

# Voca Conversational Interaction Center

## *Worker & Supervisor Application*



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## Table of Contents

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<b>Notice.....</b>	<b>iv</b>
Customer Support.....	iv
Stay in the Loop with AudioCodes.....	iv
Abbreviations and Terminology .....	iv
Document Revision Record .....	iv
Documentation Feedback.....	iv
<b>1 Introduction.....</b>	<b>1</b>
<b>2 Logging into Voca CIC Worker Application .....</b>	<b>2</b>
<b>3 Main Window .....</b>	<b>4</b>
3.1 Shift Status Bar .....	5
3.1.1 Changing Shift Status per Channel .....	5
3.1.2 Viewing Shift Status Duration per Channel .....	6
3.2 Opting In or Out of Call Queues .....	6
3.3 Making Outbound Calls .....	7
3.3.1 Dialing a Number using Phone Keypad .....	7
3.3.2 Calling a Contact from Phonebook.....	8
<b>4 Voice Channel Interactions.....</b>	<b>9</b>
4.1 Answering or Rejecting a Call.....	9
4.2 Call Operations .....	10
<b>5 Email Channel Interactions.....</b>	<b>11</b>
5.1 Viewing Emails.....	11
5.2 Stopping New Interactions.....	11
5.3 Accepting or Declining an Email.....	12
5.4 Viewing an Email .....	12
5.5 Replying to an Email .....	13
5.6 Assigning an Email to Different Queue .....	14
5.7 Forwarding an Email.....	14
5.8 Requesting Assistance for Email Reply.....	14
5.9 Wrapping Up an Email Interaction .....	15
5.10 Supervisor View.....	16
<b>6 Webchat Channel Interactions.....</b>	<b>17</b>
6.1 Viewing Webchats.....	17
6.2 Accepting or Declining a Webchat .....	17
6.3 Responding to a Chat Message .....	18
6.4 Stopping New Interactions.....	19
6.5 Assigning a Webchat to Different Queue.....	19

6.6	Attaching a File to a Webchat .....	20
6.7	Ending and Wrapping Up a Webchat Interaction .....	21
6.8	Supervisor View .....	22
<b>7</b>	<b>Queue Statistics .....</b>	<b>23</b>
7.1	Viewing Worker's Queue Statistics .....	23
7.2	Viewing Queue Statistics (Supervisor Only) .....	24
<b>8</b>	<b>Viewing Missed Call Queues .....</b>	<b>26</b>
<b>9</b>	<b>Team Management (for Supervisors) .....</b>	<b>27</b>
9.1	Live Monitoring of Workers .....	27
9.2	Signing Out Workers.....	28
9.3	Managing Queues .....	28
<b>10</b>	<b>Logging Out of Worker Application .....</b>	<b>29</b>

## Notice

Information contained in this document is believed to be accurate and reliable at the time of printing. However, due to ongoing product improvements and revisions, AudioCodes cannot guarantee accuracy of printed material after the Date Published nor can it accept responsibility for errors or omissions. Updates to this document can be downloaded from <https://www.audiocodes.com/library/technical-documents>.

This document is subject to change without notice.

Date Published: May-07-2024

## Customer Support

Customer technical support and services are provided by AudioCodes or by an authorized AudioCodes Service Partner. For more information on how to buy technical support for AudioCodes products and for contact information, please visit our website at

<https://www.audiocodes.com/services-support/maintenance-and-support>.

## Stay in the Loop with AudioCodes



## Abbreviations and Terminology

Each abbreviation, unless widely used, is spelled out in full when first used.

## Document Revision Record

LTRT	Description
26653	Initial document release.

## Documentation Feedback

AudioCodes continually strives to produce high quality documentation. If you have any comments (suggestions or errors) regarding this document, please fill out the Documentation Feedback form on our website at <https://online.audiocodes.com/documentation-feedback>.

# 1 Introduction

Welcome to AudioCodes Voca Conversational Interaction Center (CIC) Worker and Supervisor! This document provides step-by-step instructions on how to use the Voca CIC Worker Application.

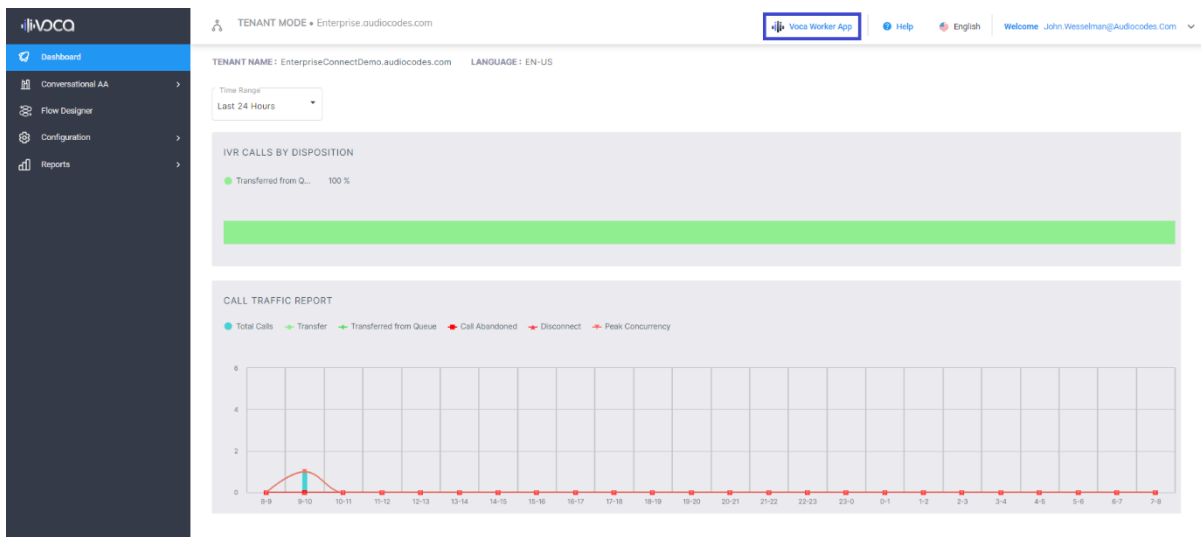
The Voca CIC Worker Application is a web-based application for Workers (Agents) to handle voice and digital interactions and daily tasks tied to their roles, in one screen. From handling customer interactions to accessing real-time customer information and contact center statistics, each step in this document powers Workers to masterfully use Voca CIC in minutes. Let's jump in and show you the full potential of your new Worker and Supervisor experience!

## 2 Logging into Voca CIC Worker Application

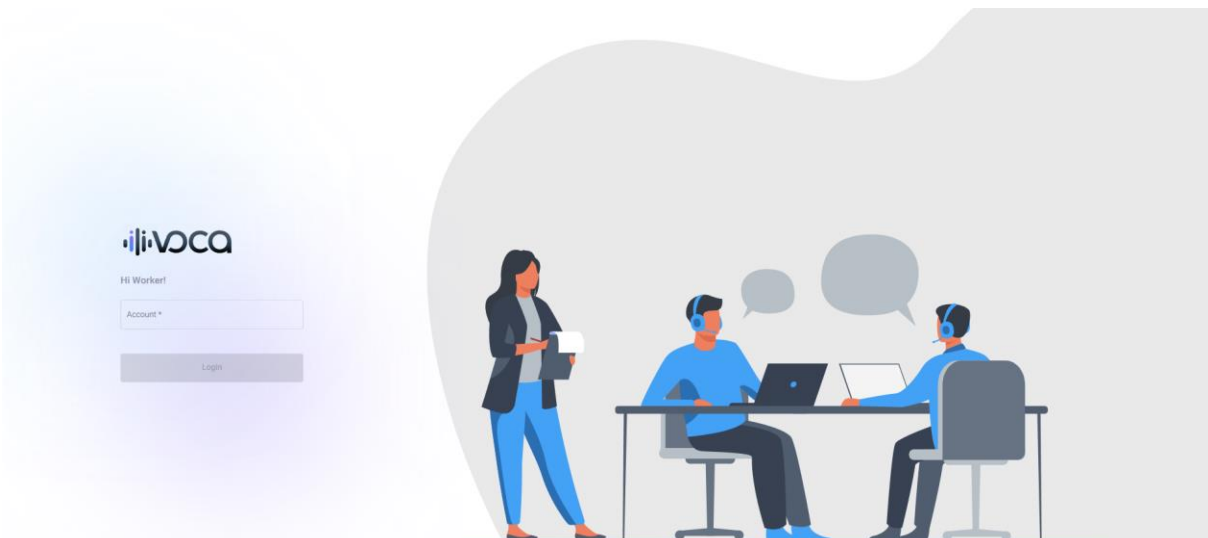
Follow the steps listed out here to log in and use the Voca CIC Worker Application.

To log in to Worker application:

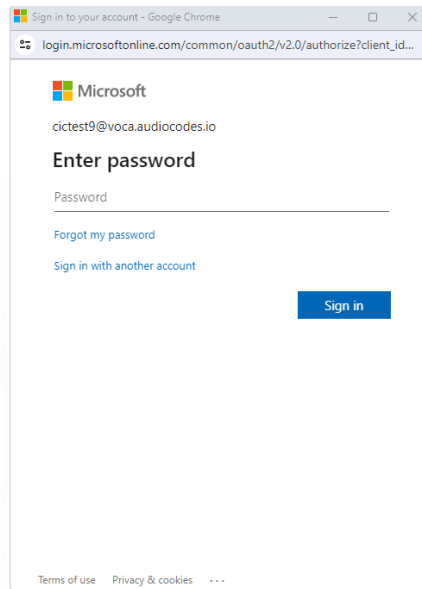
1. From the Navigation menu pane, select **Dashboard**, and then click **Voca Worker App**:



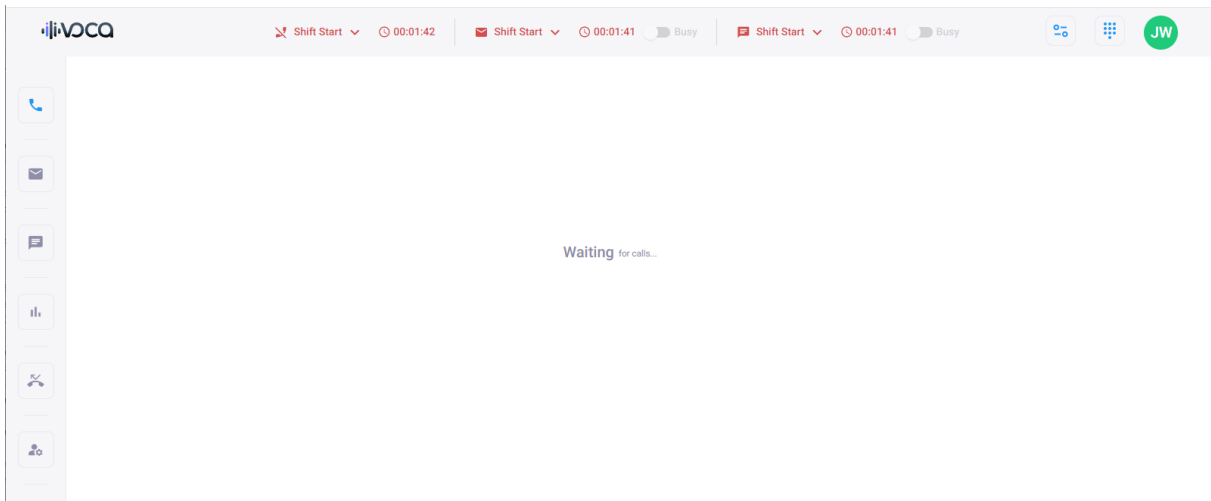
The Worker login page appears:



2. Enter your Worker's email address, as configured in Voca CIC, and then click **Login**; a password window appears:



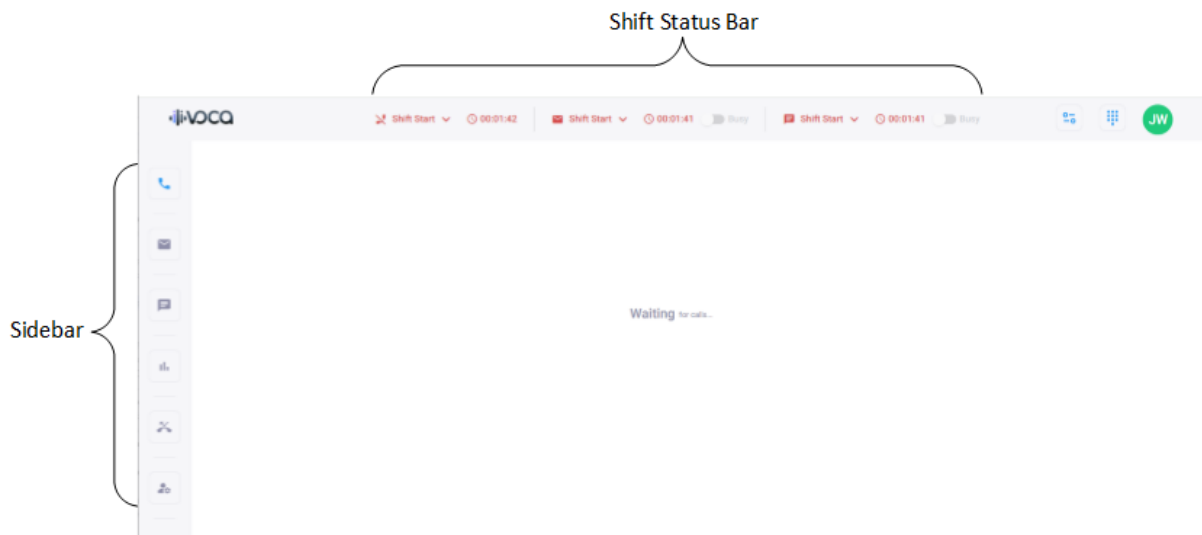
Enter your Worker's Microsoft account password (SSO), and then click **Sign in**; the Worker Application opens, as displayed below!



### 3 Main Window

The main window of the Worker Application displays the following:

- [Shift status bar](#)
- [Opt-in/out of queues](#)
- [Making calls](#)
- Sidebar:
  - [Voice channel](#)
  - [Email channel](#)
  - [Webchat channel](#)
  - [Queue Statistics](#)
  - [Missed calls queue](#)
  - [Team management \(for Supervisors\)](#)



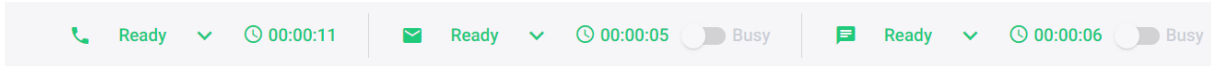


## 3.1 Shift Status Bar

The Shift status bar displays the following per channel (voice, email, and webchat):

- [Your shift status \(availability\)](#)
- [Duration of your current shift status](#)

For example, the status bar below indicates that you are ready (available) to receive incoming interactions for all channels, and displays the duration of this "Ready" status per channel:

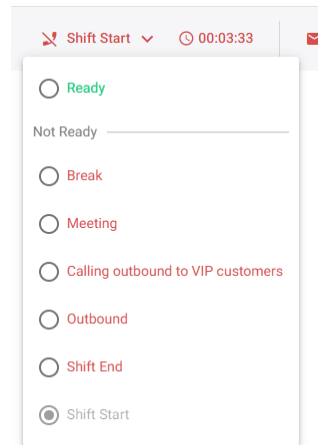


### 3.1.1 Changing Shift Status per Channel

You can change the status of your shift for each channel (email, voice, and webchat).

To change shift status:

1. On the status bar, click the down-facing arrow corresponding to the channel whose shift status you want to change; a drop-down list appears:

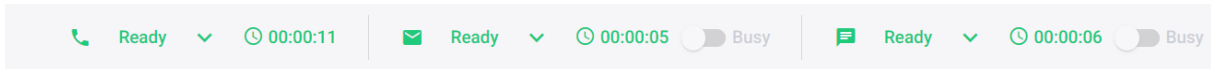


2. Select the required shift status:
  - **Shift Start:** This is the default status when you log into the Worker Application. When in this status, you can't receive incoming calls nor interactions.
  - **Ready:** You're available to receive incoming calls and interactions.
  - **Not Ready:** You're not available to receive calls or interactions and calls will not be sent to you. The statuses representing the reasons for your unavailability can be customized in the Voca CIC Admin interface. For example:
    - ◆ **Break**
    - ◆ **Meeting**
    - ◆ **Calling outbound to VIP customers**
    - ◆ **Outbound**
  - **Shift End:** Your shift has ended, and you won't receive any interactions. Only when the status of all your channels is **Shift End** can you log out of the Worker Application.

### 3.1.2 Viewing Shift Status Duration per Channel

The status bar displays the duration (hours:minutes:seconds) that you have been in the current shift status (e.g., "Ready") per channel.

For example, the status bar below indicates that you have been in "Ready" status for 11 seconds in the email channel:



When you change your shift status, the timer resets to zero.


## 3.2 Opting In or Out of Call Queues

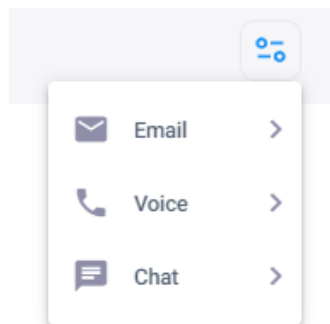
You can opt-in or opt-out of call queues per channel (email, voice, and webchat). When you opt-in a specific queue, you will start receiving interactions from that queue. When you opt-out a queue, you'll no longer receive interactions of that queue.



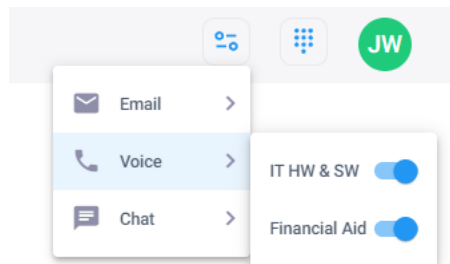
You must be associated with at least one queue per channel.

To opt-in or opt-out of queues:

1. On the toolbar, click the  icon; a drop-down menu appears, listing the different channels:



2. Hover over the relevant channel, and then click the toggle switch button to join or leave the relevant queue:



## 3.3 Making Outbound Calls


You can make outbound calls using one of the following methods:

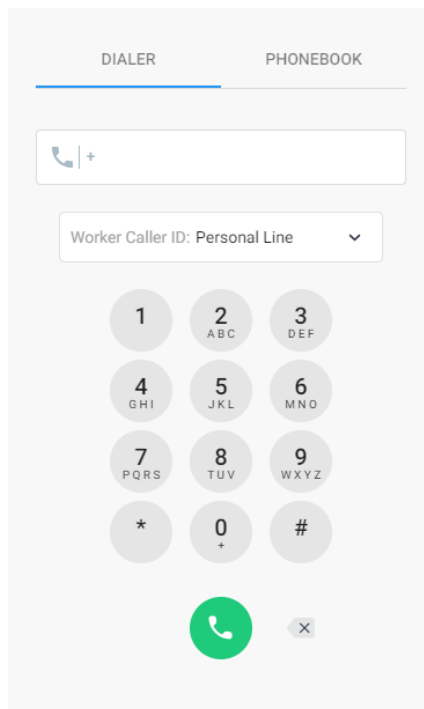
- [Manually dialing the number using the phone keypad](#)
- [Selecting a contact from your organization's phonebook](#)


### 3.3.1 Dialing a Number using Phone Keypad

From the dialer (keypad), you can manually enter the desired number and initiate an outbound call. In addition, you can select which number is presented to the customer as the Caller ID. The available options for the Caller ID include your personal line or any queue number that you are associated with.

To manually dial a number:

1. Click the  icon in the top-right of the window; the following dialog box appears:




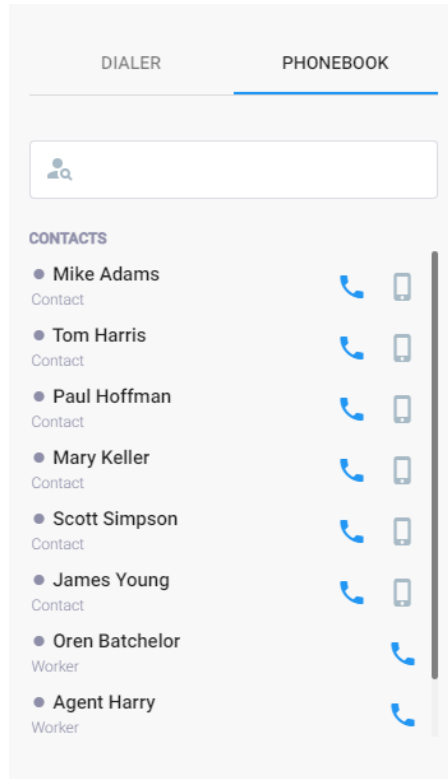
2. Select the **Dialer** tab (default).
3. Using the number keypad, enter the desired phone number.
4. From the 'Worker Caller ID' drop-down list, select one of the following for the caller ID:
  - **Personal Line:** Your personal line is used as the caller ID.
  - An available queue from the list.
5. Click  to dial the call.

### 3.3.2 Calling a Contact from Phonebook

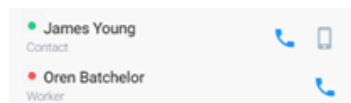
You can use your organization's phonebook to call a customer.

To make a call using phonebook:




1. Click the  icon located in the top-right of the window.
2. Select the **Phonebook** tab; the contact list appears:



Each contact is displayed with its Teams presence status and organizational role ("Contact" or "Worker"), as shown in the following example:



A "Contact" is a Teams user that is defined in the Voca CIC Contacts section in the Admin interface. A "Worker" is a user that is defined in the Voca CIC Worker section in the Admin interface.

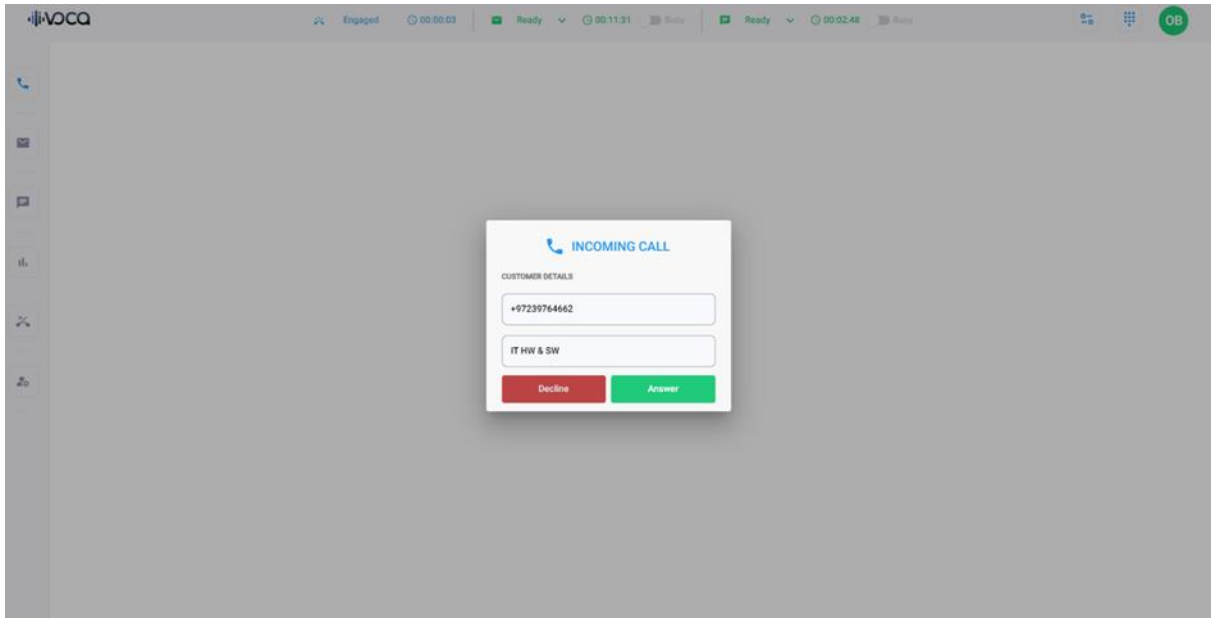
3. In the search  field, type the name of the contact that you want to call.
4. Dial the contact by doing one of the following:
  - Click the  icon to call the contact's **office extension**.
  - Click the  icon to call the contact's **mobile**.

## 4 Voice Channel Interactions

The Voice channel page allows you to interact with voice calls. Both Incoming and outgoing call information appears here.

### 4.1 Answering or Rejecting a Call

When you receive an incoming call, a pop-up notification box appears, as shown below, displaying the caller's phone number and the name of the queue that routed the caller to you. In addition, your shift status of the voice channel on the status bar changes to "Engaged".

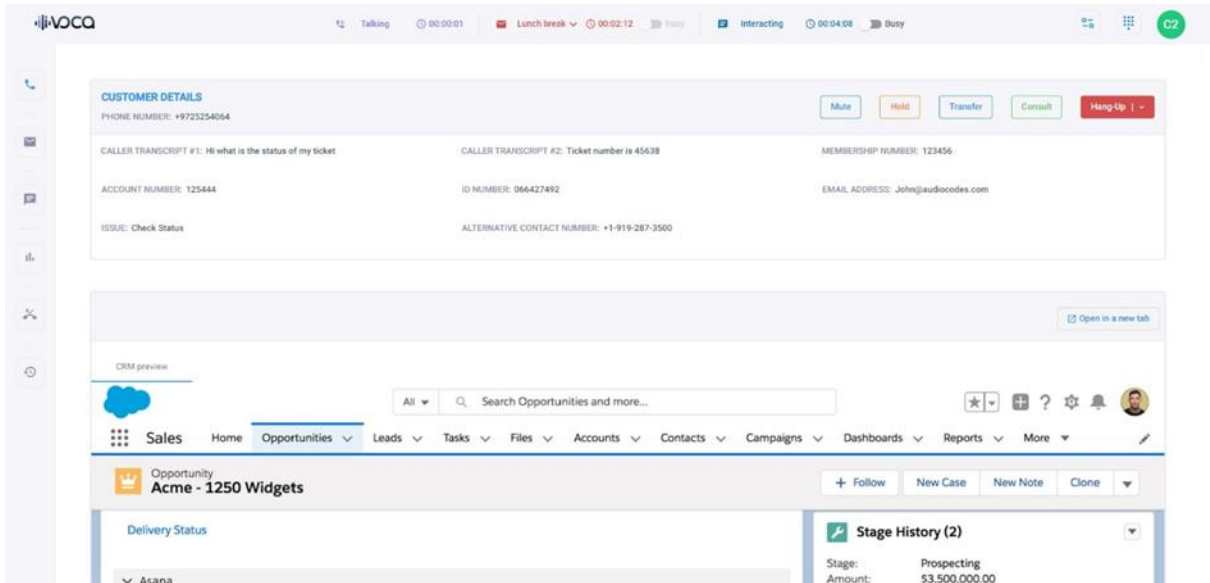


#### To accept or decline a call:

- In the pop-up notification box, do one of the following:
  - Click **Answer** to accept the call.
  - Click **Decline** to reject the call.






When you answer the call, your shift status of the voice channel on the status bar changes to "Talking", and the following is displayed on the page:

- Customer Details pane displays information about the customer (caller):
- (Optional) If the Worker Application is integrated with a CRM, the relevant information about the customer is also displayed, as shown in the following example:



## 4.2 Call Operations

When you answer a call, the Customer Details group provides you with buttons that allow you to perform various call operations, as described in the following table:

Button	Description
	Mutes the call on your side.
	Puts the call on hold.
	Transfers the call to another destination.
	Puts the caller on-hold and connects you with a Supervisor for consultation.
	Ends the call.


## 5 Email Channel Interactions

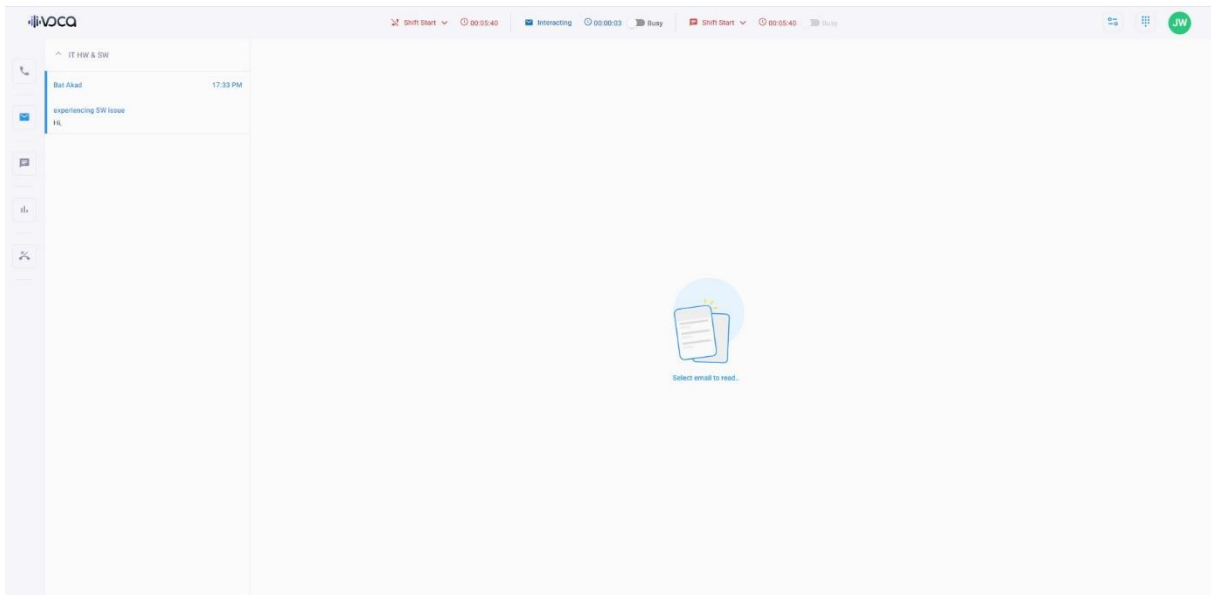
The email channel page allows you to interact with incoming emails. This page displays the emails you have received from the queues to which they are assigned.

### 5.1 Viewing Emails

You can view the emails that are associated with you. These emails are organized under the relevant queues.

**To view emails:**

- On the sidebar, click the email  icon; the email channel page appears, displaying emails, which are listed under the relevant queues:

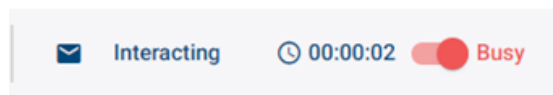


### 5.2 Stopping New Interactions

While you are handling an email interaction, you may choose to stop receiving new interactions (voice, email and chats). This may be useful, for example, if you are dealing with an interaction that requires a lot of time, or if you are planning on taking a break when you finish the current interaction.

**To stop receiving new emails:**

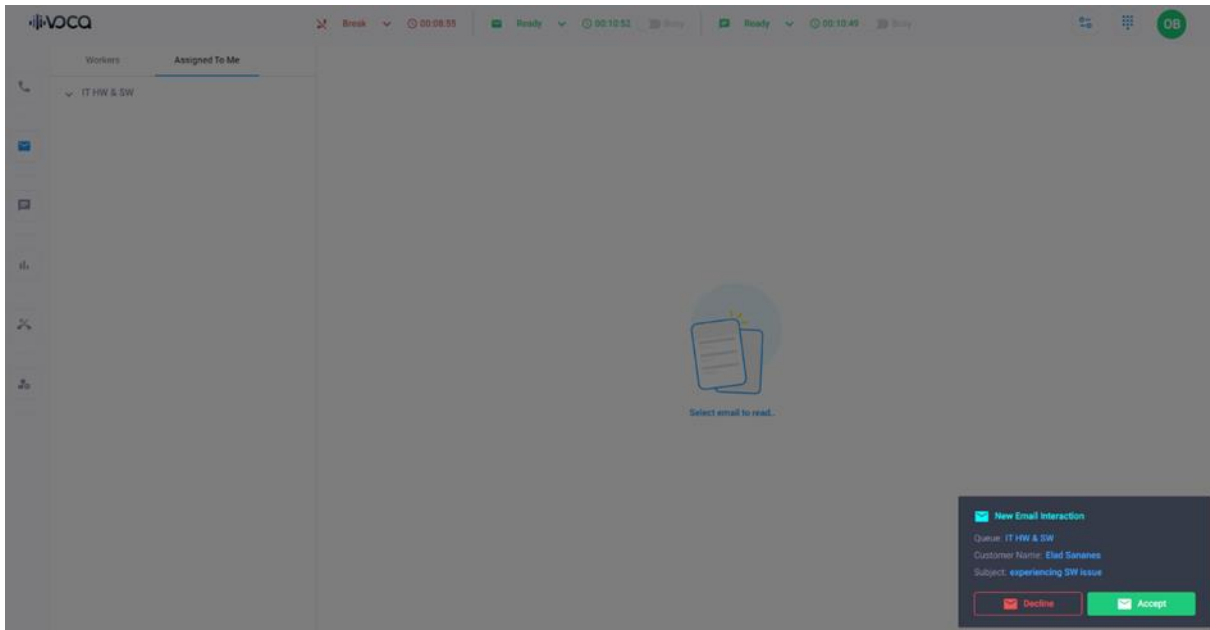
- On the toolbar, click the **Busy** toggle switch button so that "Busy" appears in red, as shown below:



If you want to resume interactions emails, click the toggle switch again.

## 5.3 Accepting or Declining an Email

When you receive an email, a pop-up message appears displaying the queue's name, customer's name, and email subject, as shown in the following example:



To accept or decline an email:

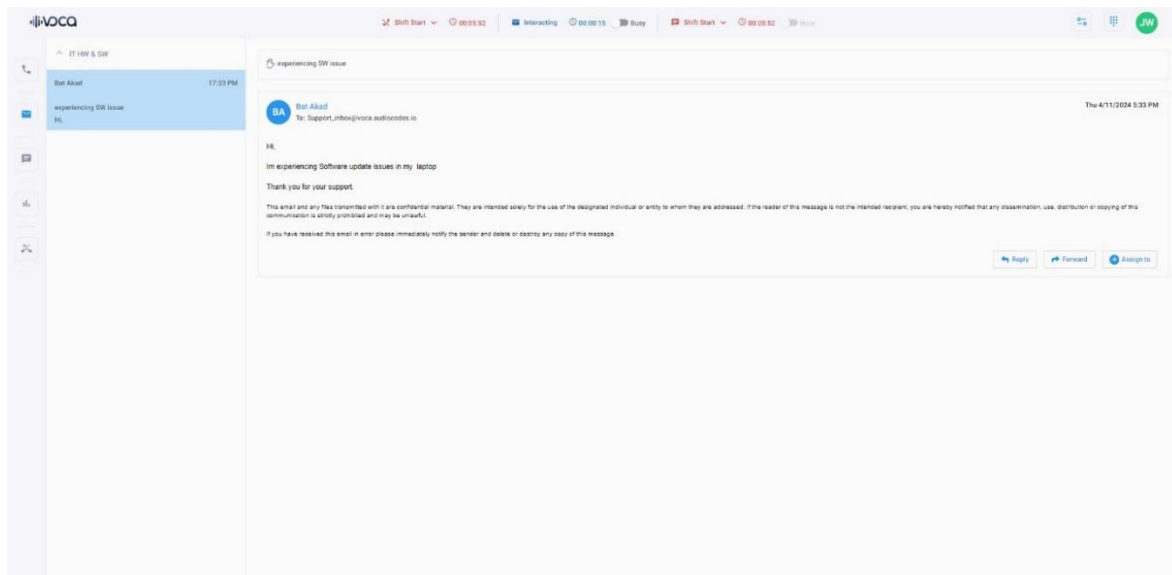
- In the pop-up email notification box, do one of the following:
  - Click **Accept** to accept the email.
  - Click **Decline** to reject the email.

## 5.4 Viewing an Email

When you accept an email, it appears listed in the left pane under the relevant queue.

To view an email's contents:

- In the left pane, click the listed email; its contents are displayed in the right pane:



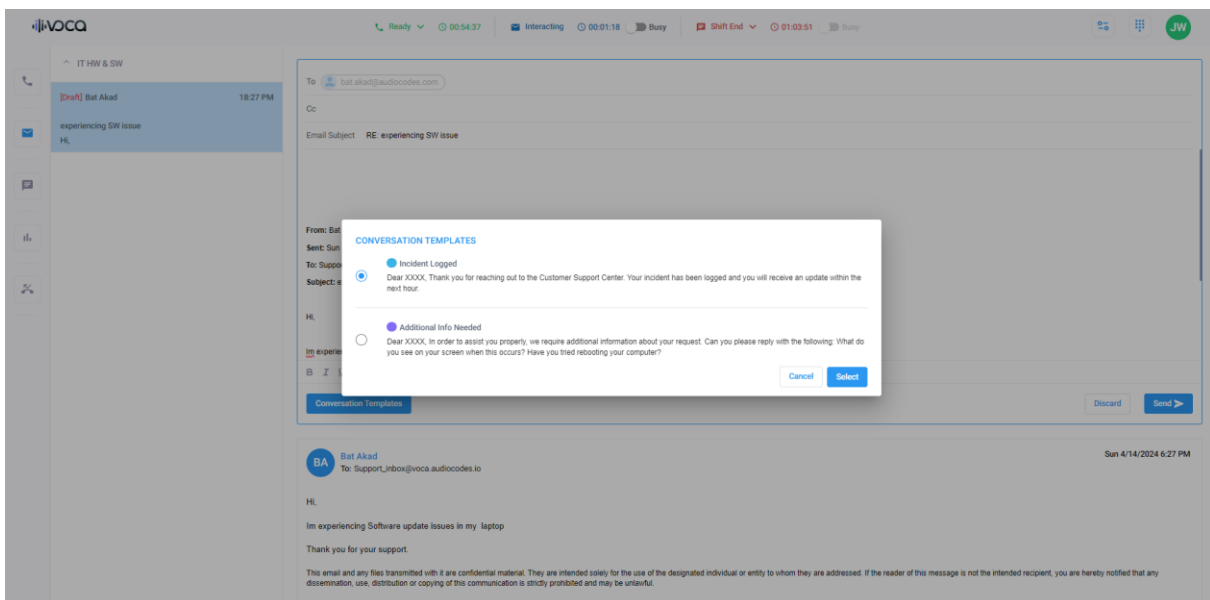


## 5.5 Replying to an Email

When you open an email, you can reply to the customer by typing an answer or by inserting a predefined answer from a template called *Conversation Templates*. If you use a predefined answer, you can also edit it to suit the email's content.

### To reply to an email:

1. Open the email.
2. Typing an answer manual:
  - a. Type an answer.
  - b. Click **Reply**.
3. Using a predefined answer:
  - a. Click the **Conversation Templates** button located below the email; the Conversation Templates dialog box appears:



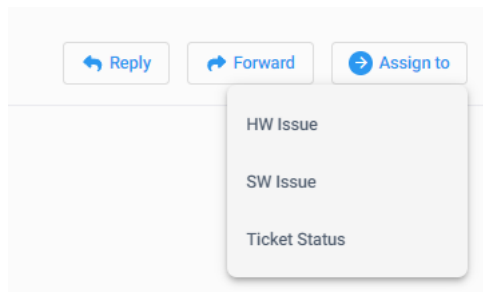
- b. Select the relevant template, and then click **Select**; the predefined answer appears in the email content.
- c. (Optional) Edit the inserted predefined answer.
- a. Click **Send**.

## 5.6 Assigning an Email to Different Queue

You can assign an email to a different queue. This can be useful if, for example, you find the email isn't within your queue's responsibilities, or the customer asks for further assistance regarding a different issue.

To assign email to different queue:

1. Open the email.
2. Click the **Assign to** button, located below the email; a drop-down list appears, listing available different queues, as shown in the following example:



3. Select a queue; the email is assigned to the selected queue and your status reverts to "Ready".

## 5.7 Forwarding an Email

You can forward an email to fellow Workers or a Supervisor.



To forward email:

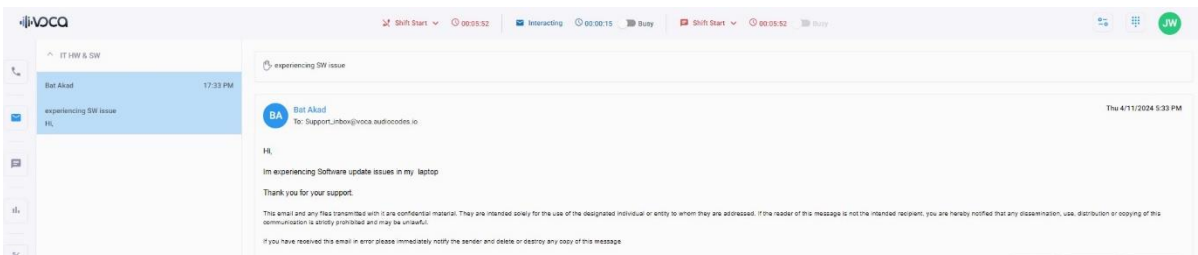
1. Open the email.
2. Click the **Forward** button located below the email.

## 5.8 Requesting Assistance for Email Reply

If you require assistance in responding to an email, you can "raise a hand". Your Supervisor will receive a notification containing the email, allowing the Supervisor to assist you in replying.

To request assistance:

1. Open the email.
2. Click the **Raise Hand**  icon located above the email; the icon changes to red  and the Supervisor receives a request-for-help notification.



3. Once you've received help from your Supervisor, you can send the email.

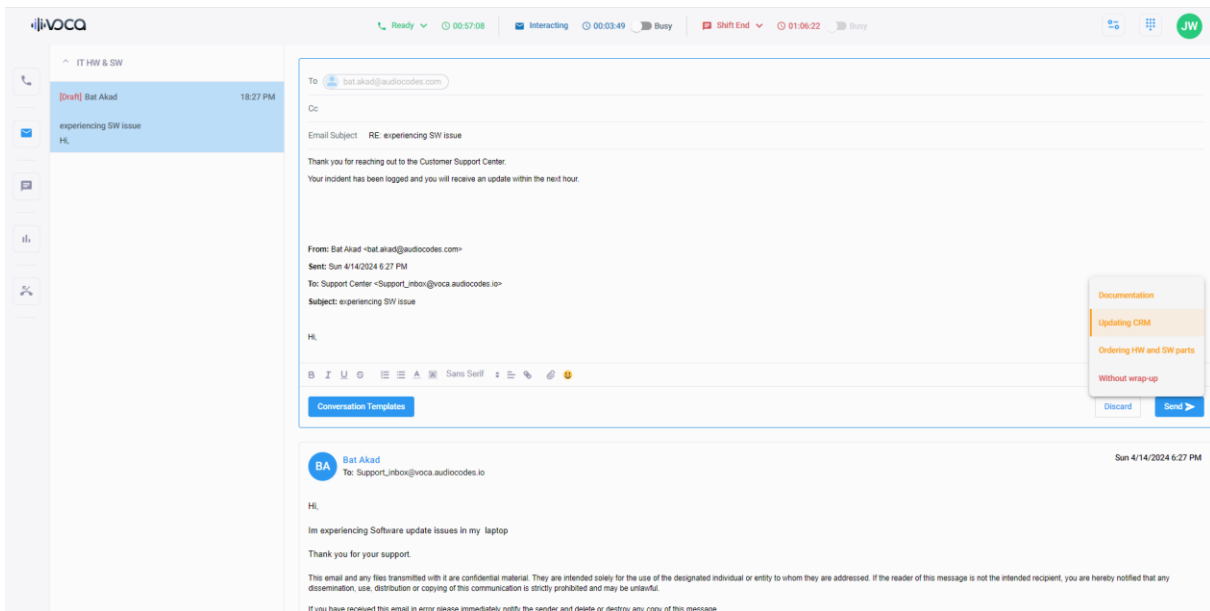
## 5.9 Wrapping Up an Email Interaction

Once you finish an email interaction, you have a predefined time to summarize (*wrap-up*) the interaction. The wrap-up can be used, for example, to update documentation, update your organization's CRM, or any other organizational need.

Alternatively, you can choose not to wrap-up the interaction.

To wrap-up email interaction:

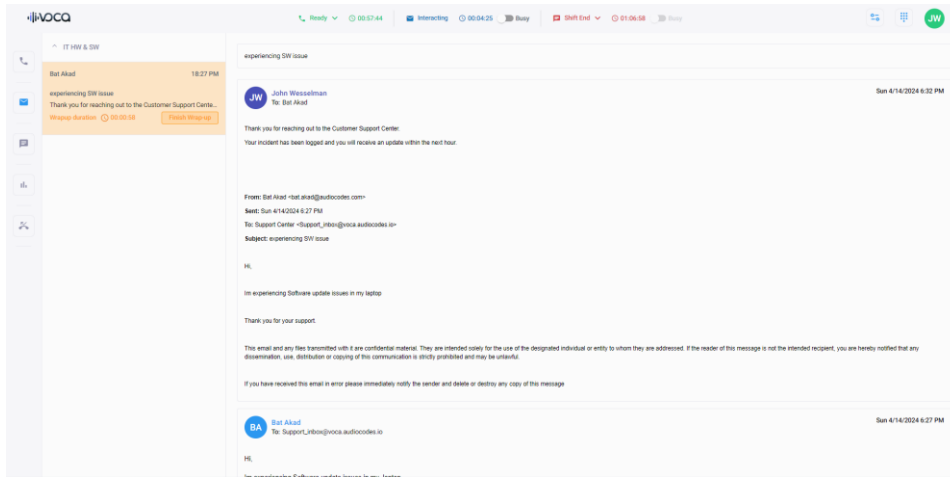
1. Open the email.
2. Perform your interaction as desired.
3. Click the **Send** button; a drop-down menu appears, listing available wrap-up options, as shown in the following example:



4. Select a wrap-up reason; the email is sent. In addition, the left pane displays the listed email highlighted in a background color and a countdown is activated to complete the selected wrap-up. If you finish the wrap-up before the countdown ends, click the **Finish Wrap-up** button. If the counter expires and you haven't clicked the button, the wrap-up ends automatically, and you're reverted to "Ready" mode.



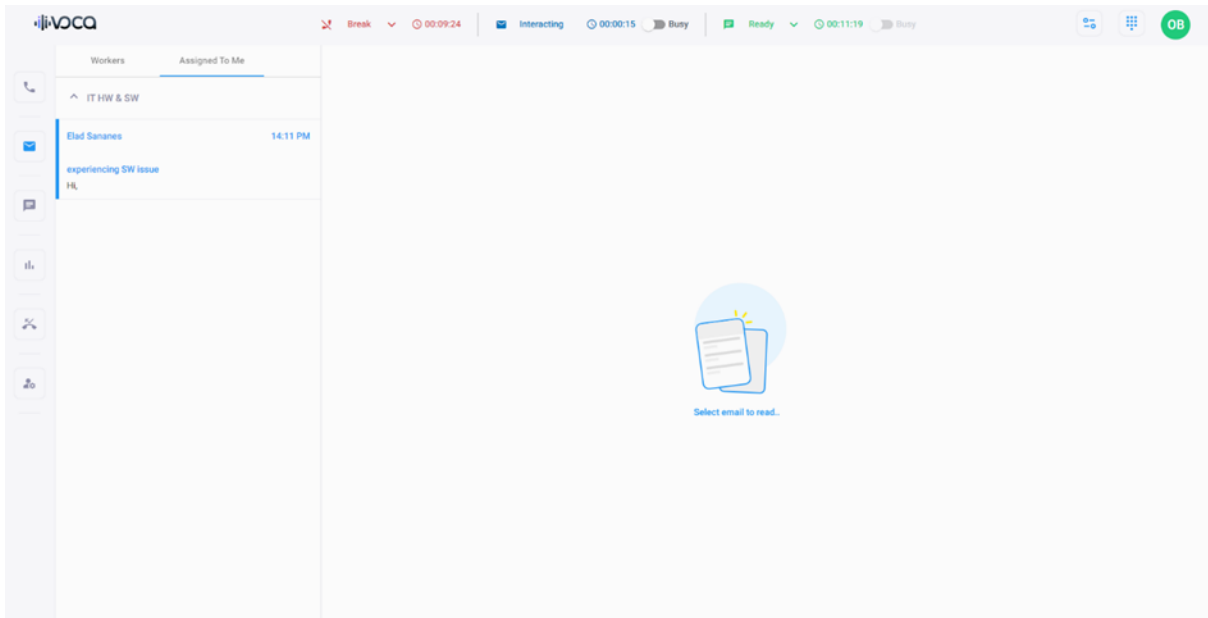
You can choose not to wrap-up the interaction, by selecting **Without wrap-up**. In this scenario, your status immediately changes to "Ready".



### 5.10 Supervisor View

In Supervisor mode, the email channel's left pane provides two tabs:

- **Workers:** Lists all the Workers assigned to the Supervisor and the associated queues.
- **Assigned to me:** Lists all the emails the Supervisor is assigned to handle. The emails in the list are ordered under the name of the associated queues.




## 6 Webchat Channel Interactions

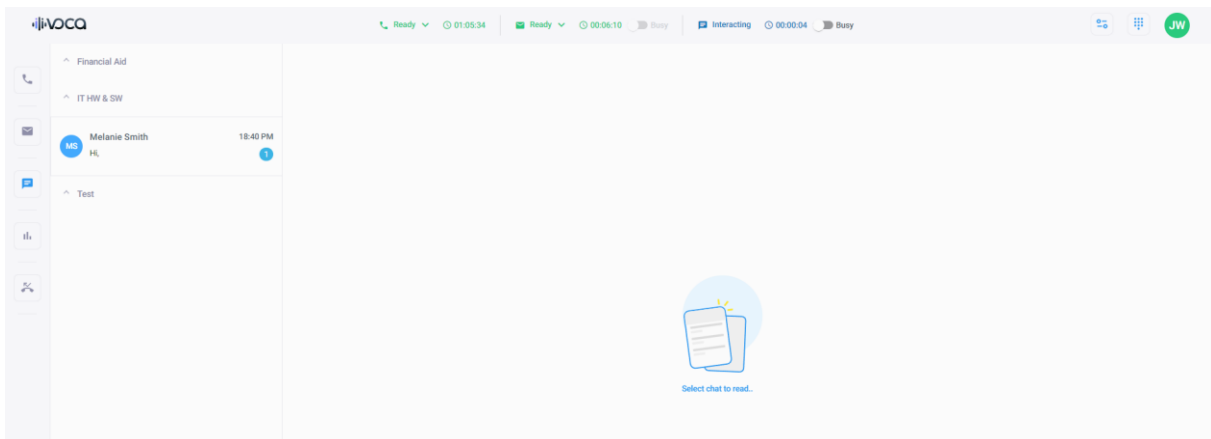
The webchat channel page allows you to receive chats from the queues that you are assigned to.

### 6.1 Viewing Webchats

You can view the webchats that are associated with you. These webchats are organized under the relevant queues.

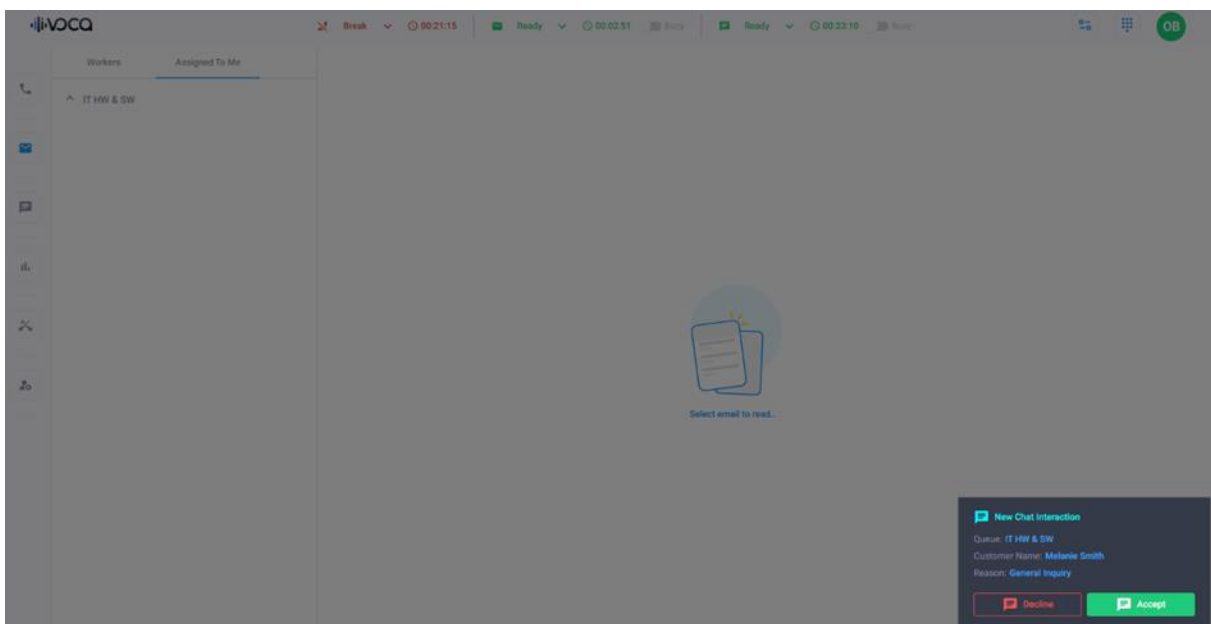
To view webchats:

- On the sidebar, click the **Chats**  icon; the webchat channel page appears, displaying webchats:



### 6.2 Accepting or Declining a Webchat

When you receive a new webchat, a pop-up message appears displaying the queue's name, customer's name, and reason, as shown in the following example:



#### To accept or decline an email:

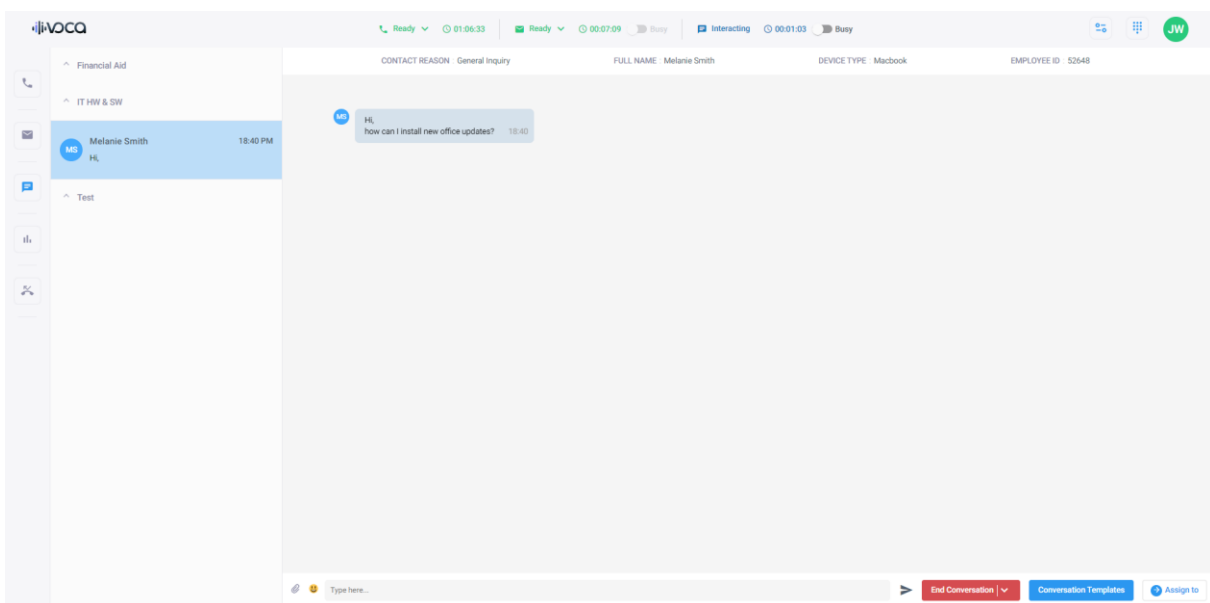
- In the pop-up chat notification box, do one of the following:
  - Click **Accept** to accept the chat.
  - Click **Decline** to reject the chat.

## 6.3 Responding to a Chat Message

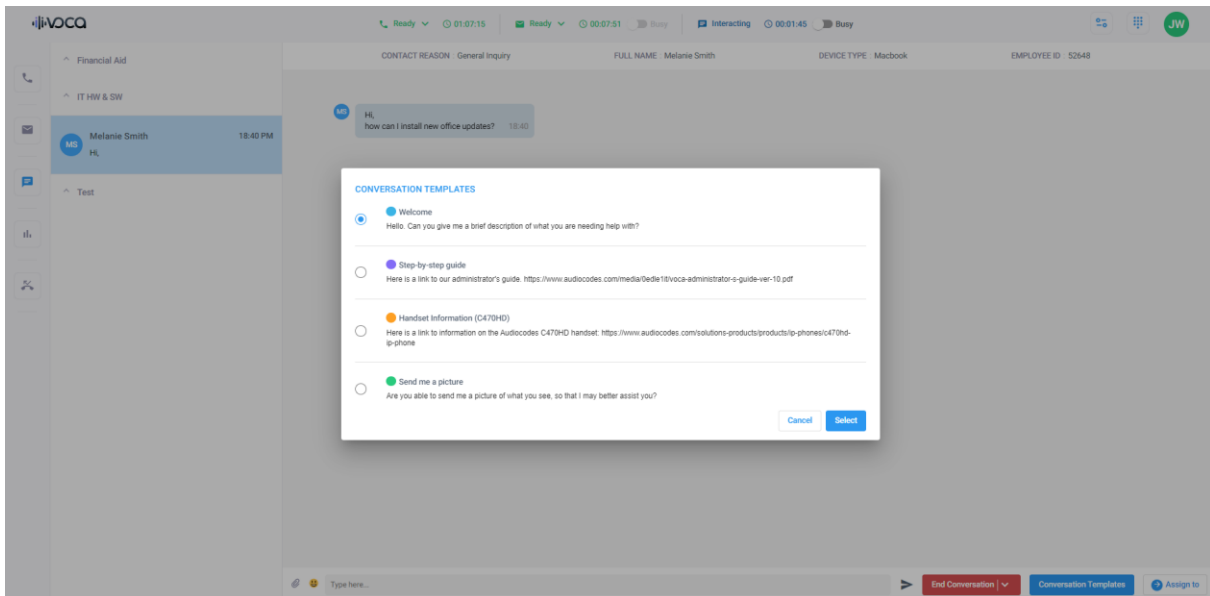
When you accept a webchat, you can respond to the customer's message, by typing an answer or by inserting a predefined answer from a template called *Conversation Templates*. If you use a predefined answer, you can also edit it to suit the chat's content.

#### To respond to webchat messages:

1. In the left pane, click the listed chat that you accepted; its contents are displayed in the right pane and the chat session begins:



2. Typing an answer:
  - a. In the textbox located at the bottom of the chat window, type an answer.
  - b. Click the arrow button to send it.
3. Using a predefined answer:
  - a. Click the **Conversation Templates** button located below the chat window; the Conversation Templates dialog box appears:



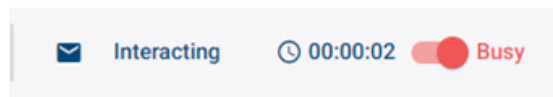
- b. Select the relevant template, and then click **Select**; the predefined answer appears in the chat's textbox.
- c. Edit the inserted predefined answer if required, and then click the arrow to send it to the chat session.

## 6.4 Stopping New Interactions

While you are handling a chat interaction, you may choose to stop receiving new interactions (voice, email and chats). This may be useful, for example, if you are dealing with an interaction that requires a lot of time, or if you are planning on taking a break when you finish the current interaction.

**To stop receiving new webchats:**

- On the shift status bar, click the **Busy** toggle switch button so that "Busy" appears in red, as shown below:



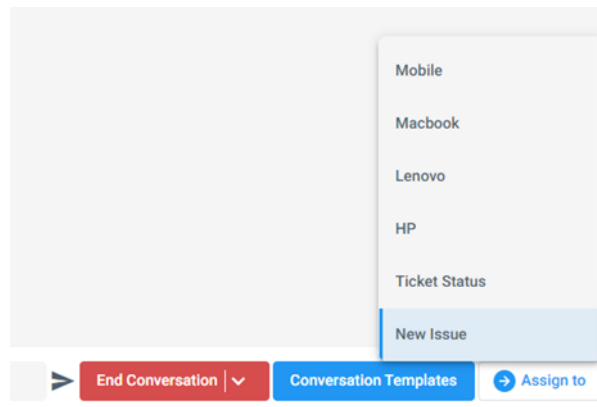
If you want to resume receiving interactions, click the toggle switch again.

## 6.5 Assigning a Webchat to Different Queue

You can assign a webchat to a different queue. This can be useful if, for example, you find the webchat isn't within your queue's responsibilities, or the customer asks for further assistance regarding a different issue.

### To assign webchat to different queue:

1. Open the webchat channel.
2. Click the **Assign to** button, located below the chat; a drop-down list appears, listing available different queues, as shown in the following example:



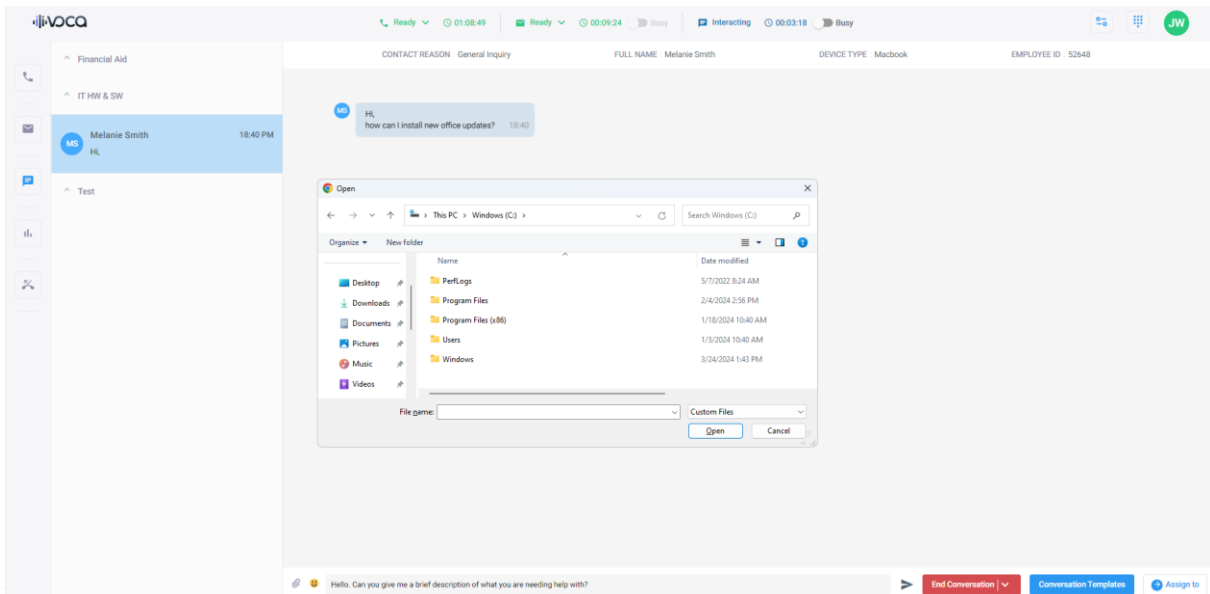
3. Select a queue; the chat is assigned to the selected queue and your status reverts to "Ready".

## 6.6 Attaching a File to a Webchat

You can attach a file to a chat session.

### To attach file:

1. Open the chat.
2. Click the **Attach** icon located at the bottom of the chat; a dialog box appears:



3. Choose the desired file, and then click **Open**.
4. Send the file to the customer, by clicking the arrow button.



## 6.7 Ending and Wrapping Up a Webchat Interaction

The chat session ends when you or the customer disconnects the session.

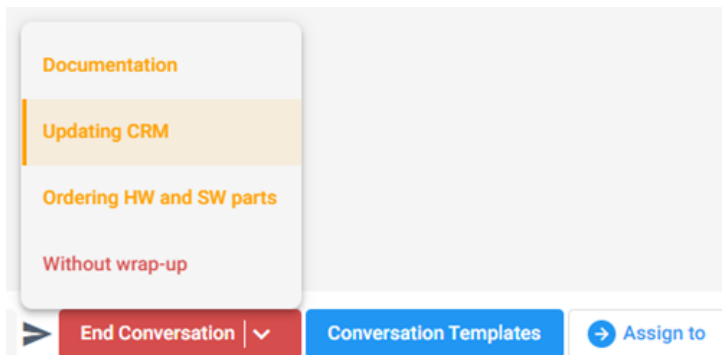
Once you finish a chat interaction, you have a predefined time to summarize (*wrap-up*) the interaction. The wrap-up can be used, for example, to update documentation, update your organization's CRM, or any other organizational need.



- If a chat session reaches a predefined session timeout, the session ends automatically.
- Ended chat sessions are automatically deleted from the Worker Application.

**To wrap-up chat interaction:**

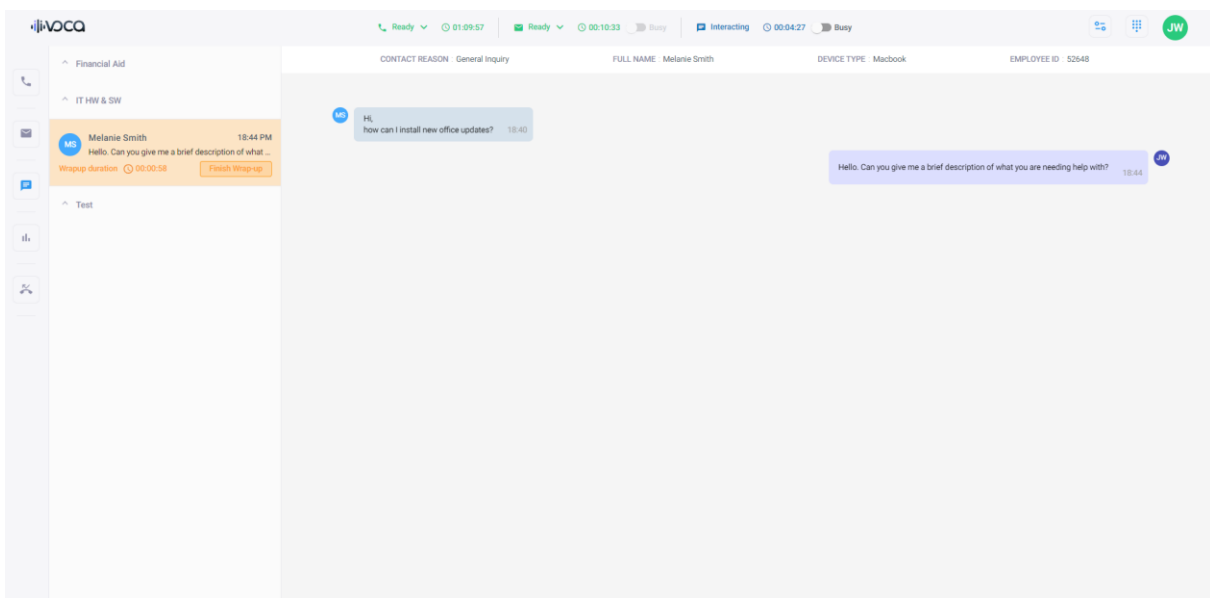
1. In the chat session, click the **End Conversation** button; a drop-down menu appears, listing available wrap-up options, as shown in the following example:



2. Select a wrap-up reason; the chat session ends. In addition, the left pane displays the listed chat highlighted in a background color and a countdown is activated to complete the selected wrap-up. If you finish the wrap-up before the countdown ends, click the **Finish Wrap-up** button. If the counter expires and you haven't clicked the button, the wrap-up ends automatically, and you're reverted to "Ready" mode.



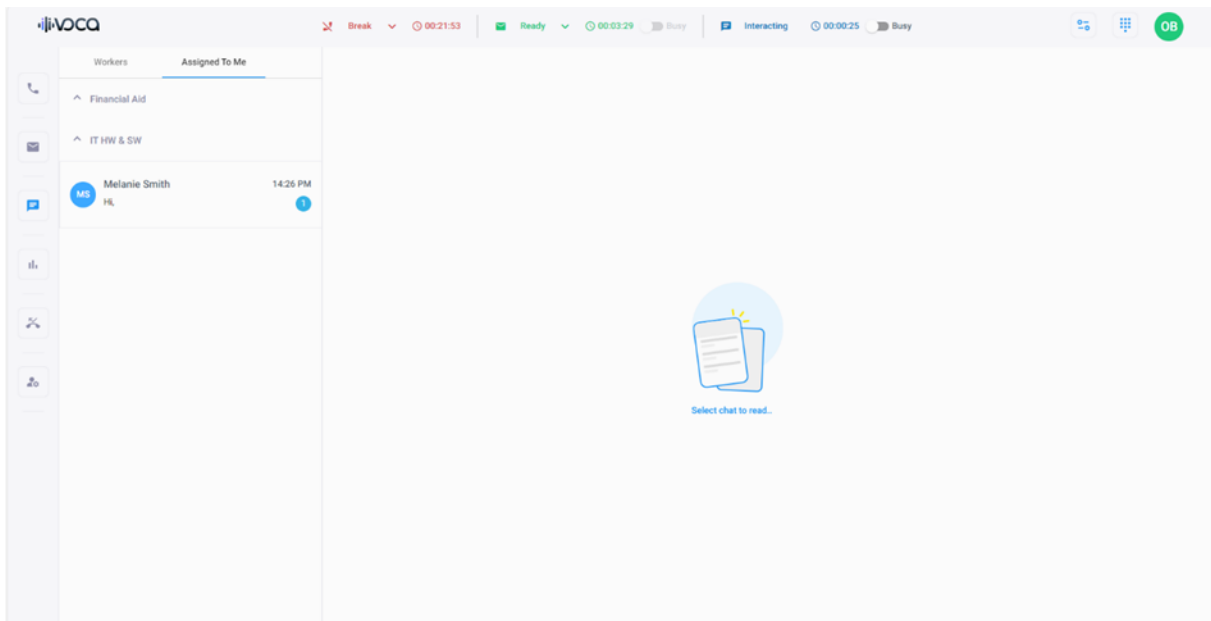
You can choose not to wrap-up the interaction, by selecting **Without wrap-up**. In this scenario, your status immediately changes to "Ready".



## 6.8 Supervisor View

In Supervisor mode, the webchat channel's left pane provides two tabs:

- **Workers:** Lists all the Workers assigned to the Supervisor and the associated queues.
- **Assigned to me:** Lists all the webchats the Supervisor is assigned to handle. The webchats in the list are ordered under the name of the associated queues.



## 7 Queue Statistics

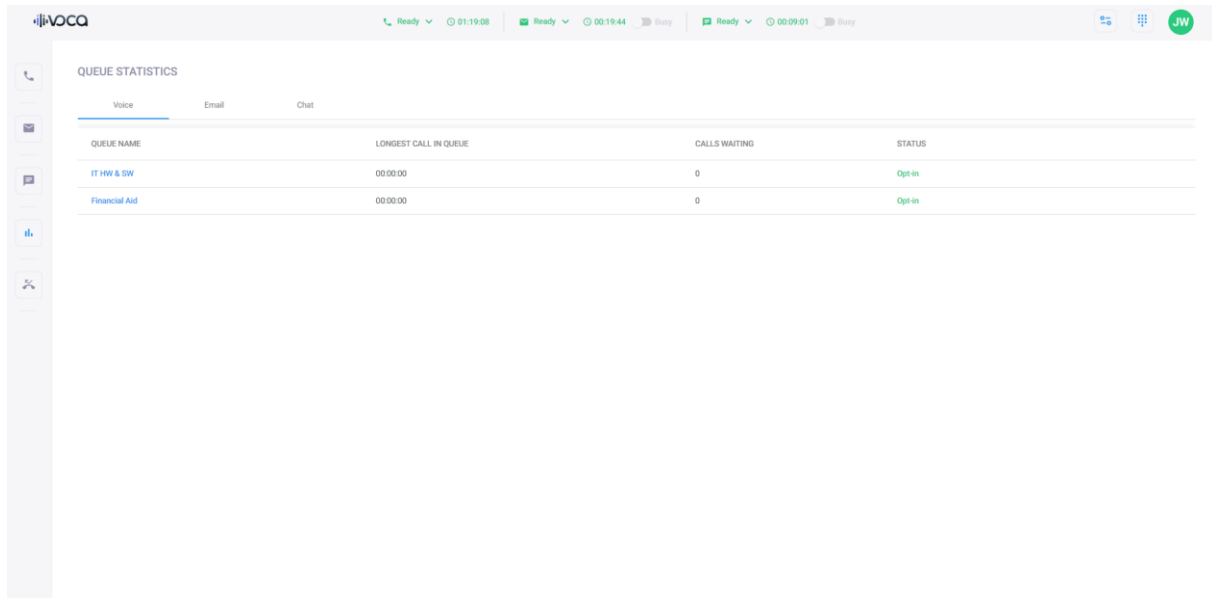
Queue statistics is displayed for the Worker or Supervisor Application.

### 7.1 Viewing Worker's Queue Statistics

You can view statistics of your assigned queues per channel.

To view queue statistics:

1. On the sidebar, click the **Queue Statistics**  icon; the Queue Statistics page opens:



The screenshot shows the 'QUEUE STATISTICS' page in the VOCA application. At the top, there are tabs for 'Voice', 'Email', and 'Chat'. Below the tabs is a table with the following data:

QUEUE NAME	LONGEST CALL IN QUEUE	CALLS WAITING	STATUS
IT HW & SW	00:00:00	0	Opt-in
Financial Aid	00:00:00	0	Opt-in

2. Select the relevant channel tab (**Voice**, **Email**, or **Chat**); a table displays the queue statistics for the selected channel:

Field	Description
Queue Name	Displays the name of the queue.
Longest Call in Queue	Displays the longest time a call/email/webchat has waited in the queue.
Calls Waiting	Displays the number of calls/emails/webchats that are currently waiting in the queue.
Status	Displays the current status of the Worker in the queue.

## 7.2 Viewing Queue Statistics (Supervisor Only)

The Supervisor can view statistics of assigned queues per channel.

To view queue statistics:

1. On the sidebar, click the **Queue Statistics** icon; the Queue Statistics page opens:

The screenshot shows the Voca Queue Statistics page. At the top, there are status indicators for 'Ready' and 'Busy' with associated timers. Below this, the 'QUEUE STATISTICS' section is visible, with tabs for 'Voice', 'Email', and 'Chat'. The 'Voice' tab is selected, displaying a table with the following data:

QUEUE NAME	CALLS IN QUEUE	LONGEST CALL IN QUEUE	READY	NOT READY	TALKING	OUTBOUND
IT HW & SW	0	00:00:00	1	0	0	0
Financial Aid	0	00:00:00	1	0	0	0

2. Select the relevant channel tab (**Voice, Email, or Chat**); a table displays the queue statistics for the selected channel:

Field	Description
<b>Voice Tab</b>	
Queue Name	Displays the name of the queue.
Calls in Queue	Displays the number of calls that are currently waiting in the queue.
Longest Call in Queue	Displays the longest time a call has waited in the queue.
Ready	Displays the number of Workers that are available to receive calls.
Not Ready	Displays the number of Workers that are not available to receive calls (e.g., on a break).
Talking (Inbound)	Displays the number of Workers that are currently handling inbound calls.
Talking (Outbound)	Displays the number of Workers that are currently handling outbound call.
<b>Email Tab / Chat Tab</b>	
Queue Name	Displays the name of the queue.
Interactions in Queue	Displays the number of email/webchat interactions that are currently waiting in the queue.
Longest Interaction in Queue	Displays the longest time an email/webchat has waited in the queue.
Ready	Displays the number of Workers that are available to interact with an email/webchat.

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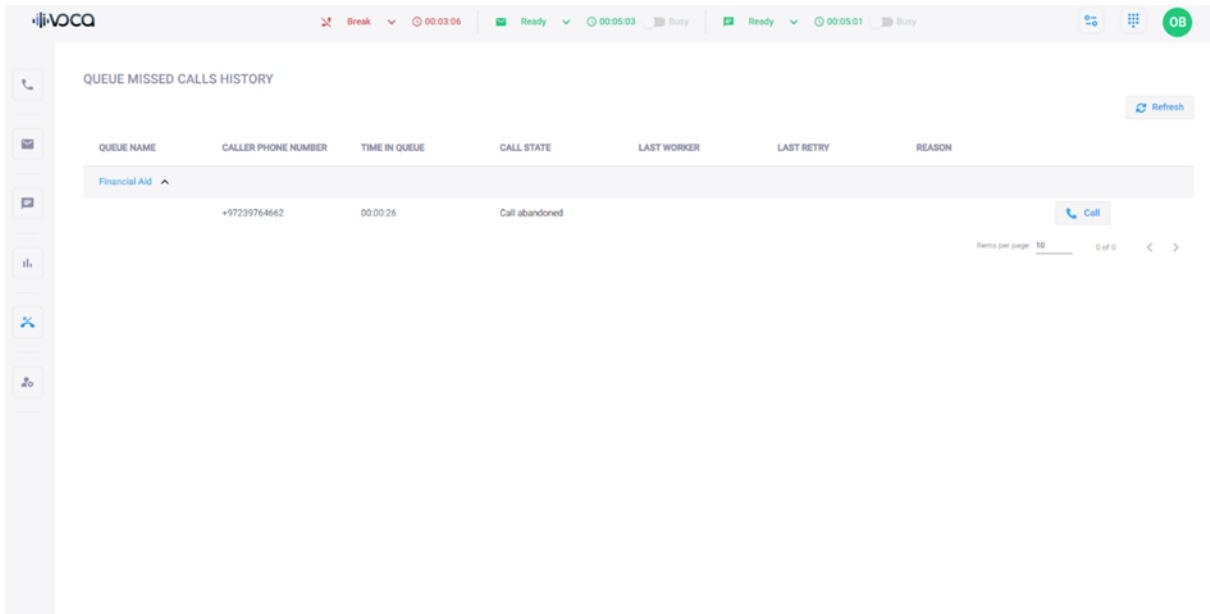
<b>Field</b>	<b>Description</b>
Not Ready	Displays the number of Workers that are not available to interact with an email/webchat (e.g., on a break).
Interacting	Displays the number of Workers that are currently in an email/webchat interaction.
Interacting (Busy)	Displays the number of Workers that are currently in an email/webchat interaction but have set their status to "Busy" (i.e., won't receive additional calls).

## 8 Viewing Missed Call Queues

You can view all calls that were not handled, along with the reasons for the missed calls. This helps you in making outbound calls to customers who were unable to connect with you during their initial call attempt.

To view missed call queues:



- On the sidebar, click the **Missed Calls**  icon; the 'Queue Missed Calls History' page opens:



The fields of the 'Queue Missed Calls History' table are described in the following table:

Field	Description
Queue Name	Defines the name of the queue.
Caller Phone Number	Defines the caller's phone number.
Time in Queue	Displays how long the caller waited for a Worker in the queue.
Call State	Represents all the abandoned calls.
Last Worker	Refers to the last Worker that called back to this caller.
Last Retry	Refers to the timestamp of the last call attempt by a Worker.
Reason	Displays the call attempt reason, for example, "Caller Busy" or "Caller Disconnect".

The page allows you to do the following:

- Call the Customer:** You can call the customer, by clicking the **Call**  button.
- Refresh the table:** You can refresh the table by clicking the **Refresh**  button.

## 9 Team Management (for Supervisors)

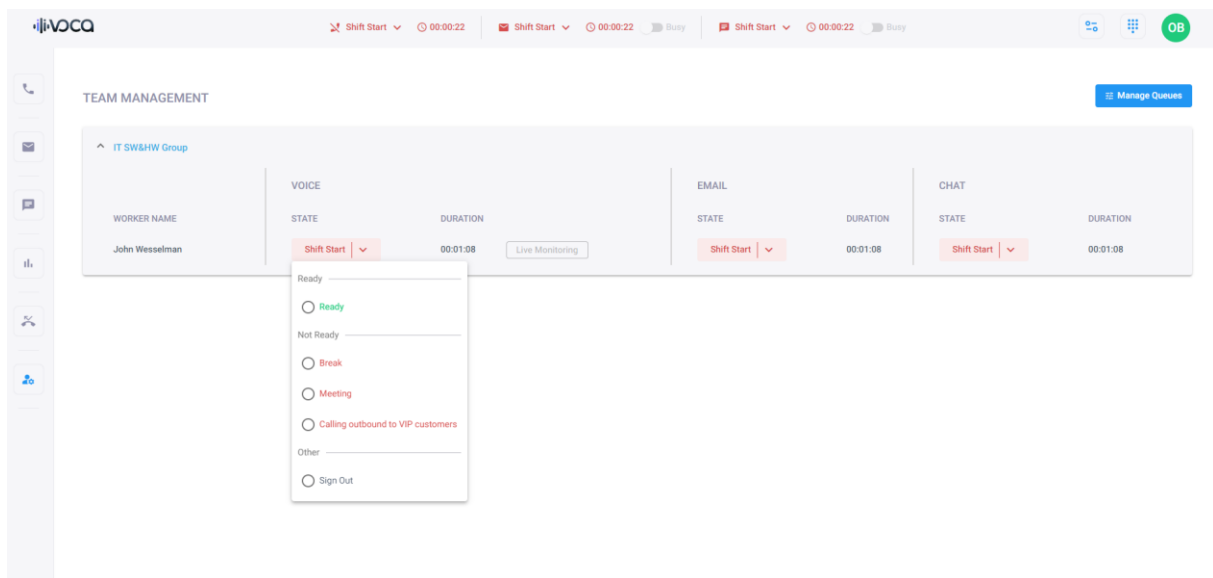


This section is intended for **Supervisors** only.

Team Management functionality enables Supervisors to oversee the Workers on their team. Supervisors can view the names of Workers listed in each queue, together with the interaction channel.

**To access Team Management page:**

- On the sidebar, click the **Team Management**  icon.



Team Management includes the following:

- [Live Monitoring](#)
- [Signing out Workers](#)
- [Manage Queues](#)

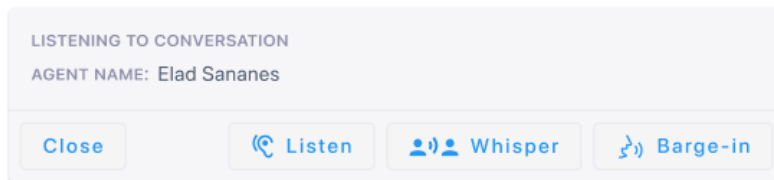
### 9.1 Live Monitoring of Workers

Live Monitoring allows Supervisors to monitor their Workers by joining live calls between the Worker and the customer, with the option to do the following:

- **Listen:** Listen to the conversation.
- **Whisper:** Supervisors can assist the Workers by speaking privately to them during the conversation.
- **Barge-in:** Supervisors can join the conversation directly.

**To monitor a Worker:**

1. Select the required queue.
2. Click the **Live Monitoring** button corresponding to the required channel of the Worker; the following pop-up appears:



3. Do one of the following:
  - Click **Listen** to listen to the conversation.
  - Click **Whisper** to speak privately to the Worker (Customer doesn't hear) during the conversation.
  - Click **Barge-in** to join the Worker and customer conversation.

## 9.2 Signing Out Workers

Supervisors can sign out Workers if they haven't properly signed out when their shift ends (as described in Signing Out).

**To sign out a Worker:**

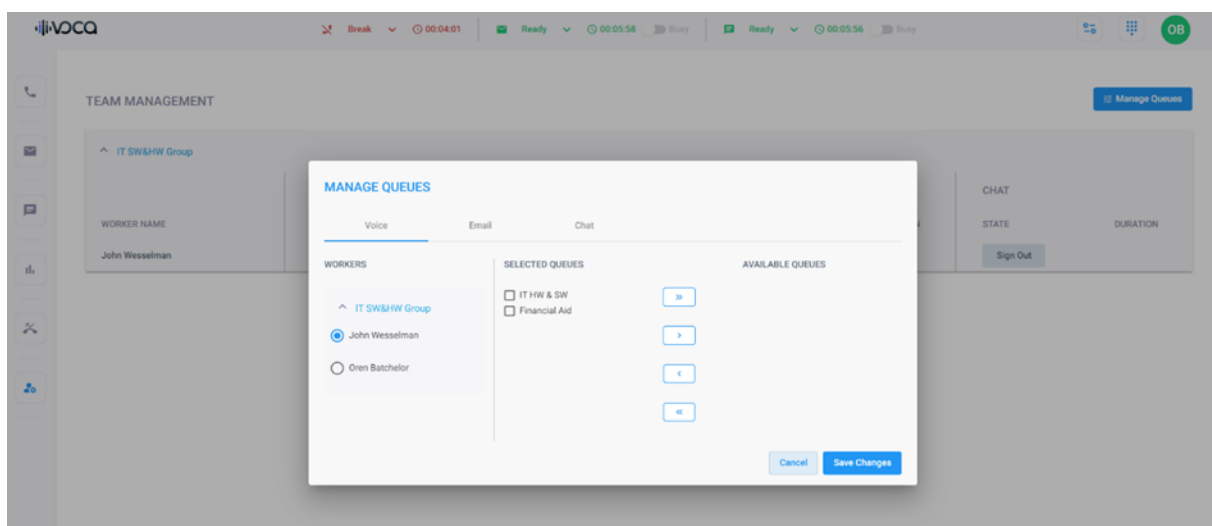
1. Select the required queue.
2. Click the **Sign Out** button corresponding to the required channel of the Worker.

## 9.3 Managing Queues

The Supervisor can move Workers in and out of queues using the following steps:

**To opt a Worker in or out of queues:**

1. Click the **Manage Queues** button; the following dialog box appears:



2. Select the **Voice**, **Email**, or **Chat** channel tab.
3. Select the Worker from the required group.
4. Use the arrows to move the Worker between 'Selected Queues' (queues to which the Worker is currently associated with) and 'Available Queues' (queues that the Worker is not associated with. But available).
3. Click **Save Changes**.



## 10 Logging Out of Worker Application

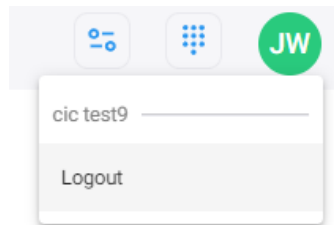
When you've finished your shift, you must log out of the Worker Application.



- You can only log out when your shift status for all channels is "Shift End" (see Changing Shift Status per Channel for changing status).
- If you forget to log out, your Supervisor can log you out using the 'Team Management' page (see Signing Out Workers).

### To log out of Worker Application:

1. Click your profile icon located on the top-right corner of the window, a drop-down menu appears:



2. Click **Logout**.

**International Headquarters**

Naimi Park  
6 Ofra Haza Street  
Or Yehuda, Israel  
Tel: +972-3-976-4000  
Fax: +972-3-976-4040

**AudioCodes Inc.**

80 Kingsbridge Rd  
Piscataway, NJ 08854, USA  
Tel: +1-732-469-0880  
Fax: +1-732-469-2298

Contact us: <https://www.audiocodes.com/corporate/offices-worldwide>

Website: <https://www.audiocodes.com>

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