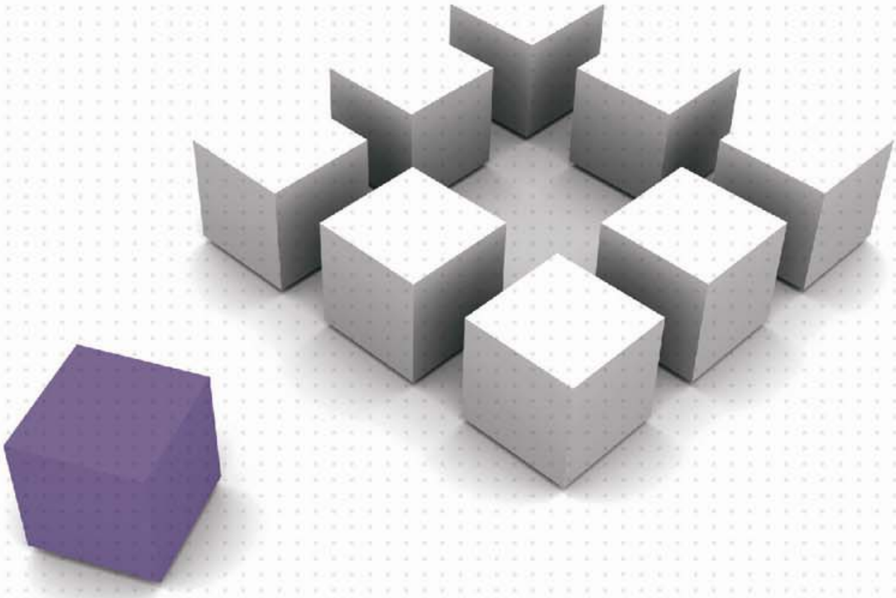

InConcert Allegro

Agent
Manual

inConcert
CONTACT CENTER TECHNOLOGY

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Agent's Interface

InConcert Agent is the software module that the different agents will use in their work for the Contact Center. The software is compatible with Windows XP, Windows Vista and Windows 7.

The agents can have a software based phone, or a regular phone connected to the computer.

The InConcert agent module is easy to use, with a friendly interface. It allows the use of multiple functionalities and several varieties of interactions with the client; this allows higher performance standards and more efficiency.

Login

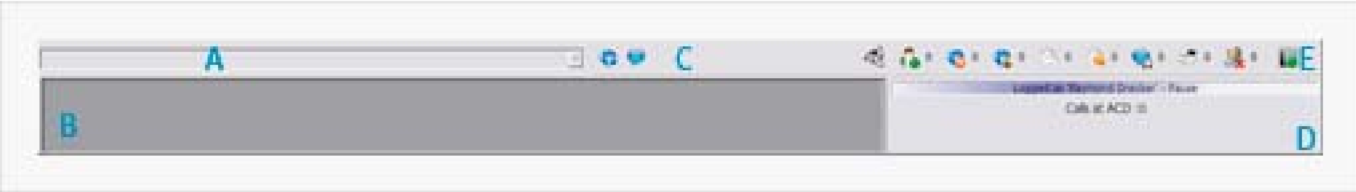
After the agent starts the Bar Agent application, the software will prompt him to login to the system. Each agent will have a Username and Password previously assigned by the administrator.

- **Username**: type the username assigned by the administrator, indicating the Virtual Call Center by adding a '@' followed by the name of the VCC.
- **Password**: the administrator will allocate a password for each agent.

The username field is not case sensitive, while the password field is.

To change the agent's password please see page 11 of this manual.

Basic Layout



This is the basic layout of the agent's bar.

It's composed with three modules in the upper part:

- Active interaction list (A): located to the left, it shows a list of the active interactions of the agent. An interaction is active as long as the agent has not completed the necessary steps to finish it.
- Interaction Tray (B): located in the lower side to the left, this tray contains the interactions that need further processing.
- Function bar (C): this contains the buttons the agent needs in order to carry out the different interactions with clients.
- Additional information (D): located in the lower side to the right, it will show additional information about the agent, number of calls on hold, the amount of time the agent has been on the phone, etc.
- Interaction Information bar (E): located to the right, it contains different icons with information on the current state of different interactions.

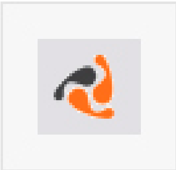
Note

Once logged in, the system will set the status to "Pause" by default. In order to begin the interactions process, the agents will need to deselect the "Pause" status by clicking on it once.

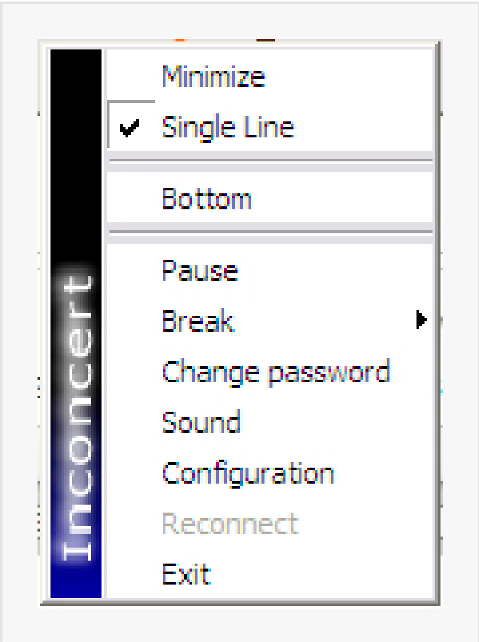
Main Menu

This is the icon that represents the main menu of the Agent’s bar.

By clicking this icon, the agent has access to:



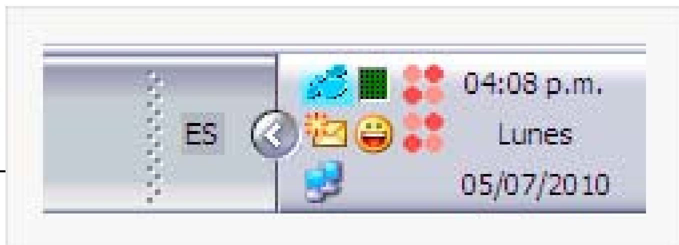
- Minimize the bar
- Keep it in a single line
- Move it to the bottom or the top of the screen



- Set a pause
- Set a break
- Change password
- Configure sound preferences
- Configure the service for one server or another
- Reconnect
- Exit the application

Minimize

This command will minimize the application. The Bar Agent will be then accessible



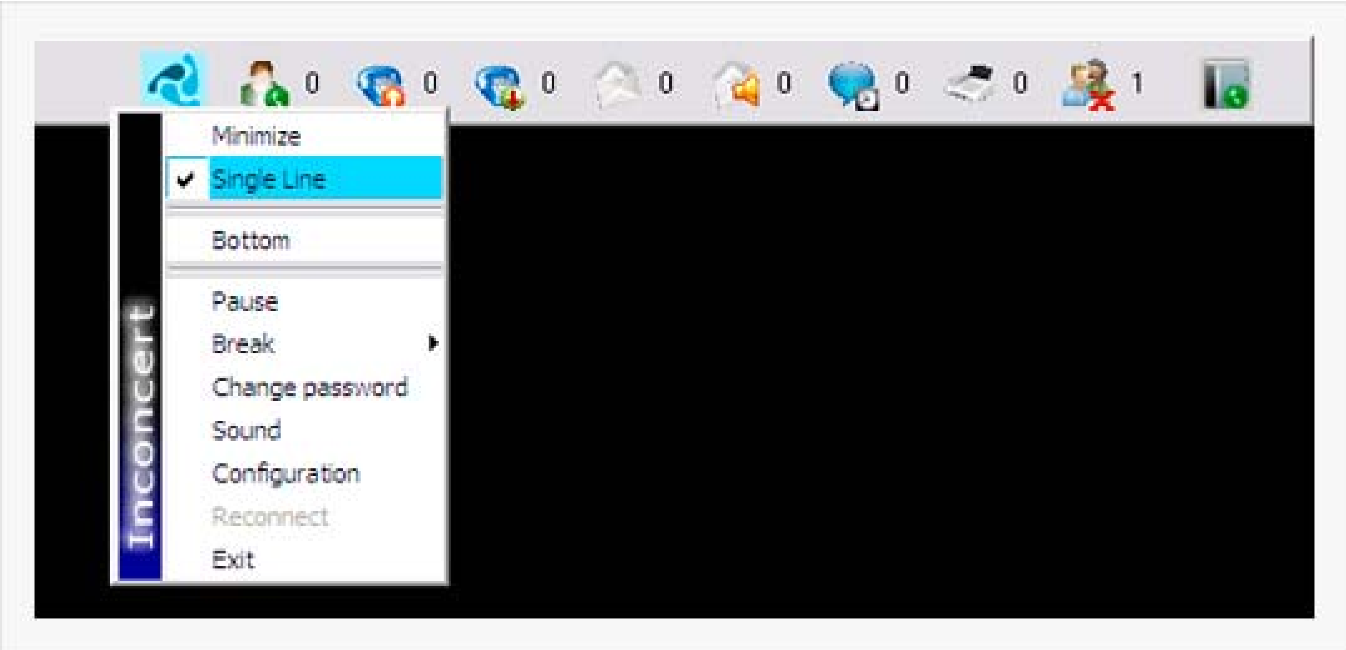
through an icon placed in the notifications area, next to the clock.

As shown in the picture, the icon appears next to the other icons in the notifications bar.

Single Line

To maximize the working space, the agent can set the bar to show only the line with the buttons. This is called single line and can be achieved by clicking on the logo button, and selecting “Single Line”.

Bottom/Top



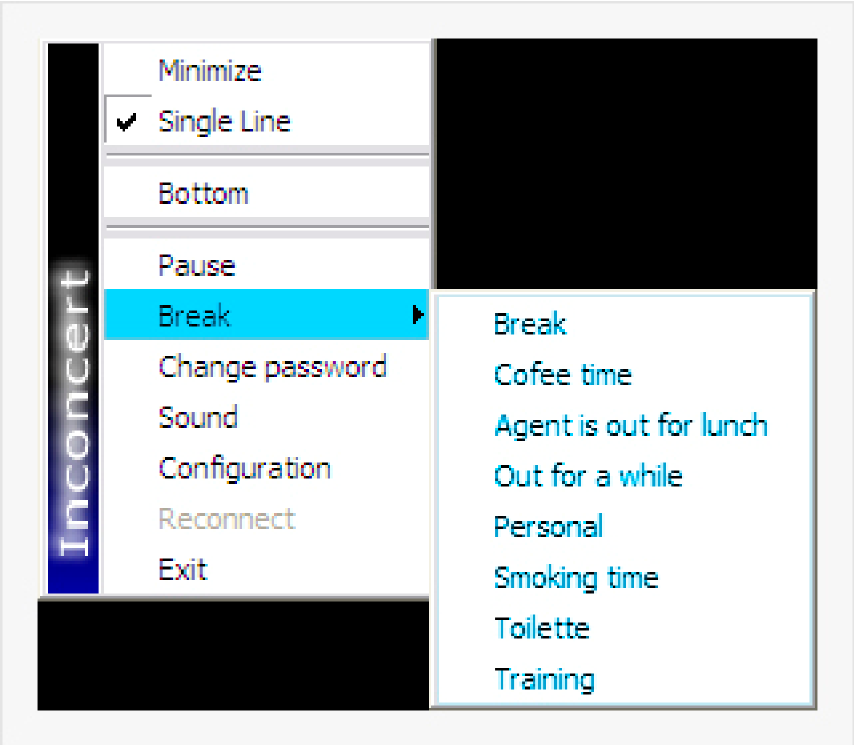
By checking this option on the main menu, the bar will be moved to the top of the agent’s screen, or to the bottom. Of course, the options are mutually exclusive.

Pause

If the “Pause” line is checked, the agent is not available for interactions.in this case, when the agent is in pause, he can perform other tasks, but not receive inbound interactions. Being in pause means the agent is available for work, even though he will not be accepting incoming interactions.

When on a break, of any kind, the agent is NOT available to do any sort of work.

Break



The agent can take several kinds of breaks, that are set by default in the system, or that can be configured by the administrator during the set-up process of the VCC.

The different kinds of breaks are set up by the administrator during the creation of the VCC. It's very important that the agent sets the correct break status when he is away of the computer, since all the data collected will appear in the reports.

Once the agent selects one of the break status, all the functions of the Bar Agent are disabled.

Change Password

The agent can also change his password by clicking on the “Change Password” option. Once clicked, the system will prompt the agent to write the old password, and the new one twice.

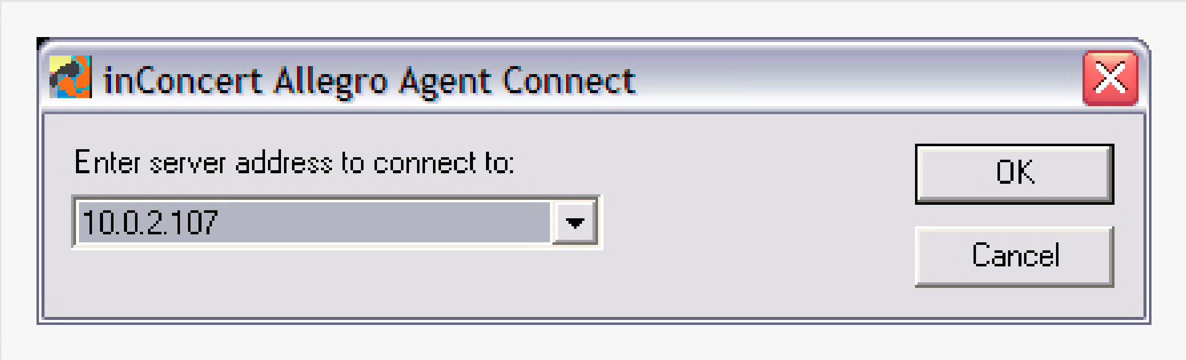
Once accepted, the system will be accessible for the agent only with the new password.

Please contact the administrator if you have any problem with your password and or username.

Sound

Enables or disables notification sounds. For example, if there is an incoming call the agent will hear a notification if the sound is enabled.

Configuration



This option enables a prompt that lets the agent choose a server to work in. The servers are identified by their IP address.

Reconnect

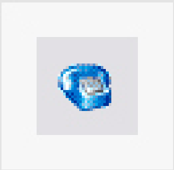
In case the agent loses connection with the server, clicking on this button starts the reconnection process. In this case, the system will not prompt the user for the Username and Password again. It's important to notice that this reconnection will be with the same server that was configured for the interactions. If the agent needs to connect with other server, then he has to configure that in the "Configuration" menu.

Exit- Log Out

Exits the application and the bar agent is closed. Also the agent is logged out. If the agent has active interactions in the moment of exit, the system will not complete the logout process until the agent finishes the interactions.

Buttons

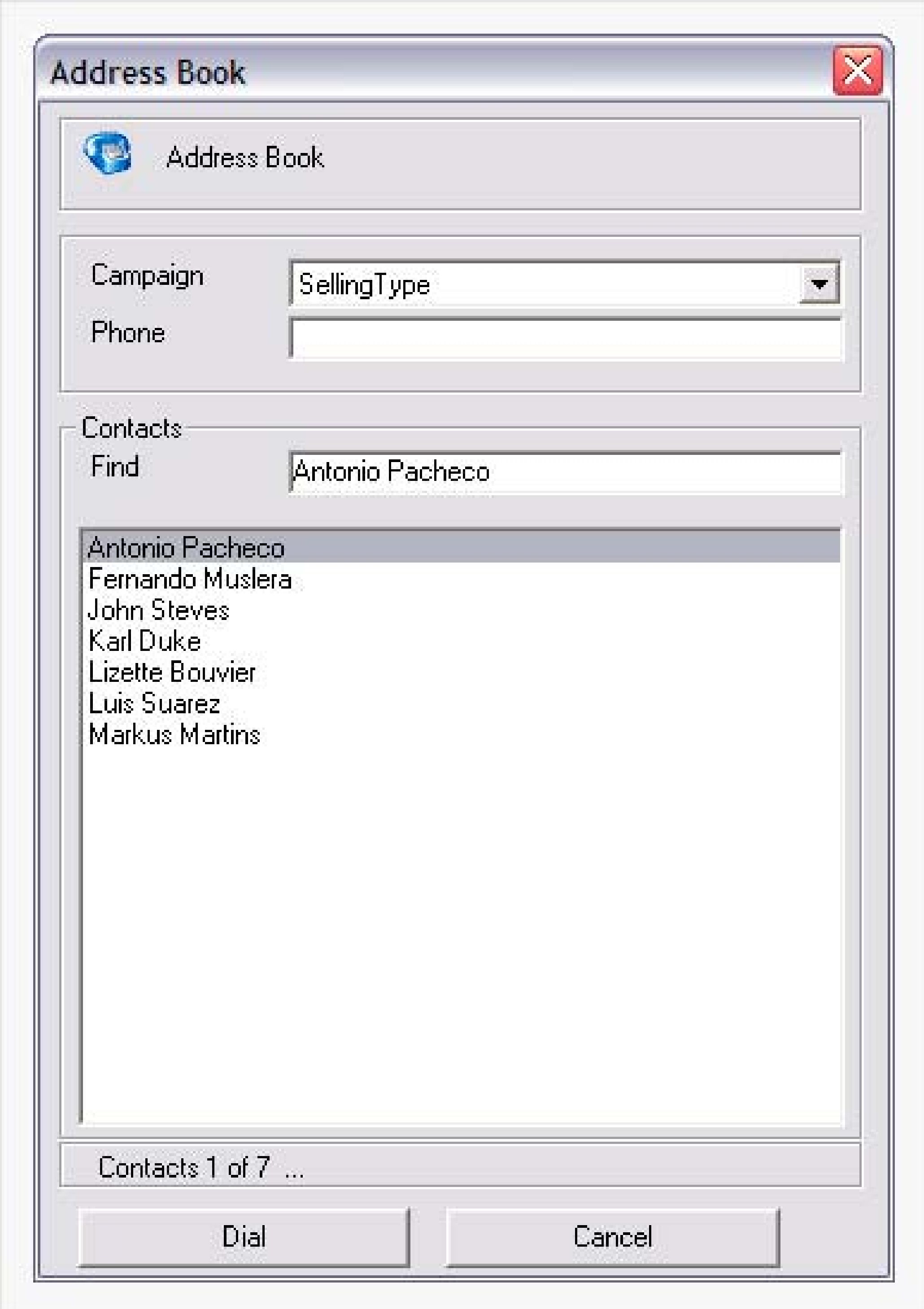
Make a call



This button enables the agent to make a call to a given number. Once clicked, the system will prompt the agent with a contact list.

The contact list was imported by the administrator during the set-up of the Contact Center.

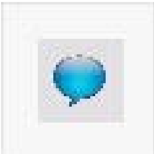
Each campaign can have its own contact list.



To make a call the agent simply has to select the contact he wants to reach, and click on the dial button.

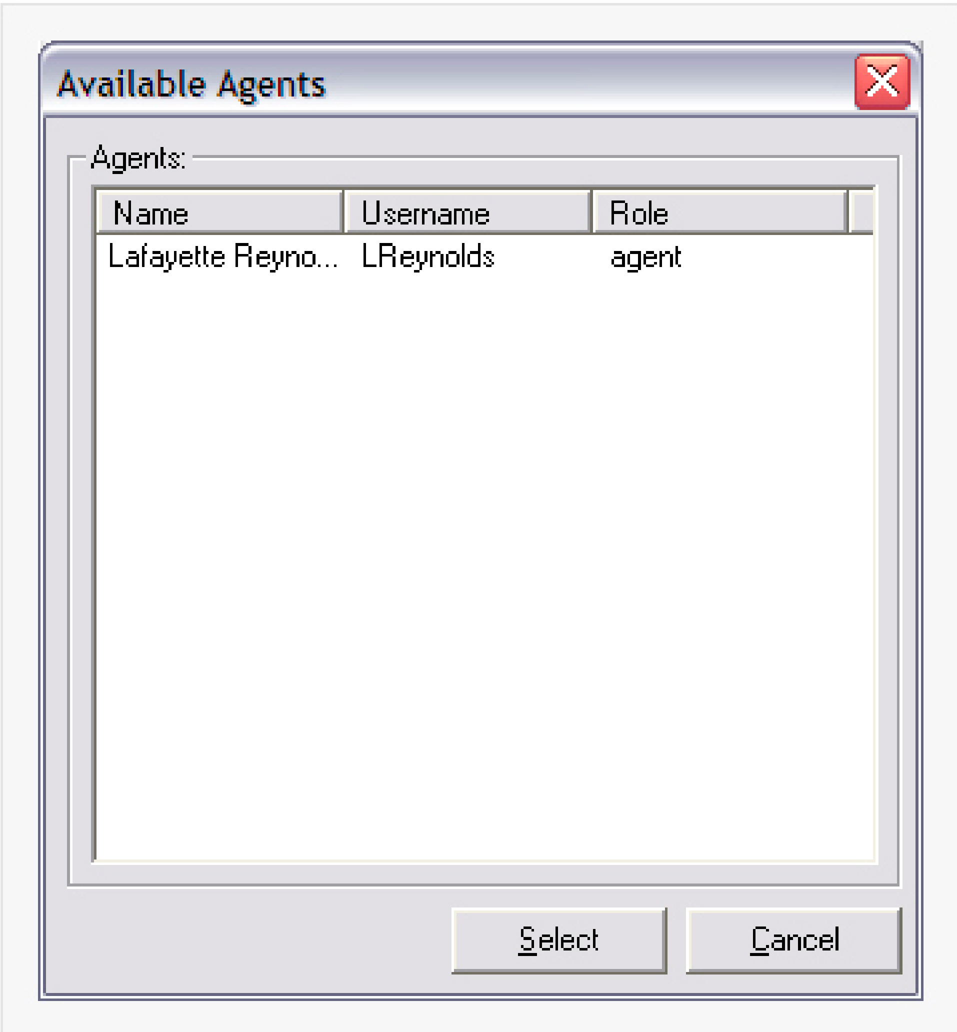
Once the communication has been established, the buttons in the Button Bar will change, giving the agent a number of options to process the call.

Open a Chat Session

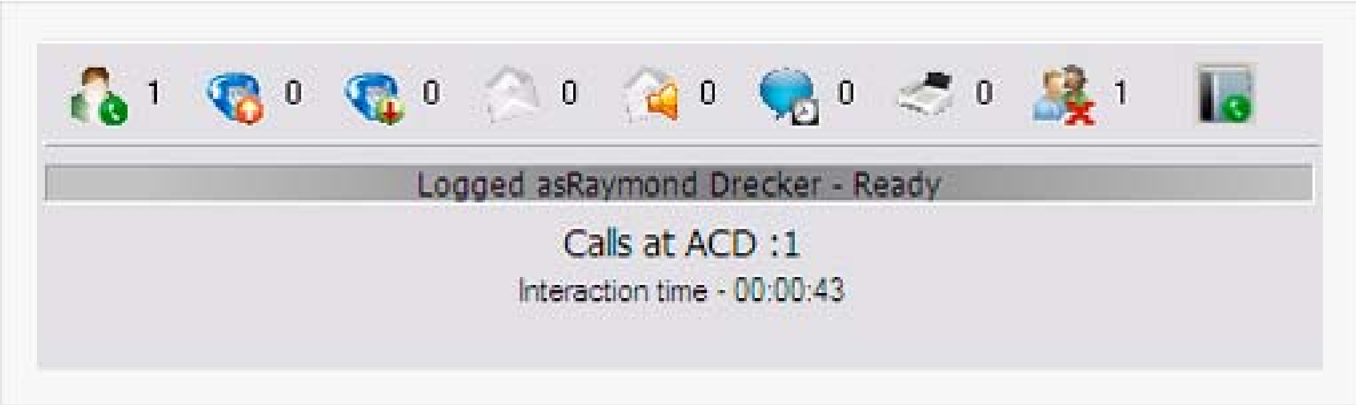


This button enables the agent to open a chat session with another agent. Once clicked, the system will prompt the agent to choose from a list of other agents which one will be the recipient of his chat messages.

This tool is useful for agents who need to consult another agent during the time they are answering a call. In order to be operational, this function needs special authorization from the administrator, who needs to check “Allow chat between agents” while configuring the campaign.



Interaction Information Bar



In the interaction information bar the agent is able to track the status of the different interactions he participates in.

The image shows the Interaction Information Bar on top, and the “Additional information tray”.

In the “Interaction Information Bar” we can see several icons representing the different status for the agent of all the possible interactions.

The buttons in the “Interaction information bar” group the different items present in the Interaction Tray. The interactions are sorted here by type.

Number of ACD CALLS

It’s the number of calls waiting on the ACD (these are queued calls) for the agent to answer.While the agent is active (not on pause), he will be able to answer the calls on hold. If for example, there are 20 agents and 50 incoming calls at a given time, then the ACD number will be 30, because the available agents will answer 20 calls, while 30 remain on hold.

Incoming Calls

Shows a list of all the queued incoming calls outside the ACD. These calls will be answered when the agents click on the “Take First” button, appearing in the “Function bar”.

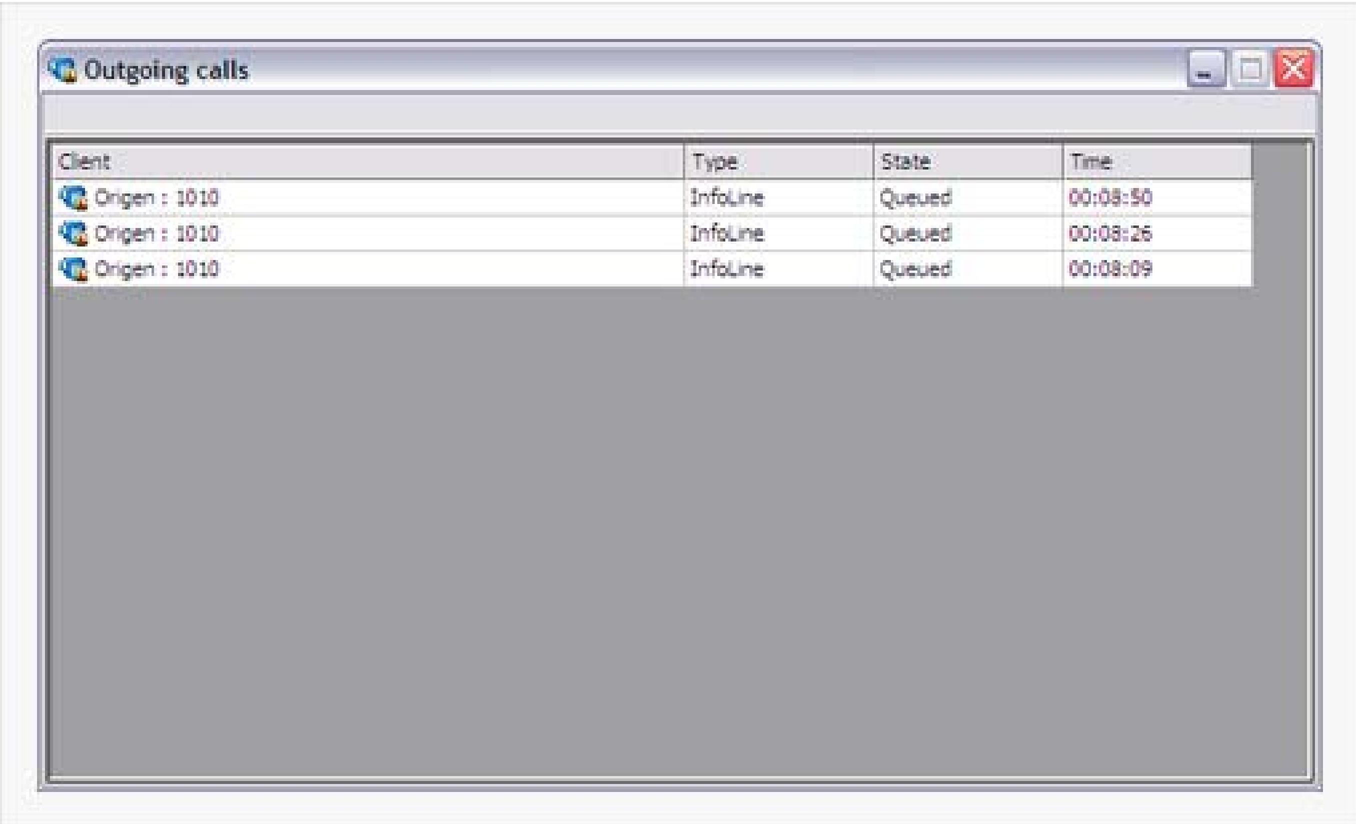
Outgoing Calls

Shows a list of the scheduled outgoing calls the agent has to perform.

When this button is pressed, the agent is prompted with a window that lists all the scheduled calls he has to make.

This list has four fields: Client, Type, State and Time.

The agent can then sort the calls by any of the fields in the list.



In “Client” the agent can visualize the origin of the call, this is the telephone number from which the call was made. In this case, the number is 1010; but it could be, for example, 01 297 555 645.

In “Type” the system indicates to which campaign the call belongs. In this case the corresponding campaign is “InfoLine”.

The “State” of each call indicates if there’s a call scheduled for that client or not. In this case, the calls have been scheduled, so in the list the word “Queued” appears.

In the “Time” column, the system indicates the amount of hours, minutes and seconds (hh:mm:ss) that have elapsed since the client made the call and reached the system.

Mail

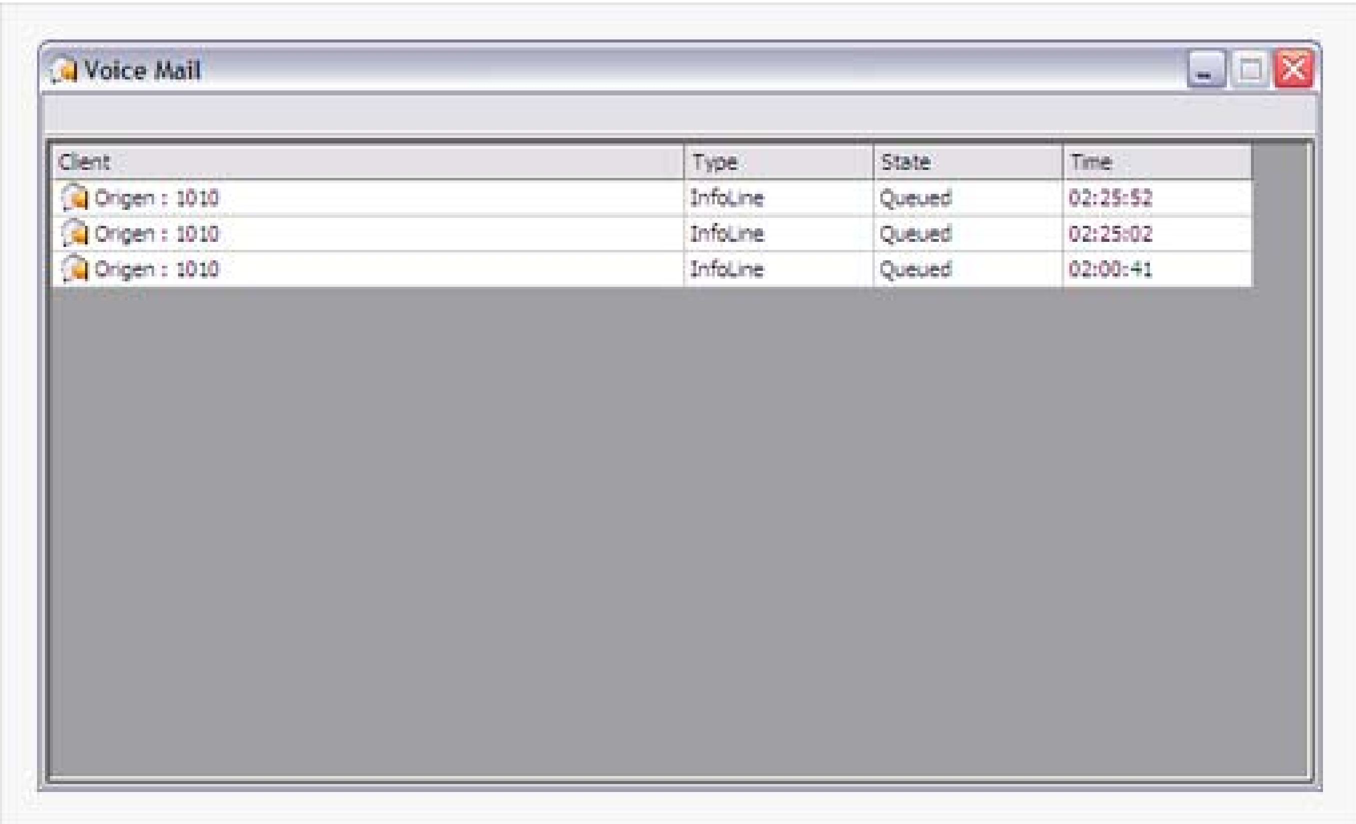
This button shows the queued mail interactions for each agent.

When clicked, the system displays a list of the emails the agent has received, showing the fields of “Client”, “Type”, “State” and “Time”.

All the fields in this case are exactly the same as in Outgoing Calls, with the exception of “client”, which in this case shows the client’s email.

Voice Mail

This button shows the number of voice mail messages the agent has to listen. Voicemails are configured by the administrator at the time of the creation of the campaigns. There is an option that allows clients to leave a voicemail after a certain amount of time has elapsed since the system accepted the call.



The list of voicemails is divided in the same fields as the Outgoing Calls list.

In “Client” the agent can visualize the origin of the call, this is the telephone number from which the call was made. In this case, the number is 1010; but it could be, for example, 01 297 555 645.

In “Type” the system indicates to which campaign the call belongs. In this case the corresponding campaign is “InfoLine”.

The “State” of each call indicates if there’s a call scheduled for that client or not. In this case, the calls have been scheduled, so in the list the word “Queued” appears.

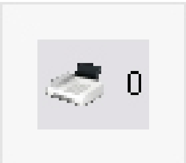
In the “Time” column, the system indicates the amount of hours, minutes and seconds (hh:mm:ss) that have elapsed since the client made the call and reached the system.

Chat

The chat button opens a window with a list of all the chat interactions for the agent.

The button also shows how many chat interactions need the agent’s intervention.

Fax



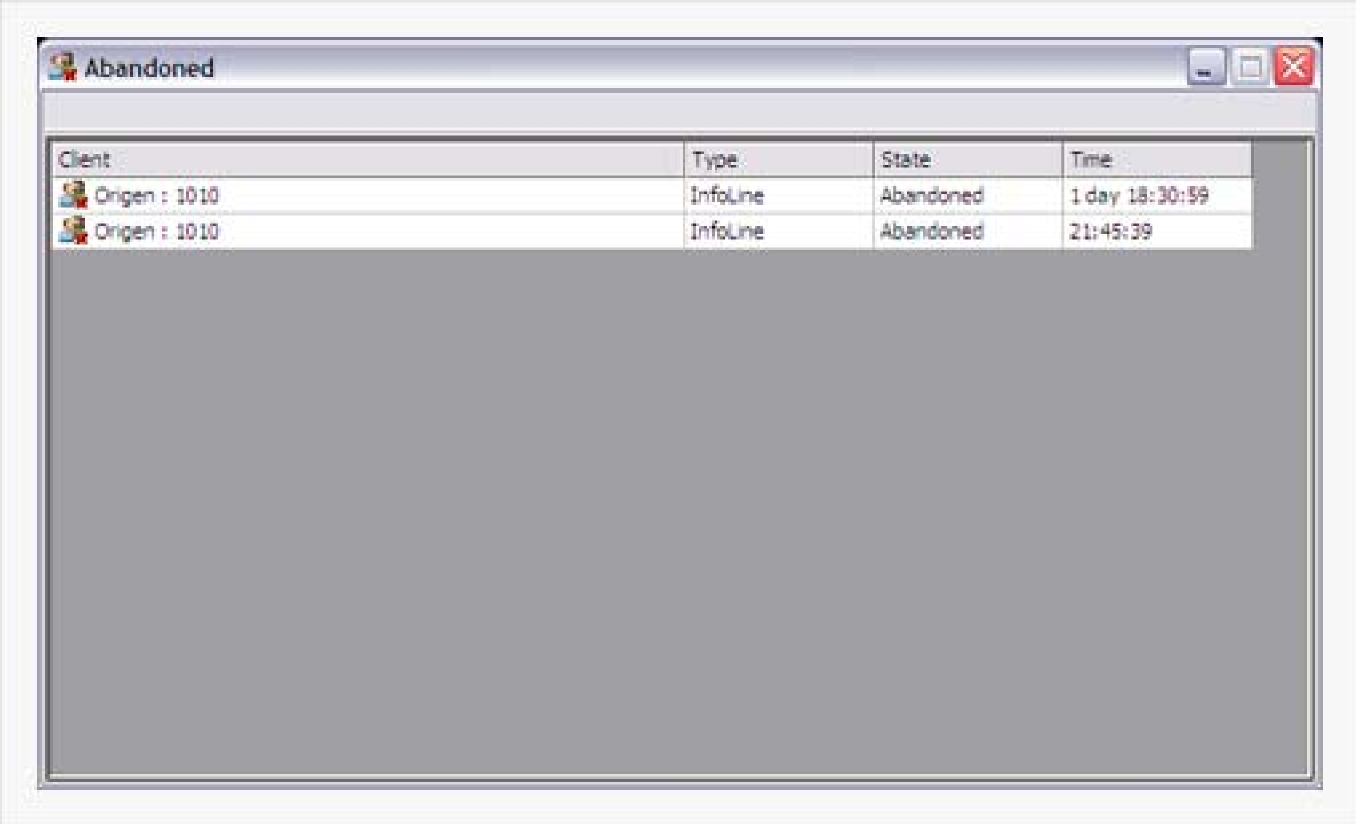
Is the number of fax interactions the agent has to carry out. It refers to the amount of faxes the campaign has received.

Abandoned

This button shows the number of callers who hung up while on hold.

These callers are people who hung up because the answering process is too slow for them. The aim is to minimize the number of abandonments, since each abandonment represents a potentially unsatisfied customer.

The button activates a window with a list of all the abandoned calls.



The list of abandoned calls is divided in the same fields as the Outgoing Calls list.

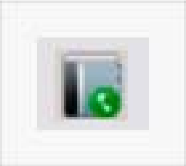
In “Client” the agent can visualize the origin of the call, this is the telephone number from which the call was made. In this case, the number is 1010; but it could be, for example, 01 297 555 645.

In “Type” the system indicates to which campaign the call belongs. In this case the corresponding campaign is “InfoLine”.

The “State” of each call indicates if there’s a call scheduled for that client or not.

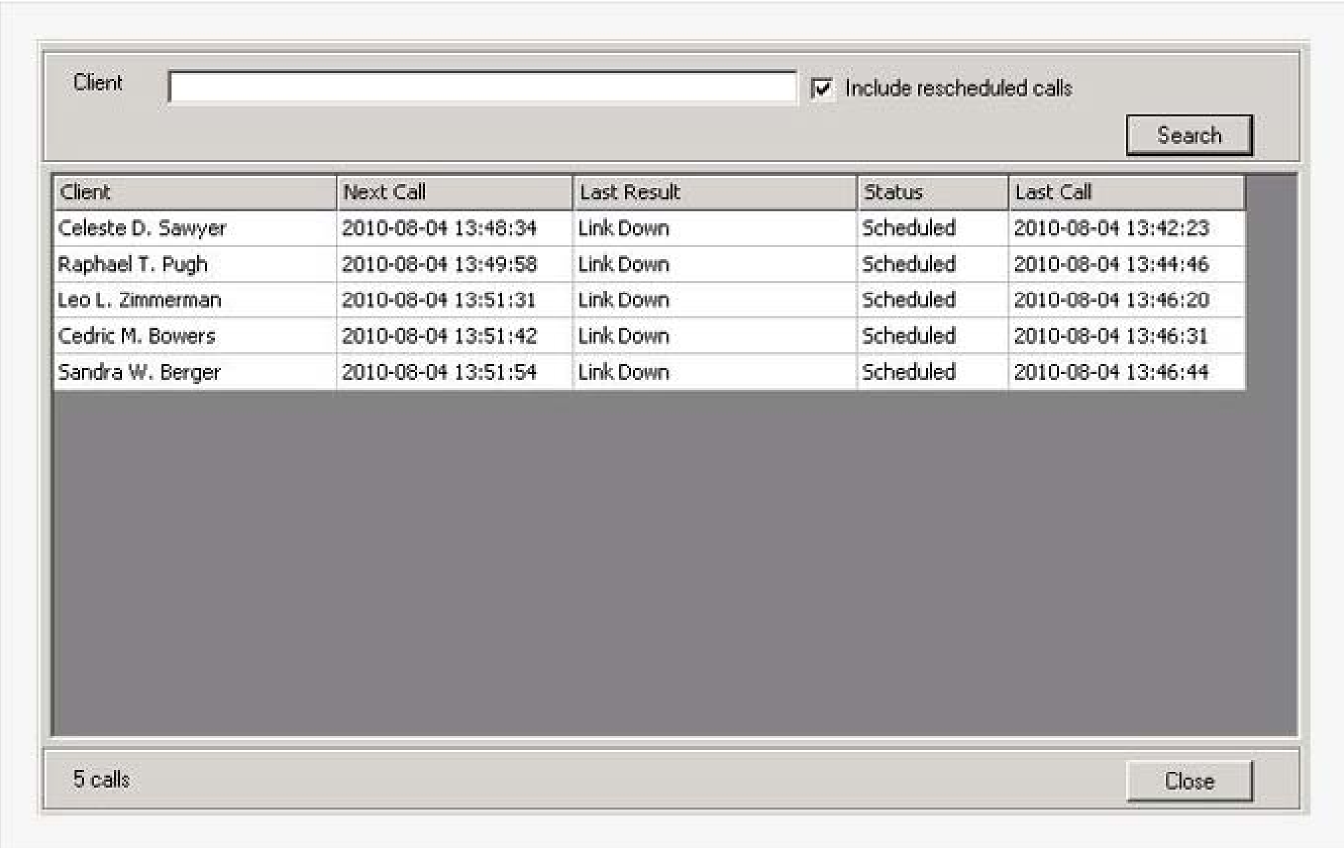
In the “Time” column, the system indicates the amount of hours, minutes and seconds (hh:mm:ss) that have elapsed since the client made the call and reached the system.

My Dialer Scheduled Calls



This button displays a list of scheduled calls for the agent by the automatic dialer.

The system will display a list of scheduled calls for the agent.

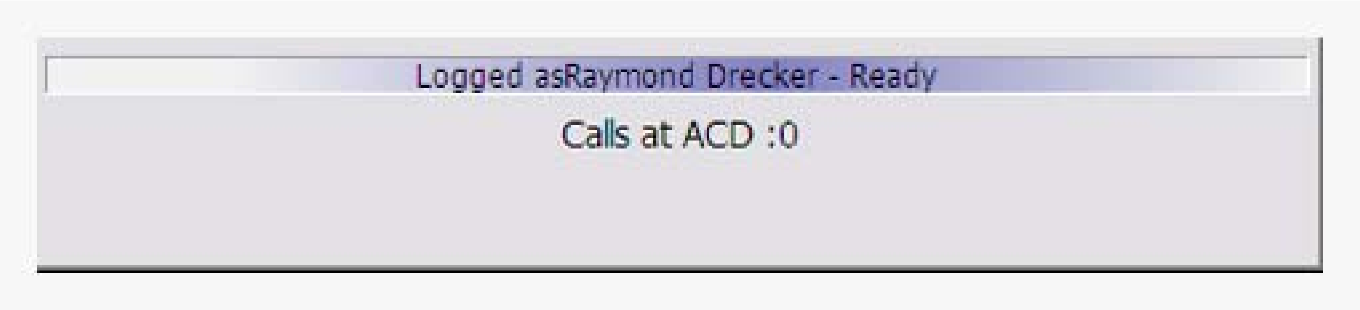


Interaction Tray

The interaction tray, located in the lower left quadrant of the Bar Agent application shows a list of all the interactions the agent has to do, this is a list of the pending interactions for the agent.

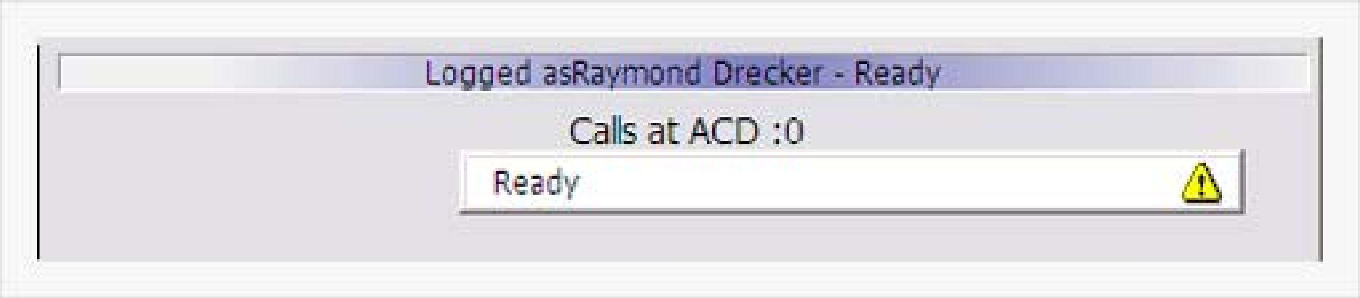
The list is a simple time oriented one, with the items sorted in order of occurrence.

Additional information tray



In the additional information tray, located in the bottom right quadrant of the Bar Agent application, there's information about the login status of the agent and the number of ACD calls that need answering.

In this tray there's also information on particular situations by adding a "Warning" sign inside a small prompt that indicates an abandoned call, an indication that the total interaction time has been reached, etc.



This tray shows a small and easy to glimpse summary of the overall status of the agent at one given moment.

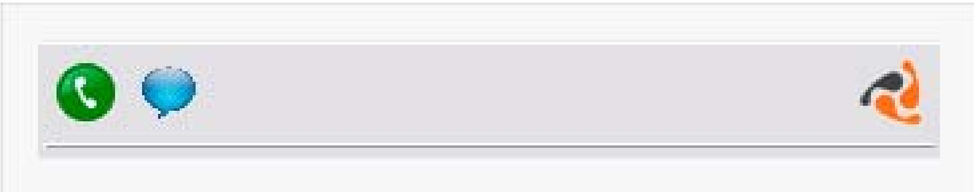
Interactions

The different interactions an agent can make have unique characteristics, and need to be assessed one by one. We have already assessed the possibilities to make a call, establish a chat session with another agent and take the first scheduled or ACD call.

We will now move on to the rest of the interactions an agent can perform with the Bar Agent application.

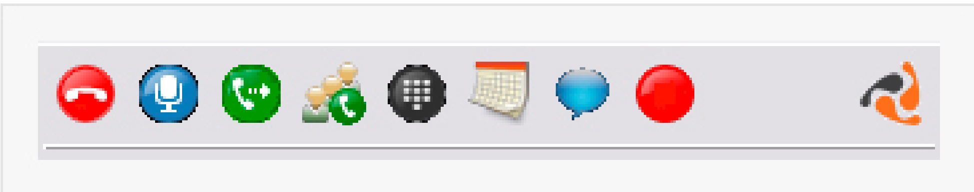
Answering calls

When a call enters the system and is assigned to an agent, the buttons bar will change, showing a different set of buttons than the one we see when we open the Bar Agent application (as can be seen on page 4.

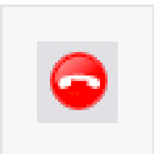


This is the first button change that occurs when an income call enters the system and is allocated to a particular agent. The “Make a call” button is replaced with a green button used to answer the call.

Once the agent clicks this new button the layout changes again to show an array of new functions associated to the answered call.

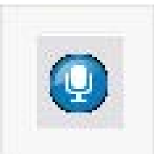


We will go through this buttons one by one.



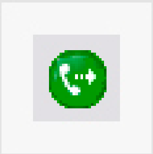
Hang up

This button will allow the agent to terminate the call and perform the required tasks in order to properly finish the interaction.



Hold

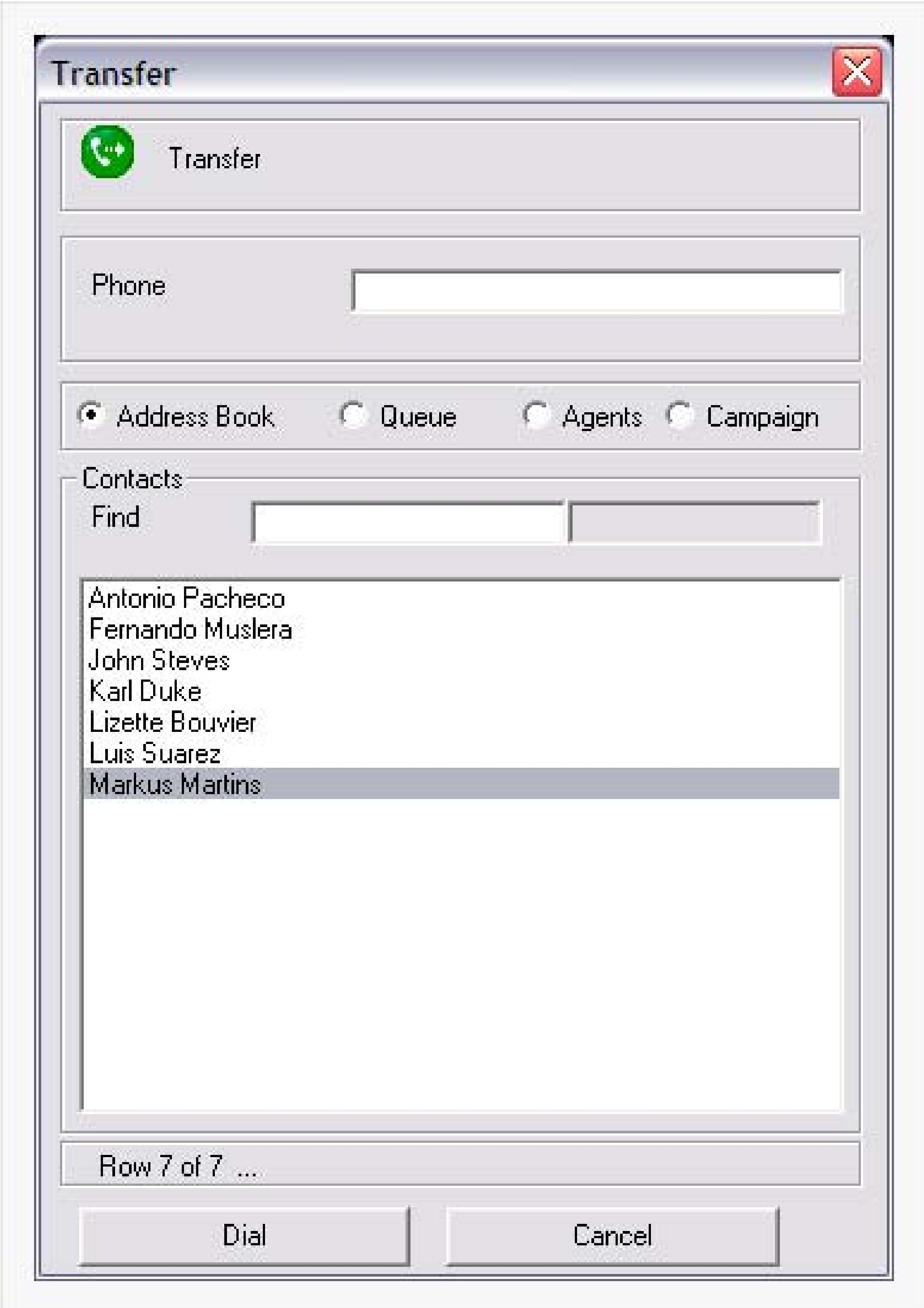
By clicking this button the agent can put the call on hold.



Transfer

This button allows the agent to transfer the call to another agent. Once clicked, the system will open a window in which the agent can select to whom he will transfer the call. The agent can transfer the call to someone else in the contact list, to another campaign and to another agents.

The call can also be transferred to a queue list of calls, immediately putting the client on hold.

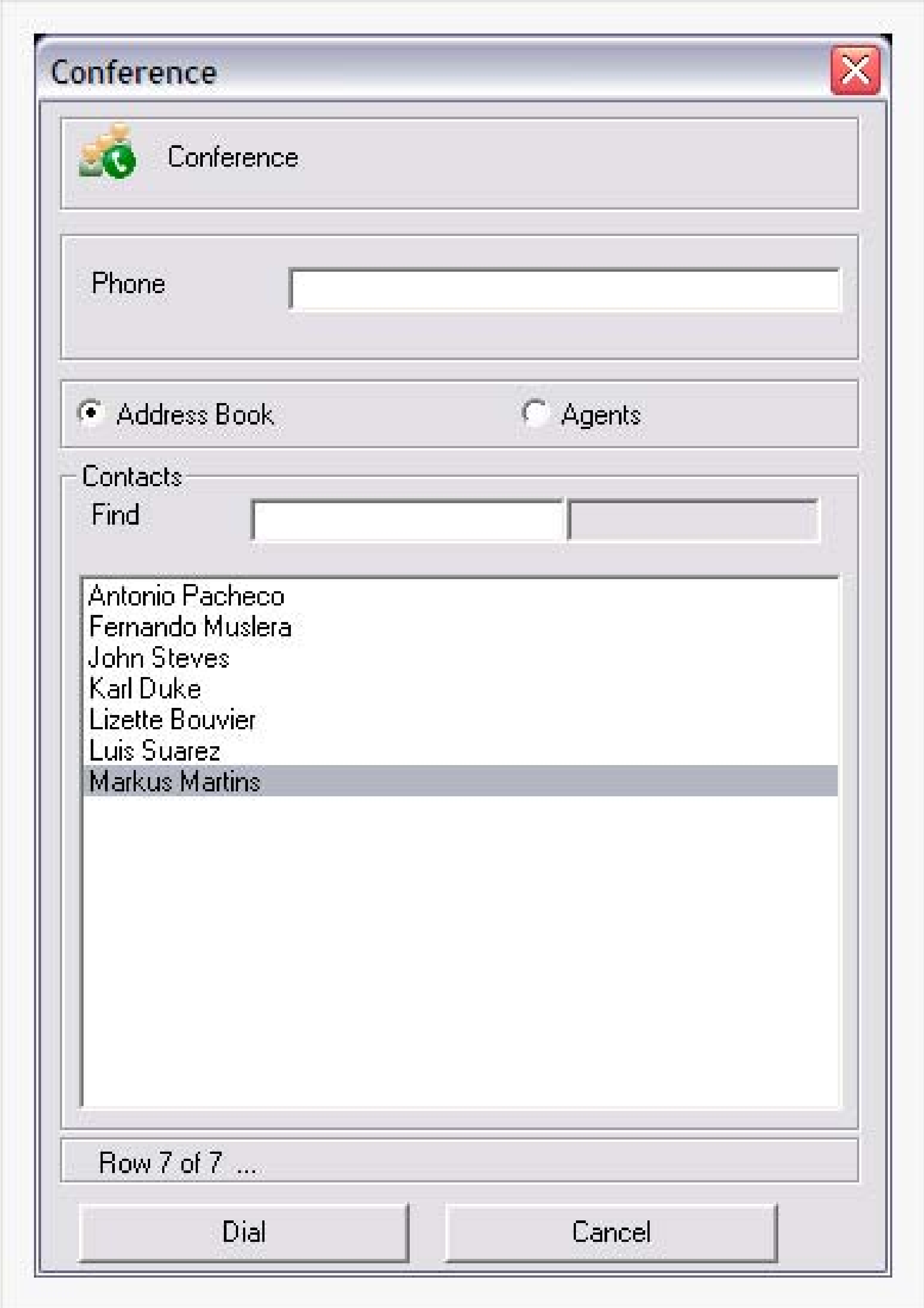


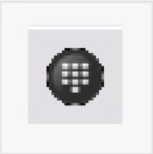
Conference Call

This button enables the agent to “invite” people to join the conversation, to put it in colloquial terms.

When the agent clicks on this button, a list of contacts appears on the screen so that they can be “added to the conversation”.

This is an important tool, since it gives the agent a chance to require the help of other colleagues to sort out particular situations in the case they invite other agents. The agent can also add any contact in the contact list to the call.

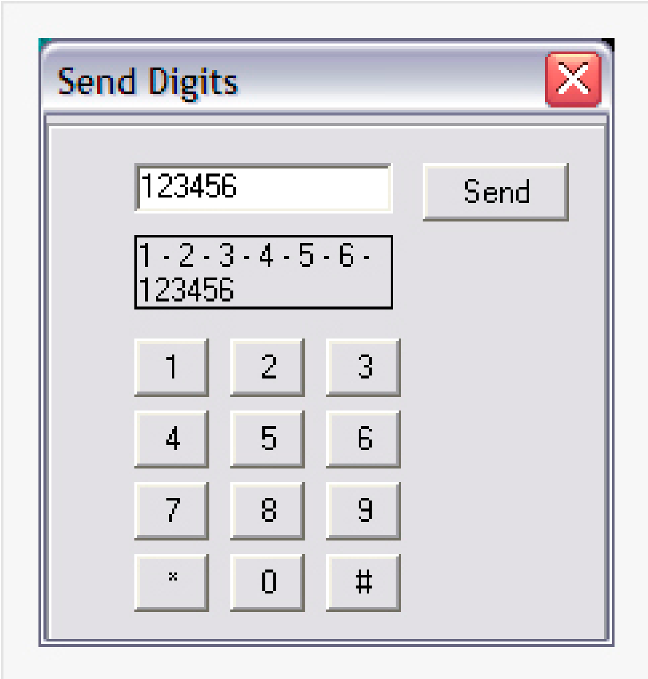

Conference
Conference
Phone
Address Book
Agents
Contacts
Find
Antonio Pacheco
Fernando Muslera
John Steves
Karl Duke
Lizette Bouvier
Luis Suarez
Markus Martins
Row 7 of 7 ...
Dial
Cancel



Send Digits

This button allows the agent to send a set of digits. Typically, in cases when the agent needs to send numbers for verification, this is the tool he will use.

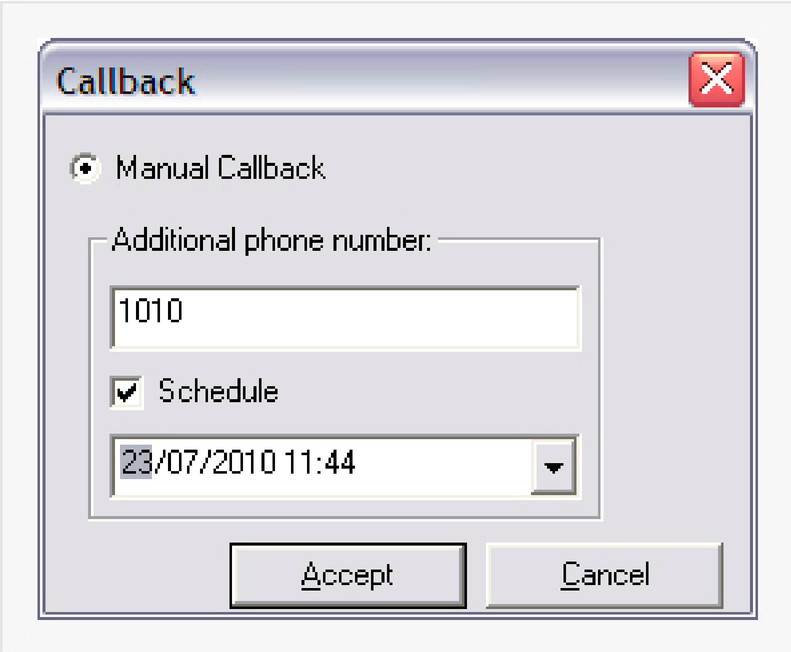
Once clicked, the agent will be prompted with a small window in which he will be able to either click on the digit he wants to send, or type them in the dialog box with the keyboard.

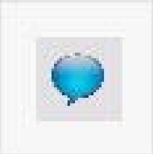


Schedule Callback

This button allows the agent to schedule a call for the client.

Once clicked, the system will prompt the agent to choose the date and time of the call he will have to make.

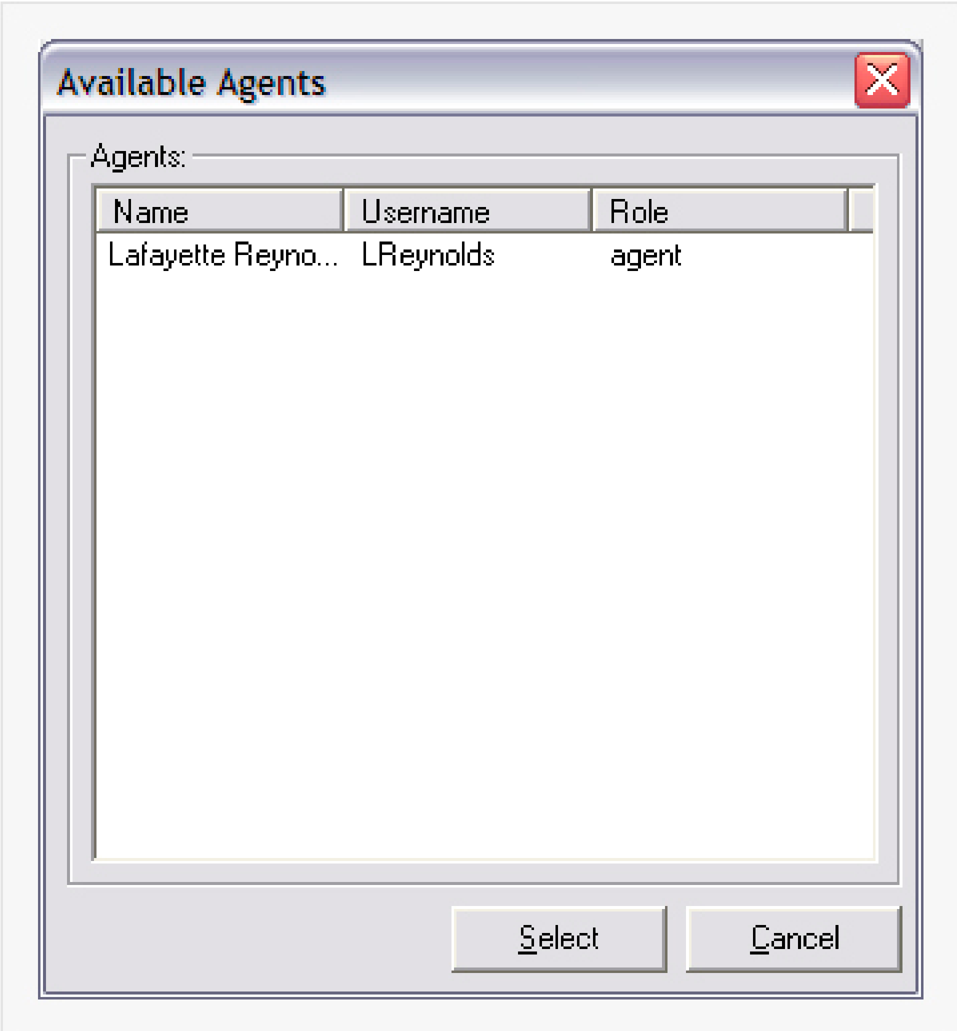


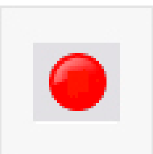


Make Chat

This button enables the agent to open a chat session with another agent. Once clicked, the system will prompt the agent to choose from a list of other agents which one will be the recipient of his chat messages.

This tool is useful for agents who need to consult another agent during the time they are answering a call. In order to be operational, this function needs special authorization from the administrator, who needs to check “Allow chat between agents” while configuring the campaign.



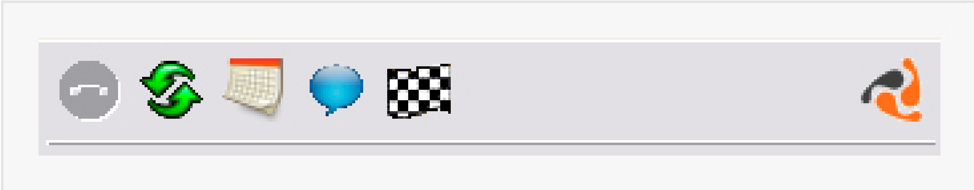


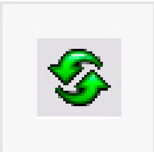
Record

This button enables the agent to record the audio of the call, in order to keep proof of what is being said. For example, this is useful when a client needs to give consent for some action, like upgrading an account, etc. In this case, the recording acts like a written signature.

After the button is pressed, the agent can stop the recording at any time by clicking on it again.

Once the call has been ended, either because the agent hung up or because the client did, the buttons on the button bar change once more giving the agent a different set of actions to perform after the call.





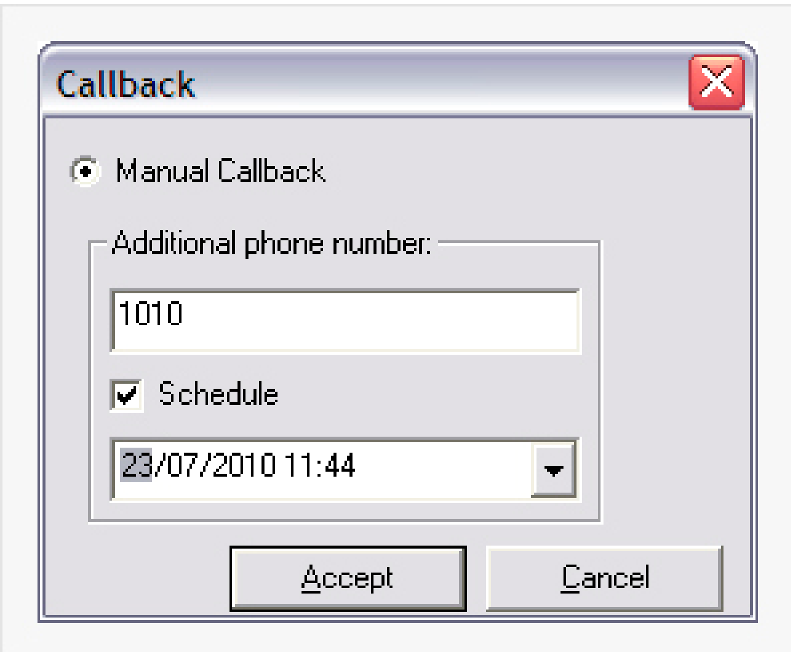
Call Back –Redial

This button enables the agent to contact the caller once again by calling him back. In order to actually be able to call the client, the campaign needs to be configured for outbound calls and allowed callback.

Schedule Callback

This button allows the agent to schedule a call for the client.

Once clicked, the system will prompt the agent to choose the date and time of the call he will have to make.

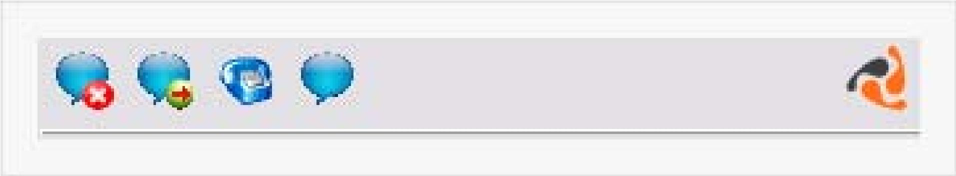


Wrap Up

This button is the button the agent has to press after he has finished all the actions necessary for the proper completion of the call. If for example the agent needs to check new data in a database for each call, he will have to click on this button after he has done so.

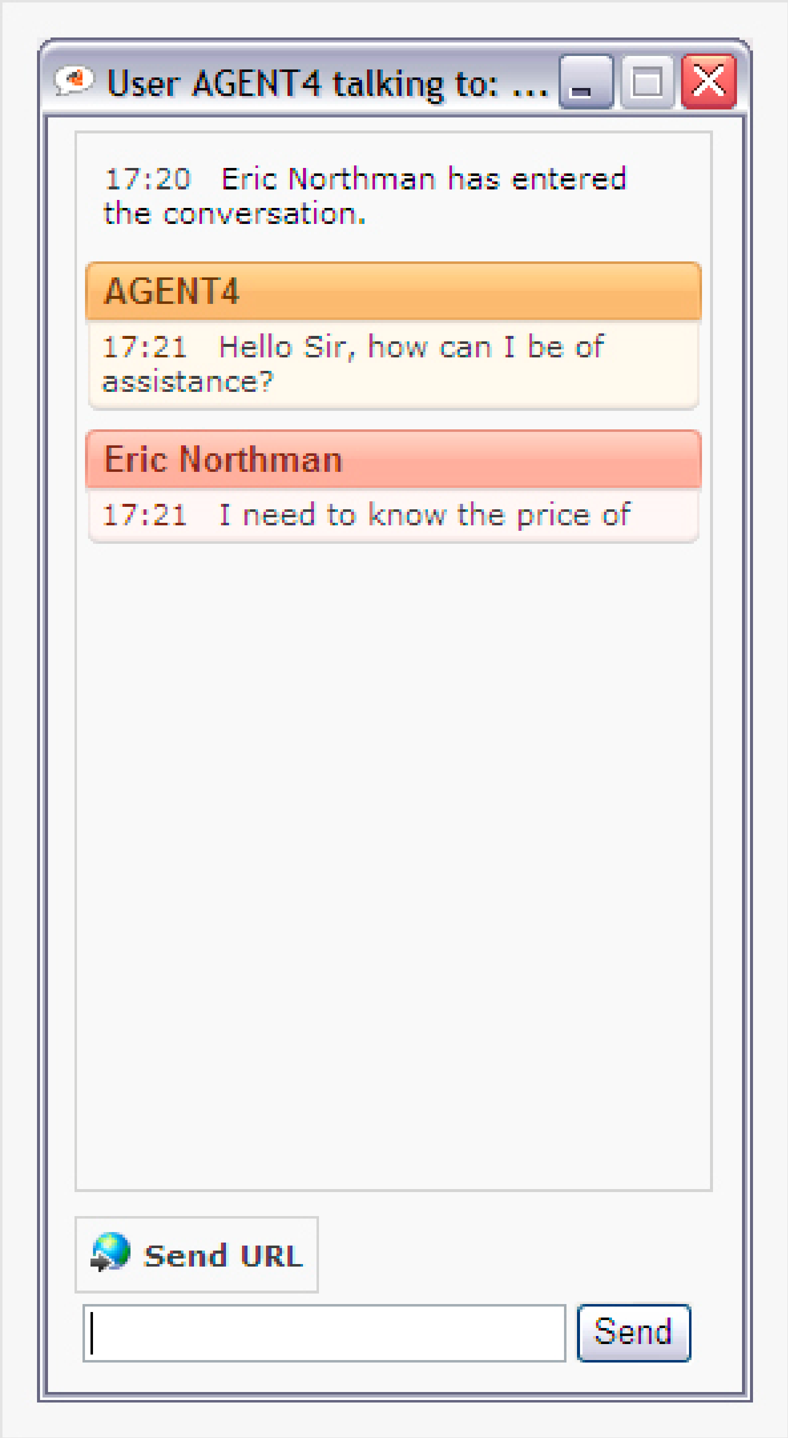
Clicking on this button allows the agent to receive new calls.

Chat



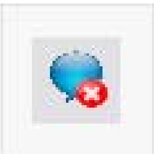
When an agent receives a chat interaction, the buttons in the button bar change to suit the needs of the chat interaction.

Unlike the other interactions we've seen so far, the chat interaction opens a window for a chat session with the client.



The send URL option, allows the agent to type in or copy-paste an internet address.

The chat window is rather simple in its workings. The agent can type the words he needs to communicate to the client and by pressing "Enter" the message is delivered to the client.



Stop Chat

This button stops the chat session, and allows the agent to finish the processes needed to complete the interaction.

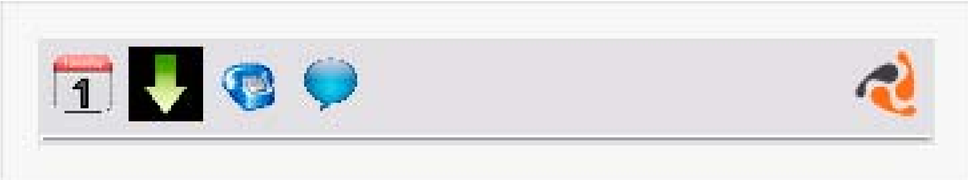
Transfer Chat

This button enables the agent to transfer the chat session to another available agent.

For information on the Chat and WrapUp buttons, please see pages 30 and 33.

Mails

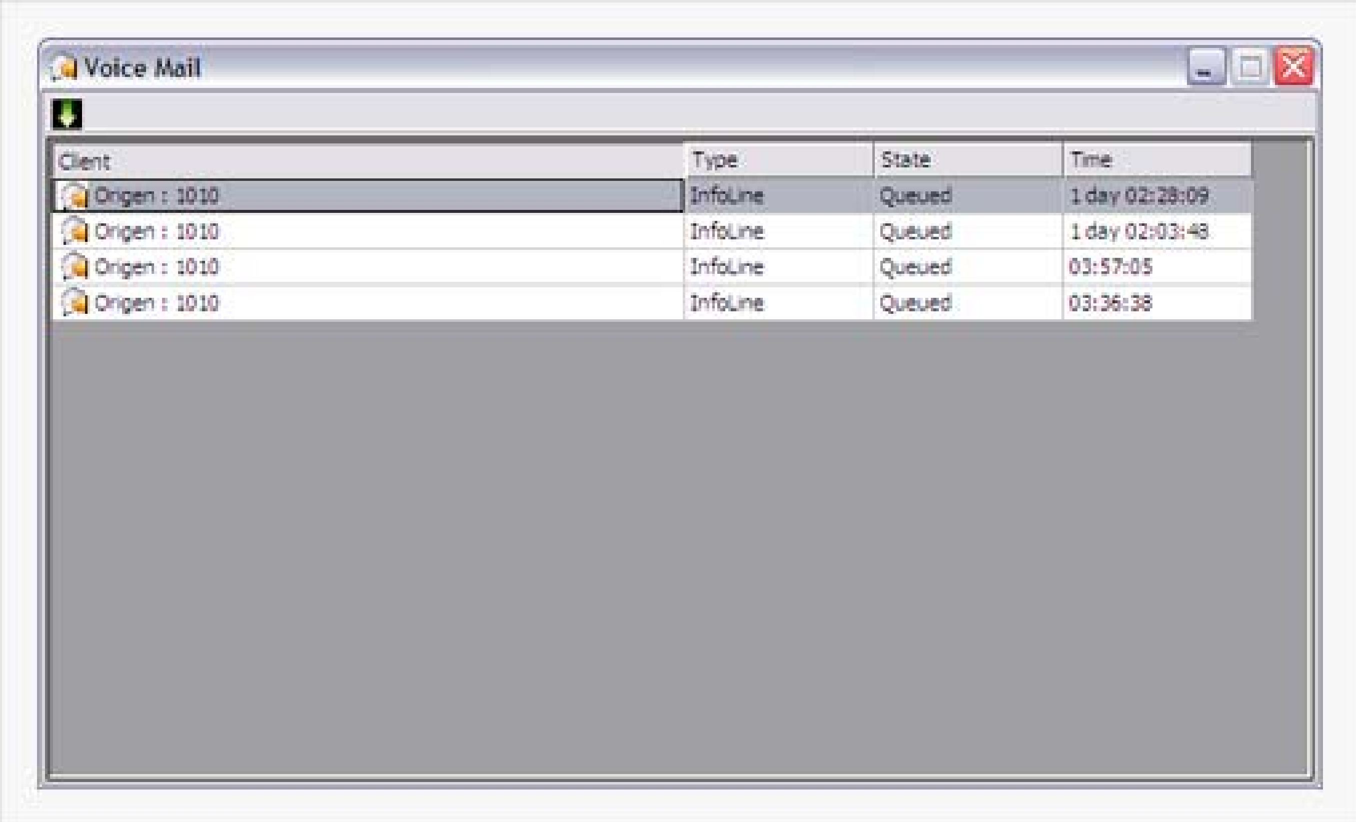
When the agent receives a mail interaction, the “Take” button appears again in the buttons bar, flashing.



By clicking on that button, the system will open the predetermined e-mail client for that computer, thereby opening the message and allowing the agent to answer it, store it, etc.

For information on the Chat and WrapUp buttons, please see pages 30 and 33.

Voicemails



This is the window that opens when the agent clicks on the “Voicemail” button in the Interactions Information Bar.

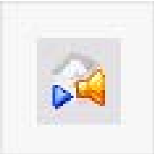
When the agent selects a voicemail from the list, the Buttons Bar displays a new button with a green arrow pointing down. This button takes the voice mail and starts playing it on the agent’s computer.

Once the agent clicks on the “Take” button, another set of buttons is displayed in the Buttons Bar.

Once again we will go over the interaction button by button.

Stop Voicemail

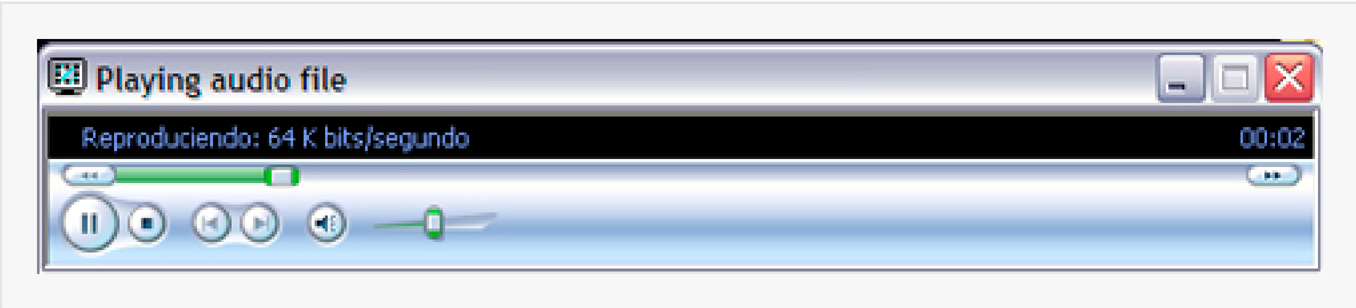
This button stops the voicemail interaction, and allows the agent to finish it.



Play Voicemail

This button plays the voicemail from the beginning every time it's clicked.

It opens the file on a media player, so that the agent can listen to it, pause it, etc.



Transfer Voicemail

This button enables the agent to transfer the voicemail to another agent, by opening a list of all the available agents at any given time.

For information on the Chat and WrapUp buttons, please see pages 30 and 33.

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