QUICK INSTALL GUIDE

Virtual Contact Center Agent Console

8x8 Global Cloud Communications

Control Panel

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 Virtual Contact Center.

Access VCC Analytics

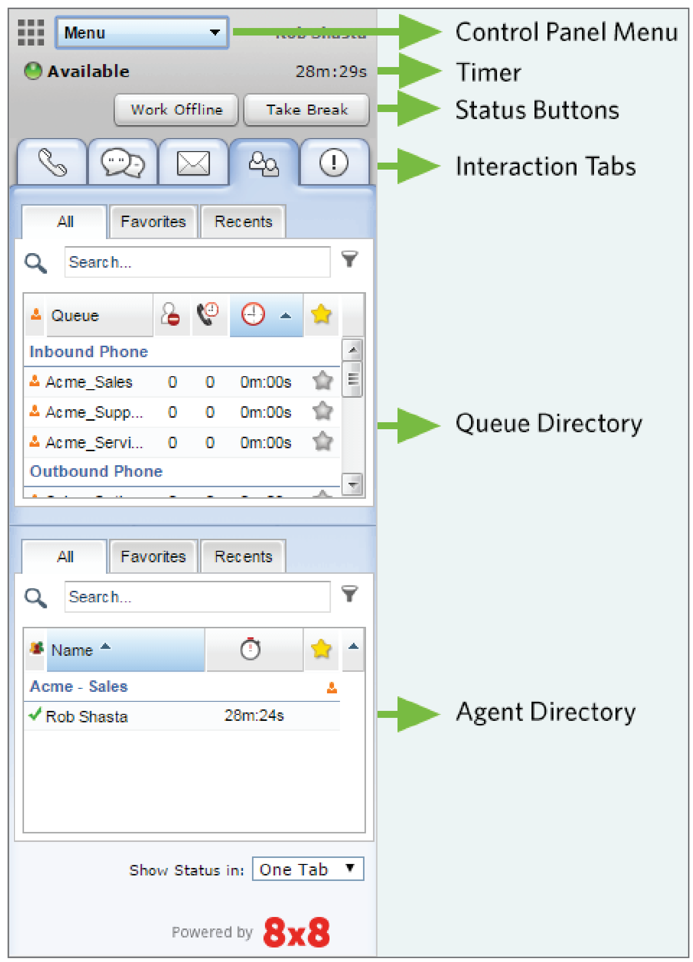
From the **Control Panel**, click ▦, then click **Business Intelligence** to launch the 8x8 Virtual Contact Center Analytics tool. You can see your performance metrics and assess your productivity.

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.
Collaborate	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), and **Support** (knowledge base).

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.

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.

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**.

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.