



Address Book

Common Personal

Filter: all entries shown

Name

- Contact Centre
  - Support
    - bank\_operator
  - Sales
  - Review
    - Tech Support
  - Quality Management

Name

Status

- Simpson Ann Talk
- Borg Charles Offline
- Muscat Mario Offline
- Brincat Alexios Offline
- Kharbouch Mimi Offline
- Evans Shirley Offline
- Nassalo Alexandra Offline
- Bajada Simona Offline
- Smith Fred Lee Offline
- Watson Donna Offline
- Turner Alex Offline
- 18433769678 Offline
- Mozgov Timofey Offline
- Engles Nicolo Wlawa Offline
- Jones James Offline
- Supervisor J.K. Jeam ... Offline
- QM Laurie Burton Offline
- Agent Pink Patrik Offline

Call center

Call info

Voice mail

Call history

Local records

Text messages

Statuses

Log

## Customer Info

Customers found: 1

Name/title	Address	Numbers
Gusev Alexey Alexey	Moscow	7 916 539 19 34

- ☒ New customer
- ☐ Do not bind call to customer

 Search

Person

Last name

First name

Organization

Position

## Incoming Message

From: Alexey Gusev &lt;agusev@nodacontact.com&gt;

Subject: terms of early repayment

Hi

Could you describe the terms of early repayment. I want to pay \$2000 next month.

—

With regards,  
Alexey Gusev,  
Product Manager,  
+7-916-539-1934  
[www.naumen.ru](http://www.naumen.ru)

Reply

Finish

## Contact history

	Delivered at	From	To	Subject
	9/3/15 1:19 PM	Alexey Gusev <agusev@nodacontact.com>	training3@nodacontact.com	terms of early repayment
	9/2/15 7:13 PM	servicedesk@yourcompany.com	Alexey Gusev <agusev@nodacontact.com>	balance
	9/2/15 6:46 PM	Alexey Gusev <agusev@nodacontact.com>	training3@nodacontact.com	balance
	9/2/15 6:12 PM	Alexey Gusev <agusev@nodacontact.com>	training3@nodacontact.com	check balance

## Sending Message

Subject: RE: terms of early repayment

Good day, Alexey!

Yes, you can do it any day, without any limits!

Kind regards,  
Simpson Ann  
Key Account Manager  
BEST BANK

Send

Contact  
**Bart Simpson**

✓ Following

Edit

New Case

New Note

Title  
Director of Customer Service TeamAccount Name  
[Account Name-P9](#)Phone (2)  
925-555-01234Email  
[bart.simpson@f9-work-test.com](mailto:bart.simpson@f9-work-test.com)Contact Owner  
[Alex Bullo](#)

Related

Details

News

Engage

Agent Name  
[Agent Email@Five9 Success.com](#)

Ready (All)

2:20

New Call

Text Queue

Missed Calls

Voicemail

Reminders

Conversations

Add to DNC

Me

Queue

0

Calls

0

Calls Answered

0:00

AHT

0

Missed

0

Emails

0

Chats

Softphone Connected



00001100

Subject: New Problem in Relation to Feature Request.  
Priority: Medium  
Date/Time Opened: 3/6/2019 10:18 AM

00001098

Subject: New Feature Request for Case  
Priority: High  
Date/Time Opened: 3/6/2019 10:18 AM

Activity

Chatter

New Task

New Event

Log a Call

Email

Create a task...

Add

Filters: Within 2 months - All activities - All types

Refresh Expand All

Next Steps

More Steps

Send Letter

You have an upcoming Task

Mar 29

Call

You have an upcoming Task

Mar 22

Past Activities

Meeting

You had an Event

11:00 AM | Yesterday



### Find incoming caller

Phone

Name

Date of Birth

Find

Clear



**Mr. Tom Reynolds** [Edit](#)

HM Agency Chicago West Copywriter

Detail

Journal

Insurance

Addresses

+ Add



Home

670 Edgewater Court, Morris, IL, 60450, USA

Communications

+ Add



Business

+1 815-606-4001



Email

tom.reynolds73@gmail.com



Home

312-556-7878



Mobile

212-445-0090

Recent Activities

Description	Start	Status
Auto Quote Aug <a href="#">Edit</a> - psia100 - Aug 21, 2015 10:22 AM	21-08-15	Outstanding
Premium Increase (303) Change due to state premium increase. <a href="#">Edit</a> - psia100 - Aug 20, 2015 8:00 AM	20-08-15	Outstanding
Portfolio Review - Reynolds's Household Agenda: 1. Market trends 2. Past performance 3. Additional diversification 4. Emerging markets <a href="#">Edit</a> - nexja - Aug 19, 2015 1:00 PM	19-08-15 1:00 PM	Outstanding

Created nexja 23-07-15 3:37 PM, Edited psia100 21-08-15 3:29 PM

### Authentication

Profile Questions

Before we proceed, I need to ask you a few questions.

What is your home address?

What is your home postal code?

What is your date of birth?

Previous

Next

Caller

[Confirm](#)

On Behalf Of

[Confirm](#)

Service Request [Select...](#)

Call Description

Call Scripts

Call Notes

Call Note will automatically save when the call is ended.

[Follow-Up](#)

[Cancel Call](#)

[Transfer Call](#)

Name	Company
Reynolds, Tom	HM Agency Chicago

Company	Household
Reynolds <ul style="list-style-type: none"> <li> Reynolds, Diane             <ul style="list-style-type: none"> <li> Beneficiary</li> </ul> </li> <li> Reynolds, Jennifer</li> <li> Reynolds, Tom             <ul style="list-style-type: none"> <li> Beneficiary                 <ul style="list-style-type: none"> <li> Reynolds, Diane, American Red Cross</li> </ul> </li> <li> Lien Holder</li> <li> Mortgagee</li> <li> Referred by</li> </ul> </li> <li> Reynolds, Zak</li> </ul>	

Errands

Select all

Sort by date

My errands (13)

All errands (250)

Folder 1

Folder 2

New folder

Priority

High priority (2)

Warnings (1)

Collaboration (1)

Expired (1)

Now (8)

Areas

ITdept (2)

Glass specialist

Paper specialist

CRM dept (3)

Agents

Tags

Search tags

Tech staff (2)

Mind reading (4)

Brilliance (2)



Newtag



+ Errand



+ Call



Pick-up next



Chat (2)



**Benny Gulberg** 18:30  
Jag undrar om jag kan få låna en såg  
lördag... 



**Stina Larsson** 12:49  
Nåla visor ett liber o, a pharvns augst  
mollis, est nisl erat portitor facilis... 



**Anders Eriksson** 2  
Just sent you a chat message 

**Vilhelm Spång** 2017-02-20  
Nåla visor ett liber o, a pharvns augst  
mollis, est nisl erat portitor facilis... 

**Annelie Munther** 2017-02-19  
Nåla visor ett liber o, a pharvns augst  
mollis, est nisl erat portitor facilis... 

**Sigvard Lundström** Now  
Nåla visor ett liber o, a pharvns augst  
mollis, est nisl erat portitor facilis... 

**Simon Pettersson** Now  
Nåla visor ett liber o, a pharvns augst  
mollis, est nisl erat portitor facilis... 

**Anna Bergman** Now  
Nåla visor ett liber o, a pharvns augst  
mollis, est nisl erat portitor facilis... 

8 new errands

## FB #14376 - Benny Gulberg



DATE: 2017-02-20, 18:30 FROM: Benny G. (146545520915251) COPY TO: EverilBjörkberg CHANNEL: Facebook STATUS: Warning  
ERRAND: #14376 TO: Lisa J. (146545520915251) AREA: Customer Service CUE DATE: 2017-02-01 ATTACHED FILES: 4 [View files](#)

TAGS: Tech stuff Mind reading Brilliance [Show more...](#) [Add tag](#)



Benny Gulberg

Jag undrar om jag kan få låna en såg nästa  
lördag... /Benny  
Translated from Russian, see original

Sent 18 minutes ago, from Facebook

☒ REPLY ☐ INTERNAL COMMENT ☐ COLLABORATE ☐ FORWARD TO EXTERNALKNOWLEDGE BASE: [See opening hours](#) [Machine mending](#) [Ready to go](#) [Open Knowledge Base](#) SHORTCUTS ASSIST: [Templates](#) [Solution](#) [Signature](#)CHANNEL: FACEBOOK  Font Size English [Profile](#)  
[History](#)  
[Like](#)  
[Hide](#)  
[Delete](#)  
[Star](#)  
[Update answer](#)

ATTACH FILE

ShoreTel Connect Co x

← → ↻

🔑 ⭐

Wrap-up

Log out of my queues ⌵

ⓘ Stop taking requests ⌵

MStep ⌵

👤 Agents

☰ Queues 1

Current Interactions 1

WIRELESS CALLER

+1770851

00:04

Caller ID

+1770851

Caller Name

WIRELESS CALLER

Group

Personal Agent Queue

Service

DNIS

1904

Priority

92

👤

WIRELESS CALLER

+1770851

On Hold

00:04

Wrap Up

15

Seconds



Code name or number 🔍

End Wrap Up

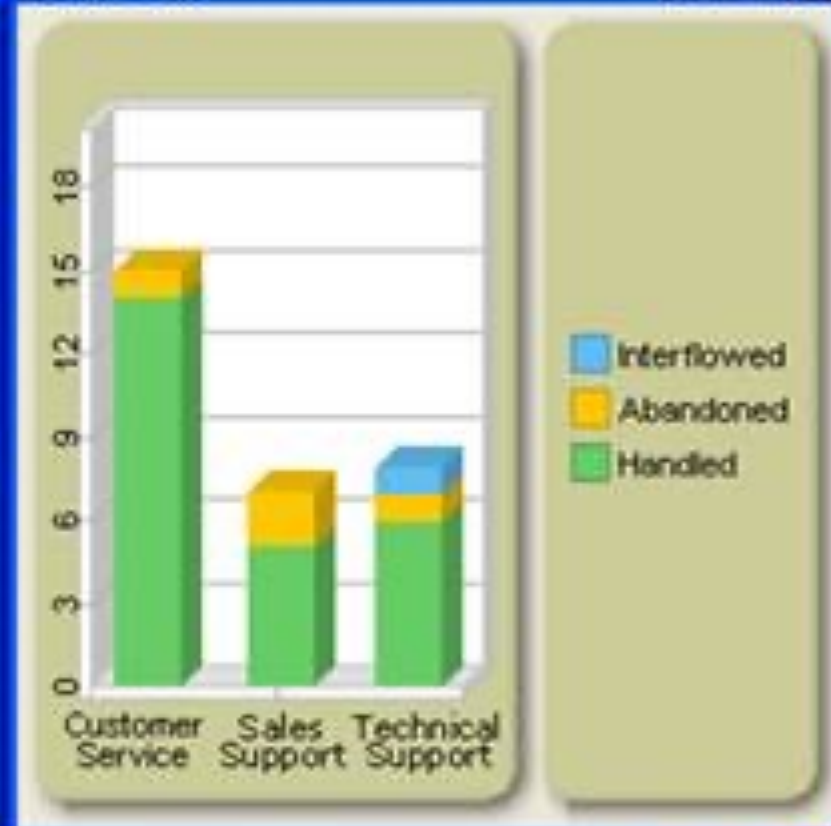
Extend



Extension Monitor - Contact Center View

 Amy M 2013 1102 07:02	 Jason S 2049 05:13	 Strabo S 1129 Coffee Break 24:02
 Mike M 2007 Manager 01:06	 Megan C 1151 13:42	 Michael F 1179 07:06
 Marc L 2089 6135551212 01:24	 Anthony C 1302 Coffee Break 01:49	 Danny H 1158 07:36
 Kristi W 1389 07:20	 Jennifer R 6135553113 02:34	 Jaime D 1596 02:57
 Billy C 1173 6135552121 00:49	 Mark E 1169 00:34	 Lindsey D 1460 07:02
 Jane D	 Matt K	 Milo D

Queue Now

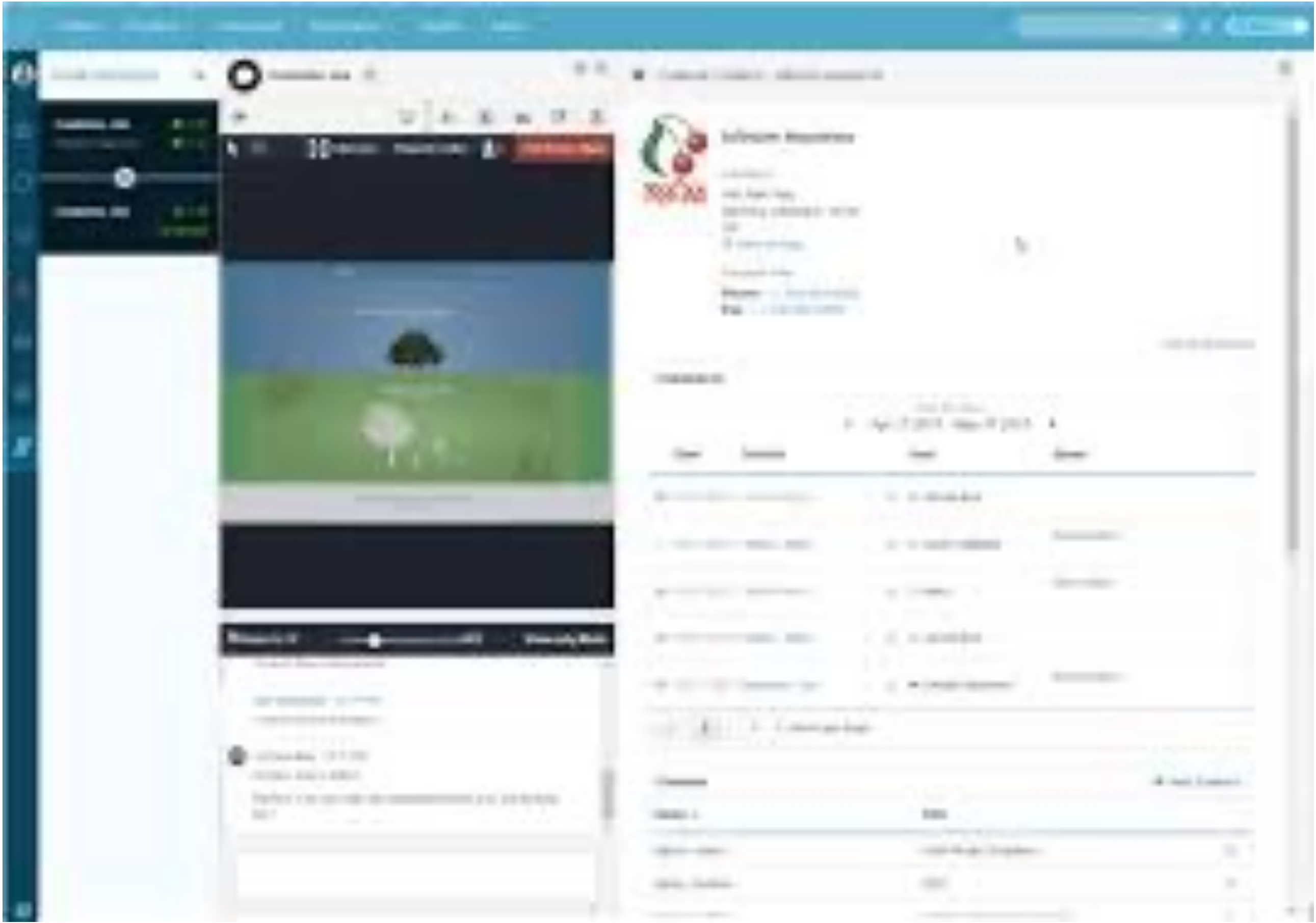


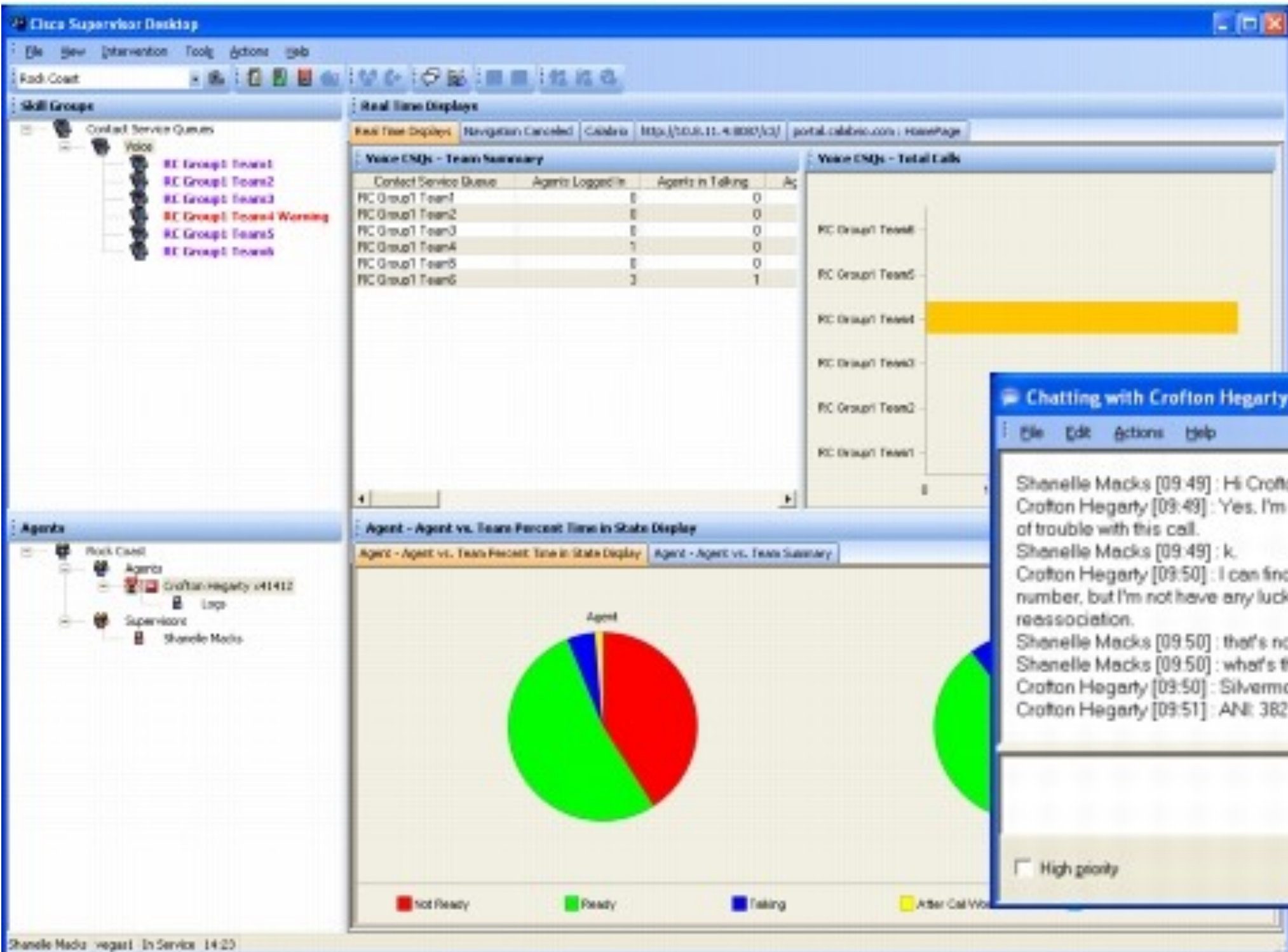
Queue Now

	Queue Status	Media Server	Queue #	Name	Calls Wtg	Long Wtg	Agts Avail	ACD	Idle	Unavail	Offr	Hndl	Abn	Interflowed	Re Q	Avg Time Hndl	Avg Time Abn	Avg Talk Time	Svc Lvl %	% Hndl
+	ACD	Pfprim	P280	Customer Service	0	00:00	2	0	2	2	1	1	0	0	0	14:55	00:00	12:54	80	100
+	ACD	Pfprim	P285	Sales Support	1	00:36	2	0	2	2	25	24	1	0	1	01:02	01:01	11:45	76	96
+	ACD	Pfprim	P151	Technical support	2	01:29	1	1	0	1	20	20	0	0	0	01:12	00:00	22:19	75	100
+	ACD	Pfprim	P292	Training	0	00:00	2	0	2	0	19	17	1	1	0	00:06	00:06	00:36	90	89
+	ACD	Pfprim	P592	Accounting	0	00:00	2	0	2	0	19	17	1	1	0	00:06	00:06	00:36	100	89











A collage of various software interfaces. At the top left is a 'Wrap-up' window for a 'WIRELESS CALLER' with a 15-second timer. Below it is an email interface for 'Katie Lee' with a 'Service Advisory' subject. To the right is a 'Naumen SoftPhone' window showing customer information for 'Alexey Gusev'. Below the email interface is a 'Five9 Demo Web' window showing a contact profile for 'Bart Simpson'. At the bottom center is a 'Contact Center Client' window with a grid of agent status and a 'Queue Now' table. To the right of this is a 'Mr. Tom Reynolds' profile window. At the bottom right is a 'Chatting with Crofton Hegarty' window showing a chat conversation. Other windows include 'Incoming Message', 'Sending Message', and various system status and activity monitors.





## PROTOPERSONA

Contact Center Agent - Mike

- 25-35 years Old;
- Heavy Social Media user;
- Speak more than 2 languages (English & local language);
- Communicative person;

Key Frustration

- Hard to use cx tooling, with cluttered UI that doesn't optimize my workflow;

Goal

- I would like to answer as many task as possible without switch context or feel overwhelming by that;