



promero

The Right Technology, the Right Results

Oracle ContactCenter@nywhere

Interaction Quick User Guide

January 2007

Learning Services
Promero

TABLE OF CONTENTS

I.	What is the Interaction Manager?	1
II.	Features and Benefits of Using the Interaction Manager	1
III.	Launching the Interaction Manager:	2
IV.	Global Command Buttons	2
	Configure	2
	General Tab	2
	Popup	2
	Play Sound	2
	Play Continuously	2
	Browse in Select	2
	Enter Email	2
	Work Off Hook	2
	Phone Tab	2
	H323	2
	SIP	2
	MSI	2
	PBX	2
	Remote Extension/External Phone Number	2
	Regional Options	3
	Voicemail Prompt	3
	Help	3
	About	3
	Logout	3
V.	Interaction Control Screen	3
VI.	Understanding the Interaction Manager Information Bar	4
	Phone Status	4
	Agent Status	4
	Availability Icons	5
	Chat icon is bright	5
	Number of Waiting Interactions	5
VII.	Navigating in the Interaction Manager	5
	Call Control Screen	5
	Agents accepting Interactions	5
	Agents controlling their Status	6
	Agents directing a telephone interaction	6
	Agents transferring an Interaction	7
	Transfer to Agent	7
	Transfer to Workgroup	7
	Transfer to External Phone Number	7
VIII.	Using the Predictive Dialer	8
	Activate a predictive call	8

CONTACTCENTER @NYWHERE INTERACTION MANAGER DEMO SCRIPT

I. What is the Interaction Manager?

The Interaction Manager is a browser-based call control and contact management tool used by remote or locally based Agents working in a call center anywhere in the world. With the Interaction Manager, users handle Interactions originating from various media including telephone, chat, predictive, e-mail, and the web. The Interaction Manager provides fully integrated contact management, so all the information you need to offer personal attention to your callers is instantly accessible. Because the Interaction Manager is browser-based, you can work from any computer that has access to the Internet.

II. Features and Benefits of Using the Interaction Manager

ContactCenter@nywhere and the Interaction Manager provide robust features for call center Agents, including:

- Browser-based interface, allowing you to work locally (intranet) or remotely (internet).
- Multimedia ready, accepting telephone calls, e-mails, and web-originated chats, faxes and call-back requests.
- Conferencing capability allows participation by Supervisors, other Agents, or parties outside your company.
- Interaction histories for documenting transactions and providing personal attention to customers.
- Full billing control, so all calls are accounted for.
- Automatic Contact screen pop using ANI (Automatic Number Identification) or e-mail address, and when used with Prostar on demand, enhanced screen pop and data capture capabilities are added.
- Automatic display of Project Name or phone number (DNIS) with each Interaction
- Web call-back capabilities with integrated scripts, allowing Agents to get back to web customers quickly and with the information the customer needs.
- Full Predictive and Preview dialing capabilities with integrated campaign scripts (Predictive and Preview are available as optional features).


III. Launching the Interaction Manager:

1. **Login** using the below credentials:
 - Company Alias Name: **Enter Your Company Alias Name**
 - UserName: **Your Interaction Manager Username**
 - Password: **Your Interaction Manager Password**
2. **Select** Interaction Manager from the main login Window.
3. The **Call Control** Window displays. Refer to Figure 1.

The Call Control window displays whenever you launch the Interaction Manager. If it does not, click Call Control on the Navigation Pane.

IV. Global Command Buttons

1. Configure

- These setup/preset options in below tabs, are controlled by the business requirements/rules you provided to Promero.
- **General Tab** – Agents can control the **Interaction Mode** of their calls.
 - ✓ **Popup** - Agents can select to automatically display the Call Control window when an interaction is received.
 - ✓ **Play Sound** – Agents can select to play a one-time sound when an Interaction is received.
 - ✓ **Play Continuously** – Agents can select to play a sound repeatedly until the Interaction is accepted.
 - ✓ **Browse in Select File (.wav) window** – Explain Agents would click **Browse** to locate the .wav file. Then they would click **Open** once they found the .wav file. They then select the play icon. 
 - ✓ **Enter Email Client** – The Agent clicks **Browse** to locate the Email program he wishes to use with ContactCenter@nywhere. He would click Open to save the program. The Interaction Manager automatically launches this email program whenever the agent engages in email activities.
 - ✓ **Work Off Hook** – Explain if Agents select to work with the phone off hook, there is **no dial tone**. He will **receive a beep** for incoming interactions. **This option is only available for Predictive dialing.**

The Agent would need to **Click OK to Save** above changes in the General Tab.

- **Phone Tab** – Agents need to select their **extension type**. The Administrator can assist them with this endeavor.
 - ✓ **H323** – Enter their IP address
 - ✓ **SIP** – Enter the IP address
 - ✓ **MSI** – Enter MSI Identification Number in the MSI window
 - ✓ **PBX** – Enter phone extension in phone window.
 - ✓ **Remote Extension/External Phone Number** – Enter 10-digit number.

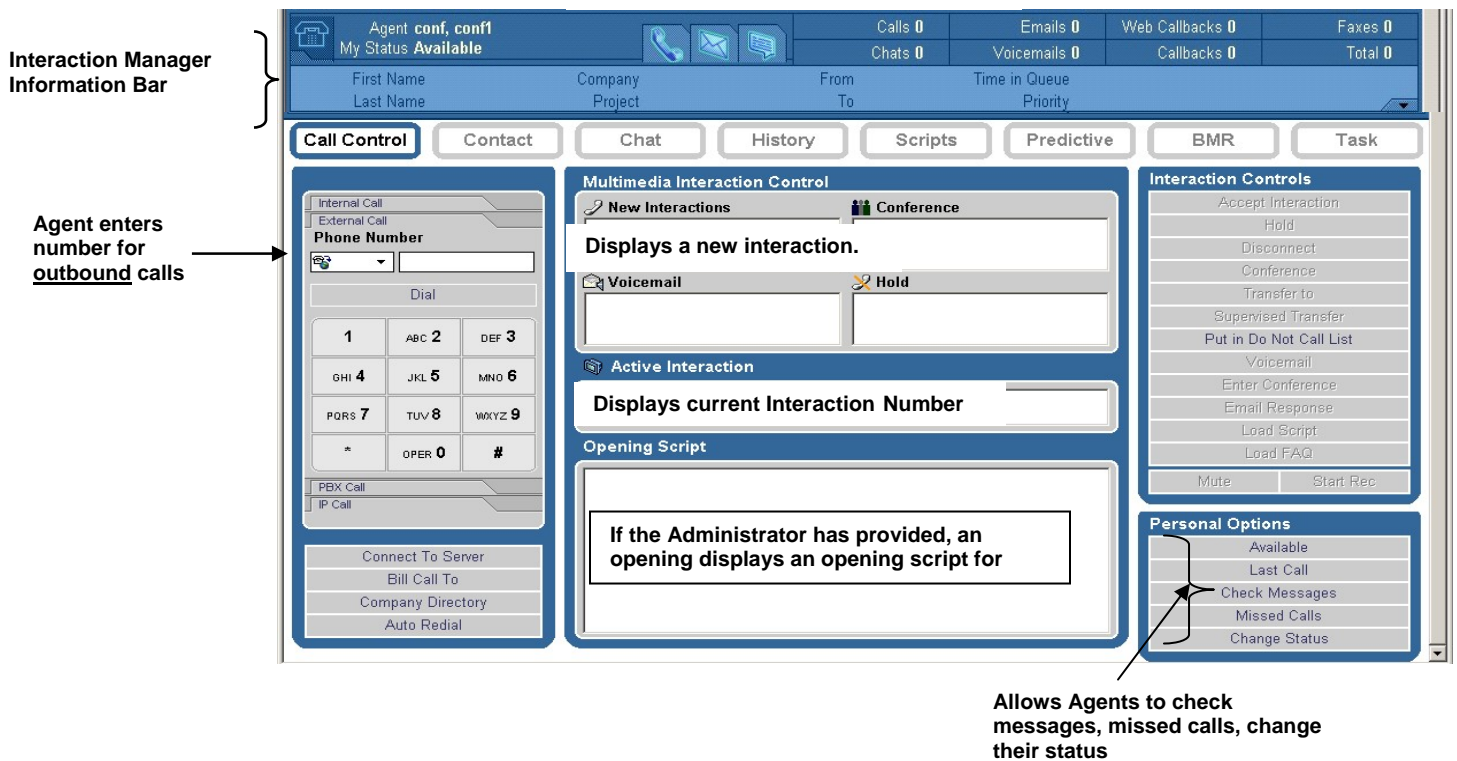
IV. Global Command Buttons (Continued)

- **Regional Options** – This allows the Agents to set the time zone and date format for their workstation. For example, if they work in a different time zone than their Supervisor or Company Headquarters, they may want to configure your settings to match their time zone and date format.
 - **Voicemail Prompt** –ContactCenter@nywhere allows Agents to record and store personal greetings to callers and allows callers to leave you a voicemail. They can record a greeting to be stored on their telephone or use a sound recording stored on your computer in a .wav format.
2. **Help** – Help contains the complete Supervision Manager User’s Guide.
 3. **About** – This is the copyright notice from Telephony.
 4. **Logout** – It is important to click **Logout** when not using the system.

V. Interaction Control Screen

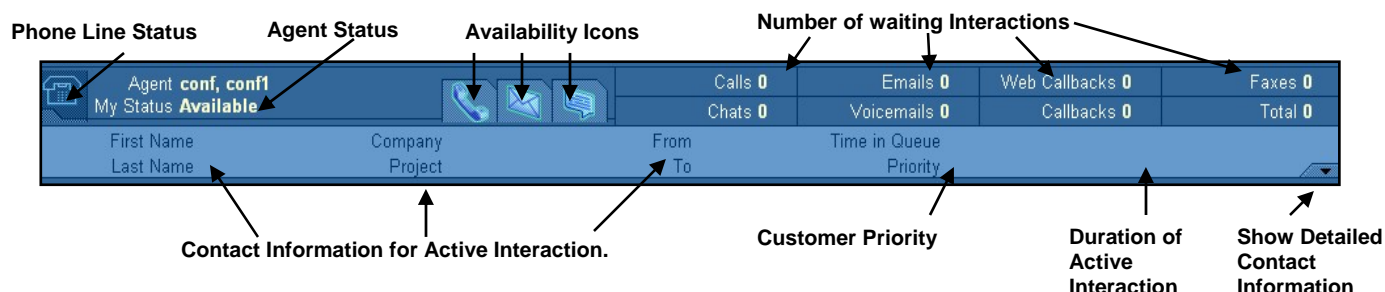
- The layout of the Call Control screen.

Figure1 – Interaction Control Screen



VI. Understanding the Interaction Manager Information Bar

Figure 2 – Interaction Manager Information Bar



- **Phone Status:**

- - Phone Status shows **Normal** – Agent is able to receive Interactions (refer to above Figure 2).
 - Phone Status shows **off the hook** – Indicates phone is off the hook, but Agent is not engaged in an interaction.
 - Phone Line Status shows **Ringing** – Indicates an incoming Interaction.
 - Phone Line Status Shows **Headset Only** – Indicates Agent currently speaking with a caller.

- **Agent Status: Refer to Below Table 1**

Table 1 – Agent Statuses




Status	Meaning	Conditions
ACD Callback	Busy	Agent is handling a callback request
ACD Chat	Busy	Agent is handling a chat interaction
ACD Email	Available	Agent is handling an email interaction.
ACD Fax	Available	Agent is handling a fax interaction.
ACD Voicemail	Available	Agent is responding to a voicemail interaction.
ACD Web Callback	Busy	Agent is handling a web callback request.
Available	Available	Agent is not presently handling an interaction.
Last Call	Busy	This is set by the Agent indicating he is taking no more interactions after completion of current interaction.
No Answer	On break	Agent did not answer a Workgroup call after the maximum allowed number of rings.
On Break	On break	This is set by the Agent. He is not available to receive interactions.
Wrap Up	Busy	Agent is wrapping up an interaction. This time is set by the Administrator.



Note: The Administrator may set additional Agent statuses.

VI. Understanding the Interaction Manager Information Bar (Continued)

• Availability Icons

-  **Phone Headset is bright;** the Agent available to receive phone interactions. When the headset is dimmed, the Agent is not available to receive interactions.
-  **Envelop icon appears bright;** Agent is available to receive additional email interactions. When the envelope icon is dimmed, he is not available for emails.
-  **Chat icon is bright;** the Agent is available to receive additional Chat interactions. When it is dimmed, he is not available.

• Number of Waiting Interactions:

- Agents can view the total number of calls, emails, web callbacks, chats, voicemails, etc. waiting in queue.

VII. Navigating in the Interaction Manager

- **Call Control Screen** –The call control screen alerts agents to incoming Interactions, displays the Interaction type and all available information about the caller, and provides controls for handling or redirecting the call. This screen also contains the dialer and other controls making outgoing calls. Finally, these controls are used for managing the Agent's availability, checking messages, missed calls, and configuring the Interaction Manager. (**Refer to figure 1.**)
 - **Agents accepting Interactions:** The new interaction displays in the New Interactions Window. The Agent would click **Accept Interaction** from the Interactions Controls Screen **OR double click** the phone number in the New Interactions window. The caller's number is removed from the New Interaction Window and placed in the Active Interaction window. Any information regarding that caller is also displayed.

The Administrator has provided an opening script for the Agent's project; it will be displayed in the Opening Script window.



Note: If this is a new customer, the Agent should click the Contact tab and enter customer information.

What if:

1. **What happens if the Agent does not answer the interaction within the preset number of rings?** The Agent's status is changed to "No Answer" and the interaction is placed back into the queue for the next available Agent.
2. **Can we do call back request?** - These are set up by the Administrator. There are two kinds of call back requests?
 - ✓ **Call Back Request** – Using a touch tone menu, while waiting in a workgroup queue, the customer can request a call back.
 - ✓ **Web Callback**- Displays a web page where the customer enters their callback information.

VII. Navigating in the Interaction Manager (Continued)

3. **What happens if the customer does not answer the requested call back?** –The Agent would disconnect from the unsuccessful call back. Interaction Manager displays the Outcome window where the Agent can reschedule the call.

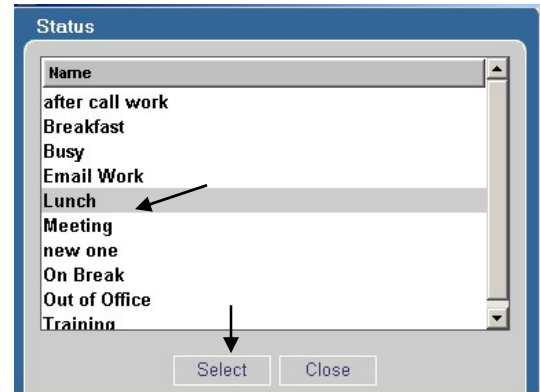
Figure 3 – Agent Controlling their Status

- **Agents controlling their Status:** statuses are added by the Administrator, but the Agent can control his own status.

- **Click Change Status** in the Personal Options Window
- **Select Lunch** from the Status Window
- **Click Select**

Agent Status in the Interaction Manager screen changes to lunch.

The **Agent would click Available** in the Personal Options window when he is ready to accept interactions again.




- **Agents directing a telephone interaction:**

- How the Agent would direct a telephone interaction from the Multimedia Interaction Control windows.
 - **Highlight the number in the Active Interaction window.**
 - **Click Hold** in the Interactions Control Window
 - **Click Conference** the Interactions Control Window

The number is now in the Hold/Conference windows in the Multimedia Interaction Control windows.



Note: 1 – The Agent can drag the interaction to another window. To do this, you click and drag the icon, not the phone number. For example, to drag the Active Interaction to Conference, you would click the  and drag it to the Conference window.

VII. Navigating in the Interaction Manager (Continued)

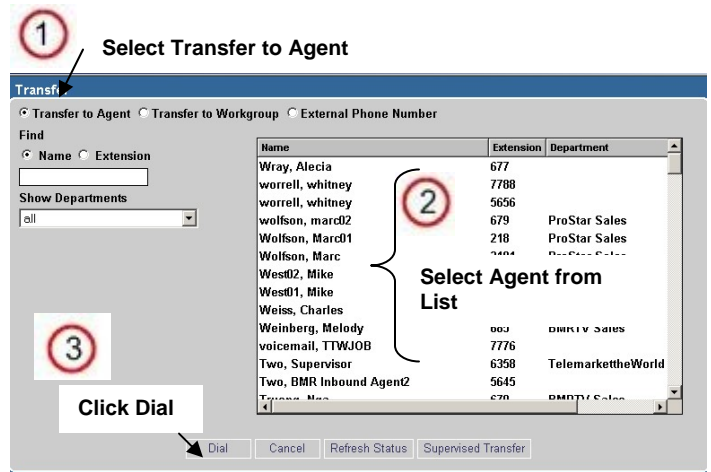
Figure 4 – Transferring Calls

- Agents transferring an Interaction:

- Click Transfer to in the Interaction Controls Window
- Select Type of Transfer

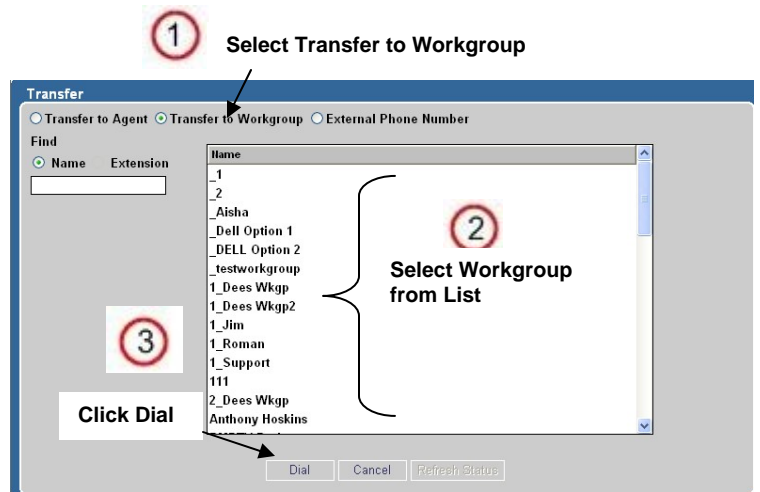
- Transfer to Agent

1. Select Transfer to Agent
2. Select Agent from List
3. Click Dial



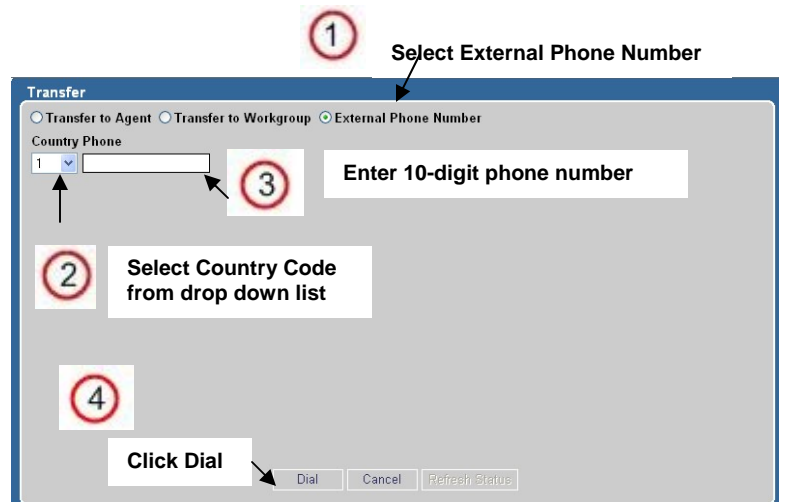
- Transfer to Workgroup

1. Click Transfer to Workgroup
2. Select Workgroup Name from List
3. Click Dial



- Transfer to External Phone Number

1. Click External Phone Number
2. Enter the Country code from drop down list
3. Enter 10–digit phone number
4. Click Dial



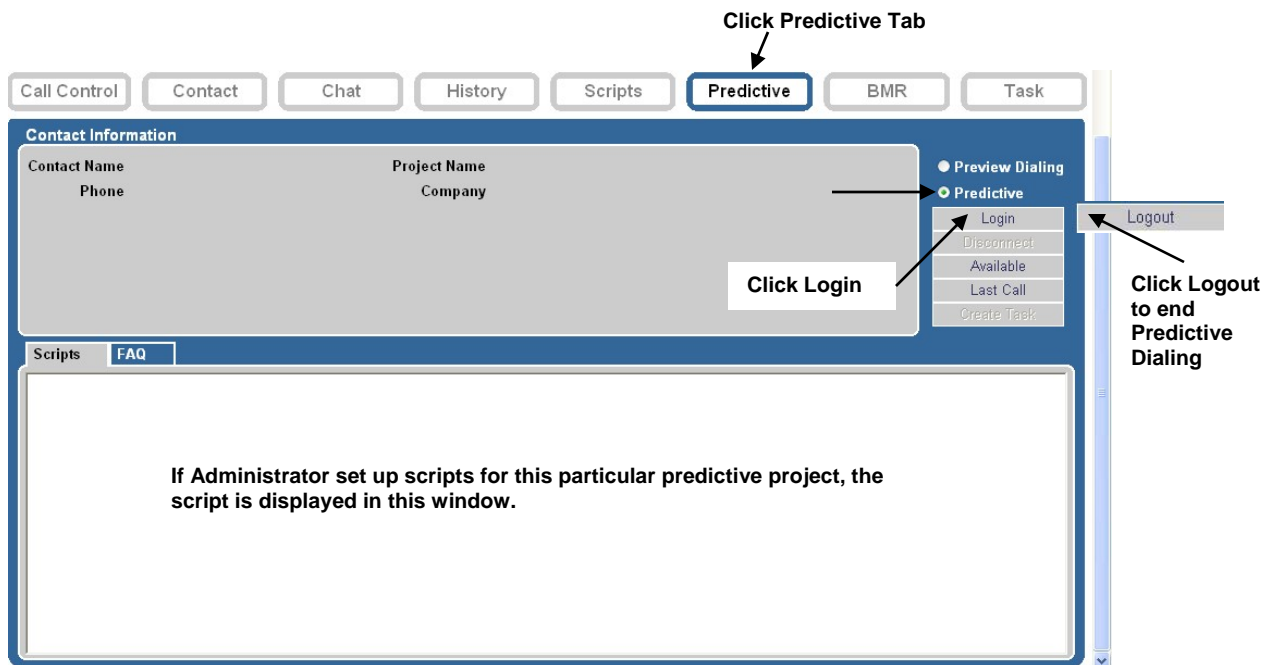
VIII. Using the Predictive Dialer

- The **Predictive dialer** is an optional feature of ContactCenter@nywhere. The Predictive Screen is available only if ContactCenter@nywhere has been configured to handle Predictive Interactions. The Predictive Screen lets you login to a Predictive calling Project. The ContactCenter@nywhere Predictive Project (launched by your Administrator) automatically calls prospective customers and, when they pick up, rings your phone. When you accept the Predictive call, ContactCenter@nywhere displays the script for that particular predictive project on your screen. The scripts are set up by the Administrator. While you are handling a Predictive Interaction, ContactCenter@nywhere does not route incoming Phone Project calls to you.

- **Activate a predictive call:**

1. Click the Predictive Tab in the Call Control Window.
2. Click the radio button next to Predictive
3. Click Login (**Once Agent Logins, the Login Button changes to Logout**)
4. The Predictive Dialer will make calls based on the settings created by the Administrator. If the Administrator has set up scripts for this predictive project, it will display in the Scripts window.
5. To End a Predictive dialing session, the Agent clicks Logout.

Figure 5 - Using the Predictive Dialer



What if:

What does Preview Dialing do? - It allows the Agent to select a project and customer from a preloaded list. If a script has been provided by the administrator for this project, it will display on the Agents screen.