AGENT MANUAL

XLOGIX

SpeechLogix

HOW TO GET IN TOUCH

The following sections provide information on how to obtain support for the documentation and the software.

Documentation Support

We welcome your comments and suggestions on the quality and usefulness of this document. For any questions, comments, or suggestions on the documentation, you can contact us by e-mail at documentsupport@speechlogix.com.

Customer Support

If you have any problems, questions, comments, or suggestions regarding your Call Center product, contact us by e-mail at support@speechlogix.com.

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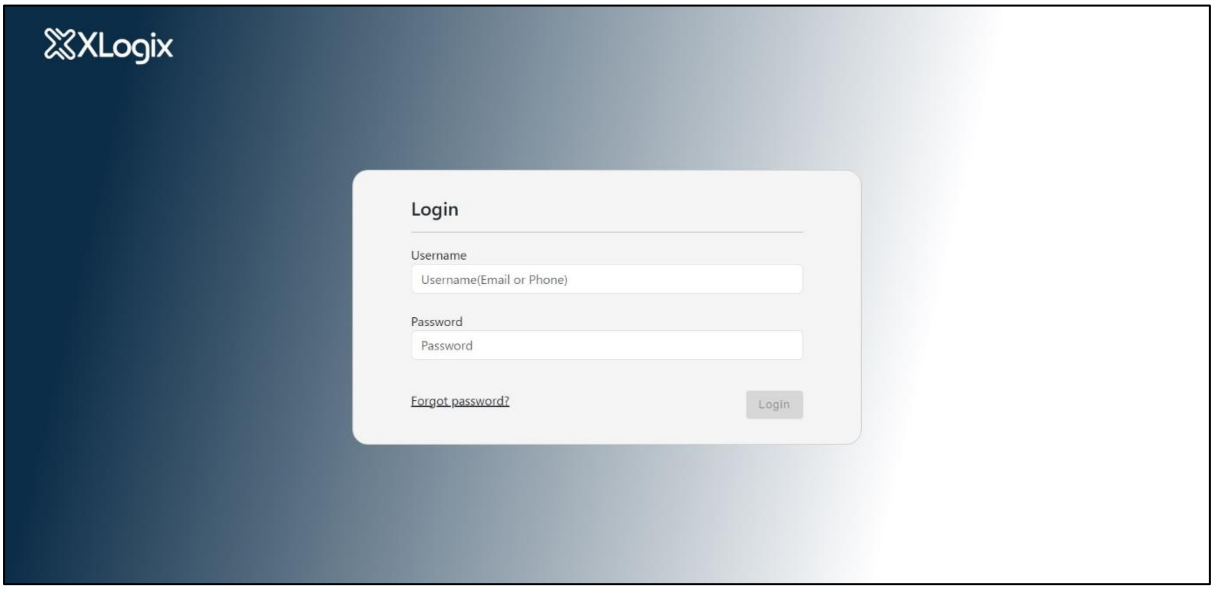
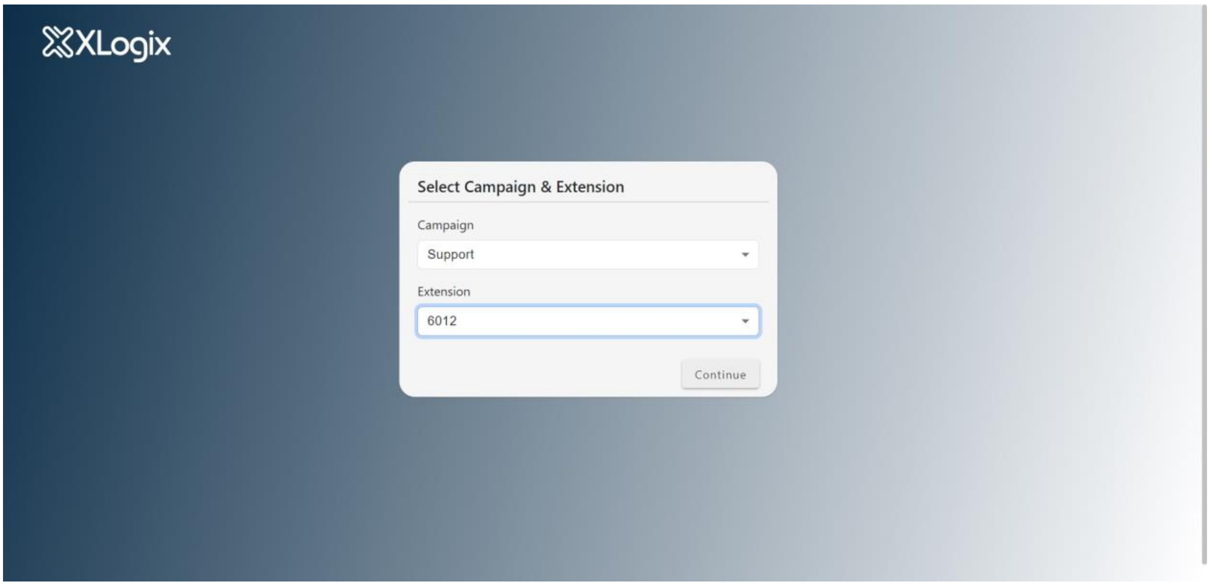
Logging into Xlogix: Agent Console

To access the GUI (Graphical User Interface), the agent should copy and paste the URL in the address bar of the preferred browser and click ***Go***. A login page will appear as shown below. A login page will appear as shown below. Now, enter the **username** and **Password.** Then, click ***Login***.

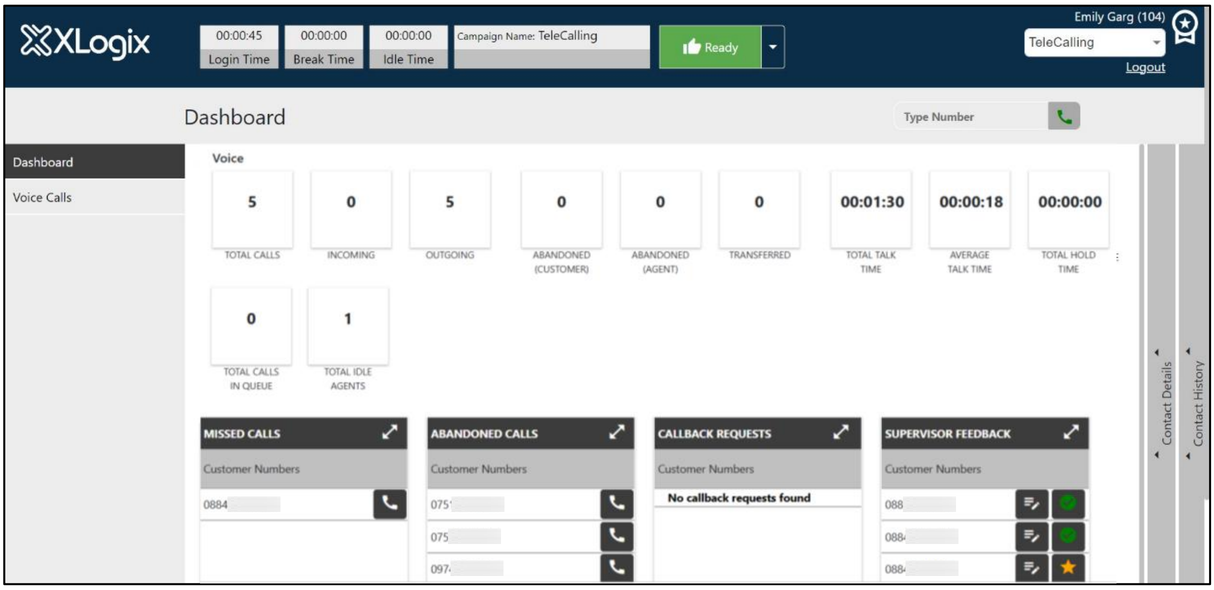


Now, choose **Agents** and select **Campaign** and **Extension** number from the drop-down list and click ***Continue.***



Dashboard: Home Page

This agent dashboard provides a centralized view of key metrics and information to help agents manage interactions with customers for a telecommunications company.



Login Time, Break Time, Idle Time: This section shows the agent's current login session duration, break time (if currently on break), and idle time.

Campaign Name: This section displays the campaign name that the agent is assigned to.

Queue Name: This section displays the queue name that the agent is currently assigned to.

Ready/Not Ready: This indicates the agent's availability to receive calls. In the image, the agent is prepared to receive calls.

Voice: This section likely summarizes the agent's call handling performance. The image shows these details:

- **Total Calls:** The total number of calls handled by the agent (5 in the image).
  - **Incoming:** The number of calls received by the agent (0 in the image).
  - **Outgoing:** The number of calls dialled by the agent (5 in the image).

- **Abandoned Calls:** The number of calls that were abandoned by the customer before connecting with an agent. There are two breakdowns further:
  - **(Customer):** The number of calls abandoned by the customer (0 in the image).
  - **(Agent):** The number of calls abandoned by the agent (0 in the image).

- **Transferred**: The number of calls that the agent transferred out to other agents or departments.

- **Total Talk Time:** The total duration of all conversations the agent had with callers.

- **Average Talk Time:** The length of an agent's conversations, calculated by dividing the Total Talk Time by the Total Calls.

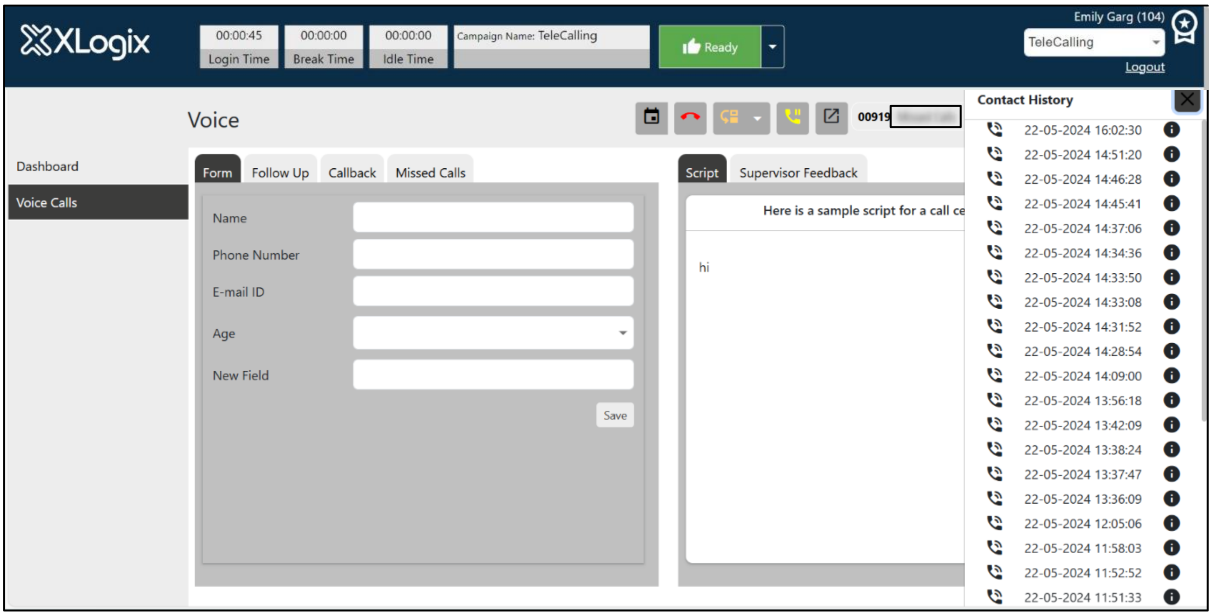
- **Total Hold Time:** The total amount of time callers spent on hold while connected to the agent.

- **Total Calls in Queue:** The number of calls waiting in the queue for an available agent, including those that may have abandoned the call while waiting.

- **Total Idle Agents:** The number of agents currently logged in but not actively on a call or handling another task.

- **Contact Details:** This section likely allows the agent to view the contact details of the customer currently interacting with. The image shows "No data found" under this section, indicating there is no ongoing customer interaction.

Contact History: This section likely allows the agent to view the history of previous interactions with the customer. The previous call history will appear under 'Contact History' when the agent answers the call.



<u>Important Steps Before Taking Calls:</u>

1. ***Log In First:*** *Ensure you are logged in to the agent console* ***before*** *launching the softphone application.*
2. ***Verify Extension Registration:*** *Check the status indicator (top right corner) to confirm your extension is registered. A registered extension is essential for receiving calls.*

3. ***Set Your Availability:*** *Change your status in the agent console to "Ready" to indicate you are available to receive calls.*

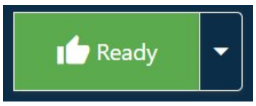
If you miss calls while your status is "Ready", you will not receive any calls and the status will become 'Not Ready'.

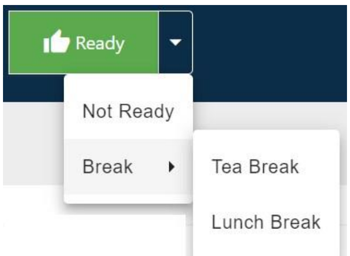
To start receiving calls again, simply switch your status back to "Ready" in the agent console.

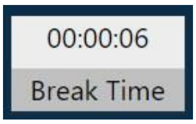
Remember: *By following these steps, you will ensure proper set up and ready to take calls!*

How to take a break

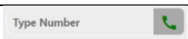
- Click the "Ready Status" button.
- Choose your break type from the expanded menu.
- Once you select the break type, a timer will automatically start, and your status will change to "Not Ready".





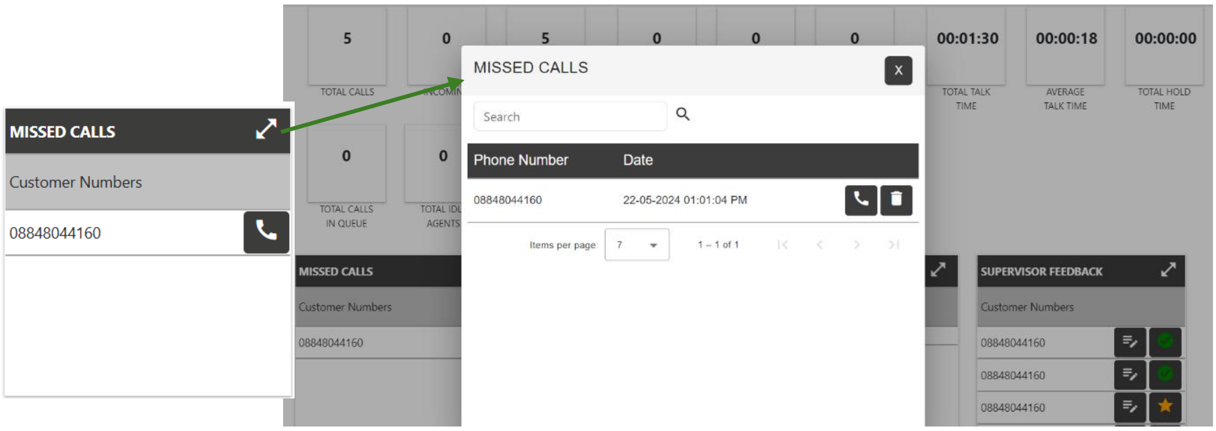


Call-to-action Buttons

	**Follow up: I**f an agent wants to follow up on the call, Click on this icon and select the date & time. Then, click ***Save***. [*The details will be appeared in Voice Calls → Follow Up section*]
	**Hang up**: To disconnect the call, click **Hang Up**. The screen with additional fields such as **Disposition** and **Follow Up** will appear as shown below. Select the **Disposition** status from the drop-down list.
	**Call Transfer**: Agent can transfer the ongoing call to another agent if required by clicking the ***Transfer*** button. A popup will appear as shown below. Select the extension number and click ***Submit***. The call will be transferred to the selected agent.
	**Hold:** To place a call on hold, agent can click ***Hold***. Once the agent has placed the call on hold, the customer hears the call on hold music which indicates the call is still live. And the name of the button changes to ***Resume***.
	Clicking this icon will launch a separate web page outside of your call center software. This external webpage could be, for example, your company's CRM system, where you can enter additional customer details.
	 Enter the phone number in the given space and click on call icon to initial a manual dialing.

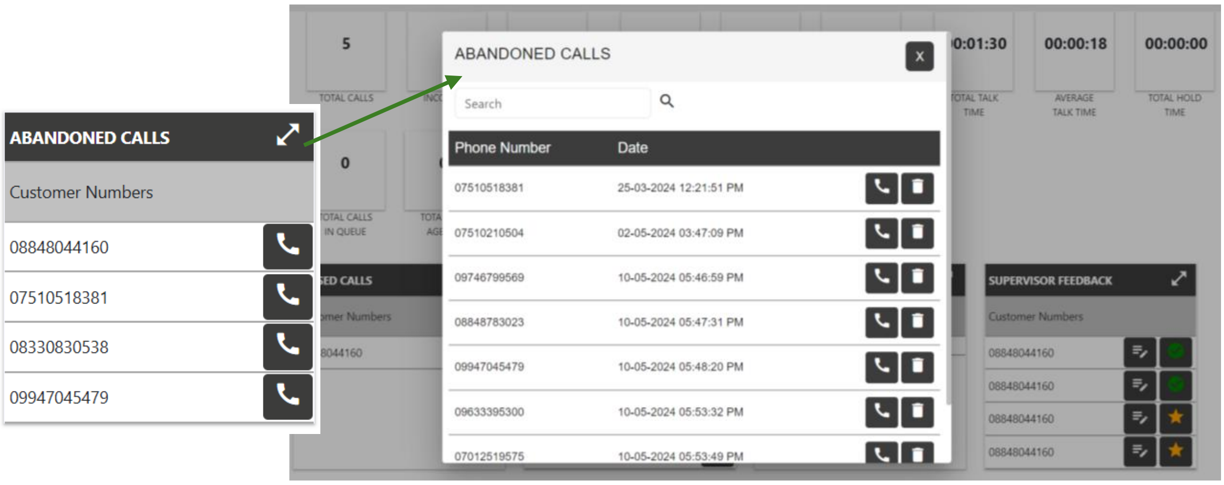
Missed Calls

This section shows all the missed calls you received in the present day. An agent can expand the window by clicking on the expand icon. Here you Initiate a callback to the missed number directly from this section. If a call is no longer relevant, you can easily delete it from the list by clicking on the ***Delete*** button.



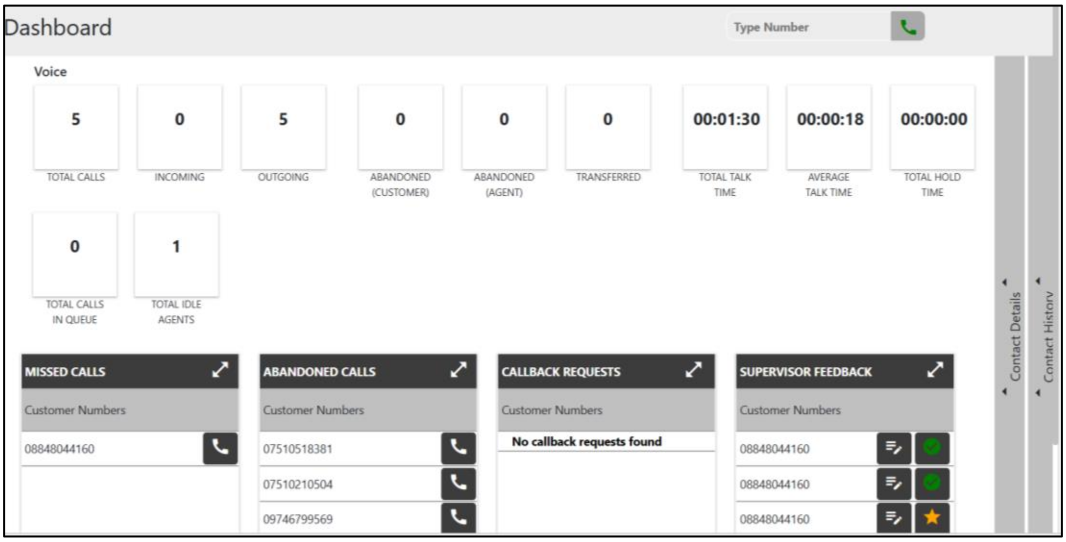
Abandoned Calls

This section shows all the abandoned calls received in the logged-in campaign. An agent can expand the window by clicking on the expand icon. Here you Initiate a callback to the missed number directly from this section and can delete if not relevant.



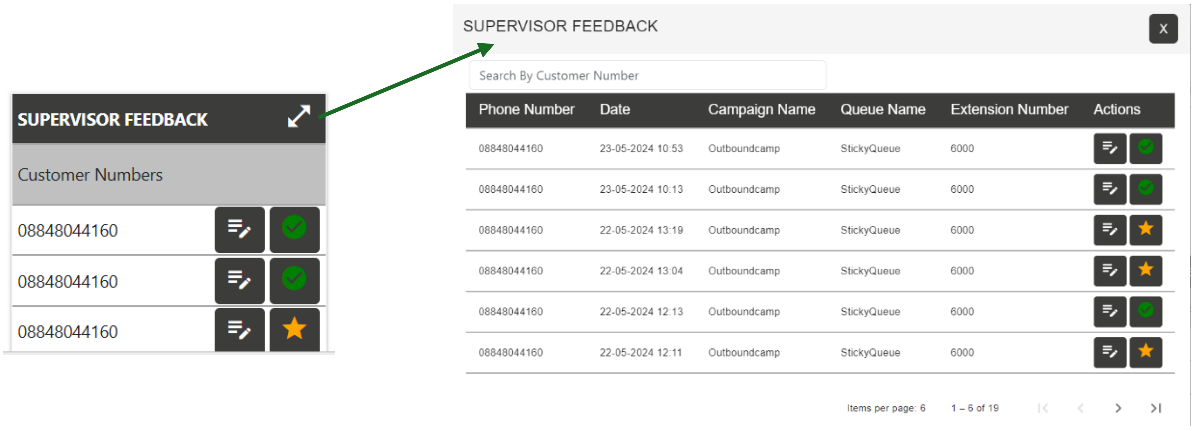
Callback Requests

Agent can view the list of customers who opted for the callback option. Click call icon corresponding to the number to initiate the callback.

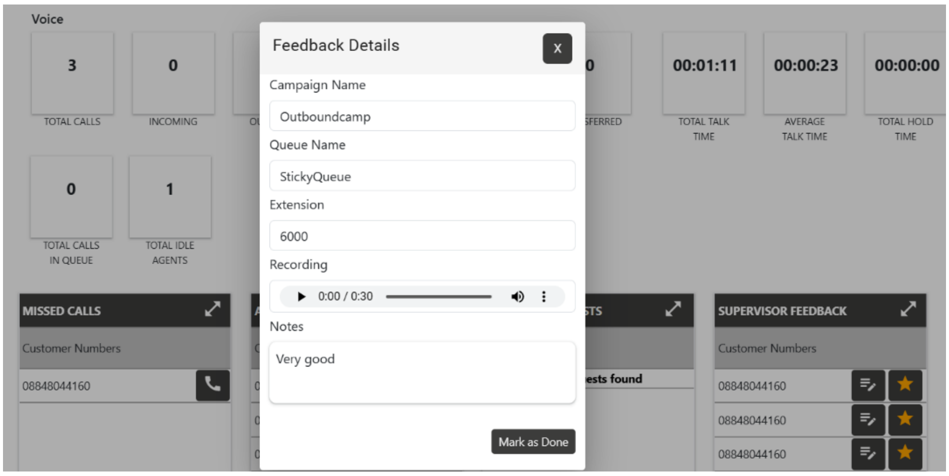


Supervisor Feedback

This section shows all the phone numbers for which you have received supervisor feedback on calls. An agent can expand the window by clicking on the expand icon.



To review the details of the call and the feedback itself, simply click the list icon next to the phone number. Once you have reviewed it, click "***Mark as Done***" to change the status from "not viewed" (indicated by a Star) to "Completed" (indicated by Tick).

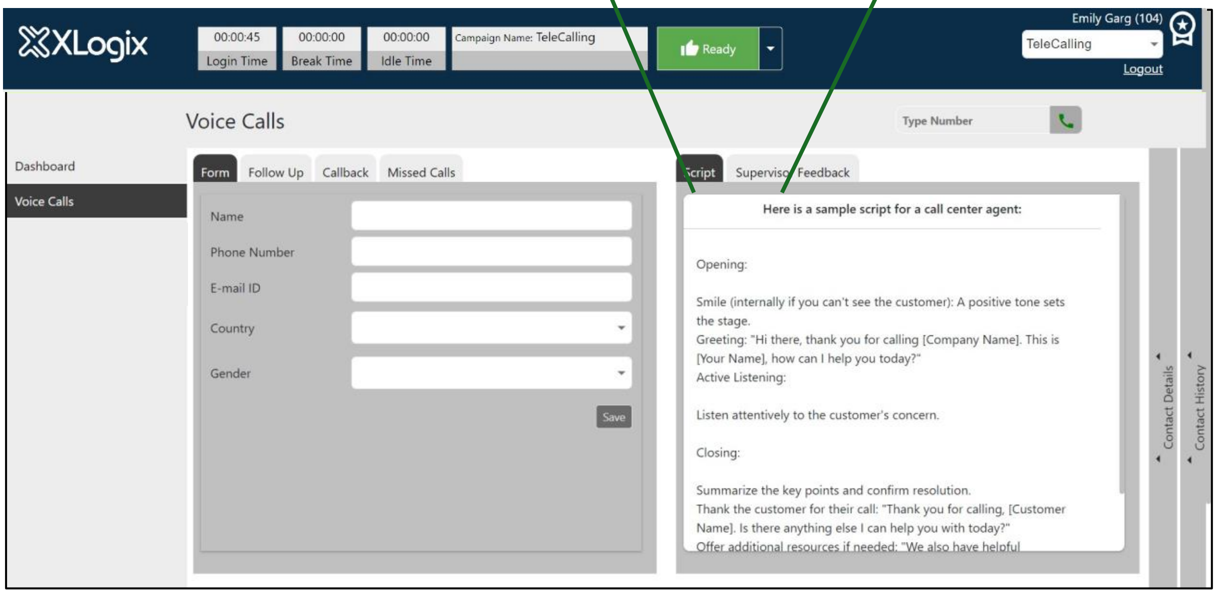


Voice Calls

It allows the agent to view the customer details as well as call details. The menu includes **Form**, **Follow Up**, **Callback**, and **Missed Calls**.

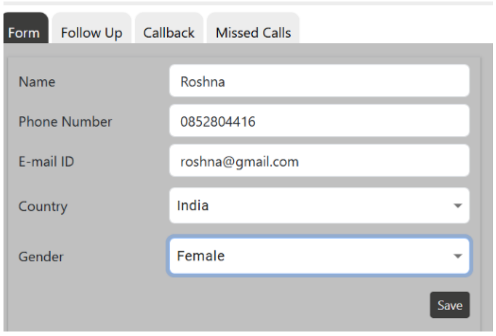
Allows an agent to view and follow the instructions provided by the supervisor.

Allows an agent to access and review feedback provided by the supervisor on specific calls.



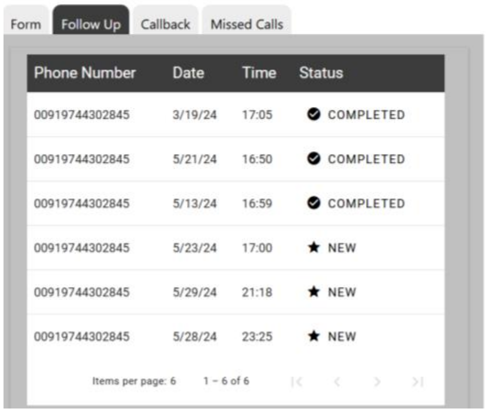
Form: Allows to add and store contact details of the customer during the call. Click on the **Form** tab, a screen will appear as shown below. Enter the details. Then, click ***Save***.

These details will be saved in the system and whenever a call lands, the details will appear on the agent screen.



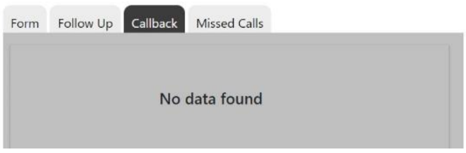
Follow Up: Allows an agent to view the follow-up call details. It includes the Phone number, Date, Time and Status.

Note: *The scheduled follow-up calls will be automatically dialed out through the same agent console on the specified date and time. In case, if the same agent is not ready/unavailable, the follow-up call will be automatically dialed out from the agent console who (agent) is ready and available.*

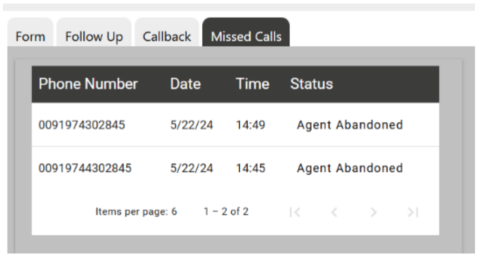


Phone Number	Date	Time	Status
00919744302845	3/19/24	17:05	COMPLETED
00919744302845	5/21/24	16:50	COMPLETED
00919744302845	5/13/24	16:59	COMPLETED
00919744302845	5/23/24	17:00	NEW
00919744302845	5/29/24	21:18	NEW
00919744302845	5/28/24	23:25	NEW

Callback: Allows an agent to view the list of customers who opted for the callback option.



Missed Call: Allows you to view a list of all missed calls and the following information for each missed call such as the Phone number of the caller, Date of the call, Time of the call and Status of the call.



Phone Number	Date	Time	Status
0091974302845	5/22/24	14:49	Agent Abandoned
00919744302845	5/22/24	14:45	Agent Abandoned

Conclusion

This concludes the contact center user guide that describes each and every elements of the GUI. The features and screenshots may vary depending on the version/feature update.

For more details, please do not hesitate to contact us.