

Read Me First: Initial download and installation should be performed by (or under the supervision of) your system administrator. If Agent and its related components are not configured for use on your system, do not proceed until this has been done.

Opening Agent

Agent is the primary tool you will use to interact with contacts for all media types. Agent also gives you access to your personal agent statistics.

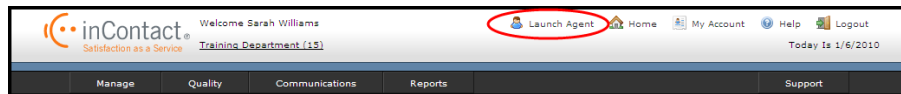
Launching Agent

1. Open an internet browser (IE 7 or IE 8-compatibility mode) and go to the URL:
<https://login.incontact.com/>

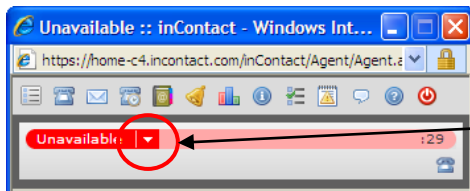
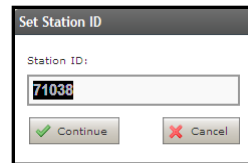
2. Enter your **Username** and **Password** provided by your system administrator and click **Login**.



3. Click on the **Launch Agent** link at the top right.



4. Enter your **Phone number** or **Station ID**.
5. The Agent interface will open.
6. Select your **Availability** status by clicking the arrow.



Your Status is Color Coded:
Unavailable – not ready for contacts
Available – ready for contacts
Inbound – on an inbound contact
Outbound – on an outbound contact
Wrap – doing after contact work

Using the Agent Phone

Agent Phone gives you access to all phone features. It opens when an inbound phone call is received or when an outbound phone contact is initiated from Agent.

Initiating an Outbound Phone Call

1. In Agent, click the Phone icon in the menu.
2. Type in the phone number followed by enter.
3. The server will ring your desktop to connect with you (if not already established), then it will dial the phone number and transfer it to your phone.



Call Options

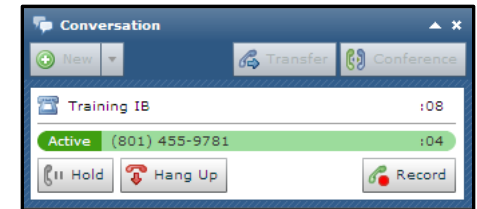
Place a call on hold by clicking **Hold** in Agent Phone. You can then dial a different extension or phone number to transfer to or conference together.

If you speak with the destination party before completing the transfer, the following options are available on the Agent Phone menu while you are connected:

Resume- If you select Resume, it will activate that phone contact.

Conference- Joins all three parties together. *Must have call active.

Transfer- Connects the other two parties together without you.




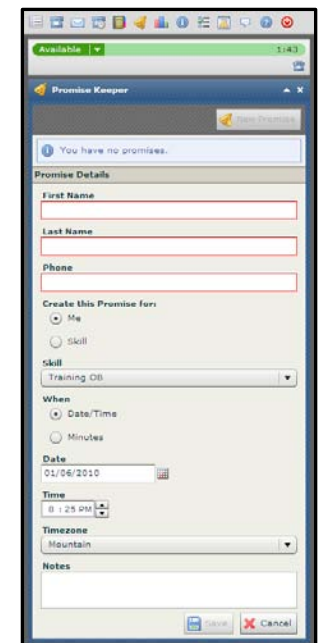
Using Touch Tones While on a Call

If necessary you may enter digits while on a call to navigate through menu options. In the Agent Phone window select the music note icon as shown to the right to turn on touch tones. After selecting it On, you may click or type in the desired digit.



Scheduling a Promise Keeper Callback

1. From the Agent toolbar, click the bell icon . This opens the Promise Keeper Panel.
2. Click the New Promise button.
3. Enter a First and Last Name and Phone Number.
4. Select who the Promise is for, select Me if you will be responding or select Skill if anyone on your team can respond.
5. Select what Skill can respond from the drop down menu.
6. Select When you would like the action to occur.
Minutes - Select this if you want the callback to execute after specified number of minutes.
Date/Time – Select this if you want the callback to execute on a specific day, at a specific time.
Then Select the Minutes, Date, and or Time.
7. Select the Time Zone of the person to callback.
8. Enter any additional notes in the Notes field.
9. Click **Save** to confirm your Promise Keeper callback.



Address Book

Shows a list of agents and skills to which a call can be transferred (re-skilled). The address book also shows the current state of each agent.

Promise Keeper

Allows you to create a reminder to call somebody. Create a reminder for yourself or anyone with a specific skill.

Agent Reports

Three standard reports available to help you review your contacts and your performance. Reports include Contact History, Personal Stats, and Productivity.

Information

Provides basic information including agent ID, station ID, servers logged into, skills assigned.

Options

Choose your button style and font size. Change the number and urgency of messages recorded in the Event Log.

Call History

Shows a history of inbound and outbound calls that have been received and dialed

Queue

Shows a list of all your skills that currently have contacts in queue. Each entry includes the number of contacts in queue and the longest duration.

Phone

Place an outbound call or press touch-tones during an active call. Call History can also be opened from this panel.

Email

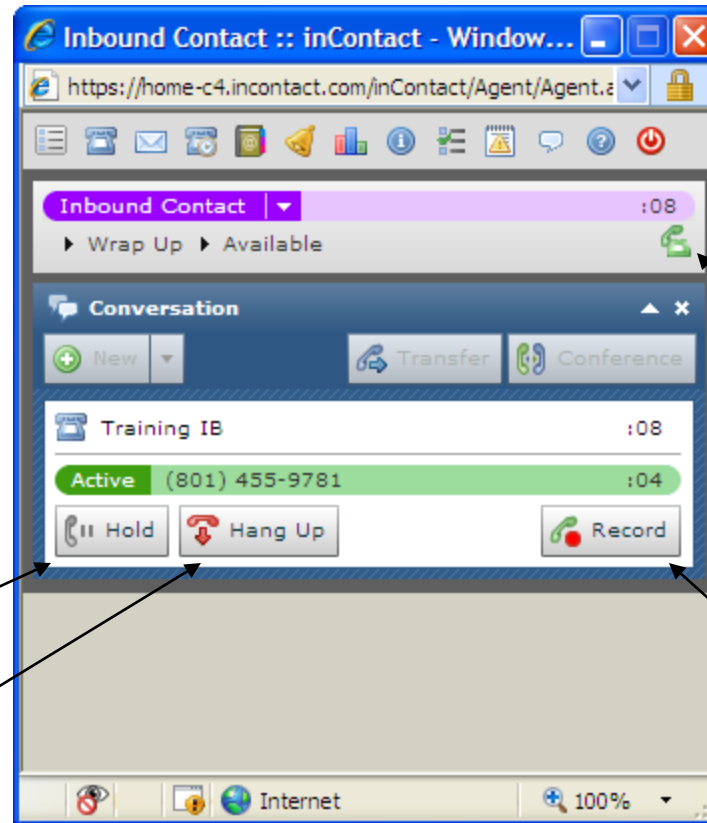
Initiate an outbound email if you have the appropriate skill.

Hold

Place a caller on hold. This enables the Transfer and Conference options.

Hang Up

Ends the call.



Event Log

Shows special messaging used for troubleshooting purposes.

Exit

Logs you out and ends your session. Simply closing your browser will NOT end your session. **Note!** If you close the browser window by clicking the X button, you will be logged out (after two hours).

Help

Provides help for using the Agent application. Include manuals and release notes..

Connection Status

Shows if you are connected to the inContact Server. Green is connected. Blue is not connected.

Feedback

Submit suggestions and trouble tickets.

Record

Records the contact. The contact may be recorded automatically.