Agent Interface

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

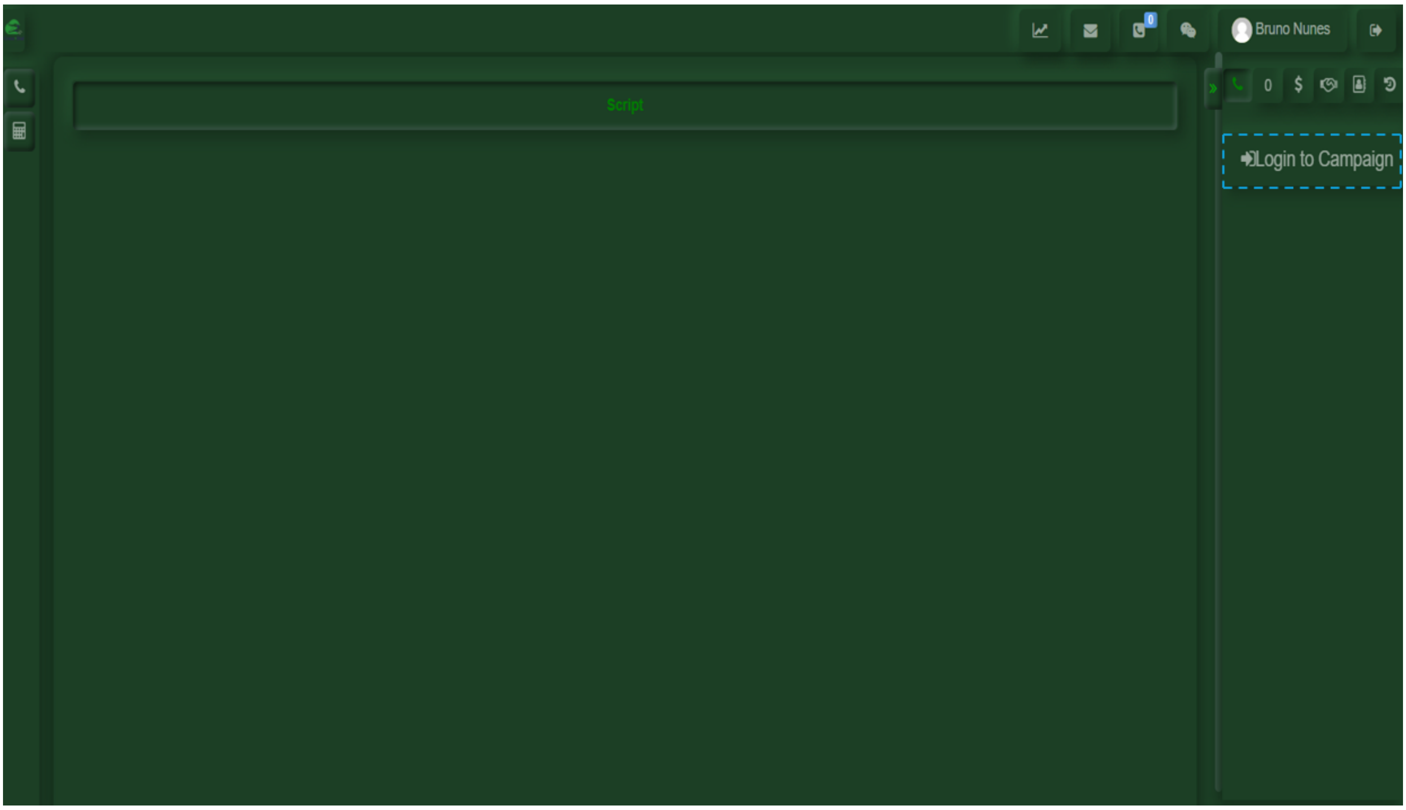
- Agent selects outcome
- Adds notes
- Schedules callback if needed

Step 7: Next Call Cycle

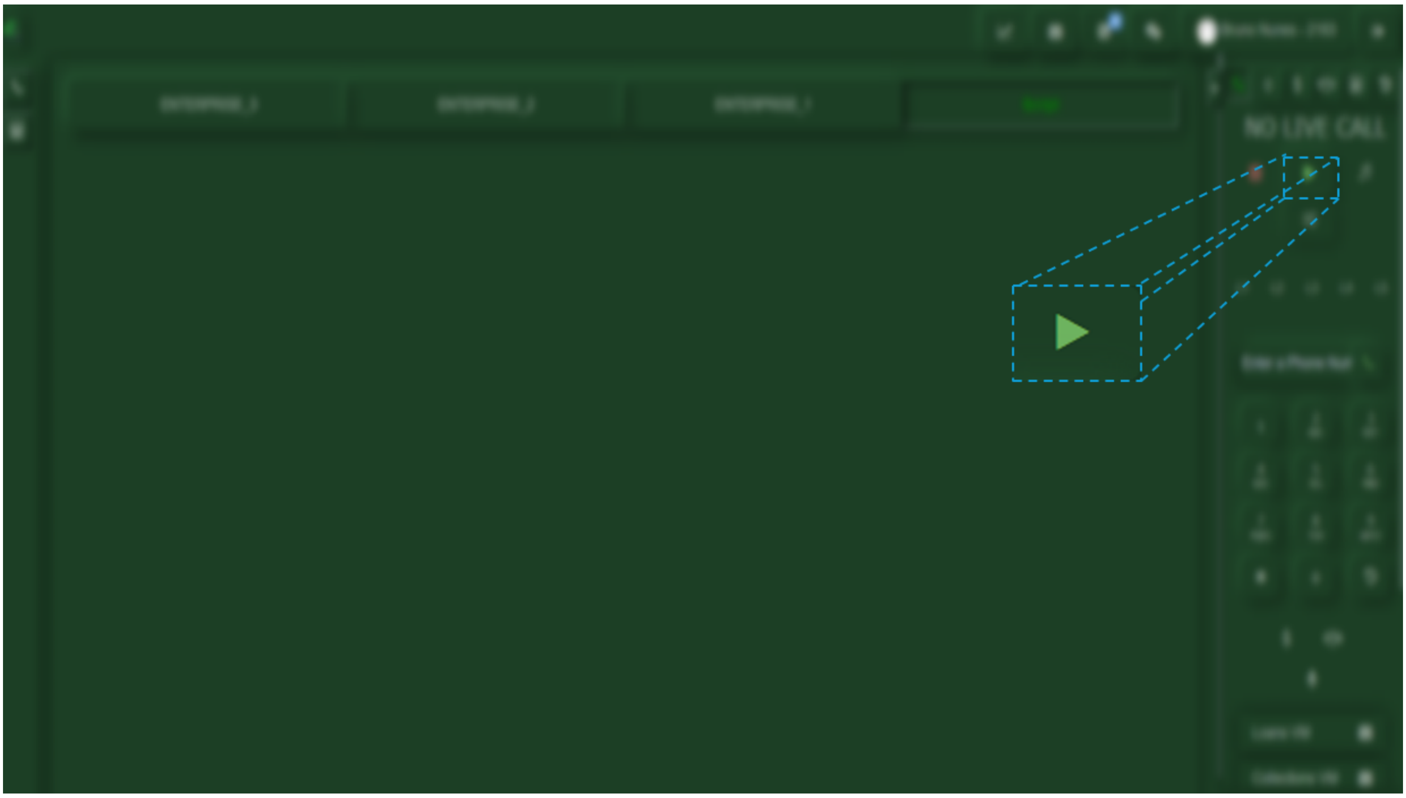
- Agent returns to:
  - Ready (auto o manual)
- Next call is delivered

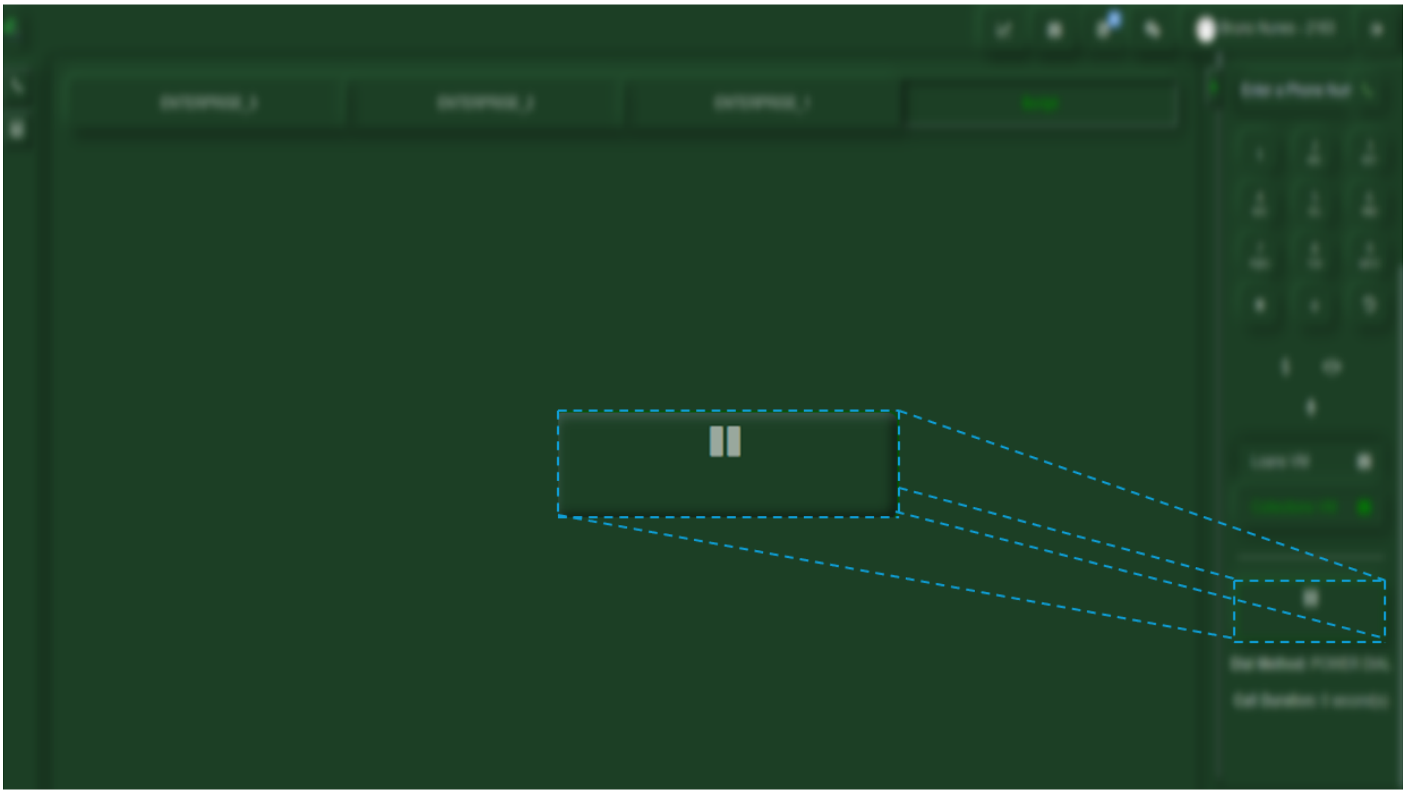
Login & Setup

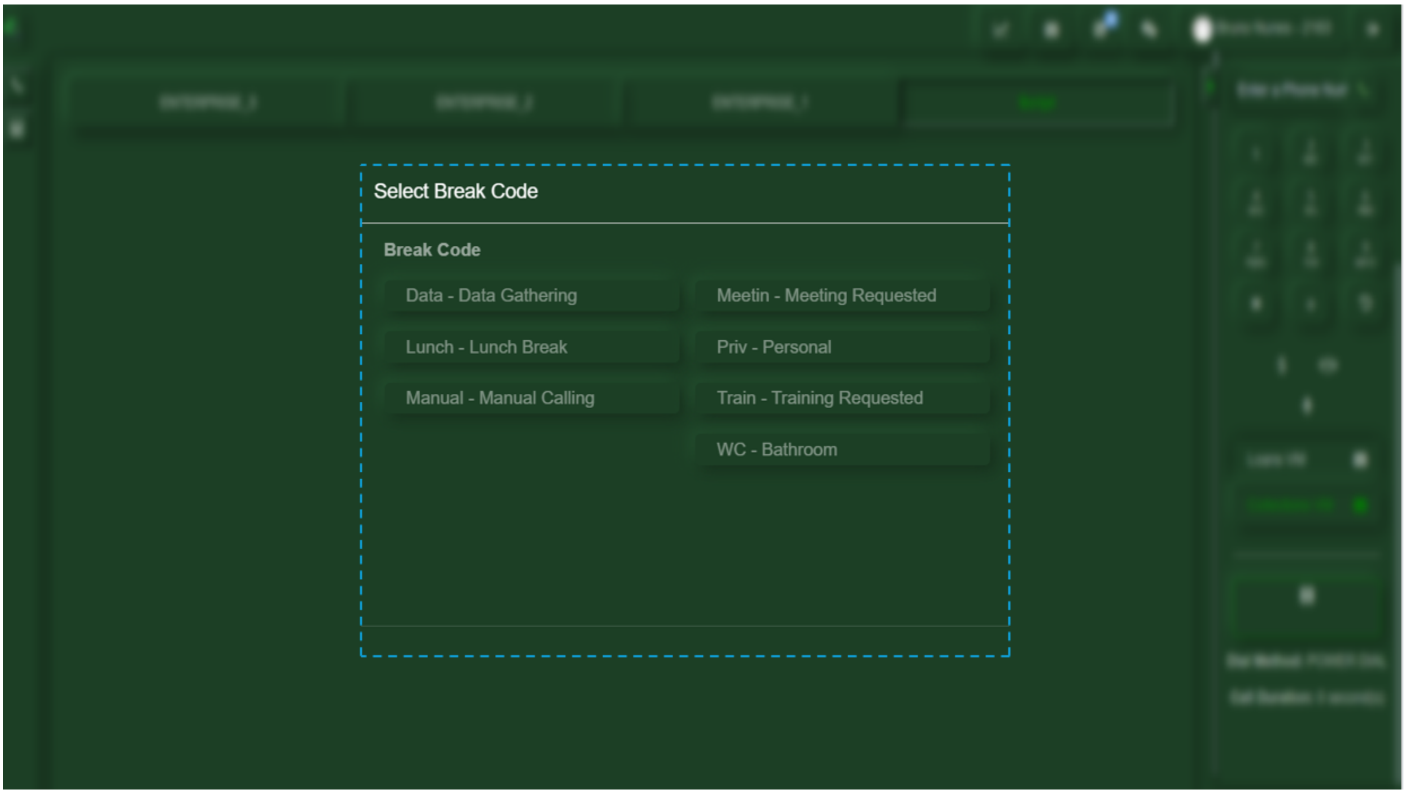
After logging in, you will need to log into the campaign that has been previously assigned to you by a supervisor. If the assigned campaign is not correct, please notify your supervisor.



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

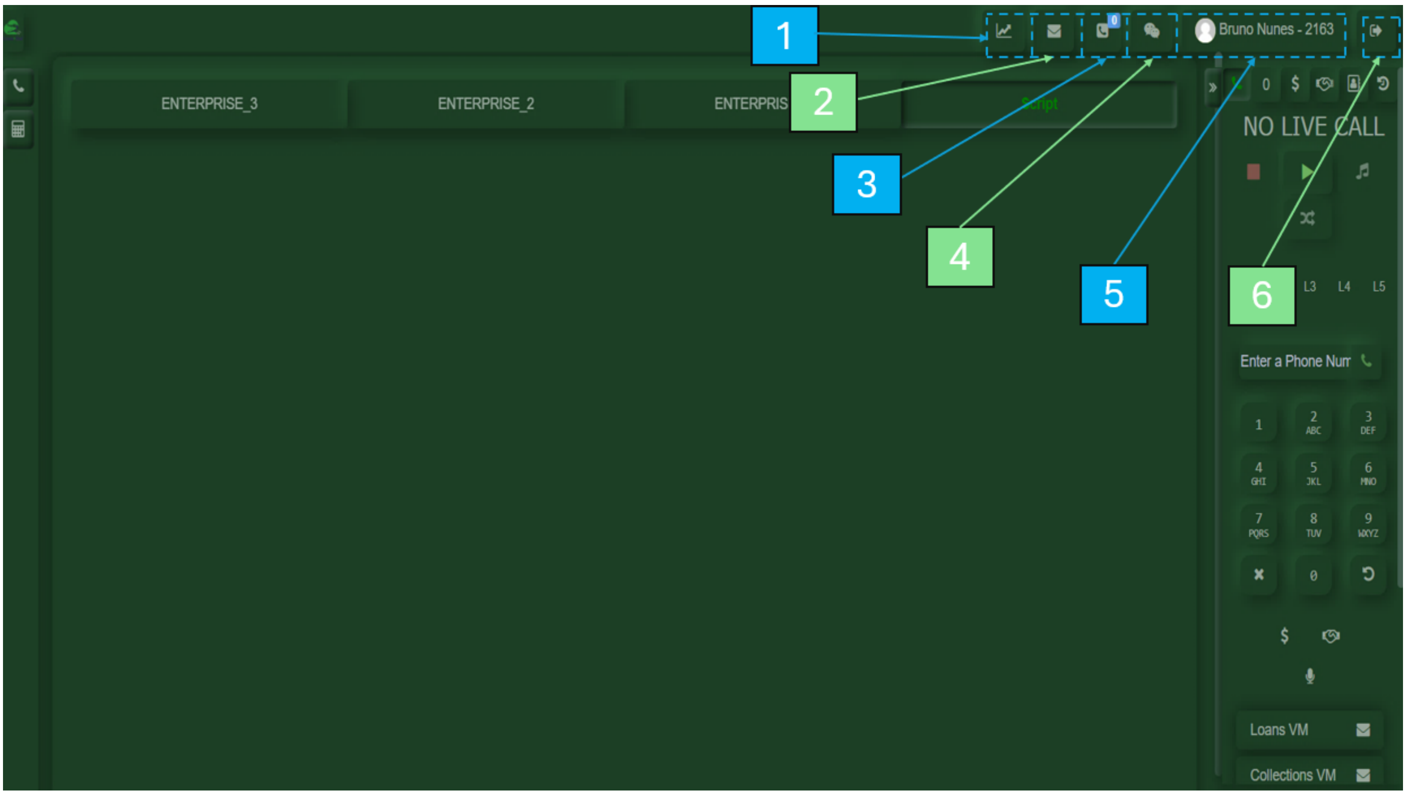
2.Voicemails
Shows the voicemail messages received in your account.

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.

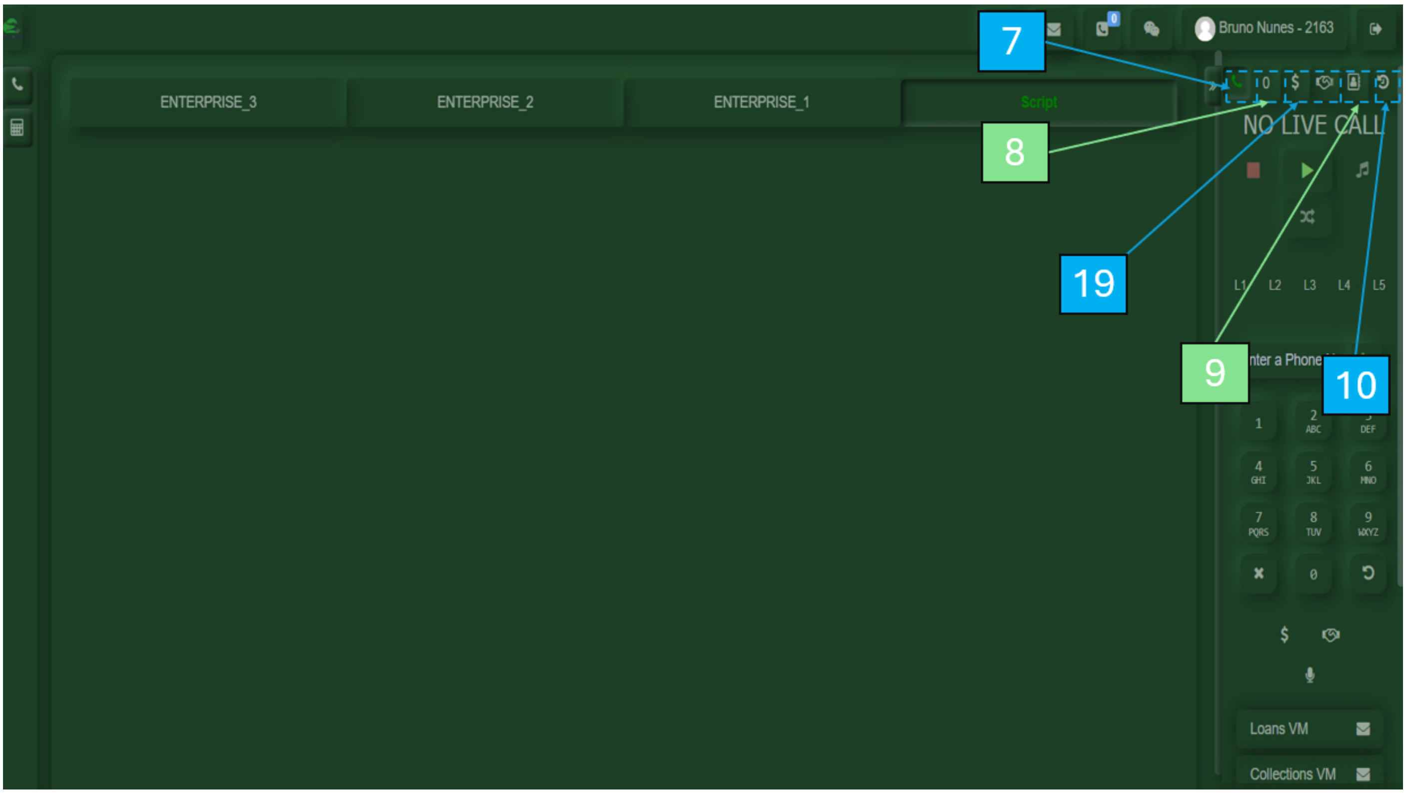


7.Call Menu Button
Returns you to the call interface to continue handling calls.

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.



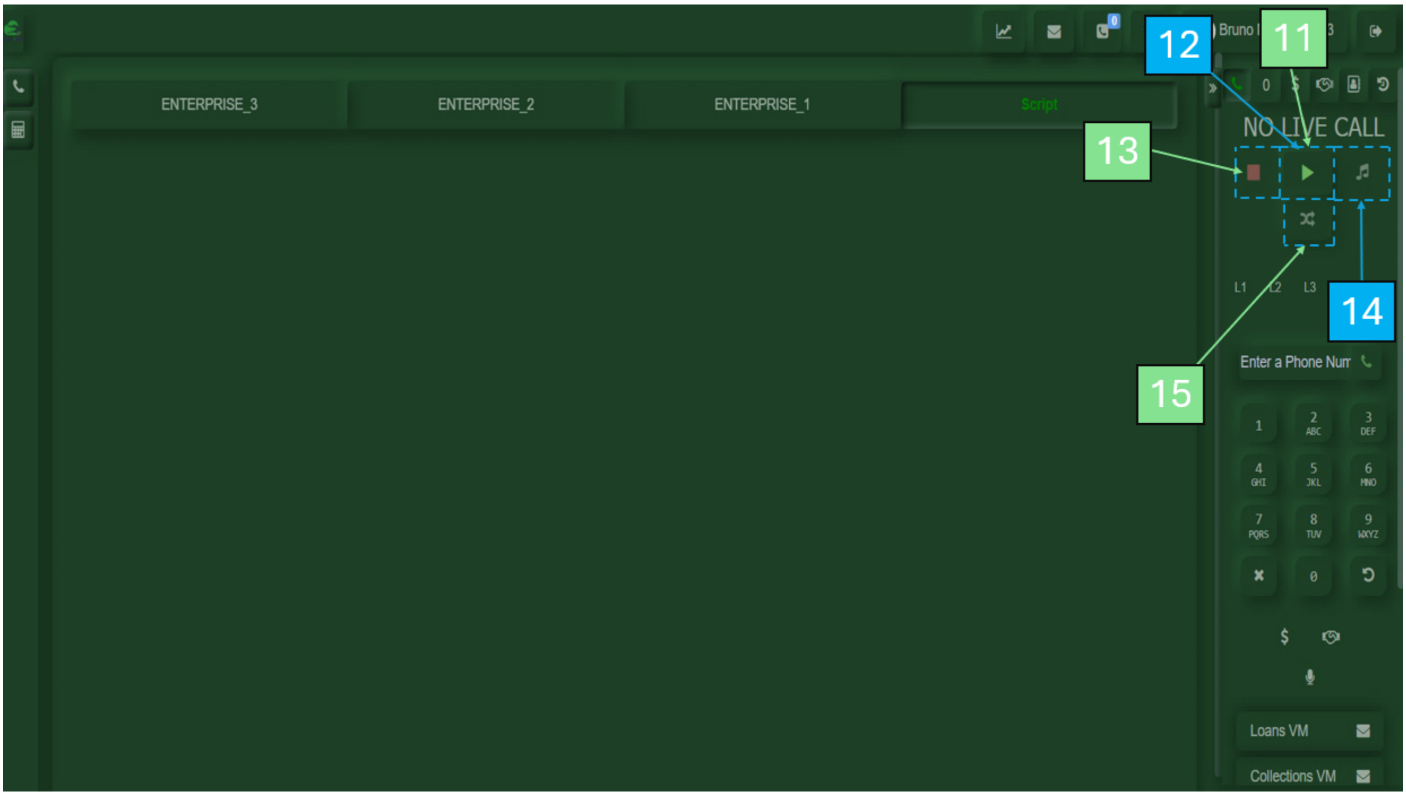
11.Play Button
Used to start receiving calls.

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.

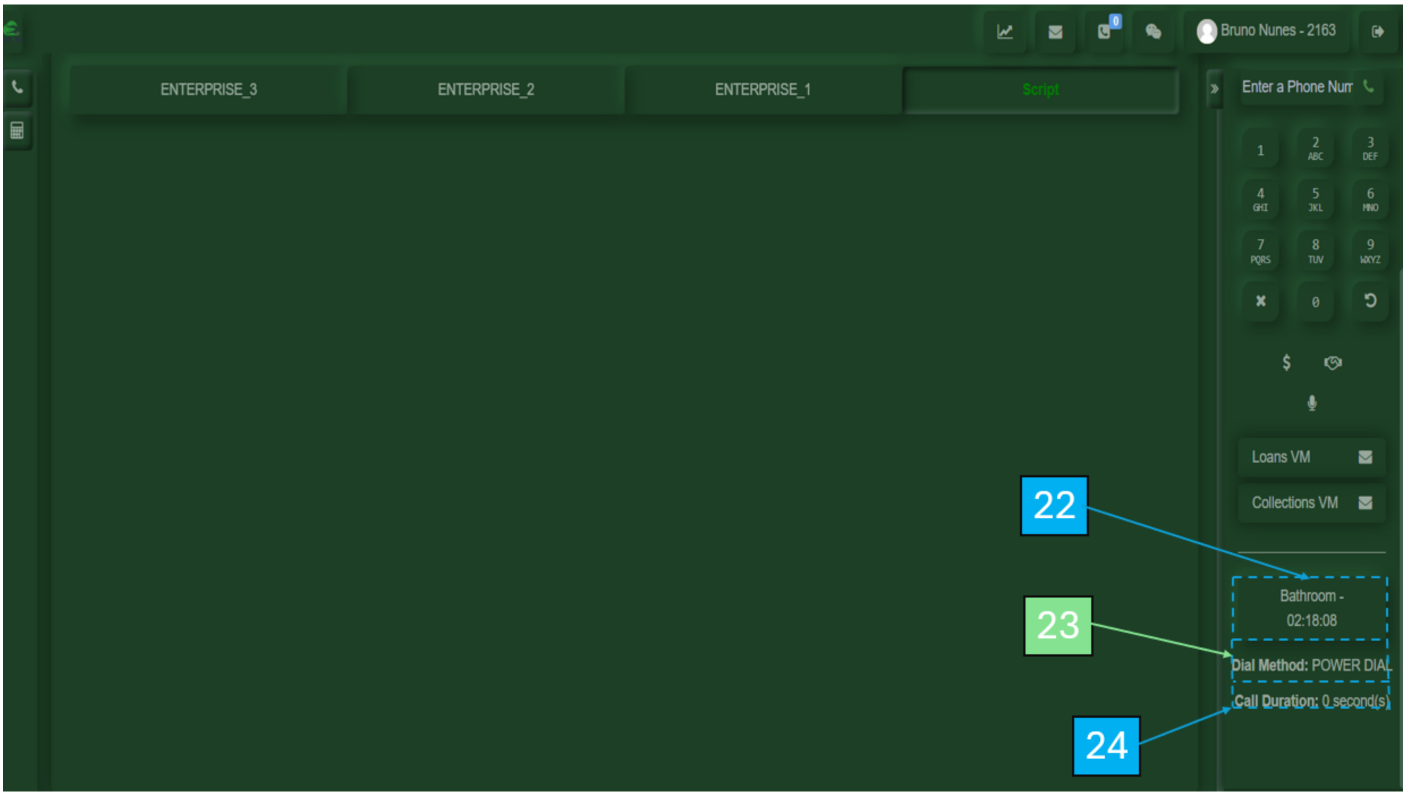
20.Mute Button
Used to mute your microphone during a call.

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.

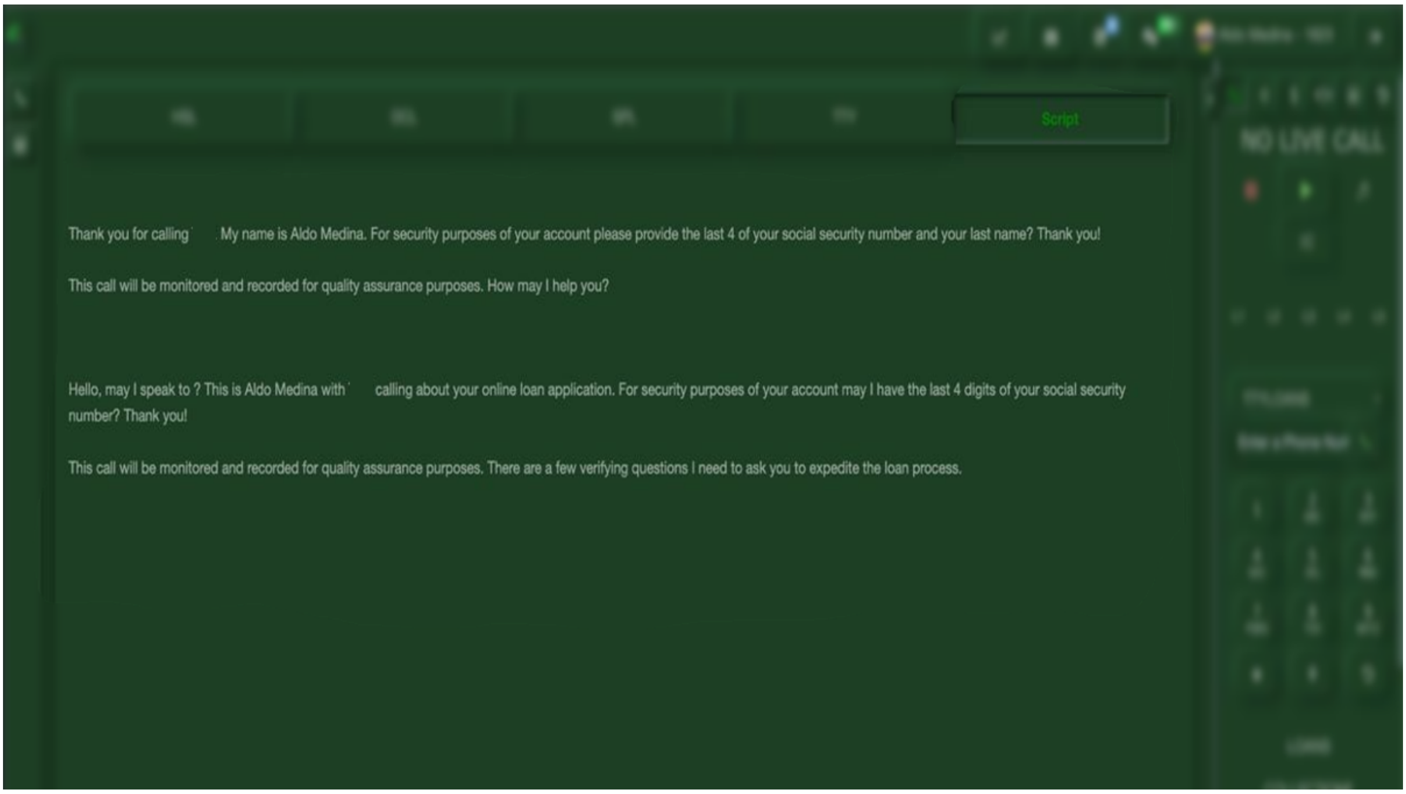
24.Call Duration
Shows the duration of the current call.



Script / CRM Panel

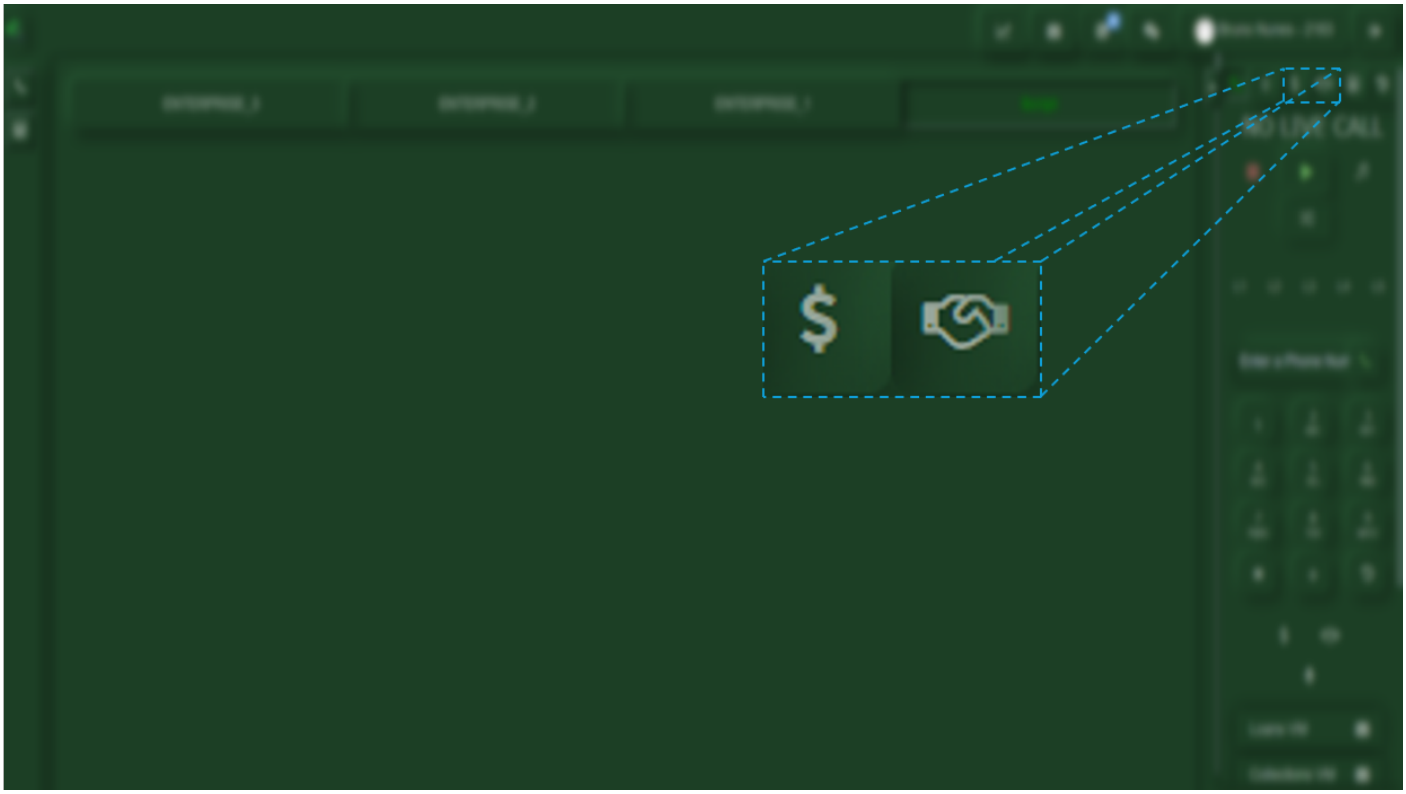
This section defines the tools available to agents during interactions, allowing them to access information and capture data efficiently.

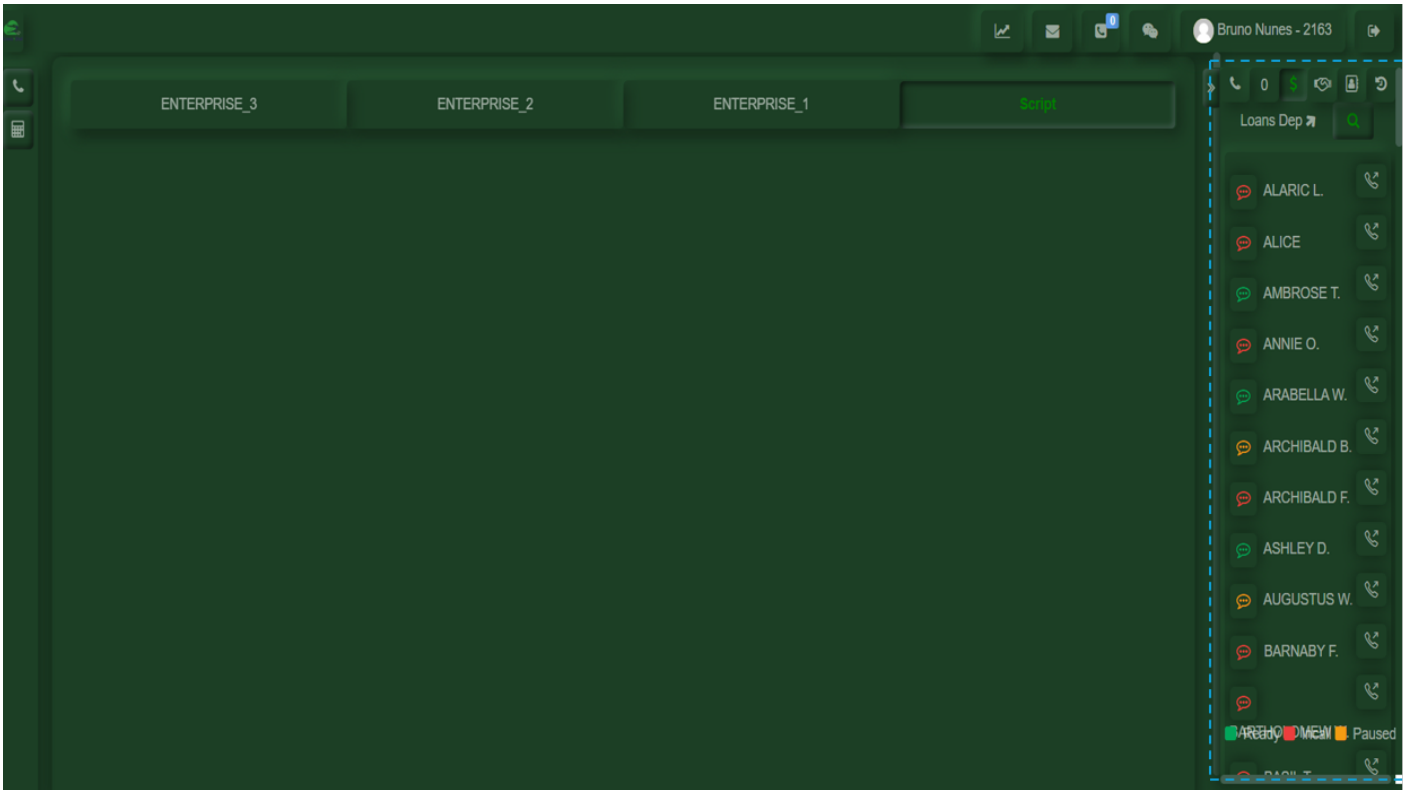
- **Dynamic Script**
  Provides adaptable call scripts that change based on the interaction, guiding agents through conversations.
- **Forms**
  Allows agents to input and manage data in real time during the call.
- **CRM Integration (iframe or native)**
  Enables access to CRM systems either through embedded views (iframe) or direct native integration within the platform.



How to Transfer a Call

To transfer a call, the first requirement is to be on an active call. Then, in the upper right section—above the pause or resume call option—you will see two buttons: one with a dollar symbol and another with a handshake icon. To proceed with the transfer, you will see the available users, each with a phone icon next to them.



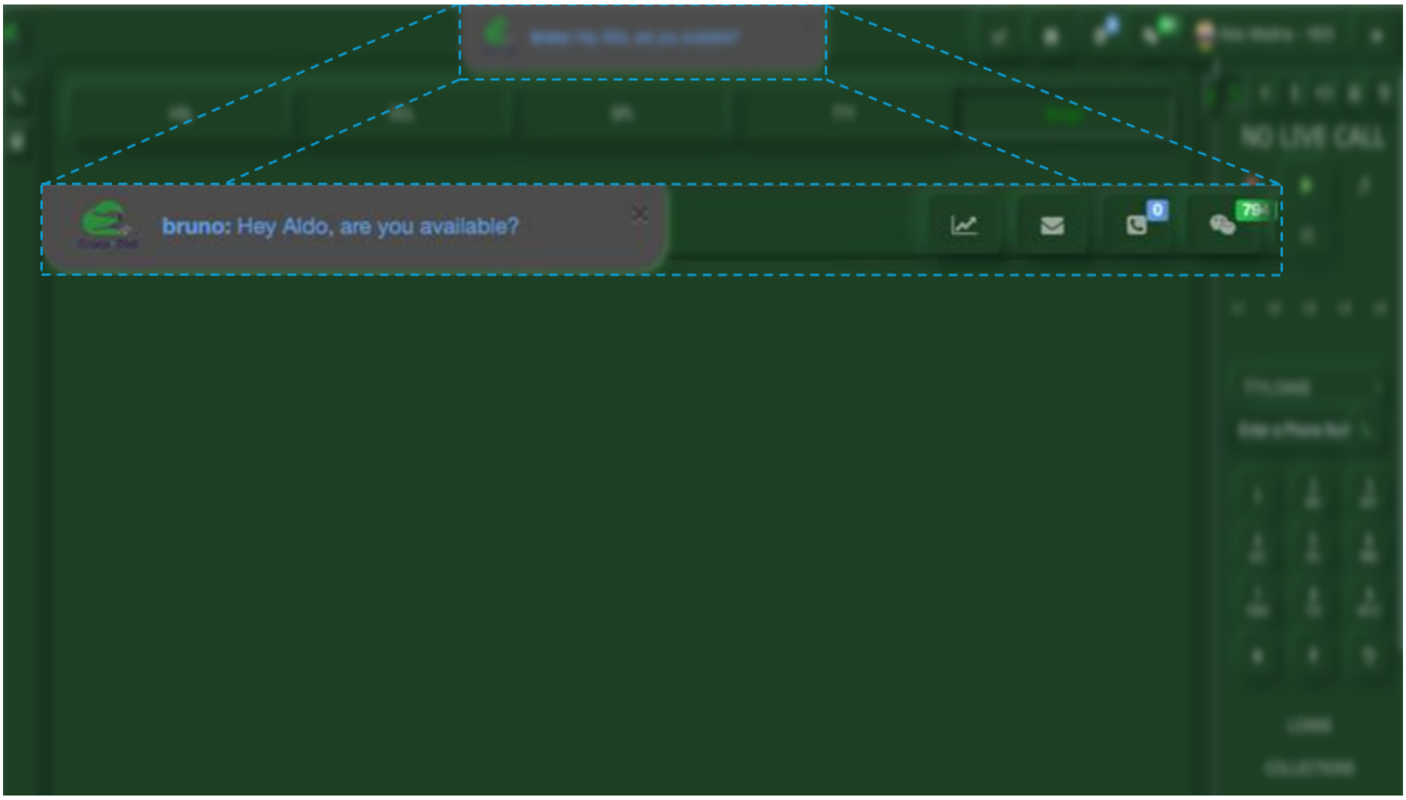


Bruno Nunes - 2163
ENTERPRISE_3
ENTERPRISE_2
ENTERPRISE_1
Script
0
Loans Dep
ALARIC L.
ALICE
AMBROSE T.
ANNIE O.
ARABELLA W.
ARCHIBALD B.
ARCHIBALD F.
ASHLEY D.
AUGUSTUS W.
BARNABY F.
Paused

Notifications / Alerts

This section defines how the system communicates important information to users during operation.

- **System Messages**
  Provide general information about system status, updates, or actions performed within the platform.
- **Campaign Alerts**
  Notify users about specific events or conditions within a campaign, such as performance issues or configuration warnings.
- **Errors**
  Inform users about problems or failures within the system, helping identify and resolve issues quickly.



Dashboard / Stats

This section provides key performance metrics that help monitor agent activity and campaign effectiveness. These indicators allow supervisors and agents to understand performance, availability, and overall productivity in real time.

Below are the main metrics displayed in the **My Stats** section:

- **First Activity**
  Indicates the time when the agent performed their first action in the system (e.g., login, status change, or first interaction).
- **Last Activity**
  Shows the most recent action performed by the agent. This helps track current engagement and activity.
- **Login Time**
  Total time the agent has been logged into the system during the session.
- **Total Calls**
  Displays the total number of calls handled by the agent within the current session or selected period.
- **Break Time**
  Tracks the total time the agent has spent on break (intentional pauses such as lunch or rest).
- **Pause Time**
  Represents the total time the agent has been in pause status, meaning not receiving calls. This may include breaks or other non-available states.
- **Available Time**
  Indicates the total time the agent has been available to receive calls.
- **Talk Time**
  Measures the total time spent actively talking on calls. If no calls have been handled, this value will remain empty or at zero.
- **Calls Handled**
  Displays the total number of calls managed by the agent or campaign within a given period.
- **Conversion Rate**
  Indicates the percentage of successful outcomes (e.g., sales or completed objectives) compared to total calls.
- **Pause Time (Detailed)**
  Tracks how long agents remain inactive or unavailable for calls.