Agent

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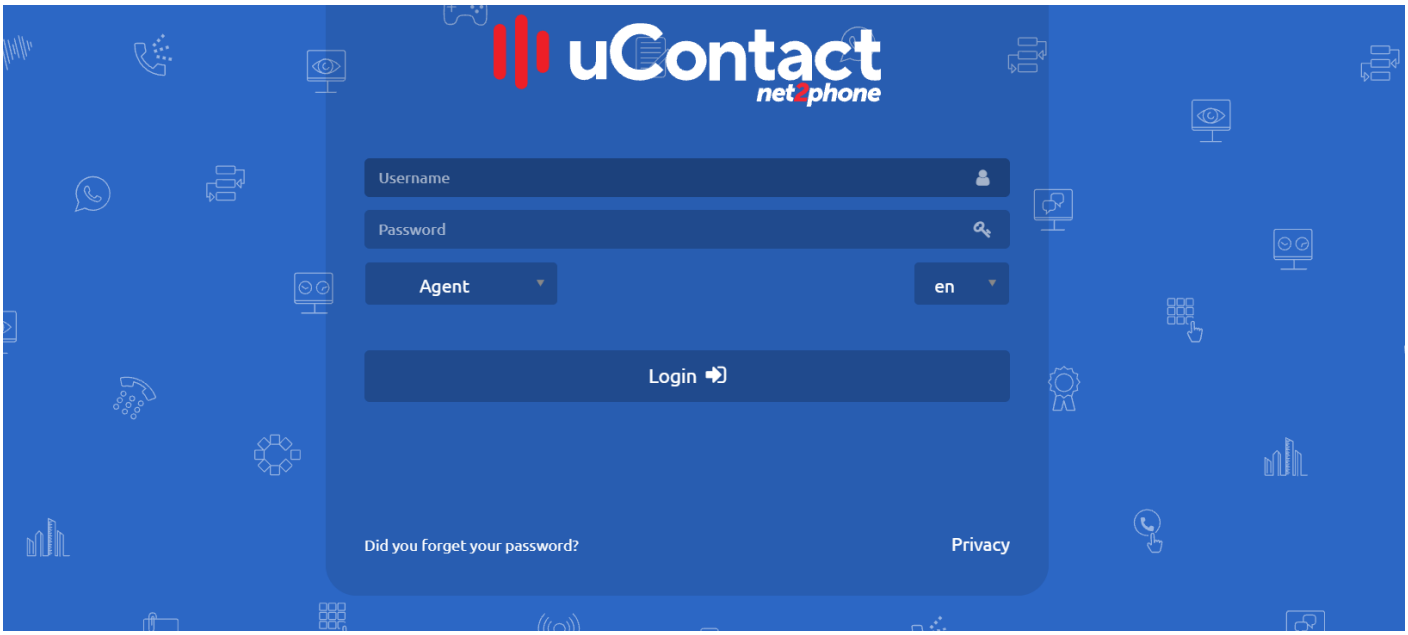
Introduction

> uContact Agent is a module for the call centre agent as the total solution for integration with features relating to data capture, monitoring by states and integrated communications with the uContact platform.

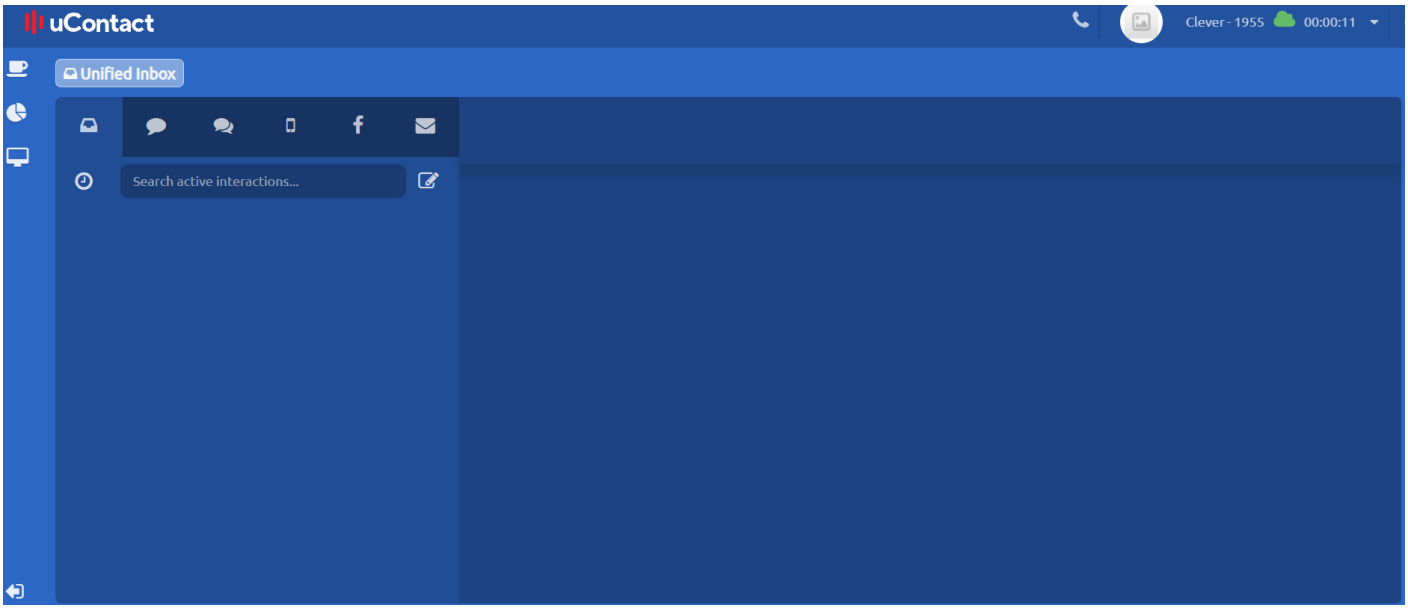
Login

uContact Agent has a security control module to identify agents with a created profile allowing to have a strict control of the campaigns of each of the call centre agents.

uContact Agent login is the main page that lets you select the language and role (Agent in this case) in which the user will work and validate his credentials, entering the URL : https://IPSERVER



Once inside the agent portal we will find the following screen:



Inside the portal we can see the varied actions of the agent.

Telephone

Contacts

Allows to see every contact in the system, separated by online and offline users. A more specific contact search can be made by writing its username on the Search area.

Interactions

The user can interact with the contact on many ways, such as start a call, add to the favourite section and transfer an attended or blind call.

The chat allows the exchange of messages with other agents, mainly used to report actions or events among users when they are talking.

To initiate a chat, the agent selects from his phone the agent with whom you want to chat. Selecting the icon of chat on the contact, the conversation will open and there the agent can see the history of chats, send a receive messages.



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When a new event reaches the agent, a beep sound will be heard and a notification with the name of the agent and his profile photo will be seen.

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The chat also includes a feature that allows you to send a message to all active agents by broadcast.

The chat is located in the tab **Unified Inbox,** which contains other communication channels.

Group Chat

In addition to an agent-to-agent chat, there is also the possibility of group chat with members of the same campaign. This function can be accessed by selecting the desired campaign from the "contacts" section on the softphone



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Broadcast

Agents can send a general message to EVERY online user in the portal. Just write the message on the Broadcast area and press enter to deliver it.

History

Allows to see the call log of the current session of the agent, if the call was incoming or outgoing, the called phone and the talked time.

Also, if a call was not answered or was rejected is indicated with a red colour.

> When clicking on the phone number, it redirects itself leaving ready to dial.



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Phone

Allows interaction making external calls. Among the features that will be allowed is the selection of the campaign which will call (in case you have more than one assigned outbound campaign).

Moreover you can initiate a call (green button) cut a call (button red), indicate the number to call (text box) or by typing the phone number buttons to which you wish to call.

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Other functionalities

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- **Hold:** Holds the call.
- **Conference:** To start a conference follow the next steps.
  - If the agent is on an active call:
    - 1. Press the conference button
    - 2. The person at the other end of the phone will be transferred to the conference Room created and will be waiting for the speaker to arrive
    - 3. The speaker can add more people to the conference Room by calling them. This can be done as many times as wanted
    - 4. For the speaker to get in the conference Room, just click on the conference button and the conference will start.
  - If the agent is not on an active call:
    - 1. Press the conference button
    - 2. A conference Room will be created
    - 3. the speaker, who started the conference, can add more poeple by calling them. This can be done as many times as wanted
    - 4. For the speaker to get in the conference Room, just click on the conference button and the conference will start.
- **Mute**: Put the Agent microphone in mute.
- **Video:** Allow the video in the call, having the chance to video call a client.
- **Attended Transfer:** When the call is Attended transferred, the one who transfers the call gets in contact with the person that wants to be transferred to and if he accepts the call is transferred.
- **Blind Transfer:** When the call is Blind transferred, the call is transferred directly to the number dialed.

Transfer Window

- **Agents:** Transfer to agent belonging to a user campaign.
- **Campaigns:** Transfer to an inbound campaign owned by the agent

- **External number:** Transfer to a number outside of uContact.

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Favourites

List of agents added to favourite.

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Park

When the agent has an active call and presses Parking, the receiver will be put on hold and the agent will be without an active call to make others. When you want to return to the call, press the green phone button. Another way to return to the call is to dial the list number, which is displayed to the right of the number, in the case of the previous example would be 701.

SMS

Allows sending text messages to cell phones, indicating the number to which you want to send, the campaign and the text to send.

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Name and number of the contact must be detailed. To finish the process click on the green button.

Show phone

It's possible to show the tab on the right side by clicking the expand button which is located in the upper right corner or using the display button located in the right side of the screen.



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Calls

Calls notification

When the agent has an incoming call, he will be notified with a sound alert as well as a pop up outside the browser, or at the deploy button on the top right corner as shown in the picture.

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Talking calls

On an incoming call, at the left margin an icon appears that the agent can use to take the call.

The call can also be taken by clicking the pop up as well as deploying the right margin and using the phone.

> The call can be rejected by clicking on the cross to close the notification or using the hang up button of the phone.

The system also has AutoAnswer if this is defined to automatically answer the call beep sound will be heard by the Agent to know that you have a call in progress.

Once the call was attended, on the top side of the screen a timer will appear, showing the time that passed with the call being active.

Unanswered calls

In case that the agent does not take the call , it will be referred to the next available agent.

The system also has AutoAnswer. If it is defined, when taking a call, a beep sound can be heard by the agent to know that he has a call in progress.

> The time that the agent has to answer the call is set to the campaign in which the agent is.

Ending calls

To end a call, the agent can click on the Cut button located on the left margin or from the agent's phone.

When a call ended by part of the agents or by client we will listen a double beep that indicates us that the call is finished.

Wrap-Up

> The Wrap-Up is a time interval in which the agent can not receive any calls.

When the call ends, the agent will be on the Wrap-Up state. This is to have a controlled time to end the appropriate management.

The time can be seen in the top right of the screen as shown in the image.

> Wrap-Up time is set to the campaign in which the agent is.

Unified Inbox

> The agent will have all the interactions here.

The agent will look like the following interactions here

Each interaction will look like the following, having its channel icon and its details.



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Interactions can be filtered by channel selecting its icon.

Transfer Interaction
The Agent may transfer the interaction to other agents or to other campaigns

- Pressing on Transfer will display a list of agents from the same campaign, arranged alphabetically, online and offline.
- Below will be listed all the campaigns to which the interaction can be transferred, including those that have bots.

Pin Interaction
By clicking on the pin, the agent will be able to maintain interactions at the top of the inbox.

Close Interaction
The Agent may end the interaction.

- If the campaign to which the interaction belongs has classifications, when closing it, the classifications modal will be displaye

Search for interactions

Through this button the agent can access the search for interactions.

To access them, it must be fulfilled that: They belong to an active campaign, the agent must be the one who attended the interaction, it must be finalized and **be in a range of one month**.

By default, all completed interactions will be brought.

> Currently you can search for interactions belonging to **Email and SMS** campaigns

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In the upper section we will find the Interaction Finder, it will look for matches in the destination mail box or the mails subject.

The same for SMS, the system will search for matches of destination numbers.

:lupa: To perform the search, the user can press the Enter key or click on the magnifying glass icon.

:Cruz: It allows to close the search engine of interactions and return to the unified inbox.

:FlechaAbajo: Allows you to change between Emails search SMS search or Messenger search (By default Emails). pressing it will display a modal like the following:

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:CambioPagina: Allows you to search between results if you have more than 10 interactions that match the search criteria.

> **It should be noted that when you close the modal and open it again the system will show us the last search made with the current session.**

>

> The search for interactions will have a configuration option that will allow or not see interactions of other agents



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