



Enterprise Contact Center Agents Guide

This guide introduces users to the system and its call management features. Agents, being key communicators, can enhance their skills through this dedicated training, reinforcing our commitment to smooth customer interactions.

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Overview

Efficient use of the CloudAgent Enterprise Contact Center portal is vital for quality customer experience.

This guide introduces users to the system and its call management features. Agents, being key communicators, can enhance their skills through this dedicated training, reinforcing our commitment to smooth customer interactions.

Outcomes

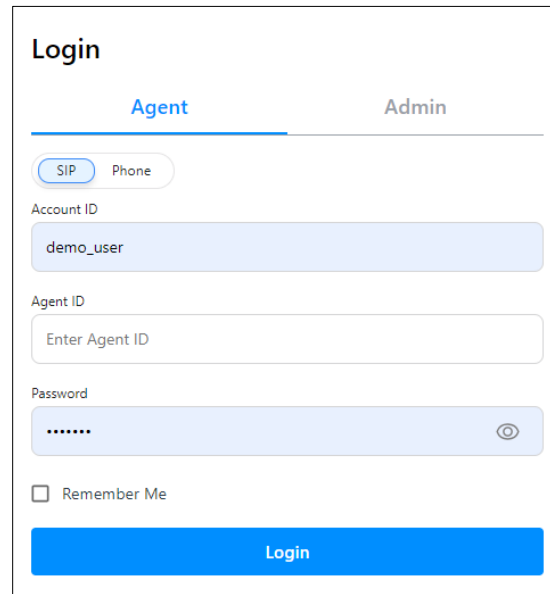
After finishing this course, learners will acquire the skills to:

- Log in and carry out basic tasks in the CloudAgent portal.
- Understand the layout of the agent screen.
- Execute diverse call tasks like Receiving, Transferring, and Conferencing.
- Dispose calls
- Comprehend additional features available on the agent's screen.

Getting Started

For a smooth start, here's how to access CloudAgent:

- Use Google Chrome or Mozilla Firefox browsers for the best experience.
 - **Note:** All screenshots are from Google Chrome.
- Go to the website URL where you will be presented with a login screen:



- Select the blue-highlighted "Agent Login" to sign in as an agent. Don't use the other login meant for Admin. **Bookmark the main login page for quick access.**
- Enter the appropriate agent login credentials. Once all the required fields are filled, click "Login" to access the home page.
 - In the case of agents using the 'SIP' Login option - SIP number input is not needed
 - **Note:** Ensure SIP numbers are added in the 'Agent Phone' section of the 'Manage Numbers' configuration page of the Admin guide
 - **Note:** Make sure the SIP locations are configured appropriately per the Admin guide.

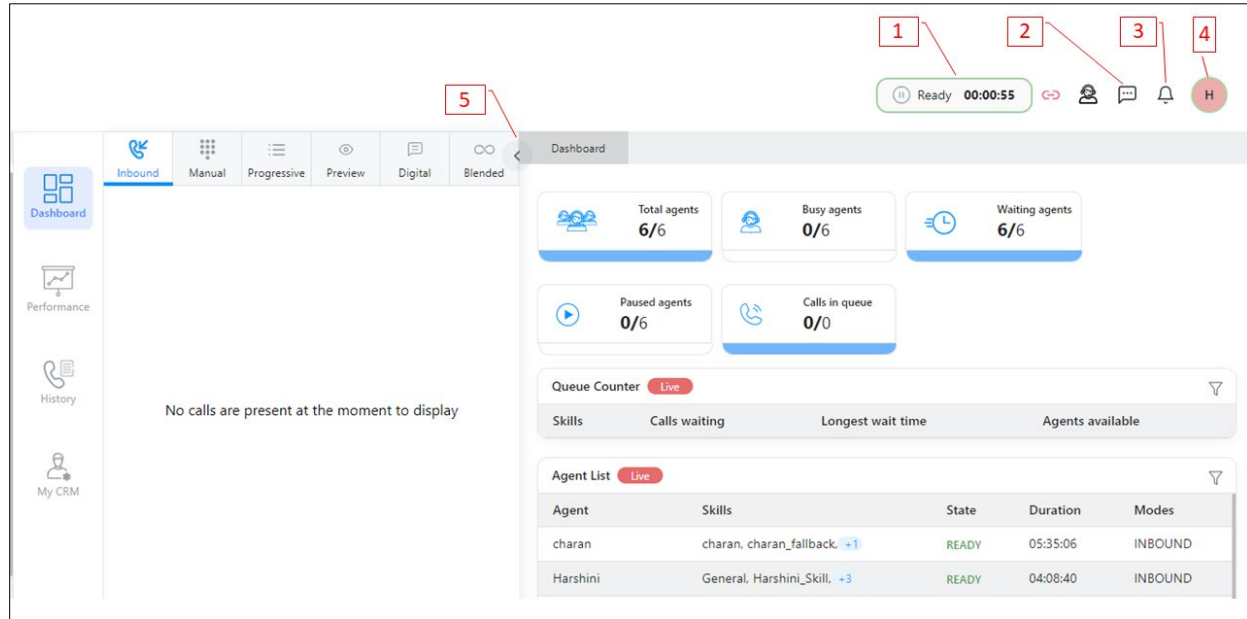
Refer to the below table for further details:

Phone Number	SIP: Choosing this option automatically assigns a SIP number to you. Phone: Select this option if you're using a CloudAgent registered phone number. Enter the number accordingly.
Account ID	CloudAgent account ID
Agent ID	The unique ID assigned to an agent
Password	Password for authentication, assigned by the admin

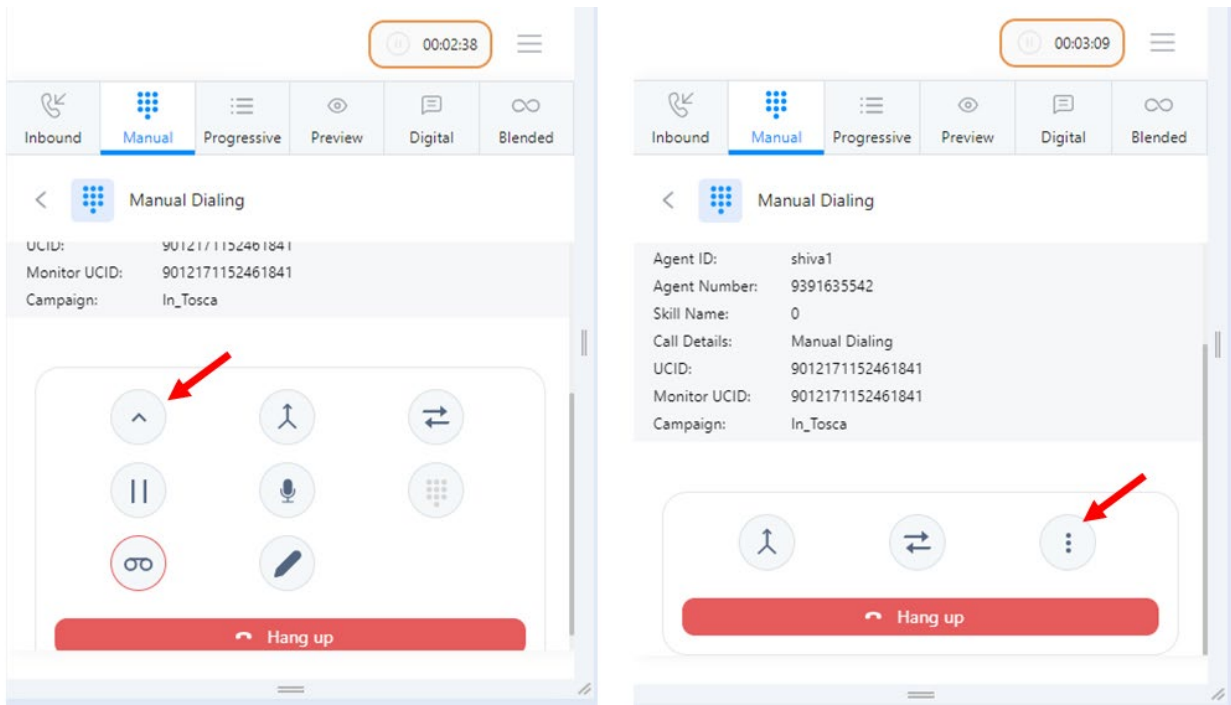
Understanding Agent Interface

In this section, we'll explore the agent interface, understanding its elements and functionalities to enhance your performance.

Primary options

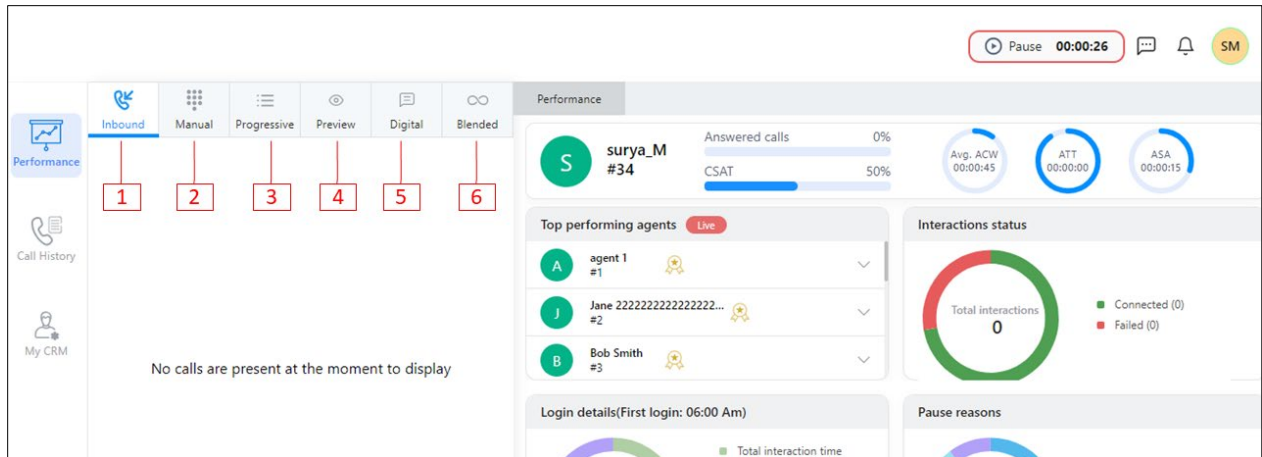


1. **Status Update:** When logging in, your status defaults to 'Not Ready'. Click the 'Not Ready' button again to switch to the 'Ready' state.
2. **SMS:** Send texts to customers when needed.
3. **Notifications:** View admin chat broadcast messages for emergency notifications.
4. **Agent Actions:** Force Ready / Refresh / Change Password / Logout.
5. **Minimize the toolbar:** Agents can conveniently minimize the toolbar using the toggle arrow button, particularly beneficial when accessing it through the CRM interface.
 - i. **Minimize the call controls:** Agents can optimize screen space by minimizing call controls. The option to minimize these controls will dynamically appear based on the agent's screen size. Refer to the following image for the buttons enabling minimization and expansion.



Agent Modes

Agents can choose the following handling modes for communication:

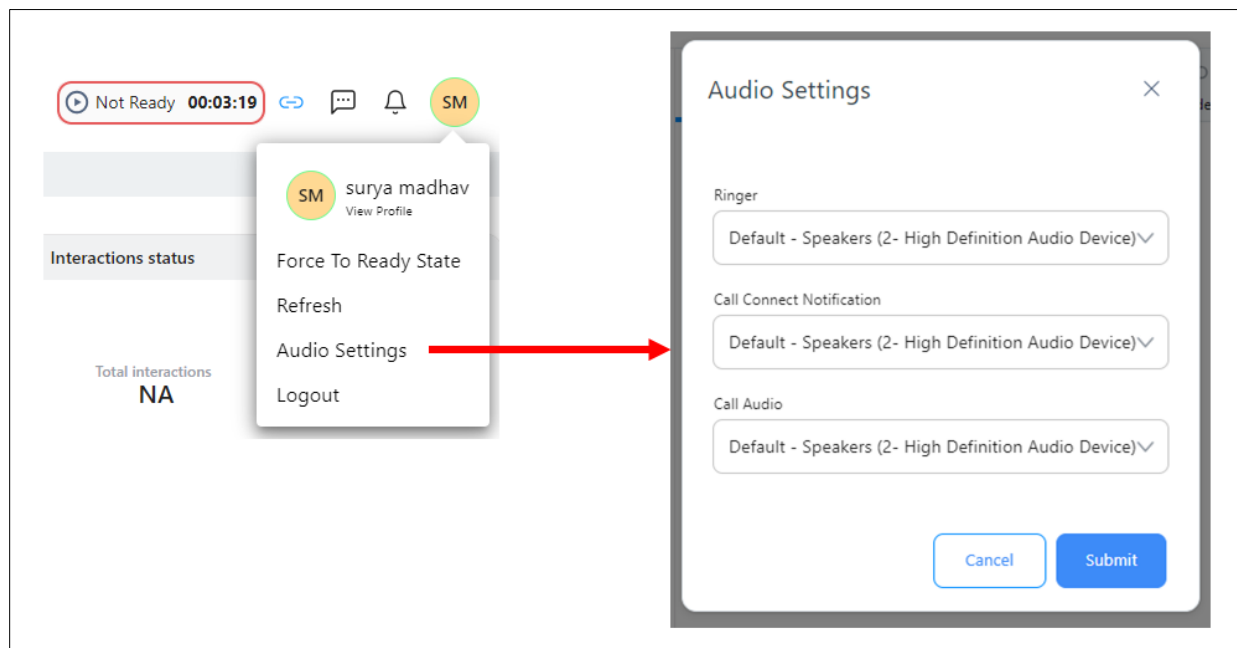


1. **Inbound:** Handle incoming calls and emails.
2. **Manual:** Make manual outgoing calls.
3. **Progressive:** Manage Auto dialer calls (Progressive type).
4. **Preview:** Handle Preview dialer calls.
5. **Digital:** Manage digital channels (Webchat, Inbound SMS/Texting, WhatsApp, Social Media).
6. **Blended:** Handle any of the above channels all in one mode.

Audio Settings

Agents can adjust their audio device settings directly from the toolbar, accessible during SIP login. To select any connected audio devices, agents must grant microphone permissions. The available options include:

- Ringer
- Call Connect Notification
- Call Audio



Handling Voice Calls

Whether it's an inbound or outbound call, the agent workflow remains consistent. The workflow comprises of four main components for voice calls:

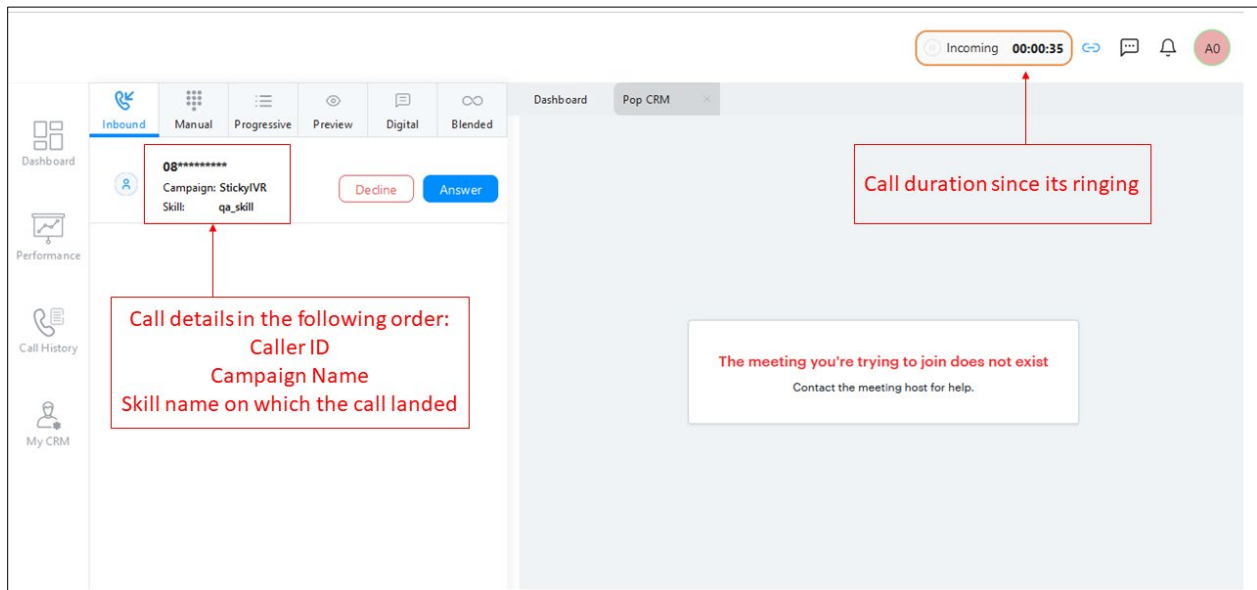
- **Answering Calls:** Agents begin conversations by promptly answering incoming calls.
- **Call Controls:** Agents use controls for tasks like muting, holding, and ending calls.
- **Transfer:** Agents transfer calls to third parties using different types for smooth communication.
- **Conference:** Agents connect conference calls to include multiple parties.

Now, let's delve into each topic for detailed exploration:

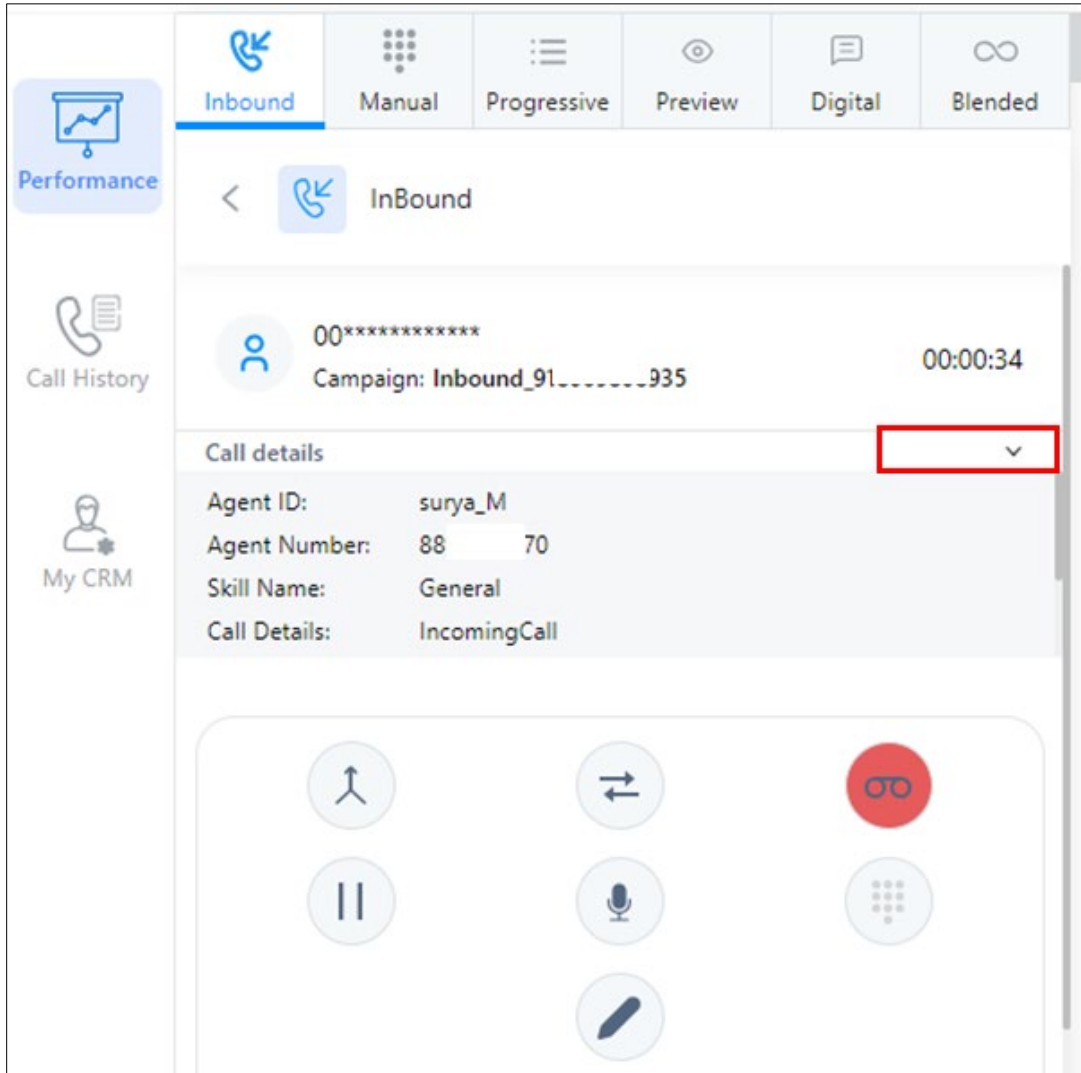
Answering a Call

The Agent interface provides an easy method for call answering. If WebRTC phone isn't on auto-answer, agents must click to answer calls.

When an incoming call arrives, the agent screen appears as shown below. If auto-answer is on, calls are answered automatically.

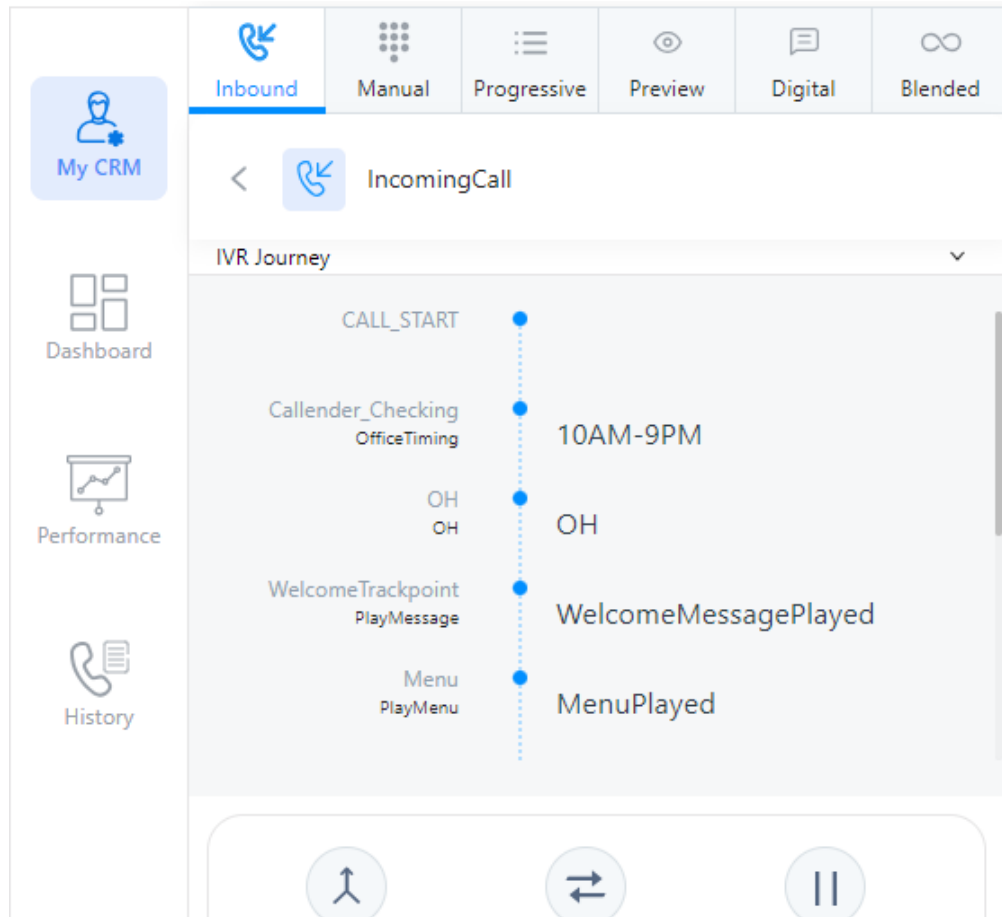


After answering, agents move to the next screen. Note that extra call details aren't visible initially; clicking the small paper icon reveals them.



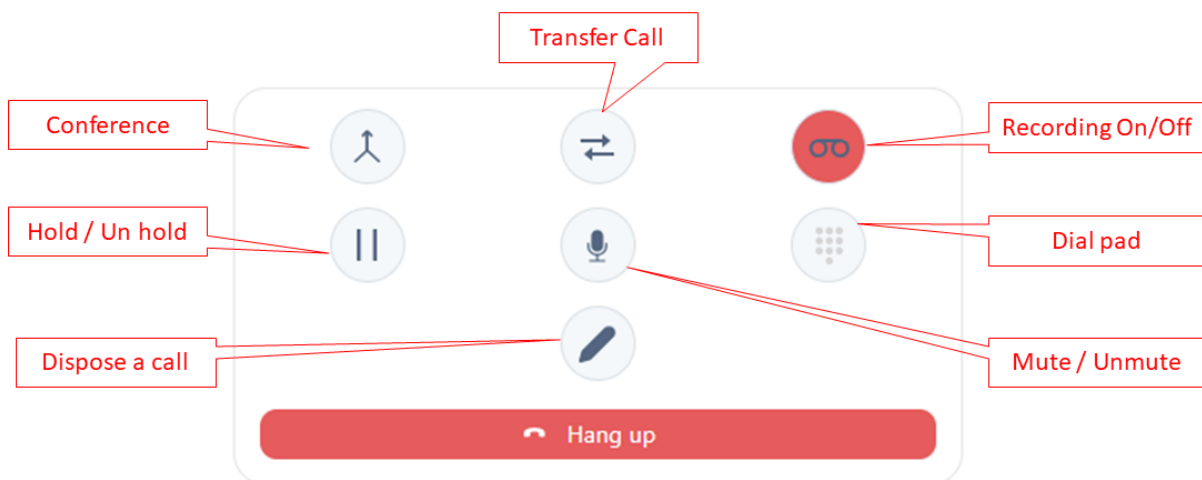
IVR Journey of the Customer:

Agents can view the customer's IVR walkthrough on their screen to gain context for more effective interaction. To access the IVR Journey, click on the IVR Journey drop-down menu.



Call Controls

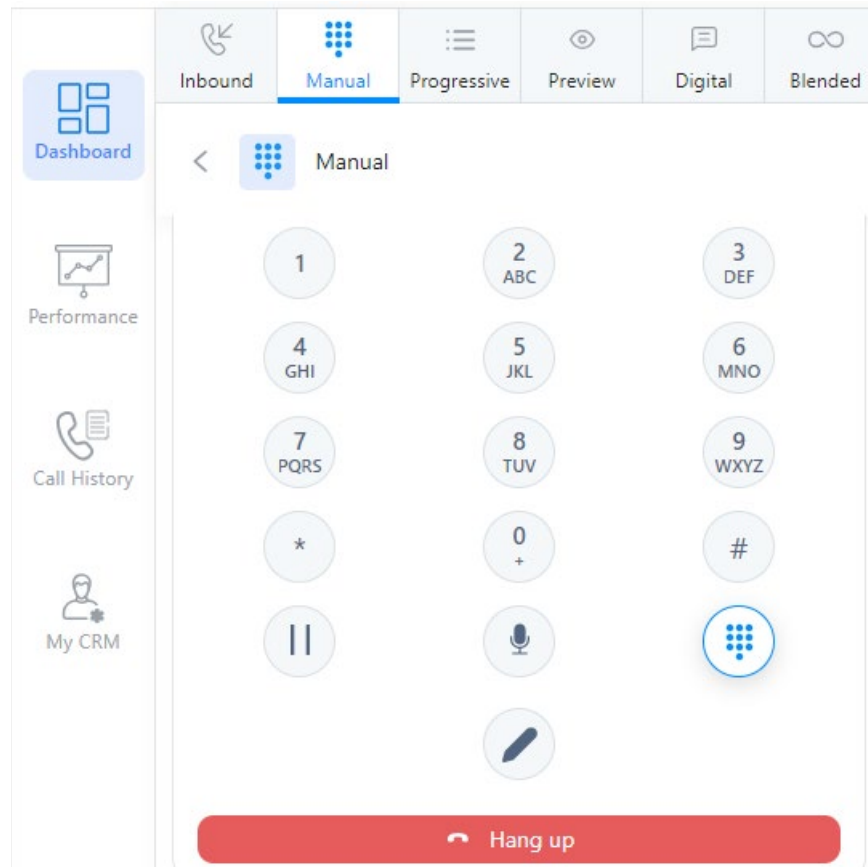
After answering a call, CloudAgent offers multiple call management options. Let's explore these icons and observe their changing states.



The control buttons work as toggles, activating or deactivating specific features. For instance, buttons like Mute, Hold, and Recording can be switched on or off with a single click. In terms of user experience, active buttons or controls are highlighted in red, while inactive ones stay unhighlighted.

Here are the Call Controls for agents, with brief explanations:

- **Mute:** Temporarily mutes the agent's microphone during the call to reduce noise or hold private conversations.
- **Hold:** Temporarily pauses the call, often used to gather information or consult before continuing.
- **Transfer:** Used to consult a third party (usually another Agent / Skill / IVR / Phone) for addressing customer questions. The call can be transferred in two ways:
 - **Blind transfer:** In this method, the initiating agent transfers the call to a third party, resulting in the initiating agent's disconnection and the new agent's connection with the customer.
 - **Warm transfer:** With this approach, the initiating agent transfers the call to a third-party agent, allowing both agents to participate in the call with the customer simultaneously.
- **Conference:** Adds more parties to the call with the customer.
- **Recording:** Agents can disable audio recording for sensitive information and enable it as needed.
- **Dial Pad:** Useful for navigating IVR menus during outgoing calls, and supports alpha characters.



- **Disposition:** Disposes of the call and provides an option to save after completion.
- **Send Message:** Send an outbound message to the customer while on call & initiate a simultaneous chat conversation. Refer to [Cross Channel Connect](#) section for more details.

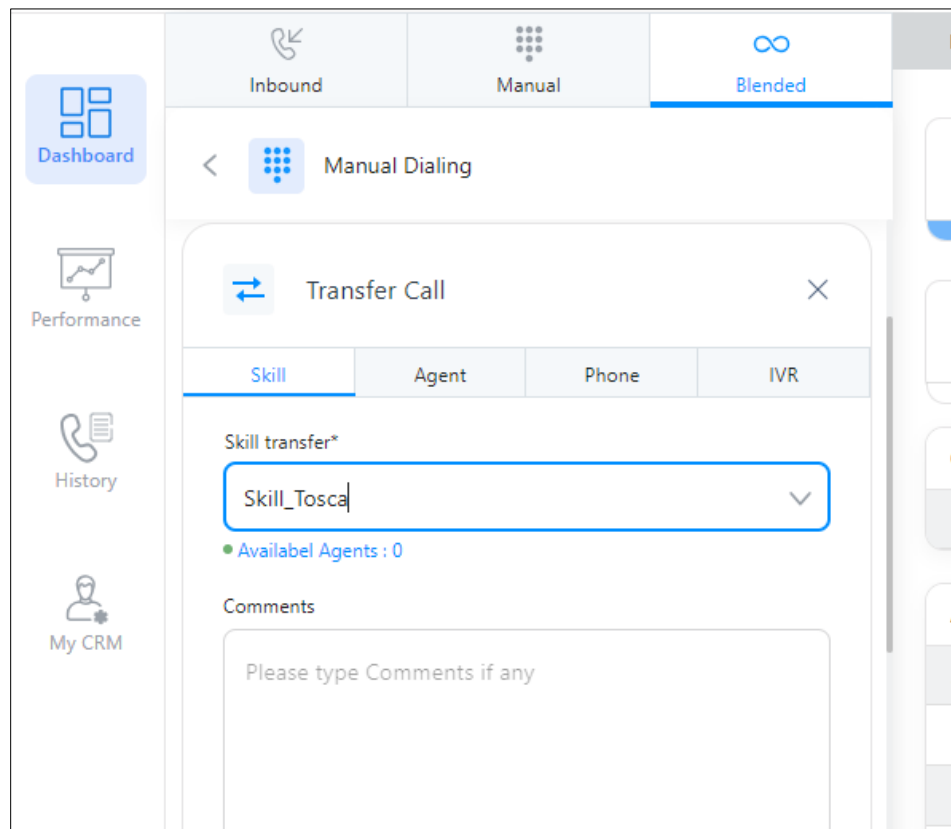
Connect with 3rd Parties and Explore Transfer Types

We support two types of transfers:

- **Blind Transfer:** In this method, the initiating agent transfers the call to a third party, resulting in the initiating agent's disconnection and the new agent's connection with the customer.
- **Warm Transfer:** With this approach, the initiating agent transfers the call to a third-party agent, allowing both agents to participate in the call with the customer simultaneously.
 - For Warm Transfers, two events can occur:
 - **CANCEL Transfer:** Once the agent connects with the 3rd party agent, clicking the "Cancel transfer" button allows the main agent to disconnect the 3rd party agent and initiate another transfer.
 - **COMPLETE Transfer:** After the main agent connects with the 3rd party agent, clicking the "Complete transfer" button results in the main agent being disconnected, leaving the 3rd party agent and the customer on the call.
 - Agents can also toggle between the third party and the customer while keeping the third party on hold.

Within transfers, agents can choose from these entities:

1. **Skills:** Used when customers need to be rerouted to the correct group.
 - i. An agent can also see the number of agents available in a particular skill while doing a skill transfer.



2. **Agent:** For specific agent requests, showing available agents.
3. **Phone:** For third parties not in the system, agents can enter their number.
4. **IVR:** Transferring to an Interactive Voice Response system.

When clicking a transfer button, the initial screen varies based on your choice. Here are the interfaces for different transfers:

- Skill Transfers: Choose a skill for routing from the searchable list.

< InBound

Skill Agent Phone IVR

Skill transfer*

Please choose a Skill to transfer

Comments

Please type Comments if any

Allow recording on transfer

Cancel Transfer

< InBound

Skill Agent Phone IVR

Skill transfer*

Please choose a Skill to transfer

Sui

ONLY

General

Allow recording on transfer

Cancel Transfer

- Agent Transfers: Select an agent for routing from the searchable list.

The screenshot shows the 'InBound' interface with the 'Agent' tab selected. The 'Agent transfer*' section features a search input field with the placeholder text 'Please choose a Agent to transfer'. Below the input, a list of search results is displayed, including the name 'sandeep' and the number '970.'. A checkbox labeled 'Allow recording on transfer' is checked. At the bottom, there are three buttons: 'Cancel', 'Blind Transfer', and 'Warm Transfer'.

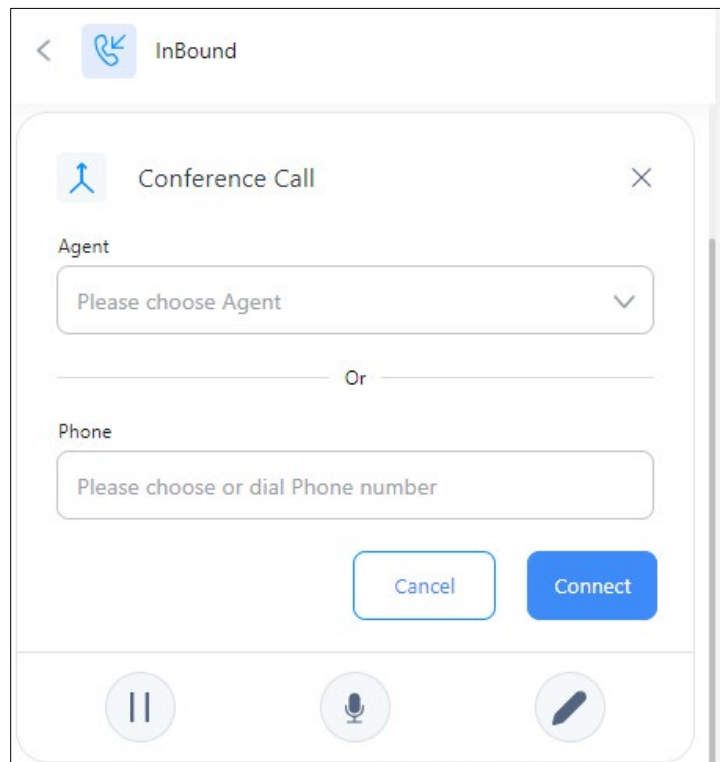
- Phone Transfers: Choose a phone number for routing, or directly enter one.

The screenshot shows the 'InBound' interface with the 'Phone' tab selected. The 'PhoneNumber transfer*' section features a search input field with the placeholder text 'Please choose a PhoneNumber to transfer'. Below the input, a list of search results is displayed, showing phone numbers: '09 00', '08 59', and '08 70'. A checkbox labeled 'Allow recording on transfer' is checked. At the bottom, there are three buttons: 'Cancel', 'Blind Transfer', and 'Warm Transfer'.

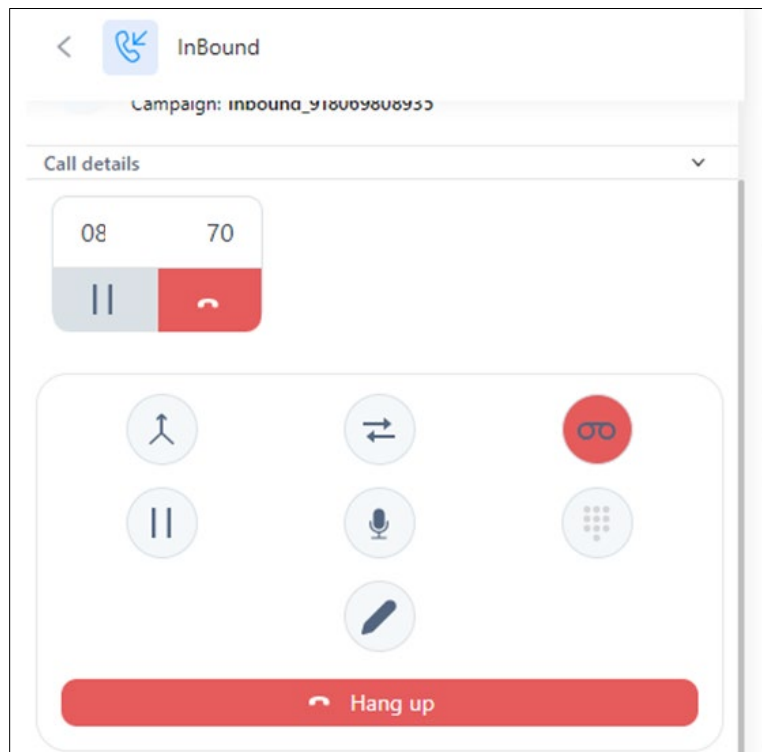
Conference

Conference works similarly to Warm Transfer but allows multiple parties. The agent can hold, disconnect any party during the conference.

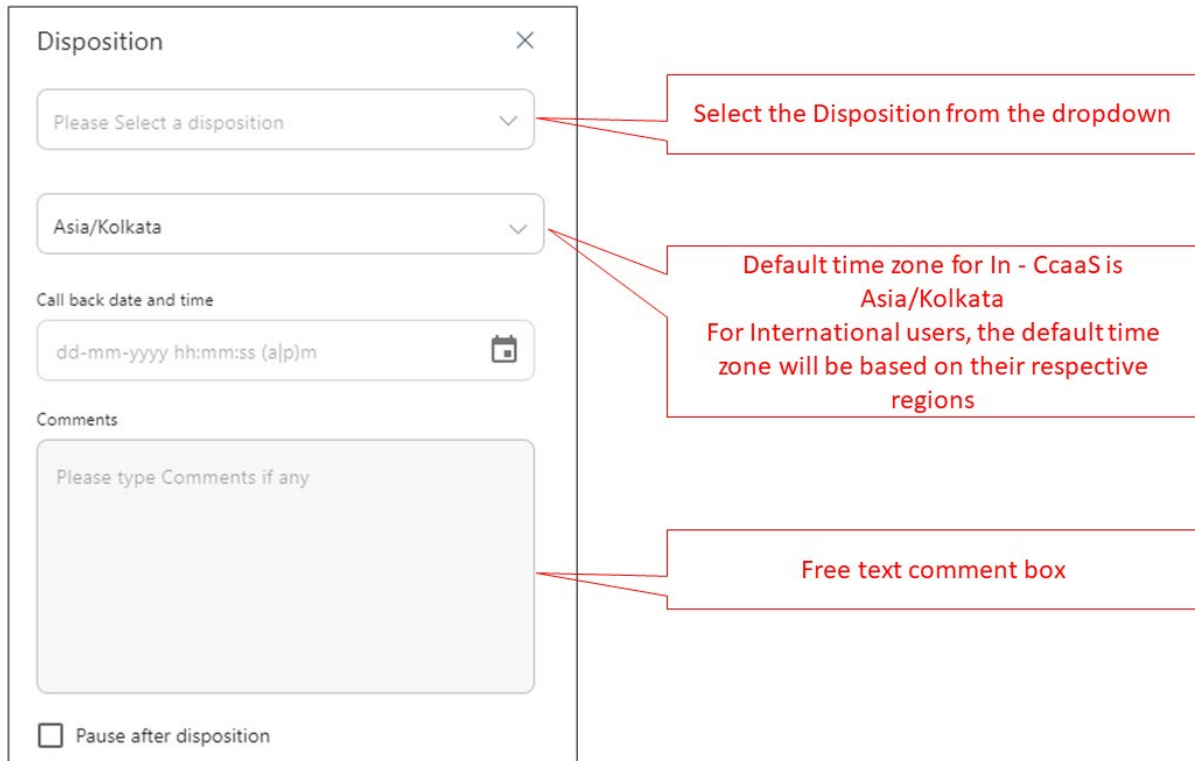
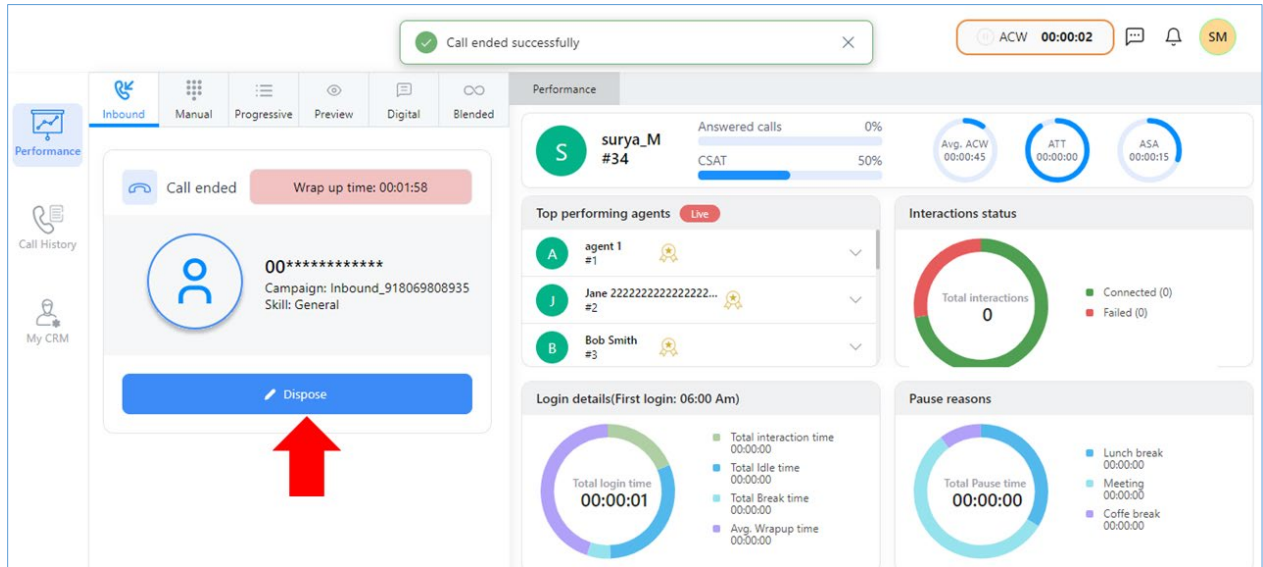
Below is a screenshot of the agent's screen during a conference call:



Agents can conference with another agent or phone. Once the 3rd party is added, the agent sees the following screen:



After the call, agents reach the disposition screen. To provide details, click **Dispose**.



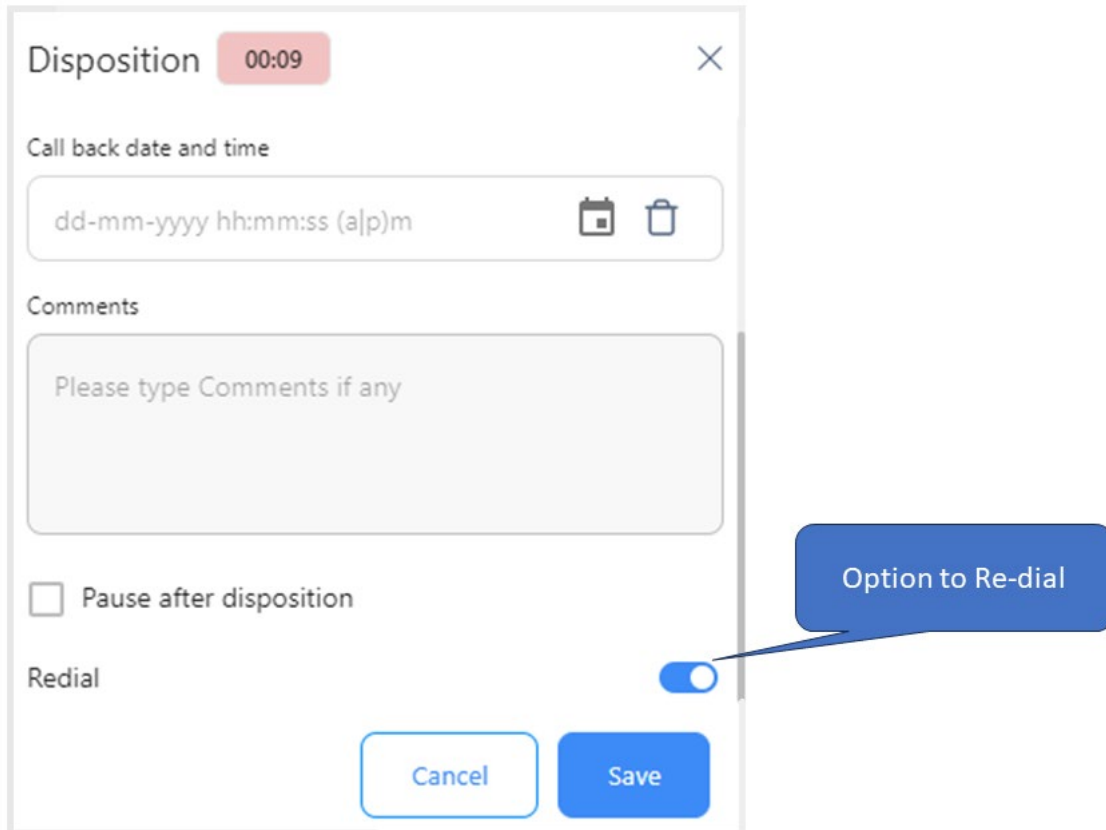
Re-Dial

Calls may get disconnected for various reasons during a conversation. As an agent, you have the option to redial the same number after disposing of the current call. To do this:

1. While disposing the current call, in the disposition window, select the "Redial" option.
2. Once the call is disposed, the system will automatically redial the customer's number.

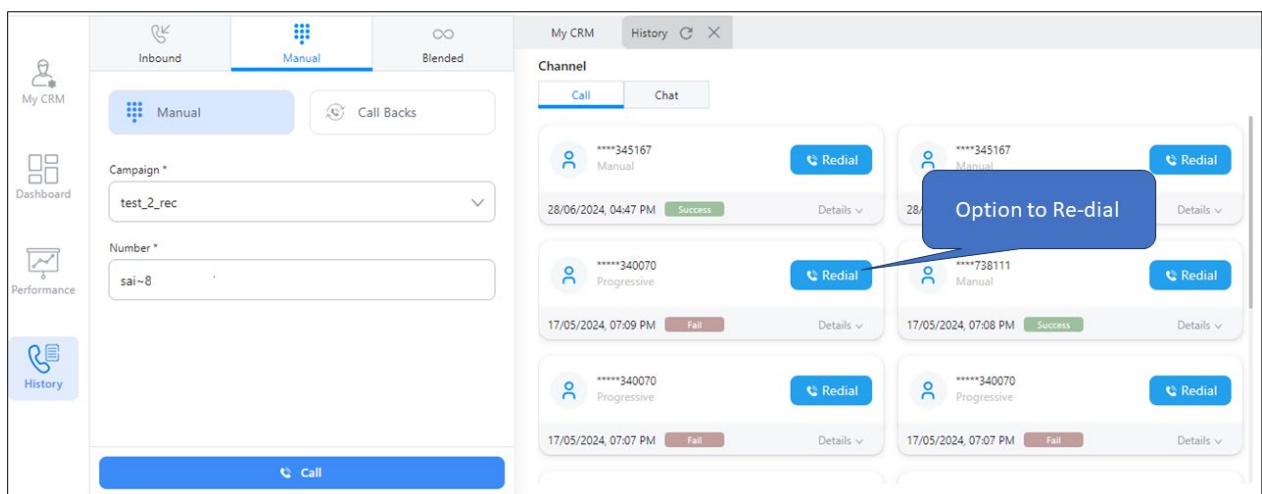
Note

- The redial option is only available in **Blended** and **Manual** modes.
- The "Pause after disposition" feature will be disabled when the redial option is enabled.
- The number of re-dials to a customer is controlled by your admin.



The image shows a 'Disposition' dialog box with a timer at 00:09. It includes a 'Call back date and time' field with a placeholder 'dd-mm-yyyy hh:mm:ss (a)p)m' and icons for calendar and trash. Below is a 'Comments' text area with the placeholder 'Please type Comments if any'. There is a checkbox for 'Pause after disposition' and a 'Redial' toggle switch which is currently turned on. A blue callout bubble points to the 'Redial' toggle with the text 'Option to Re-dial'. At the bottom are 'Cancel' and 'Save' buttons.

Additionally, you can redial the calls through the Call History option.



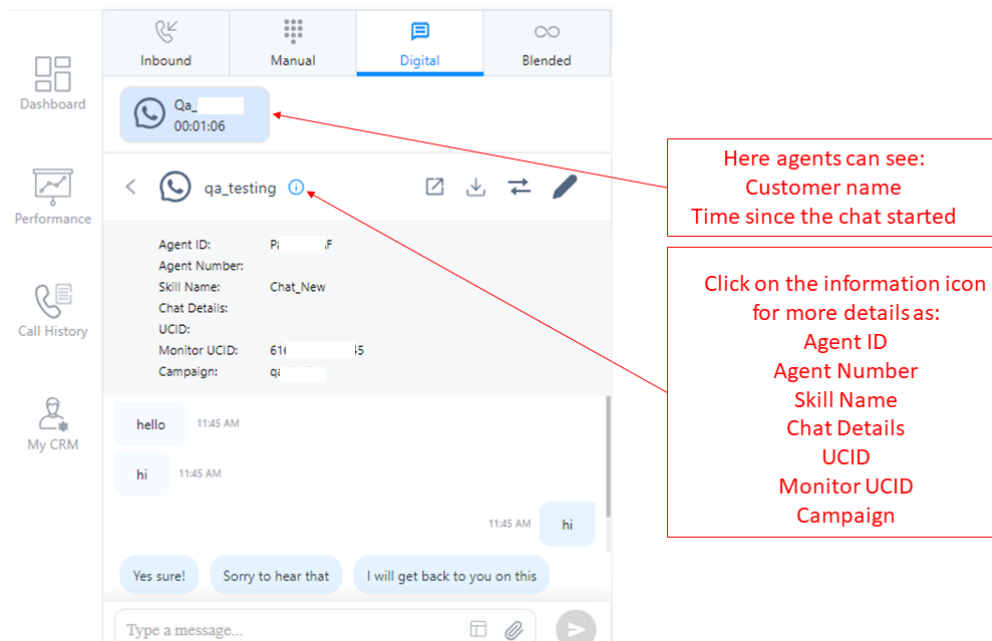
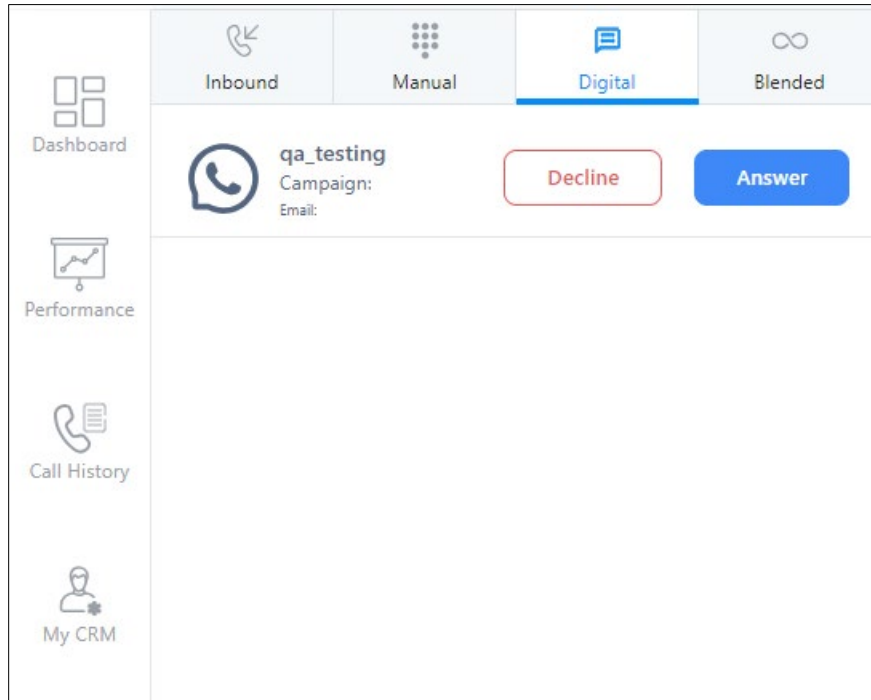
The image shows a 'My CRM' interface with a 'History' tab. The left sidebar has 'My CRM', 'Dashboard', 'Performance', and 'History' sections. The main area shows 'Inbound', 'Manual', and 'Blended' modes. Under 'Manual', there are 'Manual' and 'Call Backs' buttons. Below are fields for 'Campaign *' (test_2_rec) and 'Number *' (sai-8). A 'Call' button is at the bottom. The right pane shows a 'Channel' list with 'Call' and 'Chat' tabs. It displays a list of call records with columns for contact ID, channel, date/time, status, and a 'Redial' button. A blue callout bubble points to one of the 'Redial' buttons with the text 'Option to Re-dial'.

Channel	Call	Chat
****345167 Manual	28/06/2024, 04:47 PM Success	****345167 Manual 28/06/2024, 04:47 PM Success
****340070 Progressive	17/05/2024, 07:09 PM Fail	****738111 Manual 17/05/2024, 07:08 PM Success
****340070 Progressive	17/05/2024, 07:07 PM Fail	****340070 Progressive 17/05/2024, 07:07 PM Fail

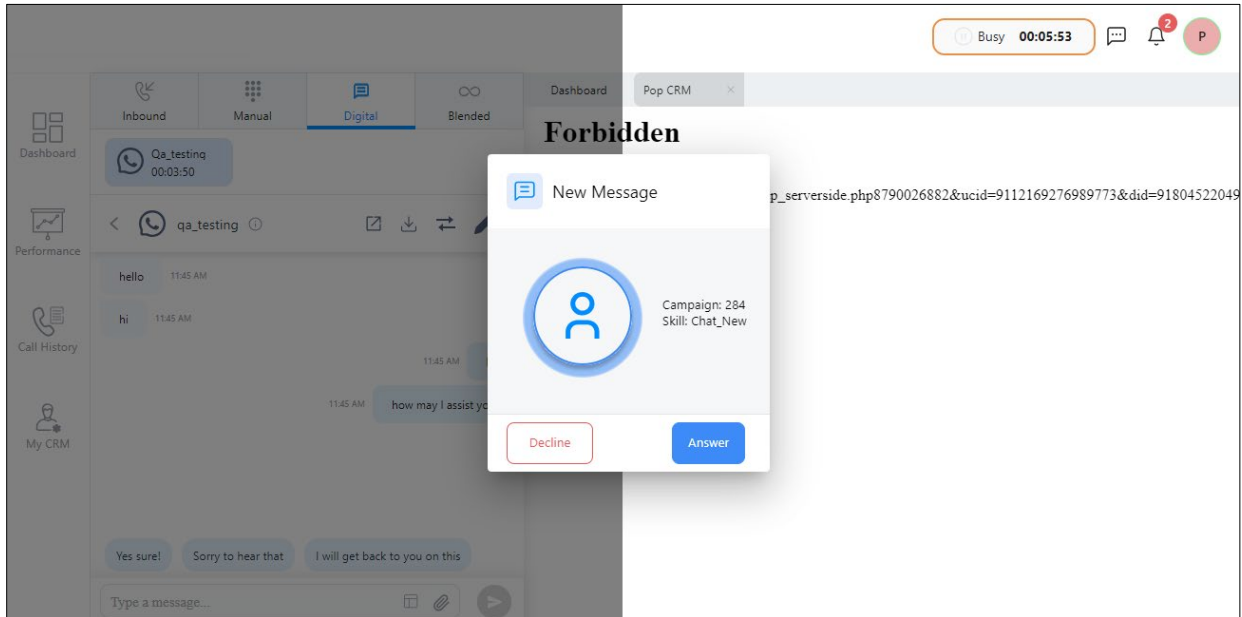
Handling Chat / Digital channels

All Digital channels are consolidated under the Chat option for agents, regardless of the customer's entry point (SMS, Webchat, WhatsApp, Twitter, or Facebook). Agents handle multiple sessions concurrently, but the chat interface is distinct.

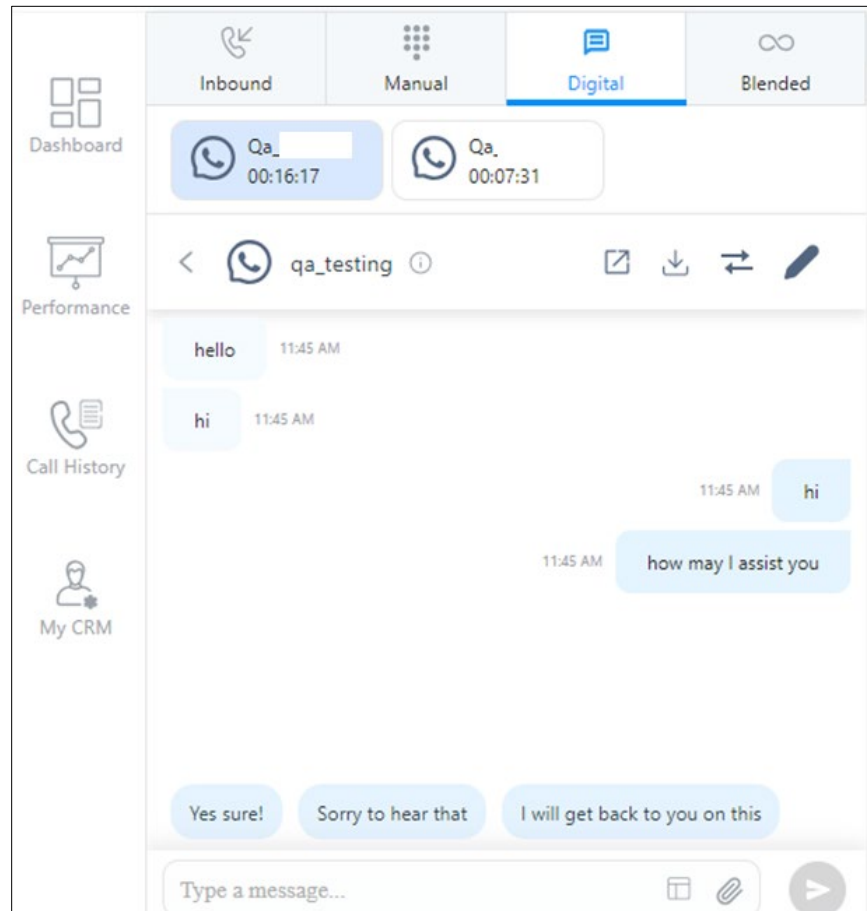
- During a chat, agent messages appear on the right and customer messages on the left.



- When another customer contacts the agent, a pop-up notification appears.



- Incoming chats from multiple customers are organized as depicted below:



Note: Agents receive chat transcripts that include previous interactions.

Chat screen highlights:

- Active chat is BLUE.
- Customer chats display first letter of the name.
- Customer chat is left, agent is on the right.
- DISPOSE text turns BLUE if customer ends chat.

An agent can go on break while still on chat with customers, ensuring they do not receive any new chats from Digital during this time. This feature ensures that the agent will not be assigned additional chats from Digital while on break.

Sticky agent in WhatsApp Outbound

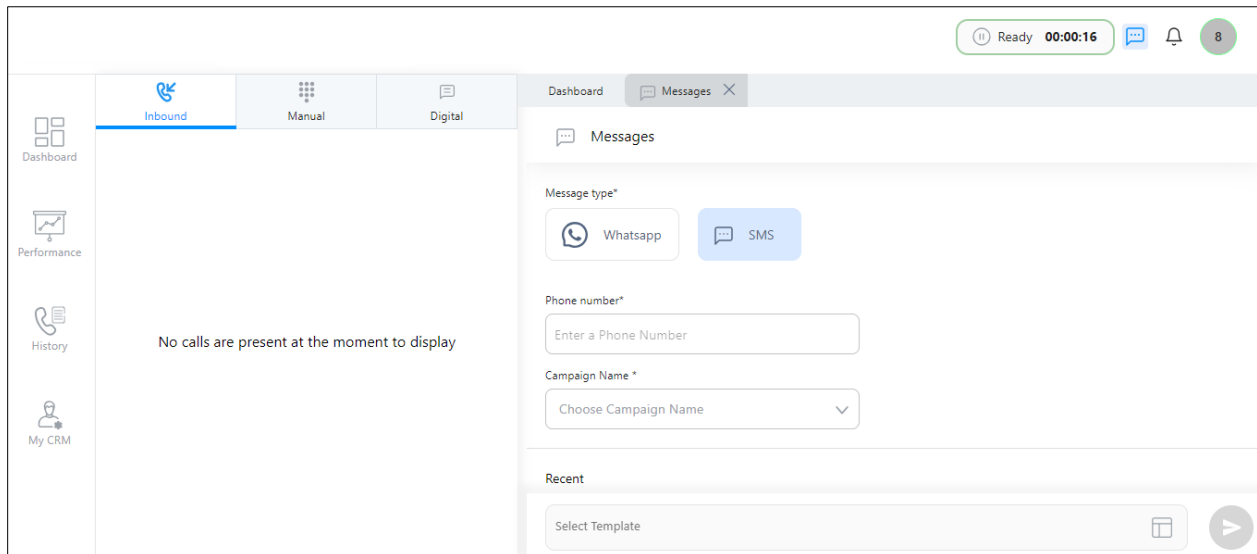
The system consistently pairs an agent with a customer for future interactions.

- After an agent starts a chat, they remain the main contact for that customer.
 - If the agent is free, the customer connects to them immediately.
 - If the agent is busy, the customer waits in line following fallback rules until the agent is available. This ensures efficient customer service while considering the agent's availability.

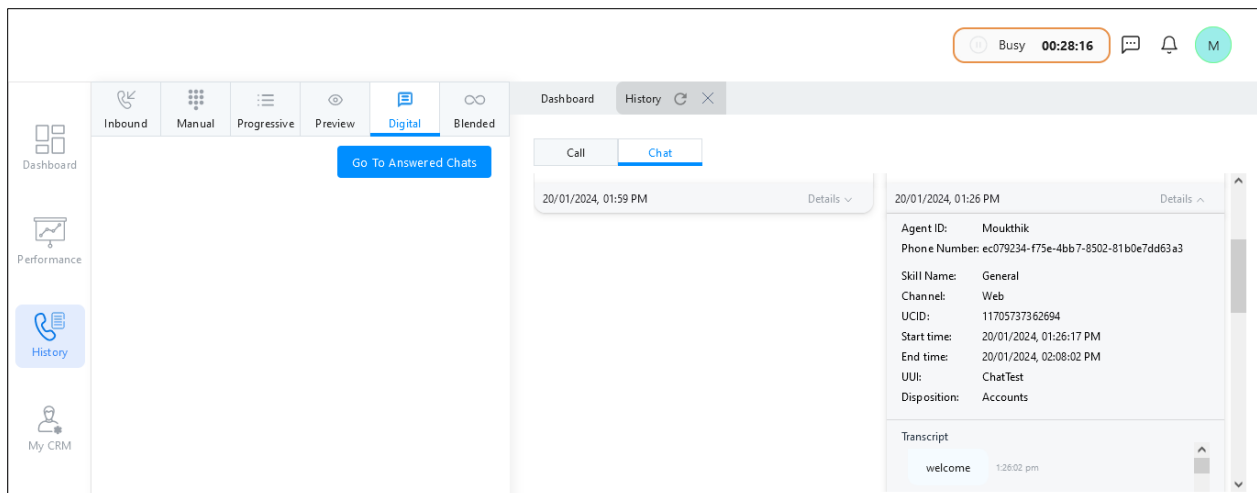
This feature can be enabled in the Admin Settings (see Admin Guide).

Outbound SMS

- Agents can send outbound SMS and WhatsApp messages from the agent toolbar. Take into account the following aspects regarding this functionality:
 - The Super Admin needs to enable the 'Role_SMS' for the account to activate the outbound SMS (WhatsApp and SMS) feature.
 - WhatsApp and SMS communication can be managed using multiple campaigns, and agents can select the desired campaign from the available list.
 - Agents have access to WhatsApp and SMS Templates (see Admin Guide) configured for the account, which they can utilize when communicating with customers.



- The agents will be able to see the last 20 chats in the 'Chat History' tab on the screen pop so that the agent can have a reference of the chat information along with the transcript as shown below.

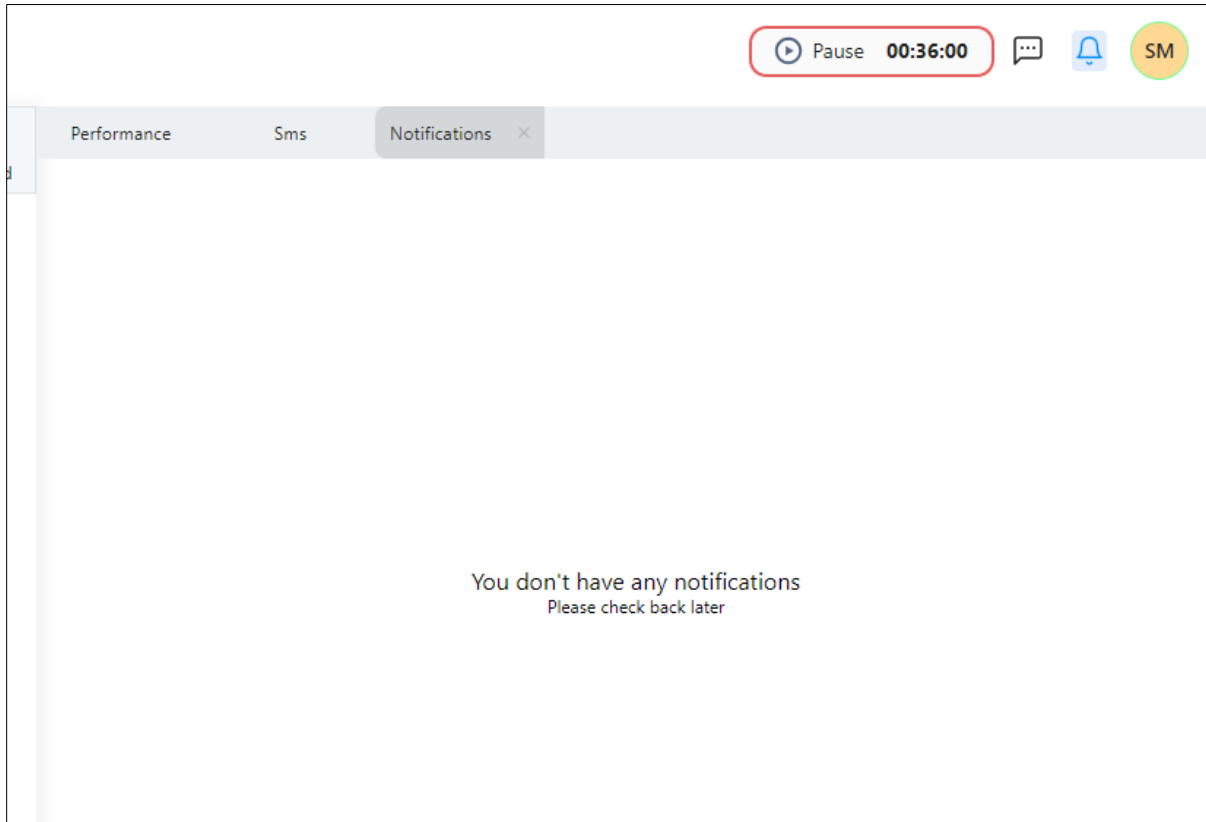


Other Features

Agents have access to the following top features:

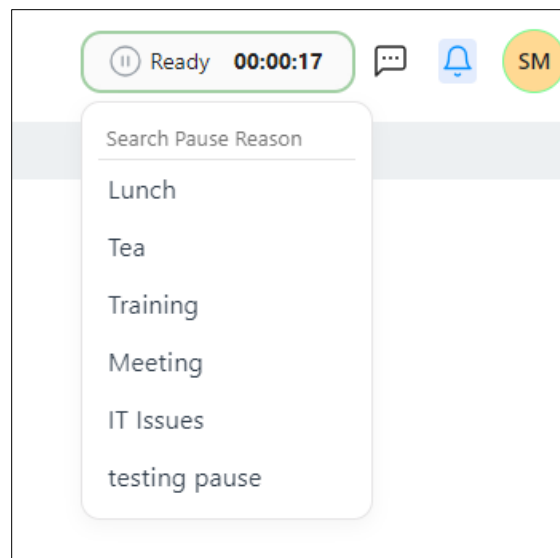
Agent Notification

Agents receive admin chat broadcast notifications at the top of their screen. The bell icon turns dark.



Agent Pause

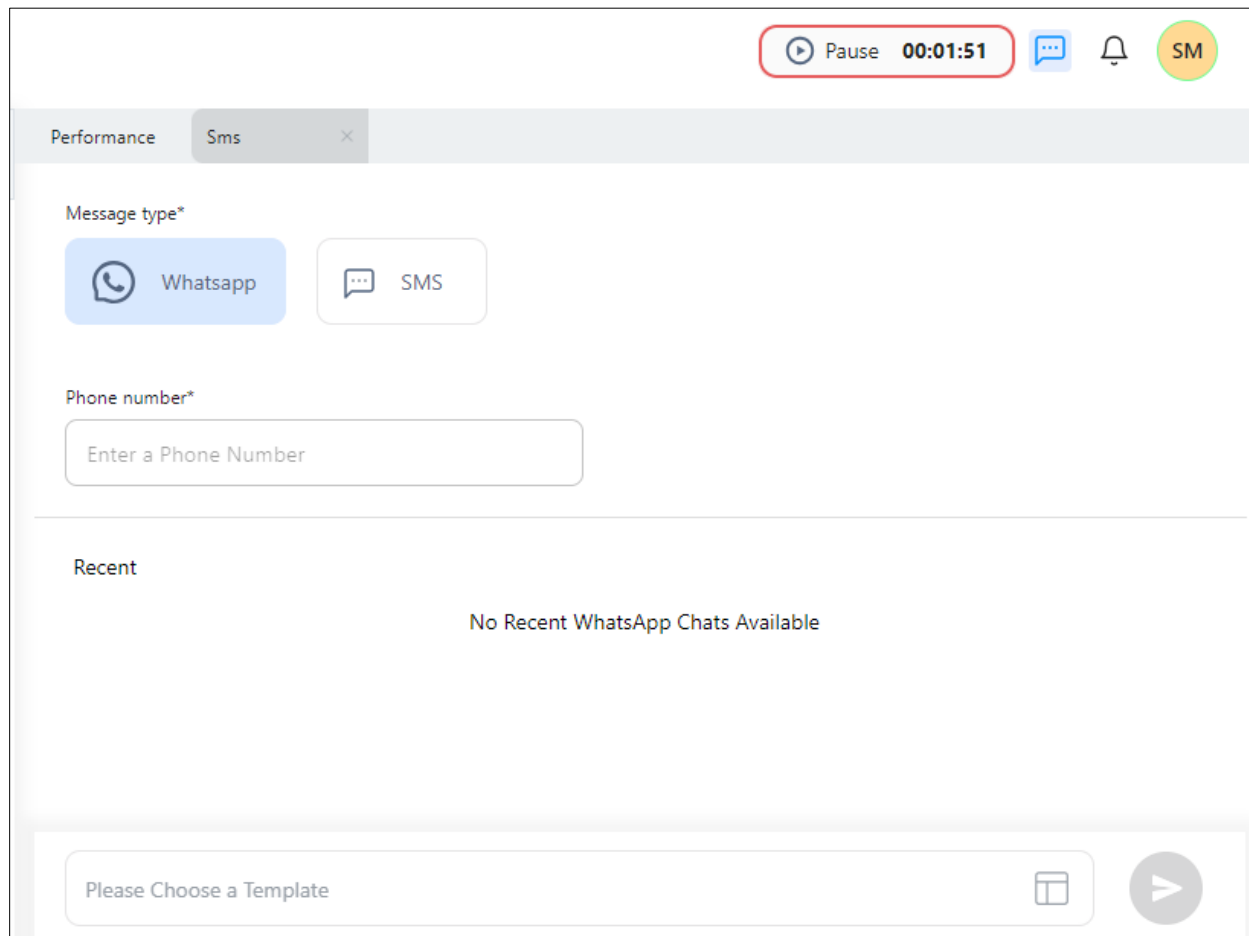
Agents can take breaks by clicking the pause icon.



Agent sending text messages

NOTE: This feature is available through an applicable role in the system. Please check with your administrator for further details.

- To send SMS to customers, agents click the messaging icon. Below is the interface.



The screenshot displays the agent messaging interface. At the top right, there is a 'Pause' button with a timer showing '00:01:51', a chat icon, a bell icon, and a 'SM' icon. Below this, there are two tabs: 'Performance' and 'Sms'. The 'Sms' tab is active. Under 'Message type*', there are two buttons: 'Whatsapp' (with a phone icon) and 'SMS' (with a speech bubble icon). Below this is a 'Phone number*' input field with the placeholder text 'Enter a Phone Number'. Under 'Recent', there is a message: 'No Recent WhatsApp Chats Available'. At the bottom, there is a dropdown menu with the text 'Please Choose a Template', a calendar icon, and a send button (a right-pointing arrow).

Key Outbound Message points:

- Phone field is prepopulated if texting a customer while on call, else it is empty.
- Phone number format: E164 (+14089088345, +44987345678).
- Templates enabled by the administrator come up in the dropdown.
- Agents can edit templates in the text box.

Call History

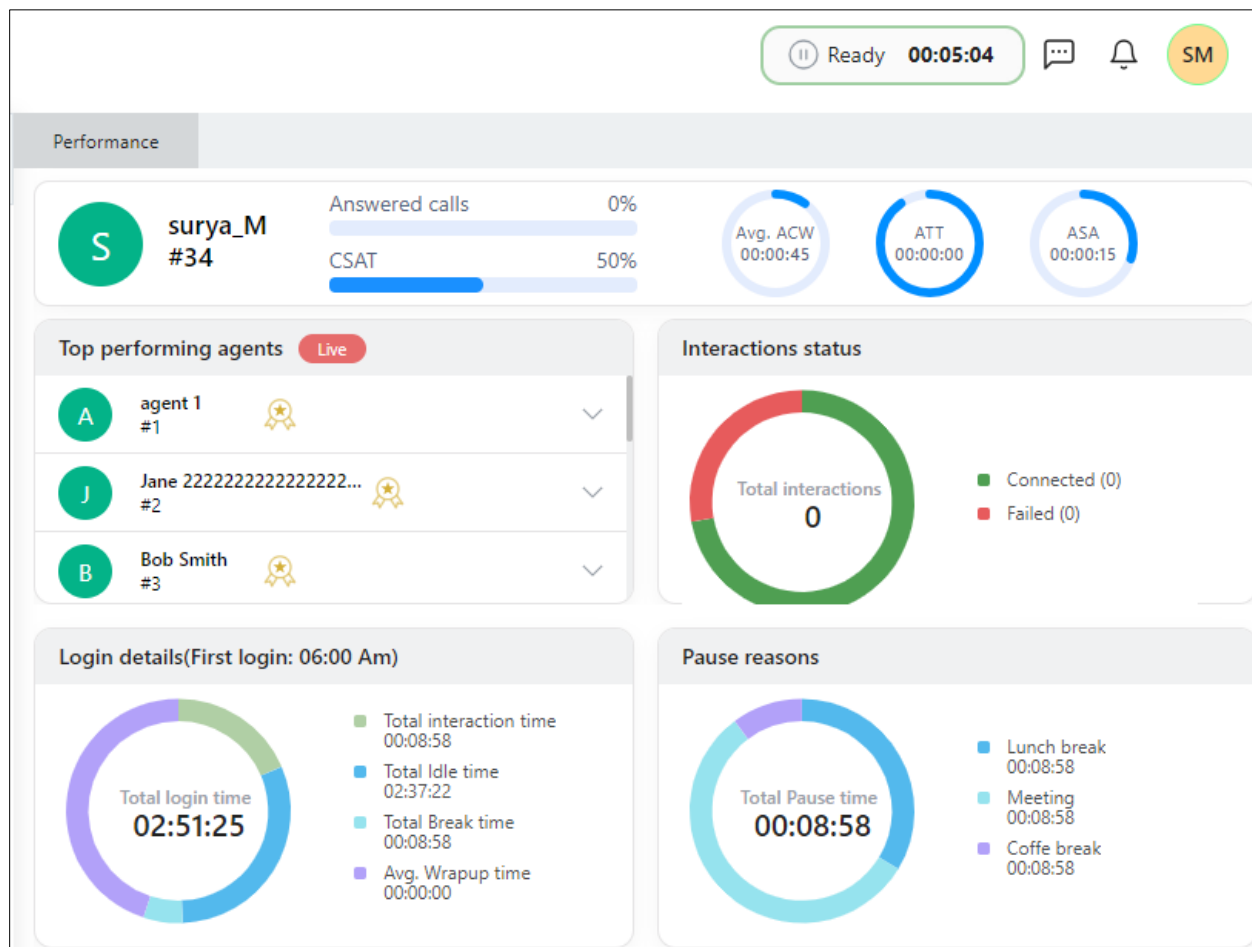
Agents can see the recent calls from customers. Contact your administrator to enable this feature.

The screenshot displays a user interface for a call center agent. At the top right, there is a status bar with a 'Ready' indicator, a timer showing '00:01:54', and icons for chat, notifications, and a profile labeled 'SM'. Below this is a navigation bar with 'Performance' and 'Call History' tabs. The main area contains a grid of eight call history entries, each in a rounded rectangular card. Each card includes a customer ID (represented by a person icon and a masked number), a status (Fail or Success with a corresponding icon), a timestamp, and a 'Details' link with a dropdown arrow.

Customer ID	Status	Timestamp	Action
02*****	Fail	16/08/2023, 03:43 PM	Details
00*****	Success	16/08/2023, 03:28 PM	Details
00*****	Success	16/08/2023, 03:19 PM	Details
08*****	Fail	14/08/2023, 05:22 PM	Details
08*****	Fail	14/08/2023, 05:20 PM	Details
08*****	Fail	14/08/2023, 05:19 PM	Details
08*****	Fail	14/08/2023, 05:19 PM	Details
08*****	Fail	14/08/2023, 05:18 PM	Details

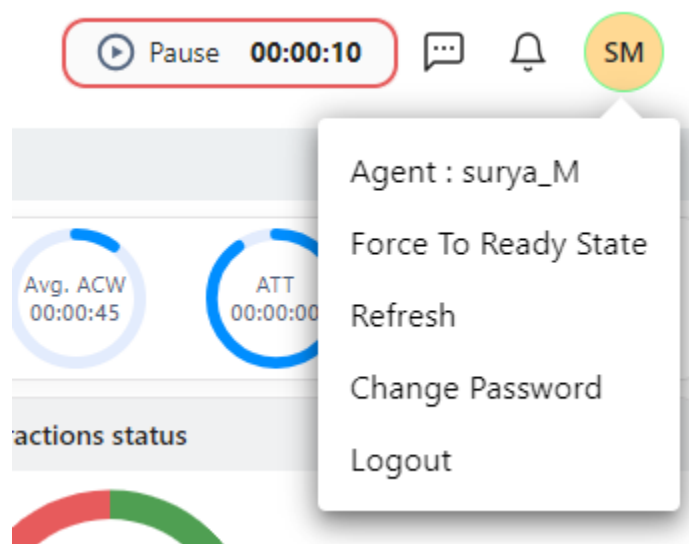
Agent Performance

Provides metrics like answered calls, CSAT, top agents, and more.



Exception Scenarios & Handling

In case of internet disruptions or issues, use the below options:

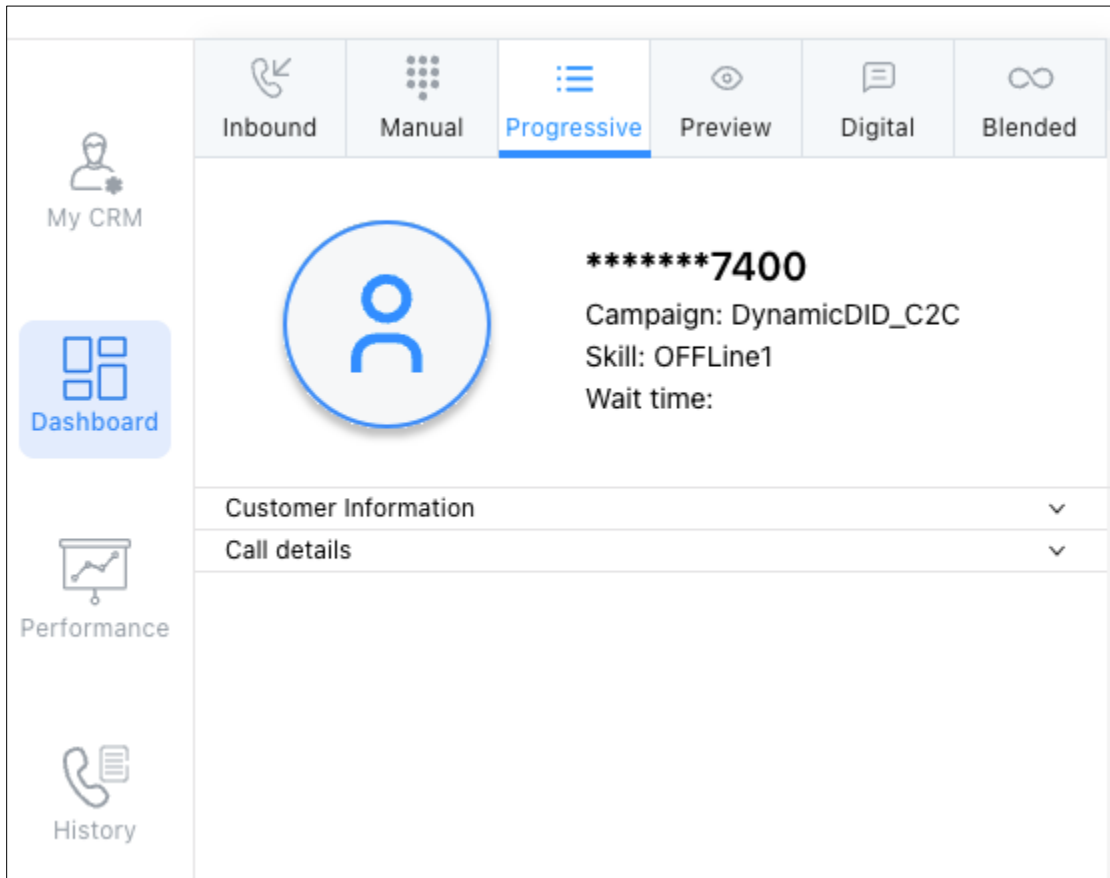


Each of the options serves a specific purpose as outlined below:

- **Force to Ready State:** Transition from Busy or ACW to Ready.
- **Refresh:** Resend events if network issues.
- **Logout:** Log out from the system.

Number Masking

Customer phone numbers can be masked in the following format on the Agent toolbar. This is applicable both for inbound & outbound scenarios.



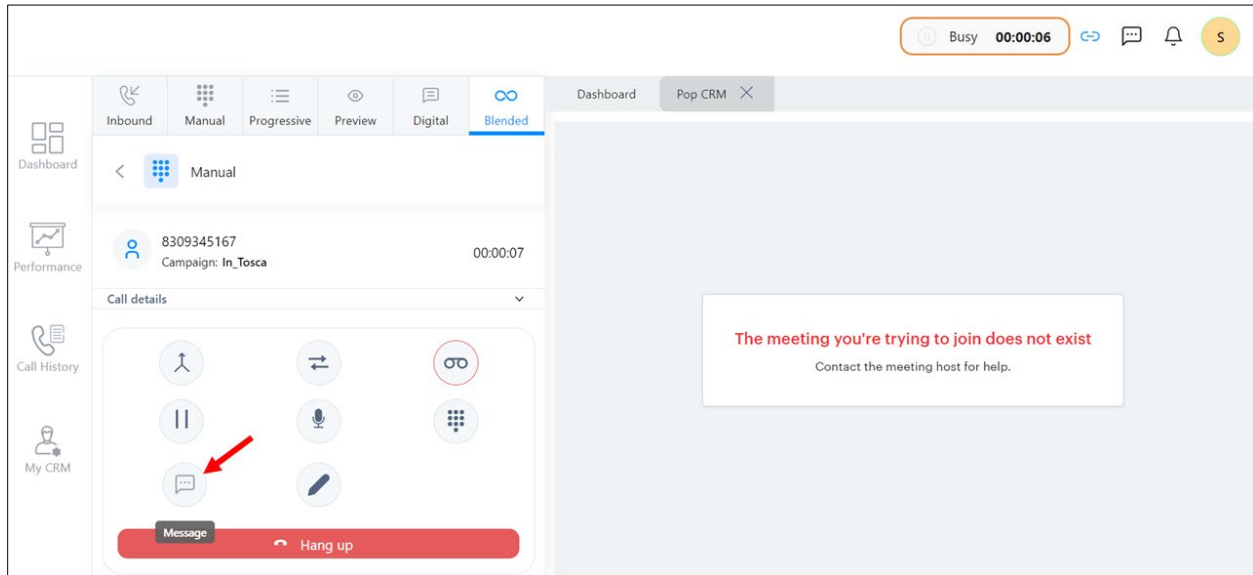
- Admin can enable this using the '*Show Customer Number from Last N Numbers*' setting under 'Admin Settings' in the Admin Guide.
 - Ex: If 'N' is set to 4 - then the last 4 digits are visible for the Agent
- This masking is applicable everywhere in the agent login wherever customer's phone number is visible

Cross-Channel Connect

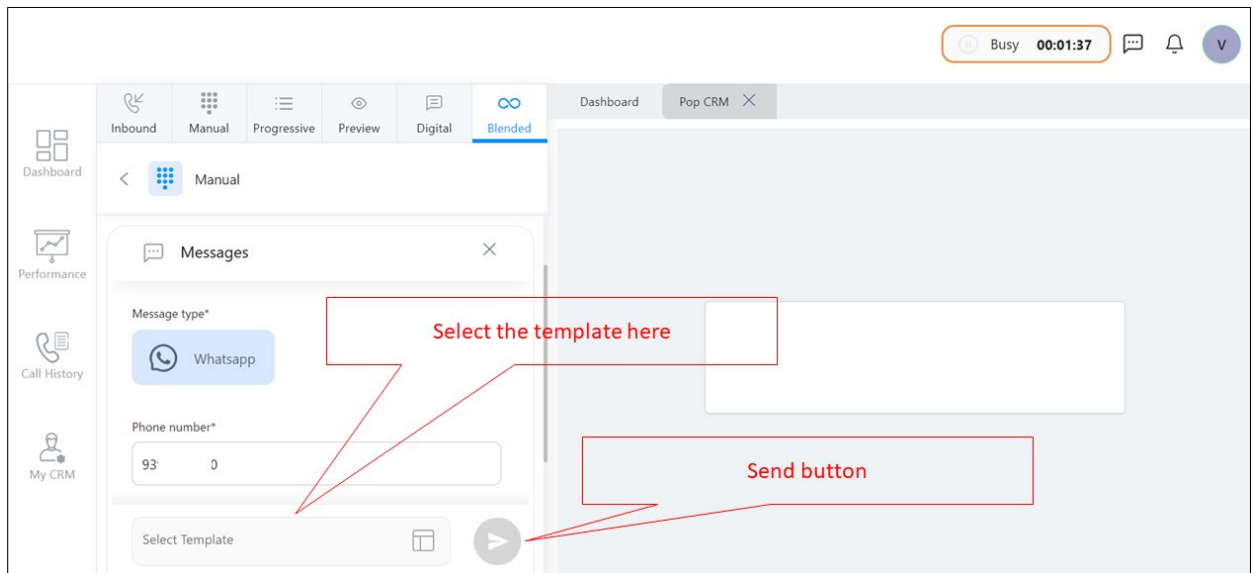
This article details the process of agents managing WhatsApp chats while engaged in a call with the same customer. This functionality works when the agent operates in blended mode.

As an agent, the following steps guide you in managing the chat while concurrently handling a call.

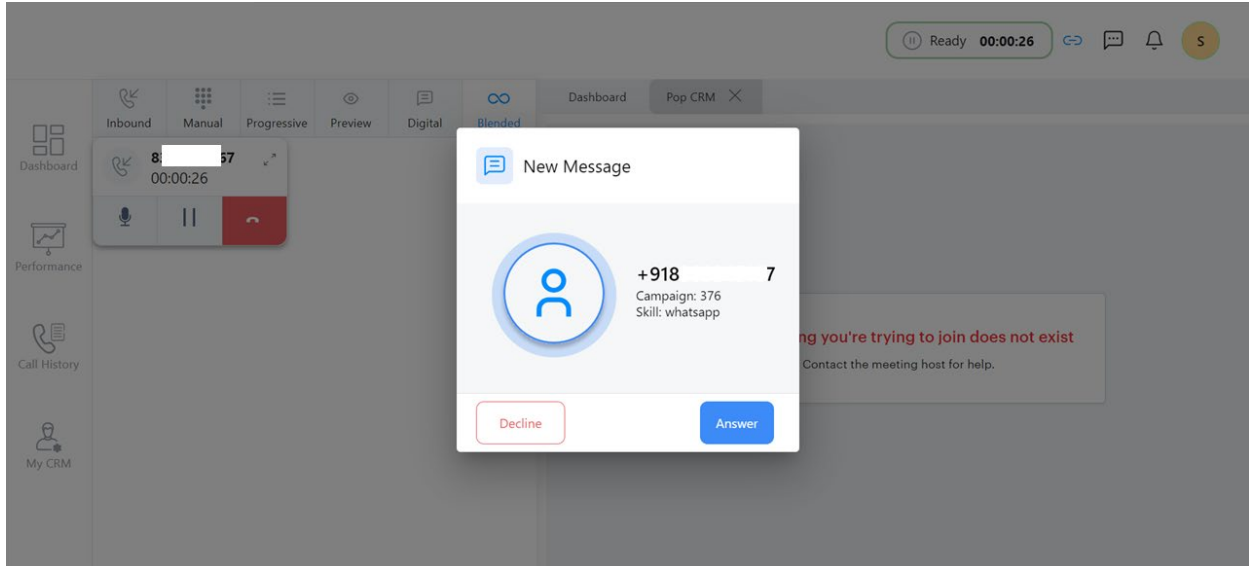
1. When operating in blended mode and connected with the customer via a call, click the 'Message' button to initiate the chat.



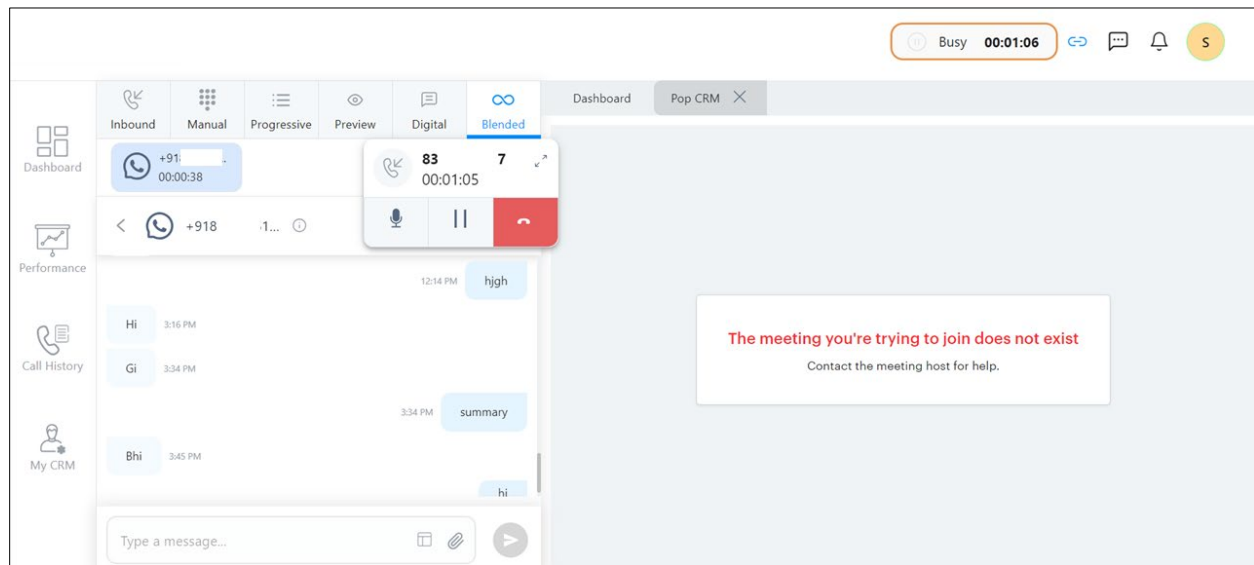
2. A pop-up window will appear with WhatsApp as the message type and the customer's number auto-populated. Choose from the pre-defined template of your preference, and then click the 'Send' button.



3. Upon the customer's reply to the chat, the agent will be notified to answer and continue the conversation.



4. While the call remains active, the agent can engage in chat communication with the customer, facilitating the sharing of files or documents.



5. Conclude the chat conversation by utilizing the designated button for disposal. It's important to note that even after disposing of the chat conversation; the call will continue to remain active.

