**GETTING STARTED**

**LOGGING INTO THE INTERACTION MANAGER**

2. Enter the **Company Alias**
3. Enter your **User Name** and **Password**
4. Click on the **Interaction Manager icon**
5. The login page loading will appear wait while the system logs you in

**MAKING OUTBOUND CALLS**

**MAKING EXTERNAL CALLS**

To call someone who is not a WebCC user you will need to use the **External Call** tab:

1. Click on the **External Call Tab**
2. Enter the area code and phone number you wish to dial
3. Click on Dial and you will be connected to the outside person

**SPEED DIAL**

Speed dial (phone number) lists can now be configured by your WebCC Administration Manager. If Speed Dial (numbers) have been set-up, click on the **Speed Dial** button. From the pop up screen you are able to view lists and then enter speed dial number or select a number from the list to initiate an outbound call.

**MAKING AN INTERNAL CALL (ANOTHER WEBCC USER)**

To make a call to another WebCC user do this:

1. Select the **Company Directory** button in the bottom left hand corner of the IM Call Control Screen
2. From the Company Directory list search for the person you wish to call.

<Note> You can use the filter field to find the person you wish to call. Make sure your click in the relevant list field header row to indicate which field you are searching on. For example, click in the First Name field to tell the system you want to search by first name. Then type the first name into the filter field and click on the filter button.

3. Click on the dial extension or double click on the relevant entry
4. The call will be placed to the other person

**LOGGING OUT OF THE INTERACTION MANAGER**

1. Select the **Logout** button in the top right hand corner of the IM Call Control screen
2. A confirmation box will appear. Select **OK** and you will be logged out

**TRANSFERING CALLS**

**BLIND TRANSFERS (COLD TRANSFERS)**

1. Place the call you wish to transfer on hold using the **Hold** button
2. From the **Interaction Controls** click on the **Transfer To** button and the **Transfer To** box will open
3. From the **Transfer To** box choose who you wish to transfer to from the following options and then click on the **Dial** button

<table>
<thead>
<tr>
<th>Transfer Option</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>To Agent</td>
<td>Click the <strong>Transfer to Agent</strong> radio button.</td>
</tr>
<tr>
<td></td>
<td>Select the relevant agent to transfer to from the list</td>
</tr>
<tr>
<td>To Workgroup</td>
<td>Click the <strong>Transfer to Workgroup</strong> radio button.</td>
</tr>
<tr>
<td></td>
<td>From the list choose the relevant workgroup</td>
</tr>
<tr>
<td>To External Number</td>
<td>Click the <strong>External Phone Number</strong> radio button</td>
</tr>
<tr>
<td></td>
<td>Type in the external number</td>
</tr>
</tbody>
</table>

**SUPERVISED TRANSFERS (WARM TRANSFERS)**

A supervised transfer (commonly referred to as a warm or consult transfer) allows you to dial the receiving person and introduce the call you are about to transfer

1. Place the caller on **Hold**
2. Using the **External Dial** pad or **Company directory** (if another Webcc user) **Dial** the person who will receive the call
3. When the call connects, tell the person you have dialled that you are about to transfer a call and provide any other useful information required
4. Click once with your mouse on the call you wish to transfer (the caller on hold) the **Supervised Transfer** button becomes enabled
5. Click the **Supervised Transfer** button and the call will be transferred

**TIP!** If the **Supervised Transfer** button does not become enabled check you have clicked (highlighted) the call you wish to transfer (the call on hold) with your mouse. See Picture below

**WHERE TO GET ADDITIONAL HELP**

Click on the **Help** button in the top right hand corner of the IM Call Control Screen for a full list of features and functions of IM
Interaction Manager (IM) is a Web-based call control and contact management tool for Contact Centres.

This guide covers working in Off-Hook mode (headset). When working in this mode the phone will not ring; instead, the agent will receive a whisper (beep) in their headset and they will use the mouse or keyboard controls to answer the calls. Please refer to the on-hook guide if the phone is required to ring to notify of each incoming call (interaction).

INTERACTION MANAGER CALL CONTROL WINDOW

The call control window allows you to receive interactions such as calls, make outbound calls and provides the control buttons to control the interaction i.e. Accept, Hold, etc.

WORKING IN HEADSET MODE (OFF-HOOK)

SETTING UP YOUR PHONE TO RECEIVE CALLS

It is important to ensure you enter your correct phone number (the phone at your desktop) as this is where the calls will be delivered.

1. Select the Configure button in the top left right hand corner of the IM screen
2. Click on the Phone tab
3. In the Phone field enter your full phone number (including area code)
4. Select the General tab and ensure the Work Off Hook check box is checked (has a tick)
5. Click on the OK button you will receive confirmation that changes have been successful. Click OK again

TESTING YOUR PHONE AND SETTING UP HEADSET MODE

To check you have entered the correct phone number and the system can reach your phone.

1. Click on the Connect to Server Button in the bottom left hand corner of the screen
2. Your Phone should ring
3. Select the Headset button on your phone to put yourself in head set mode
   <Note> the headset button (Off Hook) will vary on individual handsets. If in doubt as to which button on your phone to press see your Supervisor.
4. Your Phone Icon in the top left hand corner of the IM Screen should now appear in a off-hook position. As shown

   Tip! If you hear dial tone in your headset check the work off hook check box is checked in the IM> Configuration> General Tab>

SETTING YOUR STATUS TO RECEIVE CALLS

Your status tells WebCC whether you are available to take calls. So it’s important that you have the correct status set to enable calls to reach you successfully. Your selected status is displayed in the top left hand corner of the screen.

Statuses are located under the Personal Options tab (bottom right hand corner) of the Call Control Screen. There are 3 buttons (Available, Last Call, Change Status) that allow status selection.

1. Select the relevant status from one of the 3 buttons under Personal Options tab. Descriptions appear below

   <Note> Specific statuses may be available for your organisation under the change status button. Please refer to your supervisor for a description and when to use these statuses

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available</td>
<td>You can receive calls. Set your status to available to receive calls</td>
</tr>
<tr>
<td>Busy</td>
<td>This is a system forced status. You are on a call or the system is presenting a call to you. &lt;Note&gt; you will not receive other ACD calls while in this status</td>
</tr>
<tr>
<td>Last Call</td>
<td>You have selected to be temporarily unavailable to take further calls. Use before choosing a break status</td>
</tr>
<tr>
<td>On Break</td>
<td>You are not available to take calls</td>
</tr>
<tr>
<td>No Answer</td>
<td>This is a forced status by the system because you did not accept the last interaction presented to you. You will not receive any further calls until you change your status back to available.</td>
</tr>
</tbody>
</table>

MANAGING CALLS

ACCEPTING CALLS

1. Select the interaction and press the Accept Interaction button from the Interaction Controls

When a new interaction is waiting to be accepted, it will appear in New Calls window as shown below

   2. The call will be presented through your headset.

PLACING A CALL ON HOLD

1. While you have an active interaction click on the Hold button
2. The caller will be placed on hold and hear hold music

TAKING A CALL OFF HOLD

1. Click on the Accept Interaction button
2. You will be able to resume speaking to the caller

DISCONNECTING A CALL

1. Click the Disconnect button and the caller will be disconnected

   <Note> if you are managing multiple calls then highlight the call you wish to disconnect first

WRAPPING UP A CALL

Wrap up time is time that may be allocated after a call has finished to allow you to complete additional work in relation to that call, before the next call is offered.

During wrap up the system will leave you in a Busy status until the wrap up timer has finished. Your status will then be set back to Available to take further calls. To finish wrap up early click on the End Wrap button

   <Note> the disconnect button changes wrap up when in wrap up time

WRAP UP CODES

Wrap up codes record the result of a particular call. They are also known as Disposition, or Outcome Codes

1. A pop up box will appear on call disconnect.
2. Select the relevant code and click OK