SmartAgent User Guide

Agent Guide

Starting your **Smart**Agent Journey

Version	**Date**	**Author**	**Changes**
2.86	14/05/24	Paul Egan	Report an Issue

Introduction

The purpose of this guide is to provide you with an introduction to using SmartAgent for contact management.

There are different training modules to work through depending on your role and some of the settings on display in this guide may not have been enabled for your system.

Your Project leaders will provide guidance on which features have been enabled for your organisation.

Pre-requisites for this training

To successfully complete this **Smartagent - Agent User guide** you will require the following:

1. Access to a workstation
2. Access to the internet
3. **Google Chrome or Microsoft Edge browser**
4. A suitable headset, preferably a USB one
5. Your SmartAgent username and Password or sign-in credentials
6. A mobile phone / external phone to use in simulating a call
7. Confirmed that at least 2 users have logged into the UAT Environment and are available for the training session at the scheduled time

Duration of this training

Whilst the first time we run through this training we would anticipate their being some additional questions around rollout and procedural changes, under normal conditions we would expect that this session would typically be run within **20 Minutes**.

Who Should attend this training?

This training is for anyone using SmartAgent to receive inbound or make outbound contacts. It covers the key contact navigation and support mechanisms to assist agents if they need to transfer a call to another department.

Agenda

Module 1: Getting Started

- Logging in to SmartAgent using a Password
- Logging in to SmartAgent using Single sign-on
- Notifications & cookies
- Getting ready to take calls - Setting your status
- What to do for breaks & lunch – next status
- At the end of your shift

Module 2: Contact Navigation

- Answering an inbound voice call
- Understanding tags / Whispers
- Holding, resuming & muting a call
- Transferring a call
- Using Quick Connects
- Making an outbound call
- Understanding After Contact Work
- Call history & Contact History

Module 3: Agent Support Tools

- Hands Up
- Announcements
- Agent Directory
- Supervisor Monitoring & Barge
- Report an Issue
- My Scores (QA Module)

Module 4: Other Channel & Special Contacts

- Answering Chat / webform/email / Social contacts
- Quick replies
- Formatting and attachments
- Email additional options
- Multi-party calling

Module 1: Getting started

By the end of this module, you will be able to:

- Log in successfully
- Enable microphone and notifications
- Change your status
- Know what to do for your lunch and breaks
- Know what to do if your call overruns into a break/lunch
- Log out successfully

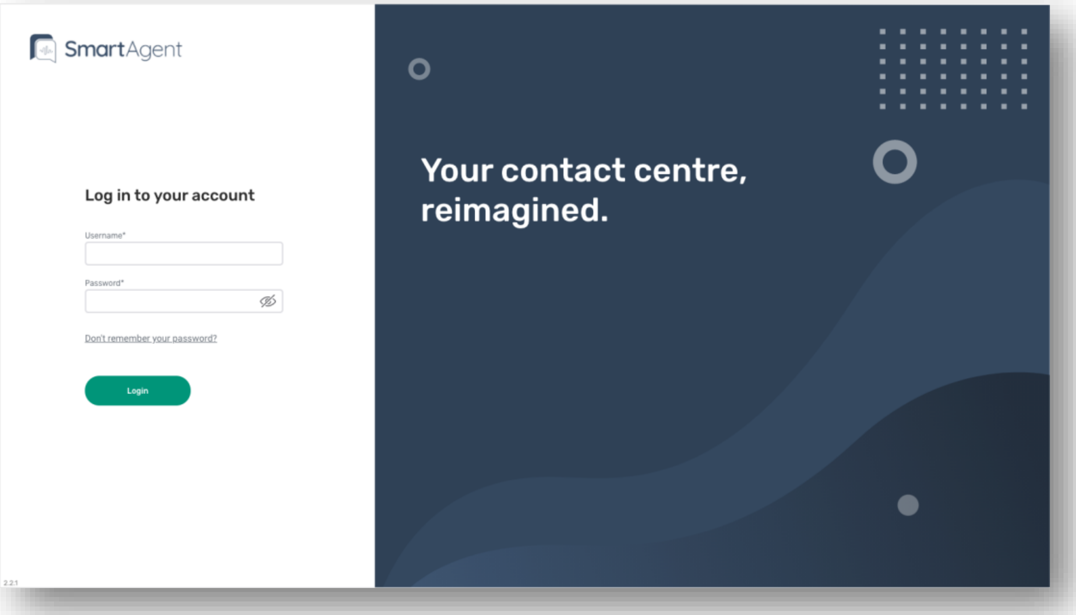
Accessing SmartAgent

SmartAgent must be loaded using Google Chrome or Microsoft edge browsers by opening the link supplied to your organization. You should ensure you have a USB headset attached to your computer.

You will also need to ensure you have a stable internet connectionto make and receive contacts.

Logging in to SmartAgent using a Password

1. Open the SmartAgent application in your Google Chrome browser. You will be presented with the main SmartAgent log in screen.



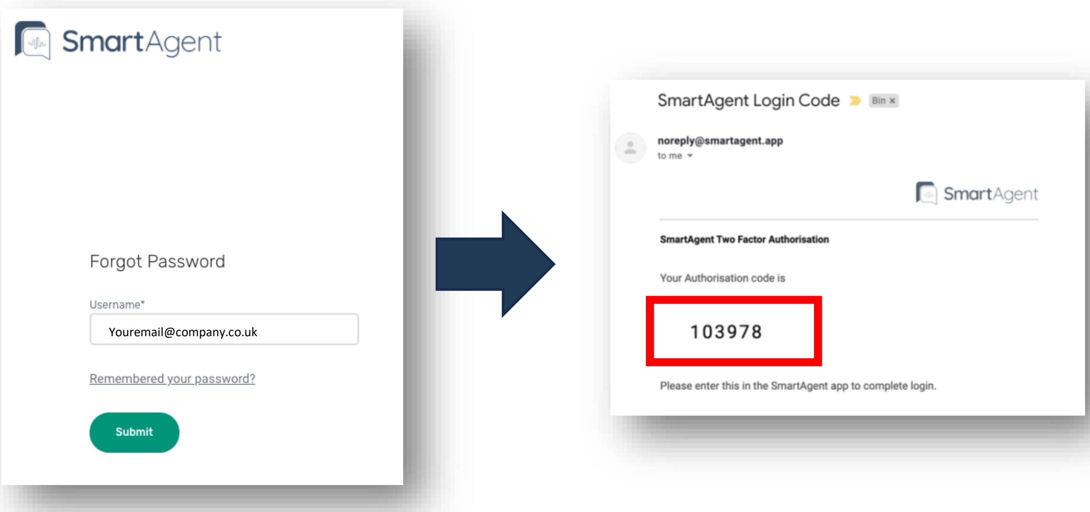
2. Input your username (this will usually be your company email address and may be case sensitive)

3. If you have been given a Password enter this in the password field, if not you'll need to reset your password. To do this click on the "Don't remember your password?" link

4. Click on "login" if you have a password.

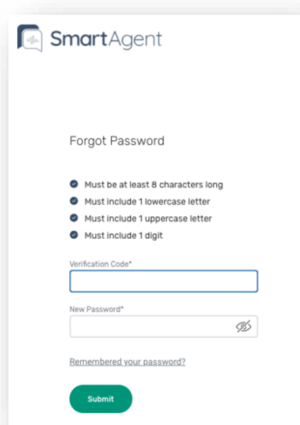
Resetting a Password

1. You may be prompted to change a password on the first login or if you select the "don't remember your password" link



2. Enter your username and click "Submit" – you will then either be sent an email or a text message with a verification code.

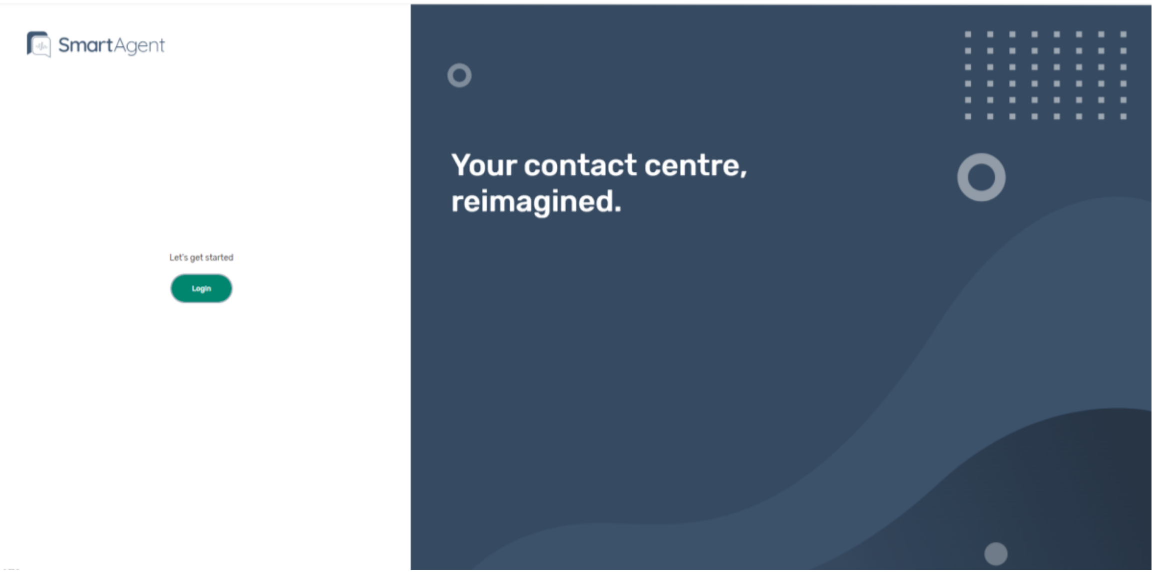
3. Enter the verification code and input a new password, following the onscreen guidance for the correct format of password.



Logging in to SmartAgent using Single sign-on

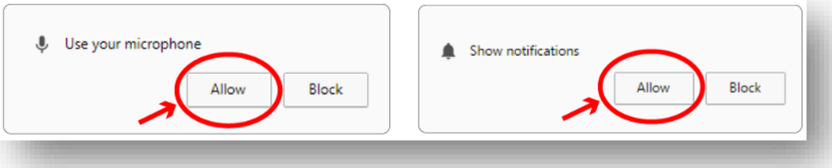
1. Once you have logged into your company platform, open the SmartAgent application in your Google Chrome or Microsoft Edge browser.

2. You will be presented with the main SmartAgent log in screen. Click Login and the screen will then Authenticate your credentials.



Notification & Cookies

The first time you login to SmartAgent you will get a couple of pop-up notifications, requesting access to your Microphone and permission to send you notifications.



You should allow both of these pop ups.

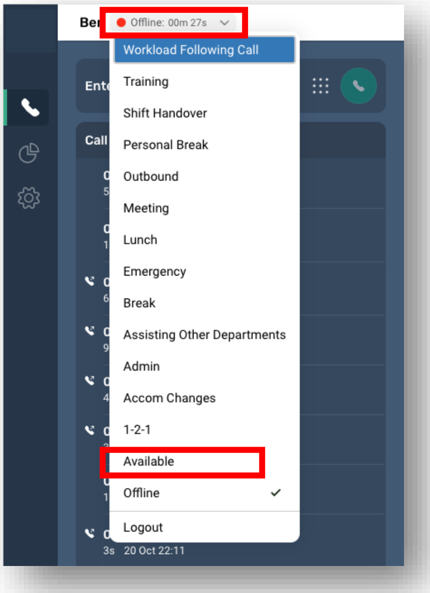
You will also need to ensure that Third-party cookies have been enabled for your SmartAgent web address. This will normally be completed by your system admins.

Taking contacts – Setting your status

Once you have logged in to SmartAgent you are presented with a split panel screen

- The left-hand side is your work panel where a contact is handled
- The right-hand side handles other key information and plugins.

You will notice that you are set to **Offline** by default and will only start receiving contacts when you set your status to **Available**.



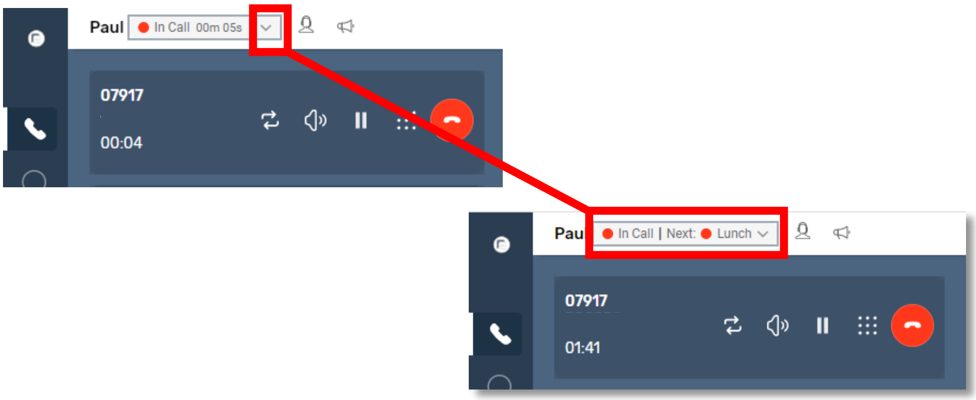
Setting your status to "Available" allows queued contacts to reach you.

Any other status means you will not receive contacts. You may make outbound contacts from any status if this has been enabled in your access level.

Your supervisor will explain which status codes to use, and when.

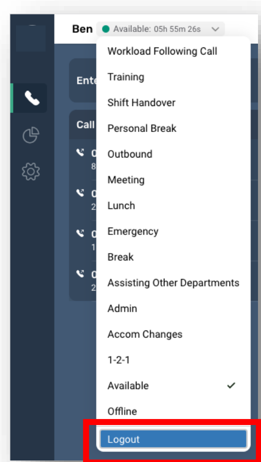
What to do for breaks & lunch – setting your next status

If you are approaching a scheduled break or end of your shift and are still on a call you can go to the status dropdown box and select the appropriate “Next” status from those that appear in the dropdown box.



This will then show your current status as “In call” but your Next status as the one you selected.

When this call ends, you will go into your normal After Call Work screen to complete any post call admin, but when you select the “finish wrap up” option you will immediately be placed in your chosen next status with no further calls coming through.



At the end of your Shift

Please remember to “log out” of SmartAgent at the end of your shift.

Unless otherwise advised by your Supervisor you should not log out of SmartAgent for any other reason than your shift has ended.

Please do not close your browser window without first logging out.

Module 2: Contact Navigation

By the end of this module, you will be able to:

- Answer an inbound voice call
- Understanding Tags / Whispers
- Holding, resuming & muting a call
- Transferring a call – warm transfer
- Using Quick Connects
- Making an outbound call
- Understanding After Contact Work
- Viewing your call history

Answering an inbound voice call

Inbound calls are distributed to you based on your Routing Profile which has been defined by your Supervisor.

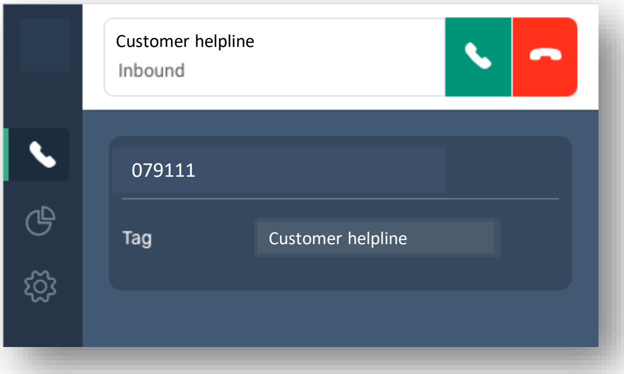
Calls are queued in the order they are received, and you will be offered the next call in the queue as soon as your status is set to "Available".

When a new call arrives, SmartAgent:

- Changes your status to Inbound Call
- Displays the caller's number & call information in the header

There are two call answering options, and your supervisor will have chosen which option applies to you:

1. Manual-answer. You will need to click the green button to answer a call.
2. Auto-answer: This means a contact will be accepted automatically.

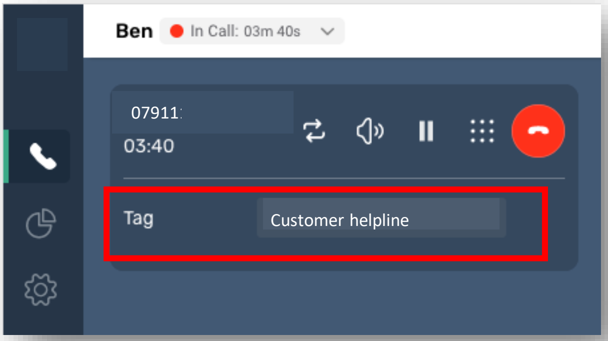


When a call is answered, SmartAgent:

- Changes your status to In Call
- Starts & displays the Call Timer
- Displays the in-call controls

Understanding tags & whispers
Tags are pieces of onscreen information that SmartAgent has identified as part of the inbound call management process.

Whispers can be an audio prompt to the customer or the agent taking the call



Tags & whispers are used for a variety of reasons and have been agreed with your system administrators. These can include:

- The queue that the call has arrived into
- The reason for the call / option selected by the caller
- A call that relates to a particular department or brand in your company
- Other relevant information that has been identified

The tags and whispers are designed to give you more detailed information about a call type, or the caller.

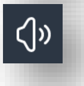
Holding, Resuming & Muting a call

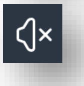
You may need to place a call on hold for a short period of time. If you place a caller on hold they will hear music/messaging for the duration of the hold period.

These buttons will appear against the caller, and will be repeated if you transfer and speak to another department.

To place a call on hold, click the on the Pause button 

To resume the call again, click on the Play button 

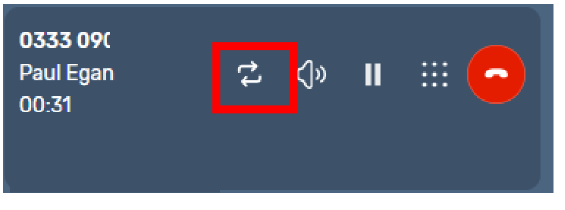
To mute the call, click on the Mute icon 

To unmute the call, click the Mute button again 

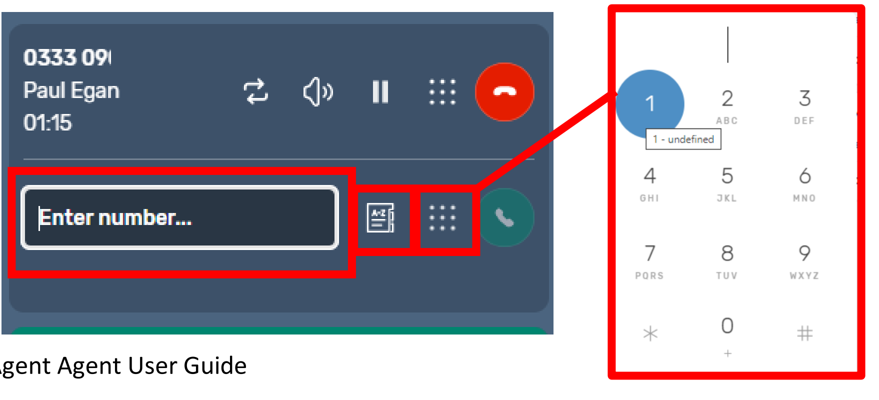
Transferring a call

If you need to transfer a call to somebody else in your Contact Centre (e.g. another agent, a queue, or a supervisor), transferring is very simple. **If your organization has enabled Multi-party calling then transfers will work slightly differently, and you should go to that section for guidance on transfers.**

In SmartAgent as standard you can also remain active in a merged/transferred call to allow 3-way conferencing. Click the Start Transfer button, this will put the existing call on hold and launch the Call Transfer module.

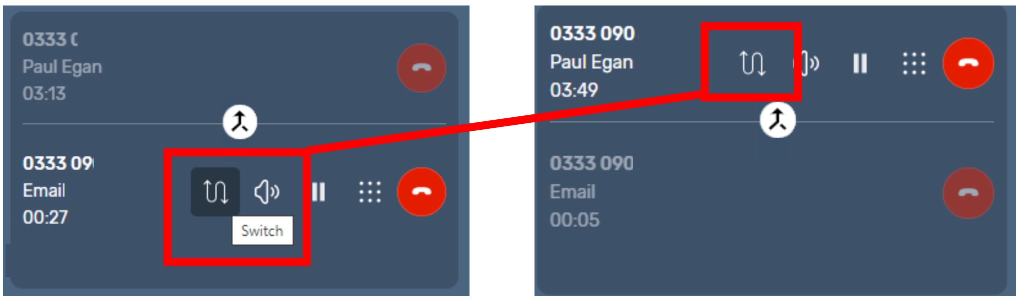


You can enter a number manually using the text entry field or the numberpad option or Quick Connects.

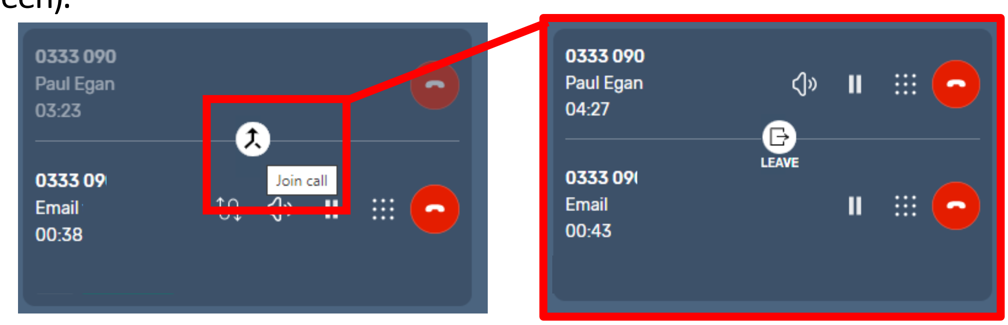


You then can speak to the person or team you want to transfer the call to, to pass on any relevant information. If at any time you need to go back to the original caller, use the “switch” icon.

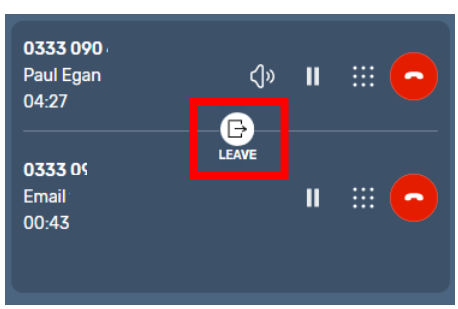
You can press these as many times as you wish to speak with just the original caller or the transferee. The person who is active will be highlighted.



If you want everyone to be able to hear /speak to each other, you can select the “join call” icon and then everyone will be able to hear each other speak (all highlighted onscreen).



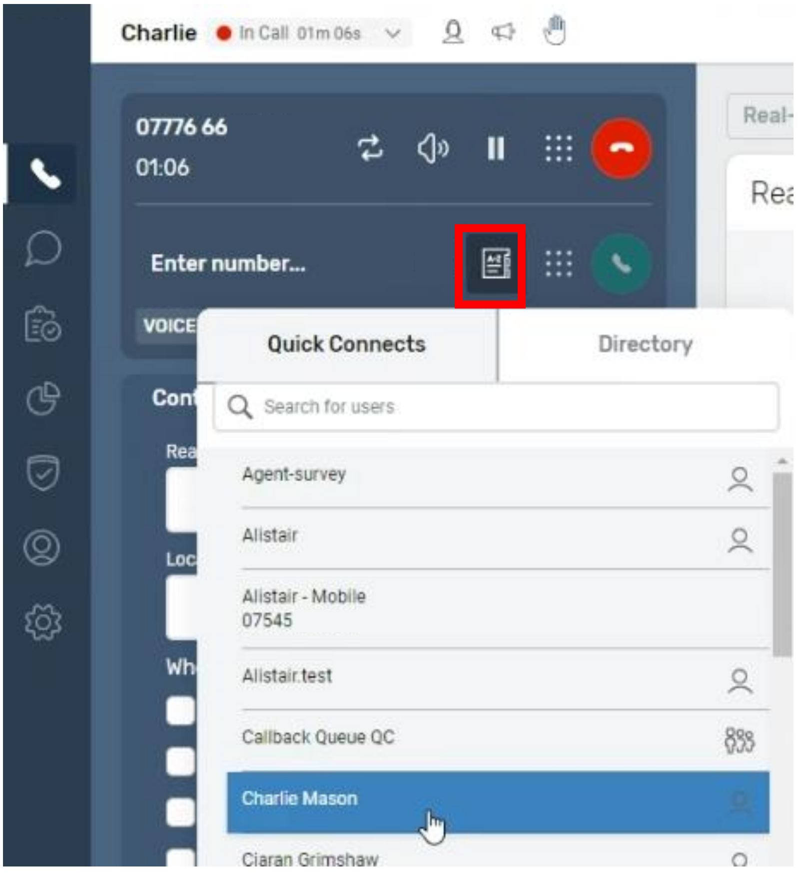
If the original agent wants to leave the call they can select the “leave” icon.



The customer will continue speaking to the person the call was transferred to and the Agent will go into After Call Work (ACW) mode.

Using Quick Connects

When transferring a call you have the option to use Quick Connects. The Quick Connects you see will be linked to the Queues you are answering, so you may see different Quick connects if your Routing profile (which queues you are answering) has changed.



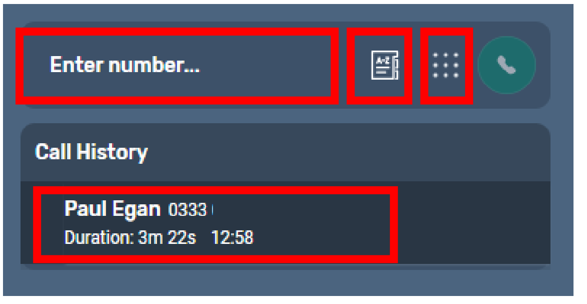
You can search using the keyword search or scroll up and down the list. Quick connects will show you if it is another Queue e.g a specialist team, an individual agent or an external number.

If you are transferring to another queue your call will be in the highest level of priority for that queue.

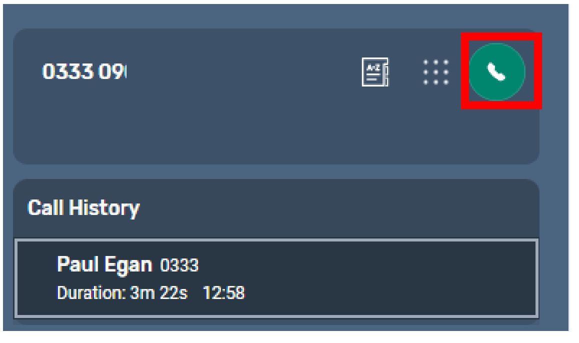
Making an outbound call

To make an outbound call from SmartAgent you can choose between:

- Typing the phone number directly in the Enter number... field
- Using the number pad
- Selecting an item in your call history list
- Selecting a Quick Connect

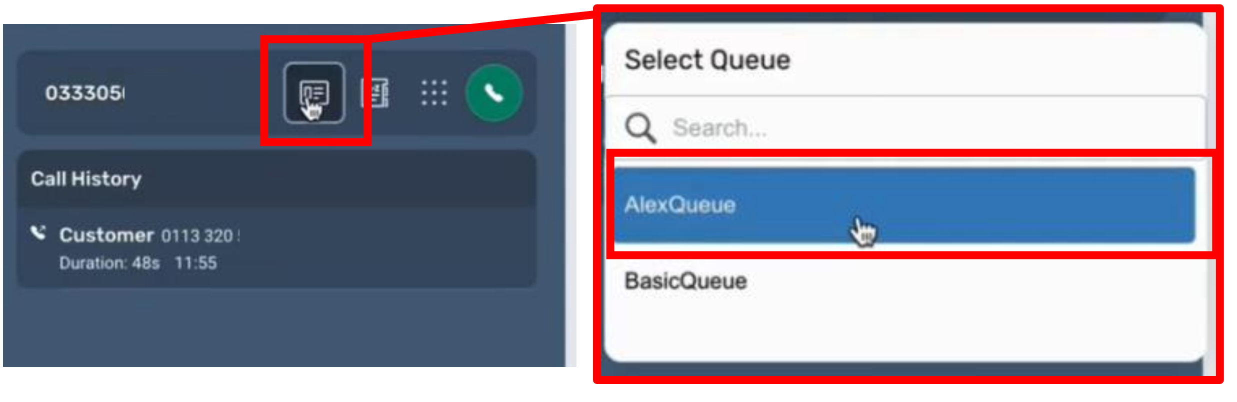


Once the number details have populated the dialler, hit the green button to dial out.



Your security profile and Routing profile will determine if you can make outbound calls. If the system doesn't allow you to make outbound calls you should contact your SmartAgent Admin.

If your Organisation has enabled the CLI Selector, you will see an additional icon next to Quick Connects, allowing you to select which queue and associated outbound caller ID you are calling out from. If no queue is selected the call will go from the default outbound queue specified in your routing profile.



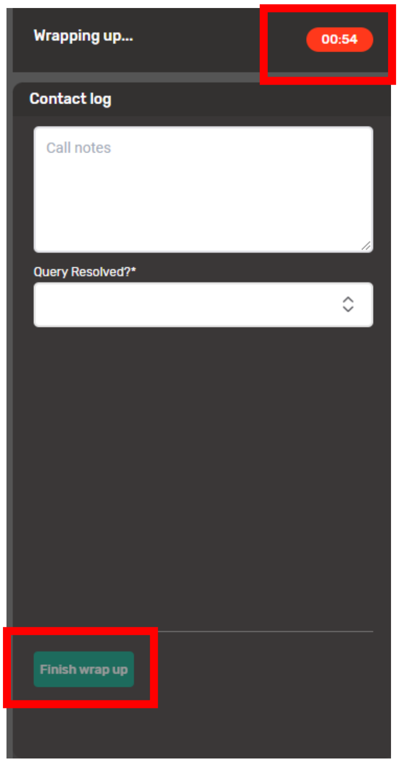
Understanding After Contact Work

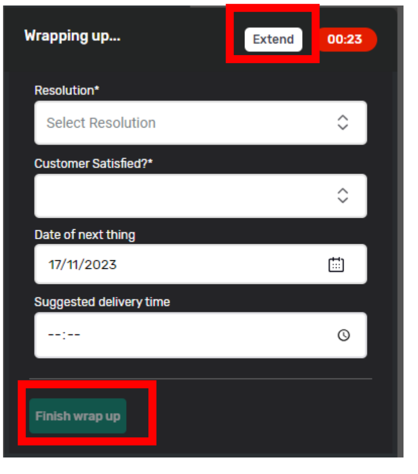
After Contact Work (ACW) is the status that all agents are automatically placed into when a call has ended. It gives you time between each contact to complete any administrative tasks that are required by your organisation.

These timings are set by your system admins who can also set whether you are given the option to extend the normal ACW timing. After Contact Work mode is easily identified as the SmartAgent Work Window screen turns grey/black.

This screen can be figured in different ways for different queues and can be amended by system admins, so you may have different options to complete depending on the contact type.

The time remaining will show in the top right of the ACW screen – if you are allowed to extend this there will be an Extend button next to it





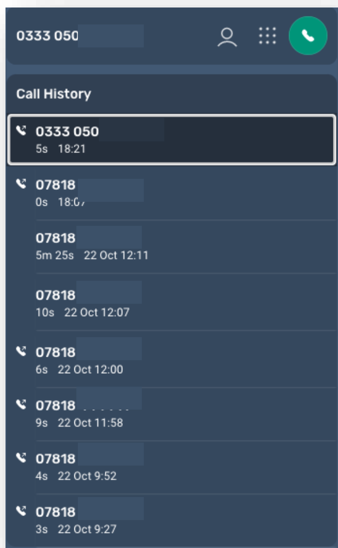
Once, you have completed your mandatory fields (marked with an *) on the contact log tasks following the call the “finish wrap up” button will be available for you to select.

Unless you have specified a “next status” you will then automatically be placed back into Available status ready to receive another contact.

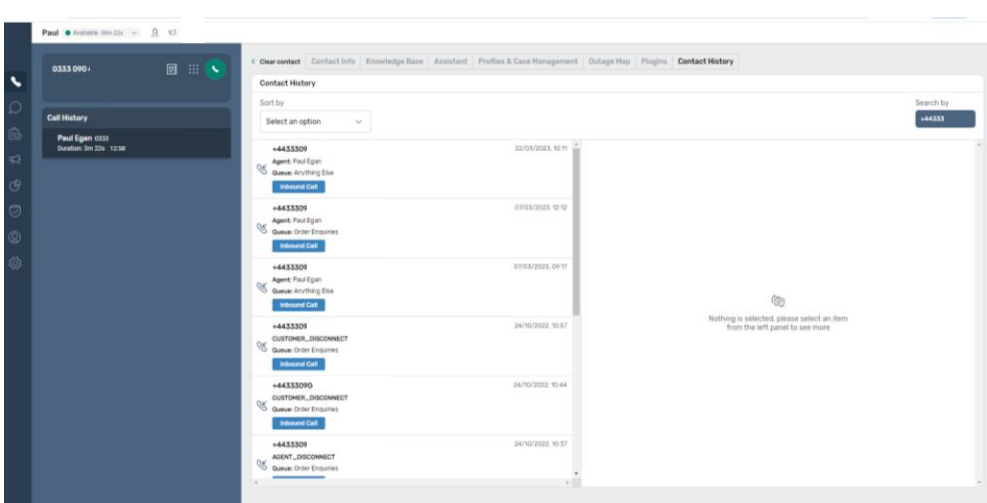
Call History and Contact History

SmartAgent keeps a record of all inbound and outbound contacts that you have been involved in and stores the details in your call history log. Outbound calls will have an arrow icon on the list.

Your call history is listed in the work panel whenever you are not in an active call. You can click on any previous call in your call history and then select the green phone icon to dial that number.



If enabled by your organization, you may also have access to a contact history of contacts made by a client. This will appear on the right hand side of the screen and you can review previous contacts made by that customer.



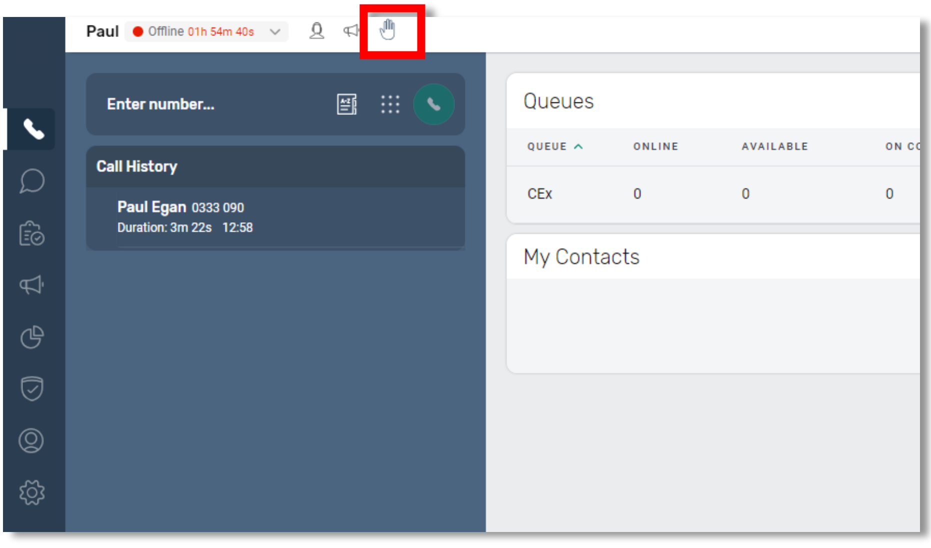
Module 3: Agent Support tools

By the end of this module, you will be able to:

- Use the “Hand Up” signal to attract attention
- View any current Announcements
- Use the Agent Directory (if enabled)
- Understand Supervisor Monitoring
- Find your QA scores on My Scores (If Enabled)

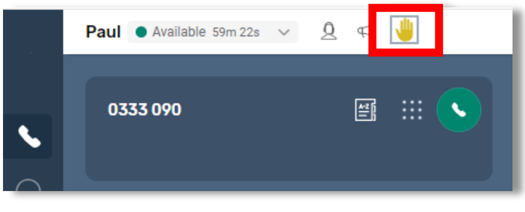
Hands Up Signal

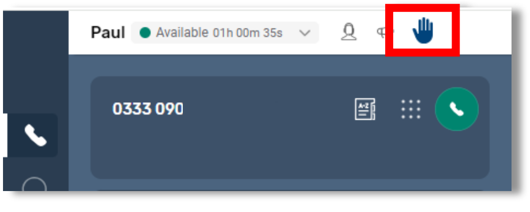
Agents can use the “Hand Up” signal if this has been enabled for your organisation.



Agents can click on the Hand logo – this will then change colour to Yellow and show as a highlight on the Real Time Data screen that supervisors have access to.

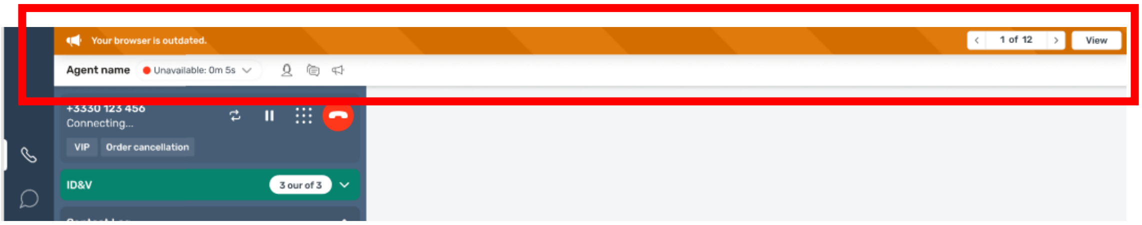
When a Supervisor Acknowledges this “hand up” the hand will change colour to Blue – showing the Agent that assistance is on the way. The Agent can clear this at any time by clicking the hand icon again.





Announcements

Periodically you may receive messages or announcements from your supervisors or admins on SmartAgent.

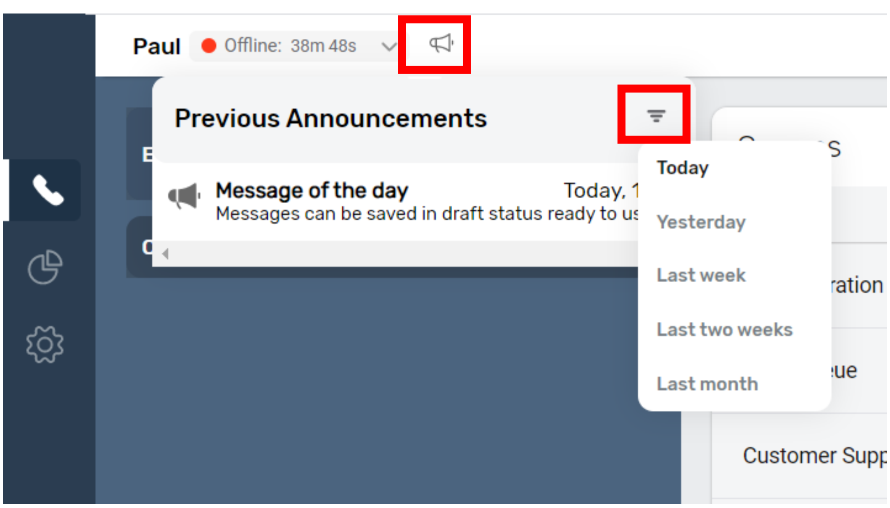


These will appear at the top of your screen. If the message is long you will need to click “View” to expand the screen to read the full message.

You will be told how many messages require reading. The “1 of 12” signifies there are 12 messages left to read. This will reduce as you read and acknowledge each message by clicking the OK button. When there are no further outstanding messages the orange banner will disappear.

You can also access older messages by clicking on the announcement button and selecting the Previous announcement option.

You can scroll down all messages or filter by a time period on the right hand side of the announcement area.

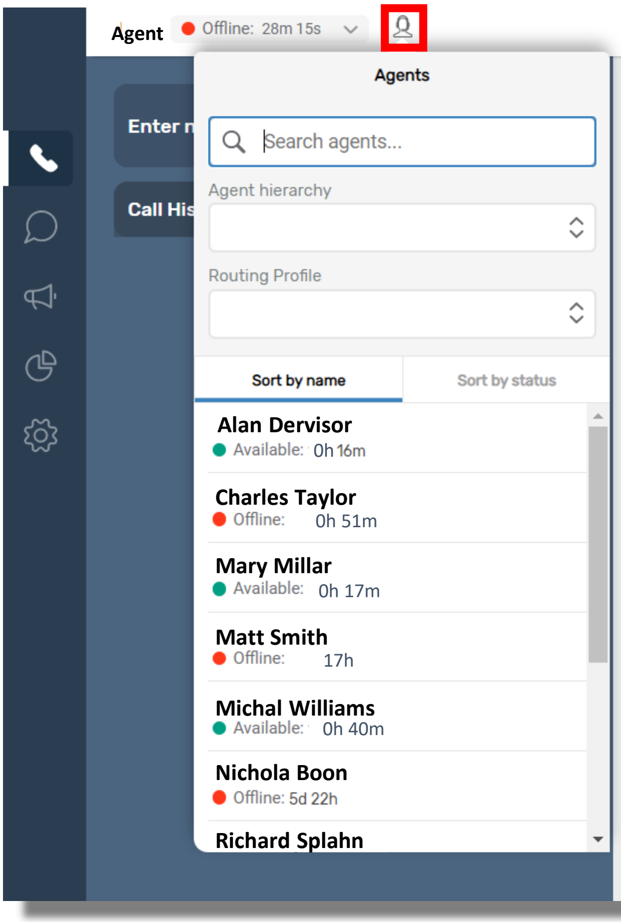


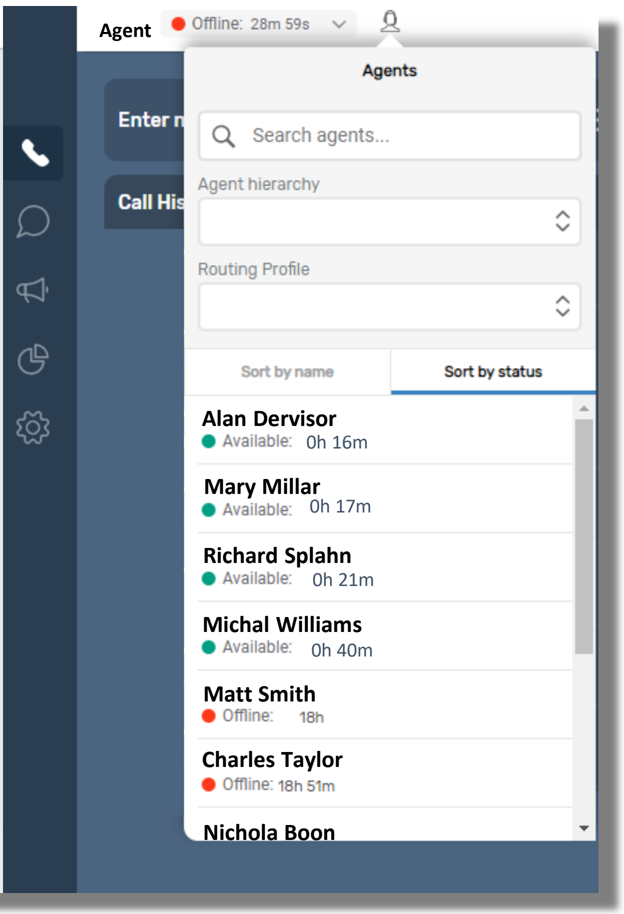
Agent Directory

The Agent Directory function, if enabled for your organization, allows agents to check the availability of colleagues, for example if they need to transfer a call through to an individual dealing with a complex query, or find someone from a specialist team to help.

The Agent search field is accessed by clicking on the highlighted icon and the agent can then search by using the search field to type in a name or search for users from a particular group setup in Agent hierarchy or routing profile.

They can also search the list of agents sorted by alphabetical name order, or by clicking on the alternate tab to search by status.





Supervisor Monitoring & Barge

Supervisors can monitor your calls remotely using the SmartAgent application. You will not be aware if a supervisor is listening into your call.

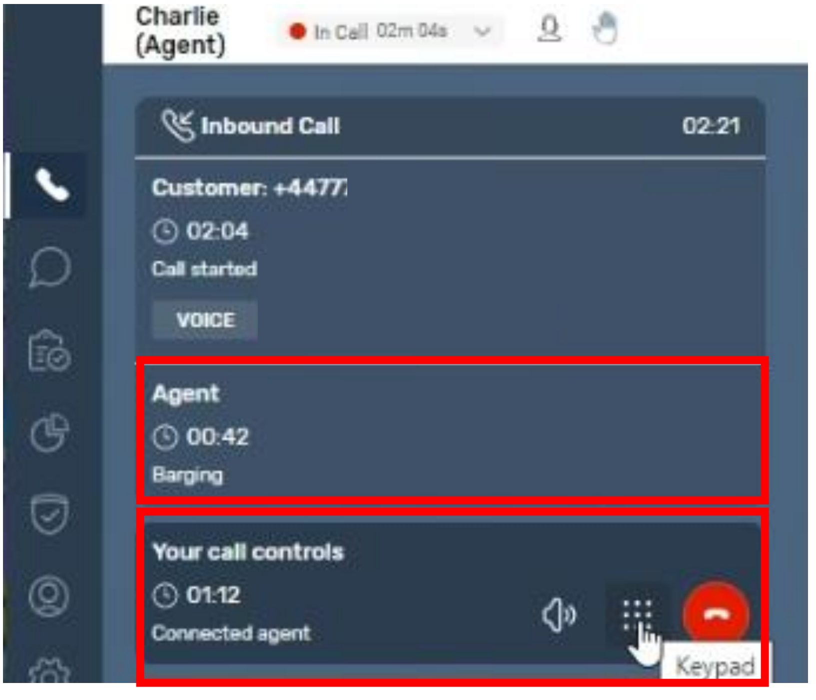
You may want to consider using the “hand Up” feature or an instant messaging service to request support from a Supervisor if you want them to listen into a call.

Supervisors may also have the option to “Barge” into the call if this has been enabled for your organisation.

They have the option to join the call and can choose to mute you as the agent, mute the customer or end your participation in the call and take over talking to the customer.

If a supervisor chooses the “Barge” option you will see another person join the call with the tag of “barging”. At this point the supervisor can speak to the customer, may choose to put you on hold, mute you or the customer and remove you from the call if required.

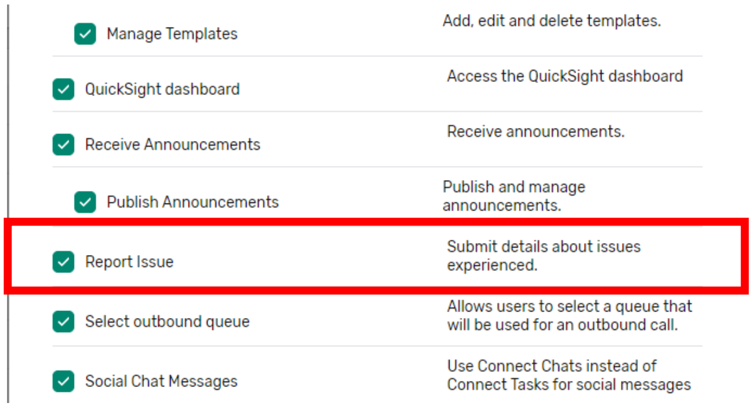
Your call controls may be limited to the ability to mute yourself or leave the call. You will not have the ability to affect customer call.



Report an Issue

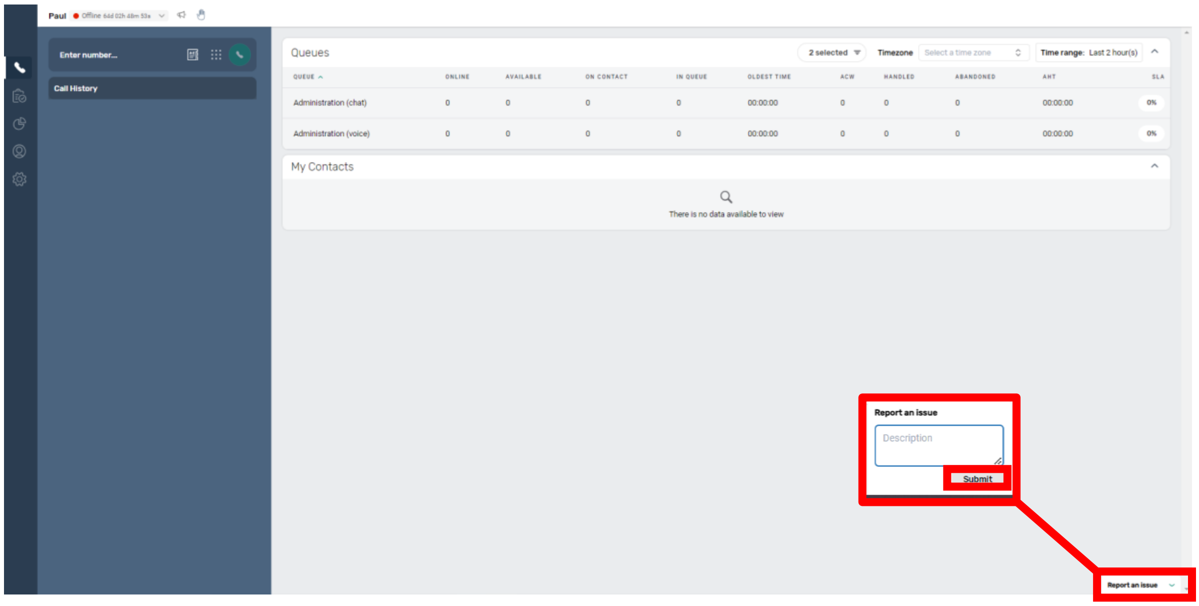
Agents can use the “Report an Issue” function if they are experiencing difficulties on a call with regards to clarity / call quality.

This feature needs to have been enabled by system admins in the “permissions” settings for “Agent” security profile.



Once enabled, at the bottom of an Agent’s screen will be a “report an issue” button. The agent can enter any relevant text and submit to add a record of the issue to your companies S3 data.

Any reported issues will then added to the *prod-sa-company-reported-issues* S3 Bucket under your company AWS account for further investigation.

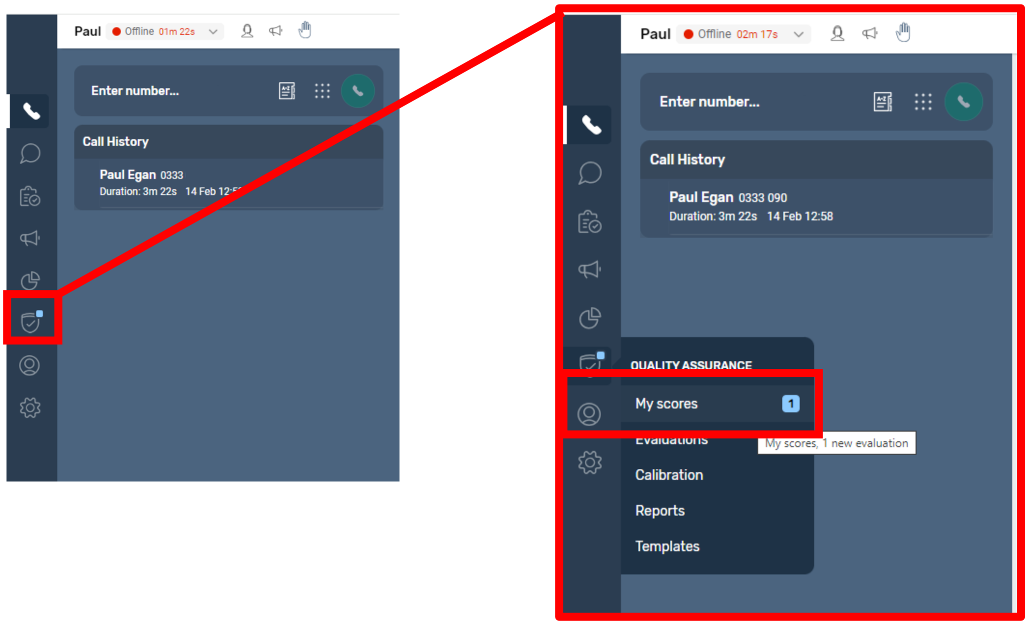


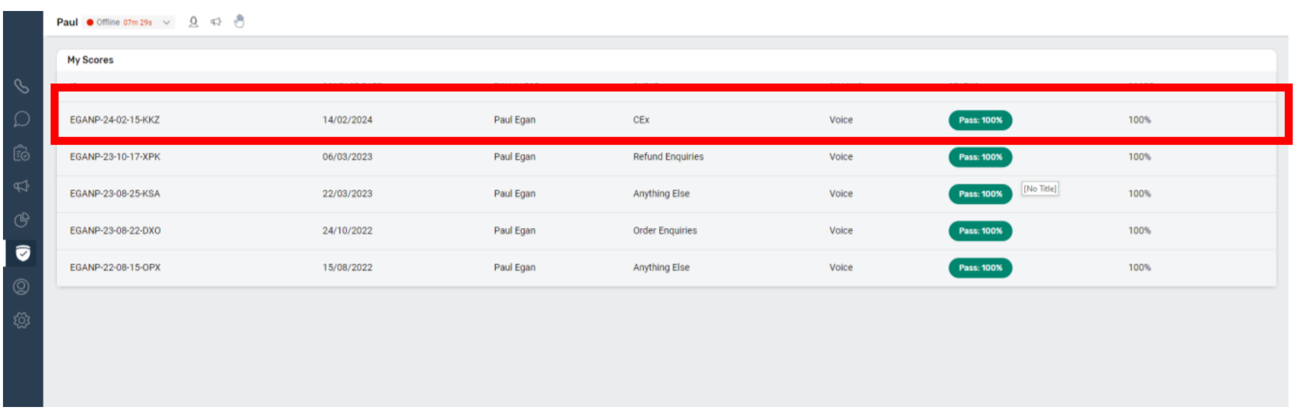
My Scores (If QA module enabled)

If your organization has the QA module enabled Supervisors can listen to current or old calls and utilize an onscreen call monitoring or QA form.

If they have reviewed and scored one of your calls you will see a notification marker in your side menu. If you go to the QA menu and select "My Scores" you will then see a list of all your scored calls. New ones will be highlighted.

If you click on a call you will then be taken to the completed form to read any feedback on how you handled the contact.





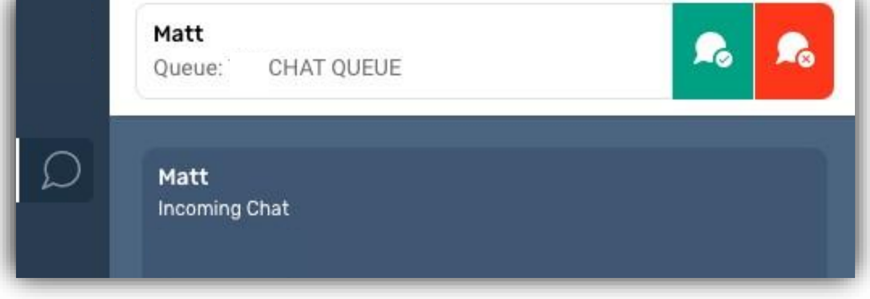
Module 4: Other Channel & Special Contacts

By the end of this module, you will be able to:

- Answer Chat / Webforms/ Social /email contacts
- Toggling between multiple chats
- Use Quick replies to speed up customer servicing
- Message Formatting and attachments
- Further Email options – CC'd address forwarding etc
- Multi-party calling (if enabled)

Answering an inbound Webchat / social media chat /email contact
If your organization has enabled webchat, social media chat,webforms or email contacts and these channels have been added to your Routing profile, then you will receive these chats when you put yourself in "Available" status.

These contacts will come through in a similar way to your voice contacts, but with different logos and descriptions based on the particular method of sending the message. As with voice calls these chats can be presented automatically or you may be given the option to manually accept or reject a chat.



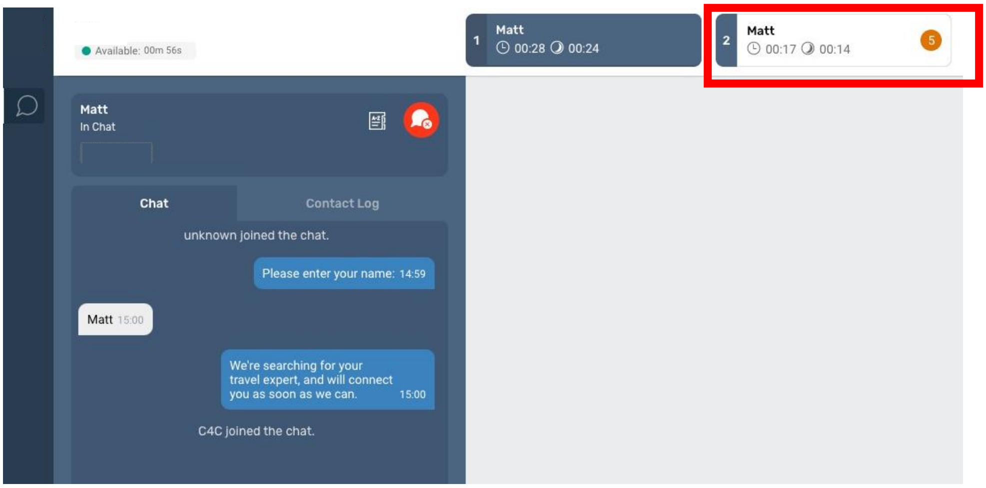
Toggling between multiple chats

Unlike voice where you only handle one contact at a time, with various forms of chat there is the option to support multiple different chats at the same time.

Your organization will set the limit for how many chats take place at the same time. This can be between 1 and 10 slots being used at a time. Additional chats will appear at the top of the screen.

The timing clock on the left of the tab is the total time of the chat interaction. If there is an additional time to the right, this is the time since the last interaction by the Agent or the Customer.

If configured, you may also see onscreen colour prompts highlighting that there is a need for a response in the other chat tab.



When a chat comes through you can scroll up or down to see the messages from that customer.

Depending on how that particular channel has been configured this may be restricted to messages in that chat session between the customer and a chatbot, or it may also include previous messages from other agents in previous chat sessions.

When you set your next status to a “break” the system will stop adding new chats to you. You will need to clear any remaining chat slots that are active and once you have finished wrap up on ACW mode on the last chat you will go into your requested nect status.

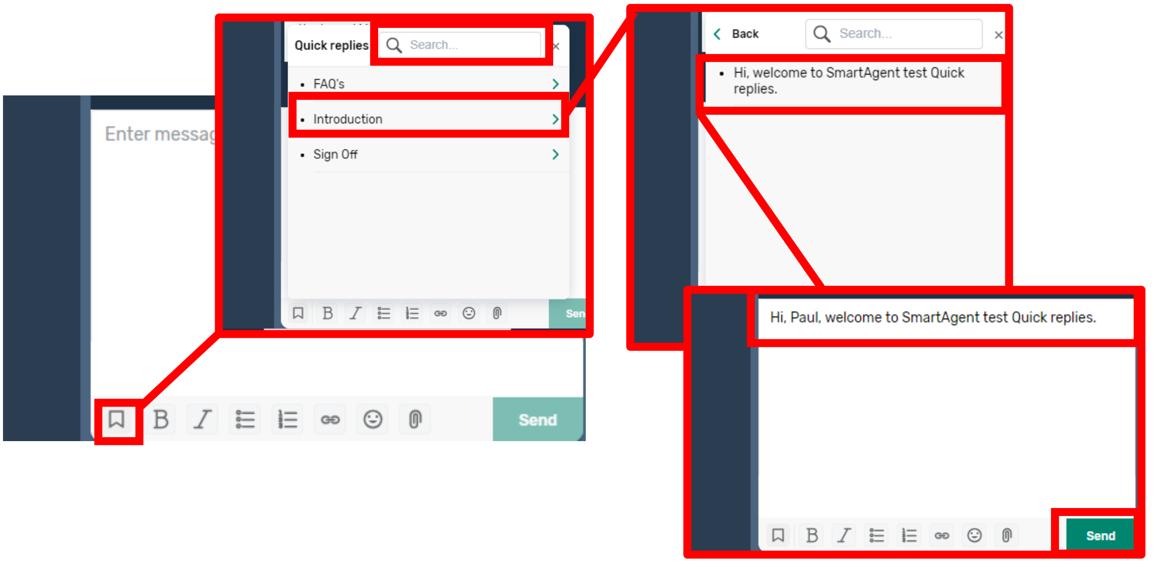
Using Quick replies

Quick replies are pre-configured responses that your organization will have created to speed up the process of answering customer queries. The structure and organization of these quick replies can be managed by your system admins.

When responding to any type of chat, at the bottom of the text input field, you have the “Quick replies” icon. If you select this you can either manually search using keywords or use the folder / organization structure setup by your organization.

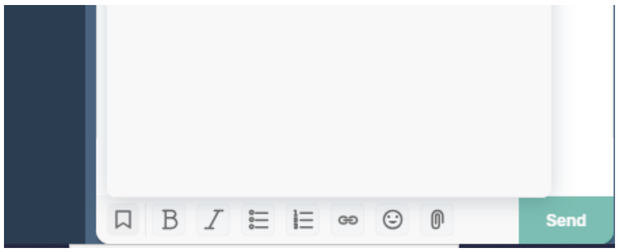
A green arrow indicates there are further levels / further messages available. When you see no green arrows then that is all messages in that particular branch or folder.

If you select a message this will then appear in your text input field, where you can apply any further details as required before hitting “Send” to pass this information onto your contact.



Message formatting & attachments

When creating any response in webchat, social chat or email you may have the opportunity to use different formatting and attachment options depending on your access level and what has been configured by your organisation.



Quick Replies – These can be searched or use folder structure to find pre-prepared responses.

Bold – any highlighted text will be formatted as **Bold**

Italic – Any highlighted text will be formatted as *Italic*

Bullet points - Any highlighted text will be formatted with bullet points

Numeric list - Any highlighted text will be formatted as a numerical list

Hyperlink- insert / mark text as a hyperlink

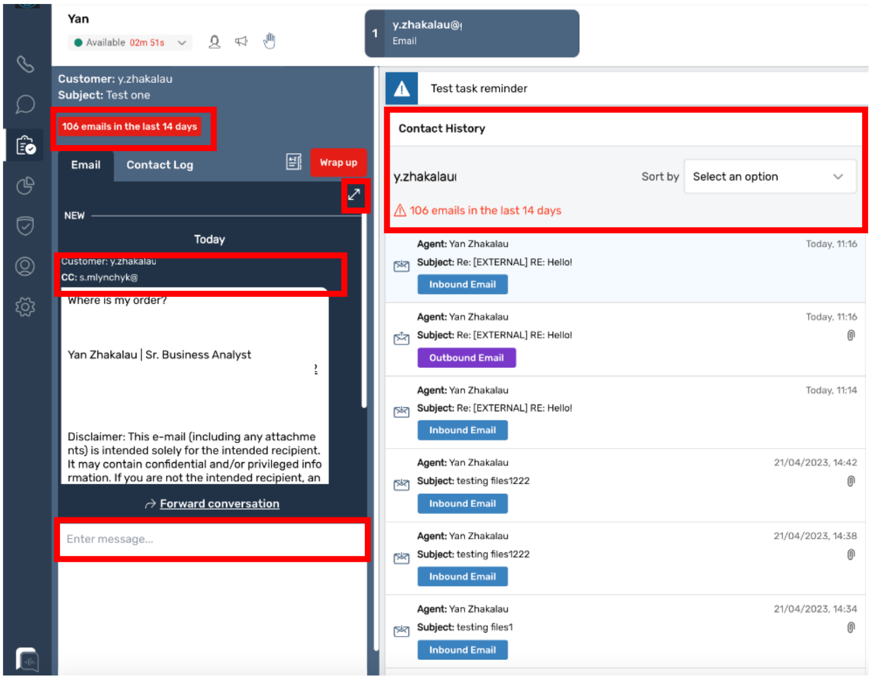
Emoticon- pick from an approved list of emojis

Attachments- Your access level will determine if you are allowed to attach documents to a message. This can be restricted to particular file formats or only for particular activities.

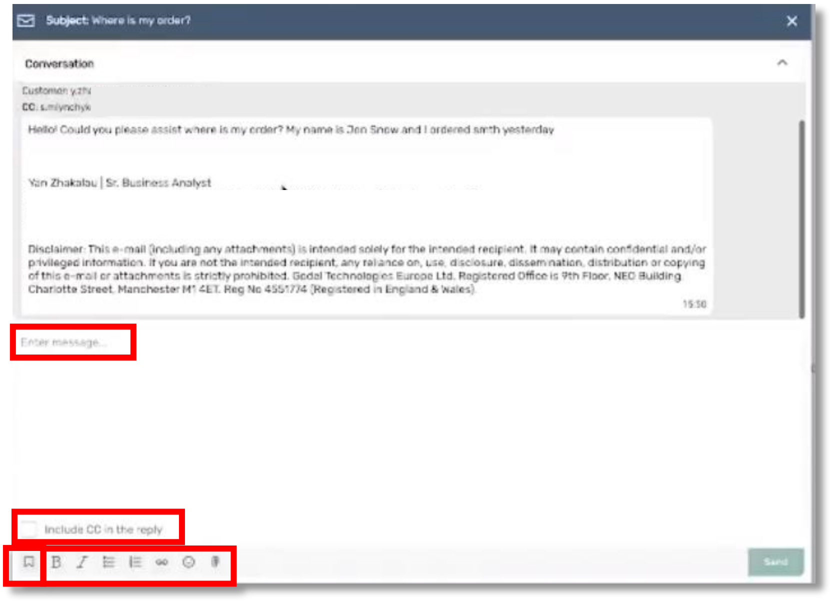
If you send multiple attachments these will be listed individually in your chat screen but will be grouped together for the customer eg all appear on one email.

Email additional functionality

When responding to an email contact you may receive onscreen prompts if a customer has been in regular contact within a set period and you may also be able to access the contact history from that email address if that feature has been enabled for your organisation.



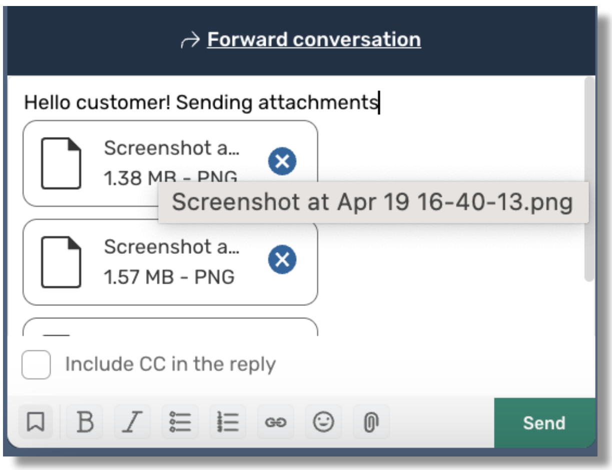
You can click into the email address field to review who has been CC'd into the email and can use the diagonal arrow in the top right to open the email into a larger window to see the whole email while writing your response.



Within this view, just as in the normal chat view you can click on the Quick reply button on the bottom left to access any of your organisations Quick Replies. You can also select the button to include the CC'd email addresses in your response.

You also have access to a range of formatting options, emoticons, and attachments if these have been enabled for you to use.

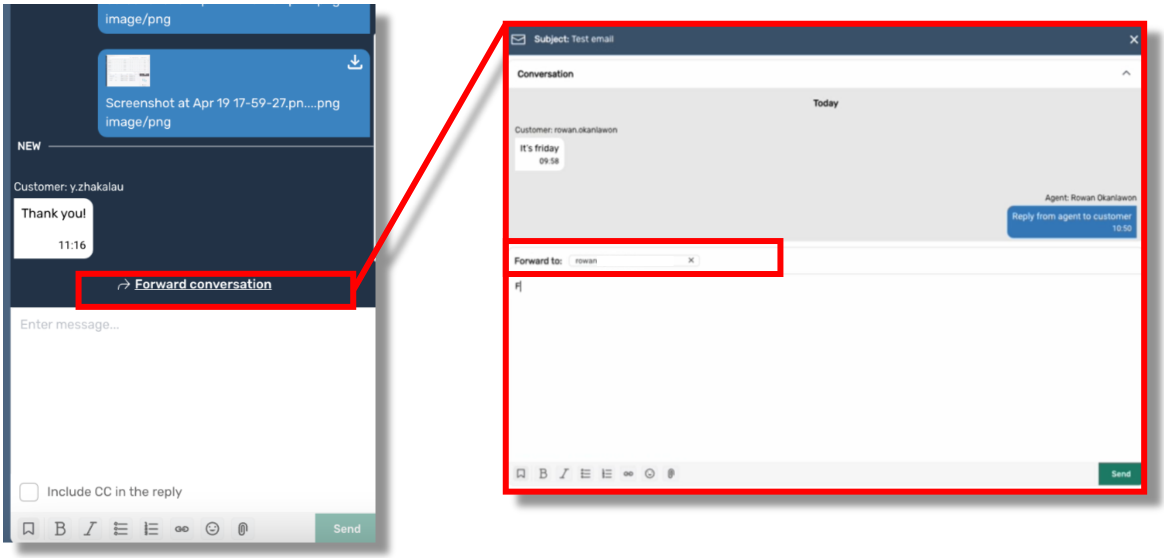
If you select the add attachment icon you will need to browse your files to find the attachment and select it. These attachments will then be viewable in the chat message, for you to check before sending your message. If you hover your mouse over the file icon you will be shown the full file details to ensure you are sending the correct attachment.



Once sent, each attachment will appear as a separate item within the chat window with a matching icon , based on the file type, but the addressee will receive one email with multiple attachments.

Forwarding an email conversation

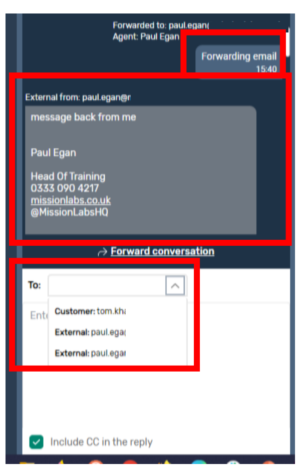
If you have the Forwarding email feature enabled in email, an Agent will have the option to forward an ongoing email conversation to a specified email address.



In order to do this, select the "Forward email Conversation" link and a new screen appears where they can review the email conversation.

The Agent then inputs an email address in the "forward to" field. They can add a message to the forwarded person, if required, before hitting the send button to forward the email to that person.

If the person who the mail has been forwarded to responds to the email, this message is placed back into the Queue marked as coming from an external source.



The Agent can then choose to converse with the forwardee or the customer by selecting their email address in the dropdown field as required.

Response back to same agent

If your organisation has the threaded response feature enabled in email, if a customer responds to the email straight away, or within an agreed period, the email response will be presented to the agent as a "new" interaction within the email chat, just like a webchat interaction.

The Agent will get an onscreen notification of a new element in the chat and the response from the customer.

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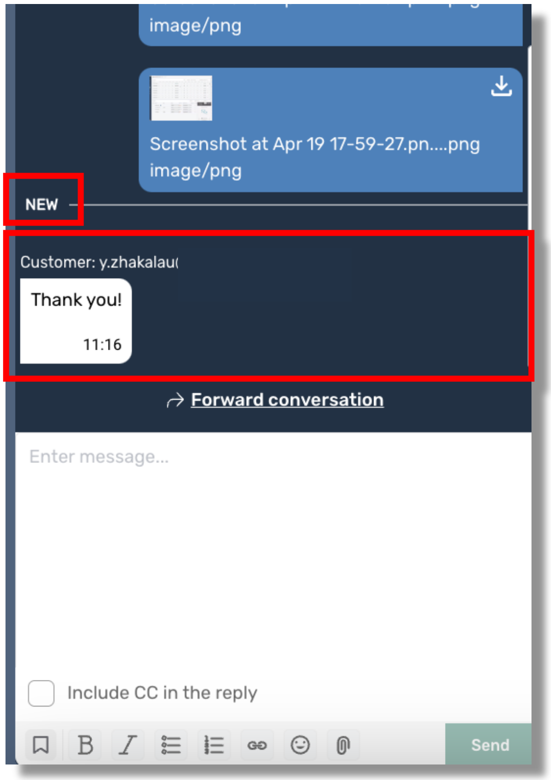
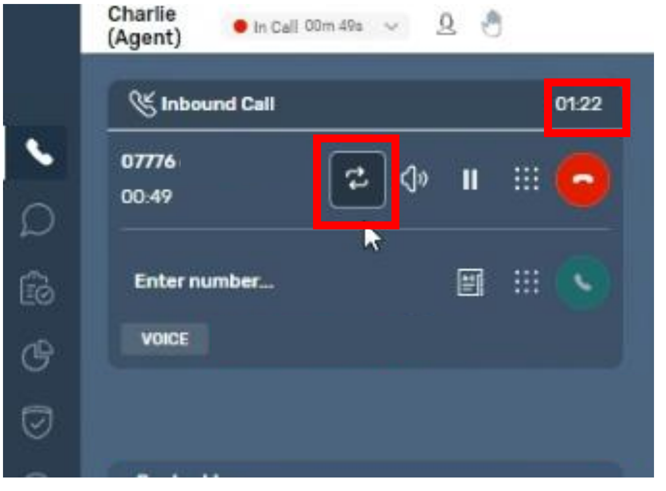


If the response comes outside of the agreed time parameters, the response will be presented to the next available agent, however the agent will be able to see the previous discussion and email conversation and pick up the conversation thread.

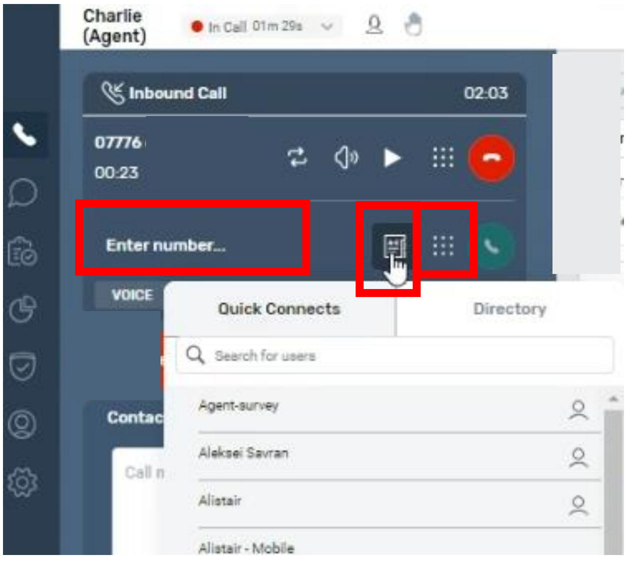
Multi-Party Calling
If your organisation uses enhanced monitoring and has enabled Multi-Party Calling, how you transfer calls will change slightly – allowing you to have up to 6 people involved in one call.

If an Agent wants to transfer a call to specialist team they will select the Transfer Icon from the dialler area.

The "Inbound call" time displayed will show how long the customer has been on the call. Other timings shown will highlight how long a person on the call has been in their particular state, e.g. on hold etc.

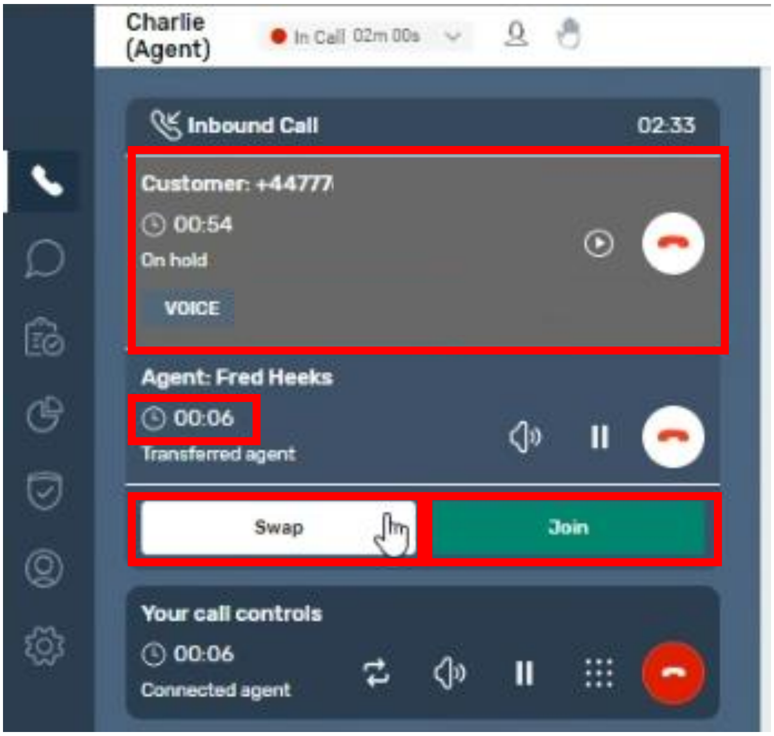


The Agent can then use either the external number, keypad or "Quick Connects button" to select who they are transferring a call through to.



Multi Party Calling (continued)

At this point the customer will be put on hold (shown on-screen as being greyed out) while the Agent can talk to the other person to prepare them for the transfer.



The Agent can then use the swap button to move between talking to the customer and the specialist team / Agent.

As they press "Swap" the other party will be put on hold and be greyed out.

If the agent wants to mute their own microphone or put themselves on hold then they would do this in the "Your call controls" section

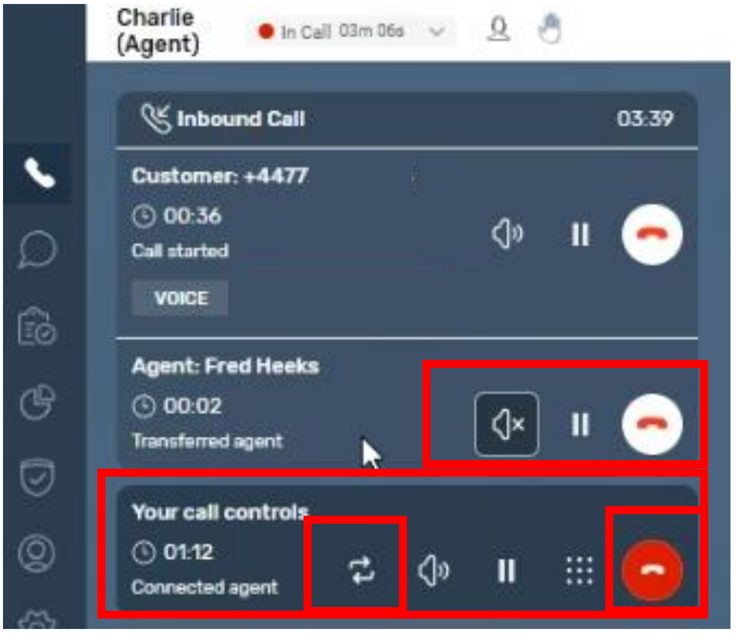
If they want to speak to all parties at the same time they can press the "Join" button. All parties will be taken off hold and can hear/speak to each other.

Multi-Party Calling (continued)

While connected in a multi-party call Agents will have the ability to mute a participant or put them on hold using the control icons for that party on the call.

When the Agent has completed the transfer and wishes to leave the call, they should select the red “end call” button in “Your call controls”.

This will leave the customer speaking to the transferred person or department and put the agent into After-Call Work mode.

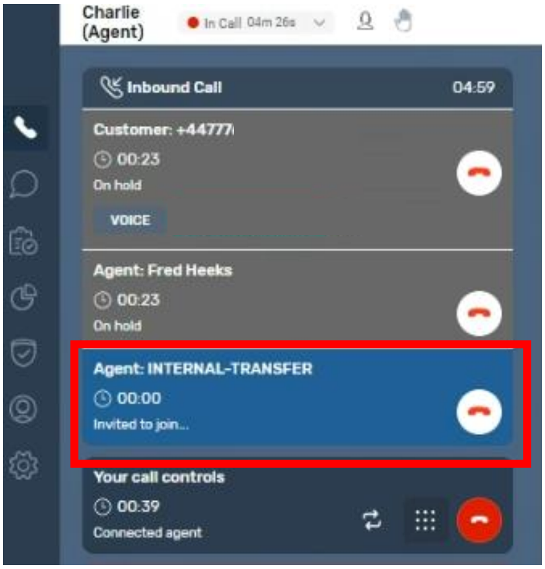


There is also a further option which is to add another person to the call by using the “Transfer” button again.

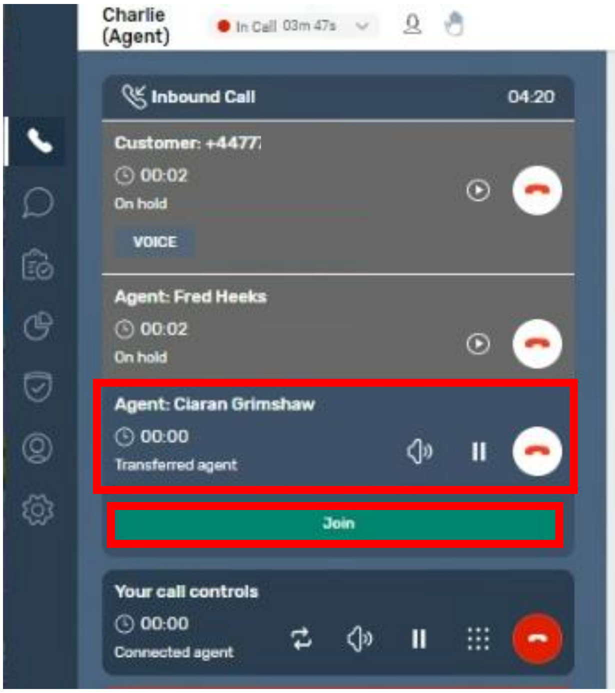
If the agent elects this they will again be given the option to key in an external number or use the Quick connect listing as before to invite the other person to join the multi-party call.

Multi Party Calling (continued)

This will immediately place the other parties on hold while the agent initiates contact with an additional person using the same manual/keypad entry or selecting from Quick Connects. The agent may see a brief message on-screen while this additional connection is made and answered.



Once connected they will have an opportunity to speak to the new attendee while the other parties remain on hold. Once a conference call contains more than 3 parties you will not have a "swap button" but can manually place any parties on hold /restore as necessary.



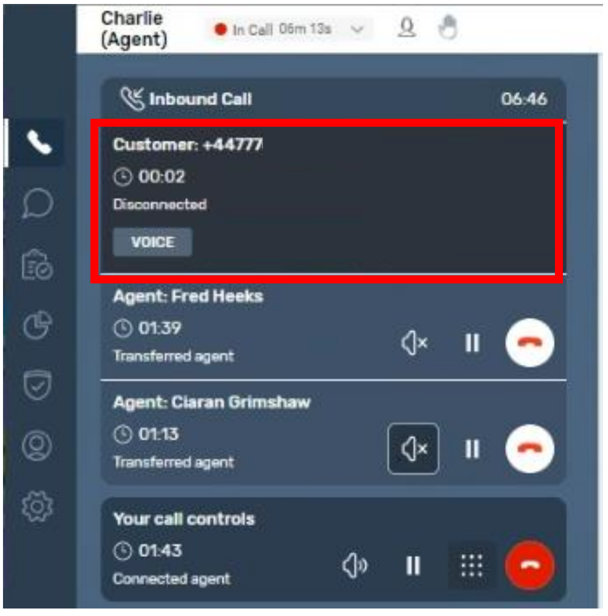
Multi Party Calling (continued)

If the new attendee is ready to join the call the agent can select the “Join” Button to allow everyone to speak / hear each other again.

Other parties on the call using SmartAgent will be able to put attendees on hold or mute them.

If a participant is no longer needed, they can leave by pressing the red “end call” icon from against their details or someone else can remove them from the call using the red “end call” icon next to their details and other participants will remain on the call.

If the customer ends the call then their status will change to “disconnected” and show onscreen in a dark grey colour.



Other remaining parties will remain in a conference call and would need to select the “end call” icon to end the multi-party call.

It should be noted that any conversation after the customer has disconnected will remain part of the CTR record of that customer call.

So in the event of a customer requesting a copy of a call it will include this part of the call after disconnection.