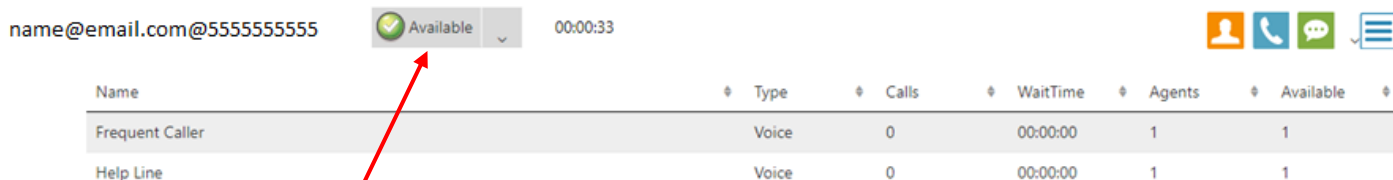


Using the Cloud Web-based Contact Center Agent

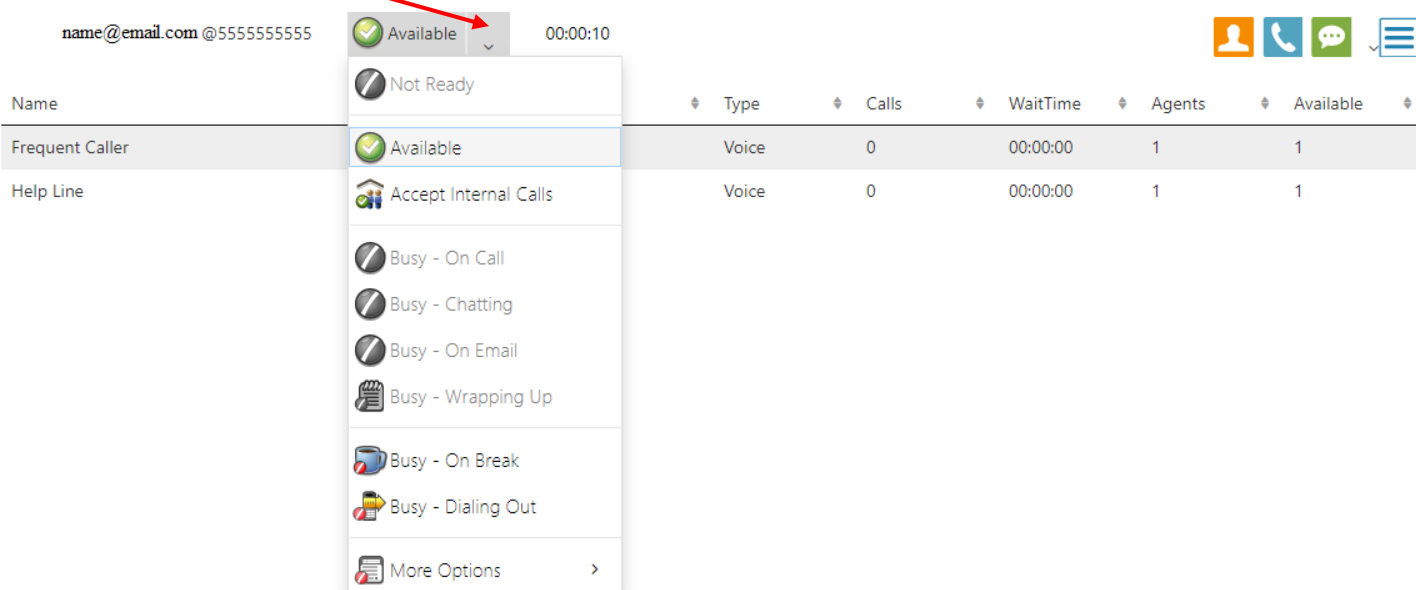
1. The following screen will appear after you login.



name@email.com@5555555555 Available 00:00:33

Name	Type	Calls	WaitTime	Agents	Available
Frequent Caller	Voice	0	00:00:00	1	1
Help Line	Voice	0	00:00:00	1	1

2. You are logged in as “**Available**” and will begin receiving calls. You may change your status by clicking on the **down arrow** next to “Available” and choose the desired status.

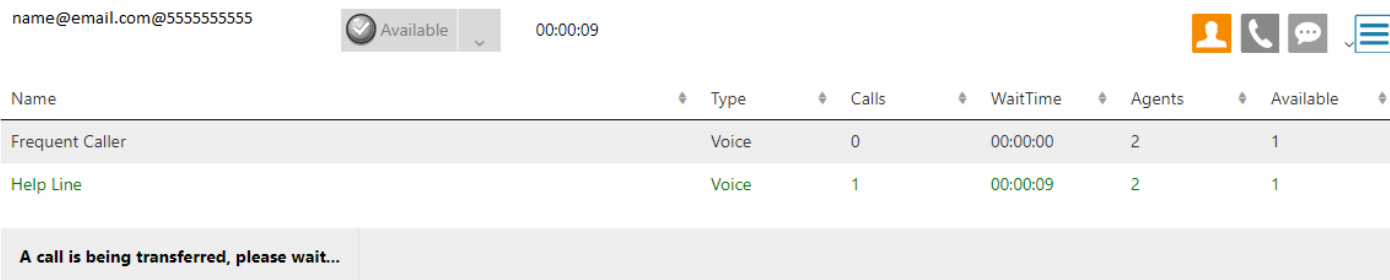


name@email.com @5555555555 Available 00:00:10

Name	Type	Calls	WaitTime	Agents	Available
Frequent Caller	Voice	0	00:00:00	1	1
Help Line	Voice	0	00:00:00	1	1

- Not Ready
- Available
- Accept Internal Calls
- Busy - On Call
- Busy - Chatting
- Busy - On Email
- Busy - Wrapping Up
- Busy - On Break
- Busy - Dialing Out
- More Options

3. When a call is sent to you the Caller ID, Name and Number of the inbound call populates if available.



name@email.com@5555555555 Available 00:00:09

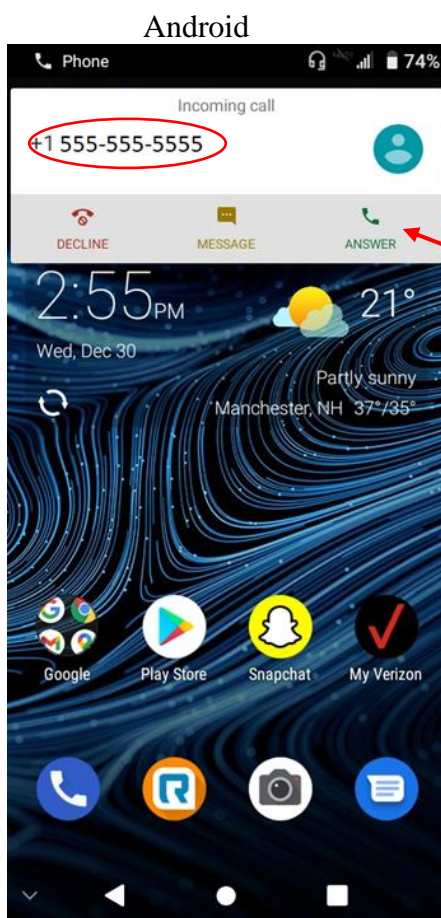
Name	Type	Calls	WaitTime	Agents	Available
Frequent Caller	Voice	0	00:00:00	2	1
Help Line	Voice	1	00:00:09	2	1

A call is being transferred, please wait...

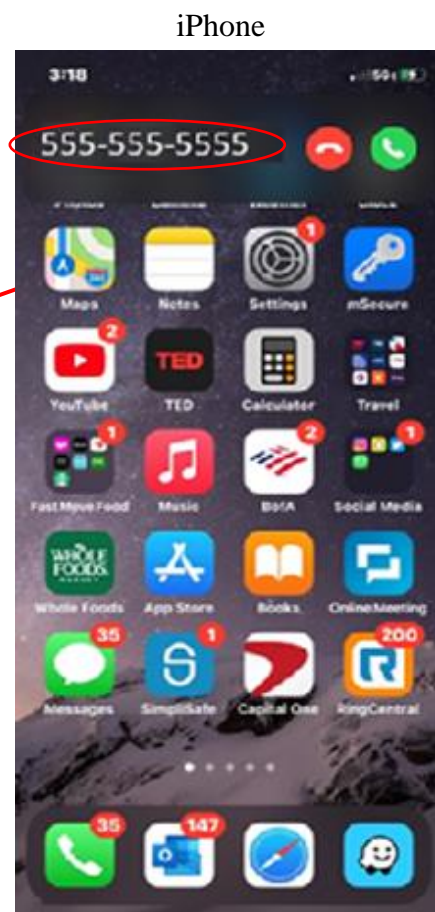
Help Line

SOUTH BOSTON MA 5555555555 USA (Massachusetts)

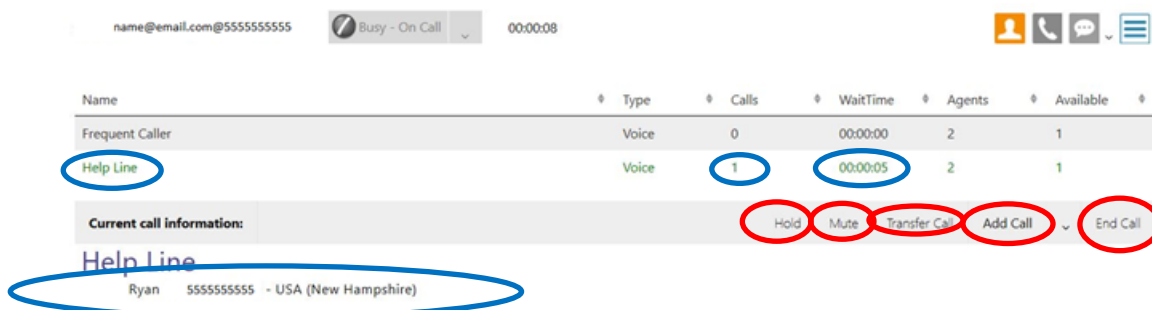
- The caller is sent to your mobile device and includes the same telephone number as seen in your call center app. This confirms the call is from your call center. Once caller ID is confirmed click **“Answer”** on your phone.



Click
Answer



5. While on a call you will see the following information:
 - a. **The name, telephone number and location of the caller if available**
 - b. **Name of the call queue/group**
 - c. **Number of calls in the queue/group**
 - d. **The duration the caller waited to be answered**
6. While on the call you may perform the following call functions:
 - e. **Place caller on Hold**
 - f. **Mute caller**
 - g. **Transfer Call to another representative**
 - h. **Create a conference call with the Add Call key**
 - i. **Hang up by pressing End Call**



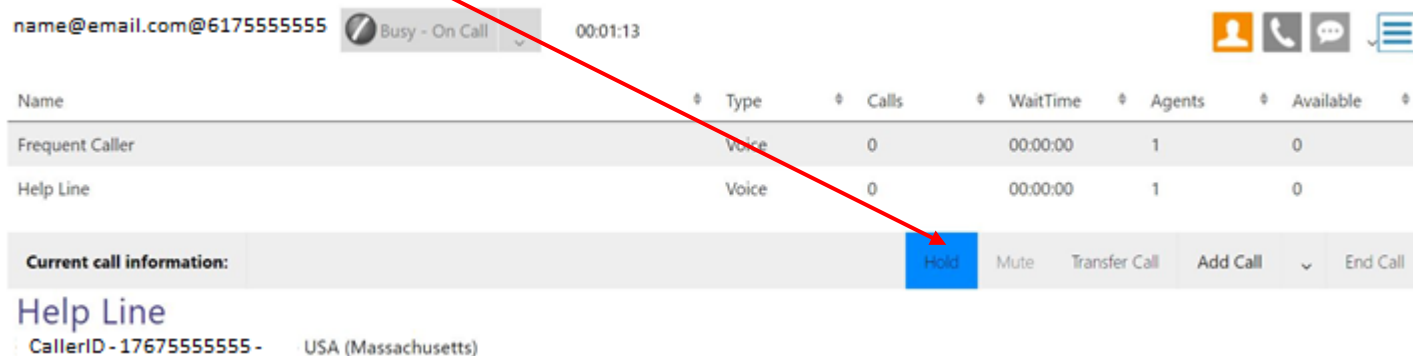
name@email.com@5555555555 Busy - On Call 00:00:08

Name	Type	Calls	WaitTime	Agents	Available
Frequent Caller	Voice	0	00:00:00	2	1
Help Line	Voice	1	00:00:05	2	1

Current call information: Hold Mute Transfer Call Add Call End Call

Help Line
Ryan 5555555555 - USA (New Hampshire)

7. Press **“Hold”** to place the caller on hold. The buttons will light up **blue** when you click it indicating it is in use. Click the **“Hold”** button again to take the caller off hold (blue disappears).



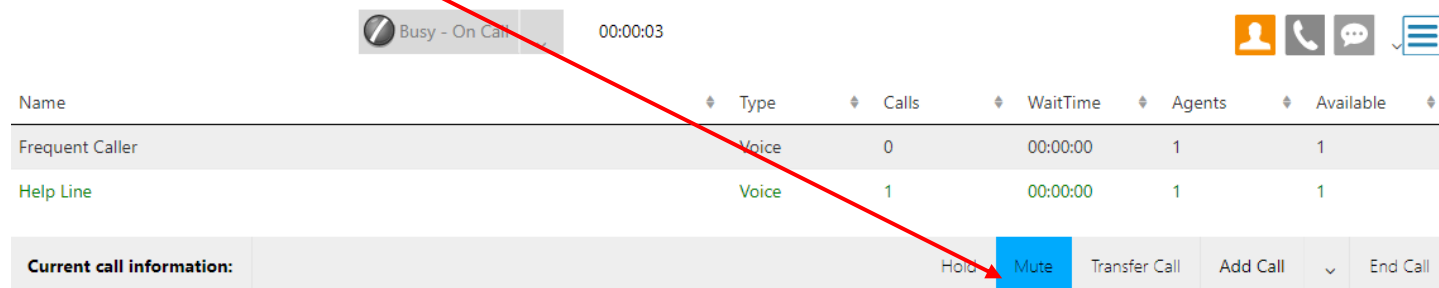
name@email.com@6175555555 Busy - On Call 00:01:13

Name	Type	Calls	WaitTime	Agents	Available
Frequent Caller	Voice	0	00:00:00	1	0
Help Line	Voice	0	00:00:00	1	0

Current call information: Hold Mute Transfer Call Add Call End Call

Help Line
CallerID - 17675555555 - USA (Massachusetts)

8. Press the **“Mute Button”** to mute yourself on the call. The button will light up blue indicating it is in use. Click the mute button again to unmute yourself.



Busy - On Call 00:00:03

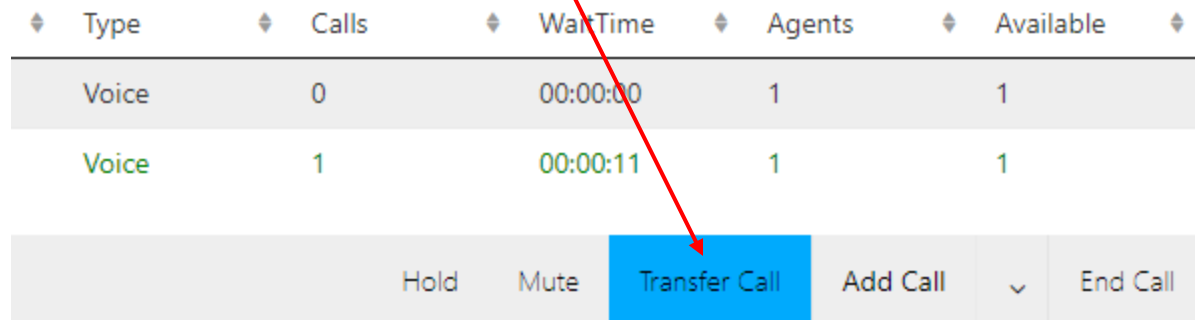
Name	Type	Calls	WaitTime	Agents	Available
Frequent Caller	Voice	0	00:00:00	1	1
Help Line	Voice	1	00:00:00	1	1

Current call information: Hold Mute Transfer Call Add Call End Call

Help Line

- USA (New Hampshire)

9. To transfer a call press the **Transfer Call** button. The button will light up blue indicating it is in use.



Type	Calls	WaitTime	Agents	Available
Voice	0	00:00:00	1	1
Voice	1	00:00:11	1	1

Hold Mute Transfer Call Add Call End Call

10. Pop up window appears with **Destination**, **Transfer Type** radio buttons and **Destination Number**, **Recent Destinations** fields.

While in the window the following are an option:

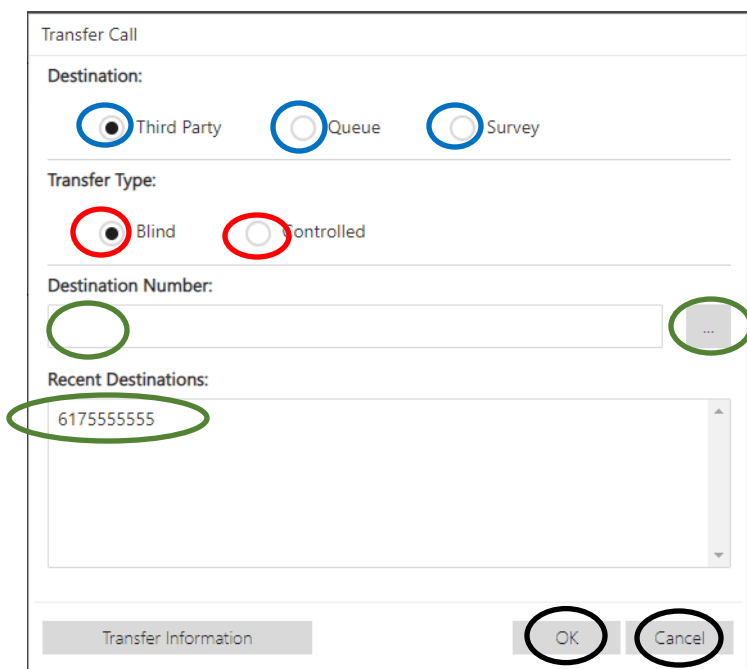
- e. **Transfer the call to a third party**
- f. **Transfer the call to a queue/group**
- g. **Transfer to a survey if applicable**

While on the call you may choose a transfer type:

- e. **Blind Transfer - no announcing prior to transfer**
- f. **Controlled Transfer - announce inbound call to the transferred party**

Finally choose the destination of the transfer:

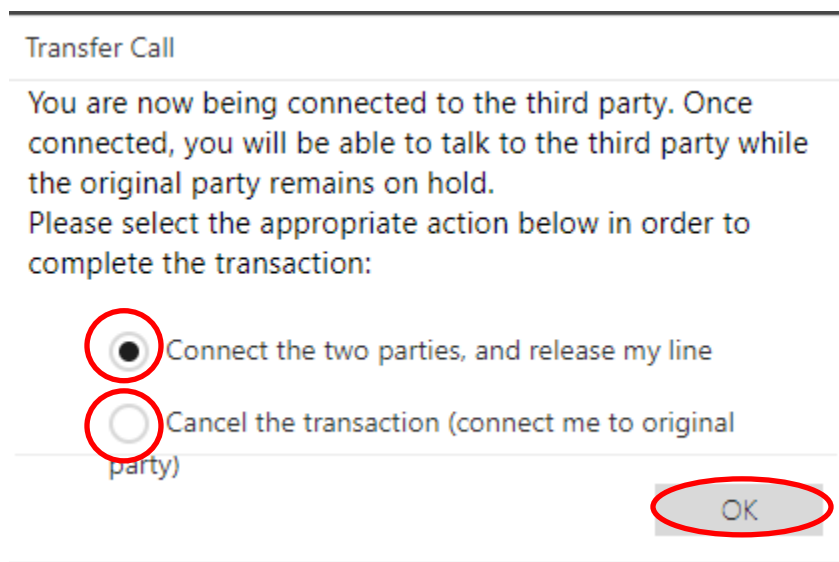
- g. **Destination Number - the group, outside phone number you are sending the caller to**
- h. **Recent Destinations - list of the last numbers you transferred calls to**
- i. **Phonebook – click on the box with 3 dots to open your phonebook.**



11. Press **OK** to make start the transfer. Press **Cancel** to stop the transfer.

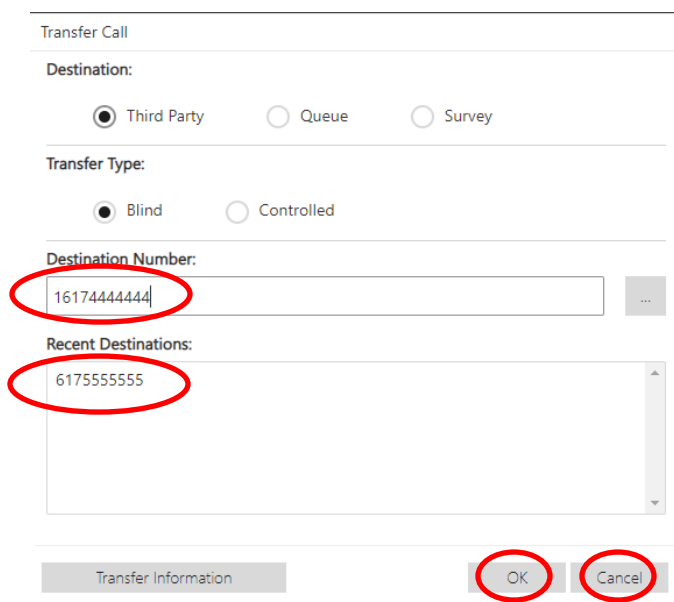
12. When you select “**Controlled Transfer**”, you will see this window:

- a. “**Connect the two parties and release my line**” – This allows you to announce the caller to the transferred party and then exit the call which disconnects you from the call.
- b. “**Cancel the Transaction**” is used if the party you attempted to transfer to is unavailable or unable to assist the caller.



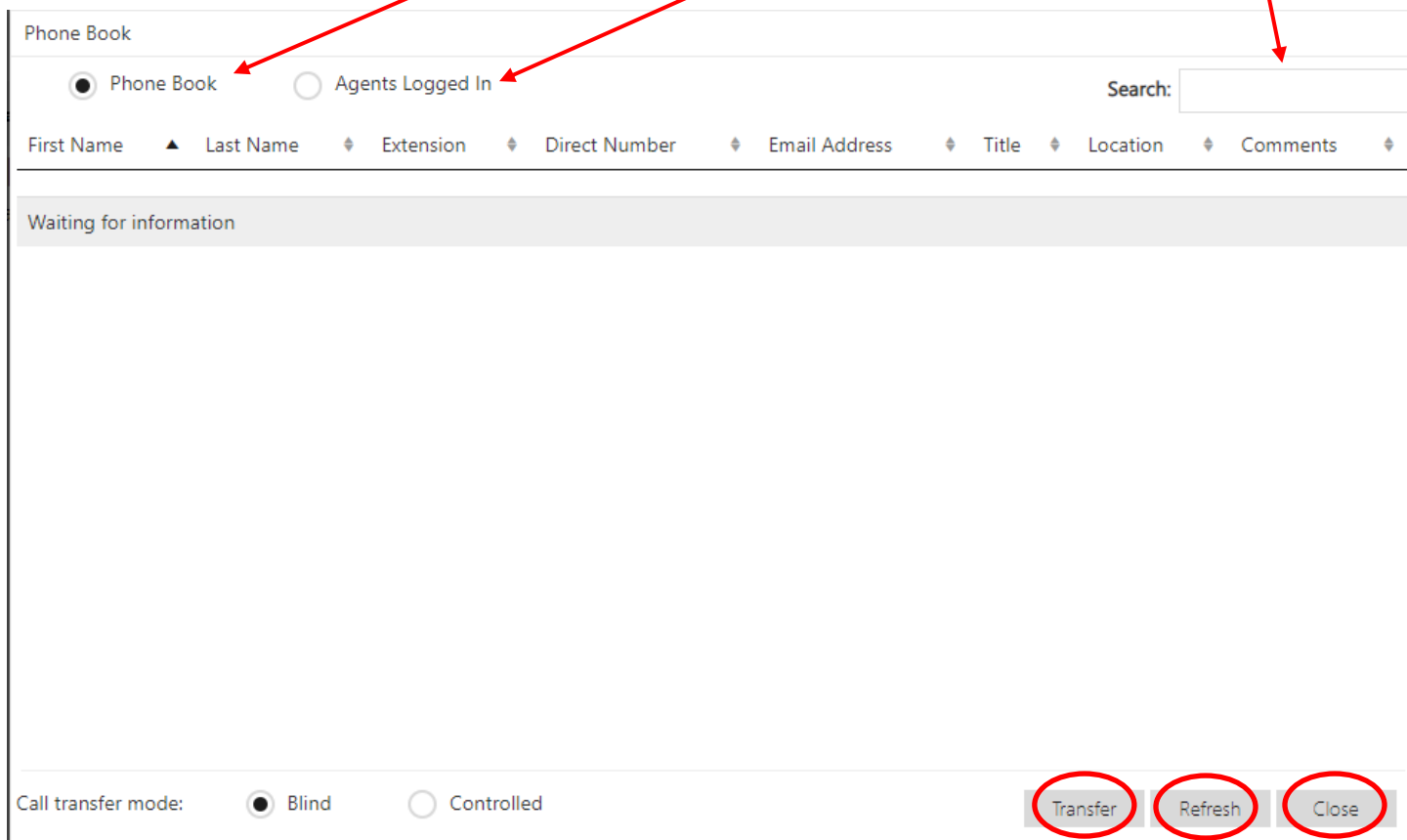
13. Press **OK** to save this selection.

14. Type in the 10-digit phone number in the **Destination Field** or click on a most recent transfer in the **Recent Destinations** field to transfer using that selection.



15. Press **OK** to make start the transfer. Press **Cancel** to stop the transfer.

16. If you click on the “**Phone Book**” button, a new pop-up window will appear. There are three options to choose a destination from. You can choose the **Phone Book**, the **Agents Logged In**, or the **Search Field** on the right side of the window.



Phone Book

Phone Book Agents Logged In

Search:

First Name ▲ Last Name ◆ Extension ◆ Direct Number ◆ Email Address ◆ Title ◆ Location ◆ Comments ◆

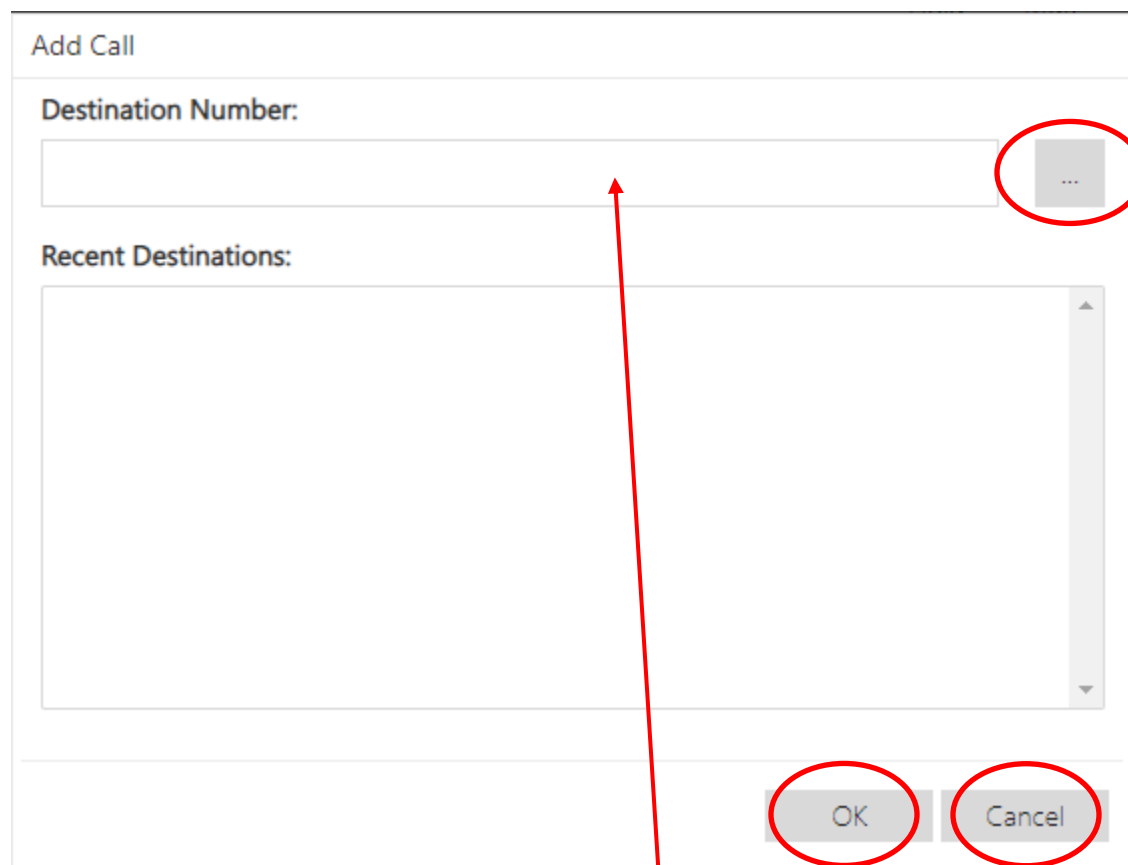
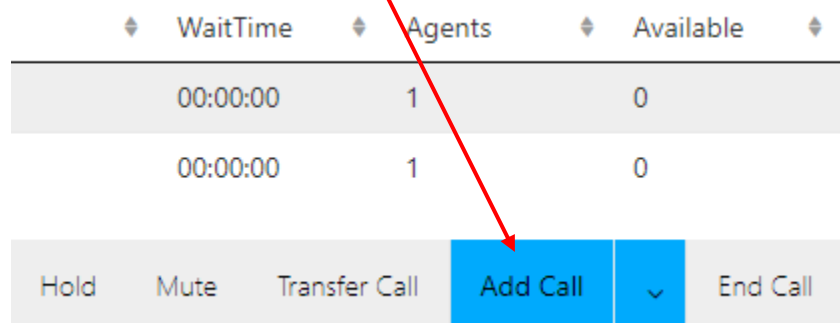
Waiting for information

Call transfer mode: Blind Controlled

Transfer Refresh Close

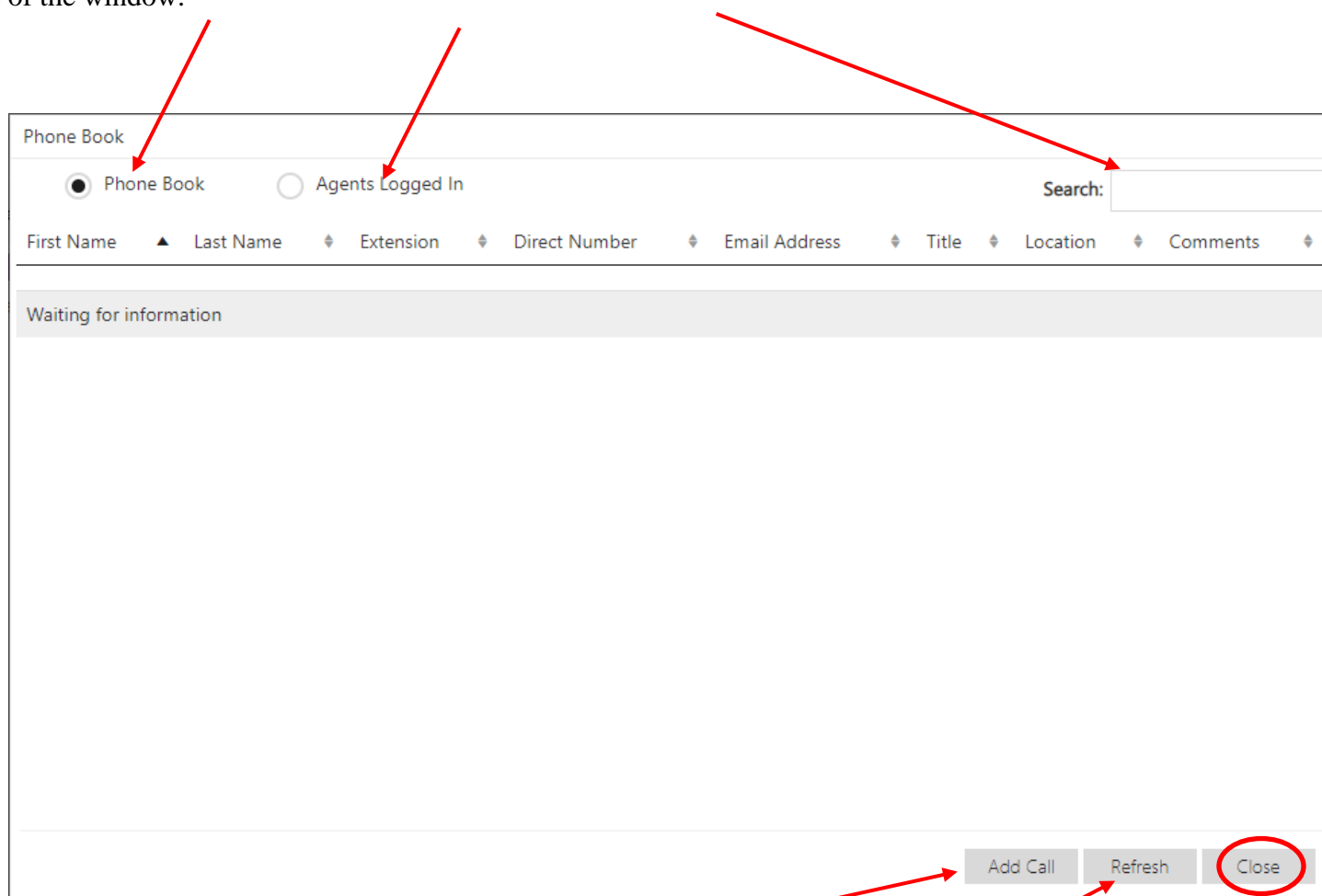
17. When you have made your selection, press **Transfer** to transfer the call. Press **Refresh** to see the most recent agents logged in. Press **Close** to cancel the transfer.

18. Press the “**Add Call**” button to add a call to a third party while on a call. The button will light up blue indicating it is in use.



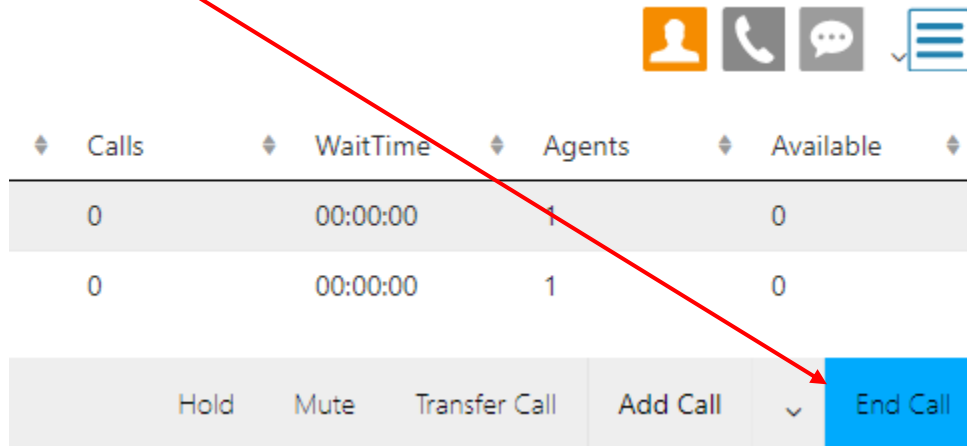
19. A pop up window will appear. Click on “**Destination Number**” field and type in the 10-digit telephone number you wish to add to the existing call or select a number from **Recent Destinations**. Press **OK** if you type in the number only. You can also click the square box with three buttons to bring you to the **Phone Book**. Press **Cancel** to stop the add call process at any time.

20. If you select the phone book a new pop-up window will appear. There are three options to choose a destination from. You can choose the **phone book**, the **agents logged in**, or the **search field** on the right side of the window.



21. When you have made your selection, press **Add Call** to add a call. Press **Refresh** to see the most recent agents logged in. Press **Close** to cancel the dialing.

22. Press **End Call** to end a call at any time. The button will light up blue indicating it is in use.



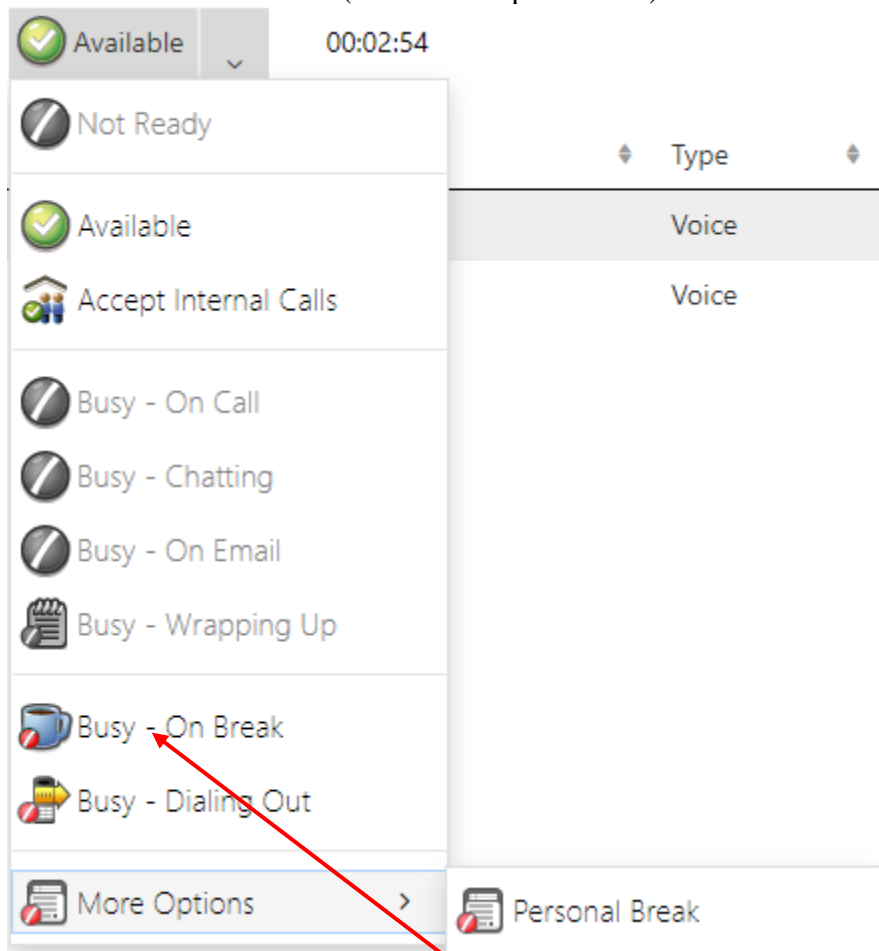
Call control icons: Person, Phone, Chat, Menu

Calls	WaitTime	Agents	Available
0	00:00:00	1	0
0	00:00:00	1	0

Call control buttons: Hold, Mute, Transfer Call, Add Call, End Call

How to use Break Status

23. The grey options are not available to be chosen at this time. **Busy - On Break, Busy – Dialing Out** and **Personal Break** (click more options first) can be chosen as a status.



24. Click the drop-down menu and click **“Busy - On Break”**. Being in “Busy - On Break” will take you out of the queue as a “do not disturb” option and you will not receive any calls.

25. You can see the “**Help Line**” in red indicating a call is waiting in the queue due to your busy status and if there are no other agents in available status, the call remains in the queue.

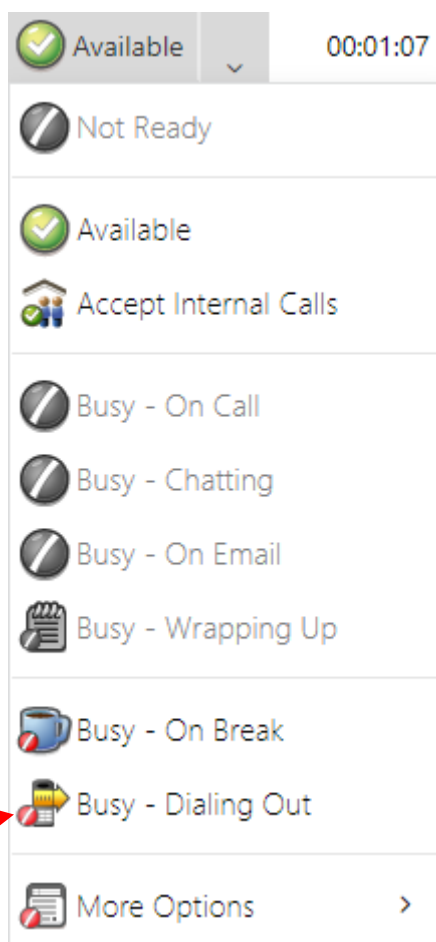
Busy - On Break 00:03:05

Name	Type	Calls	WaitTime	Agents
Frequent Caller	Voice	0	00:00:00	1
Help Line	Voice	1	00:02:19	1

26. Click on arrow in **More Options**, then click **Personal Break** to put yourself in a busy status similar to “Busy – On Break” that tells your manager you are on a personal break. You will still not receive any calls while in this status.

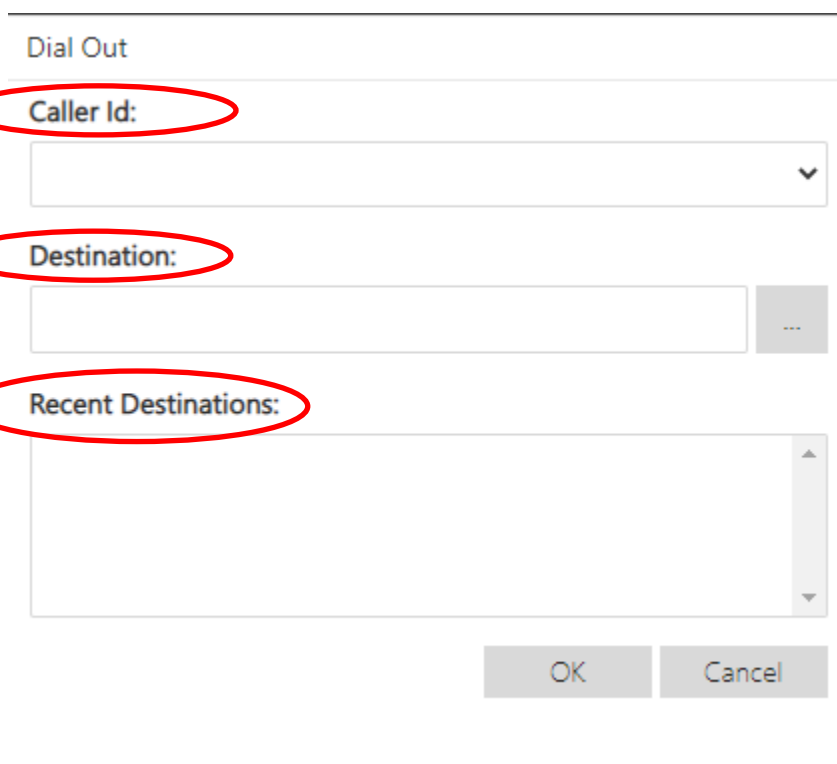


Making an Outbound Phone Call



27. Press **Busy - Dialing Out** in the drop-down menu.

28. Now a pop up will appear asking you to pick a **caller ID**, select a **destination** or select a **recent destination**.

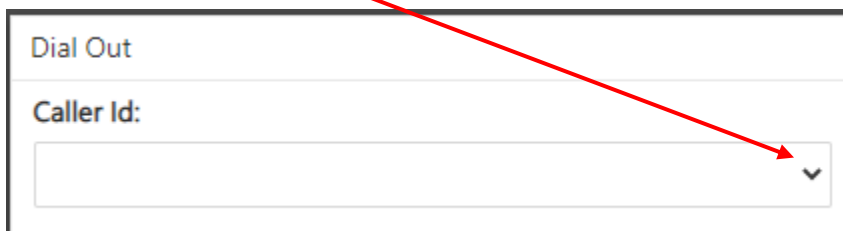


The image shows a 'Dial Out' dialog box with three main sections, each with a label circled in red:

- Caller Id:** A dropdown menu.
- Destination:** A text input field with a grey button containing three dots to its right.
- Recent Destinations:** A list box with a vertical scrollbar on the right side.

At the bottom right of the dialog box are two buttons: 'OK' and 'Cancel'.

29. Select the **arrow** of the first drop down menu for selecting a caller ID if one is available.

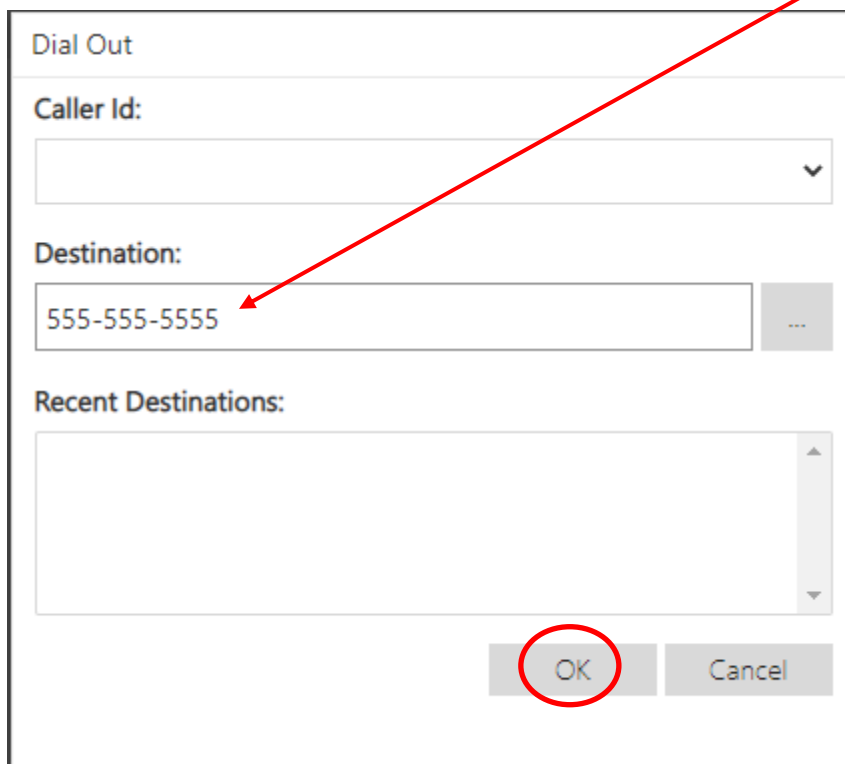


Dial Out

Caller Id:

[Empty dropdown menu with a downward arrow]

30. You can now dial any **10-digit number** of your choice by typing it in the **Destination field**. Click **OK** to make the call.



Dial Out

Caller Id:

[Empty dropdown menu with a downward arrow]

Destination:

555-555-5555 [More options icon]

Recent Destinations:

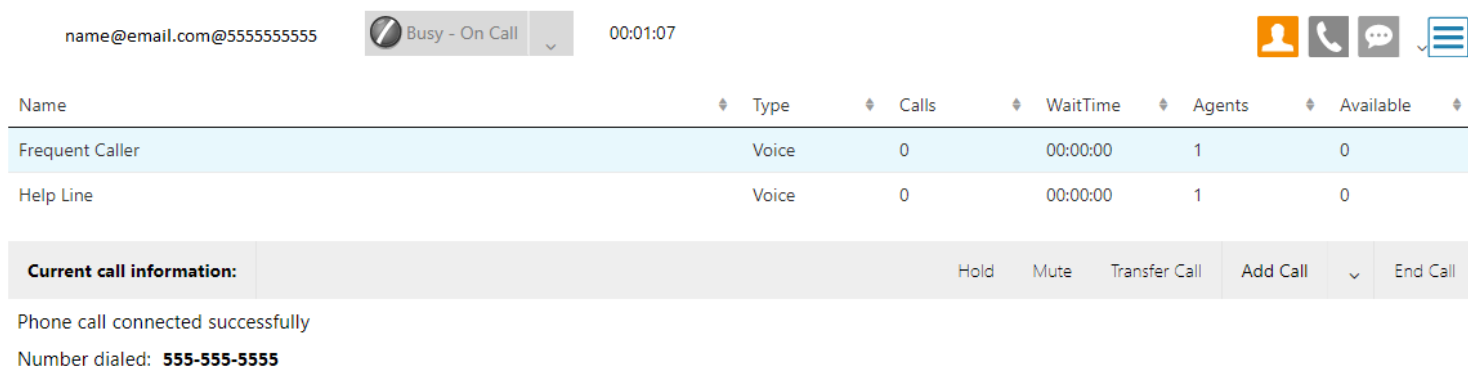
[Empty list box with scrollbars]






OK Cancel

31. Your status will now grey out and change to “**Busy – Dialing Out**”. This is what it looks like when the system is sending a call to your cell phone. You then will pick up the call on your end and the call will immediately be placed to the called party now using your cell phone.



32. When the call is answered the app in your browser will now display this screen. Notice how your status changes to “**Busy – On Call**”.



name@email.com@5555555555  Busy - On Call 00:01:07    

Name	Type	Calls	WaitTime	Agents	Available
Frequent Caller	Voice	0	00:00:00	1	0
Help Line	Voice	0	00:00:00	1	0

Current call information: Hold Mute Transfer Call Add Call End Call

Phone call connected successfully
Number dialed: **555-555-5555**

How to use Phonebook to Place a Call

33. To place calls using the **phone book** select the **button** to the right of 2nd Field down (Destination).

Destination:

34. A new pop-up window will appear. There are three options to choose from. You can choose the **phone book**, the **agents logged in**, or the **search field** on the right side of the window.

Phone Book

Phone Book Agents Logged In Search:

First Name ▲ Last Name ◆ Extension ◆ Direct Number ◆ Email Address ◆ Title ◆ Location ◆ Comments ◆

Waiting for information

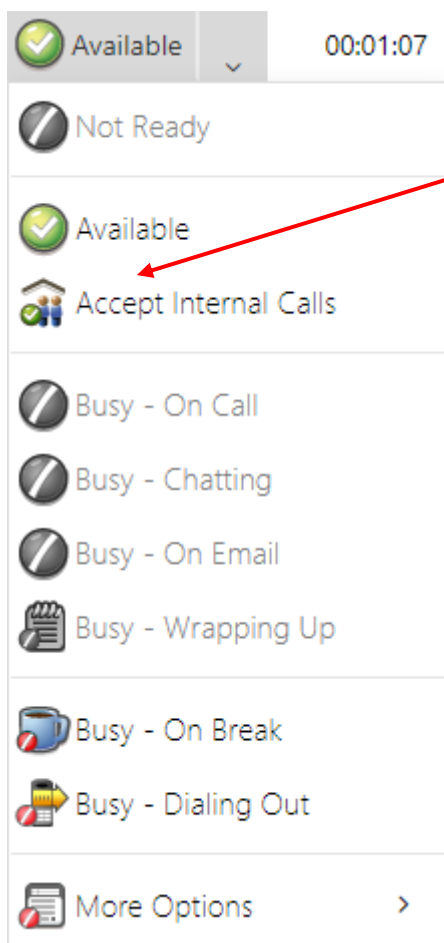
When you have made your selection, press **Dial** to call out.

To see new “Agents Logged In” press **Refresh**.

To cancel using the phonebook, press **Close**.

How to Accept Internal Calls from your Call Center Representatives

35. To accept internal calls from within the Samaritan organization only then press “**Accept Internal Calls**” in the drop down menu. You will not receive any calls from the groups/queues but you will receive calls from other agents or managers.



How to Accept Outside Calls from the Queue/Group

36. Click on “**Available**” in the drop-down menu to immediately begin receiving calls from the call group/queues.

