

CALL CENTER AGENT

# CCA APPLICATION GUIDE



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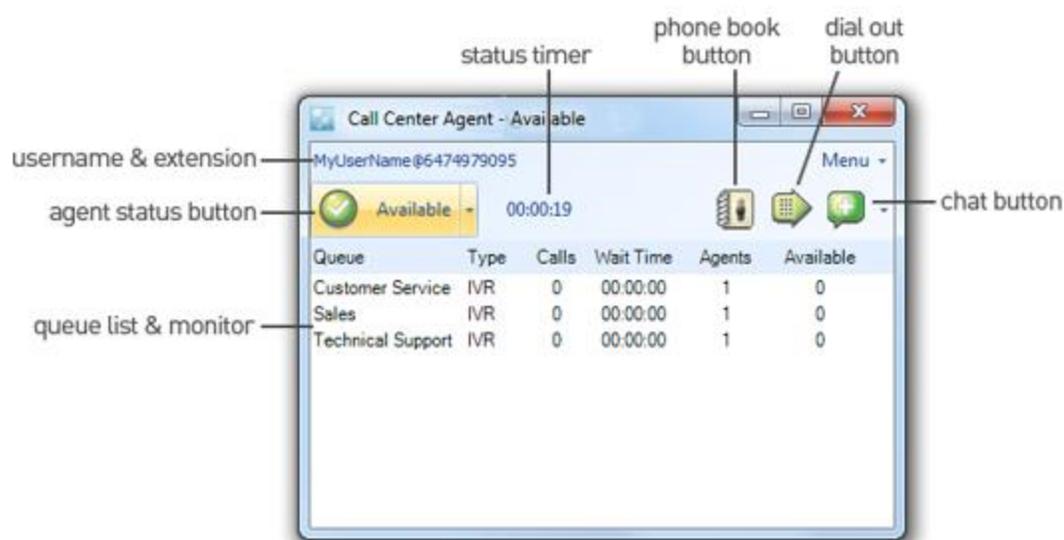
## CALL CENTER AGENT

# CCA APPLICATION GUIDE

This document describes how to use the Call Center Agent v10.3

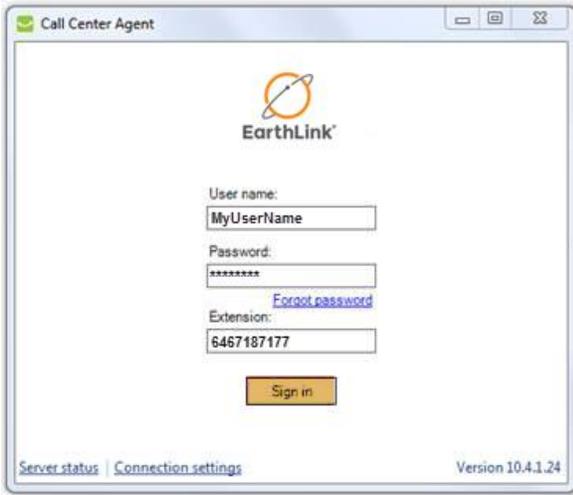
**Bold type** represents screen names and items within the administrator portal.

## BUTTONS DISPLAY



## 1. OPEN THE CALL CENTER AGENT

Start by double-clicking the **Call Center Agent** shortcut on your desktop or by navigating to **Start Menu > All Programs > Virtual Call Center** and launch the CCA from there.



A sign in window will open asking for three items, your **Username**, **Password**, and **Extension**. Your username and password should be provided to you before your first login, only your password is case sensitive.

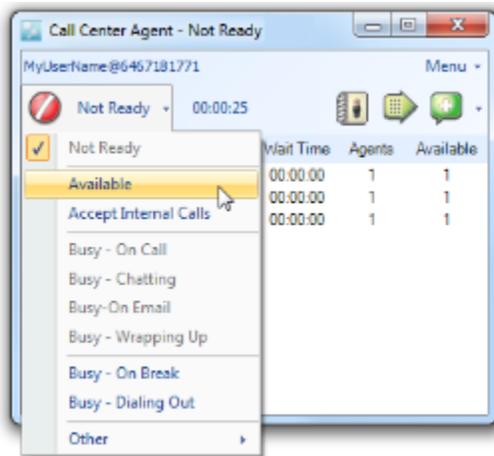
In the **Extension** field, simply enter the **phone number** where you wish to receive calls. You can enter any 10 digit phone number that is available to you, even a cellular phone or softphone – do not use any hyphens, letters, or special characters. Once you have entered all three fields, click **Sign in**.

**Note:** If you are unable to connect, please see [Connection Settings](#).

## 2. SWITCH YOUR AGENT STATUS TO AVAILABLE

When the application opens, the **display** window will list the **queue(s)** you are qualified to handle as well as the **number of calls** waiting in each queue. Your agent status will begin as **Not Ready**.

In order to receive calls in queue(s), you must change your agent status to **Available**. To do this you can either click the **agent status** button once, **or use the drop down menu and select Available**.

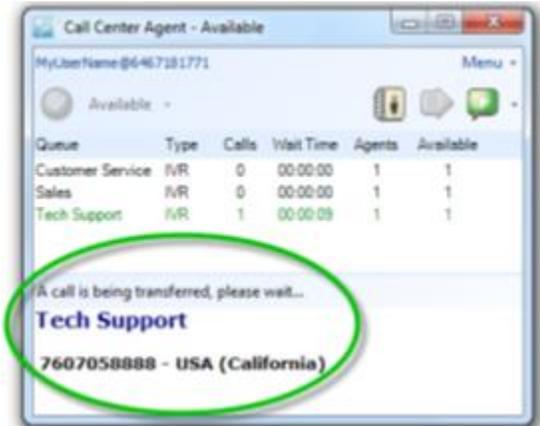


**Note:** **Available** is the only **agent status** which can receive calls in queue.

**Note:** Clicking the **agent status** button will always switch your status to **Available**. If already set to available, it will switch your agent status to **Busy – On Break**.

## 3. ACCEPT A CALL

Now that your **agent status** is set to **Available**, a call in queue may be delivered to you at the extension you signed in with. When this happens the CCA will come into focus to let you know you're receiving a call. The display will show the **queue name** as well as the **caller ID** if available.



Accept the call by answering your phone; at this point the CCA will automatically adjust your **agent status** to **Busy – On Call**. Similarly when your call is over, hang up your phone and the CCA will automatically change your status to **Busy – Wrapping Up**, see [Wrapping Up](#).

**Note:** If you do not answer your phone in time, your **agent status** will automatically change to **Not Ready** and you will receive the following message: Operation timed out (ring no-answer). The call is not lost, it will be sent back into the queue for the next available agent.

## 4. WRAPPING UP

After a call ends or is transferred, the CCA will automatically switch your agent status to **Busy – Wrapping Up**. This **wrap-up mode** provides the time to complete any paperwork or additional tasks.



If **Call Classification** is mandatory, the **Classification** window will open when a call has ended, *please see [step 5](#) below*.

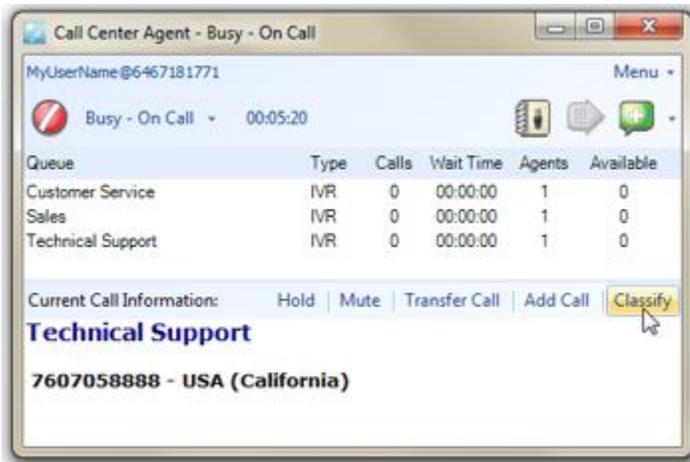
To take another call, change your **agent status** to **Available** as indicated in [Switch Your Agent Status to Available](#).

**Note:** Your team may have a limited wrap-up time. When that time expires, the CCA will automatically change your **agent status** back to **Available**.

## 5. CALL CLASSIFICATION \*\*UPDATED

**Call classification** is a feature that helps to determine what types of calls your team is getting and what actions your staff are taking to resolve those calls. It is configured by your team's administrator and may be disabled, optional, or mandatory for your team.

You may open the **Classification** window at any time during a call by clicking the **Classify button** located on the middle bar.



# WRAPPING UP



If **Call Classification** is mandatory, the **Classification** window will open automatically after an event or call ends and **wrap-up** mode begins.

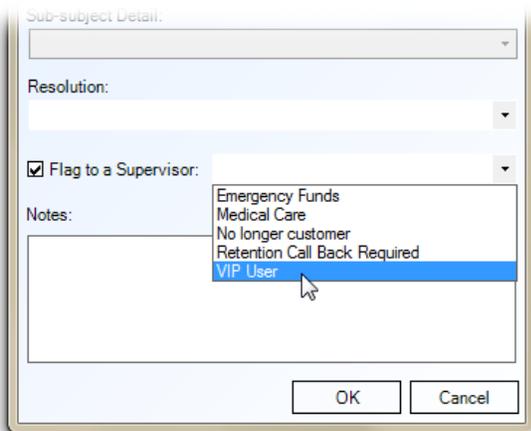
A screenshot of the "Call Classification" dialog box. The window has a title bar with "Call Classification" and a close button. The form contains several fields: "Caller Type" (dropdown menu with "New Customer" selected), "Claim No." (text box with "1234"), "Account No." (text box with "567"), "Provider No." (text box with "890"), "Main Subject" (dropdown menu with "New Account" selected), "Sub-subject" (dropdown menu with "Residential" selected), "Sub-subject Detail" (disabled dropdown menu), "Resolution" (dropdown menu with "New Sale" selected), "Flag to a Supervisor" (checkbox checked, dropdown menu with "VIP User" selected), and "Notes" (text area with "Interested in many of our services"). At the bottom are "OK" and "Cancel" buttons.

Use the drop down menus to select the appropriate options for **Caller Type**, **Main Subject**, **Sub-subject**, **Sub-subject Detail** and **Resolution** fields. If a field is not applicable, it will be disabled and faded out.

**Claim No.**, **Account No.**, and **Provider No.** fields can be used for tracking customer account information. If these fields are enabled, please consult your team's administrator to ensure correct entry. The **notes** field can be used to enter additional information, when complete click **OK**.

## 6. FLAG TO A SUPERVISOR (OPTIONAL)

If the **flagging** feature is enabled, you can alert your supervisor of the call or event that you've just handled by placing a checkmark in the box labeled **Flag to a Supervisor** and select the **reason for flagging** from the drop down list on the right. Caller and disposition information, along with any other notes, will be emailed directly to your assigned supervisor.



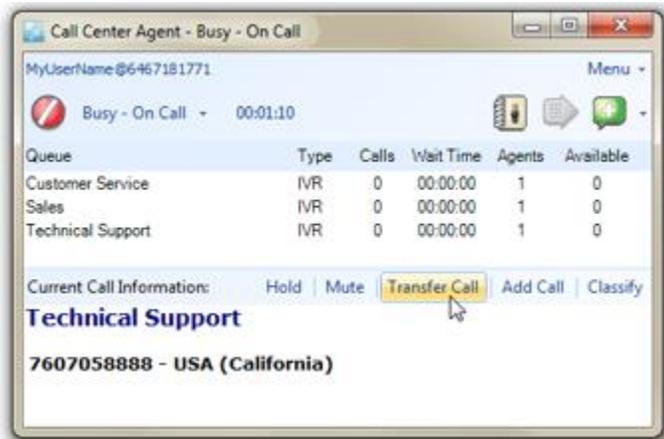
The screenshot shows a software window titled "Sub-subject Detail." It contains several fields: "Resolution:" with a dropdown arrow, "Flag to a Supervisor:" with a checked checkbox and a dropdown arrow, and "Notes:" with a text area. The dropdown menu for "Flag to a Supervisor:" is open, showing a list of reasons: "Emergency Funds", "Medical Care", "No longer customer", "Retention Call Back Required", and "VIP User". The "VIP User" option is highlighted in blue, and a mouse cursor is pointing at it. At the bottom of the window are "OK" and "Cancel" buttons.

**Note:** If a field is mandatory, you must select an option for that field or you will not be able to close the **Classification** window. If classifying is mandatory for each call, you will not be able to change your status back to available until call classification is complete.

## 7. TRANSFER A CALL

You may wish to transfer your currently active call to a different queue, to an outside line, or to a teammate.

Click the **Transfer Call** button located on the middle bar – the **transfer call** window will open.



To **transfer to a queue**, proceed to [step 7.1](#) below.

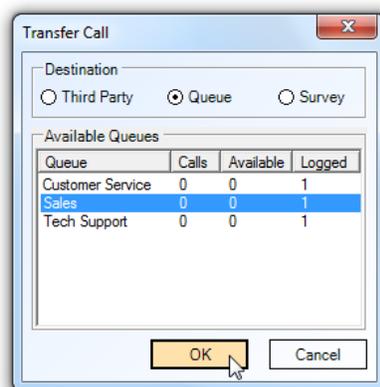
To **transfer to a phone number**, proceed to [step 7.2](#).

**Note:** To make an internal transfer, pull up a list of your teammates who are also signed in with the CCA by using the phone book. Please see step 9 [Phone Book](#).

### 7.1 TRANSFER TO A QUEUE

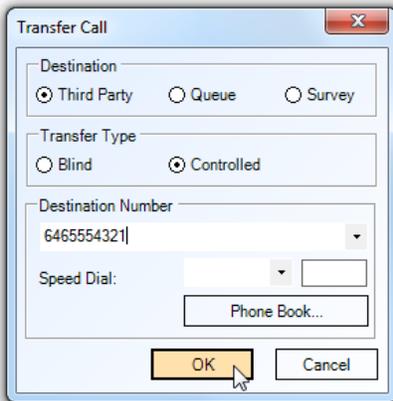
Change the **Destination to Queue**, select an **available queue** and click **OK**.

Your connection with the caller will end and your CCA will enter **wrap-up mode**.



## 7.2 TRANSFER TO A PHONE NUMBER (THIRD PARTY)

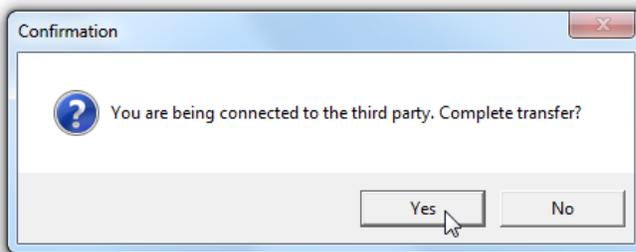
Change the **Destination to Third Party** and enter the phone number in the field labeled **Destination Number**. Alternatively you may use the drop down menu on the right to select a number that has been previously entered.



Now you must choose between two different transfer types:

**Blind:** Also known as a cold transfer – the outcome or success of the transfer will remain unknown. Once you click **OK**, the system will attempt to transfer your caller to the destination number entered, your connection will end and your CCA will enter wrap-up mode.

**Controlled:** Also known as a warm transfer – allows you the chance to first speak with the third party while your caller remains on hold. Once you click **OK** your caller will be put on hold, and you will hear your destination number ringing, a confirmation window will open.

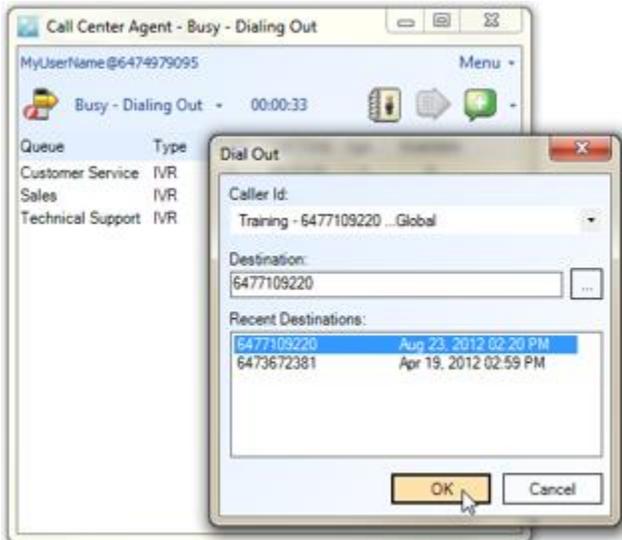


Only click **Yes** once you've spoken with the third party. At any point you may click **No** to cancel the transfer and resume your current connection on hold. After clicking **Yes**, your caller will be transferred to the third party, your connection will end, and your CCA will enter **wrap-up mode**.

**Note:** You can also transfer to a third party with the Phone Book. See [step 8](#).

## 8. DIALING OUT \*\*UPDATED

To place an outbound call, click **Dial Out**, located on the top row – the **Dial Out** window will open.



Select the **ID** you wish to display from the **Caller ID** dropdown menu.

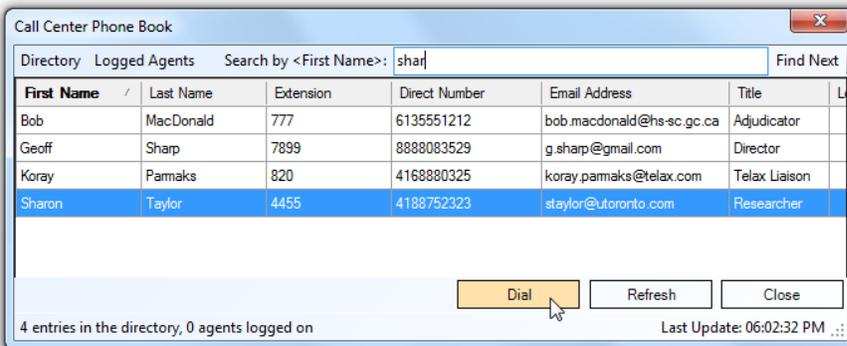
Now enter the **phone number** you wish to dial in the field labeled **Destination**. Alternatively you may select a **number** from the **Recent Destinations** list below. **Click OK**. The system will first call you at the extension that you signed in with, only once you answer your phone will your destination be dialed.

**Note:** If you have multiple **caller IDs** to choose from, the next time you dial out the CCA will automatically use the last ID selected. Please verify you've selected the correct **Caller ID** option.

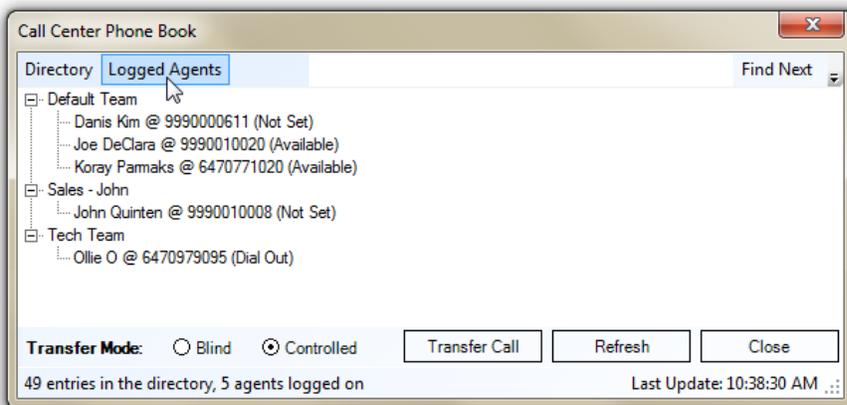
## 9. PHONE BOOK

The **phone book** is a real-time contact manager that makes dialing out and transferring simple. Click **Phone Book** located on the top bar and the **Phone Book** window will open. Use the buttons in the upper left corner to switch between its two listing modes:

**Directory:** populated by your team's administrator, each column can be sorted ascending and descending or used as a search field.



**Logged Agents:** a real-time listing of your teammates that are currently signed in with the CCA and their agent status (**on-call**, **on-break**, **available**).

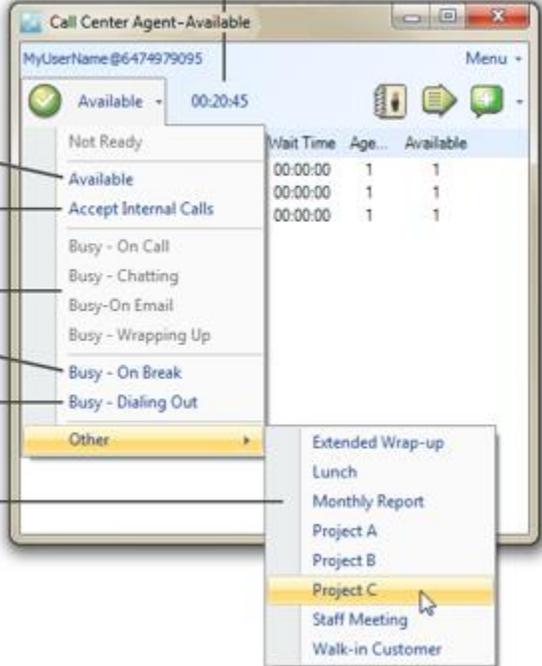


Select a **contact** or **teammate** from the appropriate list and then click **dial**. If you already have a call in progress, the phone book can be used to transfer rather than dial.

## 10. AGENT STATUS & BUSY REASONS

Your **agent status** is used to manage when you receive a call in queue. When you are not available to take a call or if you need to step away from your phone, be sure to select the appropriate option from the dropdown menu.

status timer



use when you are ready to take calls in queue

use to remain available for calls or transfers by other agents, but not to calls in queue

faded out options happen automatically

use when on break or away from the phone

same as using the Dial Out button

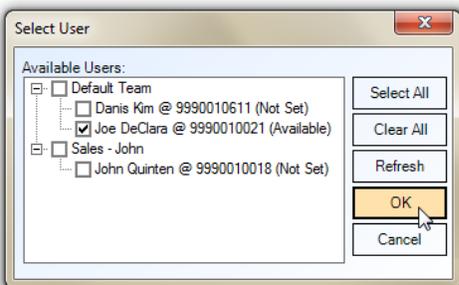
these options are set up by your team's administrator, use when appropriate

Wait Time	Age...	Available
00:00:00	1	1
00:00:00	1	1
00:00:00	1	1

Every time your agent status changes, the **status time** will reset to zero. This counter can be used to track time spent on different statuses and projects.

## 11. START A CHAT SESSION

Click on the **Chat button** located on the right side of the top bar. When the **Select User** window opens, place a checkmark next to the members you wish to add to your chat session and click **OK**.

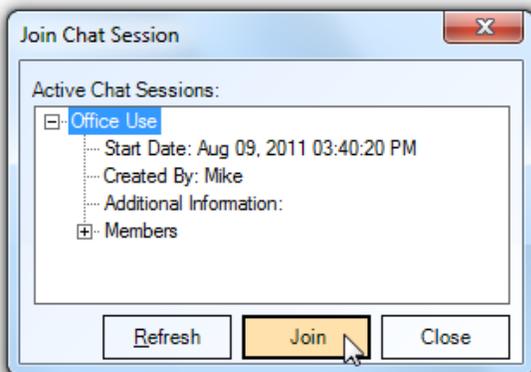


### 11.1 JOIN AN ACTIVE CHAT SESSION

To join an **active chat**, navigate the mouse to **Menu > Chat > Join Chat Session**.

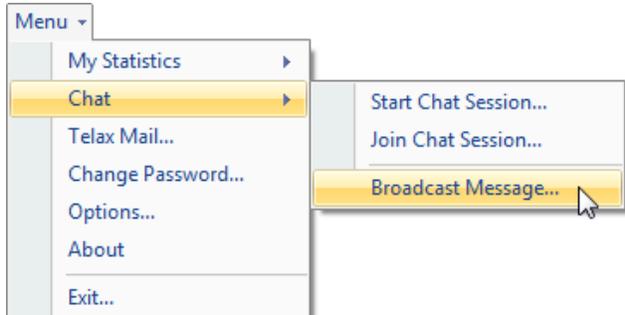
In the **Join Chat Session** window, the name of the **active chat sessions** will be displayed. Click on the name and click **Join**.

More information regarding chat sessions and their members can be displayed by clicking the **+** expansion buttons.



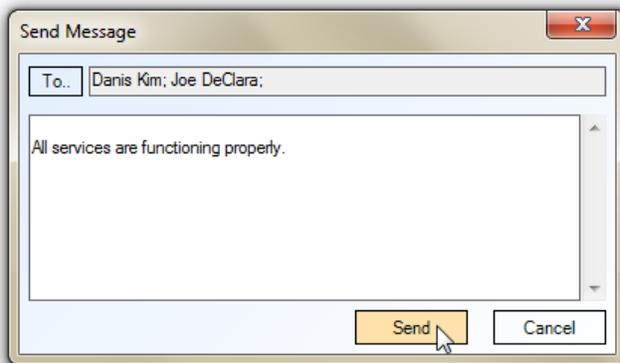
## 11.2 BROADCAST A MESSAGE

From the main application window, navigate the mouse to **Menu > Chat > Broadcast Message...**



The **Select User** window will open. Place checkmark next to the **team name** or **member names** you wish to broadcast your message and **click OK**.

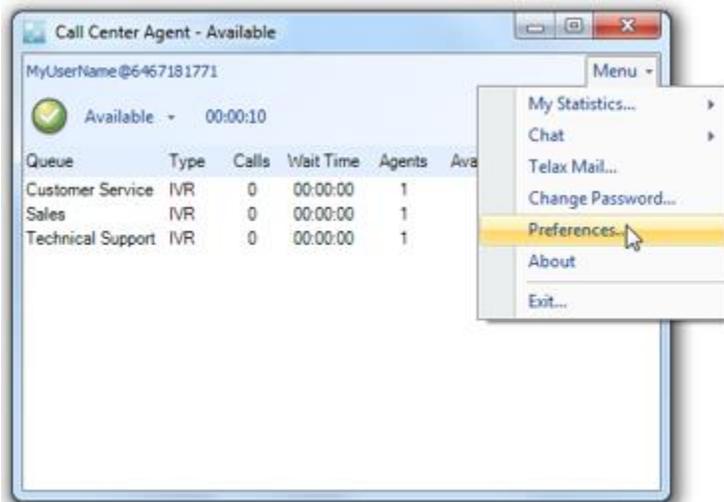
Write your message and then click **Send**.



## 12. CHANGE YOUR PASSWORD AND PREFERENCES

To **change your password**, navigate to **Menu > Change Password**.

To **change application preferences**, navigate to **Menu > Preferences...**



Some changeable settings include the **Font/Colors**, **Hotkeys**, and **Fade** feature.

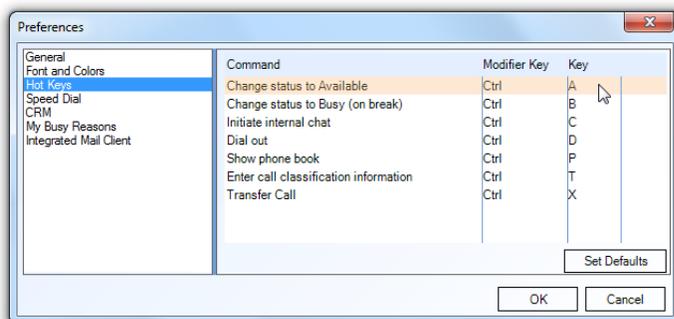
See step [12.1](#) and [12.2](#) below.

### 12.1 HOT KEYS

**Hotkeys** can be accessed by selecting the **Hot Keys** tab in the **Preferences** window.

Click the entry you wish to change and enter the key you wish to use for that command.

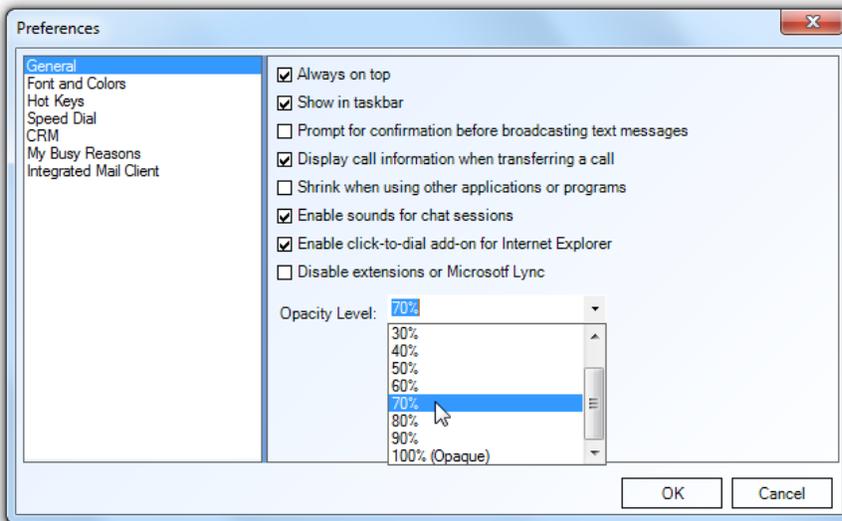
**Modifier key** drop down options are: **Ctrl**, **Alt**, **Shift**, and **None**. It is recommended that **Ctrl** remains as the **modifier** key.



## 12.2 USING THE FADE FEATURE

The application can remain on top of other windows in a transparent state. This may be useful to monitor the queue and caller information while using other applications on your computer.

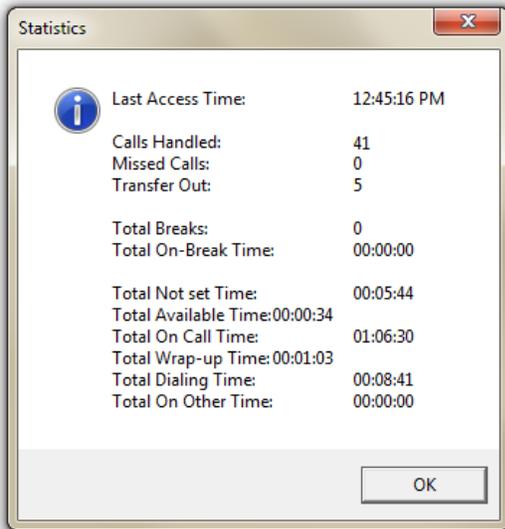
In the **General** tab, place a checkmark next to **Always on top**. Select the desired **transparency level** (10% being least visible) and click **OK**.



## 13. CALL STATISTICS & HISTORY

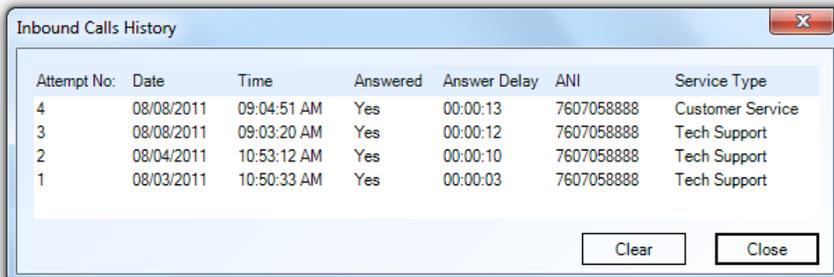
Navigate the mouse to **Menu > My Statistics**. You will see three options available:

**General...:** A list of call stats for your current day such as calls handled, missed, or transferred.



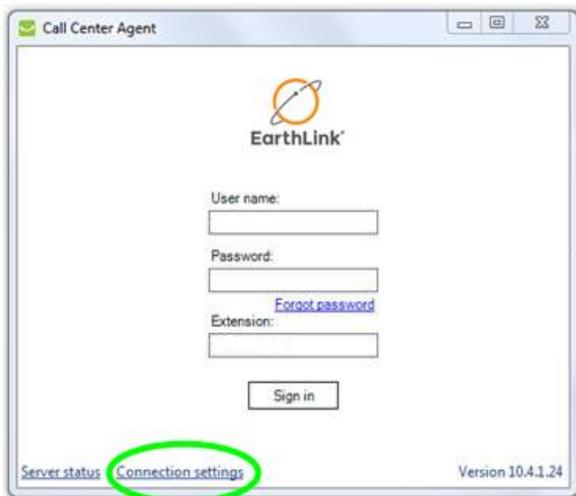
**Inbound Calls History:** A list of up to 50 of the most recent inbound calls.

**Outbound Calls History:** A list of up to 50 of the most recently dialed phone numbers.



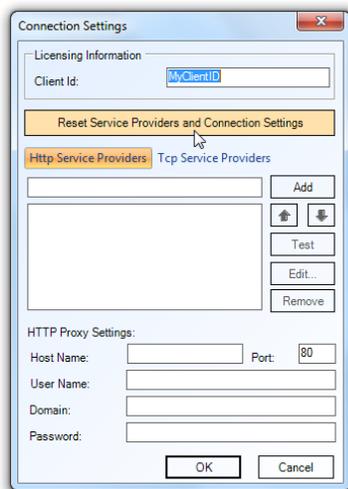
## 14. CONNECTION SETTINGS

If you are unable to sign in or connect with the CCA, click **Connection Settings**.



When the **Connection Settings** window opens, verify that you are using the correct **Client ID** in the **Licensing Information** box.

Also check to see if the **HTTP Service Providers** section is blank, in this event click **Reset Service Providers and Connection Settings**. This will automatically detect and populate the correct **Proxy settings**.



After clicking **Reset...**, confirm that there is at least one proxy entry populated in the **HTTP Service Providers** section.

# CONNECTION SETTINGS

A screenshot of a Windows-style dialog box titled "Connection Settings". The dialog has a blue title bar with a close button (X) in the top right corner. It contains several sections: "Licensing Information" with a "Client Id:" label and a text box containing "MyClientID"; a "Reset Service Providers and Connection Settings" button; two tabs, "Http Service Providers" (selected) and "Tcp Service Providers"; a list of six HTTP proxy URLs with associated "Add", "Test", "Edit...", and "Remove" buttons; and "HTTP Proxy Settings" with fields for "Host Name", "Port" (set to 80), "User Name", "Domain", and "Password". At the bottom are "OK" and "Cancel" buttons. A mouse cursor is pointing at the "OK" button.

Now click **OK** and try to log on once more as you did in "[Open the Call Center Agent](#)".

**Note:** A **proxy setting** entry can be added manually by clicking **Add**.

If you are still unable to connect, please consult your supervisor / local system administrator.

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