Agent Work Flow

Worflow Stages

Step 1: Login & Setup

- Agent logs in
- Selects campaign (if applicable)
- Reviews environment

Step 2: Agent Becomes Available

- Agent sets status to **Ready**
- System includes agent in dialing pool

Step 3: Call Handling

- Dialer places calls automatically
- Agent receives call when connected
- Lead information is displayed

Step 4: Active Call Handling

- Agent interacts with customer
- Uses controls:
  - Mute
  - Hold
  - Transfer
- Follows script / CRM

Step 5: Call Completion

- Call ends (agent or customer)
- System moves agent to **Wrap-up**

Step 6: Disposition & Data Capture

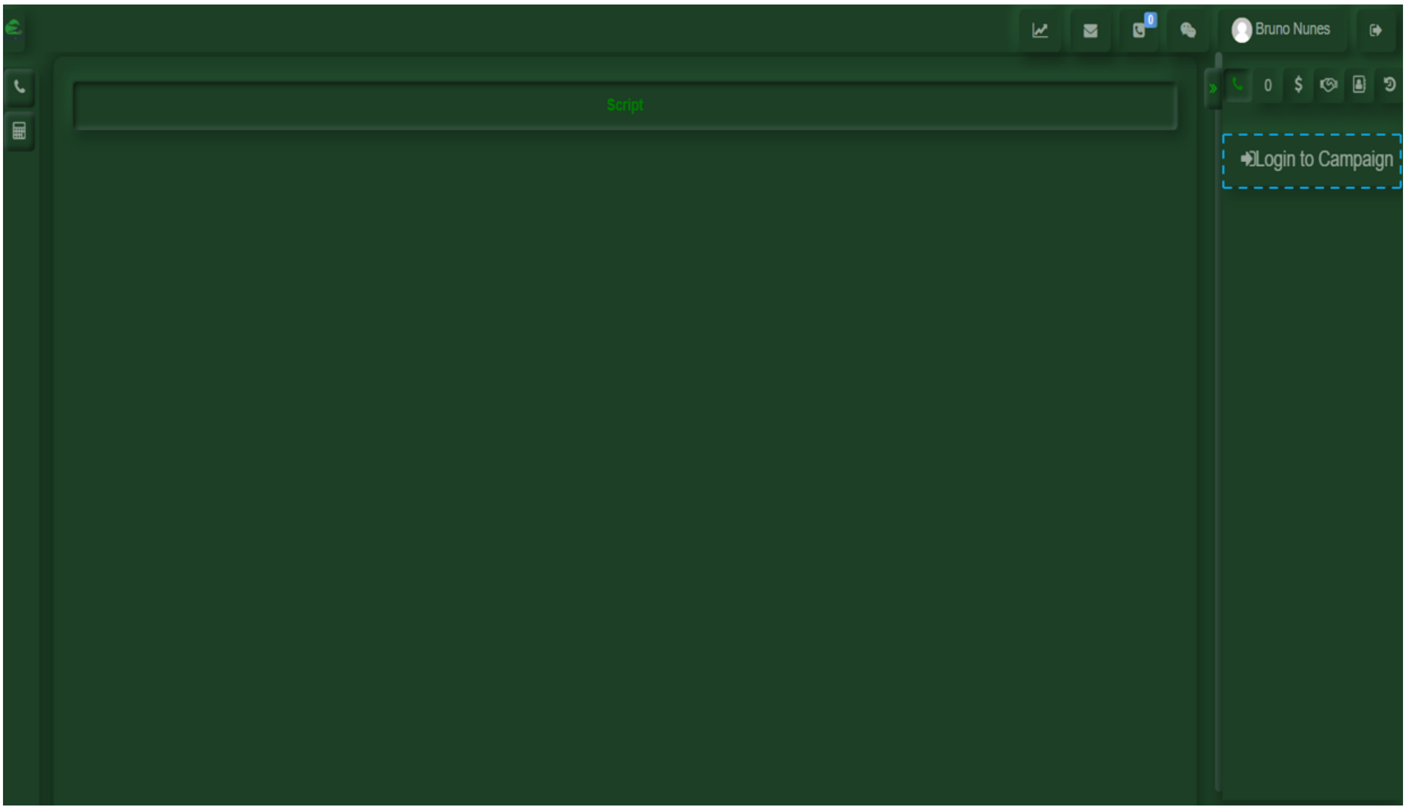
- Agent selects outcome
- Adds notes
- Schedules callback if needed

Step 7: Next Call Cycle

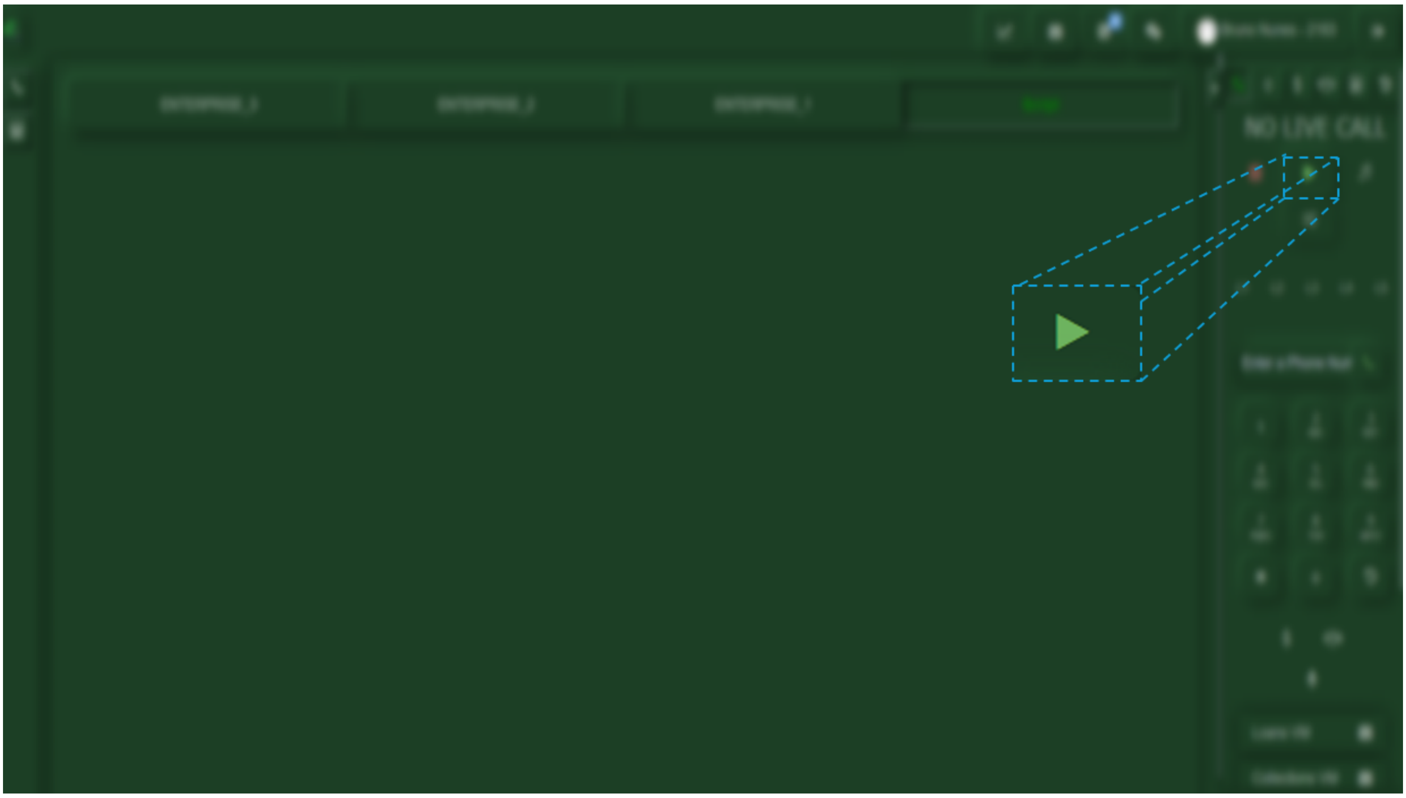
- Agent returns to:
  - Ready (auto o manual)
- Next call is delivered

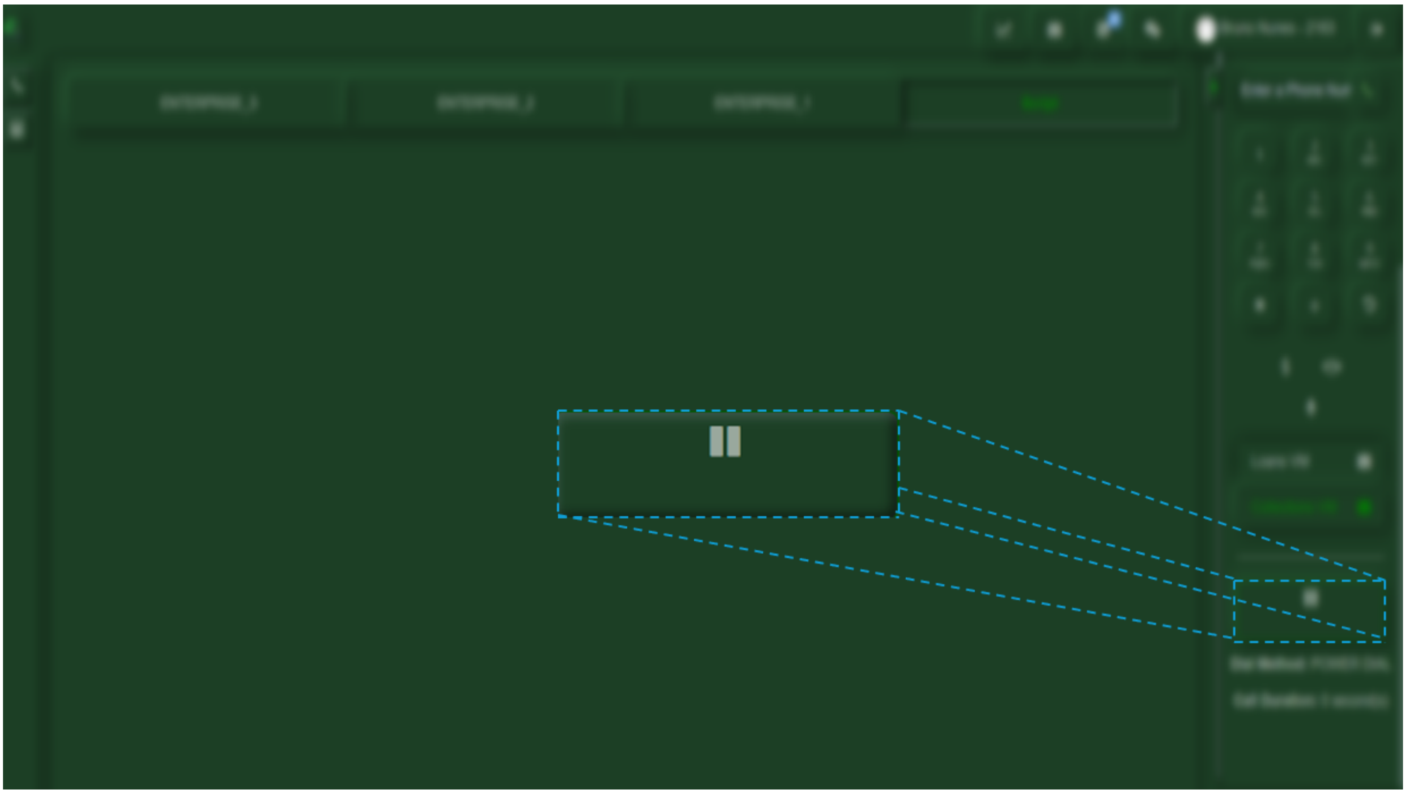
Login & Setup

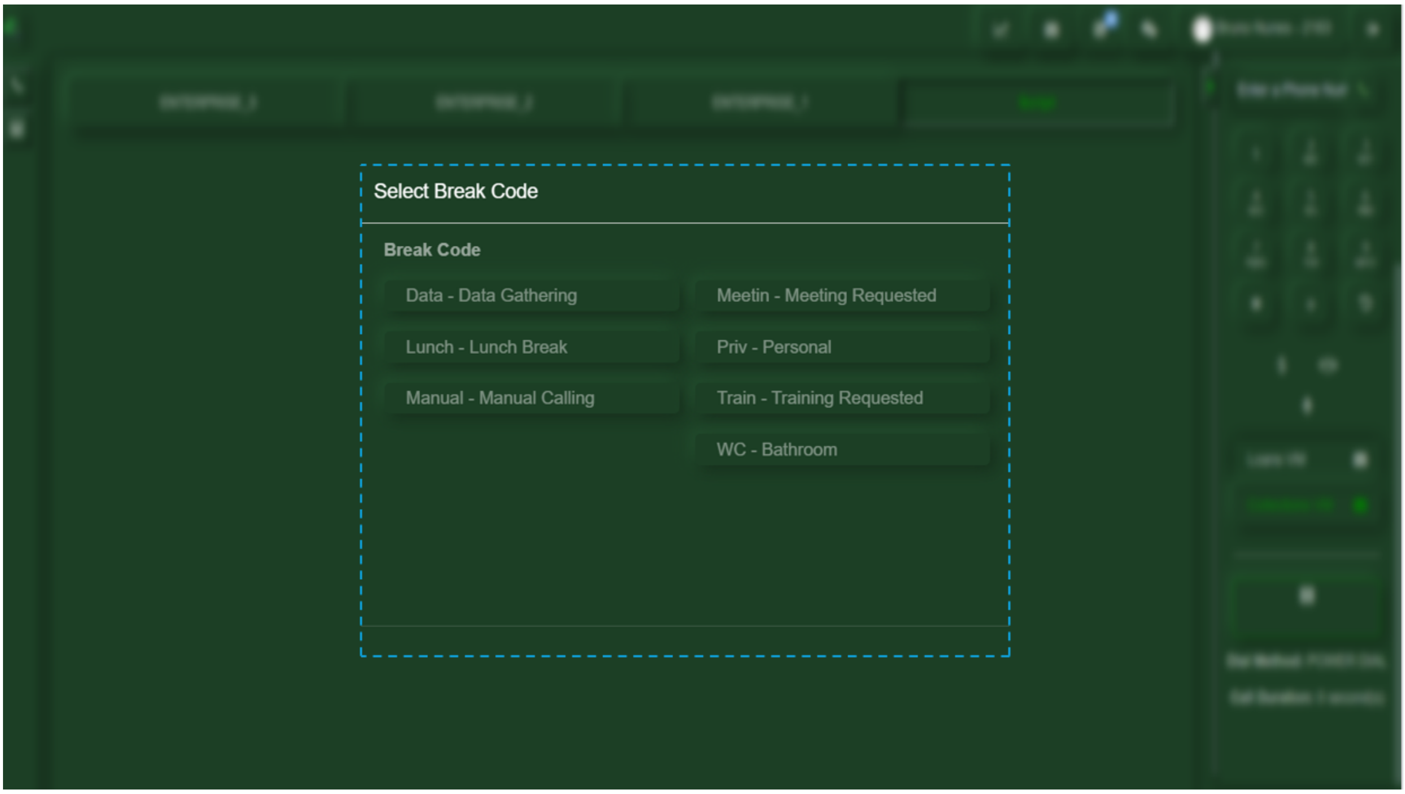
After logging in, you will need to log into the campaign that has been previously assigned to you by a supervisor. If the assigned campaign is not correct, please notify your supervisor.



If you are ready to start receiving calls, you only need to press the **Play** button. If you need to pause for a break or any other reason that requires you to stop receiving calls, simply scroll down slightly on the screen and select the **Pause** button. Upon clicking it, a menu will appear where you must select the reason for your break.


NO LIVE CALL




Select Break Code
Break Code
Data - Data Gathering
Meetin - Meeting Requested
Lunch - Lunch Break
Priv - Personal
Manual - Manual Calling
Train - Training Requested
WC - Bathroom

Status & Control Bar

Within the main user interface, you will find several available options:

1.My Stats
Displays your activity metrics, including: First Activity, Last Activity, Login Time, Total Calls, Break, Pause, Available, and Talk time.

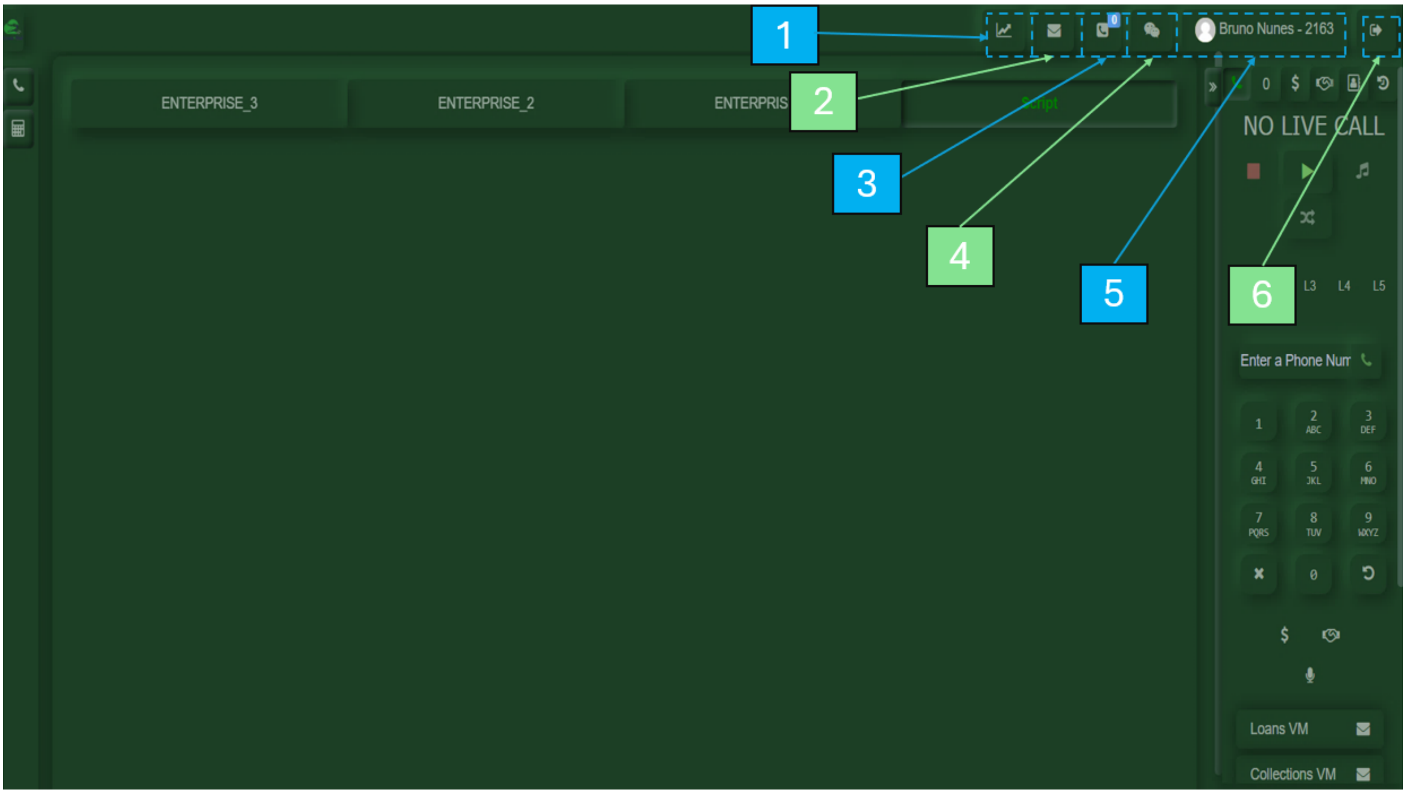
2.Voicemails
Shows the voicemail messages received in your account.

3.Callbacks
Displays calls returned by customers.

4.Chat
Your personal chat for communication.

5.My Profile
Allows you to view your name, interface color, and other personalization settings.

6.Logout Button
Used to sign out of the system.

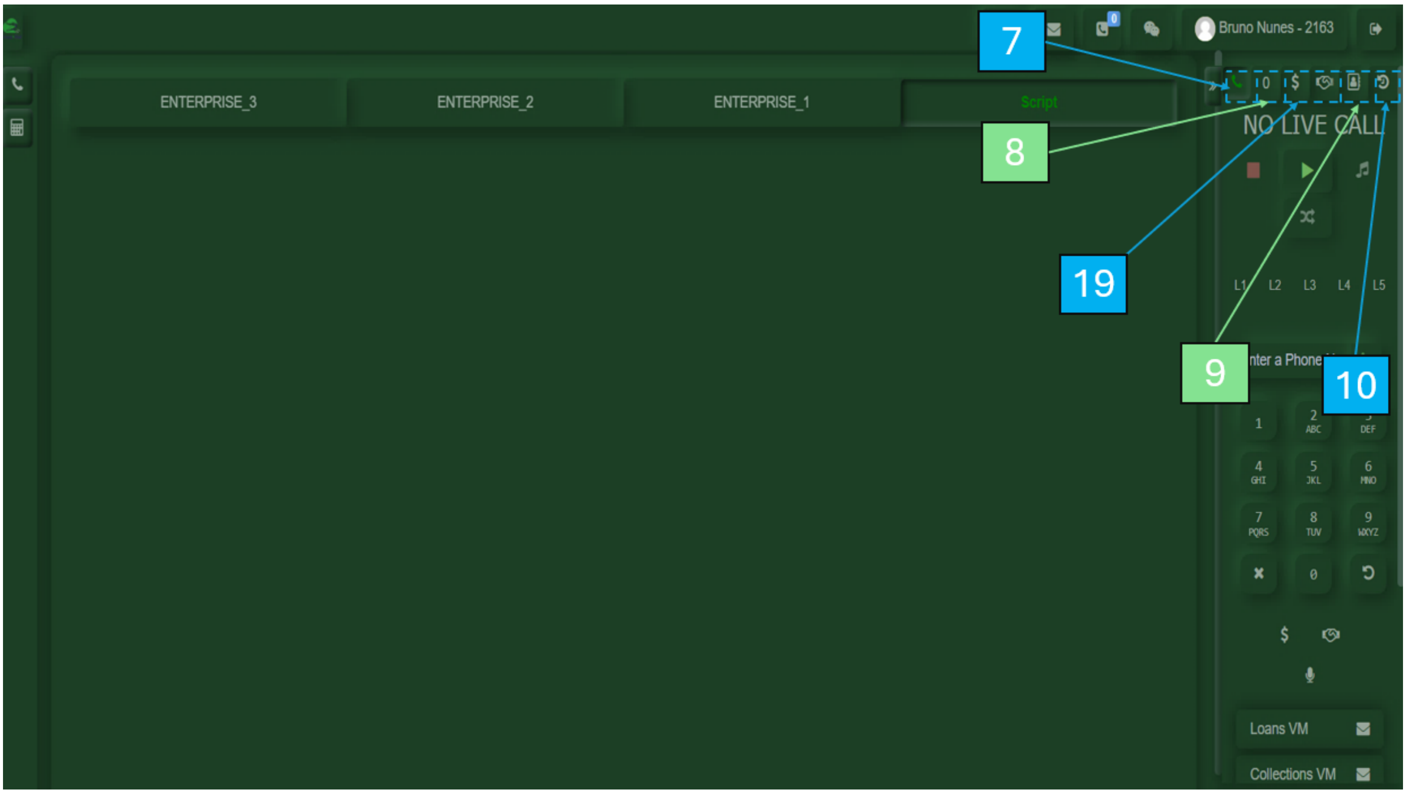


7.Call Menu Button
Returns you to the call interface to continue handling calls.

8.Call Queue
Displays customers waiting in line to be attended.

9.Phonebook
Contains a list of saved contact numbers for different needs.

10.Call History
Records all calls made, including the numbers dialed.



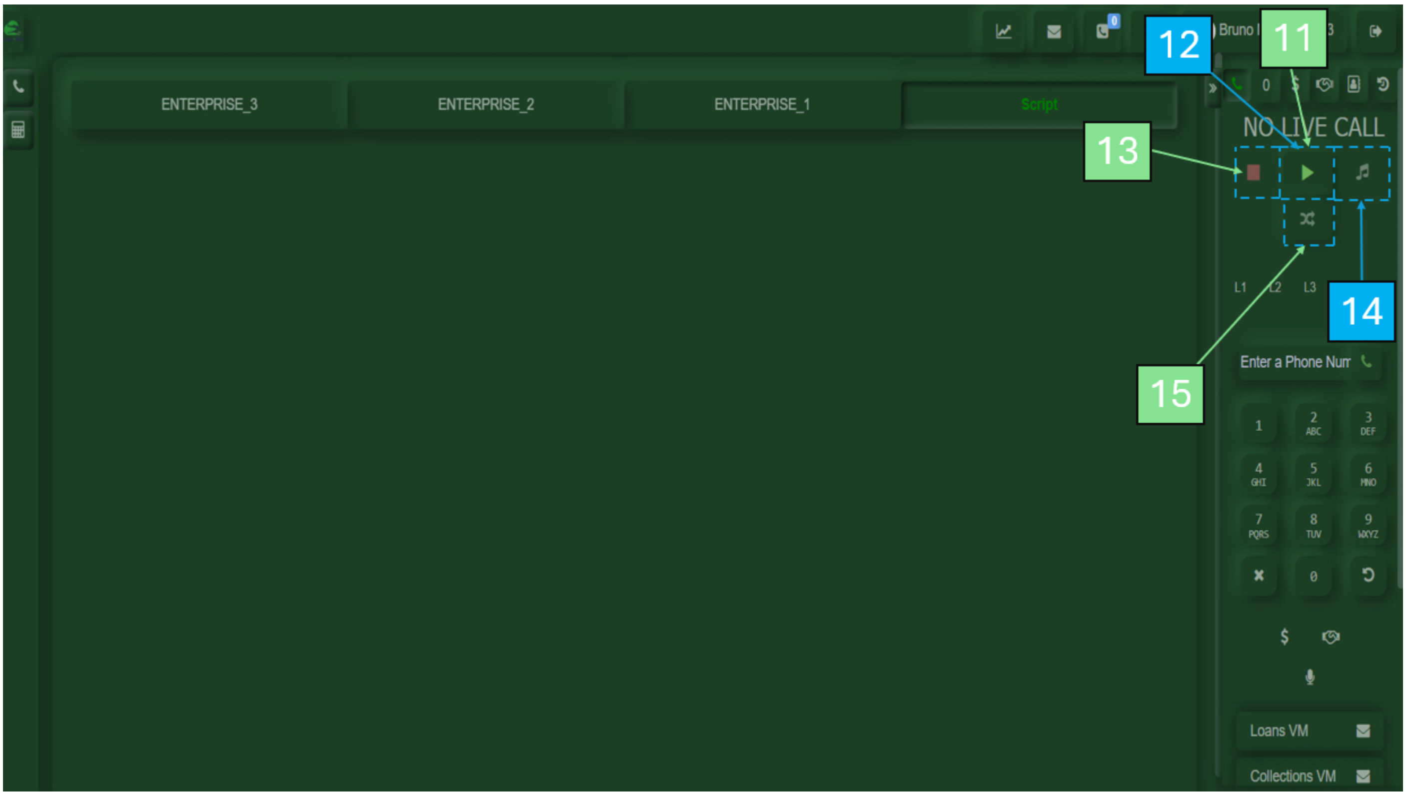
11.Play Button
Used to start receiving calls.

12.Pause Button
Appears after pressing Play or by scrolling down. Allows you to take a break and select a reason.

13.Hang Up Button
Used to end the current call.

14.Hold Button
Used to place the customer on hold.

15.Transfer button
This button allows you to transfer the current call to a colleague.



16.Call Line Management
Allows you to manage multiple call lines, including placing customers on hold while handling others.

17.Manual Call Option
Allows you to place a call by entering the customer's number.

18.Dial Pad
Numeric keypad used for dialing.

19.<u>Call Transfer Buttons</u>
Used to transfer calls to departments such as Loans or Collections. Also available at the top before initiating a call.

20.Mute Button
Used to mute your microphone during a call.

21.Voicemail Broadcast
A pre-recorded message sent to the customer's voicemail.

22.Break Time Indicator
Shows how long you have been on break.

23.Dial Method
Displays the current dialing method.

24.Call Duration
Shows the duration of the current call.