1. User Bar

From Left to Right

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

Category – This shows the queue or campaign you are logged in as.

Ready – You are available to take inbound calls and media

Busy & On Break – No inbound media sent to user

Custom Work Break Statuses Configured by Administrators in the Admin Portal

2. Media Display Window

Caller ID

Queue Call Duration/Timer

Outbound

Media Type

Hold

Inbound / Outbound / Message

End Call or Media

5. Media Notification Pop Up

Incoming voice call: 7149045440 (West Coast General)

Accept | Decline

Click Accept to accept the call or media, Click Decline to decline the call or media.

Settings can be adjusted under "Settings" tab.

3. Telephony Bar

From Left to Right

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

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

Mute – Extend your wrap-up period to finish notes

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

Dial Bar
The dial bar all the way to the left allows you to search for other agents, find a speed dial #

4. Supervisor Bar

From Left to Right

Drop-down – Recording & Supervisor Tools

Identity – Set your outbound caller ID

Category – Set your primary queue or campaign

Play Audio – Insert an audio recording into call

Scheduled Calls – View scheduled calls

Voicemail – Call Voicemail unheard : saved

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

Help Link takes you to the Contivio help center

Record

Stop Recording

Whisper

Barge in

Stop Monitoring

Start Recording – Manually record a call

Stop Recording – Manually stop recording a call

Supervisor Whisper – For Supervisors to Coach users

Supervisor Barge-In – Interrupt a call

Stop Monitoring – Stop monitoring a live call

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6. Contact Center Drop Down

Directory List

JCurve (1042)
Miami Services (1004)
Nancy Queue (1057)
Subco - Sales (1050)
Subco - Support (1051)
Inside Sales
Kent Michaels (1010)
Michelle Jones (1009)
Rob Swanson (1007)
Ryan Bradon (1005)
North America ..

Queue

Users/Agents

Transfer

Call | Monitor

Call Information

Dismiss

Caller/Message ID

Disposition — On Hold
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 Missed | Media SMS Voice Chat Email | Contact ID (# or Email) | Date & Time |

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 Missed | Media SMS Voice Chat Email | Contact ID (# or Email) | Date & Time |

Recent & Scheduled Calls

Scheduled — All Available

23 Mar 2018
12:40 3476454555 Check in with Val
16:45 9496464220 Call Joe from Home Depot
17:30 3476454555 Call Jim back

24 Mar 2018
12:30 9492918979 Confirm lunch with Nathan

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 send message

Message/Reply box to one or Multiple Users

Send

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

Clear

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

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 ...

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

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

Saved

Number or Extension (E.g., Queue ID + Extension

Date/time Stamp

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..	✓

From Left to Right

Assigned Queue | Media | Screen Pop | Assigned Screen Pop