Contivio

1. User Bar

Your Name — PC Extn: 1055 — IP: 108.66.220.163 — Help

User Status – Set your status to let your team know if you're available

- Ready
- Busy
- Log Out
- On Break
  - Coffee
  - Lunch
  - Personal Call
  - QA Session
  - Work Meeting

Minimize App to Menu bar

Switch Modes to Toolbar Version

Help Link takes you to the Contivio help center

PC Extn is your direct extension for other agents to dial you.

IP is your IP address

Busy & On Break – No inbound media sent to user

Custom Work Break Statuses Configured by Administrators in the Admin Portal

2. Supervisor Bar

From Left to Right

Stop Monitoring – For Supervisors to stop monitoring a live call

Supervisor Whisper – For Supervisors to Coach users

Supervisor Barge-In – Interrupt a call

Start Recording – Manually record a call

Stop Recording – Manually stop recording a call

Wrap Up – Extend your wrap-up period to finish notes

Identity – Set your outbound caller ID

Category – Set your primary queue or campaign

Play Audio – Insert an audio recording into call

Work Status – Live contact center statistics by *Agent*, *Queue*, and *Campaign*

Mute

3. Telephony Bar

8002828105

From Left to Right

Telephony Keypad: 1 2ABC 3DEF 4GHI 5JKL 6MNO 7PQRS 8TUV 9WXYZ * 0 #

Telephony Keypad Mouse click number to dial or use number pad on keyboard. The keypad is good to use for extensions.

Call Answer – Accept call

Call Hold – Place call on hold or park for another Queue via transfer

Call Conference – Add up to 5 additional participants to the call

Call Transfer – Warm or cold transfer of a call to a *Queue* or *User*
- Warm Transfer: place call on hold, contact 3rd party, connect/transfer call, make introductions
- Cold Transfer: dial extension/number, connect/transfer call automatically to 3rd party

Call Hang Up – End call

Voicemail – Listen to voice messages
X:Y – unheard : saved

4. Media Display Window

3476454555 Sales — 00:00:30
Sales — Caller ID — Queue — Call Duration/Timer

3476454555
Media Type — Outbound — Hold — End Call or Media
Inbound — Message

5. Media Notification Pop Up

Media Notification Pop Up – Click Accept to accept the call or media, click Decline to decline the call or media.

Settings can be adjusted under "Settings" tab.

Incoming voice call: 7149045440 (West Coast General)
Accept — Decline

6. Directory List (Phone Book)

- Singapore mem.. — Queue
- South America ..
  - Peter Youssef (1015) — Users/Agents
  - Tabaitha Brymer (1213) — Transfer
  - James Astwood (1060) — Call — Monitor
- New Zealand me..
- West Coast me..

Status

7. Contact Center Side Bar

Call Information — Dismiss

Caller/Message ID

Disposition — On Hold

Disposition Preconfigured drop-down options

Notes from transferred call...

Notes — User comments to push to CRM

After you click on the dismiss button, your notes and disposition will be stored in the company's CRM or database.

Search — Customer ID — Search

Contivio U.. — ID 3476454555

- 23/3/2018 23:33:44 - Siddharth Chatterji
- 23/3/2018 23:33:25 (Sales) - Valerie Stokes
- 22/3/2018 19:42:35 (Sales) - Valerie Stokes
- 22/3/2018 16:32:15 (Sales) - Siddharth Chatterji
- 22/3/2018 16:31:57 (Sales) - Valerie Stokes

From Left to Right

Inbound / Outbound	Media (SMS, Voice, Chat, Email)	Contact ID (# or Email)	Date & Time
Missed			

Recent & Scheduled Calls

Recent Calls — Scheduled Calls

- Valerie Stokes 26 Mar 2018 15:25:28
- 9179338644 26 Mar 2018 14:01:57
- 7345127780 26 Mar 2018 6:46:56

From Left to Right

Inbound / Outbound	Media (SMS, Voice, Chat, Email)	Contact ID (# or Email)	Date & Time
Missed			

Chat — Chat messaging portal

Valerie.. — 00:00:23 — Contact and Duration

Canned Answers — Transfer

Valerie Stokes 15:24:56
Hi I have a question about pricing.

Valerie 15:25:44
Sure, happy to help. Have you checking out our pricing page on our website?

Chat message log

Chat message reply box

Messages — Compose, Send & Track

Instant — SMS — Fax — Email

Send Message — Drop down list of users to message

Message/Reply box to one or Multiple Users — Send

Received: Thu Feb 27 21:41:53 GMT 2014
From: Tabaitha Brymer

From Left to Right

Media	Inbound Outbound Indicator	Date/time Stamp

From: Contact

Scripts — User/Agent Questionnaire

Script Name — Sales Script

Thanks for calling. Would you like to place a new order or discuss an existing order?

Existing Order

Notes

Done — Next

Call Scripts A predefined, question tree with drop down options and dependent results

Questions List:
- Thanks for calling. Would you ...
- Our pricing model is quite sim ...
- Have a nice day.
- Hi this is <name> with custome ...
- What is the nature of your cal ...

Personal Voicemails — Refresh

- 10011035 - 14:26:22 08 Mar 2018
- 10011035 - 15:29:07 06 Mar 2018
- 10011035 - 15:28:20 06 Mar 2018

From Left to Right

Unheard	Number or Extension	Date/time Stamp
Saved	(E.g., Queue ID + Extension)	

Work Assignment — Active Queues

Activity	CRM Profile	POP
East Coast G..	MSAccountI...	✗
East Coast S..	DynmamicsC...	✗
East Coast S..	MS2013_Lea...	✗
Contivio Acc..	SF_RecordI...	✓
Sacramento G..	SF Demo Ac...	✓
Sacramento S..	SF Chat	✗
Sacramento S..	SF Email P...	✗
Sacramento S..	DFAccountC...	✗
Sacramento S..		
Sacramento S..		
Sacramento S..	AccountID	✗
Sales Campai..	SF CLI	✓

From Left to Right

Assigned Queue	Media	Screen Pop	Assigned Screen Pop

Directory List icons

- Irvine Sales (1002)
- JCurve (1042)
- Miami Services (1004)
- Nancy Queue (1057)
- Inside Sales
  - Kent Michaels (1010)

Ready 00:00:29
Irvine Sal..

8 a. Audio Settings

Audio Settings — Configure Headset

Speaker	Speakers (Realtek High Definition Au ▼)
Microphone	Microphone (Realtek High Definition ▼)
Local Ring	Select audio settings that match your headset or headphones — OFF	ON — Turn off ringer

8 b. Call Handling

Call Handling — Manage Calls & Automation

Offline Phone	[_____] ✓ Update	
Direct Calls Forwarding	Forward calls to Phone or Voicemail	
All Calls	Do not forward ▼	Select drop down option for each scenario
Busy	To Voicemail ▼	
Un-answered	To Phone ▼ [___]	
	✓ Update	✗ Cancel FWD
	Save Changes	Cancel Changes

Missed Calls

Switch to Busy: After 1 missed calls ▼

Automatically switch to *Busy* status so no calls are offered to you

Auto Answered Calls

Answer: After 3 seconds ▼

Automatically answer calls after a certain amount of ring time

Automatic Play of Audio Files

Off ▼

Automatically play pre-recorded audio script to a caller before engaging.

8 f. Security

Security

Old Password	[_____]
New Password	[_____]
Confirm Password	[_____]
	✓ Update

Change your password here by typing in your old one, and new one.. Keep in mind IP phone users need numeric passwords

---

Settings (center panel)

PC Extn: 1055 Help
IP: 108.66.220.163

Your Name

Ready 00:00:29

Irvine Sal..

Settings

- (a) 🔊 Audio Settings
- (b) ↪ Call Handling
- (c) 🖥 CRM & Call Data
- (d) ⤢ Phone Position & Notifications
- (e) 📞 My Connected Phones
- (f) 🔒 Security
- (g) 🔗 Customer Support
- (8)

---

8 c. CRM & Call Data

CRM & Call Data — Manage CRM Interactions

Screen POP — Configure screen popping behavior

Preference	Enabled for voice only ▼
Time	After I accept the contact ▼
Personal Calls	MSCustomAccount ▼
Browser	Google Chrome ▼

Post Wrap-up — Push data to CRM immediately — OFF | ON

Keeping call information after automatic wrap-up ends; I will dismiss the call manually when I am done. E.g., Keep Call Dispositions

8 d. Phone Position & Notifications

Phone Position & Notifications — Manage App & Alert Positioning

Always on top — Grant window position priority	OFF	ON
Display notifications inside Contivio client — Permit media alerts to appear in the App	OFF	ON
Display notifications on desktop — Permit media alerts to appear in outside of App	OFF	ON

8 e. My Connected Phones

Settings

My Connected Phones

1035@contivio.com
[108.- - - - - ---] ↪

This Contivio Softphone
[108.- - - - - ---]

↻ Discover

Here you can see which phones you are logged into and you the ability to sign out.

Click the red arrow to log out.

IP Phone Shortcut Commands

Action	Commands	Commands with Prompts	Example	Comments
Login	*1	*10	*1 1005 123456	User/Agent extension followed by password (pin)
Logout	*0	*00	*0	
Do Not Disturb	*2	*20	*2	
Break	*2	*20	*2 35	Break codes and break types are configured by call center admin
Ready For Calls	*3	*30	*3	
Pickup Any Ringing Phone	*4	*40	*4	Can pick-up and ringing call from queues. This is not applicable for personal/direct calls
Pickup Specific Ringing Phone	*4	*40	*4 1007	Target phone extension is specified. Can pick-up and ringing call from queues. This is not applicable for personal/direct calls
Voicemail & Call Forwarding	*5	*50	*5	• Press "1" to listen to voicemail • Press "2" to record personal greeting. • Press "3" to set up call forwarding
Dial-out Using the Primary Contact Center Number	*67		*67	Dial these digits without a number following. You will hear an audio prompt confirming the Caller ID switch
Call Diversion On	*88		*88 917-484-6954	Incoming call diverted to the Offline Phone Number or the number following the *88, if agent has permission. Note. *88 needs to be reissued if logged out and back in for it to work.
Call Diversion Off	*89			Call are received on the phone they are logged into.
Call Transfers	Transferring calls depends on the IP Phone, see instructions specific to your IP Phone to action			Cisco IP Phone - *Trnsfer* key

8 g. Customer Support

Settings

Customer Support

Software Version	Ver: 10.0.2-C9.0.8

Diagnostics

Remote Diagnostics — OFF | ON

Allows contivio to remotely retrieve Contivio application information such as; Contivio application log files, SIP logs and list of recording file names.

Report an Issue

Your Email	[Input your Email Address]
Issue Type	Login ▼
Description	Pick from the drop down list the feature that best describes the issue your experiencing

Enter a detailed description of the issue including the following:
- What is happening, What do you expect to happen
- Can you make it happen again? Random?

SLA – A Support Agent will contact you with a ticket ID and access to our support portal for tracking

✉ Submit