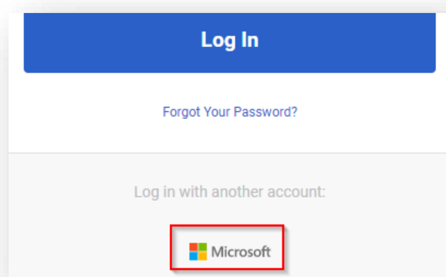
GETTING STARTED

GENESYS CLOUD LOGIN



- Login via Genesys link on EmpowerNet
  - Login with another account: Click the **Microsoft icon**
  - Enter CAMPUS email and Windows password
  - Terms of Service: Click **Accept**
  - Click **Next**
  - Enter security questions and answers
  - Click **Done**
  - Stay signed in: Click **Yes**
  - Click **Collaborate/Communicate**
  - If prompted to “Use your microphone,” Click **Allow**

SETTING UP A DESK PHONE

- Access may be enabled (when logging in)- indicated by a blue phone
- If red- Click the red **Phone Icon** from the left menu

- Click **Phone Details** icon from top bar menu
- Click **Select Phone**
- Click **Use Default Phone**
    - This number will match the MAC address number (sticker on the physical device)
    - Example: VVX250_48256743D74C

MOVING PHONE ACCESS TO ANOTHER LOCATION

- Click the **Phone Icon** from left menu
- Click **Phone Details** icon from top bar menu
- Click **Down Arrow** next to employee name
- Click **Select Phone**
- Search: Type in MAC address from the physical phone being used or tested and select
- If someone else will be signing in at a desk after employee leaves- Employee must log out of desk phone first

USING A HEADSET (SOFTPHONE)

- Switch to employee WebRTC phone
    - Click the **Phone Icon** from left menu
    - Click **Phone Details** icon from top bar menu
    - Click **Down Arrow** next to employee name
    - Click **Select Phone**
    - Click employee name
        - If name does not appear- Search by name and select
- Employee must update their headset settings upon first use
    - Click **Profile Icon** from left menu
    - Click **Preferences**
    - Click **Sound**
    - Audio Device Profile dropdown: **New Profile**
    - Give new profile a name
    - Choose appropriate options for microphone and speakers for headset
    - Click **Save**
- Volume for calls, phone ringer, chat notifications and interaction notifications can be updated under Volume Settings

SETTING STATUS- BEGINNING OF DAY

- Defaults to Available (allows incoming calls from internal and external numbers)
- To change- Select **Profile Icon**
    - Select applicable status

        - Status other than available will send direct extension calls to voicemail (internal AND external calls)

CREATING A DESKTOP SHORTCUT & ENABLING NOTIFICATIONS

Opens Genesys in a window separate from other browsing tabs for faster access/navigation

- Google Chrome
    - Log into Genesys
    - Click **Settings**, **More Tools**, **Create Shortcut**
    - Pop-up: Change shortcut name to Genesys
    - Check box next to **Open as window**
    - Click **Create**
- Desktop
    - Locate new shortcut
    - Drag to taskbar
- Genesys
    - Open Genesys via new shortcut and log in
    - Click **Profile**
    - Click **Preferences**
    - Click **Notifications**
    - Check box to **Allow Pop-up Notifications**
        - Send test notification to verify

LOGGING INTO QUEUES- WHEN READY TO TAKE INCOMING QUEUE CALLS

- Toggle status in top right corner to On Queue
    - Call will ring for 20 seconds
    - If missed- Employee will be put in Not Responding status
    - Employee must go On Queue to take calls again
- Change status when away from desk- This will take employee Off Queue
    - Employee must toggle On Queue when back to desk

LOGGING OUT OF PHONE- END OF DAY

- Click **Profile Icon**
- Click **Logout**

GROUPS

- Employees in a Group can be reached by their phone extension
    - Ex: Accounting 10300
- Call forwarding
    - If call forwarding is enabled, Group extension calls will not be received
- Voicemail

        - Members of a Group can check the Group voicemail via the **Inbox Icon**
        - Deleted voicemails are removed from the inbox of all other Group members
- Status
    - Group members with a status other than Available will not receive calls to the Group
- Calls to a Group ring one of two ways:
    - Broadcast- Rings all Available employees within the group
    - Rotary- Rings one Available employee at a time until answered/goes to voicemail

QUEUE GROUPS

- Toggle On Queue to accept incoming calls
    - Incoming calls ring for 20 seconds, cycling through Queue Group members who are On Queue
        - If missed- Employee status changes to Not Responding
        - If away from desk- Change status, taking employee Off Queue
        - Employee must go On Queue to take calls again after both scenarios
    - Toggle Off Queue when leaving for the day
- Call forwarding
    - If call forwarding is enabled, Queue Group extension calls will not be received
- Employees in a Queue Group receive voicemails in the form of Callbacks
    - Refer to Voicemail section details
- Queue Group members with a status other than Available will not receive calls to the Queue
- Call routing from main line
    - Loan Payoffs- Sent directly to Relationship Specialist Queue
    - Delinquent Loans, Repossessions and Foreclosures- Sent directly to Collections Queue
        - 25 days past due on Loans
        - 55 days past due on Credit Cards
        - Warning code of Repossession/Foreclosure in Symitar on account

INCOMING QUEUE CALLS

- Click **Answer**
- Assist caller (verify via Member Verification Specfile if applicable)
- End Call
- Select a **Wrap Up Code**
    - PBP code required when completing a Payment By Phone
- Click **Done**

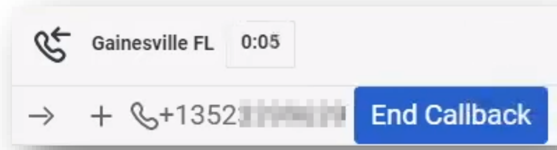
CALLING ON BEHALF OF A QUEUE

IMPORTANT: If calling a Non-Member, representative must disclose the call is being recorded

- Click the **Interactions Icon** on left menu
- Click **+** to start a new outbound conversation

- On behalf of queue: Type queue calling on behalf of
- Number of Contact: Type/dial phone number attempting to call
- Select **Green Button** or **Enter** twice on keyboard
- All outgoing PBP calls will need to be completed on behalf of the Member Services queue
    - If service center employee has no access to queue- Contact a Call Center Support Agent within the service center to make the call
        - Member Verification Specfile must be used if necessary
        - Must select PBP wrap code

CALLBACKS



- Callbacks are generated by Queue Group voicemails OR members electing within certain queues
- DO NOT select End Callback until callback is complete
    - Callback will be lost and cannot be retrieved
- Listen to voicemail (if applicable)- Click **Play Button**
- Initiate callback- Click **Phone Number/Employee Name**
    - Calling back to another phone number: Click **+ Sign** and type new number
    - Forwarding to another employee- Click **Right Arrow** and search for employee name
- Click **End Callback** once caller has been assisted and call is completed

VOICEMAIL

SETTING UP VOICEMAIL GREETING

- Employees will need to record a new recording when going out of office and when returning
- Dial ***86**
- Voice prompt: "Options" OR dial **3**
- Voice prompt: "Greetings" OR dial **2**
- Voice prompt: "Record Greeting" OR dial **2**
- Record new greeting
- Voice prompt options:
    - "Save Prompt" OR dial **1**- immediately saves
    - "Review" OR dial **2**- listen to greeting
    - "Re-record" OR dial **3**- record greeting again
    - "Cancel" OR dial **4**- discard new greeting

CHECKING VOICEMAIL FROM A NON-GENESYS PHONE

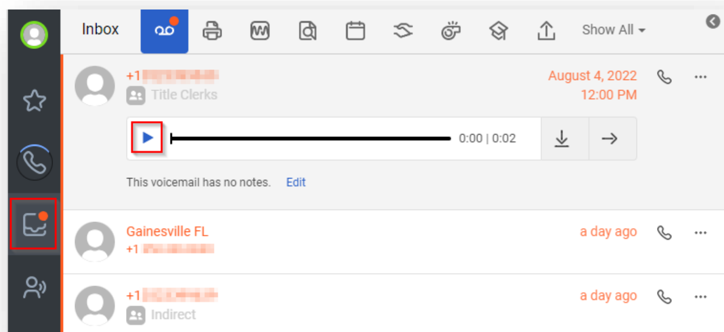
- First time user: Set up a voicemail PIN
    - Click **Profile Icon**
    - Click **Preferences**
    - Click **Voicemail PIN**

- New PIN: Type a 4-digit PIN
- Verify new PIN: Type 4-digit PIN again to confirm

- Call 352-474-5302
  - Press **2**
  - Enter **Extension**
  - Enter **Voicemail PIN**

CHECKING VOICEMAILS (PERSONAL OR GROUPS)

- Voicemails can be checked by dialing *86 OR
- Click the **Inbox Icon** on the left side menu- A list of voicemails will display
- Click the **Voicemail**
  - Department voicemails will have group symbol and department name next to them
- Click the **Play** button
  - Voicemail will play through client headset OR pc speakers
- Click the **Three Dots** on the right

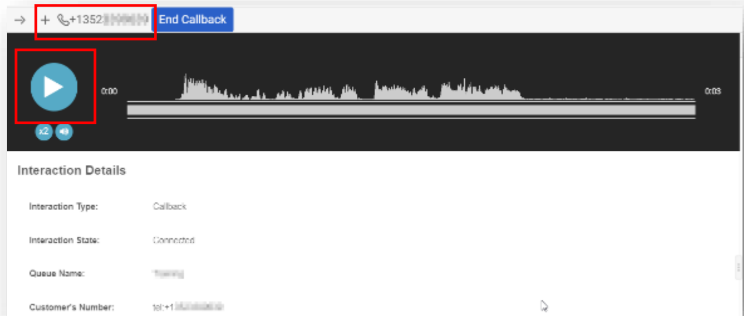


- Click **Delete Voicemail** if no longer needed
  - Department voicemails will prompt a message that voicemail will be deleted for all other members of the group
  - Employee listening to voicemail should take ownership to resolve before deleting

CHECKING VOICEMAILS (QUEUE GROUPS)

- Employee MUST be “On Queue” to receive
- Click **Answer** on callback coming through the queue
- Click **Play Button** to hear voicemail
- Voicemail can be forwarded to another employee by selecting **Transfer** icon
  - Be sure the employee receiving the callback transfer is available and aware of the transfer

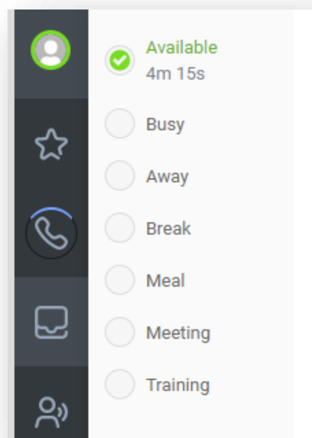
- Select the **Phone Number/Extension** to call back
    - **DO NOT** click end callback until end of interaction or voicemail cannot be retrieved after
- Upon completing callback- Hang up
- Select appropriate **Wrap Up Code** from right side menu within 30 second wrap up timer
- Click **Done**
- Click **End Callback**



SETTINGS

SETTING OUT OF OFFICE STATUS

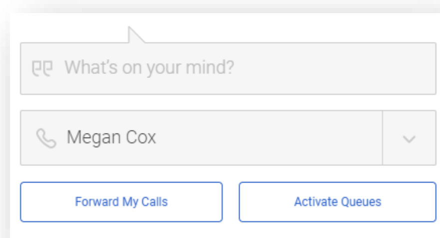
- Click **Profile Icon** on left side menu
- Click **Out of Office** on bottom left
- Toggle status from **Off** to **On**
- Set **Start Date** and **Start Time**
- Set **End Date** and **End Time**
    - Select **Indefinitely** if unsure of return
- Click **Save**
    - Profile icon will now have pink ring to indicate out of office has been activated
- To remove out of office status- Repeat steps and toggle status from **On** to **Off**
- If calls are set to forward to another phone, phone will still ring while in Out of Office status
    - Voicemails will be sent to Genesys inbox



SETTING CALL FORWARDING TO ANOTHER PHONE (CELL)

Call forwarding will not work if employee is part of a group or queue, as incoming calls will skip over the employee. Call forwarding will only work for answering incoming calls.

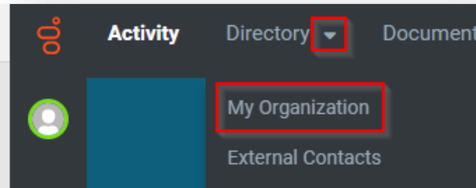
- Click **Profile Icon** on left side menu
- Click **Forward My Calls**
- Toggle status from **Off** to **On**
- Find me at the following numbers: Type in **Remote Phone Number**
- Click the **+** to add number
- Use the voicemail service of this external number: **DO NOT check box**



- To set calls back to work phone- Repeat steps and toggle status from **On** to **Off**

SEARCHING THE EMPLOYEE DIRECTORY

- Click **Directory** from top bar menu
- Click **My Organization**
- Click **People** or **Groups Tab**
    - This allows you to see all users and groups alphabetically
    - Clicking the **Star** next to a name will favorite employee
    - Clicking the **Phone** next to a name will call employee

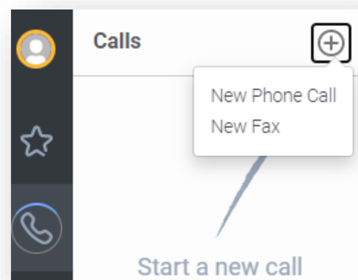


- If searching for a specific user, type employee name in the **Search Bar** on the top right
    - Click **Employee's Name** to view profile
    - Email and extension will be listed under contact information

BASIC CALL FUNCTIONS

PLACING A CALL

- Click **Phone Icon** from left menu
- Dial pad will appear
    - Search Box: Type employee name, extension or external phone number
- Click **Green Phone Button** OR press **Enter** on keyboard twice to initiate call



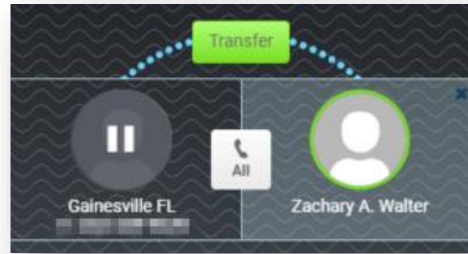
MUTING A CALL

- While connected- Click **Mute Icon** (microphone)
    - Clicking icon again will unmute

PUTTING A CALL ON HOLD

- While connected- Click **Hold Icon** (pause)
    - Call recipient will hear hold music
    - Clicking icon again will resume call

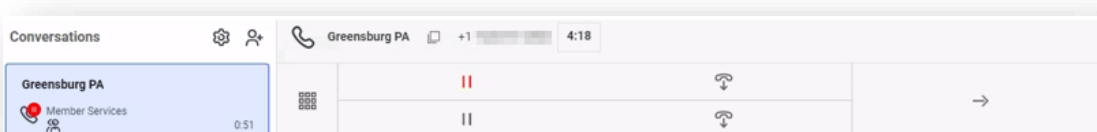
TRANSFERRING A DIRECT CALL



- While connected- Click **Other Options Icon** (down arrow)
- Click **Transfer**
- Enter employee name or queue to transfer and click on it
  - If transferring to an external number- Must dial 1 before the area code
- Click **Blind** to transfer call immediately OR
- Click **Consult** to speak to employee before connecting
  - Member will hear hold music
  - Speak to employee to confirm okay to transfer
  - Click **Transfer** to connect two parties OR
  - Click **All** for conferencing all parties

TRANSFERRING A QUEUE CALL

- While connected- Select **Transfer** or **Consult**
  - Transfer- Connect caller to employee
  - Consult- Speak to employee before connecting caller
- Enter employee name, phone number or queue to transfer
  - If transferring to an external number- Must dial 1 before the area code
  - Filter by categories for easier search
- Click to select caller or queue
  - Consulting- Member will hear hold music and red pause on call will show in Genesys
    - Speak to employee to confirm okay to transfer
      - Clicking **Pause** on bottom call will put employee on hold
      - Clicking **Pause** on top call will allow to speak to the member again
      - Clicking **Pause** on both calls allows a conference call between all parties
    - Click **Transfer** arrow to connect both parties when ready



TRANSFERRING A CALL ON A CORDLESS HANDSET

- While on a call- Select **Options**
- Select **Transfer**
- Enter 10 digit phone number, select a contact from the directory OR choose a number from recent calls
- Select **Call** or **OK**
  - Will be connected with second party only
- Select **Transfer** to complete and connect two parties

RECORDING A CALL

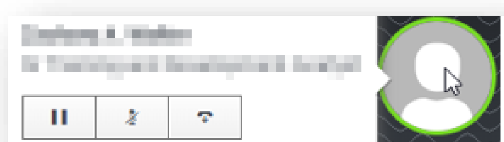
- Recordings only saved locally- **DO NOT USE THIS OPTION TO RECORD PAY BY PHONE CALLS**
- While connected- Click **Other Options Icon**
- Click **Record**
  - Click **Stop Recording** when complete or recording will end upon disconnection

RETRIEVING A RECORDING

- Click **Inbox Icon** from the left menu
- Click **Recordings Icon** from top bar
- Click recording
- Click **Play Button**
- Click **Download Button** to the right of the recording to save to computer

CONFERENCING A CALL

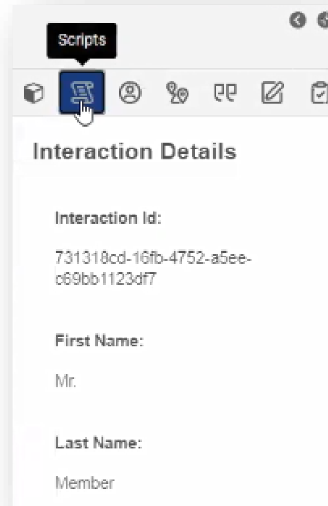
- Start a new call
- Once call is established- Click **Other Options Icon**
- Click **Add Participant**
- Dial pad will appear
  - Search Box: Employee name, extension or external phone number of additional participant
    - If dialing an external number- Must dial 1 before the area code
- Click **Green Phone Button** OR press **Enter** on keyboard twice to initiate call- all conference call participants will show
- Hover over a participant
  - Click **Pause Icon** to put participant on hold
    - Participant will hear hold music
  - Click **Mute Icon** to no longer hear participant
    - Muted participant still hears conversation
  - Click **End Call Icon** to end conversation with participant



- Other participant will remain on the line

- Click **End Call Icon** to disconnect from all participants

CHATS



- Queue: eServices(Web Messenger)
- Click **Answer**
- Chat will appear in interactions window
- Select **Scripts Icon** to see Member's information
- Enter messages into the chat box
- Select **Enter** to send chat message
- Chats will remain open for 72 hours for the member to respond back
  - No response after 1 minute- Confirm the member is still there
  - No response 1 minute after confirmation- Send closing message
- Select **End Messages Icon**
- Select appropriate **Wrap Up Code**
- Click **Done**

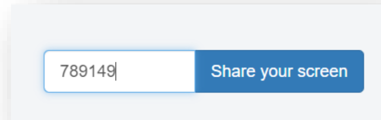
EMAILS

- Queue: eServices(Email)
- Click **Answer**
- Email will appear in interactions window
- Click **Reply**
- Enter message into the email box
- Select **Show Message History** to view any other emails within the thread
- Select **Discard** to delete draft
- Select **Send** to submit email reply to Member
- Select appropriate **Wrap Up Code**
- Click **Done**

SCREEN SHARE

- Member must access www.campuscu.com/screenshare
  - Supported desktop browsers: Google Chrome and Mozilla Firefox
- While on call- Click **Screen Share Icon**

- Give member 6 digit security key
    - Member will enter security key
    - Member will click **Share Your Screen**
    - Must select which screen they want to share (if multiple)

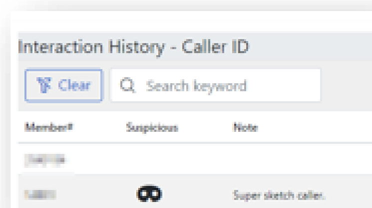


- View the member's screen within Genesys client window
    - Click **Full Screen Icon** to view larger
- Member will click **Stop Sharing** OR
- Click **Leave Session** to stop screen share
    - Must do before ending call or will lock and have to contact Service Desk to unlock

SMART APPS

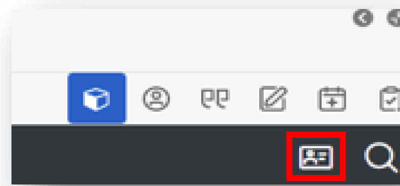
- Incoming Call: Select **Answer**
- Select **Smart Apps Icon** on right menu

- Will show information based on Account Number and Date of Birth entered by Member during call
    - Identified: Account Number and DOB match Symitar information
    - Not Identified: Account Number and DOB do not match Symitar or were not entered
        - Member will still be required to be verified via Member Verification Specfile
    - Use **Magnifying Glass Icon** on right to search for Member by Account Number, Social or Debit Card Number if necessary
- Authentication History tab- Can change radio buttons to display history based on Member and Caller ID
    - Warnings alert employee to multiple calls in a short period
    - Mask icon under Suspicious indicates call has been flagged
        - Hover over note to read more information before proceeding



- Caller Identity tab- Can view caller information and tag calls as suspicious
    - Select Caller: Click the member calling
        - Joint may indicate joint on account OR loan
        - Verify relationship in Symitar before providing sensitive account information
    - Select **Suspicious** if the call may be fraudulent in nature
        - Must type a note about call
        - Click **Update Note/Suspicious**
            - Note appears in Authentication History and is emailed to Call Center Management team automatically
- Security Details tab- Contains Member demographic and account information
    - This screen **will not** be used for verifying Members

- Select **Pop Account Screen Icon** to open Member's account within Symitar window
    - Must have an active session of Symitar open for this feature to work
- Use **Member Verification Specfile** to verify Member and complete call
- Select appropriate **Wrap Up Code** within 30 seconds
- Click **Done**



EMPLOYEE AVAILABILITY (MANAGERS)

CHANGING AN EMPLOYEE'S STATUS OR QUEUE AVAILABILITY

- Top bar menu: Select **Performance**
    - Other tabs open: Click the **+** then **Agent Performance**
- Select **Workspace**
- Select **Agent Performance**
- Search for the employee
    - Click **Magnifying Glass**
    - Filter Users: Type employee name
    - Select User
- Hover over dot to the left of employee's name
    - Drop down: Selecting anything other than Available will direct all employee's calls to voicemail
    - Toggle on or off queue to change employee's ability to take queue calls

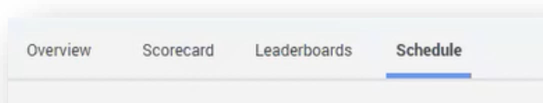
QUEUE AVAILABILITY

- Top bar menu: Click **Performance**
    - Other tabs open: Click the **+** then Click **Queue Activity**
- Click **Workspace**
- Click **Queue Activity**
- Click on the **Queue Name**
    - Waiting: Number of calls holding
    - Interacting: Employees currently on a call
    - Alerting: Employees have an incoming call ringing
    - On Queue: Employees available to take calls
    - Off Queue- Employees unavailable to take calls

SCHEDULING & SHIFTS (CALL CENTER)

VIEW SCHEDULE

- Top bar menu: Select **Activity**

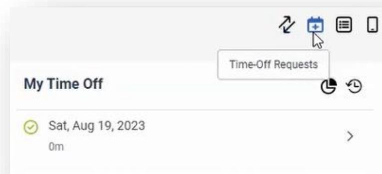


- Select **Schedule** or **View full schedule**
- **Click** Refresh
- Modify filters to adjust schedule view
- Agent schedule (including breaks, meals, trainings, etc.) will appear

VIEW, REQUEST, OR CANCEL TIME OFF

Time off requests should be submitted via Paycom in addition to Genesys

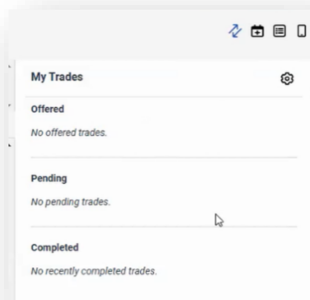
- Go to **Activity > Schedule**
- Click **Time Off Requests** icon 
- Existing requests appear under **My Time Off**
    - Requests can't be modified; if modification is required cancel the request and submit a new one
    - Select the request from **My Time Off** and click **Cancel**



- Click **New Request**
- **Type**: Time Off
- **Full Day**: Defaults to full day (adjust if requesting a partial day)
- Select day(s) on the calendar
    - Existing requests appear on the calendar with a colored circle
- Add notes (optional)
- Click **Next** and **Submit**

TRADE SHIFTS

- Go to **Activity > Schedule**
- **Click** Refresh
- Click **Shift Trades** icon 
- Click **New Trade** and do one of the following:
    - Click Trade above the shift in your schedule view
    - Click Open next to the shift you want to trade



- Under **Trade With**, select **Anyone**
- Under **Willing to accept**, select the days you want to work instead
- To specify the start and end times for an acceptable trade, do the following:
    - Check the **Limit time range** box
    - To adjust the shift start and end times for an acceptable trade, use the up and down arrows under **Shift Start** and **Shift End**
- If existing trades match, they appear under **Matching Trades**
- To set a time limit for how long the trade is available, under Expiration date set the date and time
- Click **Submit**

- The **My Trades** panel changes to display offered, pending, and completed trades

QUEUE REPORTS

CREATING

- Top bar: Click **Performance**
- Click **Workspace**
- Click **Queue Performance**
- Click the appropriate queue from the hyperlink list
- Click the **interactions** tab across the top bar
- Click the **date** to change the interval
    - Select from a list of presets or change dates from the calendar view
- Use filters to customize the data
- Right menu: Click **download** icon to export as CSV or PDF
    - These are sent via email
- Click the **save** icon to save the view

EMERGENCIES

INCOMING 911 CALLS

- Calls from 911 will broadcast to all phones within service center location
- Pick up this call ASAP

OUTGOING 911 CALLS

CALLING FROM A DESK PHONE IN THE OFFICE

- Dial 911 on physical phone
    - 911 will receive service center address

CALLING FROM WEBRTC PHONE (GENESYS CLIENT SOFTWARE)

- Dial 911 from cell phone
    - Give 911 service center address