

User Terminal (v1)

Training Course



Course Description:

User Terminal (v1), here you will learn about the tool from the start. Anyone who is not aware of how to work on User Terminal will benefit from this training course. The training course starts with an orientation of the User Terminal (v1) purpose and then explores the functionality at the heart of User Terminal (v1): logging in & out and taking a first phone call.

The course divided into the following three lessons, each dealing with a particular function of User Terminal (v1).



Lesson 1: User Terminal (v1) introduction

Getting started with User Terminal (v1) and its purpose in contact centre.



Lesson 2: Logging in & Out of User Terminal (v1)

Before you take your first phone call in User Terminal (v1), learn how to log in & Log out.



Lesson 3: Taking your first phone call

You are familiarised with the Logging in & Out of User Terminal (v1), learn how to take your first phone.



Lesson 4: Good to know

Learn the vital information pertaining to the User Terminal (v1) icons.

1. Introduction

User Terminal (v1) is an intuitive tool that enables users to communicate with their customers and co-workers through phone calls. It is your gateway for handling calls (both inbound and outbound). Supervisors can use User Terminal (v1) to monitor and coach their teams.

It allows the User to contact: our customers, make and transfer a call, put the customer on hold, and also to terminate the call.

User Terminal (v1) plays a notable role in increasing user productivity. It lets the users spend less time navigating different systems and consequently increases their productivity and engagement.

The vital capabilities of this tool include:



-  Inbound calls
-  Outbound calls
-  Voice recording
-  Contact information management
-  Track customer journeys

2 Application access

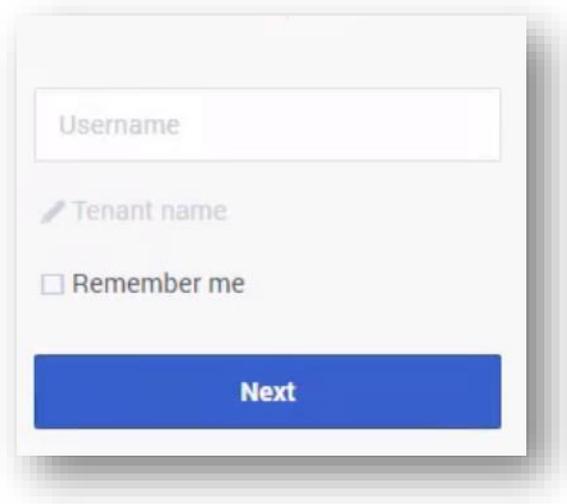
If you access User Terminal (v1) from the Cloud, you launch it by clicking User Terminal (v1) in the Company's Portal.

2.1 Log In

Logging in to User Terminal (v1) is a two-step process.

To log in to User Terminal (v1):

1. Click the User Terminal (v1) icon in Company's Portal, or open a browser and go to the link for User Terminal provided by your supervisor.



The image shows a login form with the following elements:

- A text input field labeled "Username".
- A field labeled "Tenant name" with a pencil icon, indicating it is a dropdown menu.
- A checkbox labeled "Remember me".
- A blue button labeled "Next".

Figure 1: Login page



Note: User Terminal (v1) does not support multiple simultaneous logins from the same user account in different browsers or browser tabs.

1. In the **Username** text box, enter your Username.
2. Click Tenant name to reveal the Tenant field, enter the Tenant name.
3. Click Next.

A login form with three main sections highlighted by red boxes. The first section contains a text box with the username 'cspence' and a cursor. The second section contains a text box with a slash icon and the placeholder text 'Tenant name'. The third section contains a checkbox labeled 'Remember me' and a blue button labeled 'Next'. To the right of the form are three red circles containing the numbers 1, 2, and 3, corresponding to the highlighted sections.

4. In the **Password** text box, enter the password and click **Sign in** to log in to the application.

A password field with a red border containing a cursor and a 'Sign in' button below it. A hand icon is pointing at the button. To the right is a red circle containing the number 4.

Figure 2: Sign in

5. When User Terminal (v1) loads, you will be taken to the main view.

The main view interface features a navigation menu on the left with icons for user profile, notifications, chat, and calendar. The main content area has a tabbed interface with tabs for 'My Channels', 'My History', 'My Workbins', 'My Campaigns', 'Contact Directory', and 'Interaction Sear...'. The 'My Channels' tab is active, displaying a table with columns for 'Media', 'Status', and 'Information'.

Media	Status	Information
outboundpreview		(00:01)
workitem		(00:01)
chat		(00:01)
email		(00:01)

Figure 3: Main view

2.2 Logging Out (Exit)

To log out of (Exit) User Terminal (v1):

1. Click the **Exit** option from the menu in the upper right-hand corner.

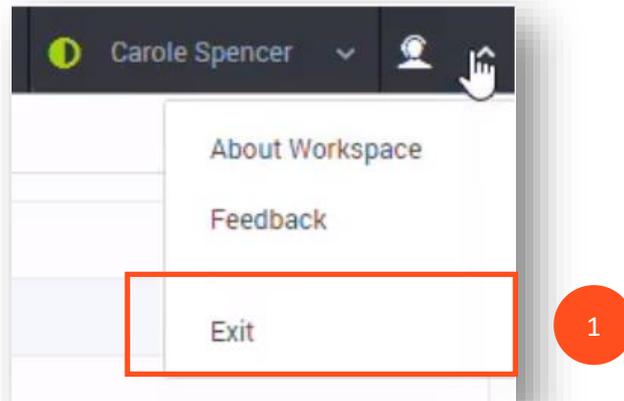


Figure 4: Main menu - Exit

2. In the resulting dialog, click **Exit** to log out of User Terminal (v1).

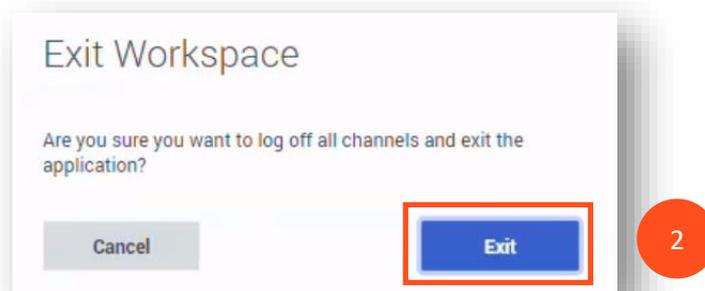


Figure 5: Log out (Exit) dialog



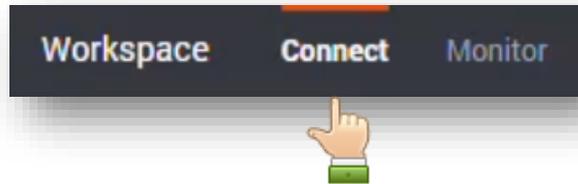
Note: You won't be able to log out if you have any active calls or Digital interactions.

3 Taking your first phone call

To receive calls, you must be in a Ready status (indicated by a green checkmark beside your name).

To start accepting calls in User Terminal (v1):

1. Navigate to **Connect** group.



2. Select the **My Channels** tab, it allows you to set the status of the voice channel.



3. Now, set the voice channel to **ready** and wait for the calls to be directed to your workstation.

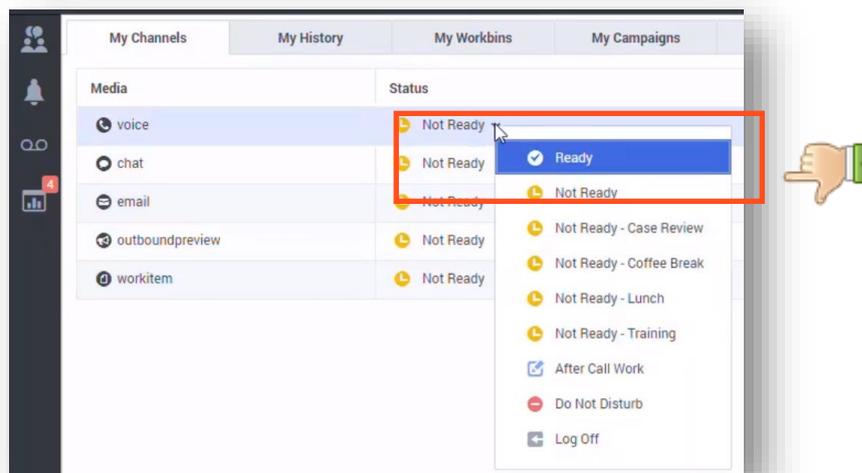


Figure 6: My Channel tab

4. When a call is directed to you, a notification appears at the right-hand side bottom of the User Terminal (v1) area.
5. Click **Accept** to accept the call.

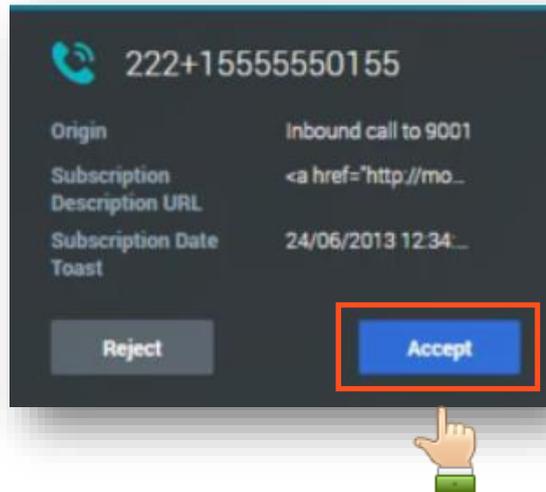


Figure 7: Incoming call notification

6. You are now connected to the caller (customer). During the call you can view the call details by expanding the view, the call area includes the information about the call.

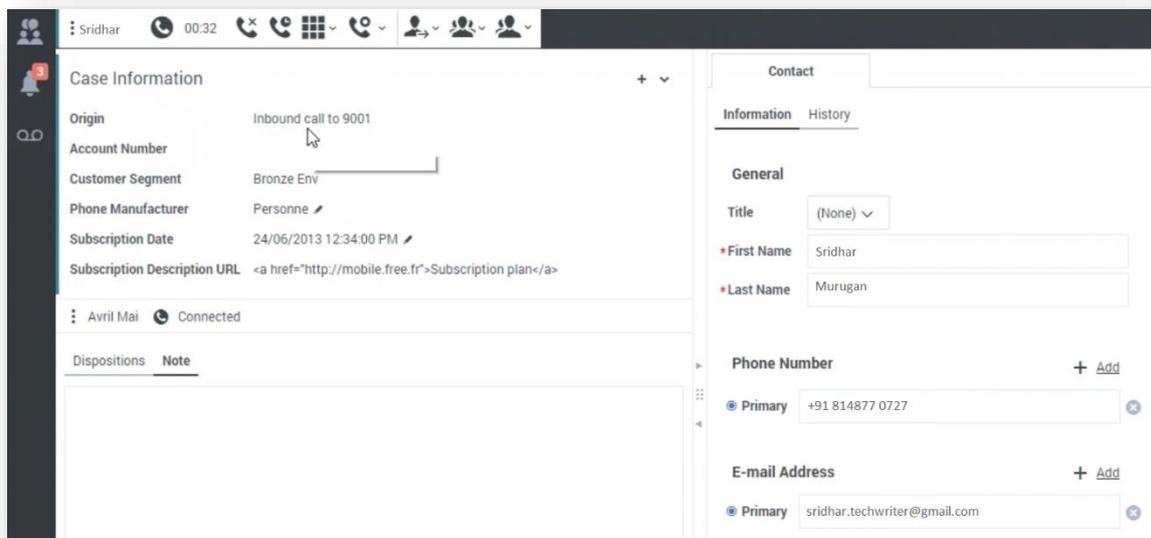


Figure 8: Case information view

7. When you are finished talking. Click **End call** to close the call.



Figure 9: End call

8. Add notes in the **Note** section pertaining to the call.

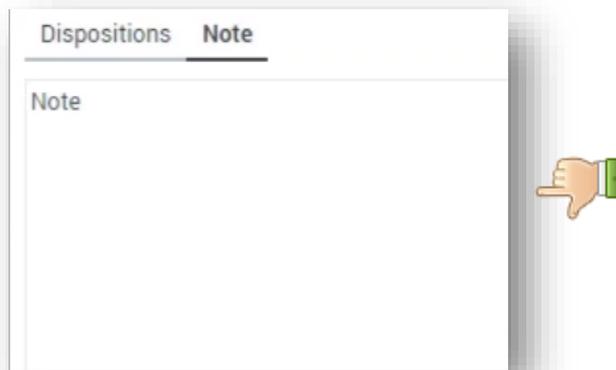


Figure 10: Note section

9. Click **Mark Done** when you are finished.

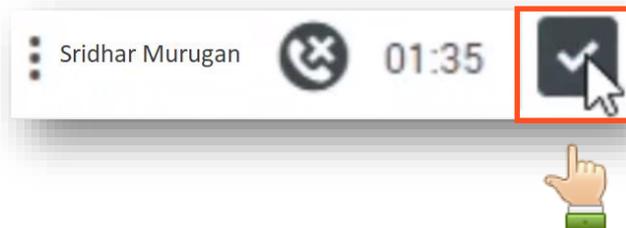


Figure 11: Mark Done

4. Good to know

This section helps you to understand the important icons and their function of User Terminal (v1).

4.1 Table of status icons

Table showing the status icons that you might see while using User Terminal (v1).

User Terminal icon	User Terminal status
	State unknown
	Logged out
	Ready/Ready with Action Code
	Partially Ready
	Not Ready/Not Ready with Action Code
	(Not Ready) After Call Work
	Do Not Disturb (DND)
	Out of Service

4.2 Table of call handling icons

Table showing the call handling icons that you might see while using User Terminal (v1).

Call handling icon	Call handling feature
	Hold
	Resume
	Transfer
	Hang up
	Mark Done
	Conference
	Record
	Consult

A photograph of a library with rows of bookshelves filled with books. Several incandescent light bulbs are hanging from the ceiling, casting a warm, yellowish glow. The scene is slightly blurred, creating a soft, atmospheric effect. A semi-transparent dark rectangle is overlaid in the center, containing the text 'THANK YOU' in white, uppercase letters.

THANK
YOU