is sorted to be on top of the query results. The greeting script associated with this contact record is displayed during the screen pop. 8x8, Inc. provides XML customization to add the click-to-dial capability to Virtual Office phone numbers such as voice, alternative, extension, and mobile. The **Search** capability in the screen pop also helps you find a contact quickly.

> **Note**: The **User Note** under customer details provides additional information such as if the user is busy, out of office, or prefers a voicemail. The content of this note is communicated by the company contact but updated by the agent as requested.

Step 4: Select a Phone from the Available Numbers To Transfer the Call

Agent Console supports the following types of phone fields:

- **Voice**: This is the company contact's DID or full number. This number is updated and synchronized via 8x8's CRM. It is pre-defined in Agent Console.

- **Alternative**: This is the company contact's alternative number. This number is updated by the company contact and synchronized via 8x8's CRM. It is pre-defined in Agent Console.

- **Extension**: It is a customized field containing the Virtual Office extension number of the company contact. The call can be established if the right PBX ID is selected for the company contact.

- **Mobile**: It is a customized field containing the mobile number of the company contact. You can choose to **Place Call** (warm) or **Transfer Call** (blind) to the mobile number.

> **Note**: The PBX ID is associated with the company. If PBX ID is selected in the customer records, it enables options such as **Place a Call**, **Transfer** and **Send to Voicemail** for voice, alternative, and extension. If the PBX ID is not selected for the customer records, the extension numbers become invalid. We support click-to-dial for mobile numbers.

Step 5: Transfer the Call to a Company Contact

Once you find the desired contact in the directory, right-click on the telephone number, and select one of the following options to transfer the call:

- **Place call**: Use this option to consult the destination user before transferring the call (warm transfer). You can inform the contact about the call waiting while placing the caller on hold. After the initial consultation, the agent transfers the call. The agent can also join the line for a conference by selecting **Join Lines**.

- **Transfer call**: Use this option to transfer the call (blind transfer) to the company contact.

- **Send to voicemail**: Use this option to transfer the call (blind transfer) to the contact's voicemail for later follow-up. This option can be used when the contact has a special note, such as, out-of-office.

Notes:

The highlighted row indicates the main contact of the company.

Step 6: Complete the Post-Processing After Finishing the Call

The company contact receives the call. The caller ID of the original caller is displayed to the contact. Depending on your tenant's configuration, you may need to complete post-processing for the phone interaction. Click **End Post Processing** to make your status **Available**, or click **Work Offline** if you need more time to complete any post-processing tasks.

Step 7: Create a Follow-up and Notify the Contact

After processing the call, it is desirable to notify the contact about the call via email. You can send a follow-up note by creating a case with the required details. The cases related to each company contact are listed under Case tab.

To create a case record:

1. Scroll down under the company contact screen pop to see Case tab.

2. Click **New Case** link in the Case tab.
   The **From** address is automatically populated with the agent's email address.

3. Select the **To** address from the list of recipients. Select **Cc** and **Bcc** recipients if needed.

4. The **Subject** is populated, but you can edit it.

5. Enter a message in the **Description** text entry areas.

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

7. 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.

See our User Guide for a complete instruction in Creating and Editing Case Records.

Updating Company and Contact Information

At times you may need to update a company contact record or add a new contact. Follow the procedure below:

How do I update a company or contact record?

You can update a company contact record to change the greeting message, add or update a user note, and add or update a mobile number:

To update a company or contact record:

1. Log in to Agent Console.
2. Go to the **Customers** tab.
3. Select an existing customer and click **Edit**.

4. Update the **Greeting**, **User Note**, and **Mobile** fields.
5. Click **Save**.

How do I add a contact to an existing company?

The customer contact information such as voice or alternative numbers are regularly updated in CRM and synchronized with the Telephone Answering Service agent's directory. An agent may occasionally need to add a new customer record whenever a user provides a mobile number as his or her main contact information.

To add a new contact record:

1. Log in to Agent Console.
2. Go to the **Customers** tab.

3. Click **New Customer** in the top-right corner.

4. Enter the information such as **First Name** and **Last Name**.

5. Enter the **Company** name.

   For best practice, select the **Company Search** to locate the company in the list.

6. Click to open the **PBX** drop-down list and select the PBX that the user belongs to.

   The disabled PBXs appear grayed out.

7. Write *Yes* if the company contact is the main line.

> **Note:** You must enter *Yes* or *No* in the **Mainline** text box field to receive a greeting message. For best practice, select only one company contact as your main line. To make a contact the main line, click **Edit** for an existing customer, and type *Yes* in the **Mainline** text box.

8. Click **Save**.