# 8x8 Contact Center Agent Console

**8x8** Global Cloud Communications

## Control Panel

8x8 Contact Center Agent Console enables agents to use Agent Console to manage customer interactions across all channels. Your contact center supervisor provides you with the information to log in to your Agent Console account. As an agent you may change your status to one of the following statuses:

### Agent Status

| | |
|---|---|
| **Available** | Changing your status to Available indicates you are ready to accept an interaction*. |
| **Busy** | While processing an interaction, your status changes to Busy. Incoming interactions are blocked in busy status. |
| **Post Processing** | While wrapping up an interaction, your status changes to Post Processing. Incoming interactions are blocked in this status. |
| **Working Offline** | You are working, but not available for inbound interactions except direct agent calls and transferred calls. |
| **Take Break** | Changing your status to Take Break places you on break. Indicates you are logged in but not working. You must change your status to navigate in the application. |
| **Log Out** | Logs you out of the Agent Console |

*An interaction is a call, a chat, an email, or a voicemail handled by the 8x8 Contact Center.

### Control Panel Menu

| | |
|---|---|
| **Profile** | Define agent account settings |
| **My Recording** | Record custom messages to be played to callers |
| **CRM** | Allows agents to access cases, customers, and tasks from the local CRM. |
| **Co-browsing** | Connect to a customer computer remotely for co-browsing capabilities |
| **Help** | Access information resources via FAQ (answers for most frequently asked questions), User Guide (product documentation and tutorial videos), Support (knowledge base), and Send Feedback. |

## Interaction Tabs

| | | |
|---|---|---|
| **Phone** | 📞 | Access all controls required for handling calls |
| **Chat** | 💬 | Access all controls required for handling chat interactions |
| **Email** | ✉ | Access all controls required for handling emails |
| **Status** | 👥 | View the real time status of agents and queues using the directories. |
| **Notices** | ⓘ | Access messages broadcast from your contact center supervisors |
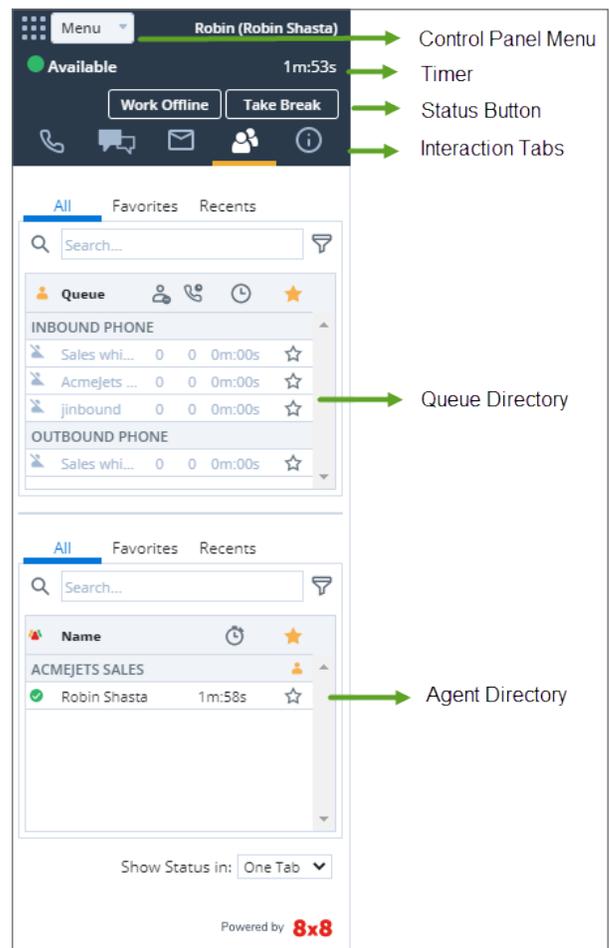


**Agent Console - Control Panel**

**Timer:** Indicates how long you have been in a given status.

**8x8**

# Common Tasks

## Changing your agent status

1. Select the desired status button in the Control Panel.

2. If the status button shows ▼, you are prompted to select a status code.

3. Select an appropriate code that indicates the reason for status change.
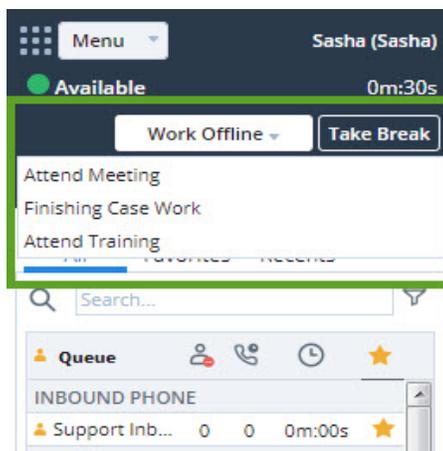


## Handling Phone Connection Modes

With Persistent Connection Mode, Agents remain connected to the system until logged out. They respond to calls with a simple click on the user interface. On Deman Connection Mode, however, provides a temporary connection to the system and requires agents to manually accept the call on their soft or hard phone every time a call comes in.

**Persistent Connection Mode:**

If enabled by your administrator, your account may open on the Persistent Connection Mode. To continue:

1. Change your status to Available.

2. Answer the phone call to receive a four-digit PIN code.

3. Enter the PIN at the prompt and click Confirm. It may take a few seconds. The PIN is valid for the current session only.
   Note: There is no audio prompt or audio indication for Persistent Connection Mode.

**On Demand Connection Mode:**

If permitted by your administrator, you may be able to change your connection mode to On Demand instead of Persistent. To continue:

1. Change your status to Work Offline.

2. Go to Menu > Profile > Personal.

3. Change your phone connection mode to On Demand and Save.
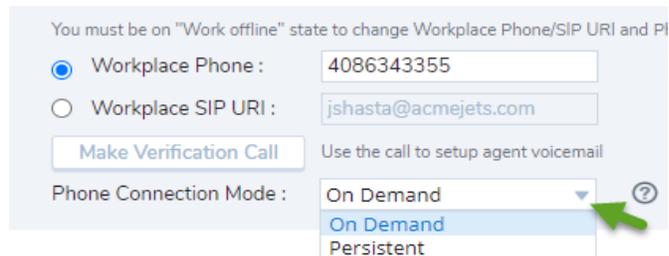


## Setting up your phone number

1. Click Profile from the Control Panel menu.

2. In the Personal settings, enter a workplace phone number or SIP URI.

3. Click Make Verification Call to verify the phone number.

4. Make sure the phone number is in the right format and Save.

## Validating workplace setting

If enabled by administrator, you must validate the changes each time you enter new information such as a new number in your workplace setting.

1. Change your status to Work Offline.

2. Go to Menu > Profile > Personal.

3. Click Validate next to the updated field.

4. Answer the validation call for new setting to receive a four-digit PIN code.

5. Enter the PIN at the prompt and click Confirm. The new change is validated and auto saved.

6. Make a verification call to verify the phone number.

## Using status codes

Status codes are defined by your administrator and describe the reason for your status change.

1. Select a status change button.

2. From the drop-down of status codes, select an appropriate code.

## Handling calls

- Outbound: To dial out, enter a phone number in the phone field and click Dial. Your phone rings first. Answer your phone to initiate the call or click a phone number in the CRM record to automatically dial out.

- Inbound: When an inbound call is offered to you, the Phone tab blinks red and your phone rings. Answer the phone to accept the call.
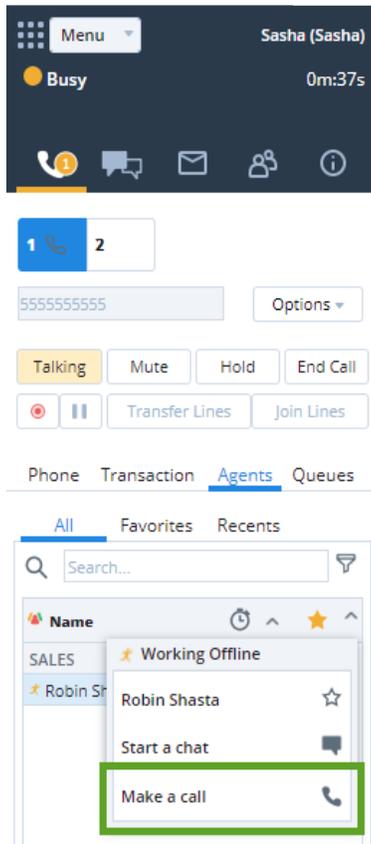


## Transferring a call

You can transfer a call to another agent, a queue, or an external party. During an active call, announce to the caller about the intended transfer.

**To an agent:**

- Blind Transfer: Click Agents tab to view the status of other agents in the Agent Directory. Select an agent and click Blind Transfer. The call is transferred to the selected agent.

- Consult Transfer: Switch to line 2, select an available agent in the Agent tab. Click Make a call from the context menu. Once the call connects, click Transfer Lines for a warm transfer.

**To another queue:**

1. In the Queue Directory, check the status of a queue to transfer the call to.

2. Select a queue and click Transfer.

**To an external party:**

1. While on an active call on line 1, switch to line 2.

2. Enter the phone number in the phone field. Click Dial.

3. Wait for the party to answer, then click Transfer Lines.

## Setting up a conference

1. During an active call on Phone Line 1, announce to the caller about the intended conference.

2. Switch to Phone Line 2 and call the desired third party.

3. Wait for the party to answer, click Join Lines.

## Checking the status of other agents and queues

Status tab  provides real time status overview of queues and fellow agents.

- Queue Status: Click the  tab and then click the Queues tab to view the status of queues you are a member of.

- Agent Status: Click the  tab and then click the All tab to view the status of agents in your agent group.

  ✓ - Available;  ● - Busy;  ↗ - Working Offline;  ☕ - On Break;  ✉ - On Email;  ⊘ - Logged out

Favorites: Bookmark frequently-used queues, and agents you interact with most often.

Recents: View the status of queues you have previously transferred calls to; view agents you have initiated interactions with.

## Using transaction codes

When you end an interaction, you may be prompted to select transaction codes. These codes are configured by your administrator and describe the outcome of an interaction. Select an appropriate code from the list and click Save.
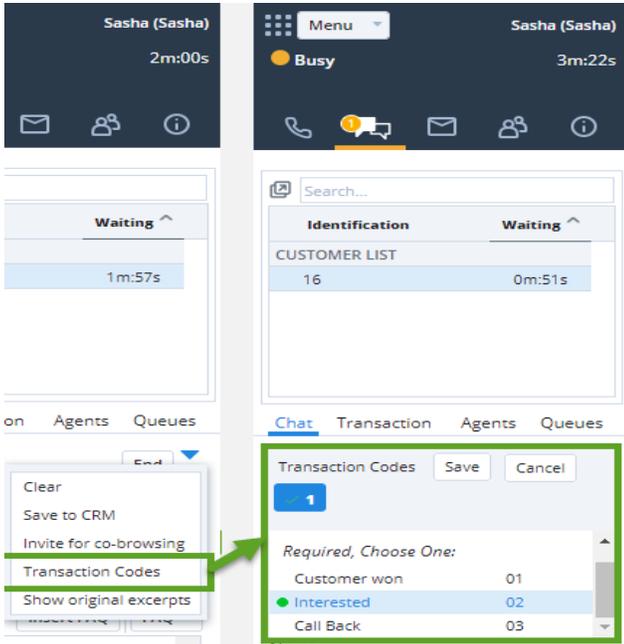
## Handling a chat

When an inbound chat is offered to you, the Chat tab  blinks red. Click **Accept** button. A chat session is established. After processing the request, click **End Chat**.

## Inserting FAQs in a chat

During an active chat session, you can insert information by browsing through the  FAQ knowledge base or by referring to a specific shortcut. In the Insert FAQ entry box, enter the desired shortcut.  A link to the FAQ inserts in the chat. Click **Send**.
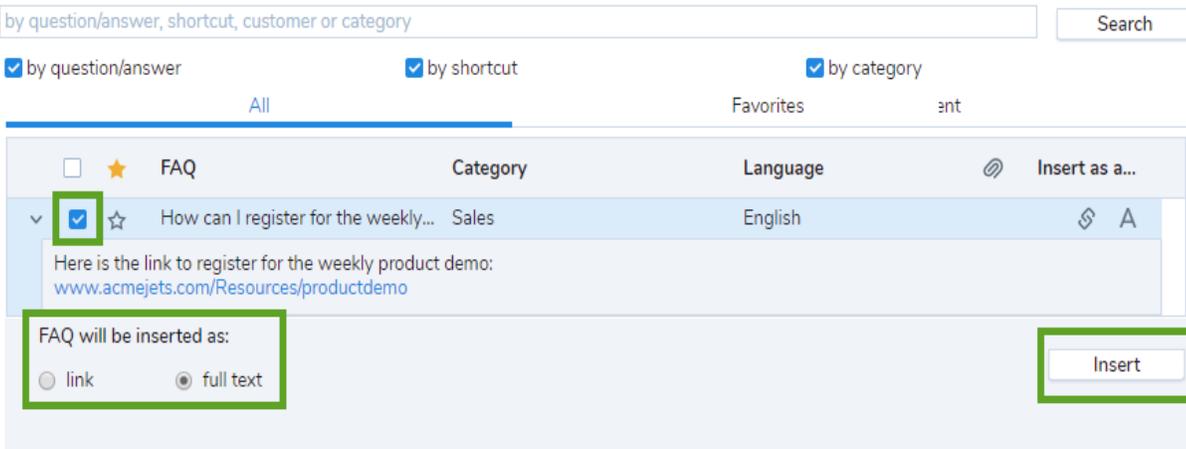
## Accepting an email

When an inbound email is offered to you, the Email tab  blinks red. Click **Accept Email**. The inbound email creates a case. To process the email, click **Reply**. After processing the request, click **End Post Processing**.

## Agent-to-agent call or chat

- To call another agent, check the agent's status in the **Agents** tab. Select the agent and click **Make a call** from the context menu,

- To chat with another agent, check the agent's status in the **Agents** tab. Select the agent and click **Start a chat**.

## Platform Switch

When you receive platform switch notification, stay logged in until you finish your current phone call. After the final notification, you have ten minutes to log out. Log Out and log back in.