



## Introducing TouchPoint

TouchPoint is our fresh, modern interface for contact center agents and supervisors. TouchPoint reinvents the user experience and has been designed to take up as little of your screen as possible, so you have more space to work with other applications you use to do your job. TouchPoint gives you just the info you need, as you need it.

### The Agent window

Log in/Log Out, go on Worktime/Break, Ask for Assistance, set Preferences

View agent activity and statistics

Dave Johnston  
**Logged In**  
Queues: 1 chat, 1 email

Queues Agents Recent Dashboard

Available Agents	Calls in Queue	Longest Wait	Service Level
Sales Queue - Normal	1   0		
Chat 1 - DAY	1   0		
EMAIL-SMPT - DAY	1   2	13 days	

Show Call Info

View Queue calls and statistics

View call information, Complete Wrapup, type notes in Scratch Pad

### The Call bar

Search for Contact or Make a Call

Search contacts and act on calls, e.g., Answer, Hangup, Hold, Forward, Wrapup, and add Notes

Drag this to move the bar around

All panels are movable and can be docked in convenient locations on your screen. The TouchPoint window can also be sized to display more information (drag and drop the sides of the window.)

## How to Answer a Phone Call

If you forget everything else that you learn from this guide, try to remember this one tip:

If you get a call and don't know how to answer it, you can always just pick up your phone!

## Logging In to Take Queue calls

- Hover over the **Agent State Panel**, then click Log in to Queues
  - Click again to log out from taking Queue calls
- Click the same location to Exit TouchPoint and close the window

TouchPoint

Set Forwarding

Log in to Queues

Agents Recent

Preferences Change your preferences or set your passcode

Change Login Class Change the queues you take delivery from

TouchPoint

Dave Johnston  
**Log in to get queue calls**

## Worktime and Break

### Worktime

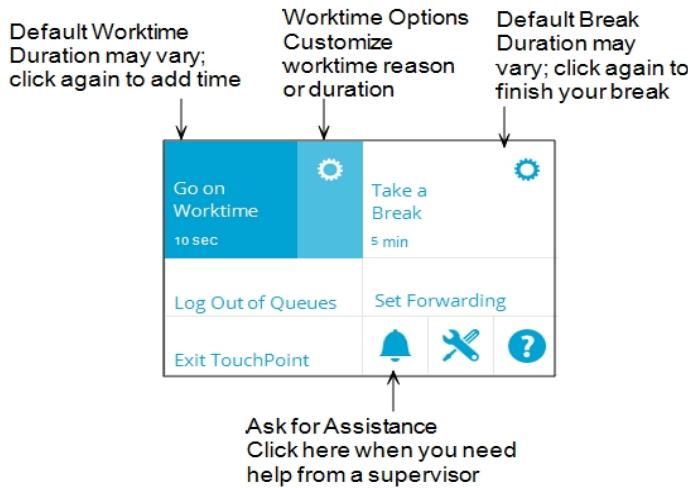
Use Worktime when you need to perform Non-queue calls related work task. This prevents Queue calls from being delivered to you while you are working on other projects.

### After-Call Worktime

You can be automatically placed on Worktime after completing a Queue call, giving you time to complete any call-related tasks before a new call is delivered to you. This is set by the system administrator.

### Break

Put yourself On a Break when you are temporarily unable to take Queue calls due to a non-work related reason (e.g., lunch, morning/afternoon break, bathroom break, etc.)



## Working with a Call

The **Call bar** fits conveniently on your Taskbar and serves multiple functions:

- Answer calls
- Hangup on calls (click End)
- Hold calls
- Transfer calls (click Find)
- Wrap up calls
- Add Notes to the **Scratch Pad**
- Clicking the 'flower' displays the larger **Agent window**



If you are on more than one call, the Call bar will stack the calls on top of each other so you can easily swap between them.

### TakingNotes During a Call

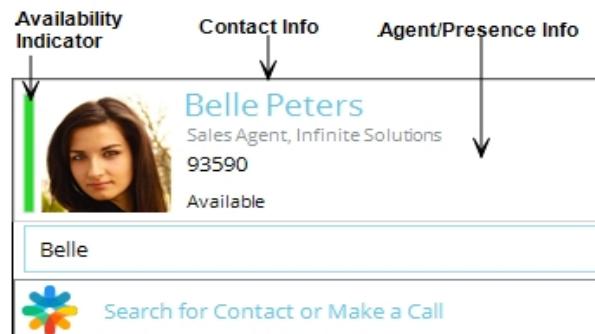
When you take a phone call the **Call Info Tab** automatically displays. At the bottom of this tab is a section called the **Scratch Pad** that you can use to takeNotes about that call. This information does not save in any way, but you can use it to copy and paste into other locations (as you can with the rest of the call information that displays on this tab.)

## Searching for a Contact

Use the Find feature of the **Call bar** to locate coworkers and people in the Phonebook. Once you've located the person you can then call them, transfer calls to them, or chat with them. You can search for a contact using any of the following: name, phone

number, company, department, job title, or Microsoft Lync SIP Address.

1. Click **Search for Contact or Make a Call** from the **Call bar**
2. Start typing any of the search criteria listed above; a list of matching contact cards will appear
3. Click the contact card to call the contacts default number or hover your mouse on the contact card to...
  - Call their mobile (if the number is in the Phonebook)
  - Leave a message directly in their mailbox (if they have a Zeacom mailbox)
  - Chat with that contact (internal only)



## Demand a Queue call

There are two ways to Demand Queue calls:

- To Demand the longest waiting/highest priority call from all queues, hover over the Call bar and select Request Call
- To Demand the longest waiting/highest priority call from a specific queue, hover over the name of a queue from the Queues tab and select **Request Call**.

## Queues Tab

Queues are grouped based on how you take calls from them.

- |         |  |
|---------|--|
| Primary | Take calls from these queues right away    |
| Delay   | Take calls from these queues after a delay |
| Demand  | You'll only get calls if you request them  |

### Queue Alerts

Queue alerts tell you when a queue goes over one or more of the limits set by your System Administrator. When this happens we'll:

- Show a counter icon **!** on the **Queues Info Panel Tab** to tell you how many queues are affected
- Show an alert icon **!** next to the name of the queues that are having issues
- Highlight the affected columns, so you can easily see where the problem is
- A screen-pop will appear letting you know the queue is in alert

**Tip:** We'll remove the alert icon and column highlighting when the queue is back under control.

## Agents Tab

Agents' statuses are displayed. This tab shows who is: logged in, on a break, in worktime, or on a call, etc. It also displays which agent login class they are logged into.

	Queues	Agents	Recent
Available	Time in this State	Total Calls	Total Logged in Time
Dave Johnston - Sales	4:51	7	55:51
Belle Peters - Support	4:42	3	22:47
Jess Stratton - Support	3:52	19	1:28:12
Wilma Stern - Sales	14:32	27	3:47:39

**Note:** This tab is not visible by default but can be enabled by your system administrator within Administrator Security settings.

## Recent Tab

Displays your call history and any call wrapups that are pending.

	Queues	Recent
Completed	Name or Number	Date and Time
Wilma Stern		8:15:20 a.m.
Jess Stratton		7:47:00 a.m.
→ 93538		7:14:21 a.m.

## Working with Wrapups

After a call has been completed, wrapup codes are chosen to designate what that call was about. Companies use these codes to determine training priorities, marketing strategies, development changes, etc. Each queue can have its own unique wrapup templates.

Click the **Wrapup Tab** at any time during the call or it will screen-pop automatically once you hangup the call. Some wrapups also require entering free-form text before you can complete the wrapup.

Interaction Info

Wrapup

11:44 a.m., Thursday, 28 November 2013

**Wilma Stern**  
Infinite Solutions  
+1 (999) 9999938

▼ 1. Why did they call?

- 1. Service Enquiry**
- 2. Product Enquiry

**Free-form Text**

Enter your free-form text...

## The Call Info Tab

When you answer a call the Call Info tab displays in TouchPoint. This tab 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.

Interaction Info

Scratch Pad

11:44 a.m., Thursday, 28 November 2013

**Wilma Stern**  
Infinite Solutions  
+1 (999) 9999938  
[wilma.stern@infin.net](mailto:wilma.stern@infin.net)

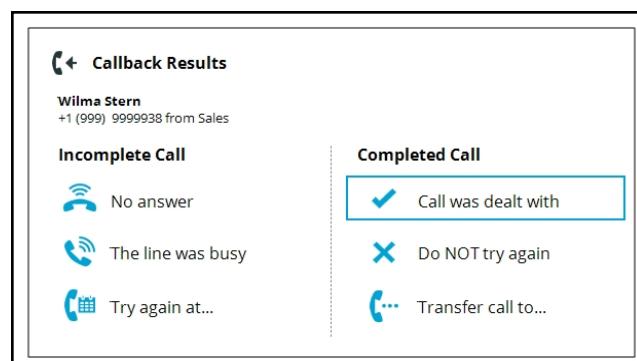
Enter your notes...

Show Stats

All of the information displayed in the Call Info tab can be highlighted and copied (**Ctrl+C**) if you'd like to paste it (**Ctrl+V**) into another application. If the Phonebook has an email address for the caller it will display and this email address can be clicked on if you'd like to send that caller an email. Expand the Last Called (call history) list to see previous contacts into your business.

## Dashboard Tab

Displays statistics related to agent productivity. Shows information like Break time, Work time, Total Calls, active calls, Average Handle Time, etc.



If you were successful in contacting the caller choose *Call was dealt with* and the callback will be marked as complete. When you choose *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.

## Help

TouchPointhelp is an excellent way to learn about any particular function or feature within the application.

Press **F1** on your keyboard while the application is active and TouchPointwill give you help on whatever topic you are viewing at that time.

## Processing Callbacks

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

### Answer a Callback

When a callback is delivered, you answer it just like a regular queue call. If the caller left a message, then the message plays automatically.



At this time 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

For every callback you answer, you must resolve the callback to inform the system of the call's result. Click **Resolve Callback** from the Call Control Widget.