Mitel

Powering connections

Interaction Center
User Guide

Table of Contents

Overview

The Interaction Center provides agents with an easy-to-use interface to respond quickly to voice, chat, and email interactions. It also offers supervisory coaching functions, such as silent monitoring, silent coaching, and barge-in for voice and chat interactions.

Tip

Icons are shown in black when the function they represent is available, and they are shown in green or red when the function is currently active.

Tip

All features and permissions that are configured on an account-by-account basis are configured as follows, depending on your platform: If you are an Mitel MiVoice Connect customer, configurations are handled by your administrator. If you are a Mitel MiCloud customer, configurations are handled by Mitel.

Figure 1: Interaction Center User Interface

Log In to Interaction Center

Complete the following steps to log in to Interaction Center:

1. Browse to the Interaction Center page as follows:

    ■ MiVoice Connect — Open a browser and browse to http://*<contact center server IP address>*:3000/ecc.

        The URL you use to access the Interaction Center can vary based upon your configuration. Refer to Table 1 for more information.

Table 1: Interaction Center URLs

Setup	URL
Mitel MiVoice Connect Contact Center without Redundancy	http://*<contact center server IP address>*:3000/ecc
Mitel MiVoice Connect Contact Center with Redundancy	http://*<HQ server IP address>*:8080/ecc
Mitel MiVoice Connect Contact Center with Edge Gateway Redundancy	https://*<Contact Center FQDN defined in the Edge Gateway>/*ecc **Note**: Contact your system administrator for more information about this URL.

    ■ MiCloud — Open a browser and browse to https://ccdirector.shoretel.com/ccd.

2. Enter the **Username** and **Password**. If you are an MiVoice Connect customer, these credentials are provided by your administrator. If you are a MiCloud customer, these credentials are provided by Mitel.

3. Click the arrow or press the `Enter` key.

4. If your account is configured for hot desking, you will be prompted to enter your extension.

Log In to and Log Out of Queues

To log in to queues, click [icon] **Log into my queues** to log in to all of the queues configured for you.

If your permissions are configured to allow you to log out of or in to specific queues and groups, click the downward-facing arrow in [icon] **Log into my queues**, mouse over a queue, and then click **Log Out** or **Log In**. You can search for or refine the list of queue names by typing all or part of the name in the text search field at the top of the pop up.

To log out of queues, click [icon] **Log out of my queues**.

Start and Stop Taking Requests

To exit release mode and resume accepting interactions, click [icon] **Start taking requests**.

To enter release mode and stop accepting interactions, click the [icon] **Stop taking requests** drop down and select the appropriate reason code. You also can enter release mode without specifying a reason code. You can select a release code to prevent accpting interactions even when you are logged in. Also, you can change release codes without resuming.

Accept Interactions

You can view all incoming and current interactions in the left pane, and you can view call profile information for the incoming interactions as follows:

- If you are not already on an interaction, the center pane displays call profile information for the incoming interaction.
- If you are already on an interaction and are now being presented with an additional interaction, you can click anywhere in the black box surrounding the green icon to view the call profile information for the incoming interaction without actively accepting the interaction.

To accept any interaction regardless if it is a new interaction or an additional interaction offered while you are already on another interaction, click the green **Accept** icon. Refer to Table 2 for information about the icons in Interaction Center.

> **Tip**
> - You accept email interactions in the Interaction Center. Once an email interaction is accepted, it is handled in your client application. Emails do not appear in the Interaction Center.
>
> - You must not alter the subject line while handling emails in the client application because this might impact the email handling.
>
> - Email attachments larger than 10 MB may delay email delivery by a few seconds.

When you accept an interaction, information about it appears in the center pane and also in the right pane if the interaction is a chat interaction.

- Center Pane — All interactions display interaction information, which is also referred to as call profile information, in the center pane. The call profile information is pre-defined by the administrator.

- Right Pane — Chat interactions display the chat conversation in the right pane including the free-form text field at the bottom of the right pane.

    Use the free-form text field to type the message you want to convey, and then press the `Enter` key. You also can use the 🖵 **Template Text** icon, which appears in the lower, right corner of the free-form text field, to select pre-defined messages to send in the chat interaction. When you select a pre-defined message, it is added to the free-form text field where you can modify it as needed, such as to add the customer name, and then press the `Enter` key to send it.

    If your account is configured to use wrap-up, when a voice interaction or chat is ended by you or the caller, wrap-up mode is entered. When you respond to an incoming email interaction by sending an email response from your email client, the email call is ended in the Interaction Center, and wrap-up mode is entered.

    Refer to Enter Wrap-Up on page 6 for information about wrap-up mode.

Handle Multiple Interactions

If your account is configured to handle multiple interactions, the left pane of the Interaction Center shows multiple interactions when they are incoming and when they are in process. You can navigate ongoing interactions by selecting them in the left pane. Chats messages that have not been answered will show a message-waiting indicator.

Transfer Interactions

To transfer a call, email or chat, after accepting the interaction, click the ⁺👤 **Transfer** icon. If your account is configured to allow you to transfer interactions to logged in agents, you can enter an agent name to transfer the interaction to. Otherwise, enter the extension to transfer the interaction to someone other than a logged-in agent.You also can enter a full DID to transfer a call to an external number.

When you click **Blind**, the interaction is transferred immediately.

When you click **Consult**, the system contacts the extension or agent you want to transfer to, allowing you to discuss the transfer with the answering party. Click **Complete Transfer**. Click **Cancel** to disconnect the agent you were transferring the interaction to.

> **Tips**
> - **Consult** does not apply to email interactions.
> - Email and chat interactions can be transferred only to logged-in members of the same group that the transferring agent belongs to.

Transfer a Call to an Agent Queue

If your account is configured to include a personal queue, you can transfer a call to your personal queue using the ⟨ᴄ·ᴇ **Transfer to My Queue** icon.

Conference a Call

To conference a call, click the ⁺△ **Conference** icon. Select a logged-in agent, enter an internal extension, or enter a full DID to add to the conference.

When you click **Consult**, the conference is announced to the agent/extension/phone number you want to conference in.

Enter Wrap-Up

When a voice, chat, or email interaction ends, Interaction Center may display Wrap Up information in the right pane if your account is configured to use wrap-up.

The timer in the center of the Wrap Up information shows a count-down to the end of wrap-up mode. You can click **Extend** to allow for more time to complete wrap up. When you click **Extend**, you remain in wrap-up mode until you click **End Wrap Up**.

Wrap-Up Codes

To associate one or more wrap-up codes with the interaction, enter the wrap up code name or number in the search field, and then click **End Wrap Up**.

Wrap-up mode applies to voice, chat, and email interactions.

> **Tip**
> There may be instances where wrap-up codes appear to be missing from reports. This situation is likely caused by an agent logging out of the primary group or the group that routed the call or by the agent closing the Interaction Center.

Enter Wrap-Up Code(s) During an Active Interaction

To enter wrap-up code(s) during an active interaction, click the **Wrap-Up Code** icon in the right pane, and then select relevant wrap-up codes. Entering wrap-up codes during an active interaction does not impact the interaction.

Request Help

You can request help from a supervisor by clicking the **Request Help** icon. Once you click this icon, the supervisor is alerted and can join your interactions to assist.

Monitor Queues

You can monitor your personal queues or pick up an interaction in queue if your account is configured for this ability. You monitor queues by clicking the **Queues** item in the left pane. In the resulting view, you can sort, select, and pick up interactions if permissions allow.

- **Display** — You can display interactions for particular queues by clicking the drop-down arrow in **Show**.

- **Sort** — You can sort call data by selecting a particular call profile field in **Sort By**.

- **Pick Up** — You can click the **Accept Call** icon to manually pick up interactions. This capability is permission based.

View Agents

Supervisor permissions allow supervisors to view information about agents assigned to the queue(s) that the supervisor manages. If you are a supervisor with these permissions, you can view this information by clicking the **Agents** item in the left pane. When the agents view displays, you can sort agents by typing all or part of an agent name, agent extension, or queue name in the search bar. Also, you can click **All** to view all agents logged in or click **Help Request** to display agents that have asked for help.

View Queues

You can view information about queues, such as Caller ID, Caller Name, and Queue. Your account configuration determines the information displayed in the queue.

Complete the following steps to view activity in all or selected queues:

1. In Agent Web Interface, click the **Queues** item in the left pane.

2. Click the **Show** drop down to select which queue you want to display information for. You also can select **All** to display information for all queues.

3. Once you have selected which queues to display information for, select the call profile field by which you want to sort the queue data in the **Sort By** drop-down.

View Key Performance Indicators (KPIs)

You can view Key Performance Indicators (KPIs) in the KPI board, which is located at the bottom of the Interaction Center. The KPI board details are configured Class of Service (COS) and can include information such as calls in queue, the number of agents logged in, and the number of agents in release mode. You can use this information to determine if it is an appropriate time to go into release mode or to finish wrap-up mode more quickly.

Join Agent's Interaction

If you are a supervisor, you can join agent's voice and chat interactions in the following three ways:

	Silent Monitor — Use this feature to silently monitor the agent's interaction. The agent will know that you are observing the interaction, but you will not be able to interact with the agent or the other participant in the interaction.
	Barge — Use this feature to actively participate in the interaction. The agent and the other participant will both be able to see or hear your participation in the interaction. **Note**: This icon appears only after the supervisor has initiated Silent Monitor.
	Silent Coach — Use this feature to silently coach the agent. The other interaction participant will not hear or see your interaction with the agent. **Note**: This icon appears only after the supervisor has initiated Silent Monitor.

Complete the following steps to join an agent's interaction:

1. Select the interaction in the left pane.

2. Click the appropriate icon depending on the level at which you want to participate in the interaction.

3. To exit the agent's interaction, click the appropriate icon again. For example, if you are in the process of silently monitoring the agent's voice interaction, click the 🎧 **Silent Monitor** icon to exit the interaction.

Callbacks

The Interaction Center callback options, which appear as selections when an outbound call is ended, are as follows:

- **Call back - busy**
- **Call back – no answer**
- **Do not call back**

The **Call back - busy** and **Call back - no answer** options reinsert the number back into the list. These numbers are called back at a later time based on dial list preferences configured for your account.

The **Do not call back** option removes the number from the dial list.

Modifying and Reviewing Settings

To modify and review settings, click the drop-down arrow beside your name in the top, right corner of the screen and select **Settings** to modify and review the following information:

- **Sound Notifications** — Enable or disable various sound notifications.This field is available only if sound notifications are enabled for your account.

- **Desktop Notifications** — Enable or disable various desktop notifications.

> **Note**
>
> The Desktop Notifications feature is unavailable for Internet Explorer and Microsoft Edge.

- **Logged into queues** — Review the queues you are currently logged into. If the list of queues you are currently logged into is longer than the display area, hover your cursor over the Logged into queues list and use the scrollbar that appears to navigate the list.

Icon Dictionary

The following table includes definitions for each of the icons available in the Interaction Center.

Tip

Icons are shown in black when the function they represent is available, and they are shown in green or red when the function is currently active.

Table 2: Interaction Center Icon Dictionary

Icon	Description
	Conference in another participant
	Barge in on an interaction
	Indicates a voice interaction.
	Indicates a chat interaction.
	Indicates an email interaction.
	Indicates that an interaction is part of a conference.
	Indicates an interaction is on hold.
	Indicates a voice interaction is in progress.
	Accepts a voice call.
	Accepts a chat interaction.
	Accepts an email interaction.
	Indicates that a call is a conference call.
	Completes the addition of another participant to form a conference.
	Ends a voice interaction or allows you to reject an outbound voice callback if your account has been configured for enabled confirmation for abandoned callbacks.

Table 2: Interaction Center Icon Dictionary (Continued)

Icon	Description
	Ends a chat interaction.
	Ends an email interaction.
	Logs the agent in to all queues s/he is assigned to.
	Logs the agent out of all queues s/he is assigned to.
	Alerts the supervisor that an agent has requested help.
	Puts the agent in release mode.
	Resumes the agent.
	Displays a list of template chat responses that the agent can select from.
	Displays options to create a conference call.
	Sends an interaction to an agent's personal queue.
	Completes the process of transferring a call.
	Allows a supervisor to talk or chat with agent without the calling party hearing or seeing the conversation.
	Allows the agent to select a wrap-up code.