Contact Center User Guide

Last Modified on 07/28/2023 5:45 pm EDT

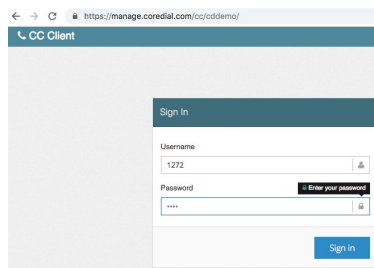## Contact Center Agent User Guide

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About This Guide

As a contact center agent, here are step-by-step instructions of most of the standard, customer-facing tasks you'll do within CoreNexa Contact Center.
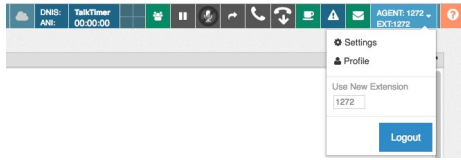
Tip: *For best results, please operate our product from a Chrome browser.*

Logging In and Out of CC Client

- Login
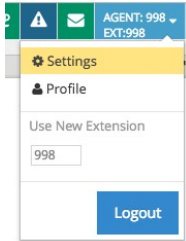
  - Enter your Username and Password

- Click **Sign In**

- Logout

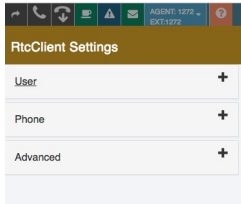 - Click your **Agent ID** in the upper right corner

- Click **Logout**

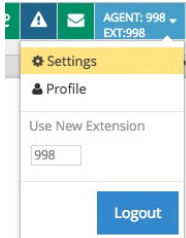1. Click your **Agent ID** in the upper right corner
2. Click Settings

- Click **User** to expand
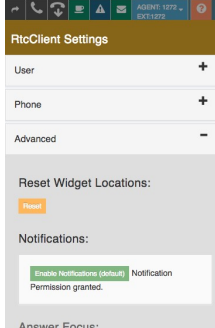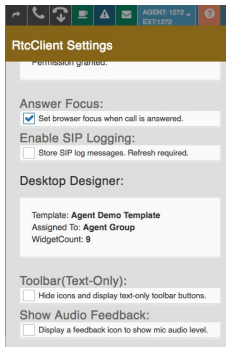

- Scroll down and click **Change Password**

1. Click your **Agent ID** in the upper right corner 2. Click **Settings**
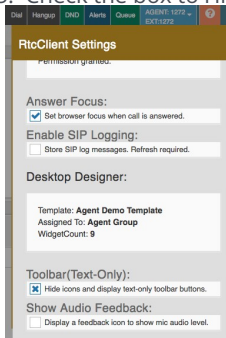

3. Click Advanced settings to expand

4. Scroll down to the **Toolbar (Text-Only)** section

5. Check the box to Hide icons and display text-only toolbar buttons

6. Uncheck the box to change back to icons

Nail Up Your Deskphone

This is for agents who have the red lock in their toolbar to use with a desk phone.

1. Option #1 - Call Into CC from Deskphone

- From your deskphone dial "Nail Up Ext"
  i. Ask your supervisor for this number
- Enter your CC agent ID followed by the pound sign (this can be found in the upper right corner of your toolbar)
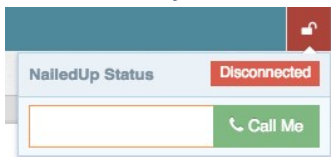

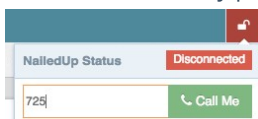- In your agent screen the **Red Lock** will change to **Green Lock**

  ● **Note:** *If you hang up the deskphone you will need to repeat the above steps*

2. Option #2 - Call Your Deskphone from CC

- Click the **Red Lock Button** in your Toolbar

- Enter your extension (if not already populated)

c. Click Call Me
d. Answer your phone and you will be connected

● **Note:** *If you hang up the deskphone you will need to repeat the above steps*

Go Ready (To Begin Taking Calls)
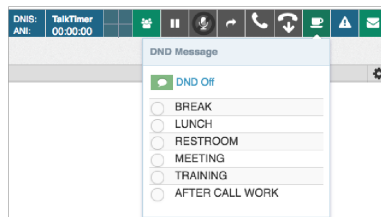
1. Click Go Ready

● **Note:** *If your **Nailed Up** lock is **red,** you will not be able to click Go Ready. Follow the steps above to Nail Up your deskphone.*
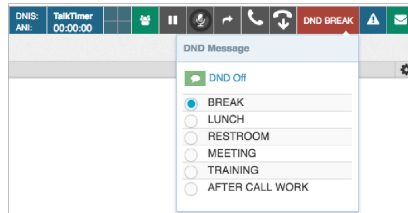
Do Not Disturb (Off Duty)

1. Go into a Do Not Disturb Status
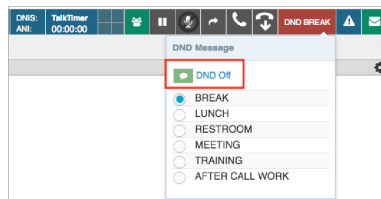- Depending on your display click the **Coffee Icon** or the **DND button**

- Choose a **DND Message**

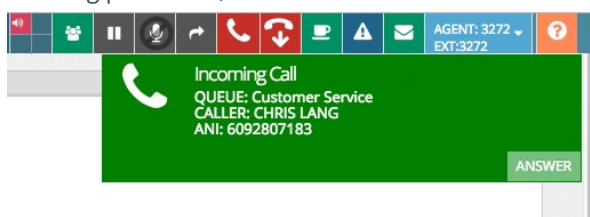2. Go back to a Ready Status
- Click **DND Off**

- You may need to click **DND** in the toolbar and then DND Off

Answer/Accept Queued Contact

When you have been assigned a queued contact (inbound call, sms, web chat, or email) you will be alerted in the upper right corner.

- If it is a incoming phone call, click **Answer**

- If it is a callback, message (call back with a message), SMS, web chat, or email click **Accept**

> **Note:** *Clicking accept for "New MESSAGE" will first play the message the caller left and then initiate the callback.*

Disposition Queued Contact

Once you have finished an inbound call, SMS, web chat, or email you have to choose a disposition before going back to a ready status
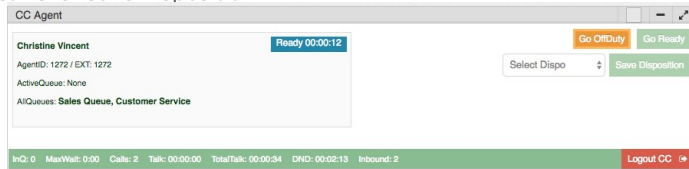
1. Click the Select Disposition drop down
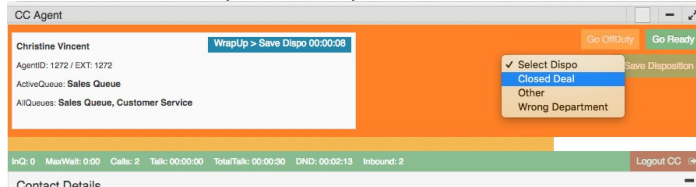
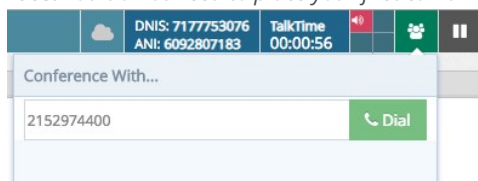2. Select your **disposition**

3. Click Save Disposition

Conference Call
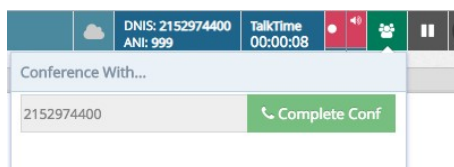
- While on an active call click the Conference button

- Enter the number or extension you want to conference in

> **Note:** *You do not need to place your first call on hold. The system will automatically do this for you*


- Click **Dial**

- When you are ready to merge the calls, click **Complete Conf**

- Once the calls have been merged you will have options on how to end the conference

  1. **Leave Conference -** Click **Leave Conference** if you want to keep the bridge open for the other callers

  2. **End Conference -** Click **End Conference** to end the call for everyone

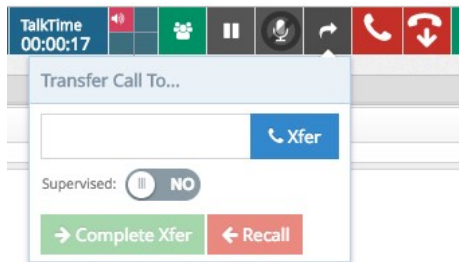1. **Remove one caller -** Click the **red x** next to the number that you want to remove from the conference
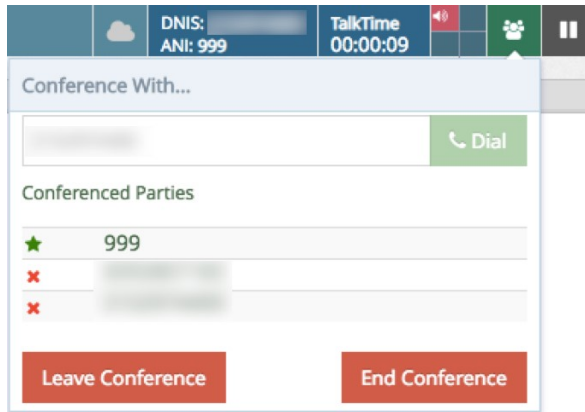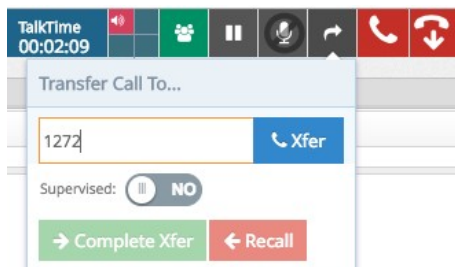

Transfer a Call

If you need to transfer a call, identify if you want to do an unsupervised (blind) or supervised (warm) transfer.

Supervised (Blind) Transfer

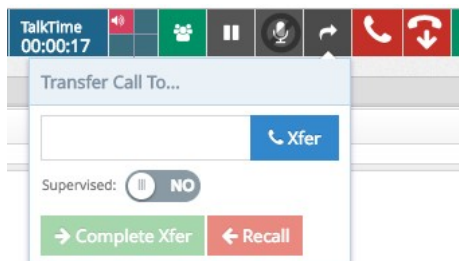- Click the **transfer button** in the toolbar to pop open the transfer options

- Set the Supervised toggle to **NO**
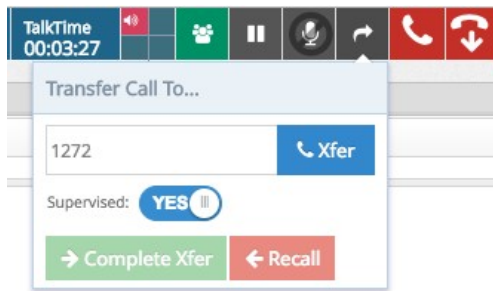- Plug in the number you want to transfer too in the text box
- Click **Xfer**
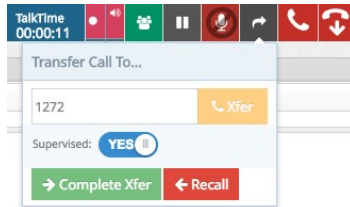

Supervised (Warm) Transfer

- Click the **transfer button** in the toolbar to pop open the transfer options
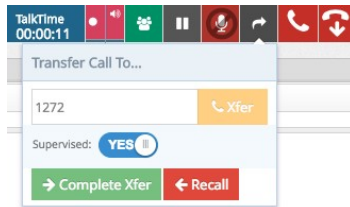

- Set the Supervised toggle to **YES**
- Plug in the number you want to transfer too in the text box 4.   Click **Xfer**
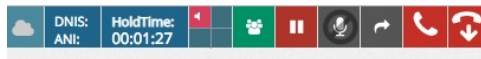
- If the person says they can accept the call, click **Complete Xfer**

- If the person says they **can't** accept the call, click **Recall**
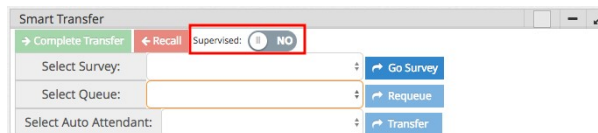

- If you clicked Recall, click the **hold** button to resume the initial call

Requeue a Call

If you need to transfer a call into a queue that you are not a part of, use the smart transfer widget.

- In the *Smart Transfer* widget, make sure the **Supervised Toggle** is set to **No**

- In the *Select Queue* dropdown, choose the queue you want to transfer the call to

- Click the **Requeue** button