NICE inContact

Softphone MAX

Servicing

Where Prime Lending Ends Citadel Servicing Begins
The Leader in Non-Prime Residential Lending

NICE inContact – Softphone MAX 0817v1

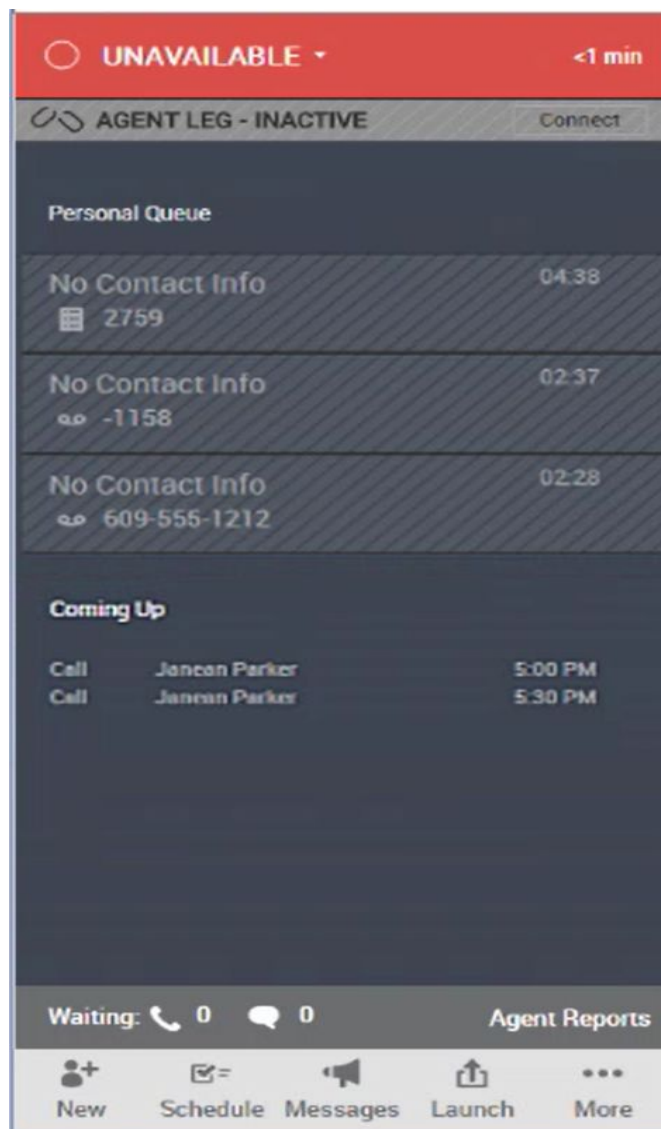**Launch Agent:**

MAX will launch by default. Set the same number (username) in MAX. Select
Integrated Softphone, click continue.
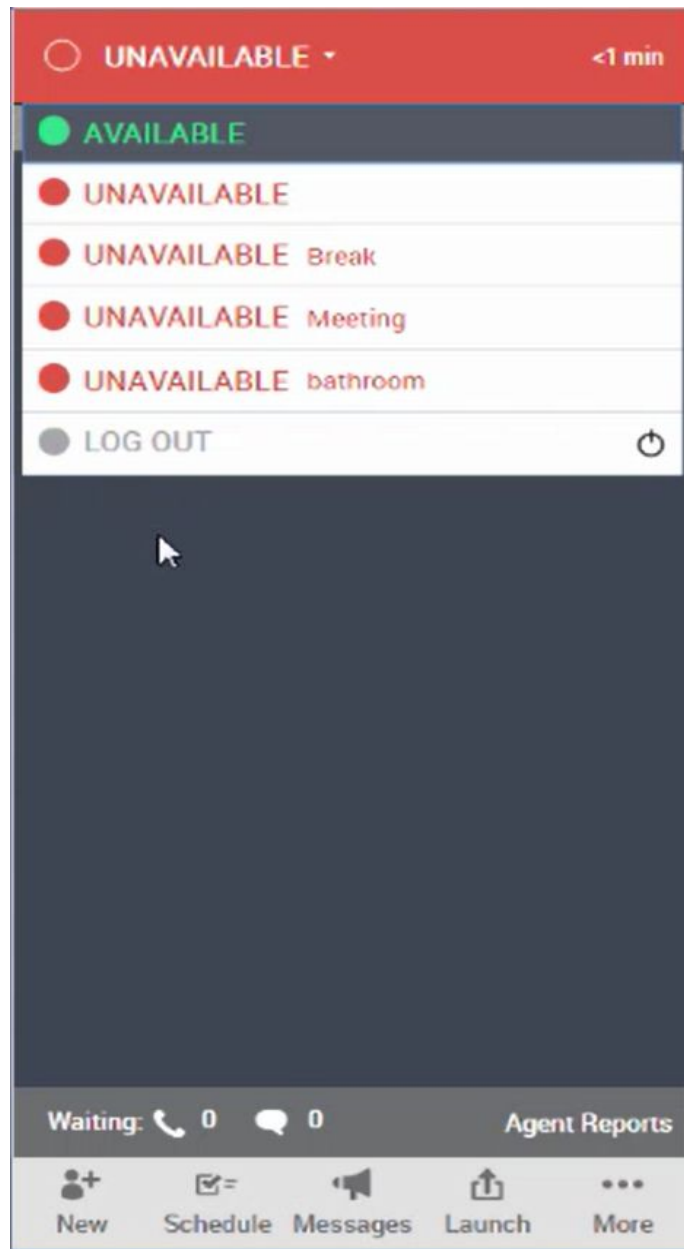
Agent State:

Agent sets their working state or logging out of the system

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Personal Queue: Contact sent to agent, including transfers

Coming Up: reflect the days upcoming events

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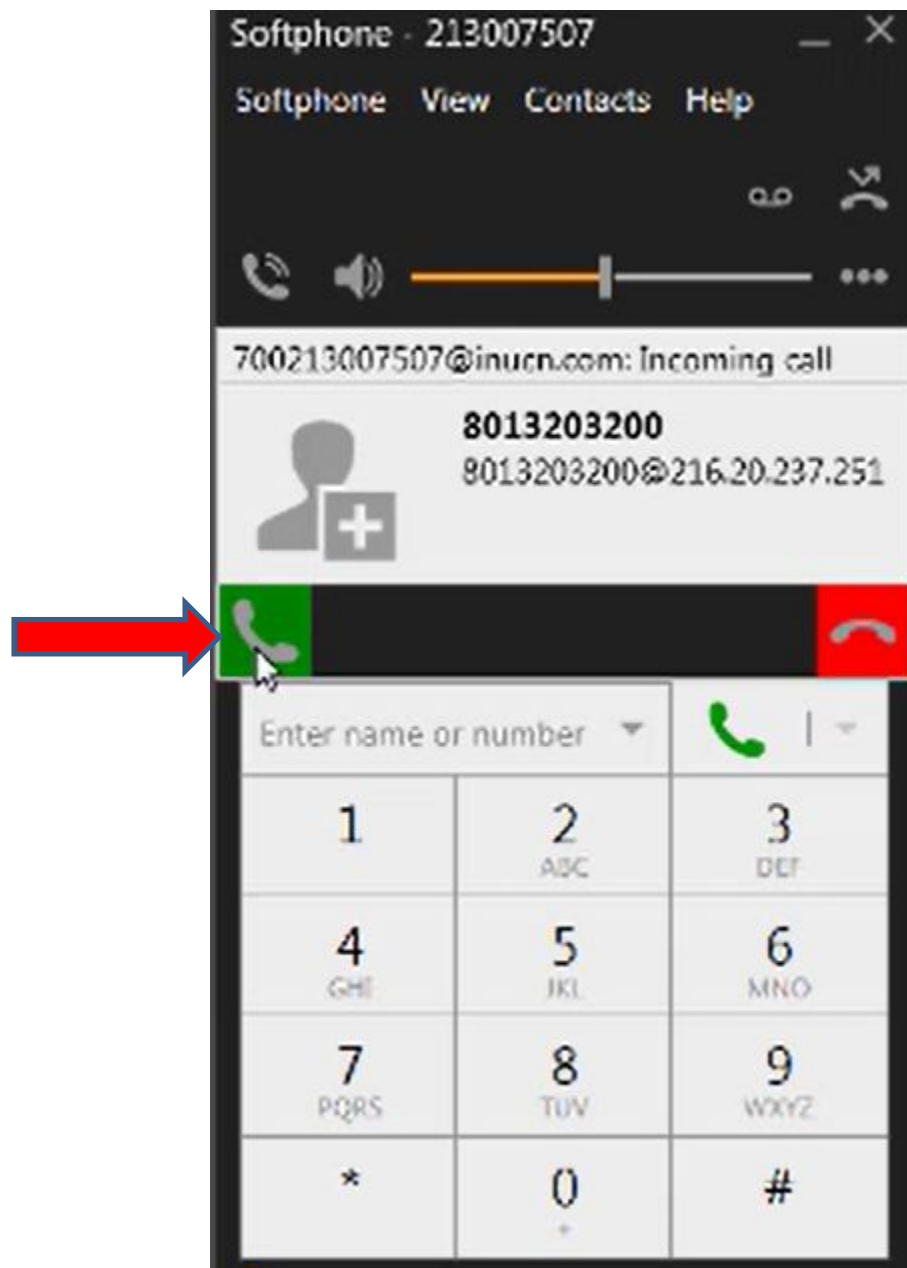
Inbound Call:

Agent will have to press the green button to answer call. Once call is answered it moves into the MAX interface. Softphone interface box can be minimized while on call. To end call, agent will need to hang up call in MAX (see page #11).
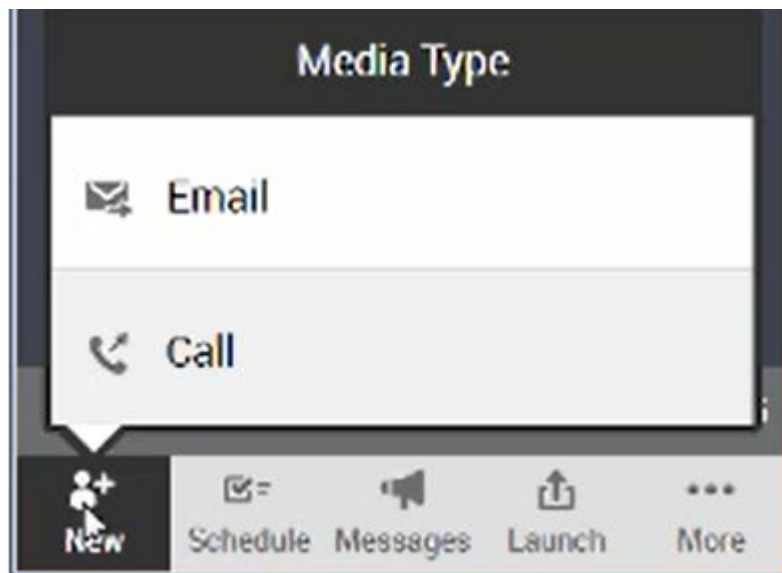
Outbound call: in MAX select new and select call.
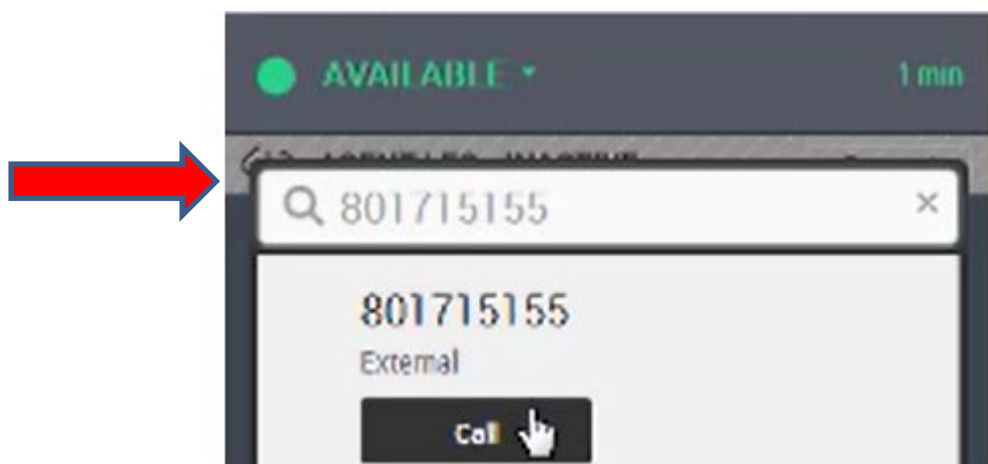
Type outbound number and click call. Press the green phone in Softphone to answer call (see previous page).

Active Queue:

Displays queue assigned to agent. And includes the number of agents logged in and Active/Working/Unavailable in that skill/queue
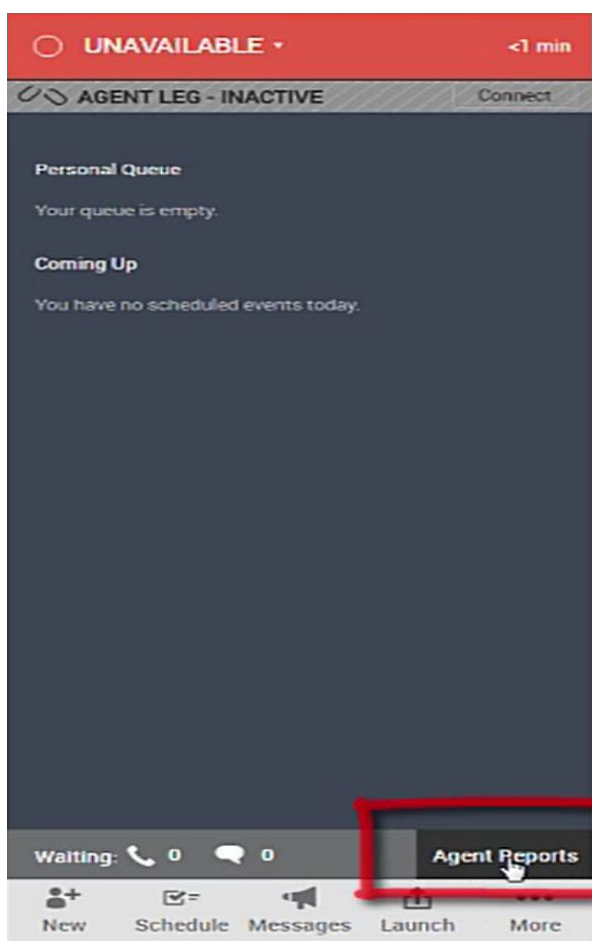
Agent Reports:

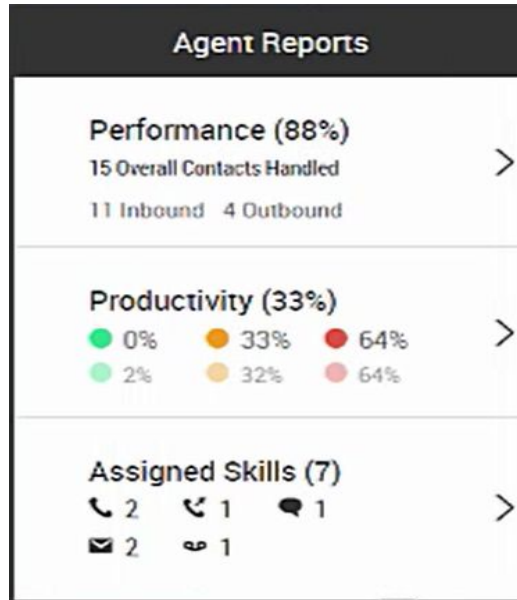Provides access to available reports to assist agent in understanding daily, weekly, team performance.

Notes:

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Agent Reports

Performance (88%)
15 Overall Contacts Handled
11 Inbound   4 Outbound

Productivity (33%)
- 0%   - 33%   - 64%
- 2%   - 32%   - 64%

Assigned Skills (7)
📞 2   📞 1   💬 1
✉ 2   🎧 1

Report:
The 3 available reports are: Performance, Productivity, Assigned Skills

Performance:
Reflect that number of calls taken by you and your team Today, Yesterday and the last 7 days.
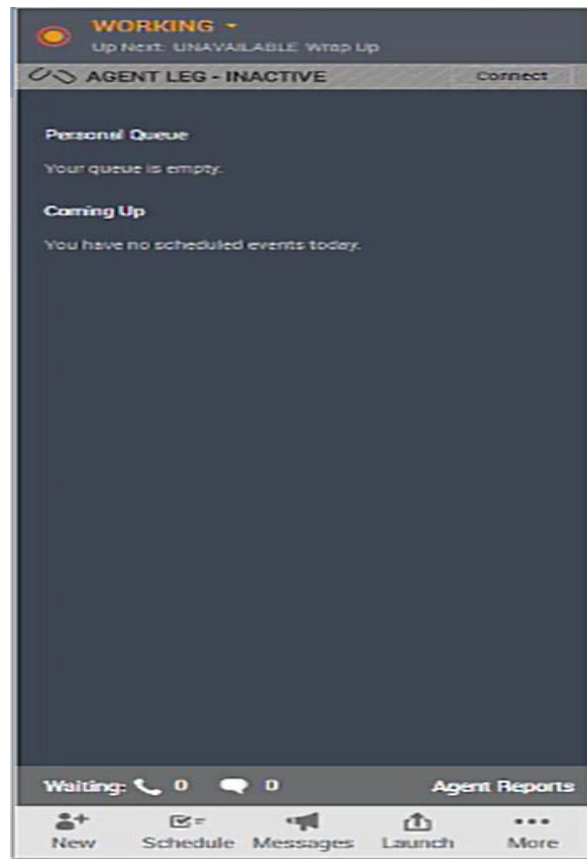
Productivity:
Reflects percentage of time spent in each of 3 states
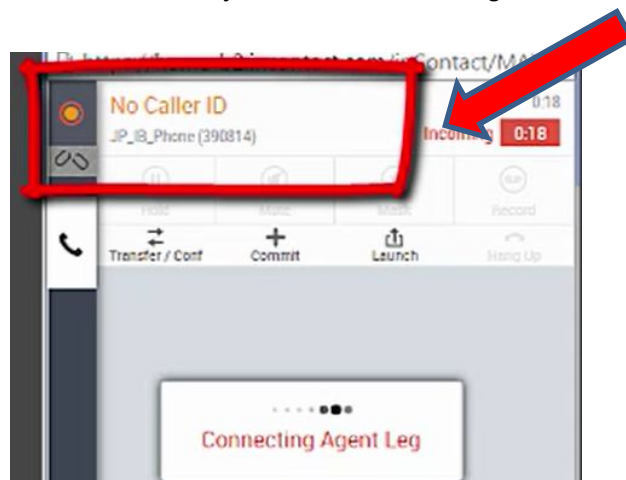Available/Working/Unavailable for today, yesterday and the last 7 days.

Assigned Skills:
Reflect the list of skills assigned to agent

Notes:

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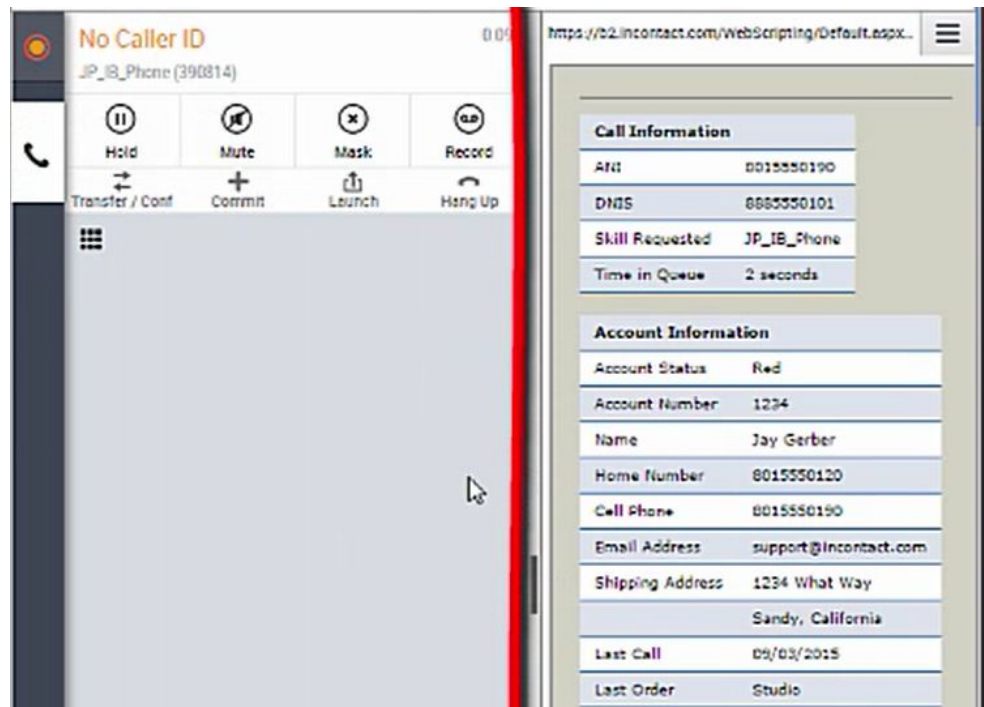
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Status: When a call comes in your status will change from available to working

Contact information will show up on upper left corner of screen.

Panels:
Tabs that may display customer information or agent scripts which can be used for the call.
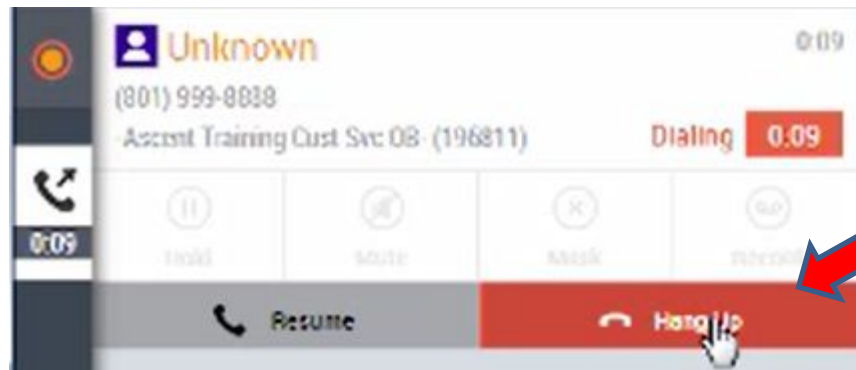

Hold: Agent can place customer on hold (turns Red), a timer will reflect hold time. Agent can't record or hang-up the call while on hold.

Mute: Customer will not be able to hear you (button turns red), while muted agent can't hang-up.
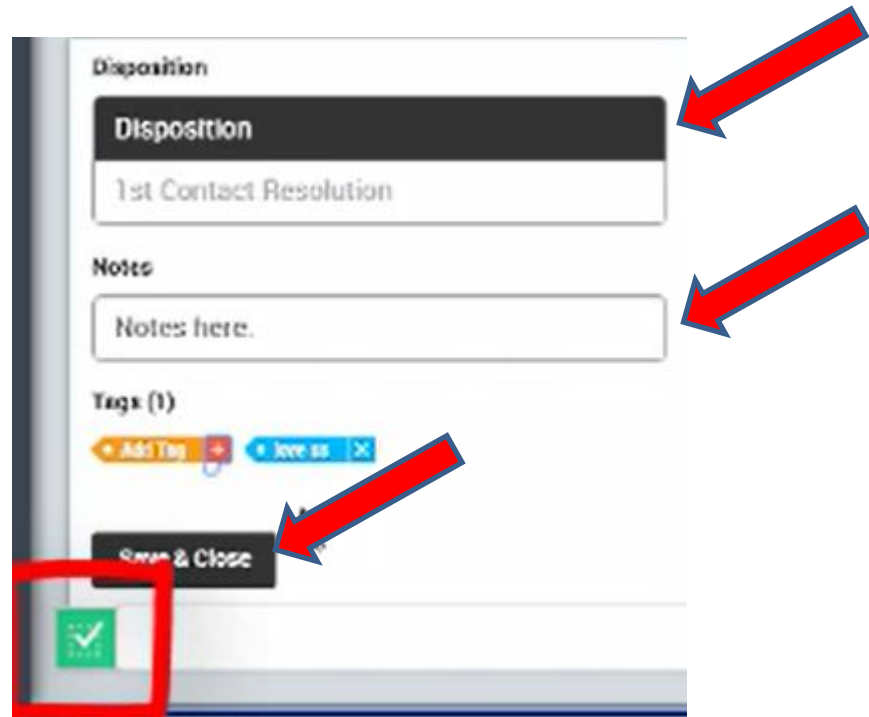

Record: Cannot stop a recording once started, agent must disconnect/hang-up the call to end recording.

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End Call:

To end a call, click the hang-up button, then confirm by clicking again.

Disposition:

After hanging up agent will be required to add a disposition to the call, select from drop down.

Notes Field:

Agent will have to options of adding notes pertaining to the call.

NOTE: Once disposition is added the black check mark in the lower left-hand corner will turn **Green**. Click **Save & Closed**. Agent will **NOT** return to available status until after call work is complete.

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