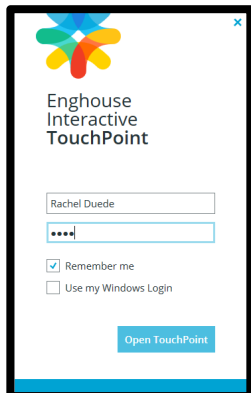


# USER GUIDE – TOUCHPOINT AGENT

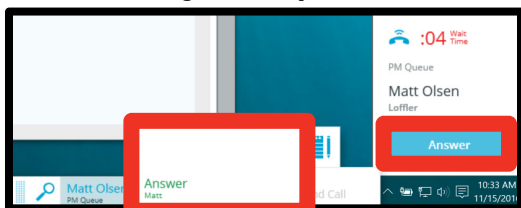
## Signing in

- Open the TouchPoint App
- Enter your User ID – Start Typing your name and it will auto populate
- Enter your Password (2222)
- Check the box that says “Remember Me”
- Click Open TouchPoint



## Answering a Call

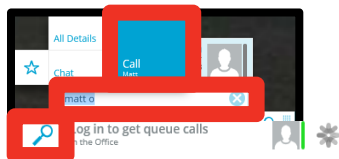
- Click Log in to call queues
- Click Log in to call queues



- Press Answer in the pop up or hover on the name in the call box and select answer

## Placing calls

- Click on the search icon
- Type in a name or phone number
- Press enter to call an external number or select call for an internal number



## Placing a Call on Hold

- While on a call, hover over the green phone icon, press Hold



## Retrieving a Held Call

- Hover over the Orange pause button

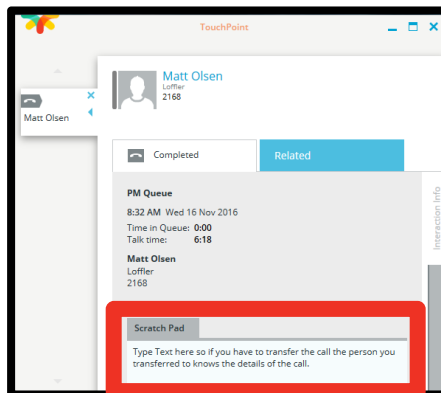


- Click Talk to

## Call Info Window/Scratch Pad

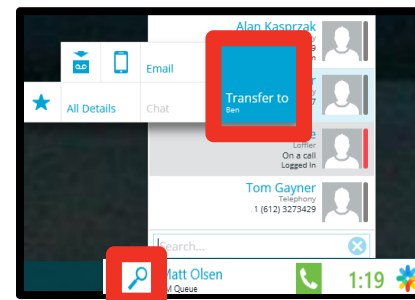
When you take a phone call the Call Info Tab automatically displays, it will present the following information if it is available: Calling Line ID; notes entered about that contact into Phonebook (including their email address), and their caller history.

At the bottom of this tab is a section called the Scratch Pad that you can use to take Notes about that call. This information saves with the call in the history. It also transfers with the call if you send it to another agent

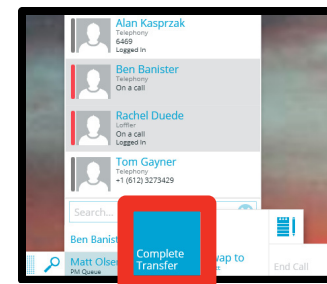


## Transferring a Call

- Click on the search bar
- Type the contact you would like to transfer to, Hover over the name
- Select Transfer

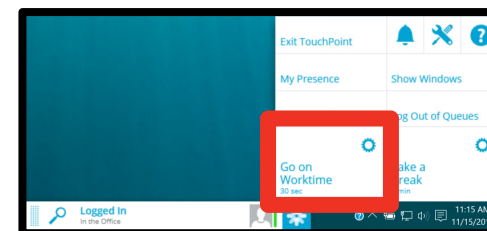


- Hover over the original caller's name
- Complete Transfer (if you hang up it won't complete the transfer)



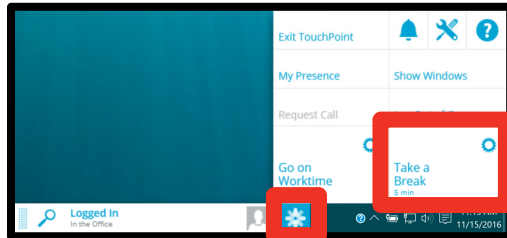
## Work Time

- Used when you need to preform Non-Queue related work tasks. Prevents the queue calls from being delivered to you while you are working on other projects.



## Break Time

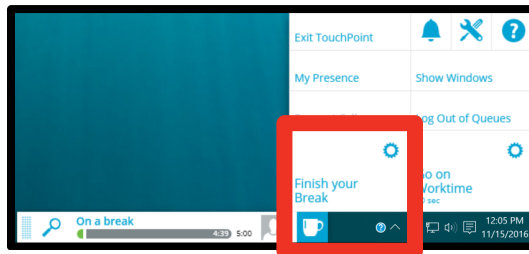
- Click on the Touchpoint Icon
- Click take a break



- Select the type of break
- Click Start Break

## Returning from Break

- Click on the coffee cup



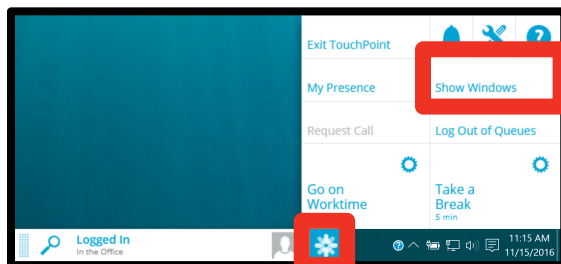
- Click Finish your break

## Parking Calls

- Don't use park while logged in as an agent

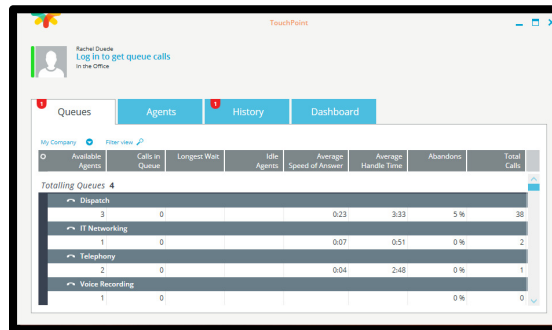
## Checking Statistics

- Click on the TouchPoint Icon
- Click Show Windows



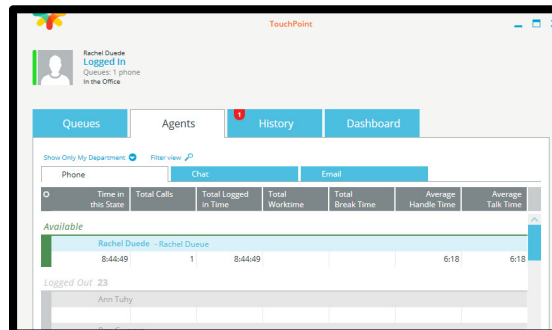
## Queues View

Grouped based on how you take calls from them



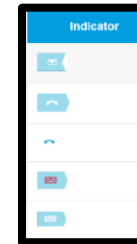
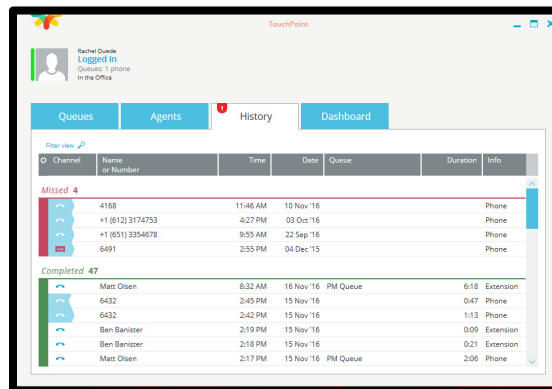
## Agents View

Shows who is logged in, on a break, in worktime, on a call, etc. Also displays which class agents are logged in to



## History View

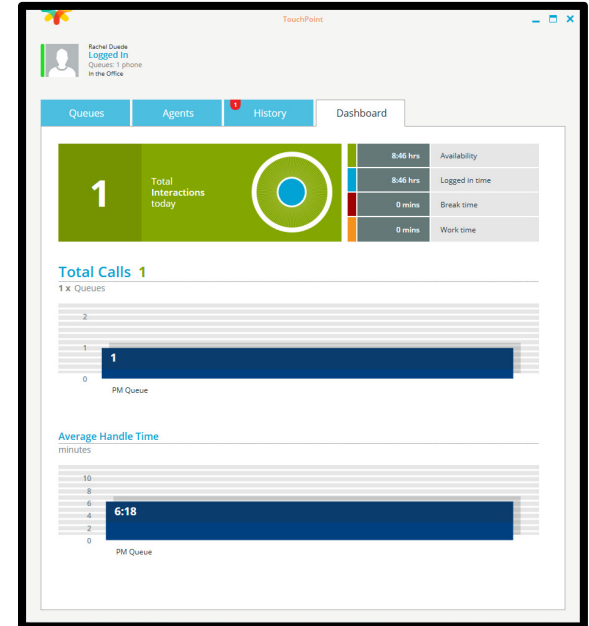
Displays past calls and pending wrap-ups



- Direct Outbound Interaction
- Direct Inbound Interaction
- Queue Interaction
- Un-played Message
- Played Message

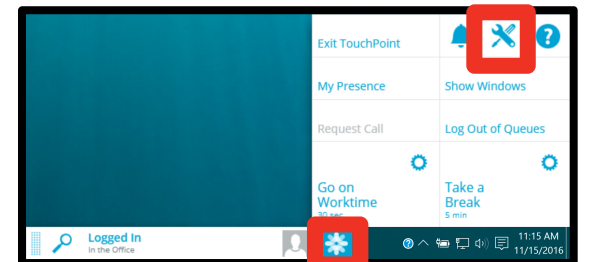
## Dashboard View

Displays statistics related to agent productivity. Shows information on break time, worktime, total calls, active calls and average call handle times



## Preferences

- Click on your TouchPoint Icon
- Click on the Screwdriver and Wrench



- Customize Preferences

## Call Backs

Allows callers to leave their phone number and a short message, then hang up. The call retains its place in queue, and is delivered to an agent when it gets to the front of the line.

Answer a Callback

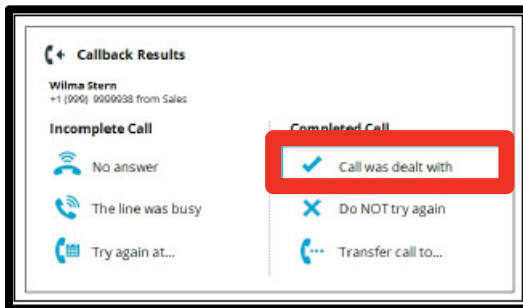
Answer a callback just like a regular queue call. If the caller left a message, it will play automatically.



You can replay the message or call the person back. After you make the phone call you need to resolve the callback.

Resolve a Callback

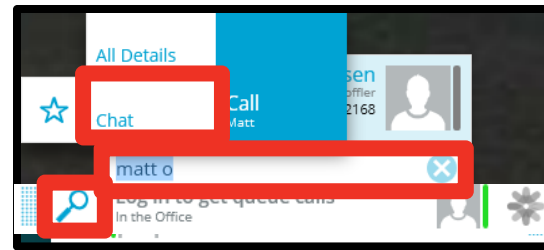
- Click Resolve Callback from the Call Control Widget



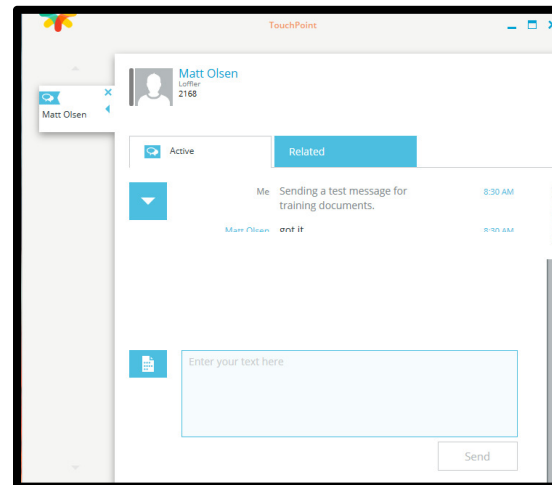
- Successful in contacting the caller choose Call was dealt with and the callback will be marked as complete
- No answer or The line was busy the system will place the call back in queue for a pre-determined amount of time and then deliver that call again to an agent once that time is up.
- Try again at... allows the agent to choose a date/time to attempt to call the person back
- Do NOT try again is usually used after making a number of attempts to call the person back and the business decides to forego any more attempts

## Internal Chat

- Click on the search icon
- Type in the name of the contact you want to chat with
- Hover over the contact and select chat



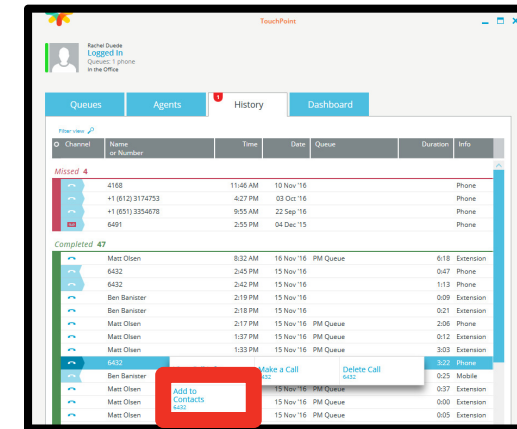
- Type a message
- Click Send



These chats will be save in the history.

## Adding Contacts

- Hover over a call in the history and select add to contacts



- Choose the type of contact
- Type in the first and last name, company, and department
- Click Add Contact

## Training Links:

<http://www.loffler.com/support/training/voice-solution-training/nec-telephony-phone-systems/>

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