

Call Centre Agent Guide

Version: 1.0 Revision Date: Sept 01, 2009



ONECONNECT Call Centre Agent Guide

This document describes how to use the OneConnect Call Centre Agent.

The procedure will run through the basic steps involved in receiving, transferring, and ending an inbound call. Other features such as Hotkeys, Chat Sessions, and using the Phonebook are outlined in the Appendix of this document. *Italic type* represents an item within the application, while **bold type** represents a match to the screenshot component provided with each step in the procedure.

Document Name:
OneConnect Call Centre
Agent Guide

Category:
Procedure / Training

Document Division:
IT Department

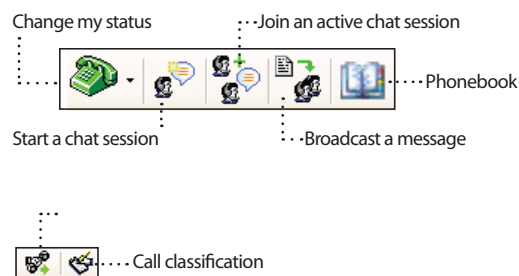
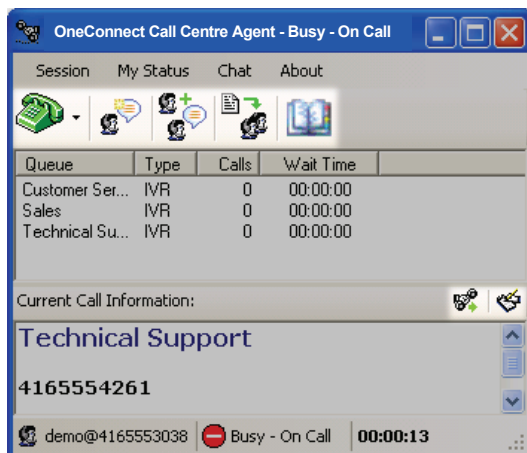
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OneConnect Call Centre agent states/modes and their definitions:

NOT READY	Agent is logged in however unable to receive calls, equivalent to unavailable or idle.
BUSY	Agent is unable to receive calls, equivalent to NOT READY.
WRAPPING UP	Equivalent to BUSY, a post-call state where any paperwork
OTHER	Equivalent to BUSY.
AVAILABLE	Agent is able to receive calls, equivalent to READY.

BECOMING FAMILIAR WITH THE BUTTONS

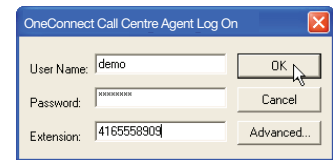
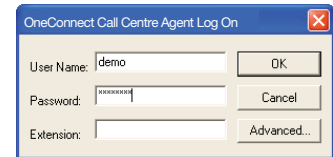


PROCEDURE

1. OPENING THE ONECONNECT CALL CENTRE AGENT

Start by launching the application from your Desktop Shortcut or Start menu. A login dialog box will appear. Enter your User Name and Password. In the Extension field, enter the phone number or direct extension number where you will be receiving calls—do not use any hyphens, letters, or special characters. Click OK.

NOTE: Logon credentials should be provided to you before you logon for the first time. See Appendix-Step 12 if you're having difficulty logging in, or consult your supervisor / local system administrator.



2. SWITCHING THE AGENT STATE TO AVAILABLE

To receive a call, change the agent state to available by navigating the mouse to My Status > Available.

This can also be done with the drop-down menu by the Change My Status button. Click on the button itself to toggle the agent state between Busy and Available.

The application opens in not ready (optional) mode. The inbound queue(s) that you are now logged into are displayed as well as the number of calls waiting in each queue.

NOTE: Hotkeys can also change.

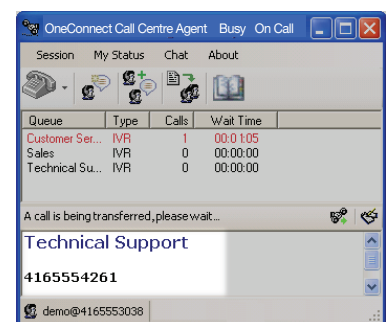


3. ACCEPTING THE CALL

When the agent state is set to available, an inbound call will be transferred to your phone/set, the caller information is displayed, this consists of the number and location the call is from (if available), and the inbound queue it is being routed through.

Accept the call by answering your phone.

If you do not answer your phone within the allotted time, you will receive the following message in the call info display: *Operation timed out (ring no answer) Please make sure your telephone is properly hooked.*



4.0. TRANSFERRING THE CALL

You may wish to transfer an active call to another agent or queue, or to an outside line.

Click the **Call Transfer** button located on the right portion of the screen. See screenshot.

To transfer a call to a queue, proceed to step 4.1.

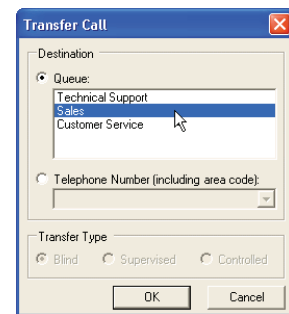
To transfer a call to a phone number, proceed to step 4.2.



4.1. TRANSFERRING THE QUEUE

Select one of the available queues and click OK.

After transferring your call, proceed to step 5.



4.2. TRANSFERRING TO A PHONE NUMBER

Change the Destination to **Telephone Number**, enter the number or choose a recent number from the drop-down menu.

There are three transfer types:

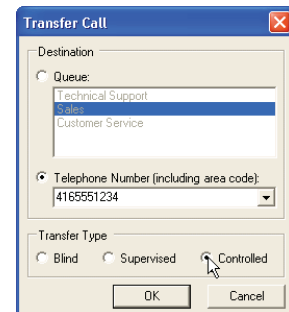
Blind: Call is immediately transferred.

Supervised: System verifies an answer on the far end.

Controlled: Allows agent to talk to far end first.

Select the desired transfer type, click **OK**.

NOTE: You can also transfer with the Phonebook. See Appendix-Step 9.



5. WRAPPING UP THE CALL

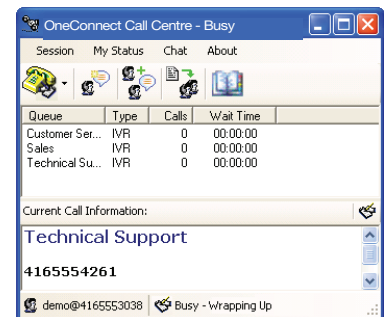
After a call ends or is transferred, the OneConnect Call Centre Agent will switch into a Busy – Wrapping Up agent state. This provides the time to complete any additional tasks or paperwork.

If call classification is mandatory, it will begin automatically.

Proceed to step 6.

NOTE: The **Call Classification** button can be used at any point during your call.

To skip call classification and take another call, change the state to available as in step 2.



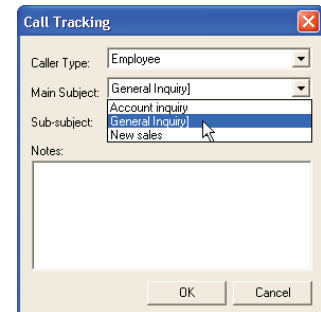
6. CALL CLASSIFICATION

Once in the Call Classification window, choose the appropriate selection from the *Call Subject* dropdown menu.

Next select the appropriate **Caller Type**.

More information can be added in the Notes window before **clicking OK**.

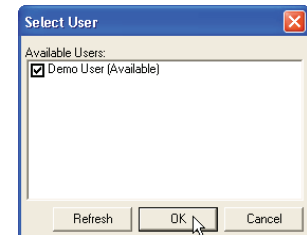
Now if you wish to take another call, change the state to available as in [step 2](#).



7.0. CHATTING START A CHAT SESSION

Click on the *Start a Chat Session* button or select the option from the Chat dropdown menu.

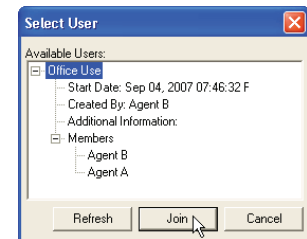
In the *Select User* window, place a checkmark next to the members you wish to add to the session and **click OK**.



7.1. CHATTING JOIN AN ACTIVE CHAT SESSION

Click on the *Join Chat Session* button or select the option from the Chat drop-down menu.

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



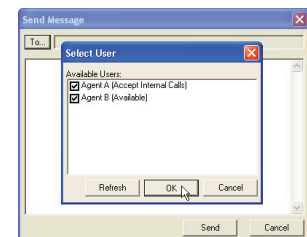
More information regarding chat sessions and their members can be displayed by clicking the “+” expansion buttons.

7.2. CHATTING BROADCASTING A MESSAGE

Click the *Broadcast A Message* button or select the option from the Chat drop-down menu.

Write your message in the *Send Message* window, to pick the recipients for your message, **click To...**

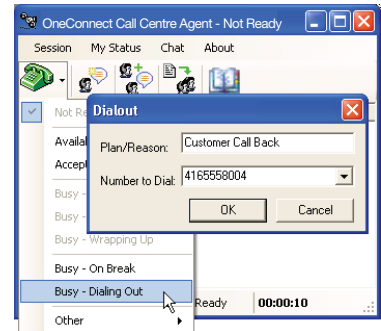
A *Select User* window will open. Select the recipients by placing a checkmark in the checkbox next to the user. **Click OK**. To send your message, **click Send**.



8. PLACING AN OUTBOUND CALL

To place an outbound call, select **Busy–Dialing Out** from the *My Status* dropdown menu.

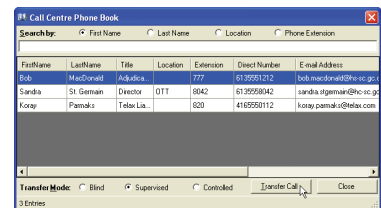
When the Dialout window appears, enter a reason for the call in the *Plan/Reason* field, then enter a number or select a recently dialed number from the dropdown menu next to *Number to Dial*.



9. PHONE / CONTACTS

The phonebook is not only a useful contact manager, it can be used to make outbound calls or transfer calls that are already in progress.

Open the *Phonebook* by clicking on the Phonebook button. The Phone Book window will open. Select the entry in the phonebook you wish to dial and click **Dial** or **Transfer Call**.

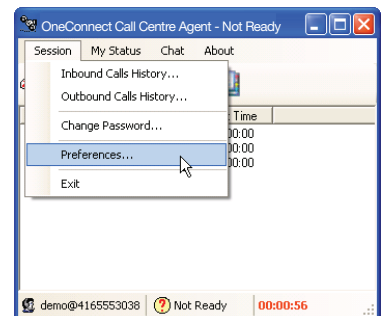


10. CHANGE PASSWORD / PREFERENCES

To change your password, select the **Session** drop-down menu and click Change Password.

To change application Preferences, select the **Session** drop-down menu and **click Preferences**.

Some changeable settings include the Font/Colors, Hotkeys, and Fade feature. [See Steps 10.1 and 10.2.](#)

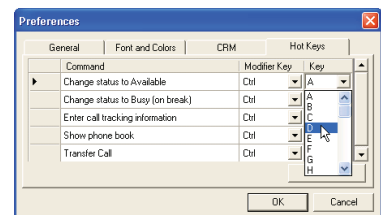


10.1. HOTKEYS

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

Navigate to the entry you wish to change and select the **Key** drop-down menu to assign a different letter or key.

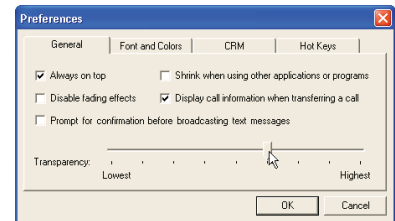
Modifier key drop-down options are: *Ctrl*, *Alt*, *Shift*, and *None*. It is recommended that *Ctrl* remains as the modifier key.



10.2. GENERAL USING THE FADE FEATURE

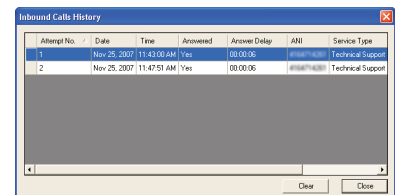
The application can remain on top of other windows in a transparent state. This may be useful to monitor the queue and caller information while using other applications on your computer.

Turn on the **Always on top** checkbox. Move the *transparency sidebar* to your desired state, highest being least visible.



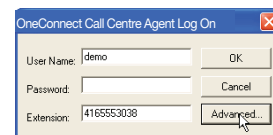
11. CALL HISTORY LOOKUP (INBOUND/OUTBOUND)

You may wish to call up a list of recent inbound or outbound calls. To do this, navigate to the *Session* drop-down menu and select either *Inbound Call History...* or *Outbound Call History...*

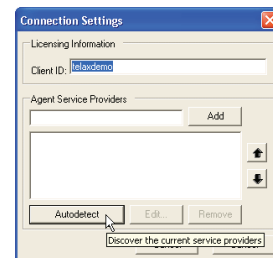


12. ADVANCED LOGON SETTINGS

If having trouble logging in with the *OneConnect Call Centre Agent Log On* window, **click Advanced**.

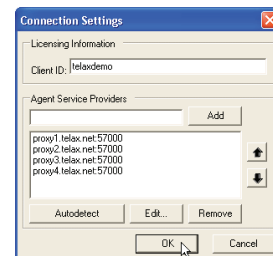


When the *Connection Settings* opens, check if the *Agent Service Providers* section is blank, if it is, click **Autodetect** to automatically detect and populate the correct Proxy settings.



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

A Proxy setting entry can also be added manually by clicking **Add**.



Verify that you are using the correct Client ID in the *Client ID* field, and **click OK**.

Now try to log on once more as you did in the beginning of the document. [See Step 1.](#)