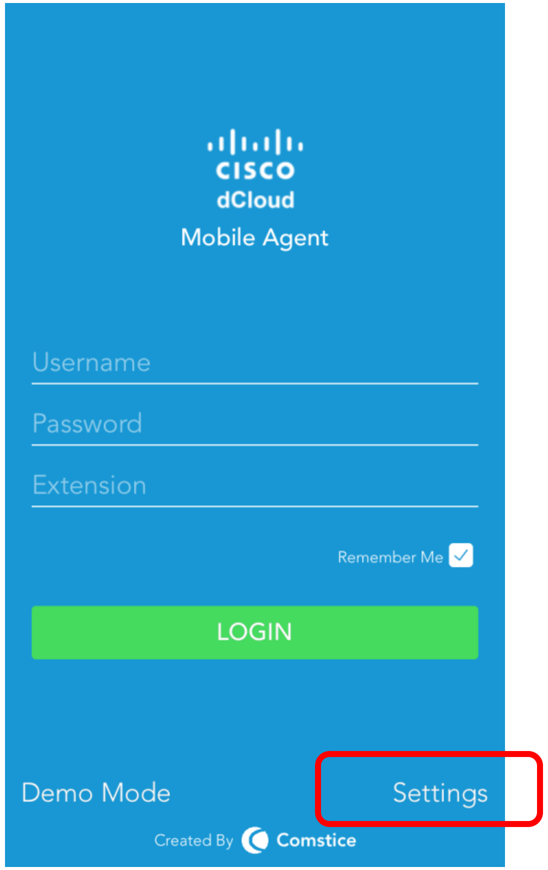
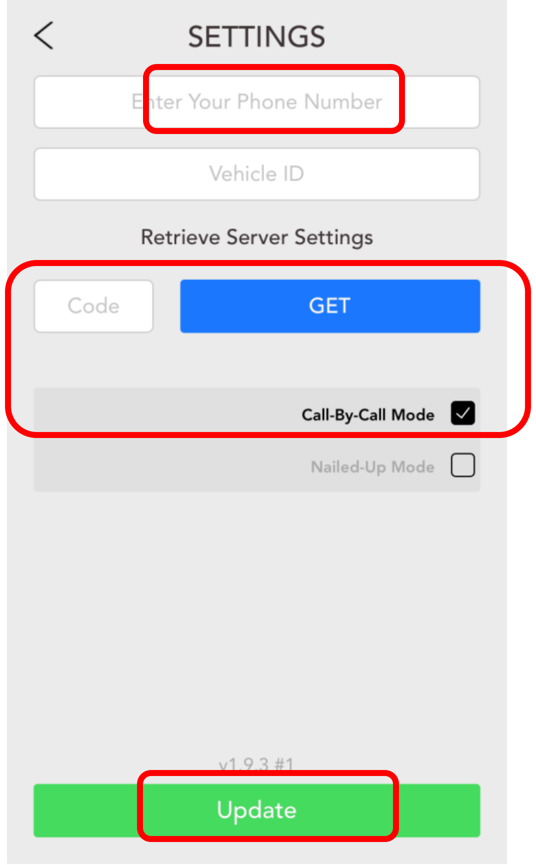
Mobile Agent User Guide

Comstice

Retrieve License

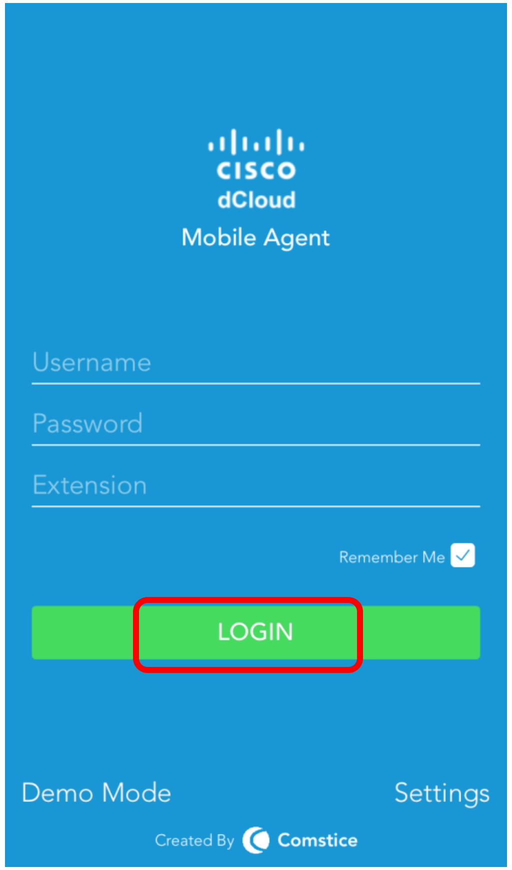
- Download "Comstice Mobile Agent" app and launch
- Go to Settings by tapping on bottom right
- Enter phone number in the format your call center can dial out
- Enter company code(3 letter, 3 digit code) in small letters and tap on GET
- Tap on UPDATE

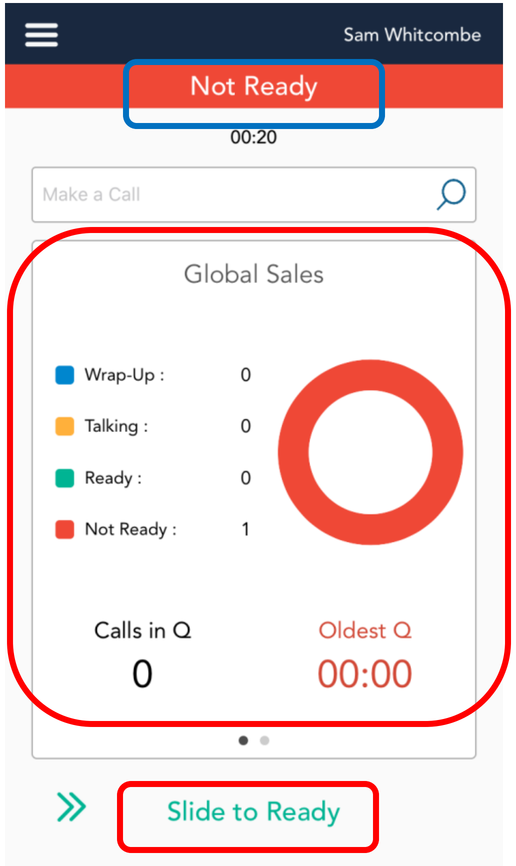




Login

- You should see your company colors and the logo in the login page
- Login using your existing agentID, password and mobile extension
- You should see the logged in page with agent state, team state and queue information
- If you are a member of multiple teams, you can slide left or right for the other teams' stats.





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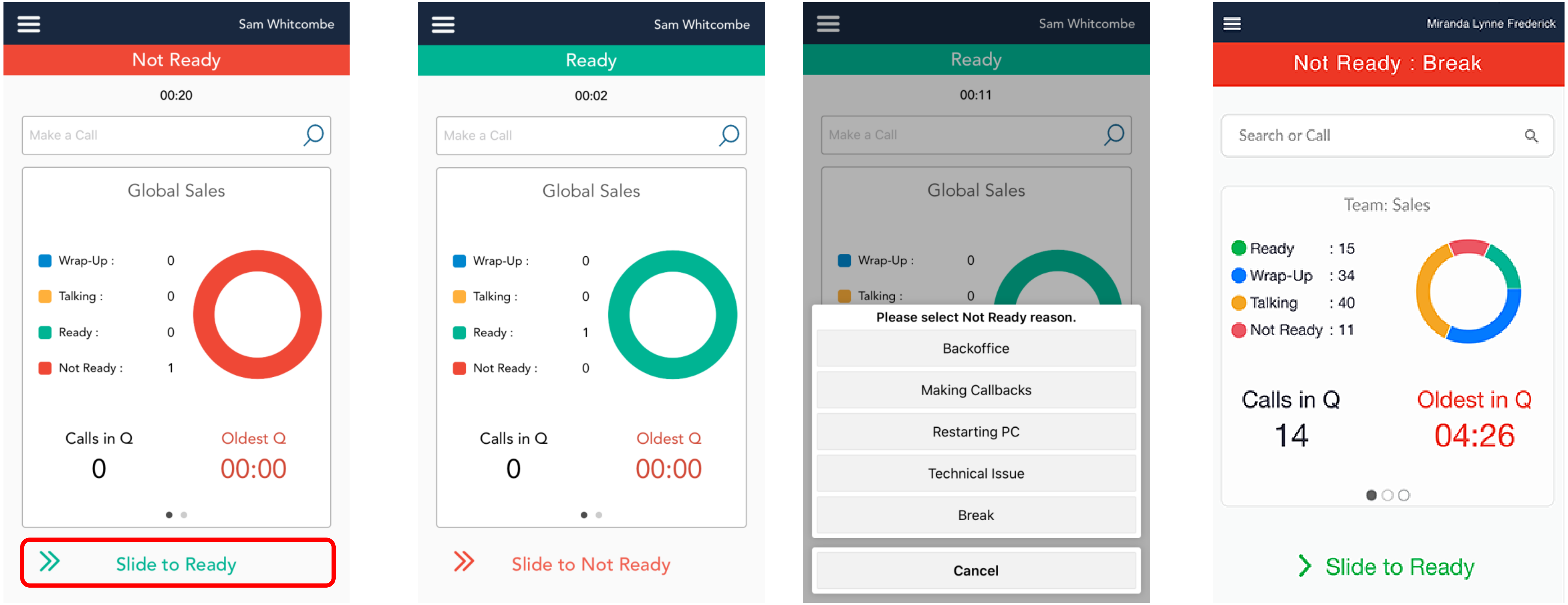
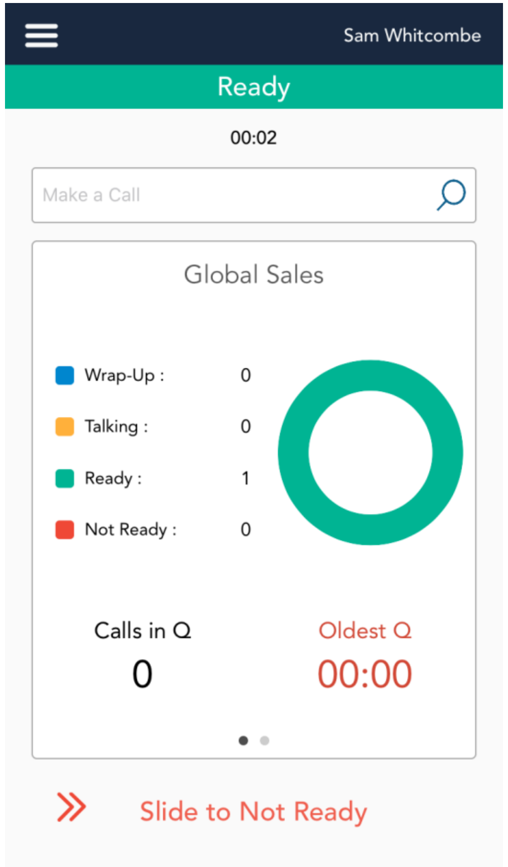
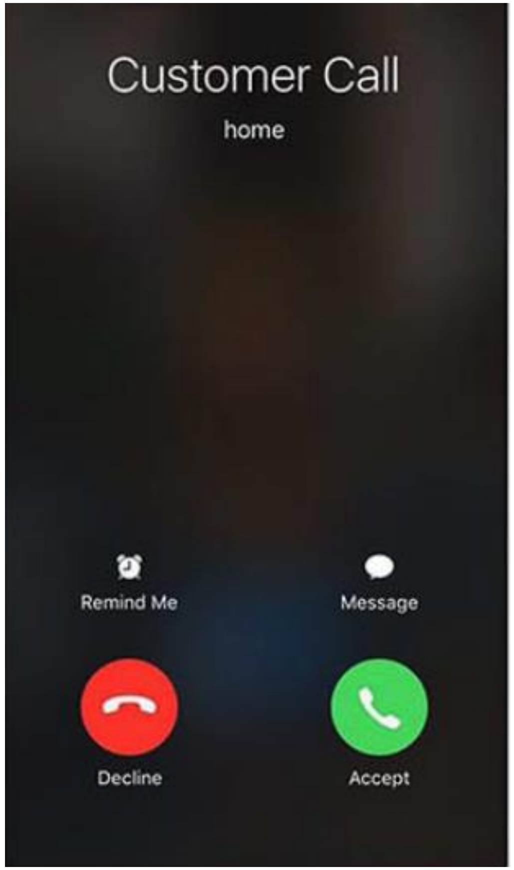
Go to Ready and Not Ready

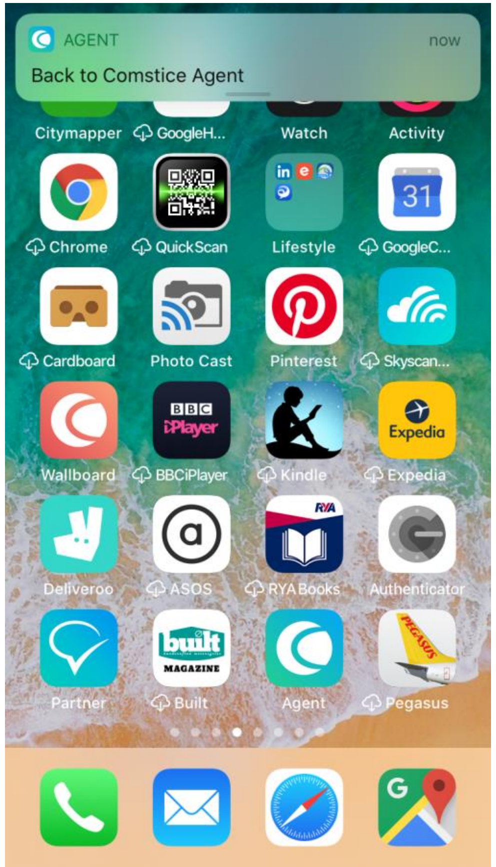


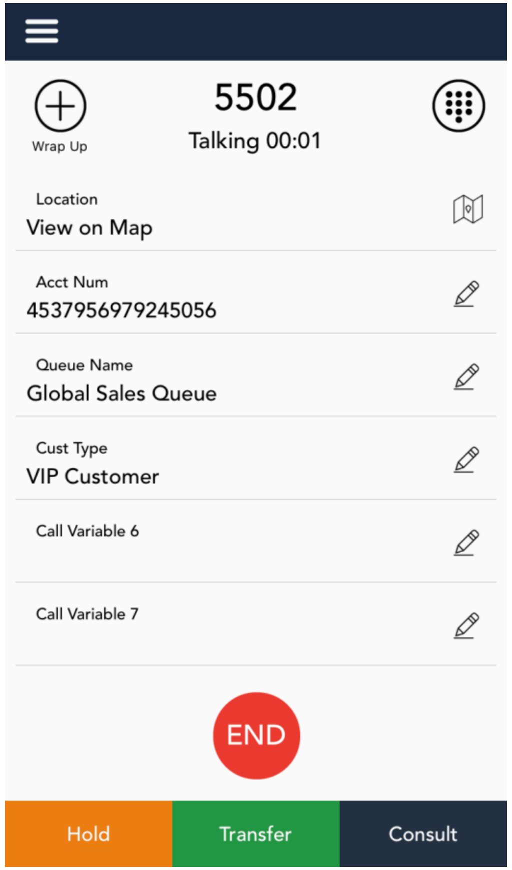
- Slide from left to right at the bottom to go to Ready state
- You can also slide to go to Not Ready. In that case you will have options to select reason codes.

Go to Ready and Receive Calls









- Slide to Ready. If there are calls in queue, you can receive customer calls from the phone line you entered
- First call information will be populated in the app. Then call will arrive.
- You will receive mobile notification to go back to Comstice Mobile app

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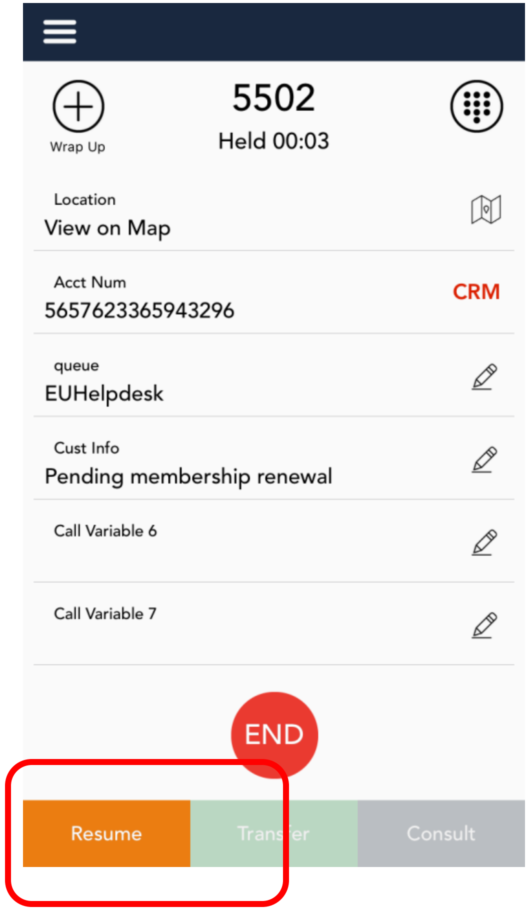
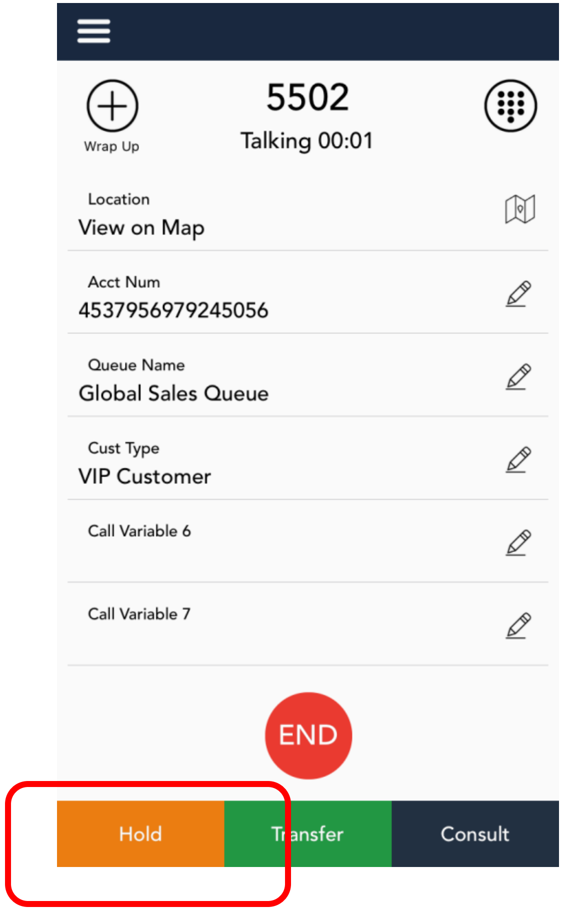
Hold and Resume

- You don't need to put the caller on hold, system holds the caller when you click on consult.
- While on an active call, tap on hold, then tap on resume to go back to the caller.
- If you need to consult transfer or conference the caller with a third person, you can just tap on Consult. No need to put the caller on hold.





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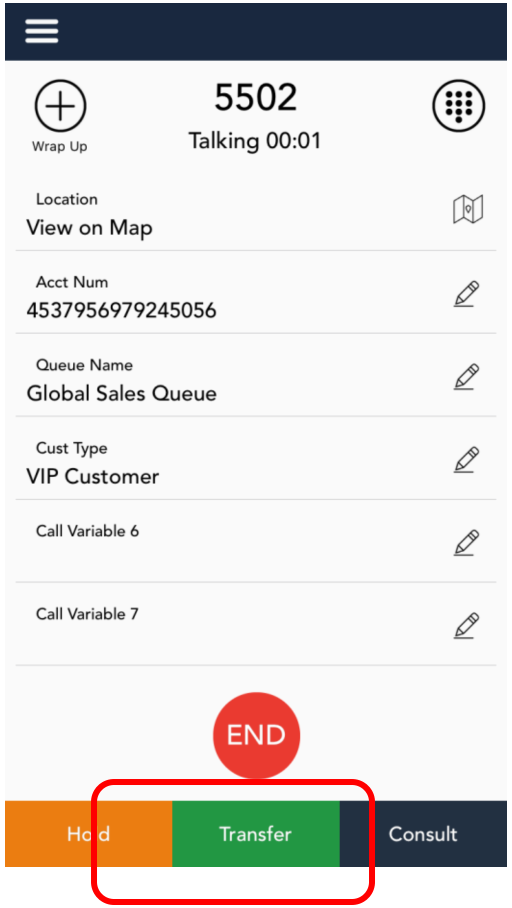
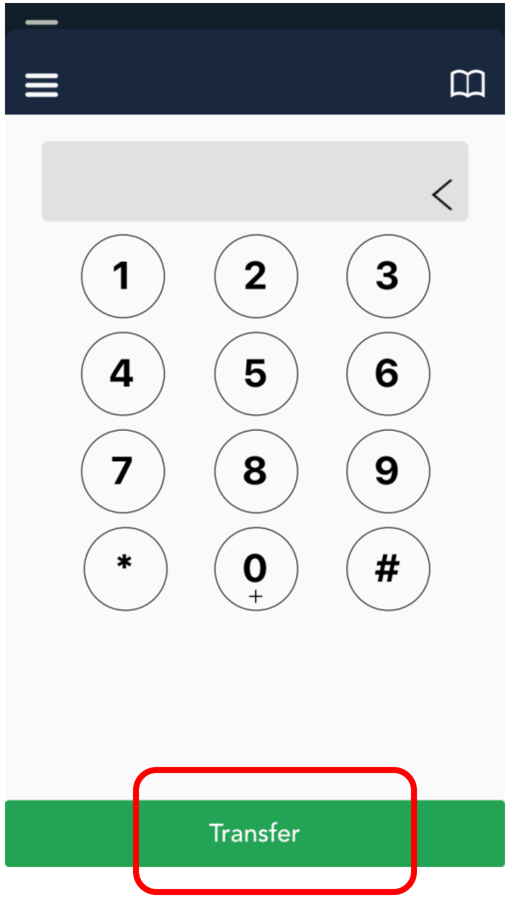
Single Step Transfer

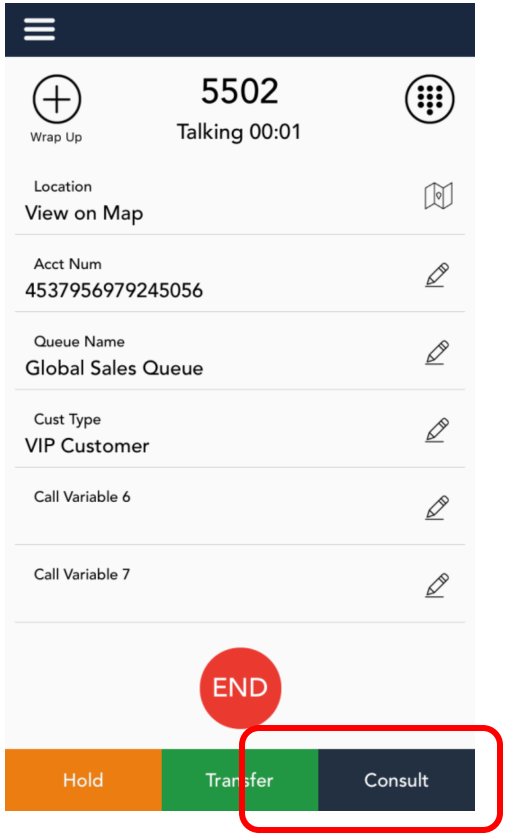
- You can transfer the call to internal extension or external number with single step transfer easily
- While on an active call, tap on Transfer, type the destination number and tap on Transfer again. The call will be sent to the destination immediately.

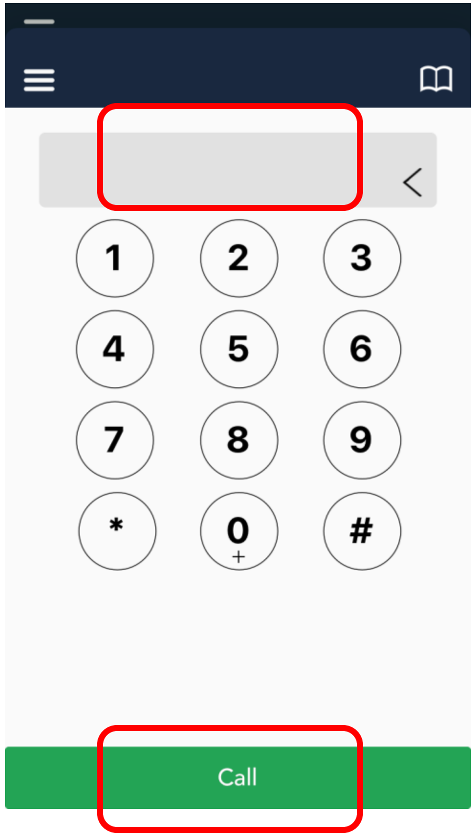


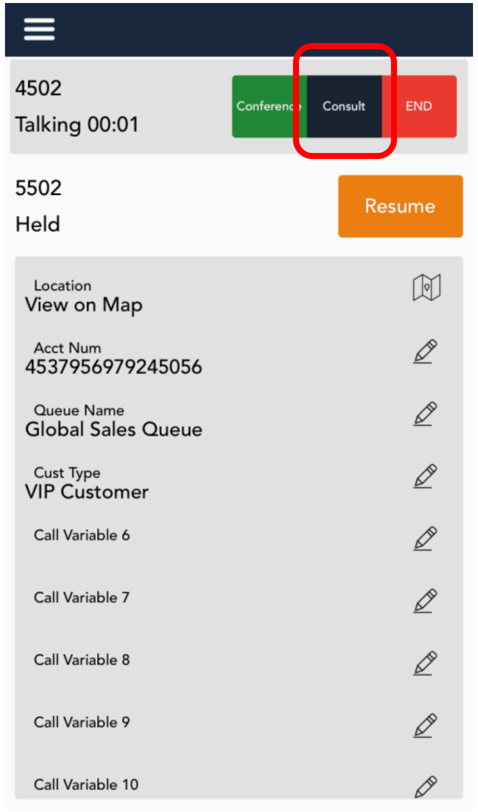


Consult Transfer

- While on an active call, tap on Consult, type the destination number and tap on Call.
- This will put the first call on hold and make a second call.
- Agent can switch between the calls, terminate the calls individually, transfer or conference the calls
- Tap on Consult on the second call to complete the consult transfer.







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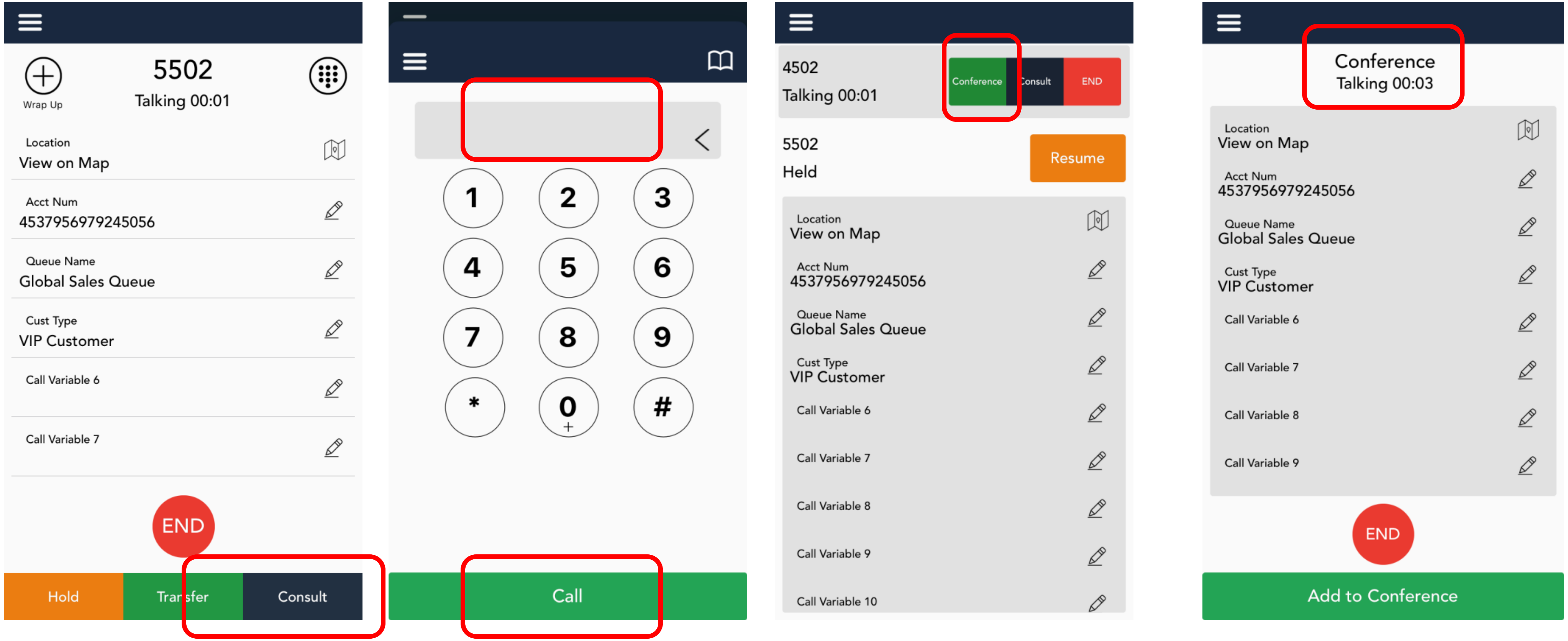
Conference



- While on an active call, tap on Consult, type the destination number and tap on Call. When you are ready, you can tap on Conference and 3-way conference will begin.

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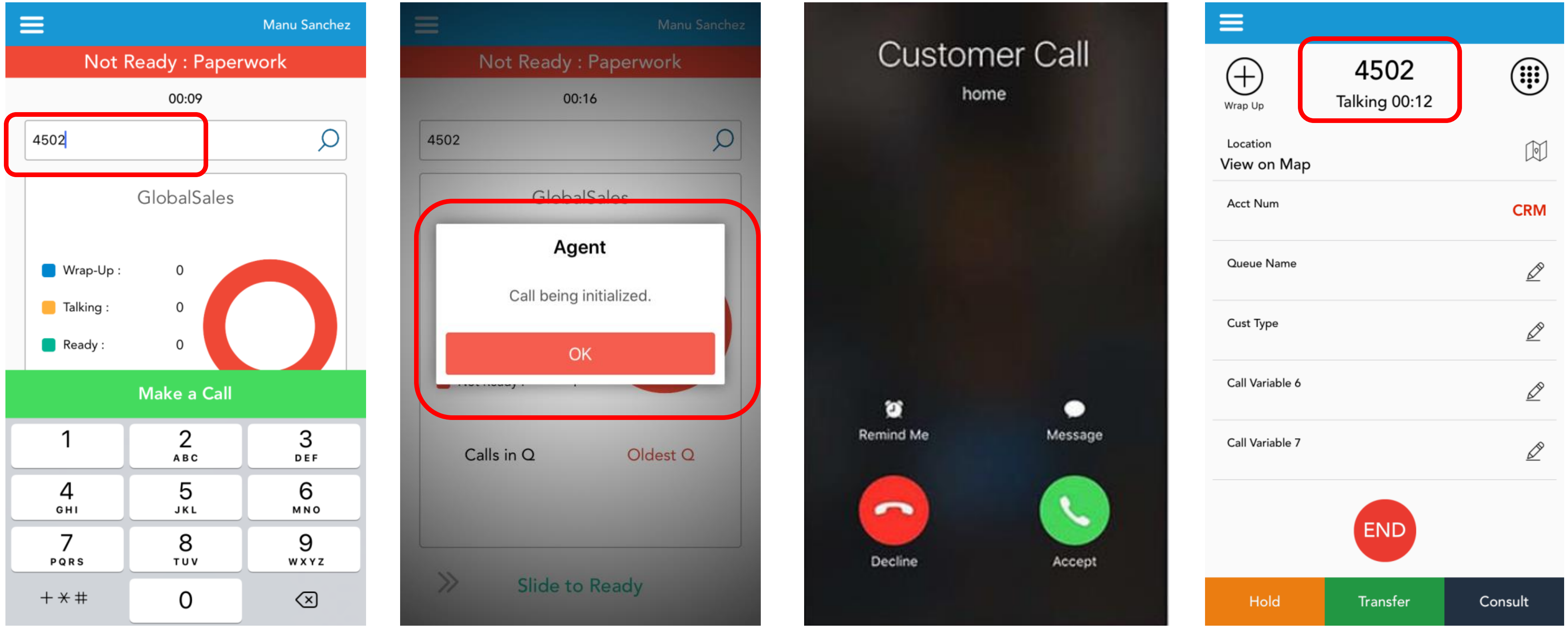
Making a Call



- Agent can also generate a call to internal or external number. She will in fact receive a call with the destination number she typed on the other end of the line.

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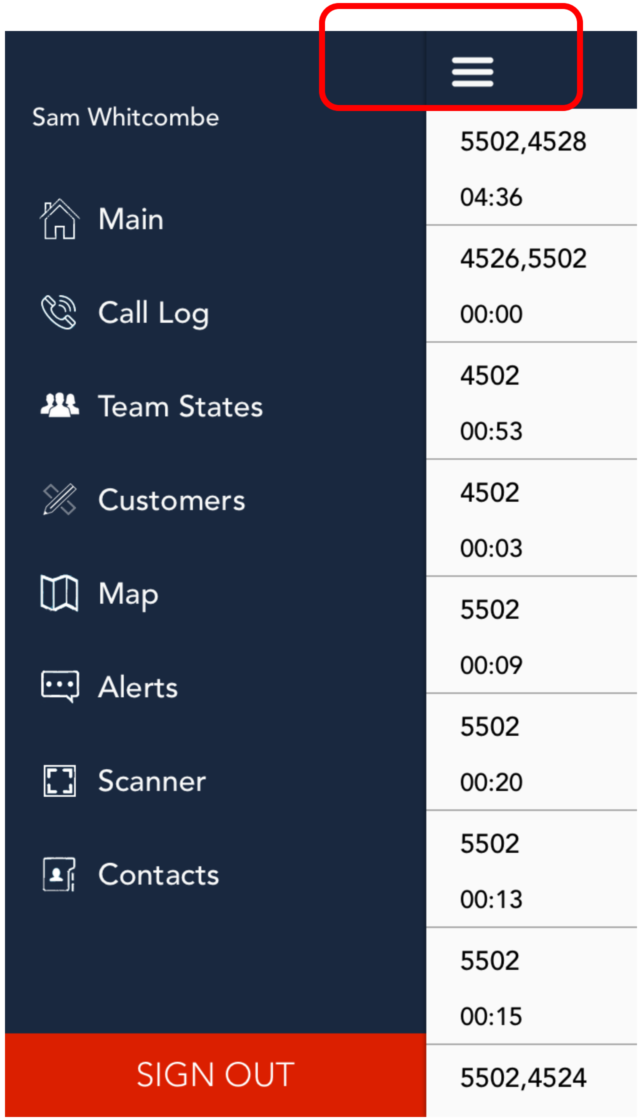
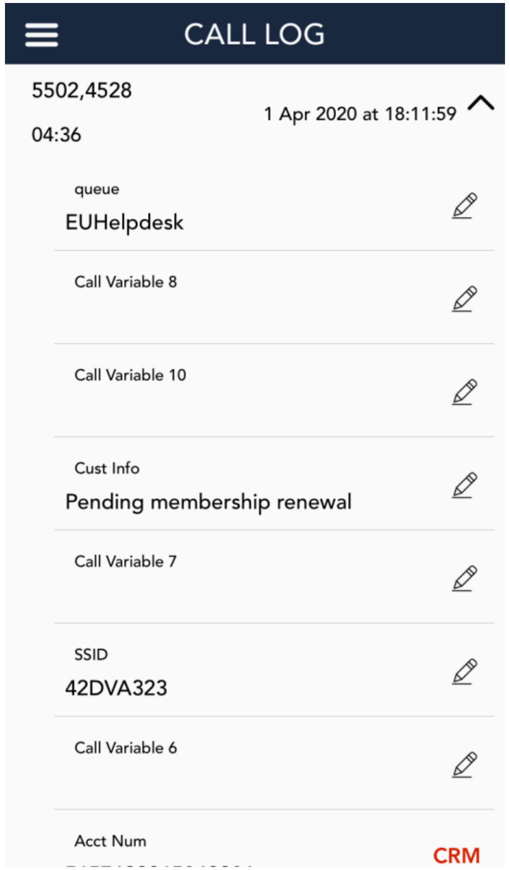
Menu Options

- You can tap on the left top Menu icon to navigate inside the app.
- Tap again to close the side menu



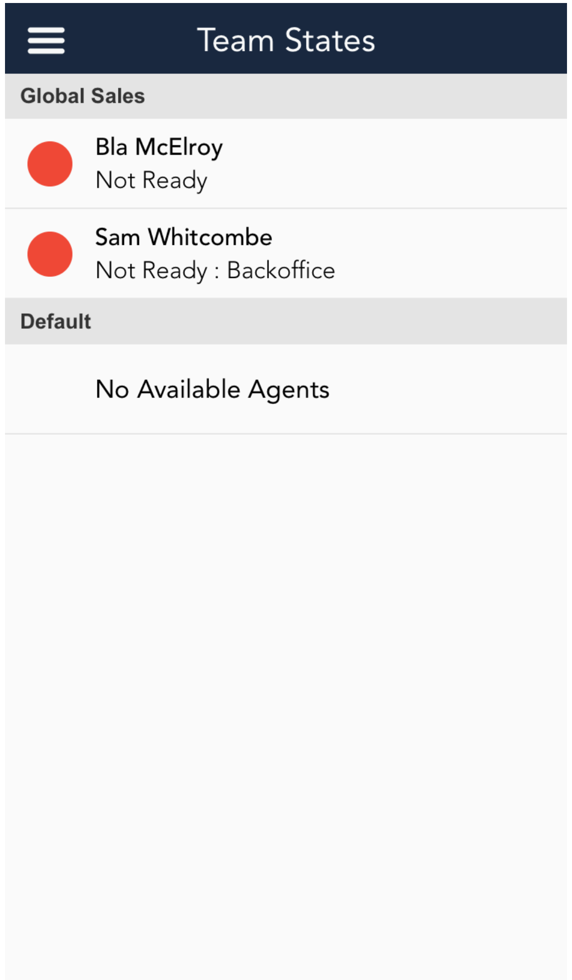
Call Logs

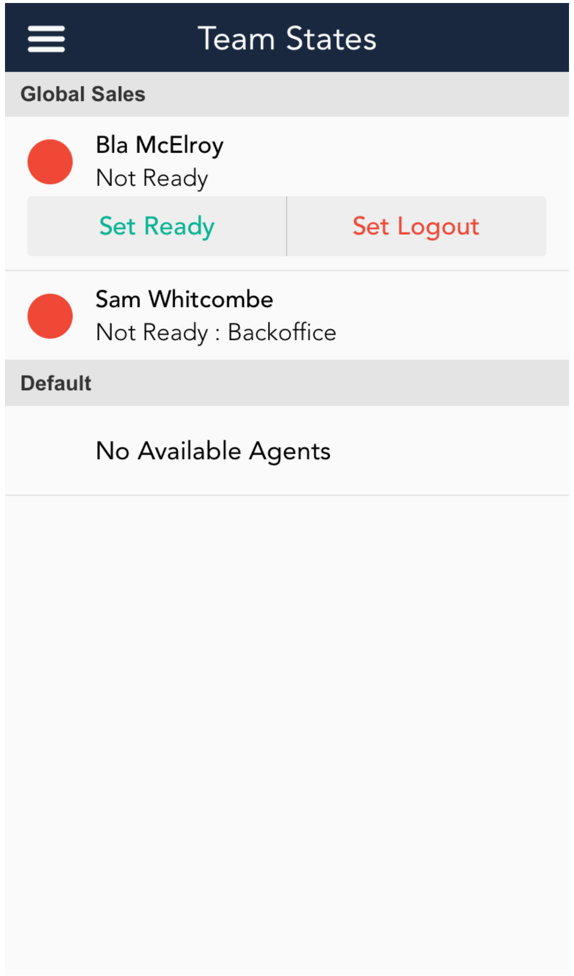
- Agent can access to the call logs from the side menu
- They can tap on each call to see the details of the call variables for the ACD calls.
- From here, it is possible to access CRM details of the customer after the call as well as the location information on the map.



Team States

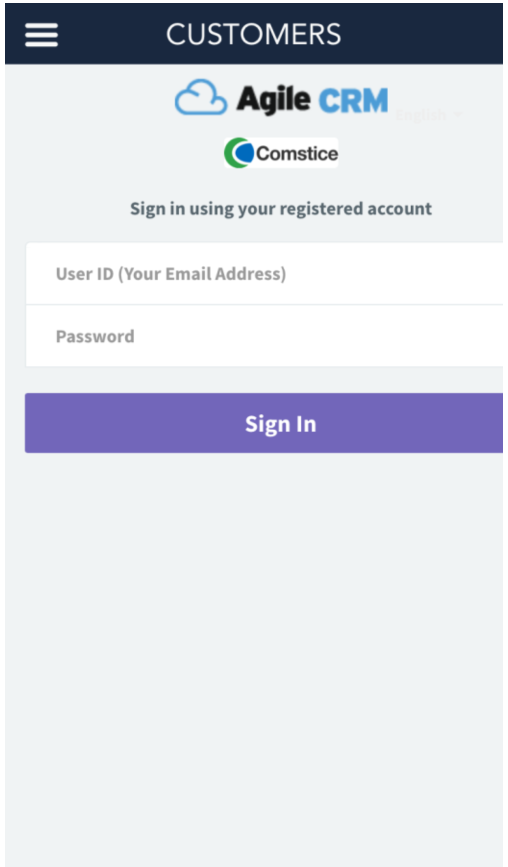
- Team members can monitor the states and reason codes of the team members from Team States section.
- If agent has Supervisor rights, she can also change the state of the team members, set them to Ready or Not Ready.





Customers

- Customers section is a built-in browser pointing to your backoffice and customer ticket applications. Any CRM or ticketing service can be pointed to here.
- When a call comes in, app can also show the CRM page of the caller automatically. This feature is set on the company code.



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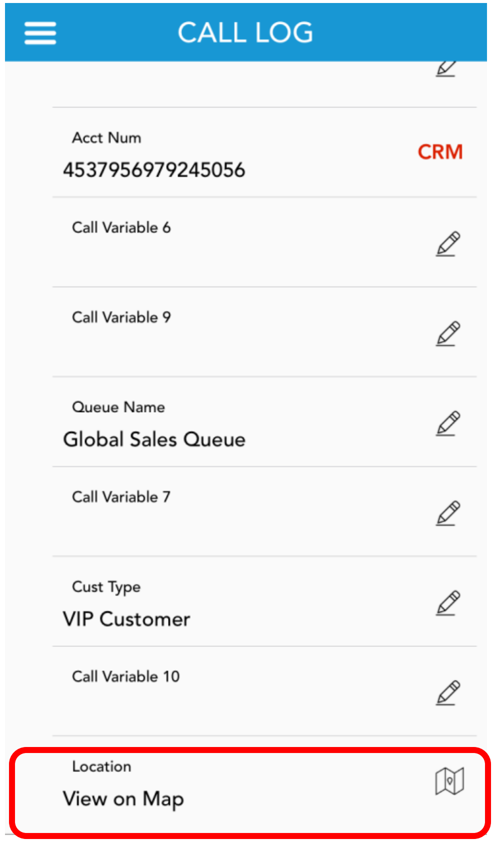
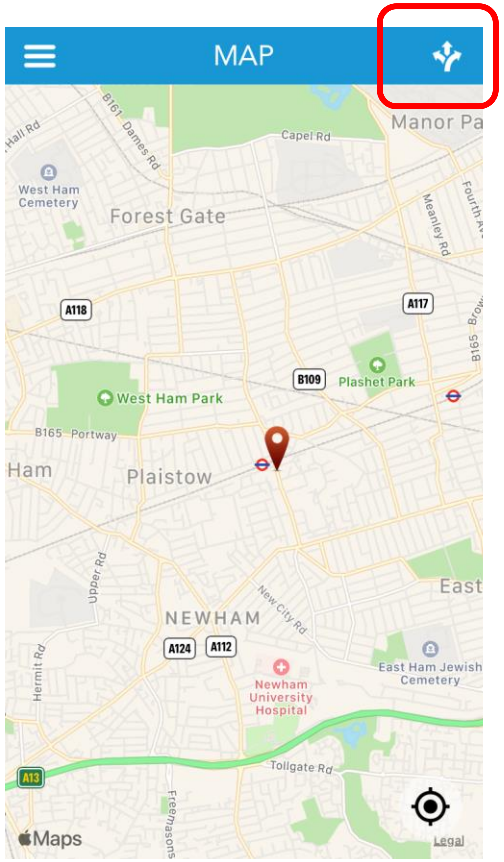
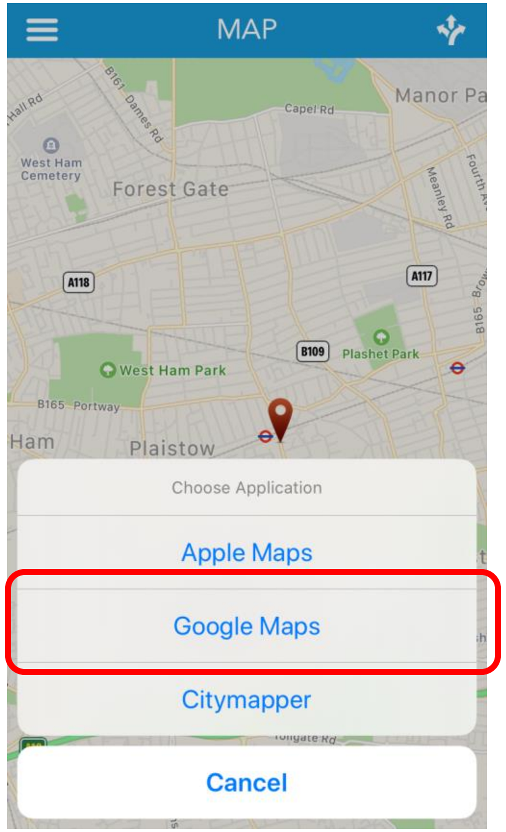
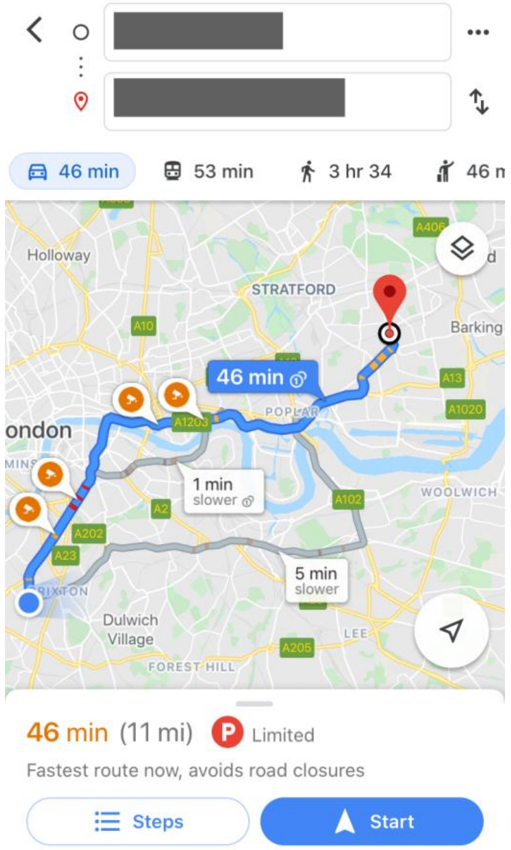
Map









- Map feature helps mobile agents to launch customer location in the map and get directions from their mobile map app
- On the call variables from Call Logs or during active call, tap on "View on the Map" and customer's location will be pinpointed on the map
- If you need to drive to the customer, you can tap on Directions icon on top right corner.
- App will ask you preferred maps app installed on your device.
- You can select your favourite map app and find the route to the customer

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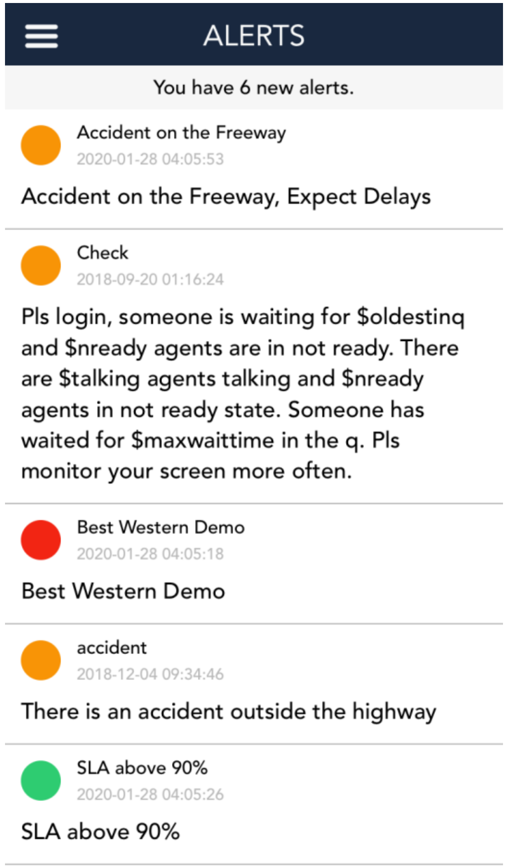
Alerts

- Alerts are the messages sent by the team leaders
- Each alert is shared with the team members
- Each alert has severity level 1, 2, or 3 which will color-vode the message
- Alerts also have expiry date and will not be displayed after that date



Scanner and Signature Pad

- Agents can scan the barcode and update the details on their CRM platform
- Signature pad also helps to retrieve customer signature when the on-site work is complete. This will also be pushed into the CRM.

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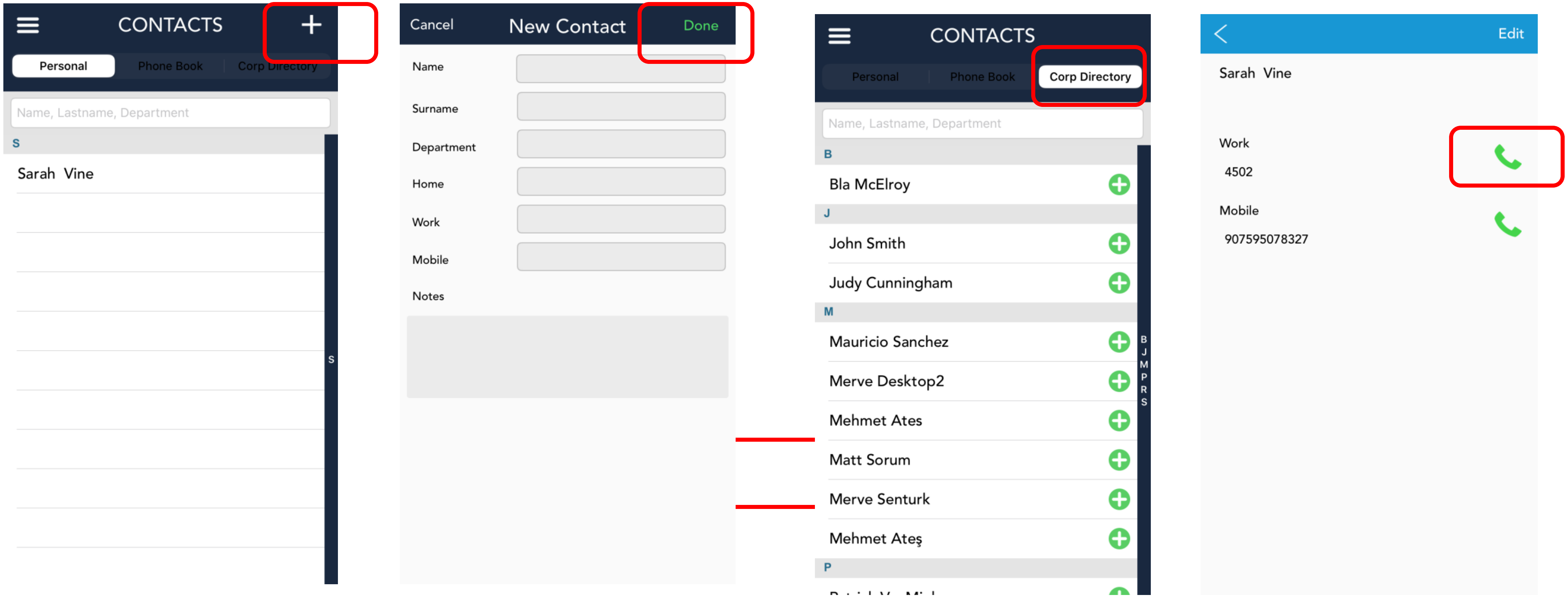
Contacts



- Contacts section offers Personal Contacts List as well as access to Finesse Contacts and Cisco CUCM Corprate Driectory and Active Directory contacts
- Comstice Mobile Agent uses Cisco CUCM dial plan, therefore internal and external contacts can be called.
- Contacts are also accessible from Transfer and Consult screens in the app.

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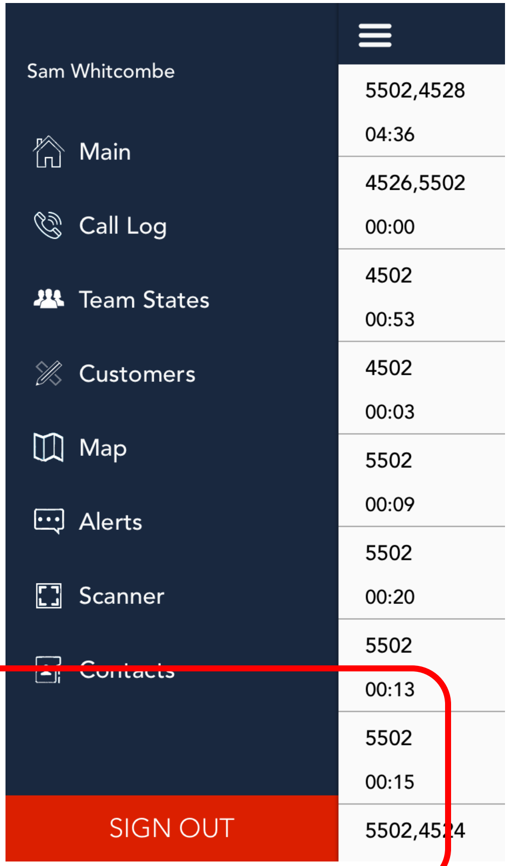
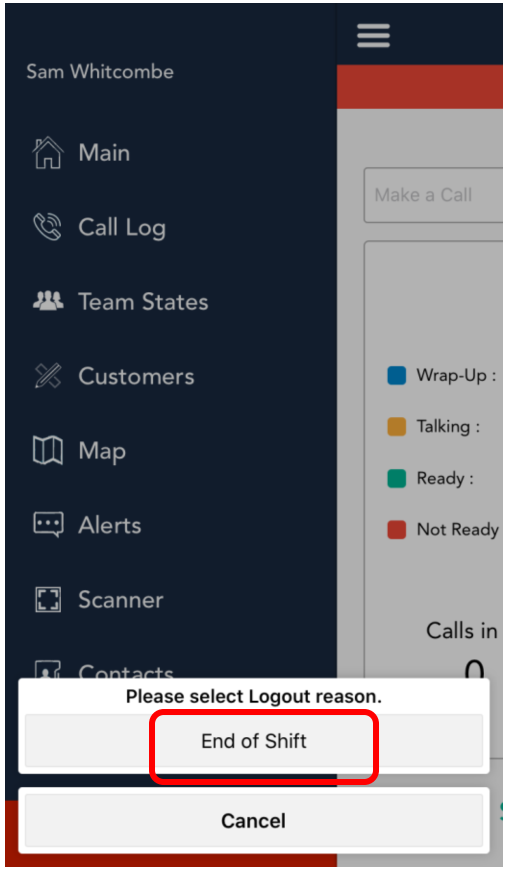
Logout

- You need to go to Not Ready state first to logout
- From the side menu, tap on sign out, select the reason code and you will be logged out.
- Unless you are manually logged out, system will show you logged in. If the app was crashed or any other issues, you can login and manually log out





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