User's Manual

AudioCodes Voice.AI Solutions

Voca Conversational Interaction Center

Flex Application

Version 12.0

Notice

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Document Revision Record

LTRT	Description
26624	New initial guide for release 12.0

Table of Contents

1 Introduction

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

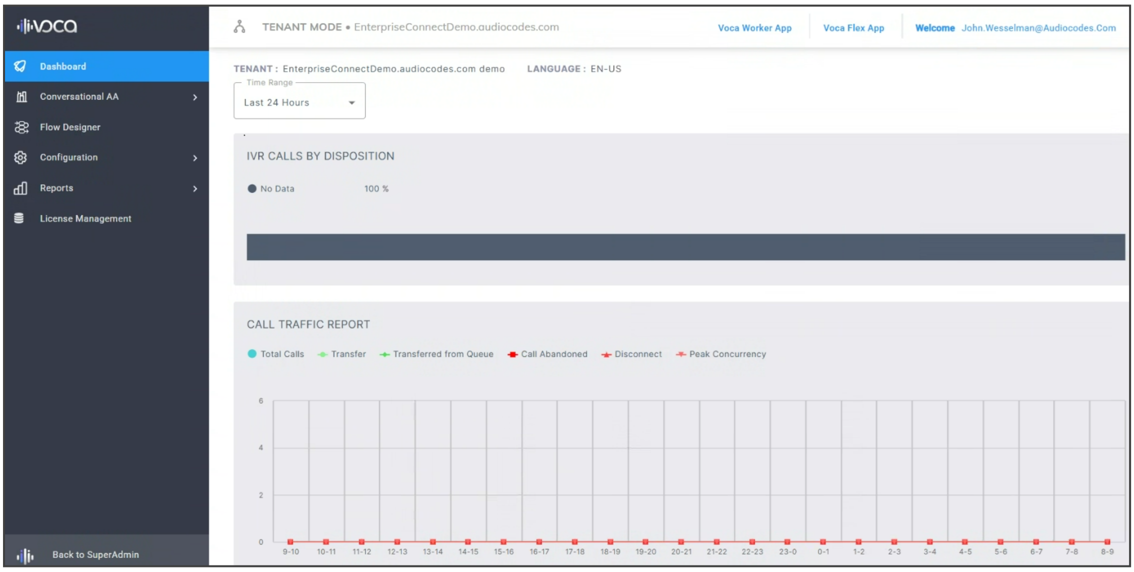
The Voca CIC Flex Application is a web-based application for Flex Members (Agents) to handle voice interactions and daily tasks tied to their roles, in one screen. From handling customer interactions to accessing real-time customer information, each step in this document powers Flex Members to masterfully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

2 Logging into Voca CIC Flex Application

The following procedure describes how to log into the Voca CIC Flex Application so that you can start using it.

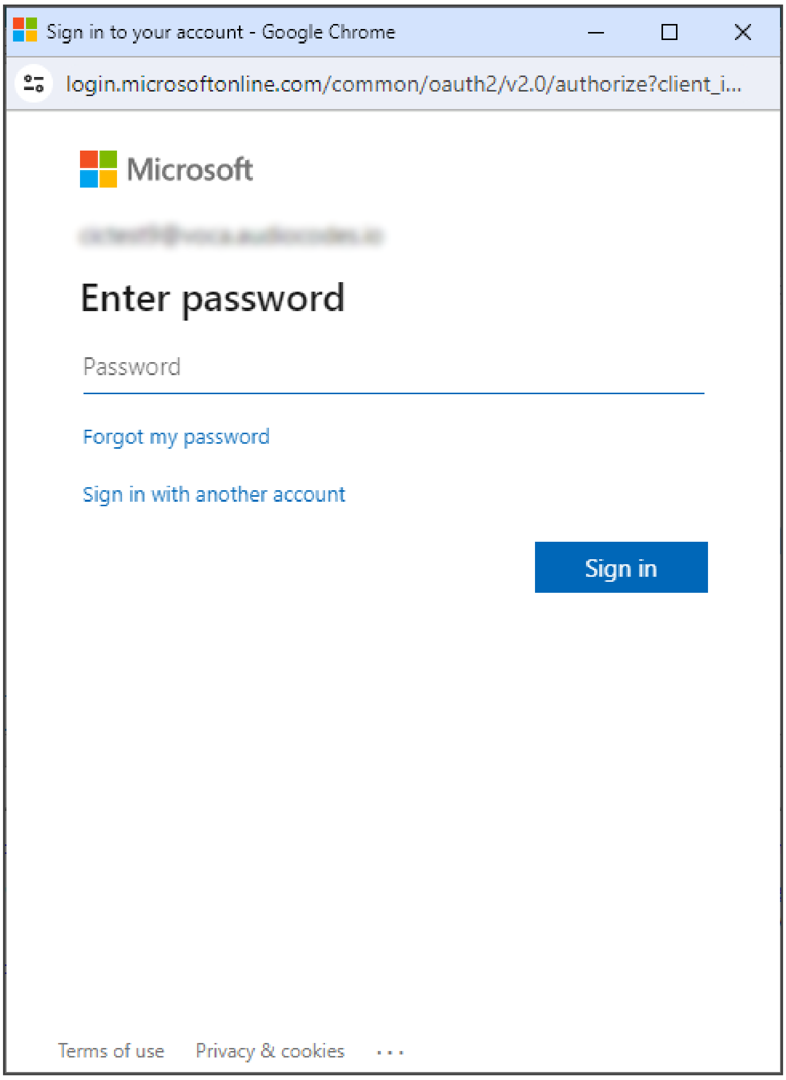
➢ To log in to Flex Application:

1. From the Navigation menu pane, select **Dashboard**, and then on the top bar, click the **Voca Flex Application** button:

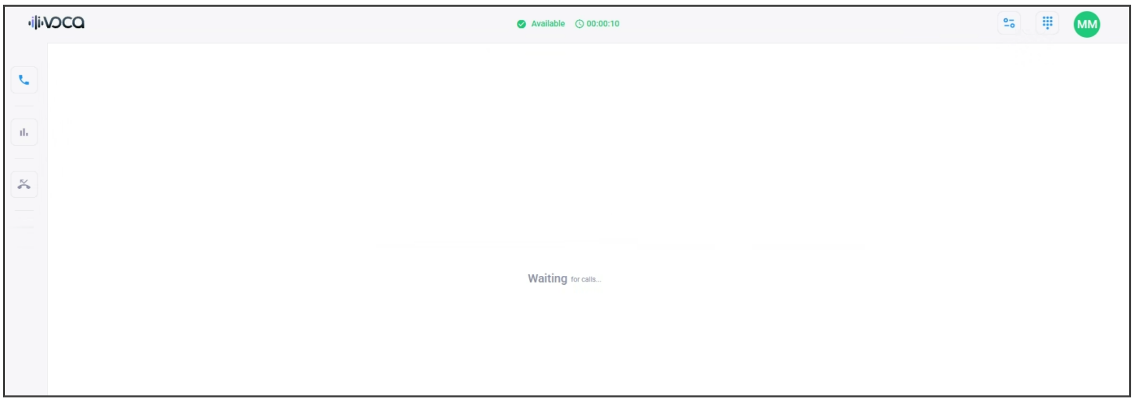


The Flex Member login page appears:

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



3. Enter your Flex Member's Microsoft account password (single sign-on / SSO), and then click **Sign in**; the Flex Application opens, as displayed below!



Enable direct dialing (Click-to-call)

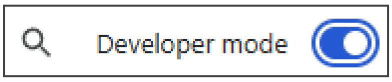
You can easily dial a number directly from any website with the Click-to-call feature. After you enable this feature, all you need to do is right-click a phone number and directly call the number.

This is only applicable for the Chrome browser.

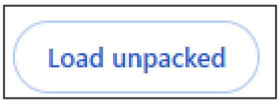
➢ **To enable Click-to-call:**

1. Log in to the AudioCodes portal and download the folder **VocaClick2Call.zip**.
2. Unzip the folder.
3. Go to the Chrome browser.
   a. To the right of the Search bar, click the Extensions icon .
   b. Click **Manage Extensions**.

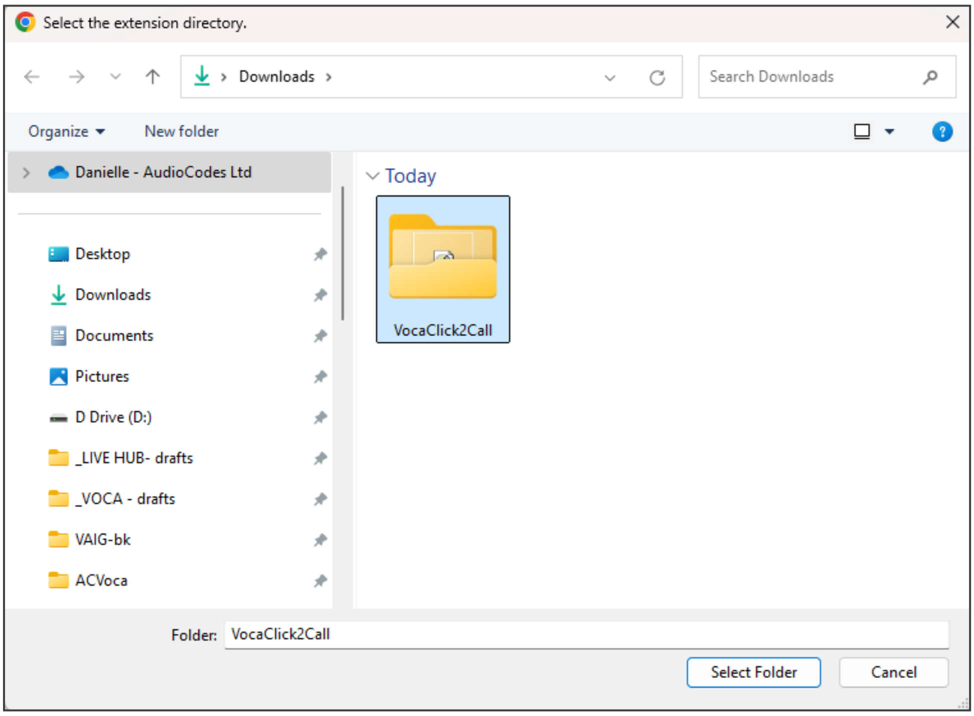
   c. On top right, enable **Developer Mode**.



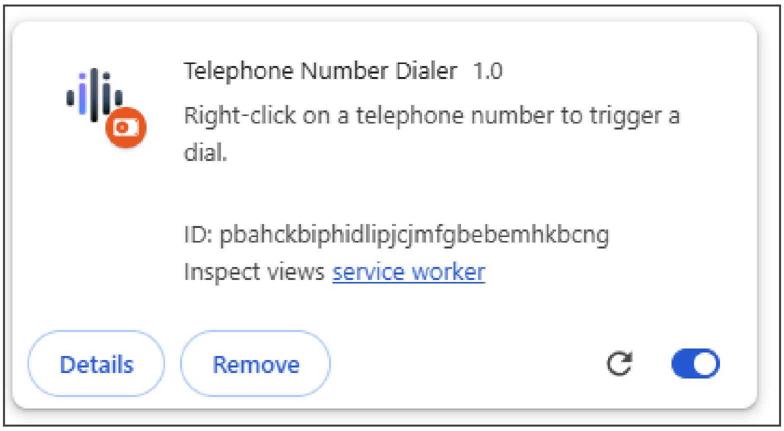
   d. Click **Load Unpacked**. Window appears.



   e. Select the folder from the Downloads folder and click **Select Folder**.



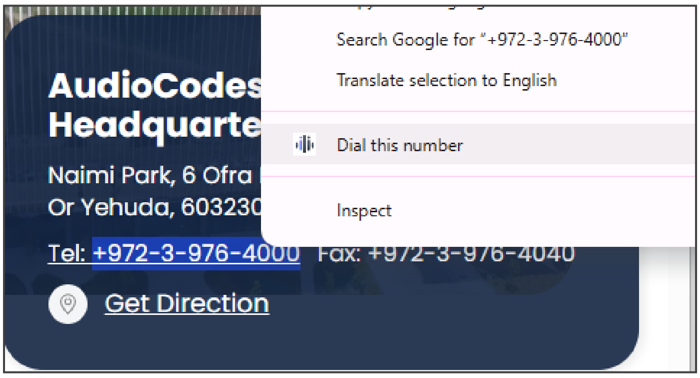
The Click-to-call extension is loaded.



Dial a phone number

➢ **To dial direct:**

1. Go to any website.
2. Select a phone number.
3. Right-click the phone number.



4. Click **Dial this number**.

3 Main Window

The main window of the Flex Application displays the following:

- Shift status bar
- Opt-in/out of queues
- Making calls
- Choose User Interface Language on page 10
- Sidebar:
  - Voice channel
  - Queue statistics
  - Missed calls queue
  - Team management (for Supervisors)

Shift Status Bar

The Shift status bar displays:

- Your shift status

Your Shift Status

Your shift status displays your Teams status. When your status is Available, you can always receive incoming calls.All other statuses are not defined by the Contact Center Admin, but are instead based on what is available and reflected in Teams.

Viewing Status Duration

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

For example, the status bar below indicates that you have been in "Available" status for seconds:

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

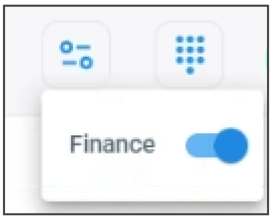
Opting In or Out of Queues

You can opt-in or opt-out of queues. 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 calls 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 queues:



Making Outbound Calls

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

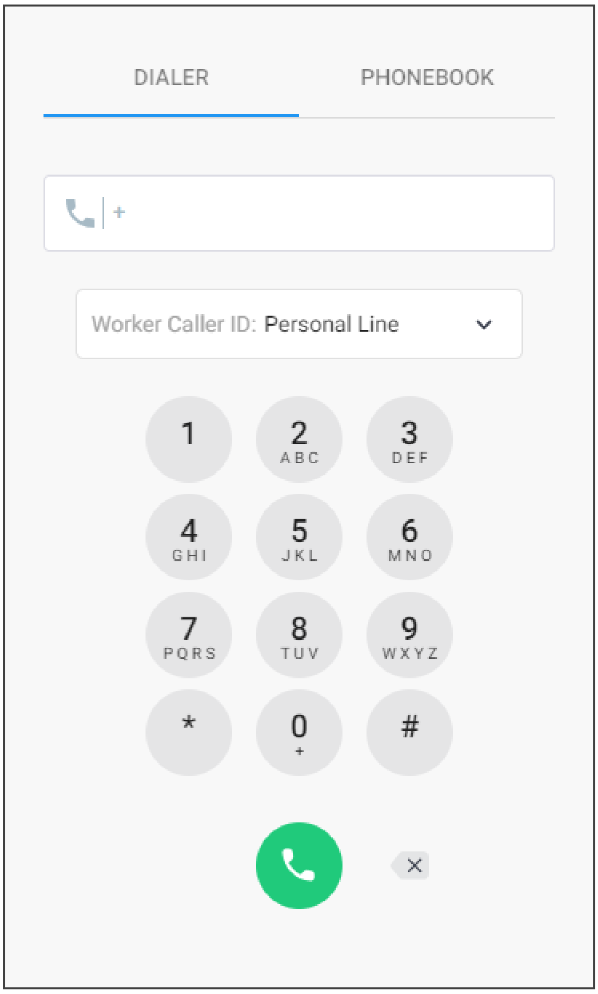
- Manually dialing the number using the dial pad
- Selecting a contact from your organization's phonebook

Making Calls with Dial Pad

You can make calls using the dial pad (dialer), by manually entering the desired number to 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 make a call with dial pad:**

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 dial pad, enter the desired phone number.
4. From the 'Flex Member 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.

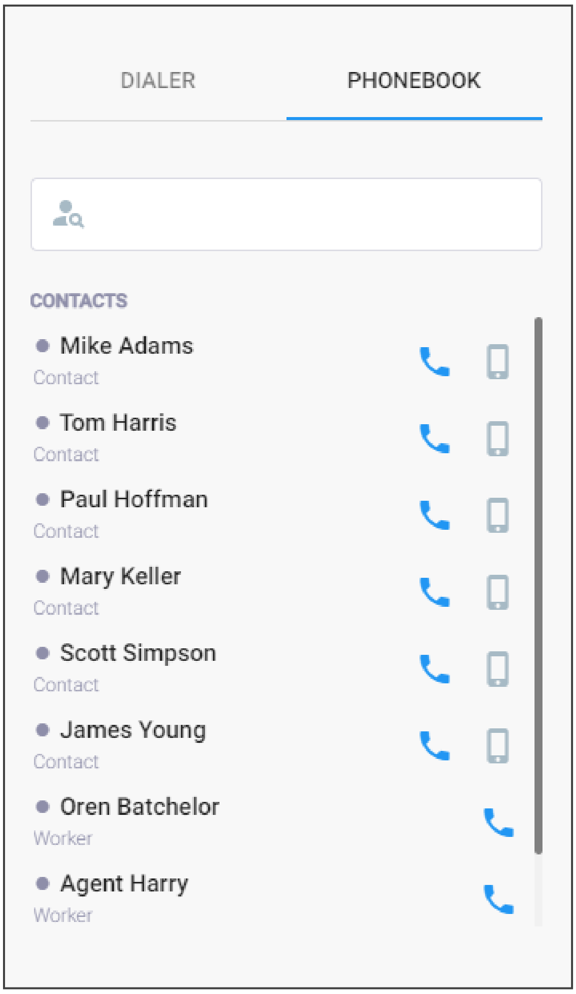
> The selected Caller ID option in the 'Flex Member Caller ID' drop-down list is saved for the next time you open the dialer.

Making a Call to a Phonebook Contact

You can call a contact (customer) that is listed in your organization's phonebook.

➢ 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.

Choose User Interface Language

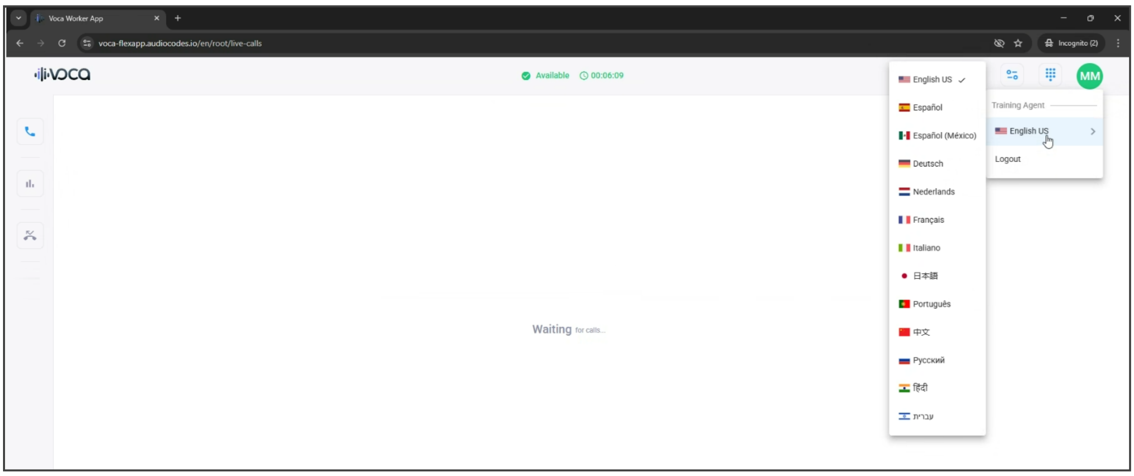
Flex Members can choose their preferred language for the Voca CIC Flex Application. The 14 languages , supported by Azure, include:

- English US
- Spanish
- German
- Dutch
- French
- Italian
- Japanese
- Português (Brazil)
- Chinese Mandarin
- Russian
- Hindi
- Hebrew

> Changing the interface language does not impact the communication language between the Flex Member and the customer.

➢ To change the interface language:

1. On the toolbar, click your profile icon located on the top-right corner of the window, and hover over the current language; a menu of 14 available languages appears.



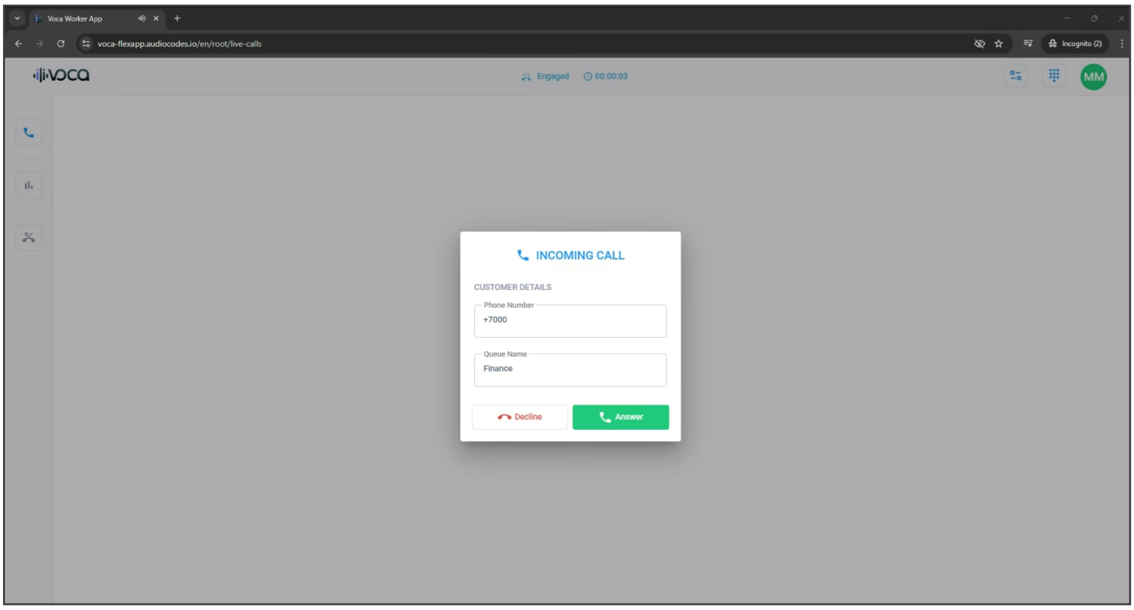
2. Select the language you want to set for the interface.

4 Voice Channel Interactions

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

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.

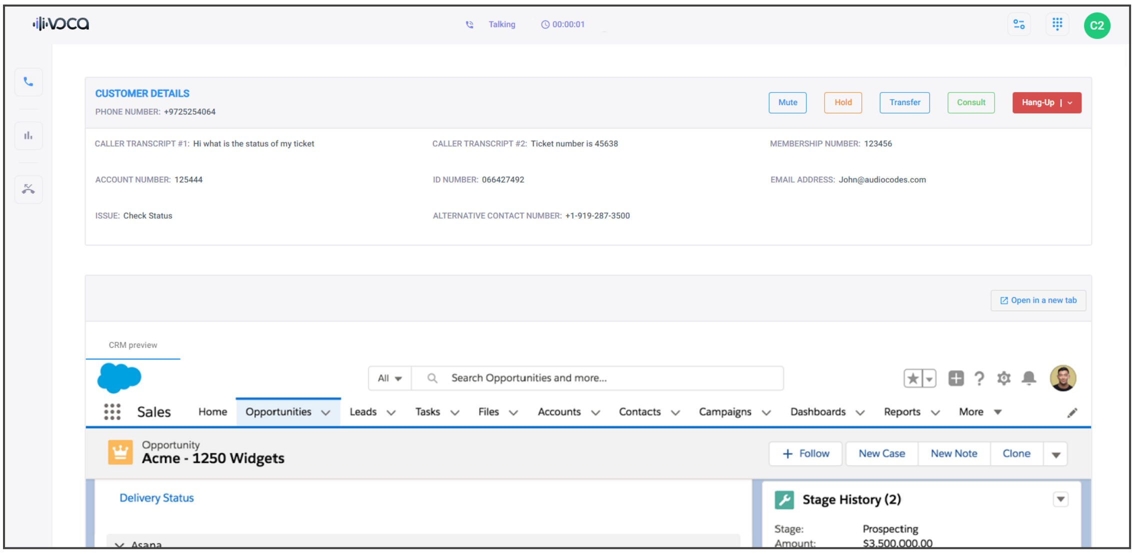


➢ To accept or decline a call:

- 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 status on the status bar changes to "Busy", and the following is displayed on the page:

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



Call Operations

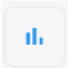
When you answer a call, the Customer Details group provides you with buttons that allow you to perform various call operations, as described in the following table:

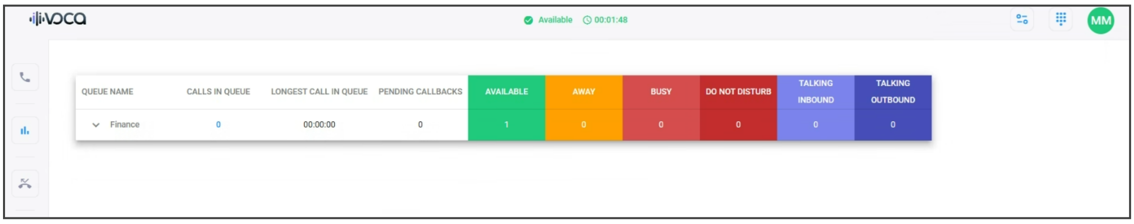
Button	Button Name	Description
Mute	**Mute**	Mutes the call on your side.
Hold	**Hold**	Puts the call on hold.
Transfer	**Transfer**	Transfers the call to another destination.
Consult	**Consult**	Puts the caller on-hold and connects you with a Supervisor for consultation. When consulting, there is an option to use a keypad.
Hang-Up	**Hang-Up**	Ends the call.
Transfer & Hang-Up	**Transfer & Hang-Up**	If you choose to consult with a Supervisor, clicking this button transfers the customer to the Supervisor and disconnects your call with the customer. After selecting this option, a drop-down menu appears listing wrap-up options for you to select.

5 Viewing Queue Statistics

Flex Members can view statistics of assigned queues per channel.

➢ To view queue statistics:

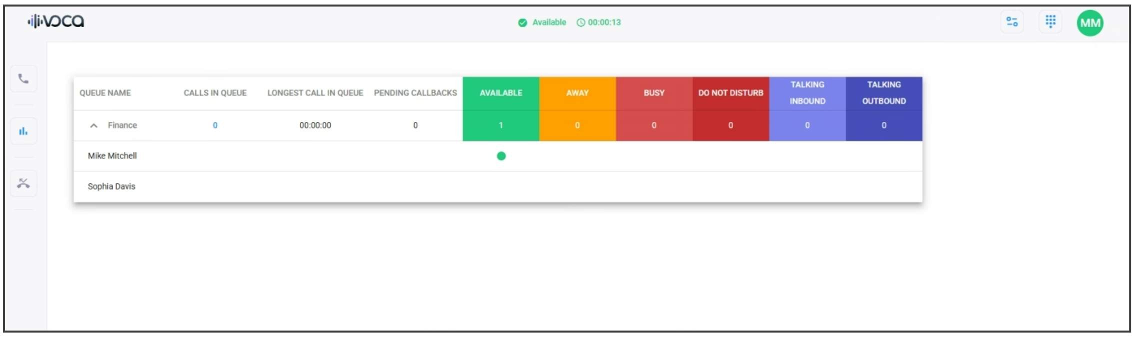
1. On the sidebar, click the **Queue Statistics**  icon; the Queue Statistics page opens:



2. A table displays the queue statistics for the selected channel:

Field	Description
Voice Tab	
'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.
'Available' / 'Away' / 'Busy' / 'Do not disturb'	Displays the number of Flex Members that their Team status is currently Available.
'Away'	Displays the number of Flex Members that their Teams status is currently Away.
'Busy''	Displays the number of Flex Members that their Teams status is currently Busy.
'Do not disturb'	Displays the number of Flex Members that their Teams status is currently Do not disturb.
'Talking (Inbound)'	Displays the number of Flex Members that are currently handling inbound calls.
'Talking (Outbound)'	Displays the number of Flex Members that are currently handling outbound call.

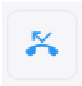
3. Expand the arrow next to the queue name to view the Flex Member's statuses in the queue.

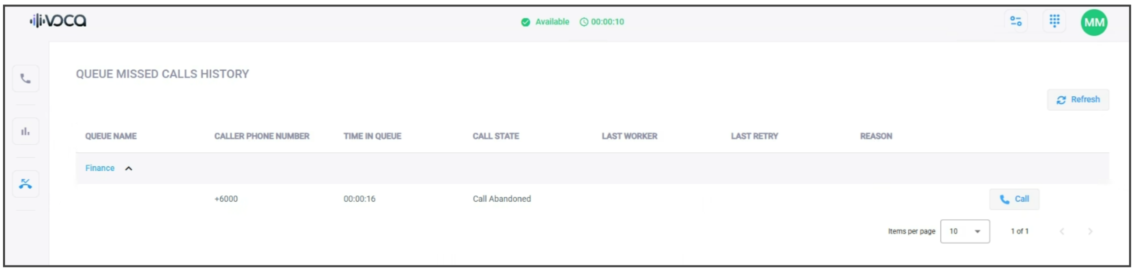


6 Viewing Missed Call Queues

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:

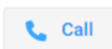
- On the sidebar, click the Missed Calls  icon; the 'Queue Missed Calls History' page opens:

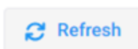


The fields of the 'Queue Missed Calls History' table are described in the following table:

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 Flex Member in the queue.
'Call State'	Represents all the abandoned calls.
'Last Flex Member'	Refers to the last Flex Member that called back to this caller.
'Last Retry'	Refers to the timestamp of the last call attempt by a Flex Member.
'Reason'	Displays the call attempt reason, for example, "Caller Busy" or "Caller Disconnect".

The page allows you to do the following:

- **Call a Customer:**You can call the customer, by clicking the **Call** 

button.
- **Refresh Table:** You can refresh the table, by clicking the **Refresh** 

button.

7 Team Management (for Supervisors)

This section is intended for Supervisors only.

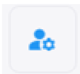
Team Management includes the following:

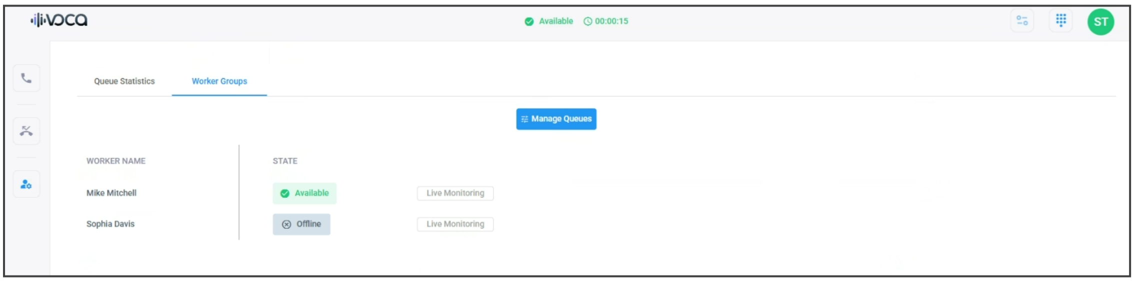
- Accessing Teams Management
- Queue Statistics
- Worker Groups
    - Live Monitoring of Flex Members
    - Manage Queues

Accessing Teams Management

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

➢ To access Team Management page:

- On the sidebar, click the Team Management  icon.



Flex Member Groups

See:

- Live Monitoring of Flex Members
- Manage Queues

Live Monitoring of Flex Members

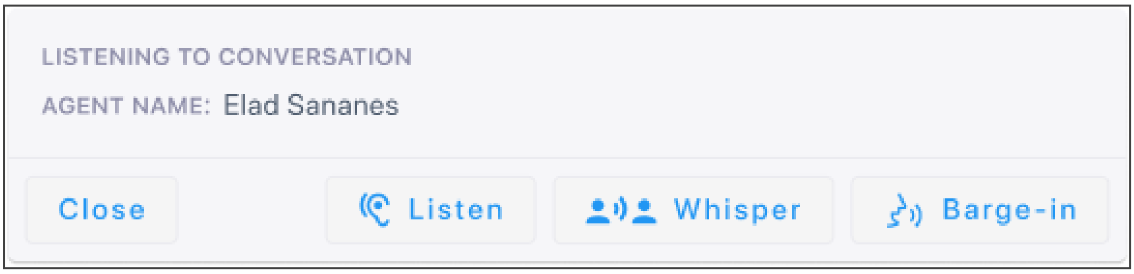
Live Monitoring allows Supervisors to monitor their Flex Members by joining live calls between the Flex Member and the customer, with the option to do the following:

- Listen to the conversation.

- Supervisors can assist Flex Members by speaking privately (*whisper*) to them during the conversation.
- Supervisors can join the conversation directly (*barge-in*).

➢ **To monitor a Flex Member:**

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



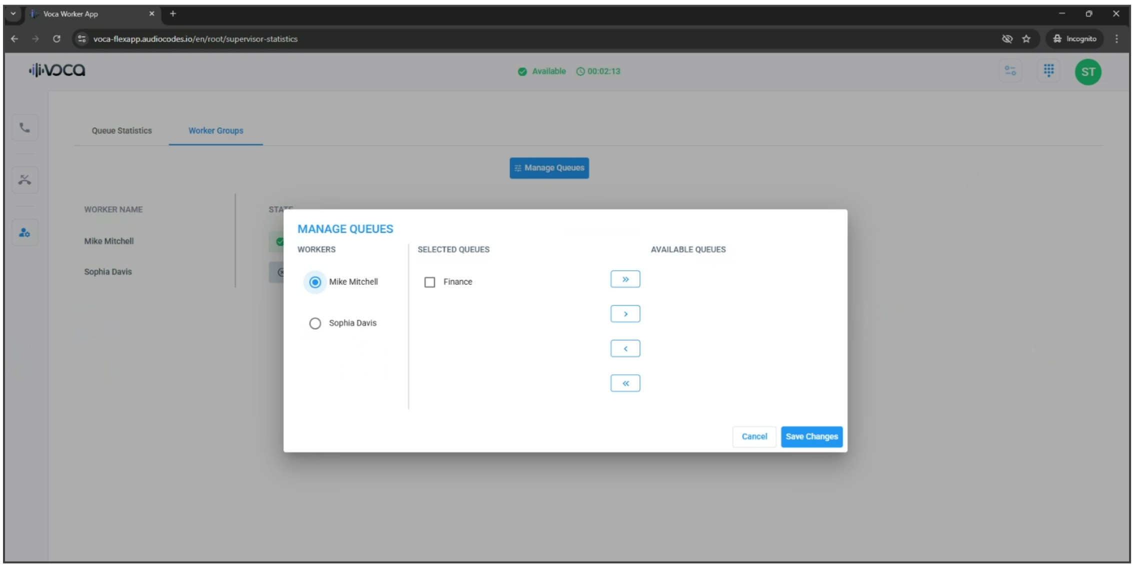
3. Click one of the following buttons:
   - **Listen** - to listen to the conversation.
   - **Whisper** - to speak privately to the Flex Member (Customer doesn't hear) during the conversation.
   - **Barge-in** - to join the Flex Member and customer conversation.

Managing Queues

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

➢ **To opt a Flex Member in or out of queues:**

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



2. Select the Flex Member from the required group.
3. Use the arrows to move the Flex Member between 'Selected Queues' (queues to which the Flex Member is currently associated with) and 'Available Queues' (queues that the Flex Member is not associated with, but available).
4. Click **Save Changes**.

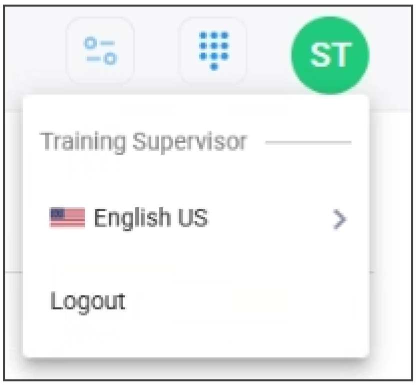
8 Logging Out of Flex Application

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

- You can only log out when you're not interacting ("Talking" shift status) with a customer.
- 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 Flex Application:

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



2. Click **Logout**.

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