Enabling you to connect®

Contact Center Agent | User Guide

Genesys Cloud

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Get Started (Agents)

Log in, complete your profile, and select a phone so others can call you and you can complete voice interactions. Change your personal settings and begin using PureCloud to collaborate with others in your organization.

Log in for the first time

Log in after you receive an invitation email or link from an administrator. You may want to bookmark your login page.

> **Note:** If you have not received your invitation email, check your Junk email folder for an email from no-reply@mypurecloud.com.

1. If needed, change the default language from the list in the lower right corner of the login page. You can change your language selection in user settings after you have logged in.
2. Enter your email address and new password, select your organization's region, and then click Log In.

> **Note:** If your admin chooses to configure PureCloud to authenticate with SSO only, PureCloud disables all password requirements.

After a successful login, the next time that you access PureCloud it opens automatically. If you do not access PureCloud for 20 or more days, PureCloud prompts you to reenter your credentials on your next login attempt.

Members of mulpitle organizations

If you use the same email address to log in to multiple organizations, you must enter an organization name when you log in. PureCloud may prompt you to enter an organization name. Or you can click More Login Options.

Organizations using single sign-on

If your administrator enables single sign-on (SSO), click More Login Options to enter the organization name and authenticate with the identity provider, for example, OneLogin. Once you PureCloud has authenticated you, you can log in automatically without entering your credentials.

Set your password

1. Click Forgot Your Password?
2. Type your account's email address, and click Reset Password. PureCloud sends you a password reset link to the email address you entered.

> **Note:** If you use the same email address to log on to multiple organizations, you must also enter the organization name when you reset your password. If you are not sure of your organization names, click Forgot Organization Name?

3. Check your email and click the password reset link in the email message from no-reply@mypurecloud.com. If you did not receive the password reset message, look in your Junk email folder or contact your administrator.
4. To reset your password, complete the fields. As you type the new password, PureCloud prompts you with changes to help you meet password requirements. The default

password requirements are as follows:

- The minimum length is eight characters.
- Passwords must contain at least one number, one special character, one uppercase letter, and one lowercase letter.
- The maximum length for a password is 400 characters

> **Note:** Your administrator may have established different minimum and maximum requirements for your organization.

5. After you complete the fields, click Reset Password.

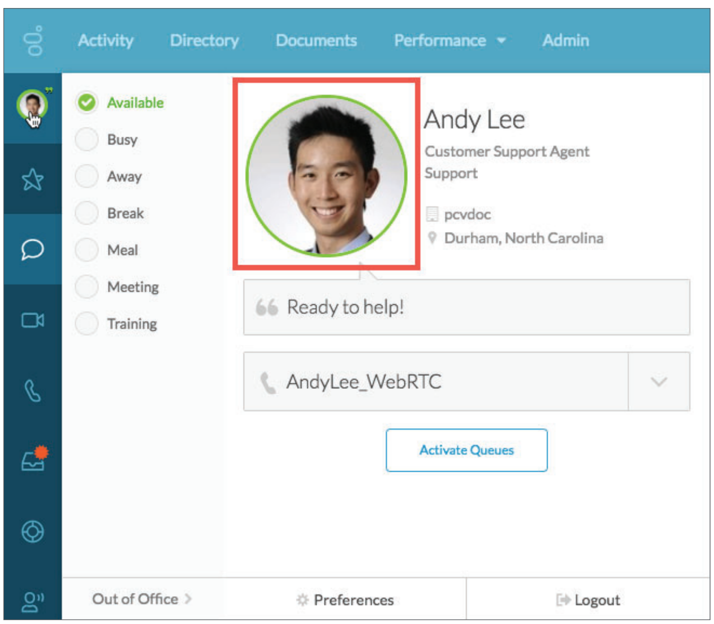
> **Note:** If your new password fails to meet your organization’s requirements, PureCloud sends you a message with suggested changes to help meet the requirements.

6. Log on with your new password.

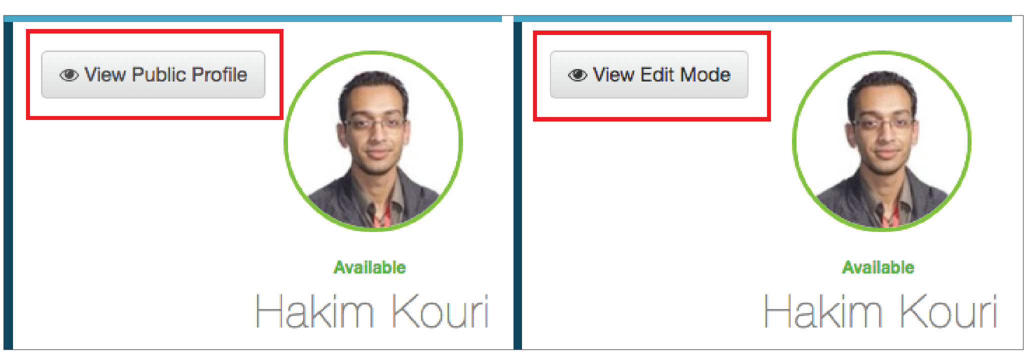
Complete your profile

Adding work-related information to your profile helps your coworkers find you using advanced search.

Click your profile picture in the sidebar, and then click the larger profile picture. You can also access your profile from the contact card that appears anywhere you see your profile picture.



Switch between public and edit views of your profile. To see how your profile looks to other users, click View Public Profile. To edit your profile, click View Edit Mode.



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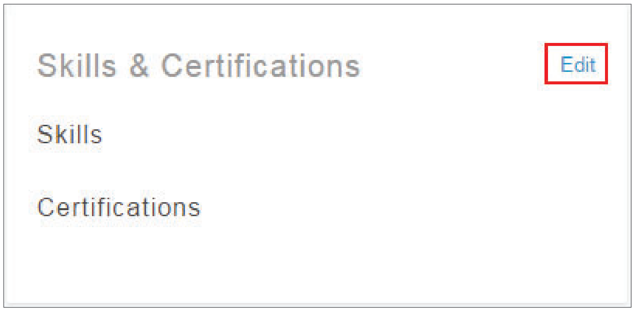
When you are in edit mode, click **Edit** in a section to change the information in that section.



In edit mode, you can make many customizations to your profile:

- Add a profile picture that others can see when they view your profile or contact card and during a chat or call.
- Set your contact options so others know how to contact you. Choose primary contacts so that calls and email messages go to your specified number or address when others click your contact buttons.
- Add sections to your profile to add more information to your profile.
- Add tags to your profile to help others find you by your skills and experience.
- Add your location so others know your location and your office location.

Note: The information that you can edit varies by organization.

Select a phone

To make and receive calls and voice interactions, select a phone. Select a different phone at any time. You can select and change your phone from the Calls panel or from User settings.

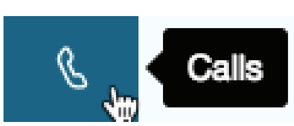
Prerequisites: Conversation > Call > Add permission (included in the Communicate – User role).

To make and receive calls, select a phone from the Calls panel. You can also select and change your phone from User settings.

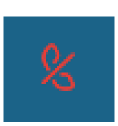
Note: If you choose a different primary number on your profile than the work number assigned to you by an administrator, then incoming calls do not go to your selected phone. Incoming calls instead go to your primary number. You still use your selected phone to place outbound calls.

When you initially log in, or if your selected phone becomes disassociated, Calls indicates that you do not have a selected phone and prompts you to select a phone.

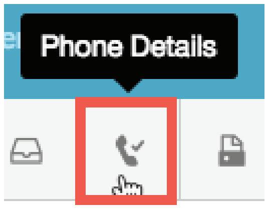
1. Click the Calls tab.

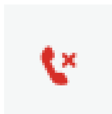
   If you do not currently have a phone selected, the icon is red.

2. In the Calls panel, click **Phone Details**.

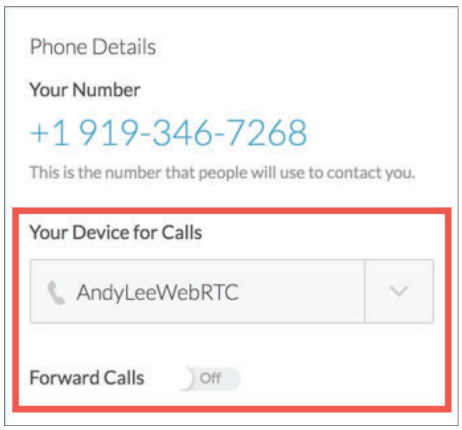


If you do not currently have a phone selected, the icon is red and has an x.

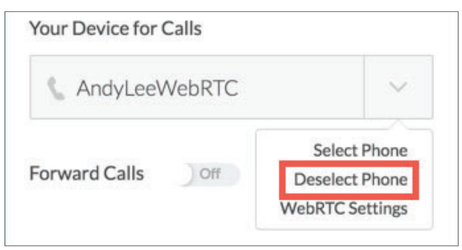


The Phone Details panel opens.

3. In the box under, **Your device for calls**, begin typing the phone name in the Search box and select it from the suggestion menu.



4. (Optionally) To cancel a phone selection, click the phone name and select Deselect



Note: If you do not know which phone to select or do not see your phone, contact your administrator. If you are an administrator, see Phones overview for more information about setting up phones.

Stand-alone phones do not appear in the suggestion list.

Select and configure the PureCloud WebRTC phone

Prerequisites

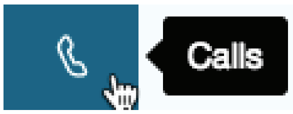
- **Conversation > Call > Add** permission (included in the **Communicate – User** role)
- A PureCloud WebRTC phone created for you by a telephony administrator

The PureCloud WebRTC phone allows you to make and receive calls using the PureCloud app and WebRTC technology. You do not need a physical phone or a downloaded softphone to call with the PureCloud WebRTC phone.

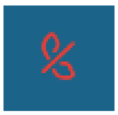
> **Note:**Genesys supports the PureCloud WebRTC phone in the desktop app and in the web app with the supported browsers as noted in the PureCloud system requirements.

Select the PureCloud WebRTC phone as your phone

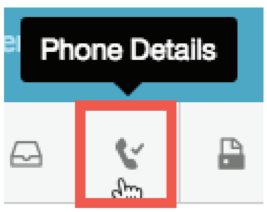
1. From the sidebar, click **Calls** to open the Calls panel.



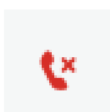
If you do not currently have a phone selected, the Calls icon is red.



2. Click **Phone Details.**



If you have not selected a phone, the Phone Details icon appears red with an.

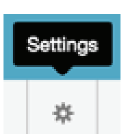


3. Type the PureCloud WebRTC phone name in the **Search for phone** field.
4. Select your phone from the suggestions displayed.

> **Note:**Only users with telephony admin permissions can create a PureCloud WebRTC phone. Contact your IT department or administrator if you do not have a PureCloud WebRTC phone assigned.

Configure the PureCloud WebRTC phone settings

1. From the Calls panel, select **Settings.**



2. Enable the Placing calls with another app? feature if you want to make and answer calls in a third-party application

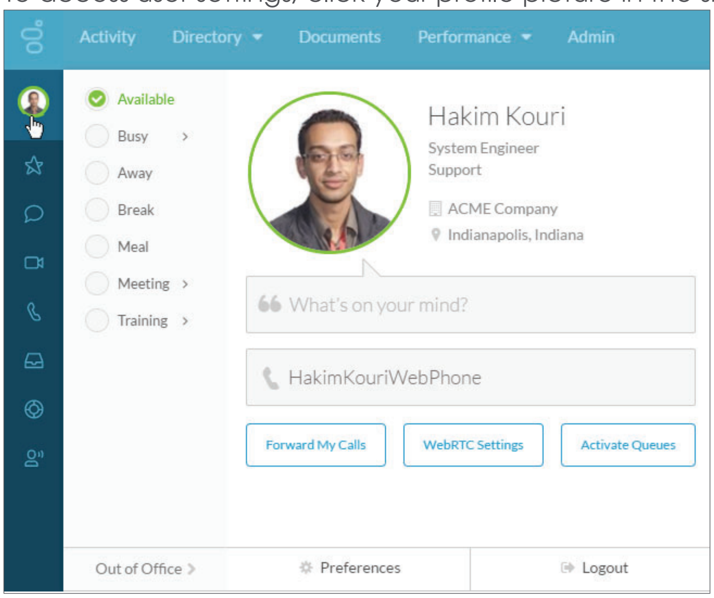
> **Note:** Close other browser app instances when making and answering calls in a third-party application. If you require other instances, disable this feature in those instances.

3. Under Audio Controls, select your audio profile, or use your computer's default settings.
4. To test and adjust the output volume, click Device Volumes and then Sound. You can also access Sound preferences in User settings.
5. If you have problems with a call, click Run diagnostics to check your microphone, connectivity, and throughput for problems. If the test finds no issues, contact your IT department for more help.

Note: For the best phone experience, use a high-quality phone headset with your computer. Use your normal computer audio settings to adjust your audio.

User settings

To access user settings, click your profile picture in the sidebar.



Settings	To configure
View your profile	To view and customize your profile, click the larger profile picture. For more information, see Profile page.
Set your presence status	Select your presence and status. Presence indicators appear as colored rings around profile pictures. Presence appears as the following: • Green for Available • Red for Busy • Yellow for Away • Yellow for Break • Yellow for Meal • Red for Meeting • Yellow for Training • Pink for Out of Office For more information, see Change presence and status.

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Settings	To configure
View your organization name	Your organization name appears next to the building icon. If you are member of more than one organization, PureCloud also shows the name of the organization you are currently logged into.
Share your current location	The geolocation indicator under your name and title lets others know your current location. If the administrator enabled geolocation for your organization, you can choose to share your current location with others. • To enable PureCloud to share your location in the Windows desktop app, click Preferences and then click the General tab. • In the Mac desktop app, Apple Location Services manages geolocation. For more information, see Share your current location. • In the browser app, the web browser manages your location setting. For more information, see Share your current location.
Add a custom message	To provide additional information about your presence, status, or location, for example, "Back at noon," Type a brief message next to the quote icon.
Select your phone	To make and receive calls or to select a different phone, select a phone. Type the phone name in the Search field next to the phone icon and select it from the suggestion menu.
Forward your calls	To enable call forwarding and to configure a forwarding number, click Forward My Calls.
Select your PureCloud WebRTC phone settings	To select your microphone and speaker if you selected a PureCloud WebRTC phone, select WebRTC Settings.
Choose queues to work	To access the Active and Available Queues lists and to specify queues, click Activate Queues. This setting applies to agents.
View time elapsed in your current status	Keep track of the time spent on breaks and lunches. This setting applies to agents.
Set Out of Office status	To provide a start date and time for periods you are away, click Out of Office. Optionally, include the end date and time.
Access your preferences	To customize your preferences for sound, notifications, chat, password, voicemail PIN, and language options, click Preferences. Some preferences are specific to the app you are using (browser, Windows desktop, or Mac desktop).
Log out	To log out of PureCloud, click Logout.

Begin collaborating

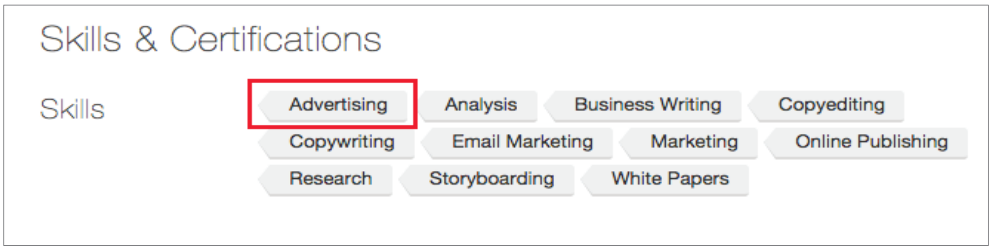
Find and work with the people you need.

Search

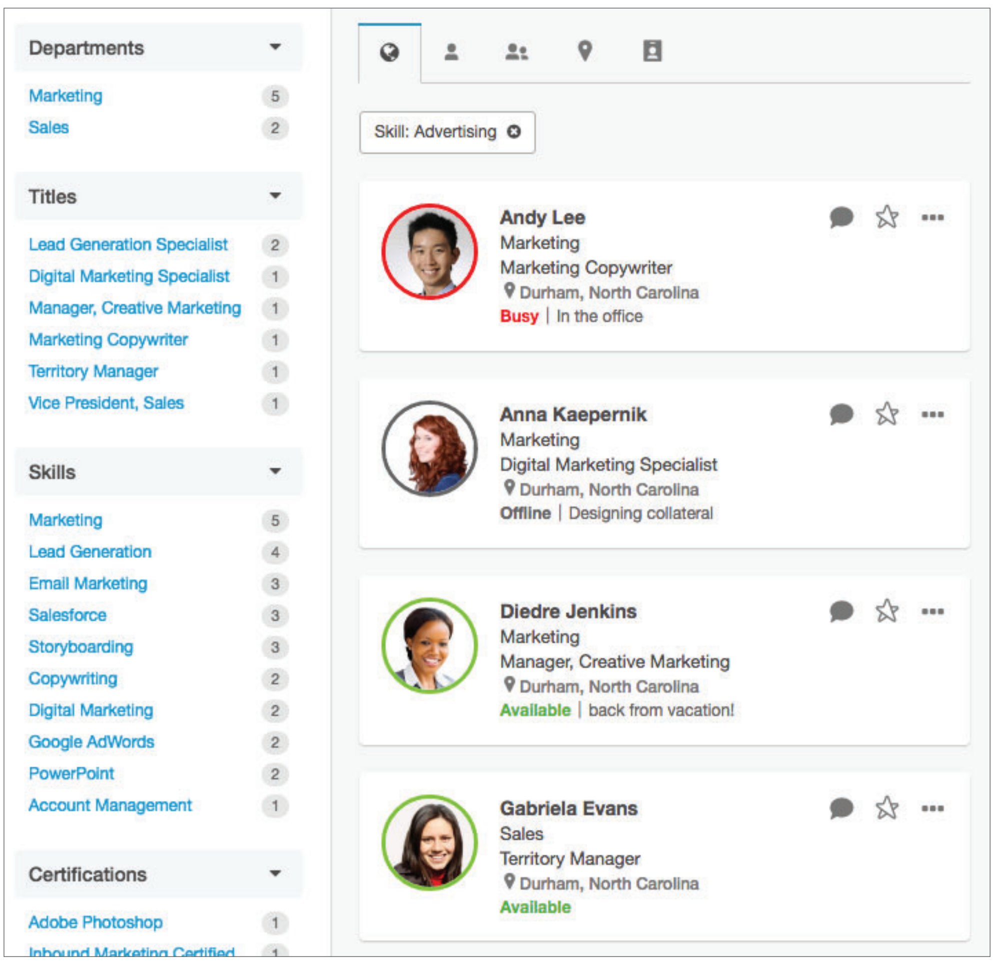
Use advanced search to find someone using their profile information.

Search using profile tags - When you want to find out who in your organization shares the same tags, start a search from a profile page.

1. Go to a profile page and click a tag



2. View the results list or click the category links on the left to filter the results.



Chat

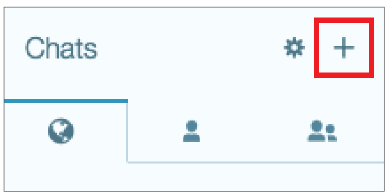
Start a one-to-one or group chat conversation.

Start a chat - Send instant messages to a single recipient or to a group of people within your organization. You can start a chat with one person and then add other people to your conversation to create a personal group. Or find and chat with a group to ask a question, make an announcement, or monitor a group discussion.

<u>Start a chat with Chat icon</u>
Start a one-on-one or group chat anywhere you see the Chat icon: a profile, a group profile, your Favorites list, search results, and more. Click the Chat icon and send a chat.
Video chat.

Note: Chat conversations are permanent and cannot be deleted.

<u>Start a chat from the chat panel</u>
You can start chatting with a person or an official group, or create a personal group from the chat panel.



Click the Start chatting or create your own group icon and select the type of chat to start:

- **Find Person**: To chat with a person, type a name in the search field. When you select the name you want from the search results, PureCloud creates the chat room. You are ready to chat.
- **Find Official Group**: To chat with an official group, type a group name in the search field. When you select the name of the group from the search results, the chat room opens and is ready for a chat.
- **Start a Personal Group**: To start a personal group chat, type a name for your group in the Group Details field, and search for participants in the Invite People Search field. After you invite people to your personal group, click Create Group. The chat room opens. For more information about starting a personal group, see Create a chat room.

Note: Note the following when chatting with groups:
- Some groups are hidden due to group privacy settings. Groups that are not public are visible only to group members and owners.
- Group chat history is persistent. Anyone who is added to the group can view the entire group chat history back to the creation of the group.
- Chat conversations are permanent and cannot be deleted.

<u>Continue an active conversation</u>
1. In the side bar, select the Chat icon to expand the chat panel.

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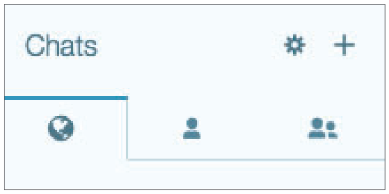
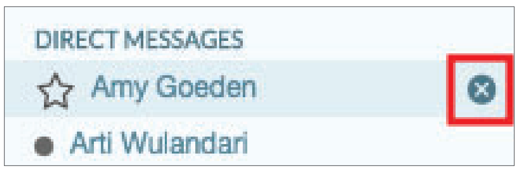
2. Choose how you would like to view the list of chats by selecting one of the following tabs: All, People, or Groups.



3. Select a chat in one of these categories to open it.

- Favorites: lists the people and groups you have favorites
- Direct messages: one-on-one chats
- Official groups: groups created by group admins
- Personal groups: on demand groups created in the chat panel
- Recently closed: chat rooms that are recently closed

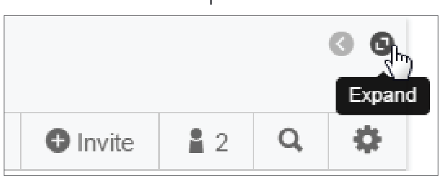
4. Close the chat by clicking the x next to the chat room name.



The chat room moves to the Recently Closed category. To reopen the chat, select the chat name again.

<u>Expand or hide the chat panel</u>
You can expand the chat panel to the full width of the desktop app or browser window or hide the chat panel.

To expand the chat panel, click the Expand icon. The Expand icon is only available when the window is expandable.



To make the chat panel smaller, click the Collapse icon.

To display the chat panel again, click the Chat icon.

<u>Close a chat</u>
To remove a group or one-to-one chat from your conversation list by clicking the “X” that appears when you hover the mouse pointer over the chat.

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The chat moves to Recently Closed where you can click to reopen it for a limited time.

Notes:

-When you close a chat, you stop receiving notifications for it. However, if it is a group chat and you are a member of that group, the chat reappears whenever there is a new chat.

-Chat conversations are permanent and cannot be deleted. When you close a chat conversation, PureCloud moves the chat conversation to Recently Closed, which lists the 20 most recently closed conversations. You cannot manually clear the Recently Closed list. Older chats fall off the list as you add newer ones.

Notes:

-When you try to join a group chat room that is full, you can only browse the group chat's history. You cannot join the chat, post messages, or search chat history until other users leave the chat room.

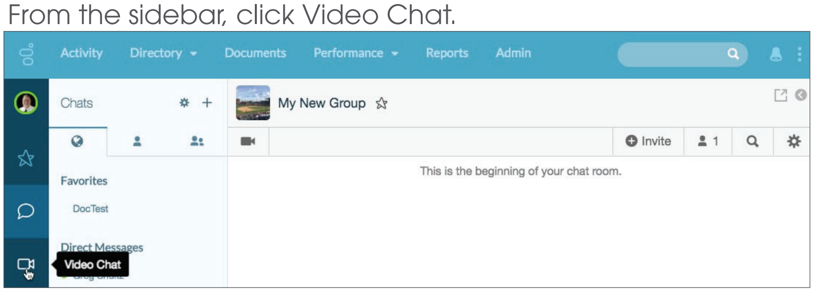
-Chat conversations are permanent and cannot be manually deleted.

Video chat

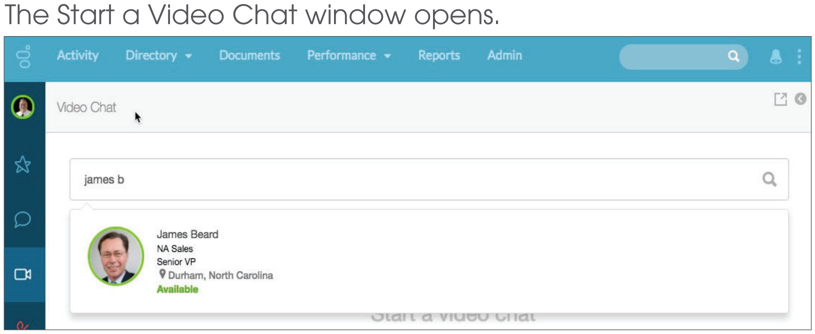
Start a one-to-one or group video chat. Share your screen with participants.

<u>Start a video chat from the sidebar and invite participants.</u>

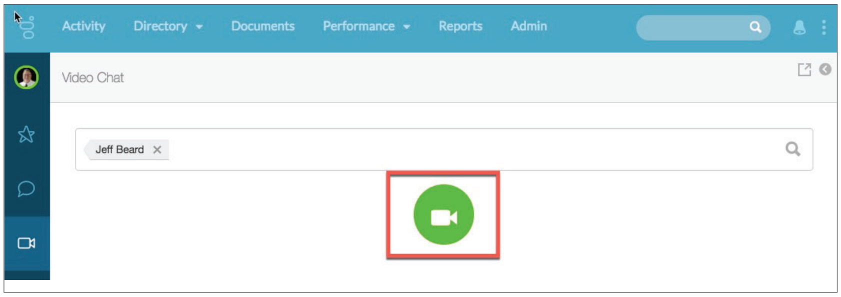
1. From the sidebar, click Video Chat.



The Start a Video Chat window opens.

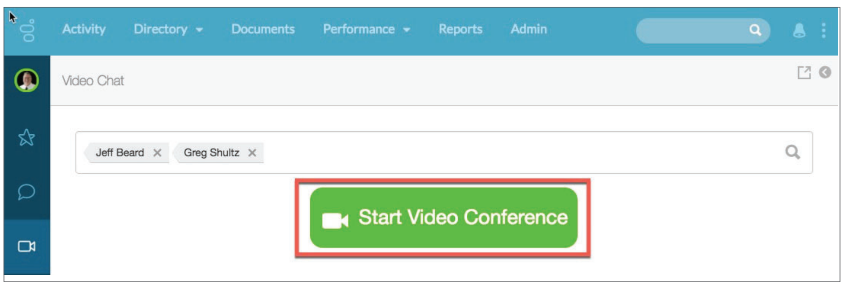


2. To invite someone to join your video chat, type a name in the search field and select the name from the results. Repeat this step to add up to five participants.
3. If you choose one person, click Video Chat.

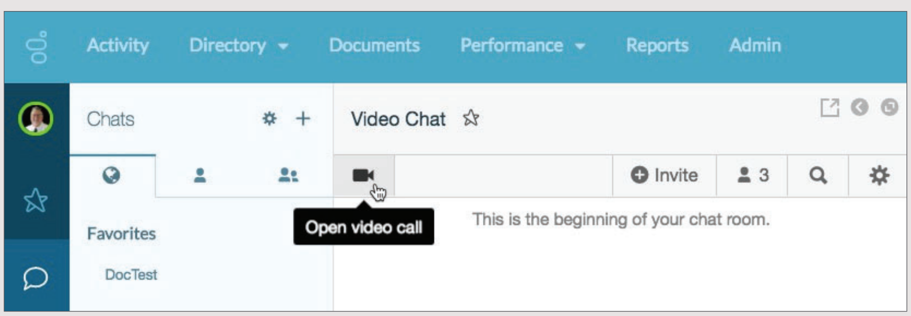


Note: In a one-to-one video chat, the participant recieves a video chat request and accepts the request by clicking Video Chat. Participants can decline an invitation by clicking 'x'.

4. If you invite two or more participants, click Start Video Conference.



Note: If you invite more than one participant, PureCloud creates a new chat room under Personal Groups. Participants join the video conference by clicking Open Video Call above the chat area.

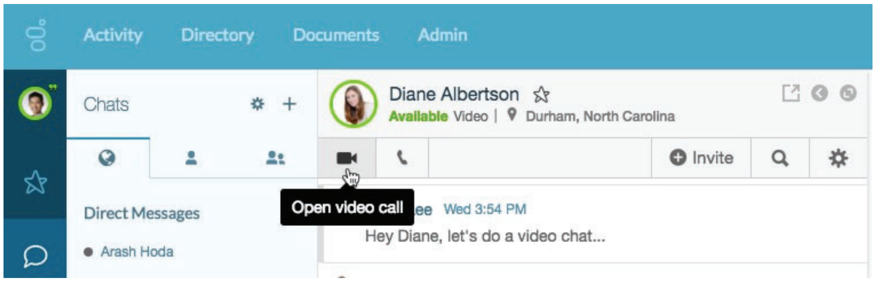


5. To notify participants, mention them in the new chat room by using the @ symbol before their names as you would in a text chat.

The participant's video feed appears, offering an opportunity to adjust the camera. Participants join the video chat or conference by clicking Join.

<u>Start a video chat from the Chat Panel</u>
Start a video chat with a person, an official group, or a personal group.

1. Under Chats, select a person, official group, or personal group. You can also click to create a new personal group.
2. Above the chat area, click Open video call.



Your video feed opens.

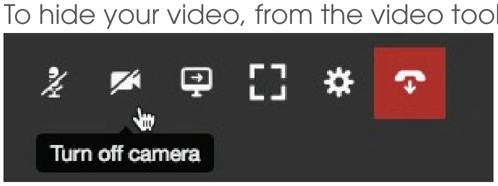
3. Click Join when you are ready to join the video chat. Other participants join by following the same steps.

> **Note:** In a one-to-one video chat, the other participant receives a notification inviting them to join. Notification is not sent for video chats with three or more participants.

Turn off your camera

During a video chat, you can turn off your camera so that others cannot see your video feed. PureCloud shows your profile picture in place of your video feed.

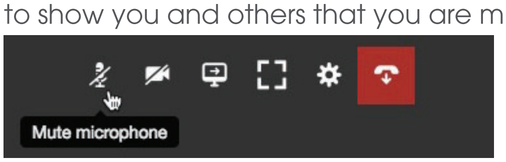
To hide your video, from the video toolbar, click Turn off camera.



The icon turns red to indicate that the camera is off.

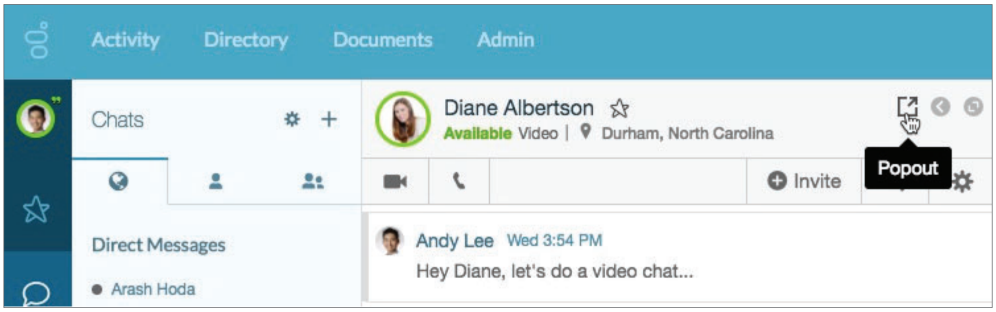
Mute your microphone

During a video chat, you can mute your microphone so that others cannot hear you. PureCloud places a red microphone symbol on your video thumbnail in the video chat room to show you and others that you are muted.

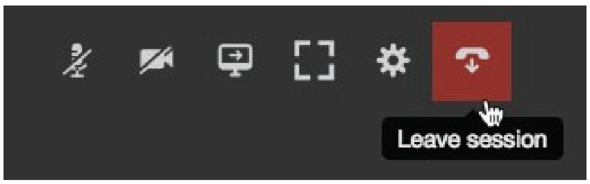


The icon turns red to indicate that the microphone is off.

View video chat in a new window, click Popout



Close a video chat
To end a video chat, from the video toolbar, click Leave session.



Make a call

Use PureCloud to make a phone call from your desk phone or the PureCloud WebRTC phone.

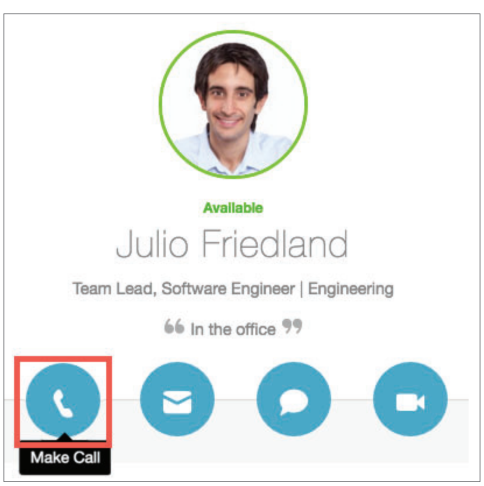
> **Note:** The following procedures describe how to place standard business calls. If you are a contact center agent or placing calls on behalf of a queue, then see Voice interactions for agents overview for more information about placing and receiving calls through a queue.

Call someone in your organization

> **Note:** A call to or from someone in your organization automatically opens a chat room in the Chat panel.

To start a phone call from either of the following places, click Make Call.

Profiles



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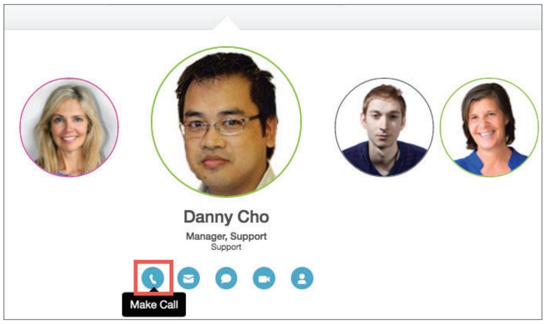
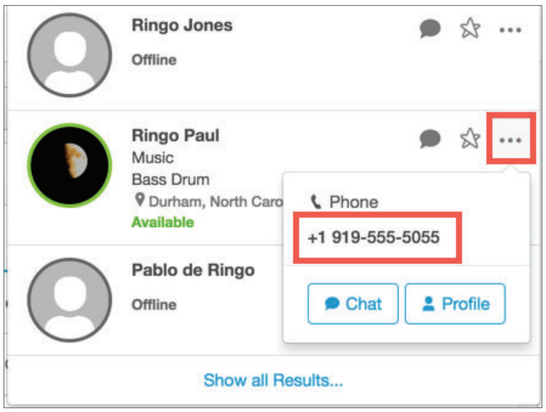
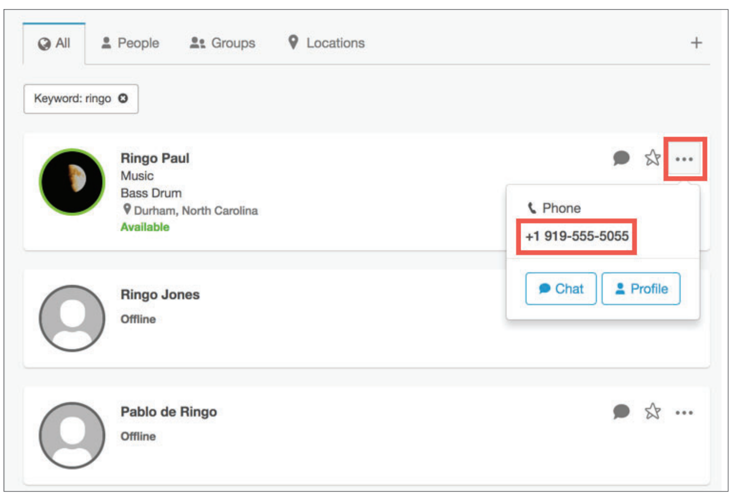


To start a phone call from either of the following places, click ••• and the number.

Search suggestions

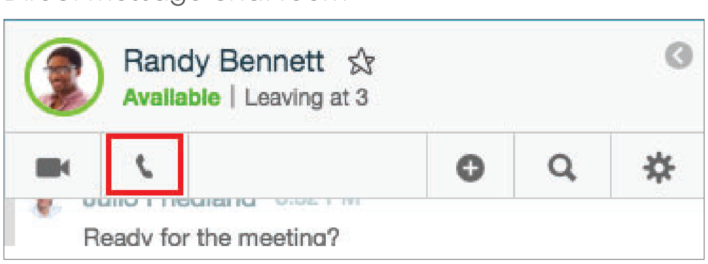


Directory and search results



To start a call from a direct message chat room, click Call.

Direct message chat room



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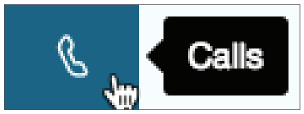
Make a call using the Dialpad

1. To open the Calls panel, click Calls.



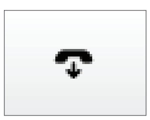
2. Click Dialpad

3. Start typing a name or phone number in the Enter Names and Numbers field; PureCloud displays contacts that match the entered characters. Select a contact from the list, or continue typing the full number. Press Enter.

> **Note:** A call to or from someone in your organization automatically opens a chat room in the Chat panel.

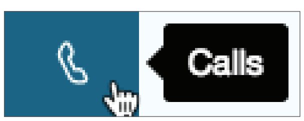
4. To start the call, click the Call button or press Enter again.

5. To end the call, click the End Call button.

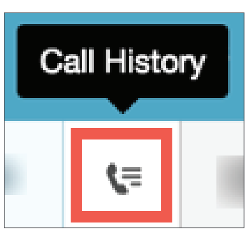


Make a call from your Call History

1. Expand the Calls panel by clicking Calls.



2. Click the Call History tab.



3. Click the Call icon for the person you want to call back to start the call.

To call someone in your organization at a phone number that is not their primary contact number, select More options and select a phone number you want to call.

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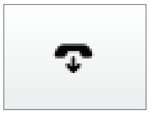
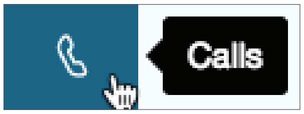
4. To end the call, click the End Call button.



Call an external contact.

Call a person or company outside your organization that someone has made a contact.

1. To open the Calls panel, click Calls.



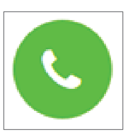
2. Click the Dialpad.

3. Start typing the name of the external contact you want to call into the Enter Names and Numbers box.

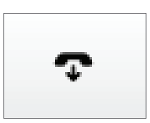
Note: Use the full phone number. PureCloud does not support extension-only numbers.

4. Select the contact from the suggestions displayed. External contacts have a hexagonal profile icon.

5. To start the call, click the Call button.



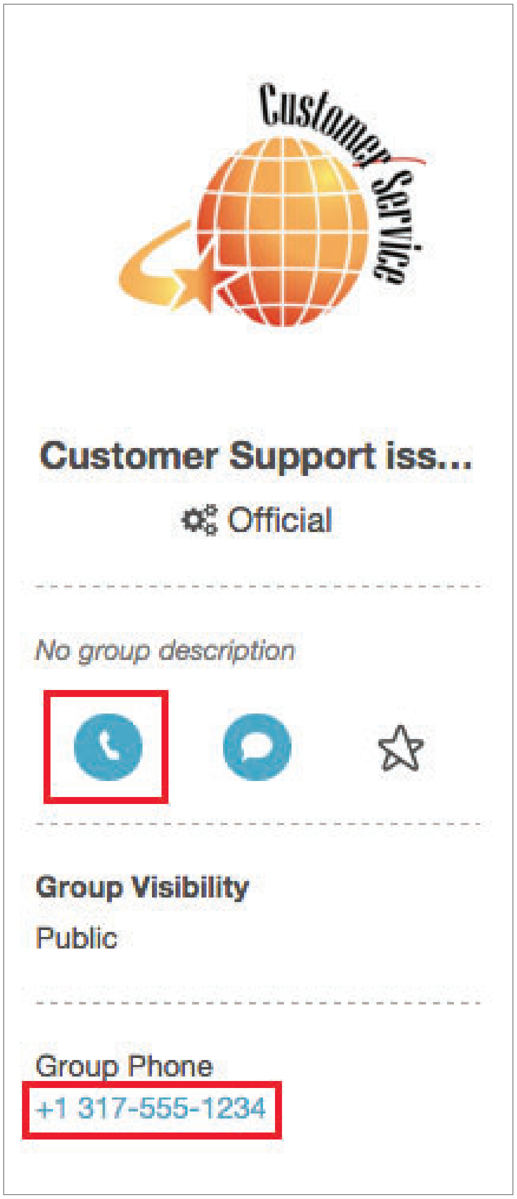
6. To end the call, click the End Call button.



Call a group

If a group has a group phone number, you can call the group number and contact a group member. When you call a group, PureCloud alerts 15 random members at a time until someone answers, the call times-out, or it has alerted all members. Once you connect with a member, a direct message chat room with that person opens in the Calls panel. The chat room also appears in the chat panel.

To call a group, select the group number in the group's profile or select the calls icon in the group's profile, from search suggestions, or from the Directory.



You can also dial the group's number from the dialpad or from a phone not connected to PureCloud.

> **Note:** Use the full phone number. PureCloud does not support extension-only numbers.

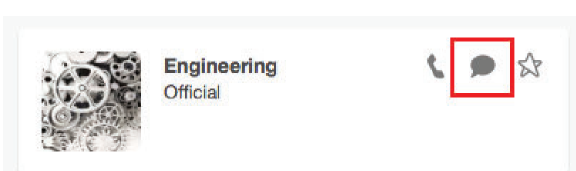
Participate in group chats

Monitor and participate in group chat conversations.

If you are a member of a group, by default, you automatically receive all notifications for that group's chatroom. If you are not a member of a specific group, you can participate in group chat conversations by joining the group's chat room.

> **Note:** Some groups are private, which makes them invisible to you unless you are a member or someone invites you to the chat room.

To join a group's chat room, click the chat icon for the group. The group's chat icon appears in search results, in the Directory, and on the group's profile page.



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The group opens in the chat window, and PureCloud adds the groups chat room to your chat roster.

To leave the group chat room, hover over the group name in the chat roster and click the close button.

Note: When you join a public group chat room, only you can remove yourself from the chat room by closing the conversation. If you are a member of a group, the room reopens in your chat roster when anyone posts a new chat message in the room.

Note:
- When you try to join a group chat room that is full, you can only browse the group chat's history. You cannot join the chat, post messages, or search chat history until other users leave the chat room.
- Chat conversations are permanent and cannot be manually deleted.

Upload files

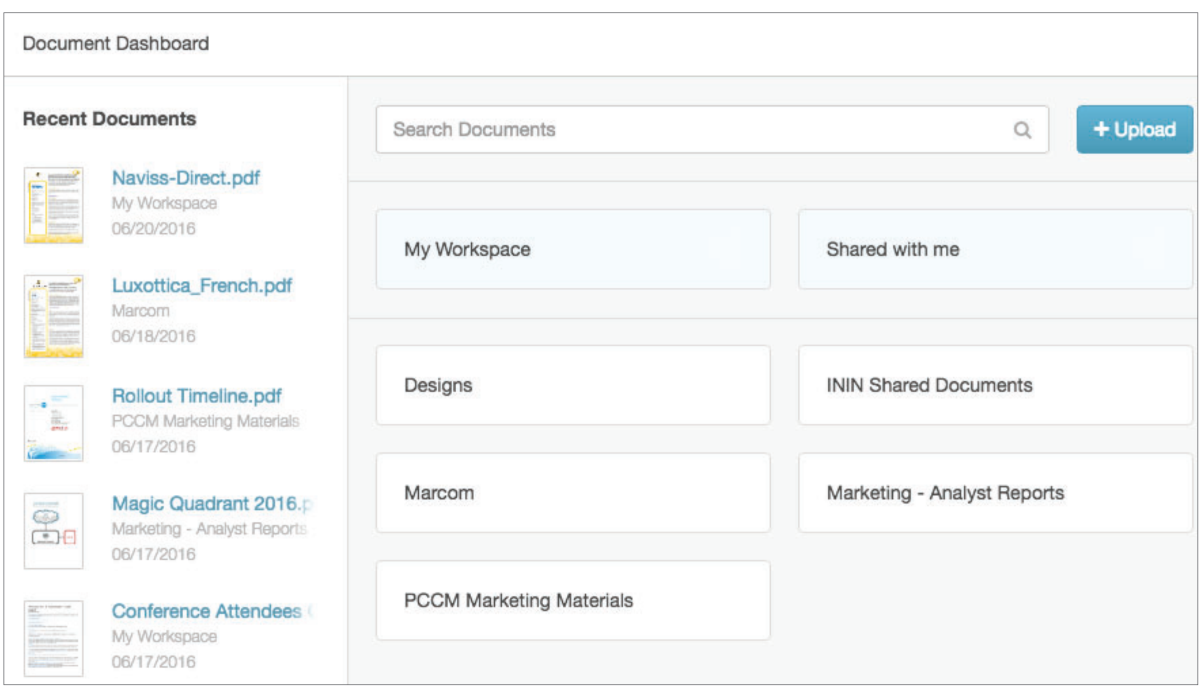
Begin storing documents, images, faxes, videos, and more, in your personal workspace or group workspaces.

<u>Documents Dashboard</u>

In Documents, the Document Dashboard is the first page you see. You use the Document Dashboard to:

- View the workspaces that organize your files
- Open your personal workspace
- Search for files across all your workspaces
- See the list of files that you have recently uploaded or edited

Prerequisite: You must have the Employee role or any role with the Content_management _user permission.

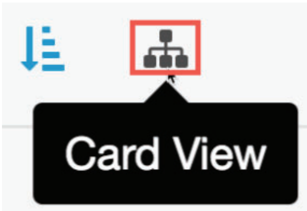


Browse your reporting structure

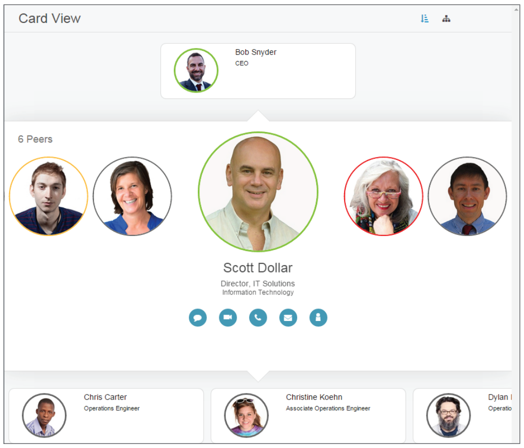
Navigate your organization in hierarchy views.

Card View shows a person's relationships as rotating cards arranged by reporting structure.

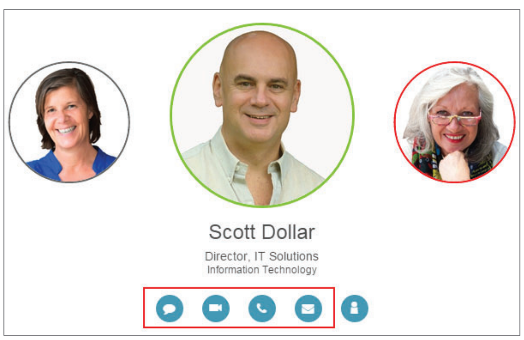
To open Card View, click Card View at the top of a person's profile page.



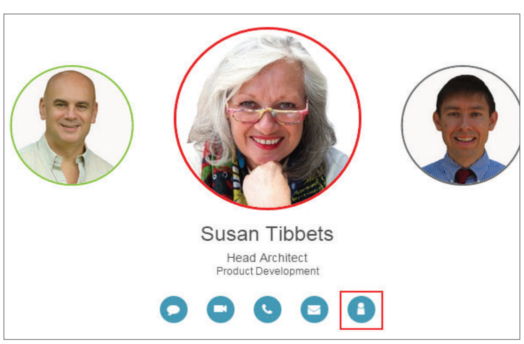
Navigate Card View using the arrow keys on your keyboard or by clicking the mouse.



Contact people by clicking the icons on the person in focus to chat, video chat, call, or email.



Find out more about someone by visiting their profile page.



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Check your recent activity

See a summary of the notifications you received since the last time you logged in to Collaborate.

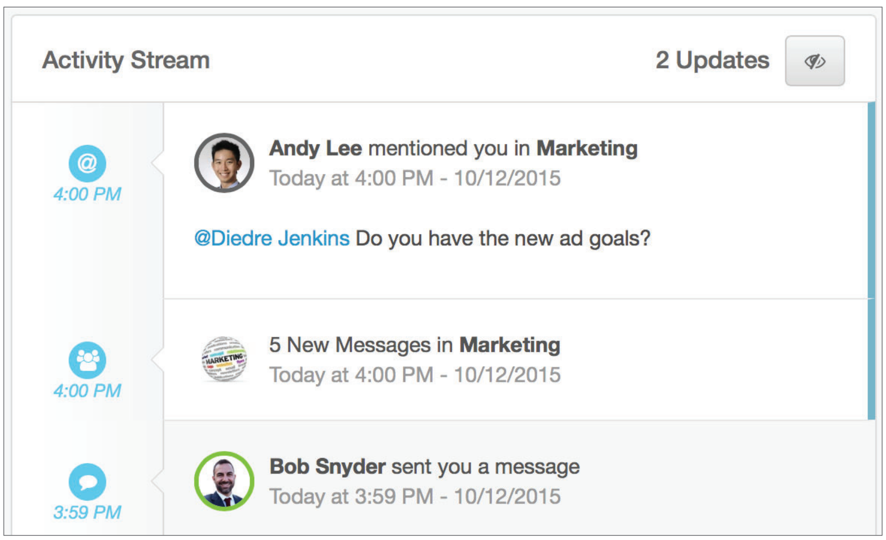
The activity stream provides a summary of all the notifications you receive and a count of all new or unacknowledged notifications:

- One-to-one chat messages
- Group chat messages
- Instances when someone uses the @ symbol to mention you in a chat message
- New and updated documents
- Missed calls
- Voicemail messages

<u>View the activity stream</u>

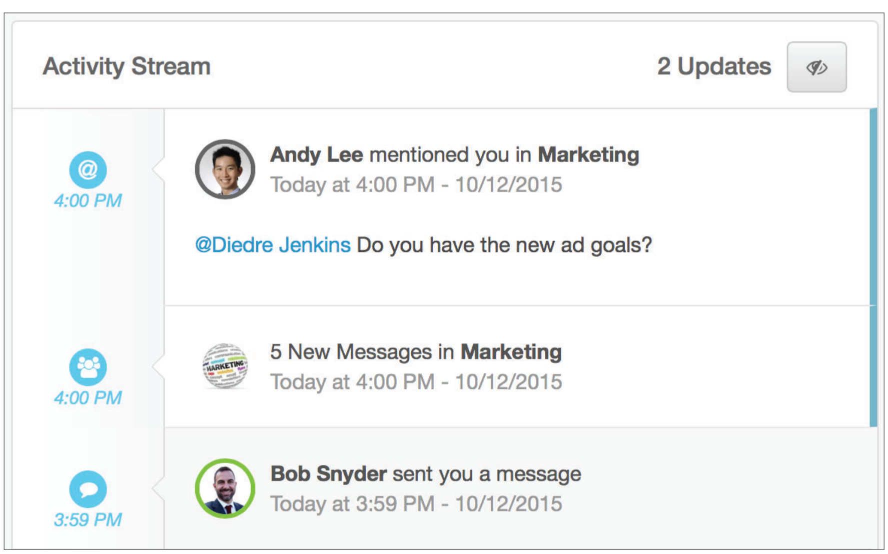
1. Click Activity

2. The activity stream shows the total number of new notifications and a list of recent notifications with time stamps.



<u>View an item in the Activity Stream</u>

1. Select an item in the Activity Stream



2. PureCloud opens the appropriate chat room or other location for your review.

3. To return to the activity stream, click Activity.

<u>Acknowledge all activity and clear the update count</u>
Each new item in the activity stream has a white background and increments the updates count at the top of the activity stream. When you select or respond to items, the background becomes shaded and the update count decreases.

To reset the update count and acknowledge all items as seen without selecting each item, click Acknowledge All Activity.

Acknowledge All Activity becomes Clear Events. And the acknowledged items remain in your activity stream until you click Clear Events, log out, or refresh the app or browser.

If you have no new activity, the Acknowledge All Activity button and update count do not appear. Instead, the Clear Events button appears. Click Clear Events to clear all past activity in your activity stream.

Add favorites

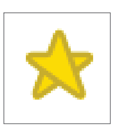
Add a person or group to your Favorites list.

To find and communicate quickly with the people and groups you contact most often, add them as favorites.

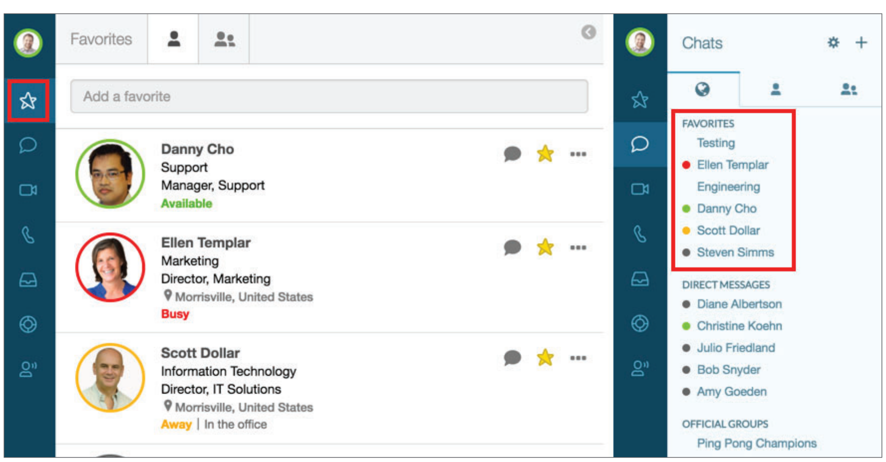
Click the star anywhere you see it:

- On a contact card
- On a profile page
- At the top of a chat window
- Beside a chat room name in the chat roster list, and more

Click the star again to remove a favorite.



Your favorites appear in the Favorites panel and, when you start a chat with them, at the beginning of your chat roster.



Add favorites in the Favories panel

You can also add favorite people and groups in the Favorites panel.

1. To open the Favorites panel, click Favorites.

2. To favorite a person, click the People tab and begin typing a name. From the results list, select the person to add to your Favorites list.

3. To favorite a group, click the Groups tab and begin typing a group name. From the results list, select the group to add to your Favorites list.

Note:
- You cannot add personal groups to your favorites from the Favorites panel. You can add personal groups to your favorites by clicking the star beside the chat room's name.

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Prepare for Interactions

Learn about presence and status for agents, choose which queues to work, and go on queue to accept interactions.

Add an agent name and image for web chats

Prerequesites:

- PureCloud 2 or PureCloud 3 license
- Directory > User > Edit Permission
- Directory > User > View permission

You can set a name and image to use as an alias during web chat interactions. Customers who are interacting with you over web chat see the alias name and image.

You can also add detailed information for internal users with Profiles.

Note:

- Many companies have policies about the names and images that agents use. For more information about your company's policies, consult your manager.
- Your administrator can create canned responses that include your agent name as your alias. For example, your email signature can automatically include your agent name.

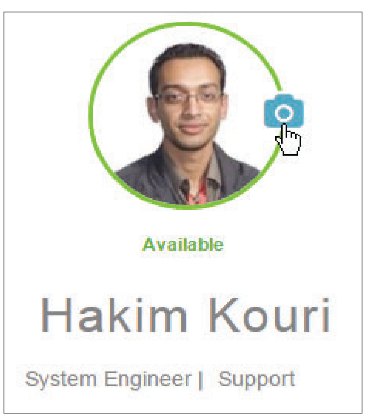
Add an agent name for chat interactions

1. From the edit mode in your profile, click Add new section.
2. Click the person_agent section.
3. In the new person_agent section click Edit.
4. In the name box, type a name to display to customers during ACD interactions.
5. Click Save.

Note: The agent name can also be used in canned responses for chat and other ACD interactions.

Add an agent image for web chat interactions

1. From the edit mode in your profile, click the camera icon.



2. Click Agent Image.
3. Click Upload.
4. To add a picture from your computer, click browse.

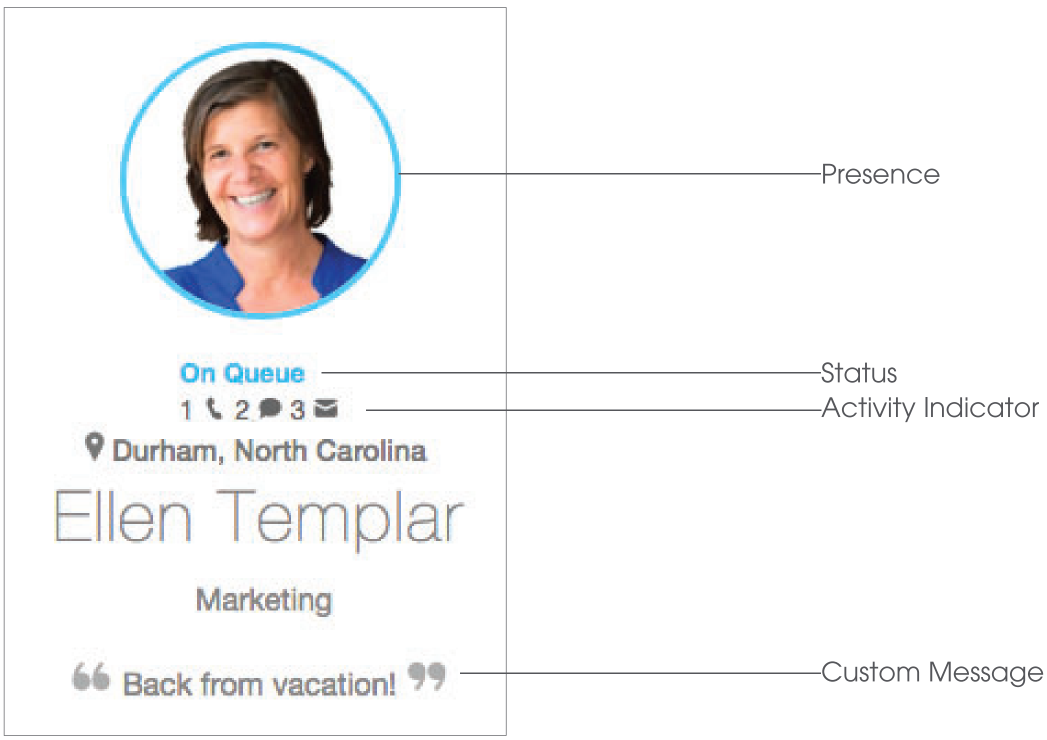
5. Select the image file you want to use, and click Open.
6. Adjust the border to size your picture, and click Upload image.
7. Click Done.

Agent presence and status

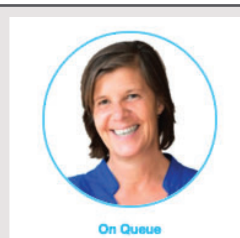
<u>Agent preseence, status, and activity indicators</u>
All users can change their status to Available, Busy, Away, Break, Meal, Meeting, Training, or Out of Office. These statuses determine whether PureCloud sends a user's incoming calls to voicemail. For more information about these statuses, see Presence, status, and activity indicators.

These additional features are specific to agents:

- Agents can change their status to On Queue to allow them to accept interactions.
- Agents can see the time elapsed in the status indicator for their current status.
- Agents' presence and status also factor into reports. These reports enable supervisors to see how long agents are on queue, handling interactions, taking breaks, or participating in meetings or training.



<u>Types of status, presence, and activity specific to agents</u>
Presence indicators appear as colored rings around profile pictures. Status indicators are the words that are the same color as the presence indicator. An agent's current activity displays as words or icons near the status.

Presence, status, or activity	Indicator	Description
On Queue		The agent is available to accept new interactions. Unlike other presences, agents set their status to On Queue from the top menu bar instead of in user settings.

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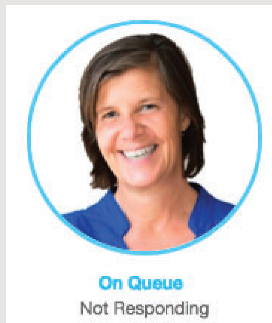
Presence, status, or activity	Indicator	Description
On Queue and working with interactions		The agent is On Queue and handling interactions. PureCloud displays the number and type of interactions that the agent is currently handling.
On Queue and Not Responding		The agent is On Queue but has declined an interaction or did not accept an interaction within a specific amount of time. Declined or not answered interactions re-enter the queue. While Not Responding, the agent does not receive new interactions, but they can continue any interactions they have already accepted. Agents stay On Queue and Not Responding until they make themselves eligible for interactions again, choose another status, go Off Queue, or log out.

Choose queues to work

Prerequesites:

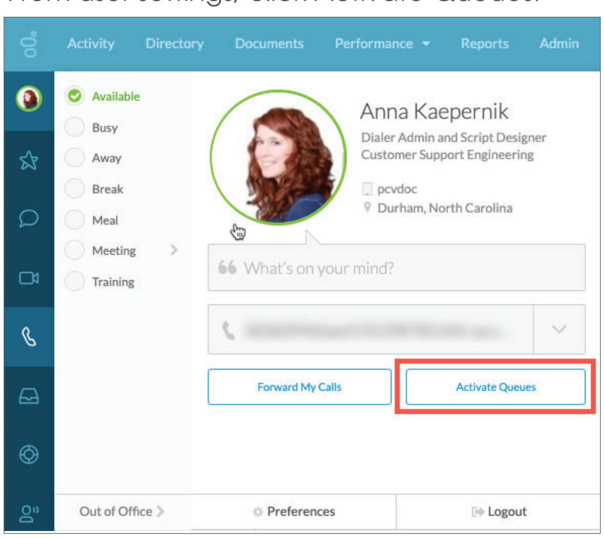
- Routing > Queue > Join permission

Agents, in addition to supervisors, can specify the queues to work. Agents can activate queues and later stop working specific queues as necessary, or as permissions allow.

Notes: Activating queues determines which queues are available when an agent goes on queue. The Routing > Queue > Join permission enables the ability to activate queues.

To access the Active and Available queues lists and to specify queues:

1. From user settings, click Activate Queues.



The Active and Available queues lists appear.

2. To activate a queue, click Activate. To see the results, click .
3. To deactivate a queue, click Deactivate. To see the results, click .

> **Notes:** You can enter a string in the Search for queues box to filter the queues displayed in each list.

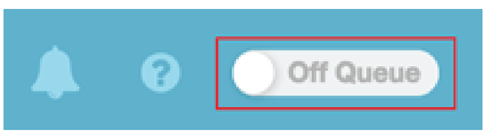
These lists display the queues that the logged-in agent is a member of. The queues in the Active Queues list are the queues the agent works after the agent selects the On Queue status. Activating and deactivating queues does not affect queue membership.

On Queue and Off Queue

> **Prerequesites:**
> - Routing > Agent > Onqueue permission

Agents can go on queue to become available to receive interactions. Any user with the Agent role, such as a manager, can also go on queue. This ability allows other users to help in times of understaffing or high incoming interaction volume.

To make yourself available to receive new interactions, use the On Queue/Off Queue toggle.



Status	Definition
On Queue	Indicates that the user is logged on and ready to accept new interactions.
Off Queue	Indicates that the agent is logged on but is not currently accepting new interactions.

> **Notes:** When an agent declines or does not answer an interaction within a certain amount of time, PureCloud places the agent into Not Responding status. While Not Responding, the agent does not receive new interactions. Declined or not answered interactions reenter the queue.

<u>Choose your next status while interacting</u>
During a current interaction, to avoid automatically connecting to the next incoming interaction, the agent can specify the Off Queue status.

1. While handing an interaction, click On Queue to change the status to Off Queue. Any current interactions or interaction in after-call work (ACW) status remain.
2. Complete any current interactions and ACW.
3. To change the status again (for example, when a break is over), click Off Queue to return to the On Queue status.

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Accept Interactions

While on queue, accept and complete interactions.

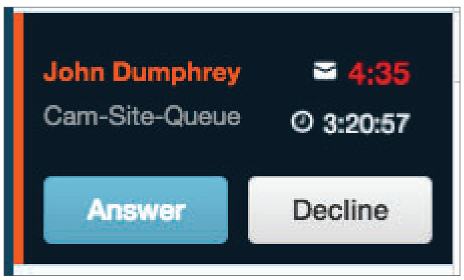
Prerequesites:

The following permissions
- Routing > Agent > OnQueue
- Routing > Queue > Join
- Routing > Queue > Search
- Routing > Queue > View

When you go on queue, you are ready to accept interactions. The Interactions panel opens and shows new interactions.

Depending on how administrators configure queue and organization settings, you can receive more than one interaction or type of interaction at the same time. For help working with multiple interactions, see Manage multiple interactions.

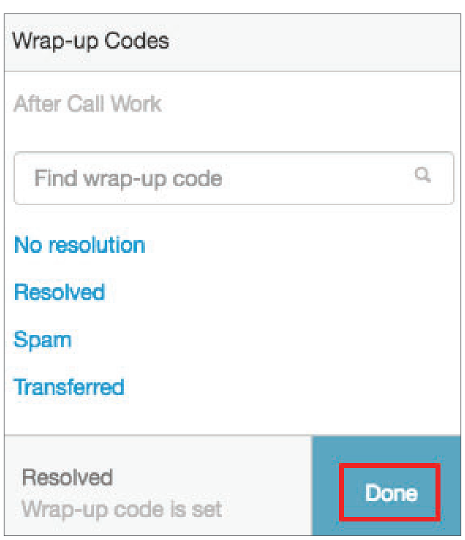
1. To begin working with an interaction, click Answer.



Notes: In the interaction alert, the top counter indicates the time remaining before the interaction returns to the queue and PureCloud places the agent in the Not Responding status. The bottom counter indicates the amount of time the interaction has been in the queue.

2. Interact with the customer.

3. After the interaction ends, complete any after call work (ACW) and click Done.



Voice interactions

Prerequesites:

- A selected phone

The following permissions

- Conversation > Call > Add
- Routing > Agent > OnQueue
- Routing > Queue > Join
- Routing > Queue > Search
- Routing > Queue > View

Voice interactions are calls that appear in the Interactions panel and are related to queues. Unlike other calls made from PureCloud, the agent receives credit for these calls because the call statistics are associated with a queue.

Voice interactions could be:

- part of an outbound campaign, such as a fundraiser or sale.
- outbound calls placed by the agent on behalf of a queue to contact a specific person and still receive metrics.
- inbound calls placed by customers, such as a help hotline.

PureCloud uses automatic call distribution (ACD) to route inbound voice interactions and outbound campaign voice interactions to agents in queues. PureCloud routes calls to agents based on a queue's evaluation and routing methods. For example, PureCloud could route a call to an agent because that agent speaks the same language as the customer, has a particular skill, or is the next available agent.

Agent utilization also affects when PureCloud assigns an agent a call. Agent utilization determines which interactions an agent can have at the same time. It also determines how many of each type of interaction an agent can interact with at one time. For example, an agent can receive a voice interaction while handling other types of interactions. For more information about handling multiple interactions at the same time, see Manage multiple interactions.

Notes: Note: During calls, agents can find and send canned responses and use a script to guide them through interactions. Scripts prompt the agent to ask questions or allow them to update contact information. To request help from a supervisor during a chat interaction, agents can use Agent assistance.

Web Chat Interactions

Prerequesites:

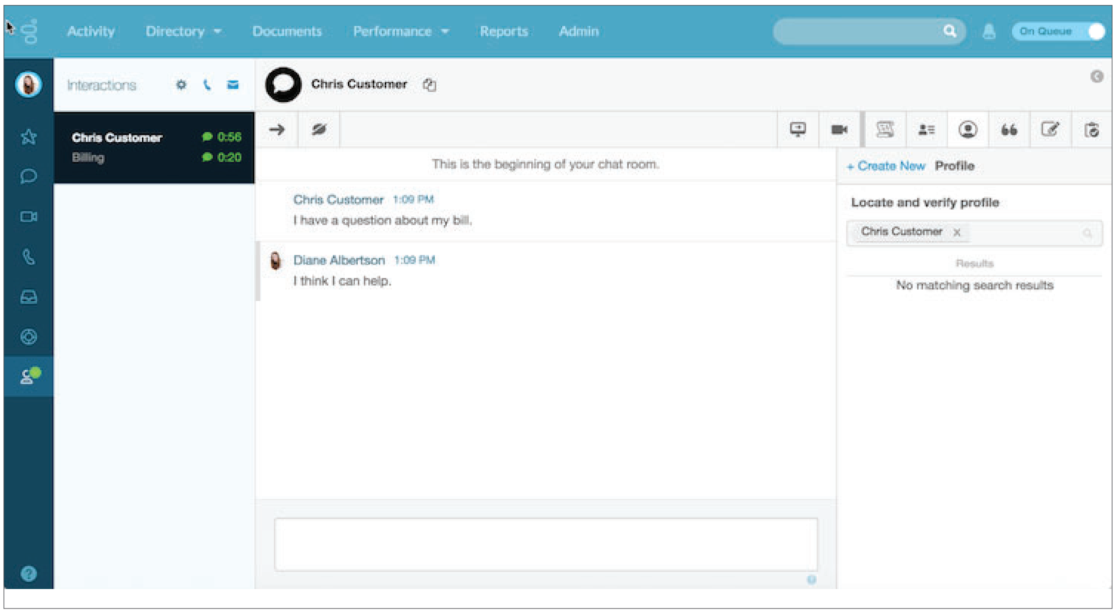
The following permissions

- Routing > Agent > Onqueue
- Routing > Queue > Join
- Routing > Queue > Search
- Routing > Queue > View

Web chat interactions enable a customer to begin a text conversation with an agent, similar to an instant message, SMS text message, or chat room experience. Both agents and customers can see the text that the other party enters. Depending on organization and queue settings, an agent can receive multiple chats at the same time or chats while handling other interactions. For more information about handling multiple types of interactions at the same time, see Manage multiple interactions.

PureCloud uses automatic call distribution (ACD) to route chat interactions to agents in queues. PureCloud routes chats to agents based on a queue's evaluation and routing methods. For example, PureCloud could route a chat to a specific agent based on several criteria:

- The agent speaks the same language as the customer.
- The agent has a particular skill.
- The agent is the next available agent.



Notes:

- PureCloud disconnects web chat interactions that have been idle for more than 15 minutes.

- During chat interactions, agents can find and send canned responses and use a script to guide them through the interactions. Scripts prompt the agent to ask questions or allow them to update contact information. To request help from a supervisor during a chat interaction, agents can use Agent assistance.

Email Interactions

Prerequesites:

The following permissions

- Conversation > Email > Create
- Routing > Agent > OnQueue
- Routing > Queue > Join
- Routing > Queue > Search
- Routing > Queue > View

Email interactions enable agents to receive and reply to customer email messages. Depending on organization and queue settings, an agent can receive multiple email messages at the same time or email messages while handling other interactions. For more information about handling multiple types of interactions at the same time, see Manage multiple interactions.

PureCloud uses automatic call distribution (ACD) to route email interactions to agents in queues. PureCloud routes email messages to agents based on a queue's evaluation and routing methods. For example, PureCloud routes an email message to an agent for any of the following reasons:

- The agent speaks the same language as the customer.
- The agent has particular skills.
- The agent is the next available agent.

Notes: During email interactions, agents can find and send canned responses and use a script to guide them through interactions. Scripts prompt the agent to ask questions or allow them to update contact information. To request help from a supervisor during a chat interaction, agents can use Agent assistance. Email drafts are saved automatically and agents can see drafts when they view an email interaction.

Message Interactions

Prerequesites:

- PureCloud 3 license
- Conversation > Message > Create permission

Message interactions enable a customer to begin a text conversation with an agent. Both agents and customers can see the text that the other party enters.

Depending on organization and queue settings, an agent can receive multiple message interactions at the same time or messages while handling other interactions. For more information about handling multiple types of interactions at the same time, see Manage multiple interactions.

PureCloud uses automatic call distribution (ACD) to route message interactions to agents in queues. PureCloud routes message interactions to agents based on a queue's evaluation and routing methods. For example, PureCloud could route a message to a specific agent based on several criteria:

- The agent speaks the same language as the customer.
- The agent has a particular skill.
- The agent is the next available agent.

Notes: During message interactions, agents can find and send canned responses and use a script to guide them through interactions. Scripts prompt the agent to ask questions or allow them to update contact information. To request help from a supervisor during a chat interaction, agents can use Agent assistance.

<u>Using speicifc messaging channels</u>

Facebook messenger - When you receive a message through the PureCloud for Facebook Messenger integration, you must respond to messages from Facebook Messenger within seven days. After seven days, any messages you attempt to send in response will result in an error and not be delivered.

WhatApp - You must respond to an inbound message from WhatsApp within 24 hours. After 24 hours, any messages you attempt to send in response will result in an error and not be delivered.

Request Assistance

While on queue, accept and complete interactions.

Prerequesites:
- Routing > Agent > OnQueue (included in the PureCloud User role)
- Routing > Queue > Edit (included in the PureCloud Supervisor role)

Agent Assistance is a chat room where all agents and supervisors can post, see, and respond to messages.

1. To open the Agent Assistance room, click Agent Assistance.

2. To send a message in the Agent Assistance room, type the request for assistance and then press Enter.
   The message appears to all users in the room, including to all on-duty supervisors.

Notes: If you have closed the panel, a badge appears on the Agent Assistance icon to indicate new messages. Click Agent Assistance again to display those messages.

Gauge Your Performance

Review completed interaction evaluations. Gauge your historical performance in comparison to your team's performance. View information about your statuses, evaluations, and schedule. View the performance of the queues you are a member of.

Review released evaluations

Prerequesites:

- Analytics > Conversation Aggregate > View permission
- Quality > Evaluation > Edit Agent Sign-off permission
- Quality > Evaluation > View permission

Agents can review evaluations for specific interactions. Evaluations are typically released for agent review after a Quality Evaluator has scored them. Supervisors and managers can see details about an agent's evaluations, including whether the agent has reviewed an evaluation, on the Agents Evaluation Detail view. To review your released evaluations, complete the following steps:

1. Click Performance > My Performance.
2. From the My Performance view, click the Evaluations tab.
3. From the My Evaluations view, click the Release Date / Time of the evaluation you want to review.

Notes:

- You can also view released evaluations waiting for review from your inbox.
- You cannot review evaluations older than 90 days, from the day the evaluation was created.

4. From the interactions detail page, review your scores and any comments added by the evaluator while listening to the recording.
5. To add your comments to the evaluation, click (Agent comments).
6. To finish reviewing the evaluation, select I have reviewed this evaluation.
7. Click Save.

My Performance Views

See your performance as an agent, including your metrics, time in statuses, evaluations, and schedules. To access agent metrics, click Performance > My Performance. My Performance views includes the following views:

- My Performance view
- My Status view
- My Evaluations view
- My Schedule view

Notes: Each view has its own permissions. For permission requirements, see each view's article.

Customize the views

Where applicable, you can customize these views to show only certain data. For example, you can arrange to see only some columns or only data from certain date ranges. Your customizations remain as you navigate from view to view or leave and return to a view. You can also save your filter and column settings as a saved view to quickly switch between different data of interest in the same view. You can also export the data in a view. For more information about the customizations available in each view, see each view's article.

Customizations available include:

- media type
- date
- showing or hiding columns
- rearranging columns
- filtering by user name
- filtering by interaction details such as skills and languages

Notes: Real-time updates stop while any interaction detail filters in the Filters pane are active.

My Queues Activity View

Prerequesites:

The following permissions:

- Analytics > Conversation Aggregate > View
- Analytics > Queue Observation > View
- Routing > Queue > View
- UI > Agent Queue Activity > View

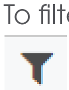
To see real-time statistics for all of the queues you are a member of, click Performance > My Queues Activity. This view displays current metrics and information about your queues, such as the number of waiting interactions, the number of current interactions, and the number of agents on queue.

Customize the view

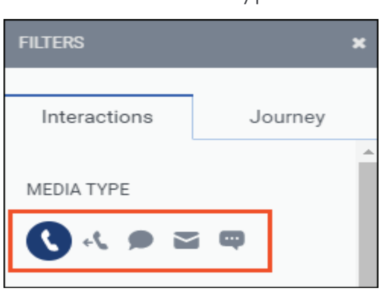
Customize your My Queues Activity view to show only certain data. For example, you can choose to show only certain columns or filter to see certain types of interactions. Your customizations remain as leave and return to the view.

Filter by media type

1. To filter by media type, click the Filter icon.



2. Select the media type.



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The selected media type icon is displayed above the column headers.

Icon	Media Type
All	All media types
	Voice
	Callback
	Chat
	Email
	Messages

Show, hide, and rearrange columns

To show or hide columns, click + and then search or scroll to select the columns you want to view.

To rearrange columns, click a column header and drag it.

Available Information

Your customizations determine which columns the view shows.

Interactions

Column	Description
Name	The name of the queue.
Interactions	The number of interactions assigned to the queue that agents are currently interacting with.
Longest Interacting	The amount of time that the longest interacting interaction has been interacting for each media type.
Longest Waiting	The amount of time that the longest waiting interaction has been waiting in queue for each media type
Waiting	The number of interactions waiting to be answered. Waiting is calculated by the sum total of the number of interactions waiting.

Performance

Column	Description
Service Level %	Service level target is a contact center performance statistic expressed as “X percent of contacts answered in Y seconds.” For example, a goal of answering 80% of voice calls within 20 seconds

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Service Level %	provides a service level target of 80/20. You can set the service level target for each media type in a queue. Analytics uses this service level target to calculate whether you are within the service level % defined by your service level agreement (SLA). For more information about setting the service level target, see Create queues or Edit or delete queues. The service level percentage is the percentage of interactions that meet your contact center's service level target. Calculated by: (Number of answered interactions - number of answered interactions that miss the service level target) / (Number of answered interactions + number of abandoned interactions)*100 Admins can also choose to include flow-outs in the calculation. For more information, see Configure the service level calculation. If you include flow-outs, the service level calculation is: (Number of answered interactions - number of answered interactions that miss the service level target) / (Number of answered interactions + number of abandoned interactions+ number of flow-outs)*100 Note: Any interactions that leave a queue without an agent handling or transferring the interaction, including callbacks, count as flow-outs. Callbacks do not count as answered within service level, even if the callback was offered before the Service Level Target was reached. Admins can also choose to include short abandons in the calculation. For more information, see Configure the service level calculation. If you include short abandons, the service level calculation is: (Number of answered interactions - number of answered interactions that miss the service level target) / (Number of answered interactions + number of abandoned interactions - number of short abandoned interactions) *100.
Offered	The number of interactions routed into the queue for an agent to answer. Offered interactions are either answered, abandoned, or flow-out interactions.
Abandon	The number of interactions where a customer disconnects in an ACD queue before connecting with an agent. For example, the customer hangs up before an agent answers, or the system disconnects the interaction.
Abandon %	The percentage of offered interactions in which the customer disconnected before connecting with an agent. The abandon rate can identify queues that require extra staff to handle interactions in a timely manner. Calculated by: (Abandoned Count / Offered Count) * 100
Flow-Out	Flow-outs are interactions that enter and leave a queue without getting answered by an agent and without getting disconnected. Flow-outs are an indication of customer service level and queue productivity. High numbers of flow-outs can indicate staffing issues or ineffective agents when used with high handle times (bullseye matching metrics). Flow-outs can include transfers to voicemail, callbacks, and any system-driven events such as in-queue flows that transfer to anoth-

Flow-Out (cont'd)	er queue or external party after a certain amount of time. Flow-outs can also occur if the caller opts to exit out of the queue and return to the IVR. Offered interactions are either flow-out, answered, or abandoned interactions.
Flow-Out %	The percentage of interactions that enter and leave a queue without getting answered by an agent or disconnected. Flow-outs are an indication of customer service level and queue productivity. Calculated by: (Flow-out Count / Offered Count) * 100
ASA	The average amount of time an interaction waits in queue before an agent answers it. This metric does not include interactions that agents do not answer. ASA is directly associated with service level and provides insight into the customer service your company provides. ASA is recorded in the interval in which the agent answered the interaction. Calculated by: Total Time to Answer / Number Answered
Avg Handle	The average amount of time agents spent handling interactions. This calculation includes talk time, hold time, and after-call work. For outbound calls it also includes dialing and contacting time. Calculated by: (cumulative talk time + cumulative hold time + cumulative after-call work + cumulative dialing time + cumulative contacting time) / Number of interactions handled In these views, the Avg Talk, Avg Hold, and Avg ACW columns do not equal the Avg Handle column because only some interactions include holds. This view calculates average handle column using cumulative counts rather than averages.
Answer	A measurement of the number of assigned ACD interactions answered by an agent in a given period. Answered increments when the agent is the first to connect to the interaction.
Answer %	The percentage of offered interactions that an agent answered. Calculated by: (Answered / Offered) * 100
Transferred	A measurement of the number of interactions an agent answered in one queue and then transferred. A transfer counts for the queue in which an agent answers the interaction. This measurement is calculated by the number of interactions blind transferred or consult transferred.
Avg Wait	The average amount of time an interaction is in a queue before an agent answers it, it flows out, or the customer abandons it. Calculated by: Total Wait Time / Interactions
Avg Talk	The average number of seconds spent interacting on a media type. Calculated by: Total Talk time / Count of interactions with Talk time

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Avg Hold	The average number of seconds that interactions were placed on hold. Calculated by: Total Hold Time / Count of interactions with holds
Avg ACW	The average amount of time agents spent completing after-call work. Calculated by: Total ACW / Interactions with ACW
Outbound	This metric represents the number of outbound interactions placed on behalf of queue.
Handle	The total number of ACD and non-ACD interactions agents were involved in, including answered interactions, transfers, callbacks, and outbound calls. Handle increments in the interval in which the interaction ends, after the agent completes any after call work and completes the interaction.
Total Handle	The total amount of time agents spend handling interactions. This calculation includes talk time, hold time, and after-call work. For outbound calls it also includes dialing and contacting time. Calculated by: (cumulative talk time + cumulative hold time + cumulative after-call work + cumulative dialing time + cumulative contacting time)
Total Talk	Amount of time spent interacting on a media type.
Total Hold	The cumulative hold time for all interactions.
Total ACW	The total time spent in after-call work (ACW). After-call work is the work that an agent performs immediately following an interaction. Work may involve keying activity codes, updating customer databases, filling out forms, or initiating outbound contact. As a metric, it indicates the total time an agent takes to finish working on a call. If an agent must complete work before the agent can handle the next contact, then ACW is factored into the average handle time.
Hold	The number of interactions with holds.
Transfer %	The number of transfers compared to the total number of interactions answered. Calculated by: (# of transfers / interactions answered) * 100
Max Abandon	The maximum time of an abandoned interaction for the selected interval.
Min Abandon	The minimum time of an abandoned interaction for the selected interval.
Max Wait	The maximum time of an abandoned interaction for the selected interval.
Min Wait	The minimum amount of time spent waiting in queue for the selected interval.

Max Talk	The maximum amount of time spent interacting for the selected interval.
Min Talk	The minimum amount of time spent interacting for the selected interval.
Max Hold	The maximum amount of time spent on hold for the selected interval.
Min Hold	The minimum amount of time spent on hold for the selected interval.
Max ACW	The maximum amount of time spent on after call work for the selected interval.
Min ACW	The minimum amount of time spent on after call work for the selected interval.
Over SLA	Number of interactions that were over the defined Service Level.
Met SLA	Number of interactions that met the defined Service Level.
Short Abandon	Number of interactions that were short abandoned.
Short Abandon %	Percent of interactions that were short abandoned.
Abandon - No Short	Number of abandons excluding the short abandons.
Abandon - No Short %	Percent of abandons excluding the short abandons.
Outbound Attempt	Attempted outbound interactions.
Voicemail	Count of voicemails received.

Agents

Column	Description
On Queue	The On Queue metric represents the number of agents that are on queue for a specific queue.
Off Queue	Off Queue represents the number of agents that are off queue for a specific queue. These agents are in another status, such as Available, Busy, or Meeting. Agents in the Out of Office and Offline statuses are not included in this number.
Interacting	The number of agents working with interactions. This number includes agents completing after call work.
Presence Breakdown	The number of agents in different presences. For more information, see Presence, status, and activity indicators overview

Communicating	The agent is on a non-ACD call, and, in relation to agent utilization and call routing, PureCloud treats the non-ACD call like an ACD call. For example, administrators could configure agent utilization so PureCloud does not route new interactions to agents while they on an ACD or non-ACD call. This status only appears if administrators have selected "Include non-ACD conversations" when they configured agent utilization.
Idle	The number of agents who are on queue and available to take interactions but who are not working with interactions.
Not Responding	An agent was On Queue or Interacting and did not answer an offered interaction. The agent could still be handling and completing other previous interactions. While Not Responding, the agent does not receive new interactions.

Interpret counts in the My Queues Activity view

In the My Queues view, user statuses and routing statuses sometimes add up to more than the total number of agents in the queue. This situation arises when agents change their user status while working with interactions.

For example, agents Bob and Alex are each working with an interaction. Bob changes his status to Break, and Alex changes his status to Meeting, but they both still have a chat interaction. In this situation, the view displays "2" in the Off Queue section, but it also displays "2" in the Interacting section.

Log Out

At the end of each shift, log out of PureCloud.

1. To log out, access user settings from your picture in the sidebar. Then click Logout.
2. To end your session, close the browser window after you log out of PureCloud.