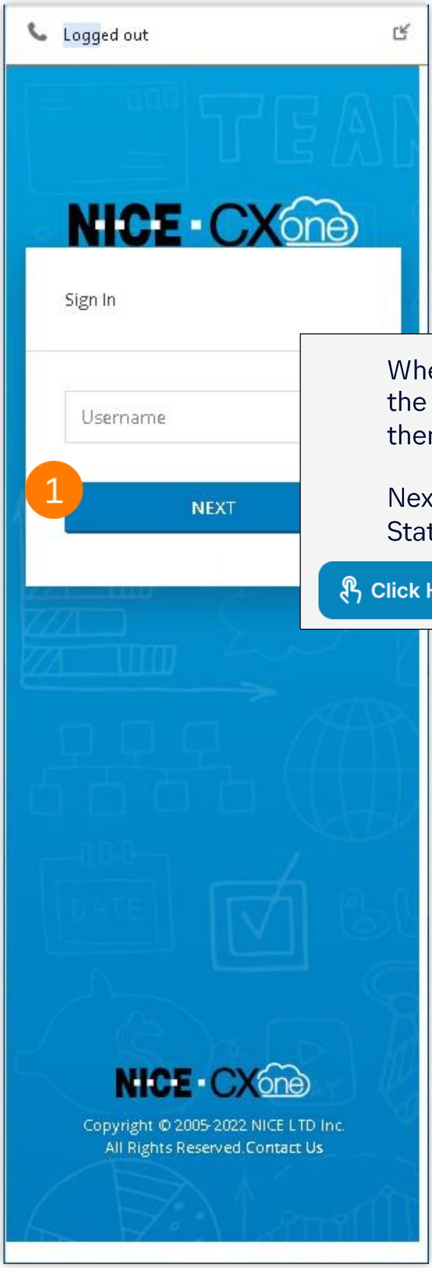
Salesforce Agent – Classic in Lightning Interactive Quick Guide

Instructions

Use this Interactive Quick Guide to explore the basics of the Salesforce Agent – Lightning & Classic.

1. Use **Click Here to See It** and other links to explore various functions and screens.
2. Use **Go Back and Explore More** to return to the previous selection.

Logging In – Username

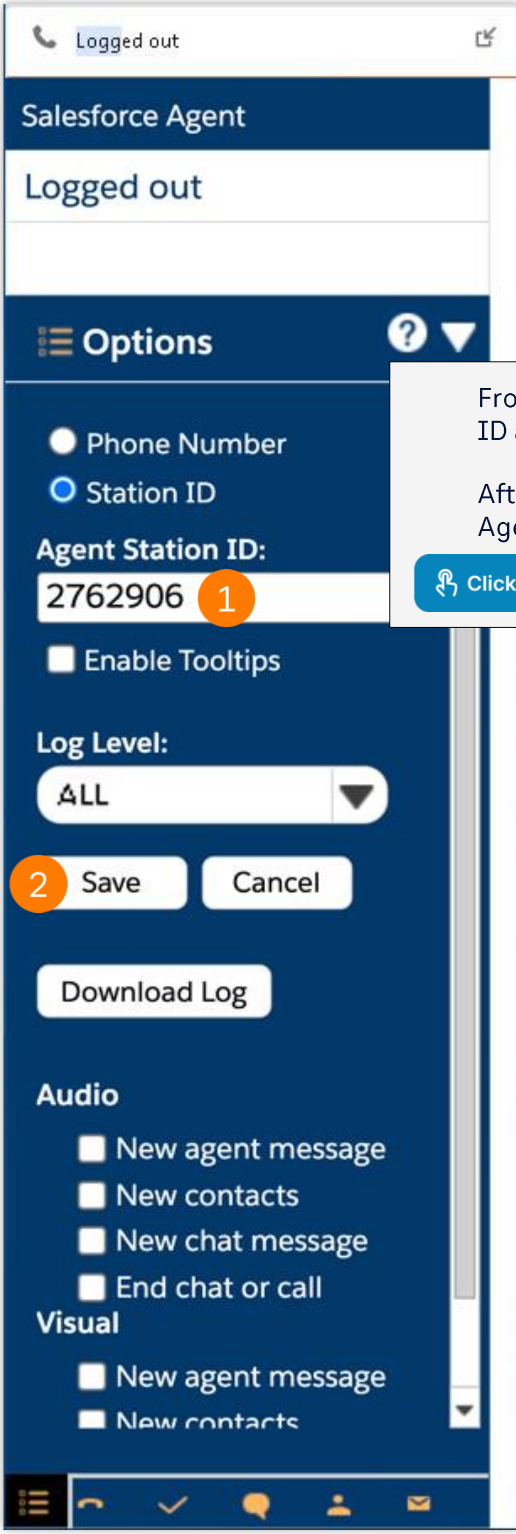


When starting your day, first access the Agent tool from Salesforce and then enter your Username.

Next you need to enter/verify your Station ID.

Click Here to See It

Logging In – Station ID

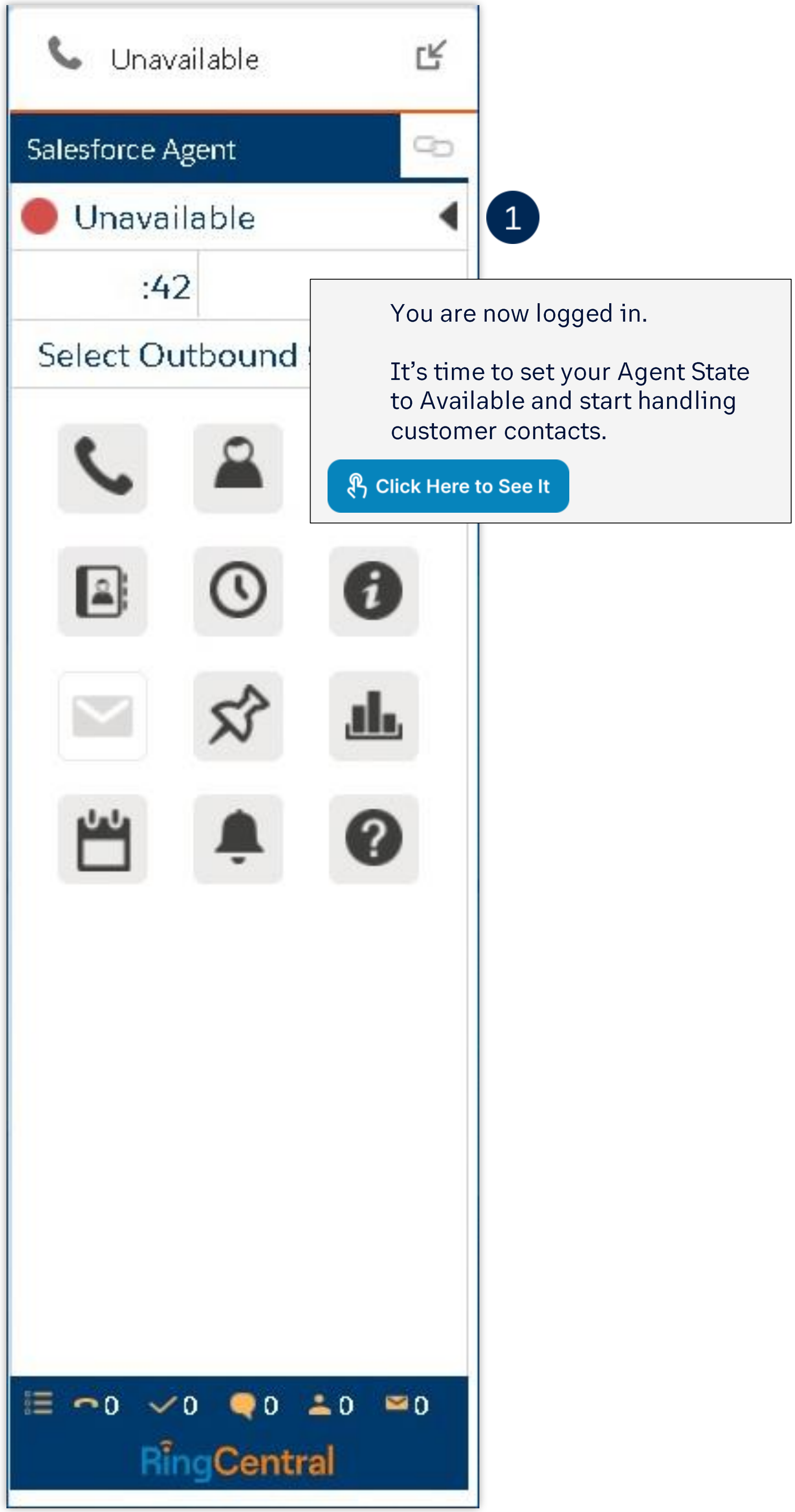


From here, enter or verify your Station ID and select **Save**.

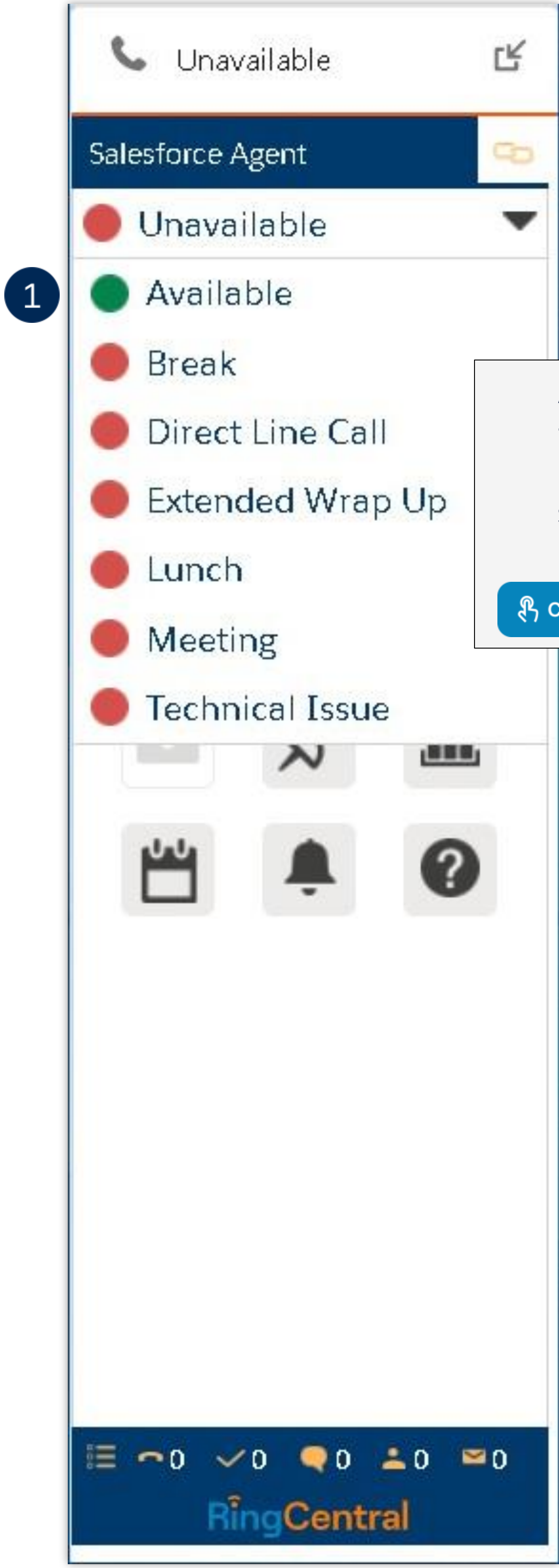
After this, you are logged into the Agent tool.

Click Here to See It

Initial Log In (Unavailable)



Agent States

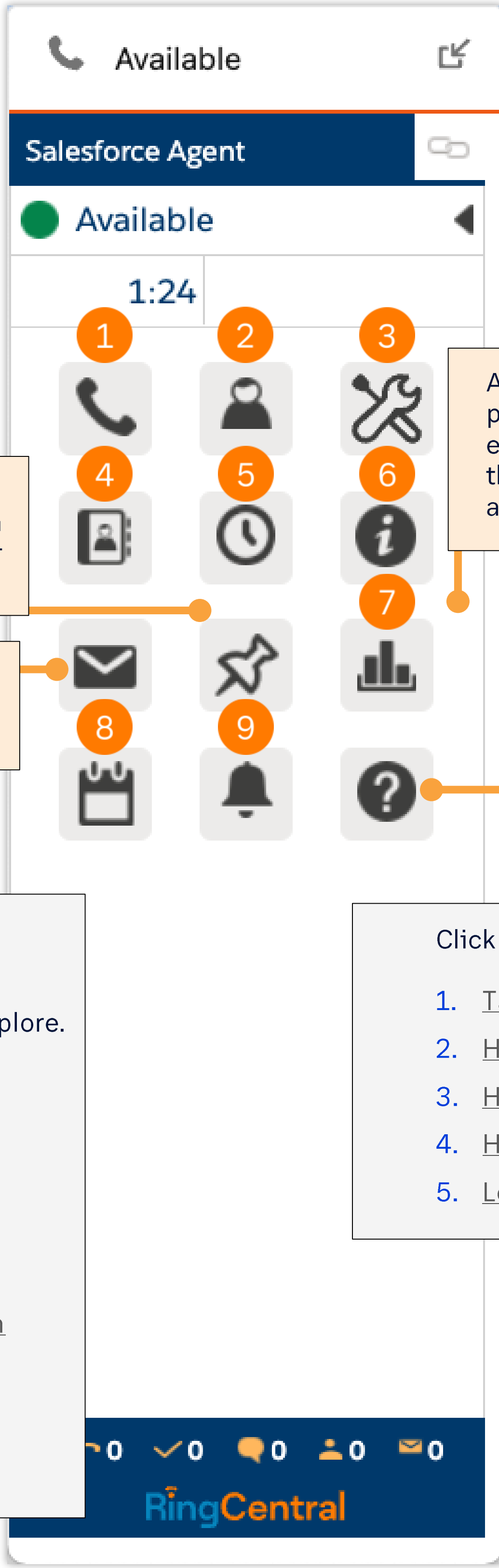


Agent States indicate if you are available for customer contacts or why you are unavailable.

Select **Available** to handle customer contacts.

Click Here to See It

Available (Ready for Contacts)



As contacts, such as phone calls or emails, come to you, their information appears in this area.

Click the pin icon to create a commitment or callback.

Click the email icon to initiate an Outbound Email.

Click this icon to open the support and help site.

You are now ready for customer contacts.

Select something to explore.

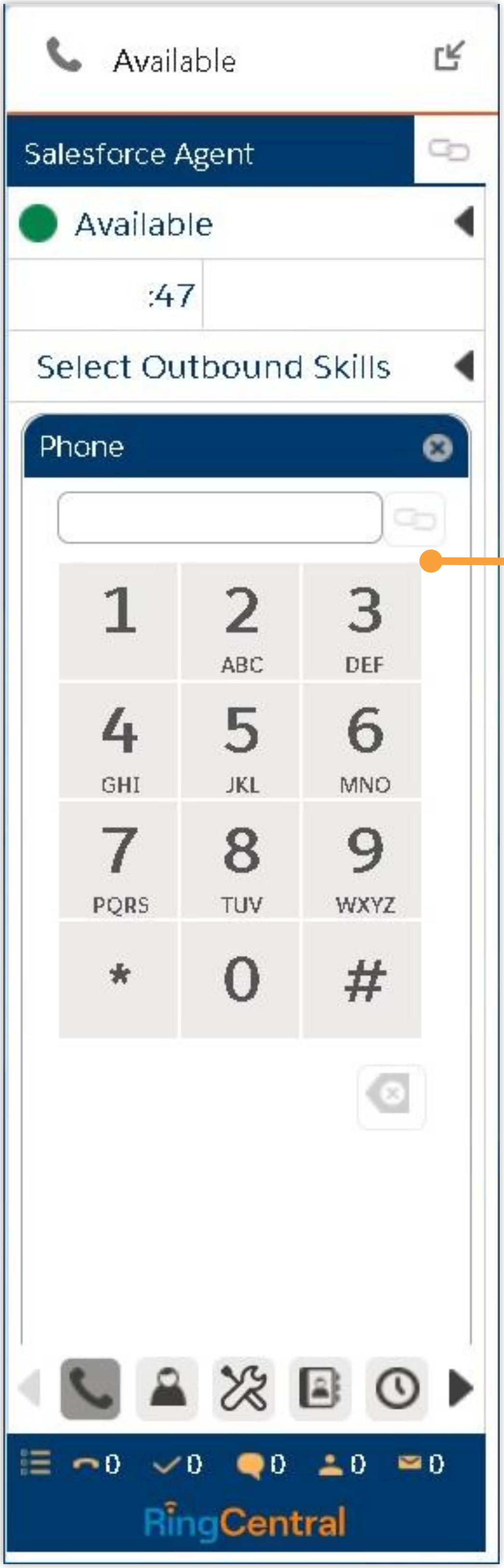
1. Dial Pad
2. Agent Directory
3. Skills
4. Address Book
5. Contact History
6. Agent Information
7. Agent Reports
8. Schedule
9. Messages

Click to explore how to:

1. Take inbound calls
2. Handle emails
3. Handle chats
4. Handle voicemails
5. Logging out

Dial Pad for Outbound Calls

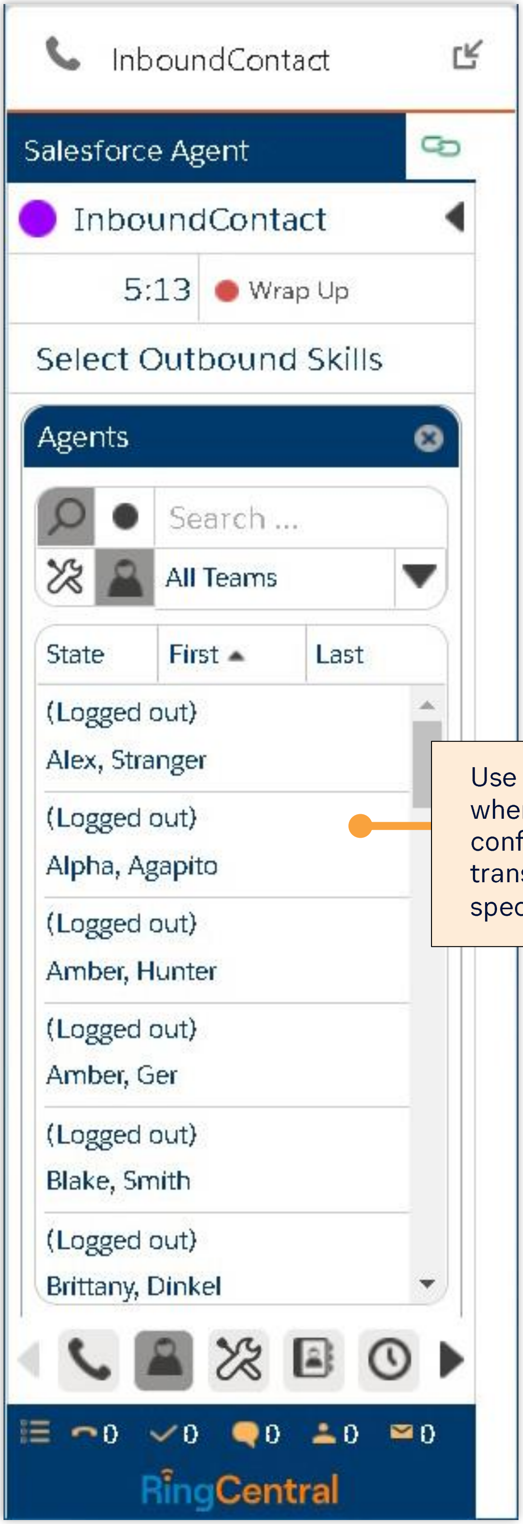
Go Back and Explore More



For manually dialed calls, use the **Dial Pad** to enter the number and the **chain icon** to make the call.

Agent Directory

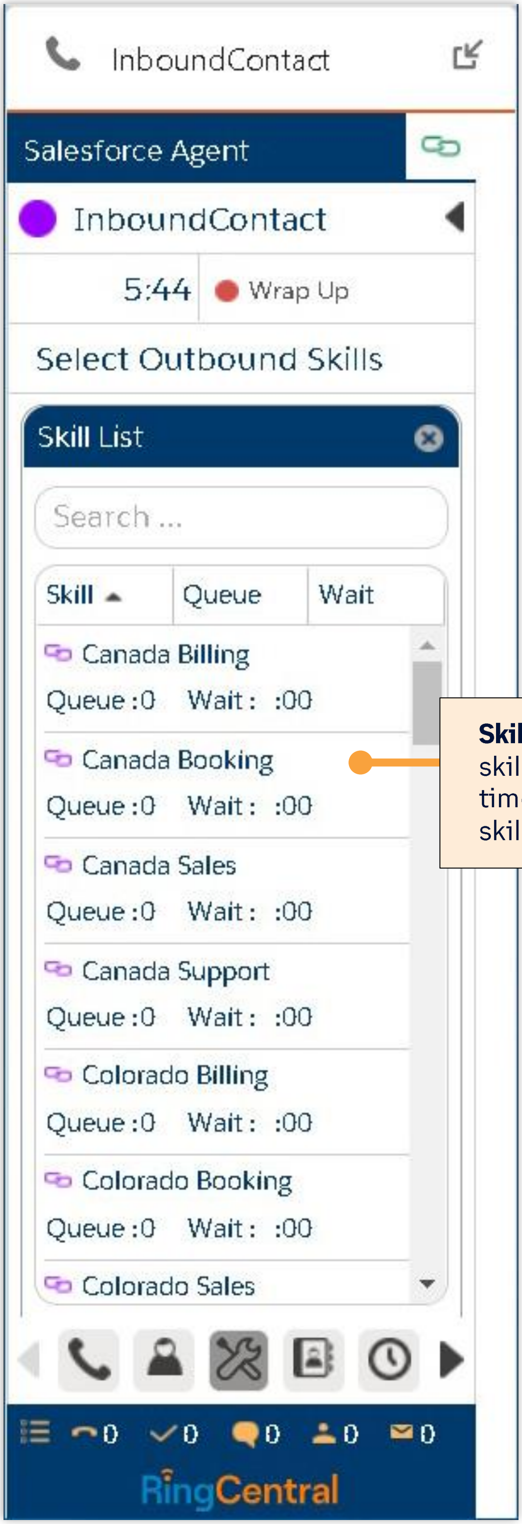
Go Back and Explore More



Use the **Agent Directory** when you need to conference in or transfer a contact to a specific agent.

Skills

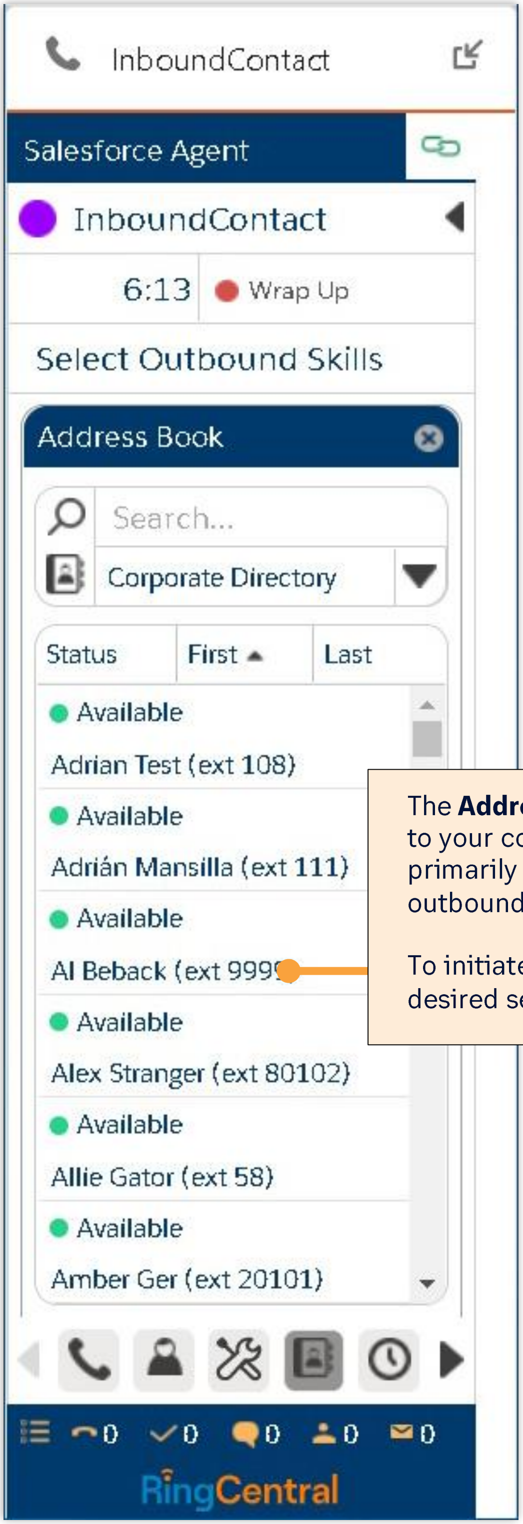
Go Back and Explore More



Skills displays the skills, queues, and wait times of your assigned skills.

Address Book

Go Back and Explore More

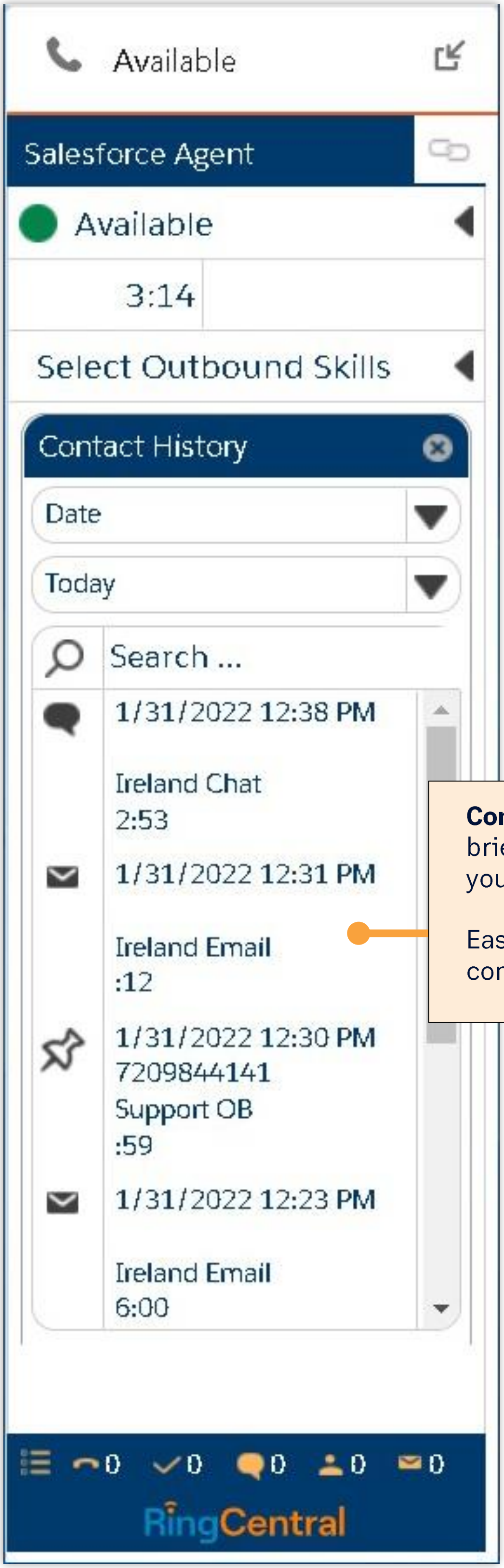


The **Address Book** provides access to your corporate directory and is primarily used for transfers and outbound contacts.

To initiate a contact, click the desired selection.

Contact History

Go Back and Explore More

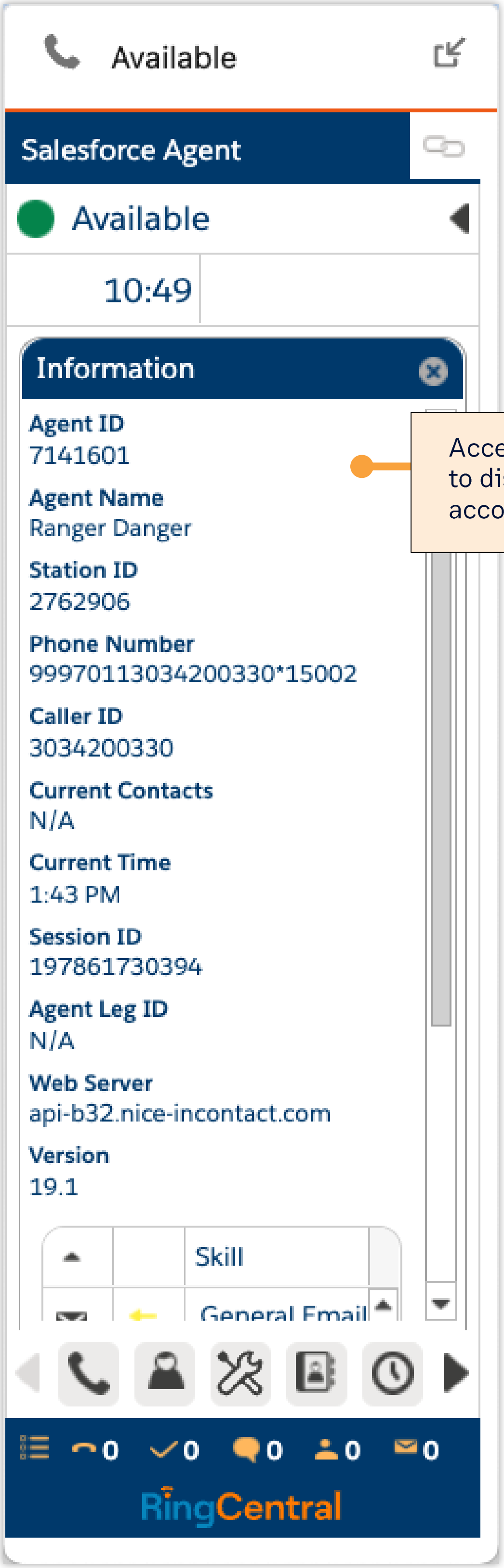


Contact History displays a brief history of contacts that you've handled.

Easily re-connect with any contact by clicking on it.

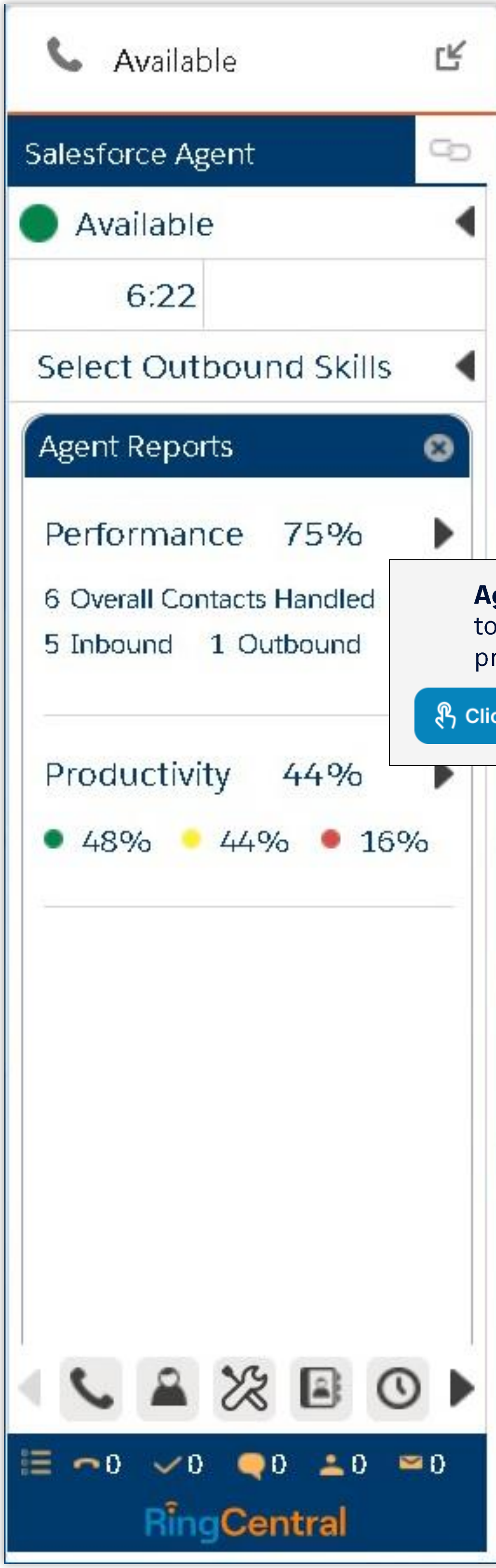
Agent Information

Go Back and Explore More



Access **Agent Information** to display your basic account information.

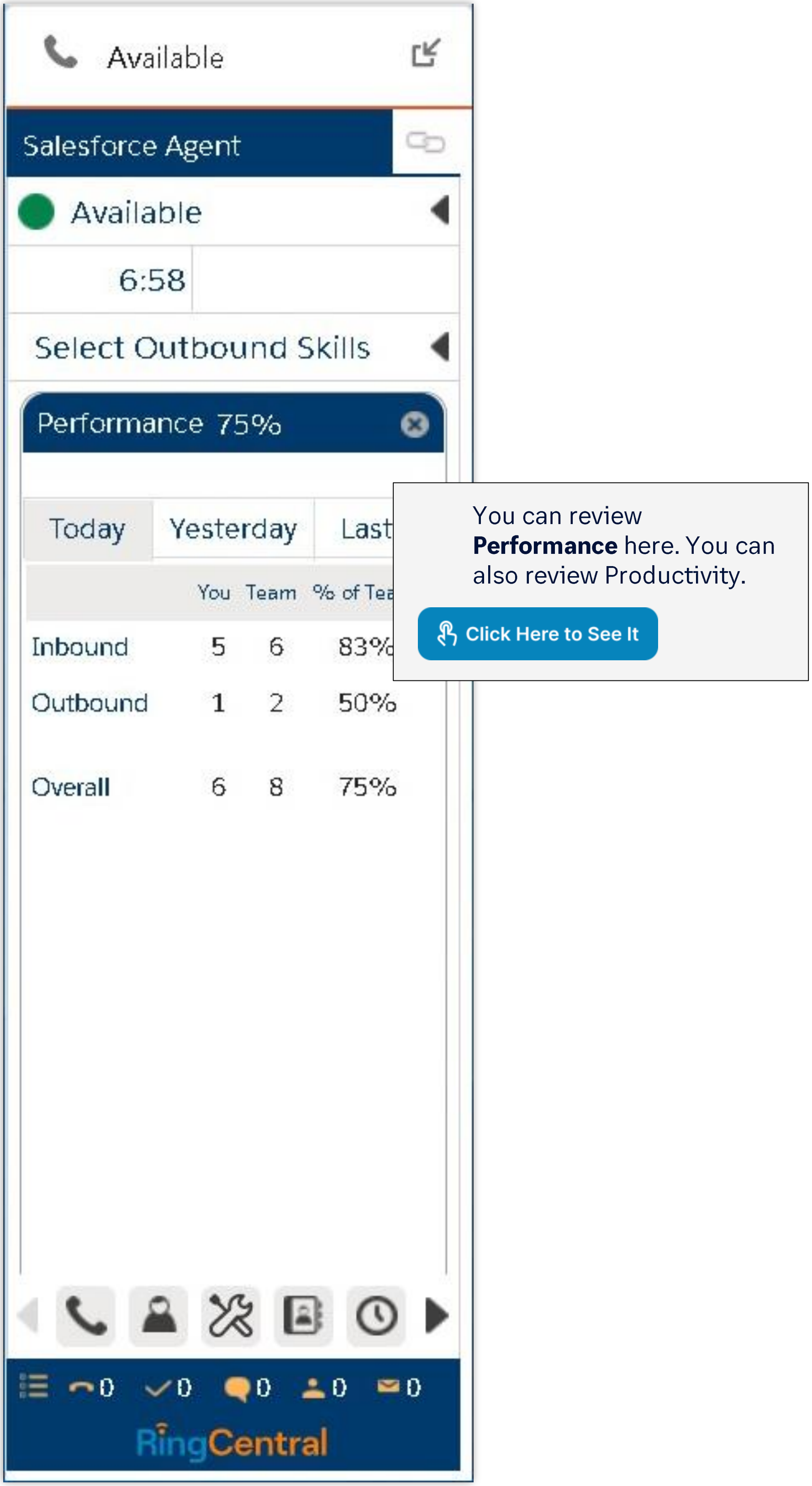
Agent Reports



Agent Reports provides access to basic performance and productivity information.

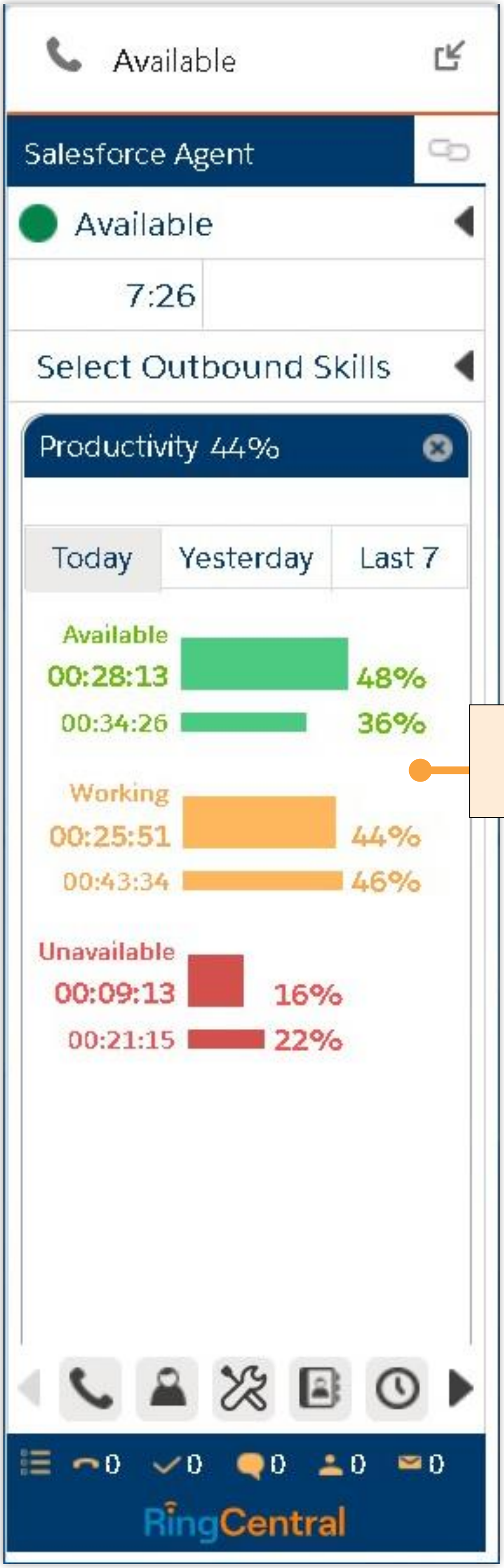
Click Here to See It

Agent Performance



Agent Productivity

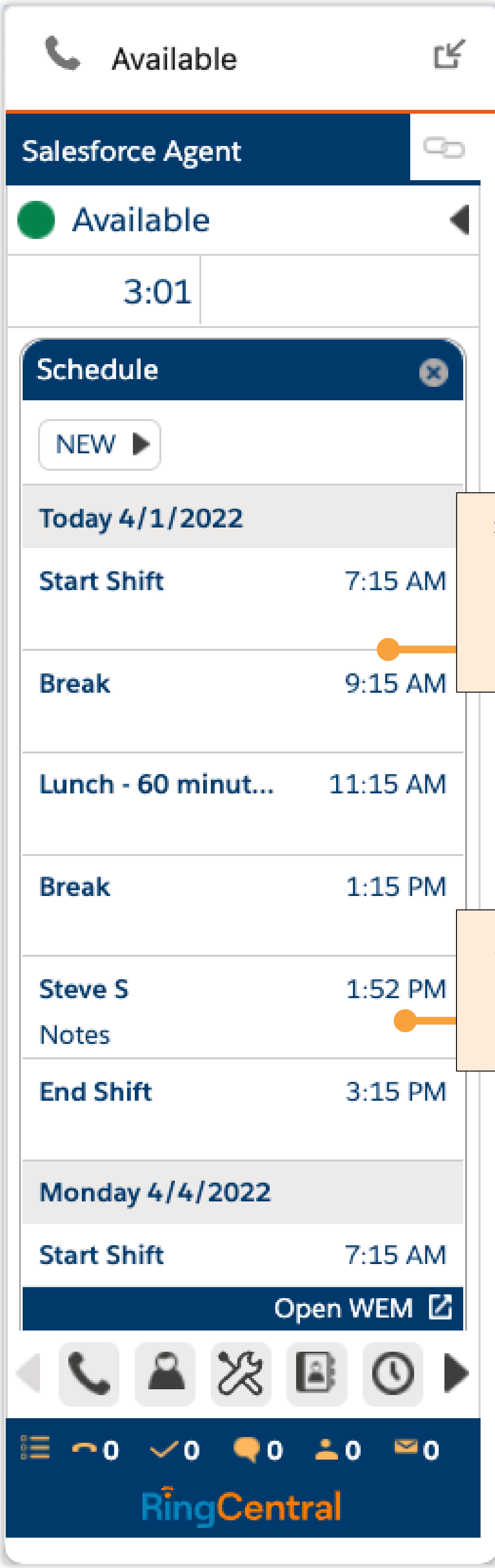
Go Back and Explore More



You can review **Productivity** here.

Schedule

Go Back and Explore More

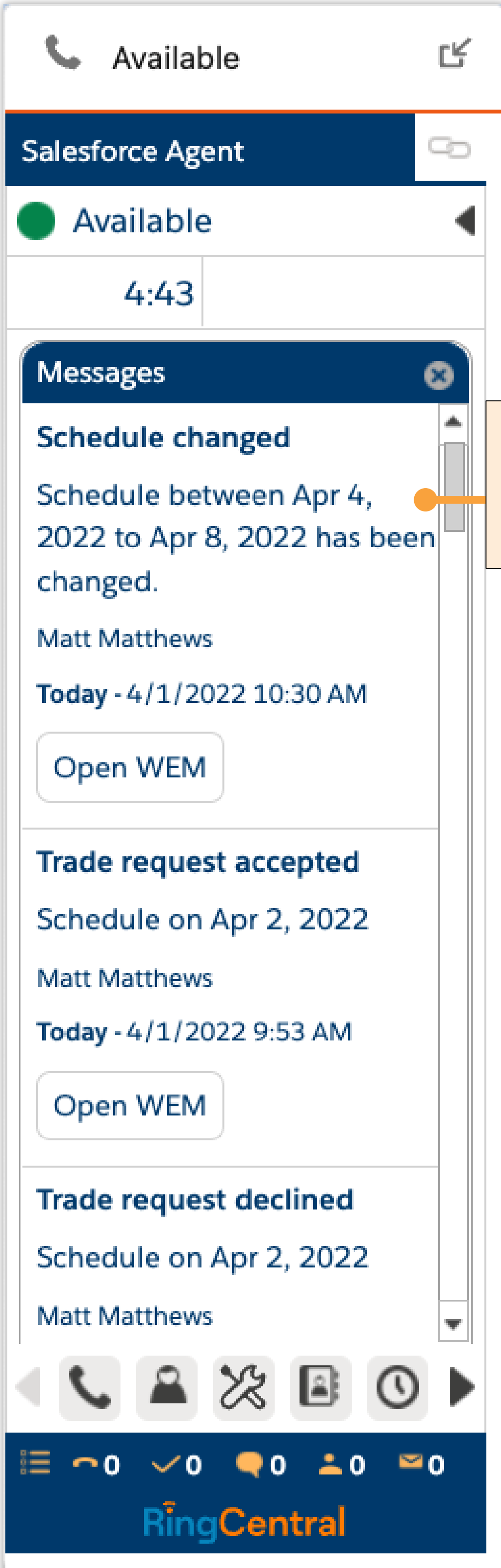


Schedule includes your daily events like breaks, lunches, and even customer commitments assigned to you.

Access and edit customer commitments before they are due by clicking on them here.

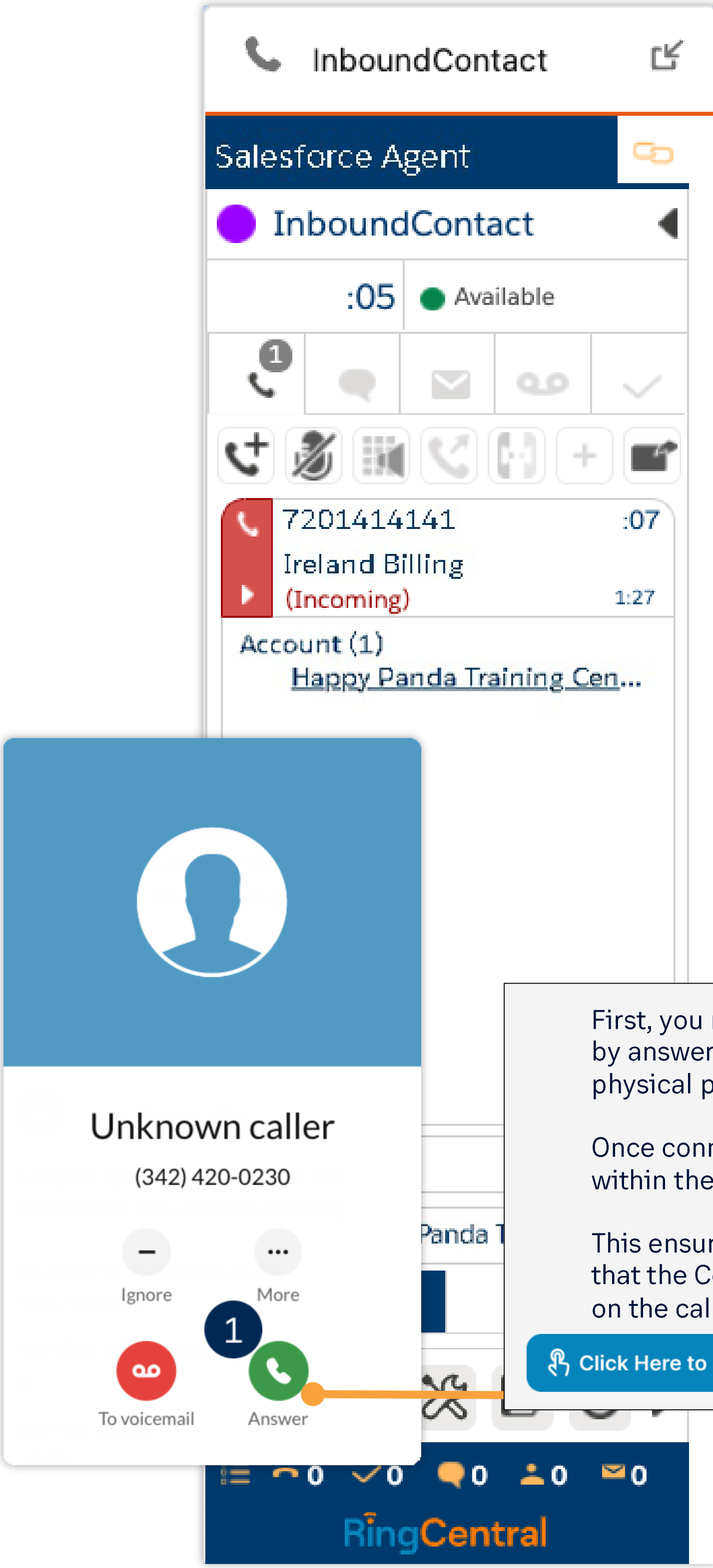
Messages

Go Back and Explore More



Messages displays internal messages such as schedule changes or other messages.

Take Inbound Calls (Establish the Agent Leg)



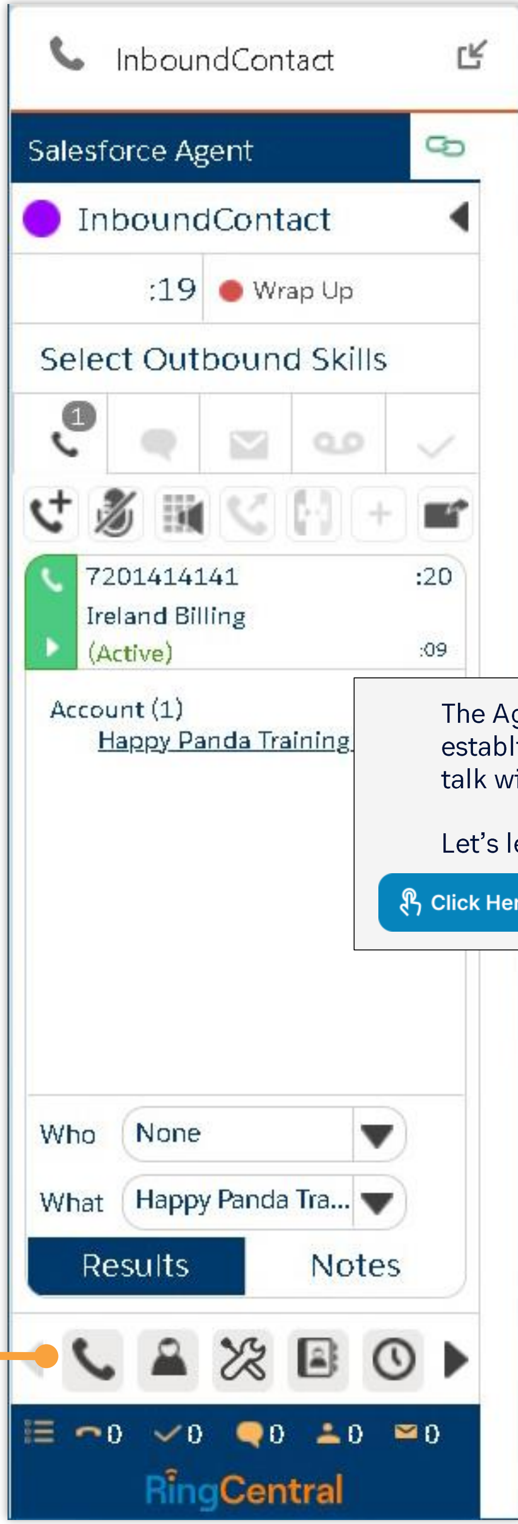
First, you need to establish the **Agent Leg** by answering your RingCentral app or physical phone.

Once connected, all call controls happen within the Salesforce Agent tool.

This ensures that you can hear the call and that the Contact Center tracks and reports on the call.

Click Here to See It

Take Inbound Calls (Active Call)



The Agent Leg is now established, and you can now talk with the customer.

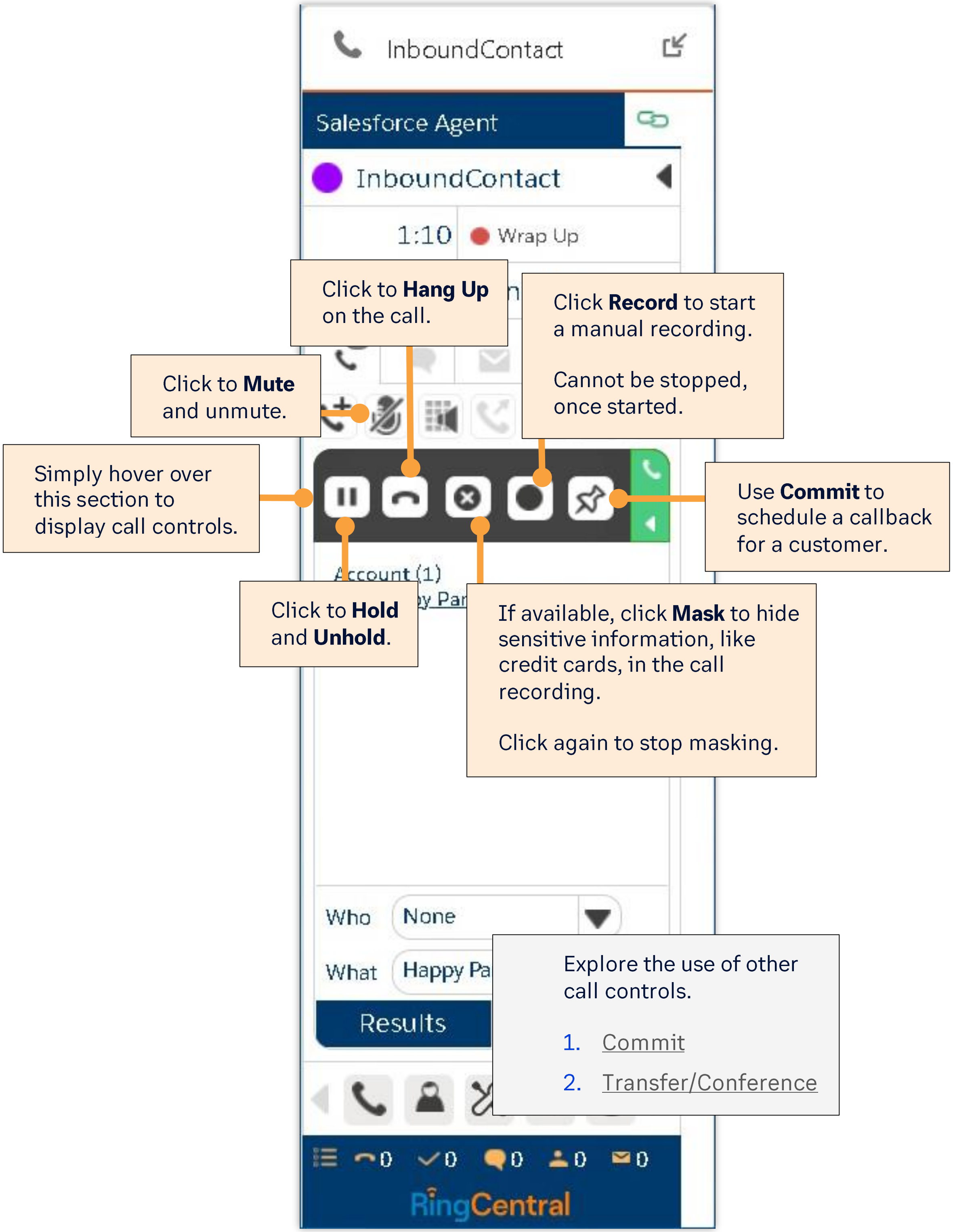
Let's learn about **Call Controls**.

Click Here to See It

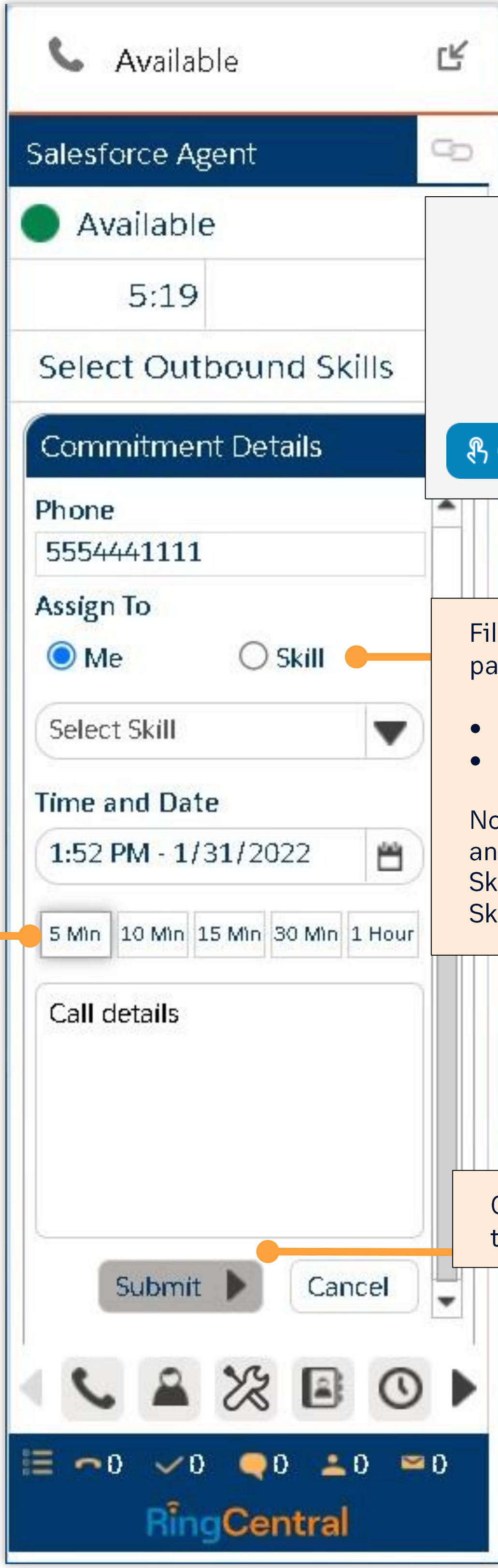
These icons are used the same as when they are located in the main section, when you are waiting for an active contact.

Take Inbound Calls (Call Controls)

Go Back and Explore More



Scheduling Commitments



Commit allows you to schedule callbacks to customers.

Click to see what happens when a commitment is due.

Click Here to See It

Fill out all of the information, paying special attention to :

- **Assign To** – you or a Skill
- Accurate Time and Date

Note: If committing to a Skill and you handle more than one Skill, you must use the Select Skill dropdown.

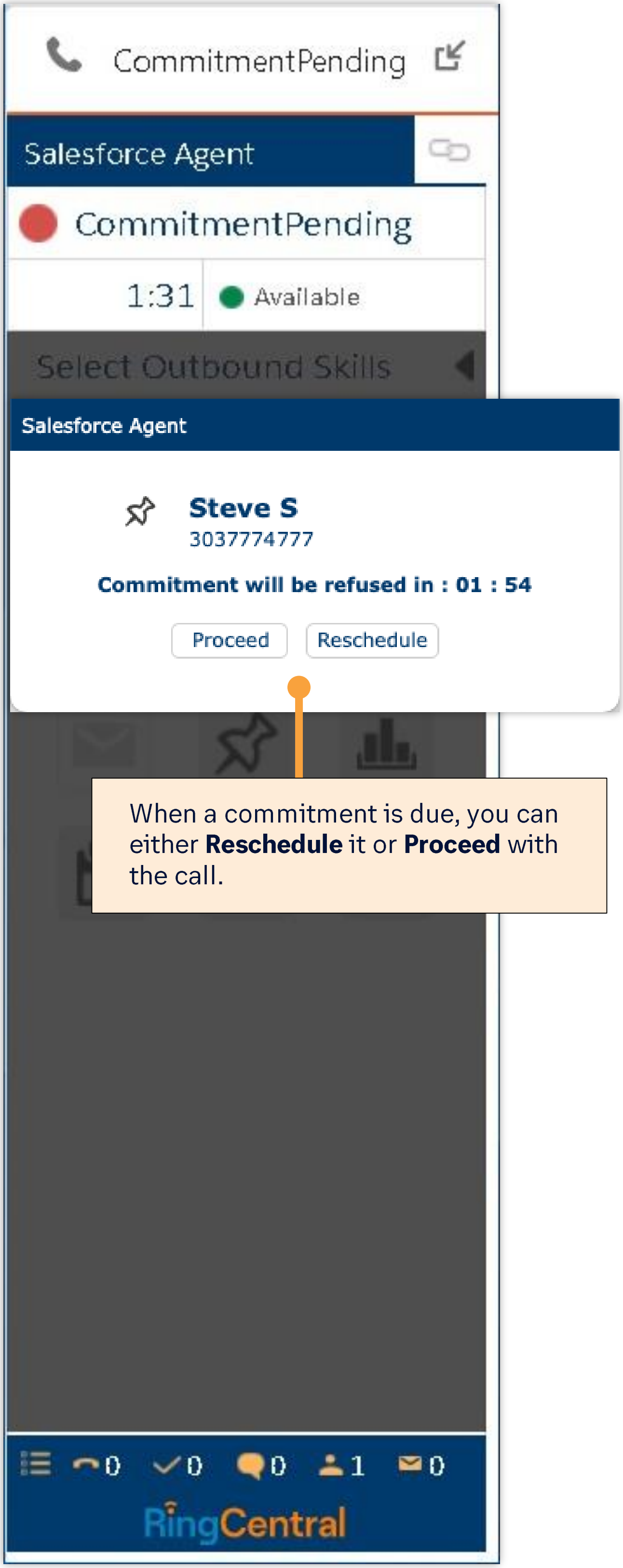
Use these buttons to quickly schedule a commitment for the current day and time, plus the timeframe selected.

Selecting **10 Min** schedules it for the current time, plus 10 minutes.

Click **Submit** to set the commitment.

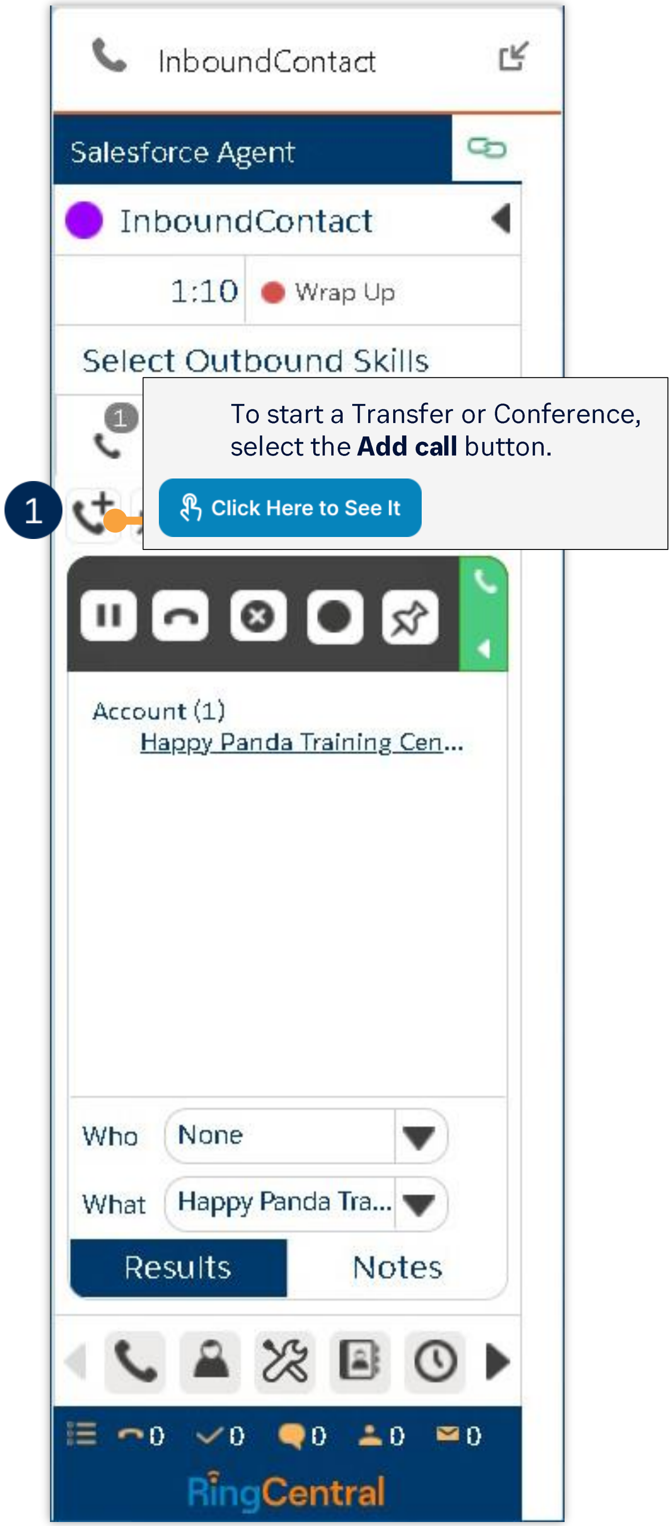
Commitment Due

Go Back and Explore More

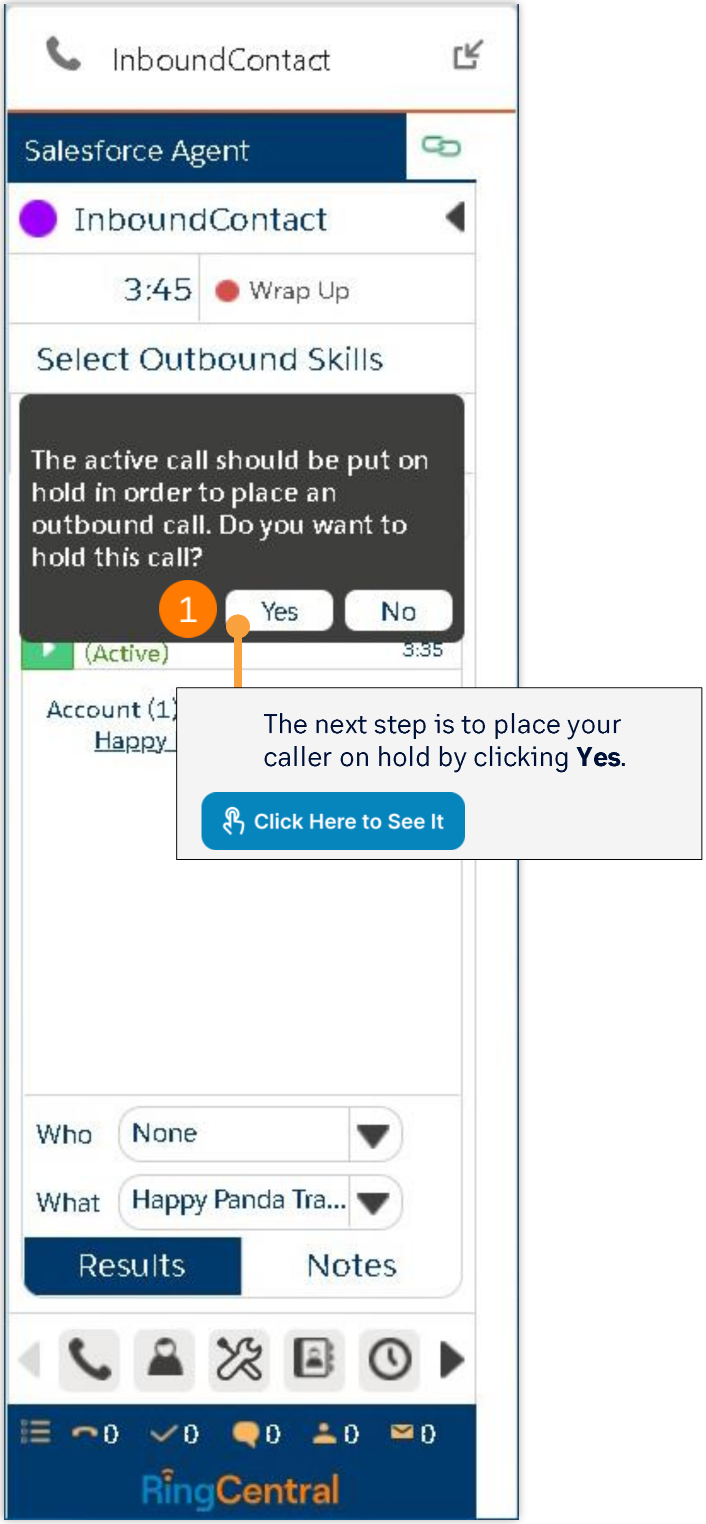


When a commitment is due, you can either **Reschedule** it or **Proceed** with the call.

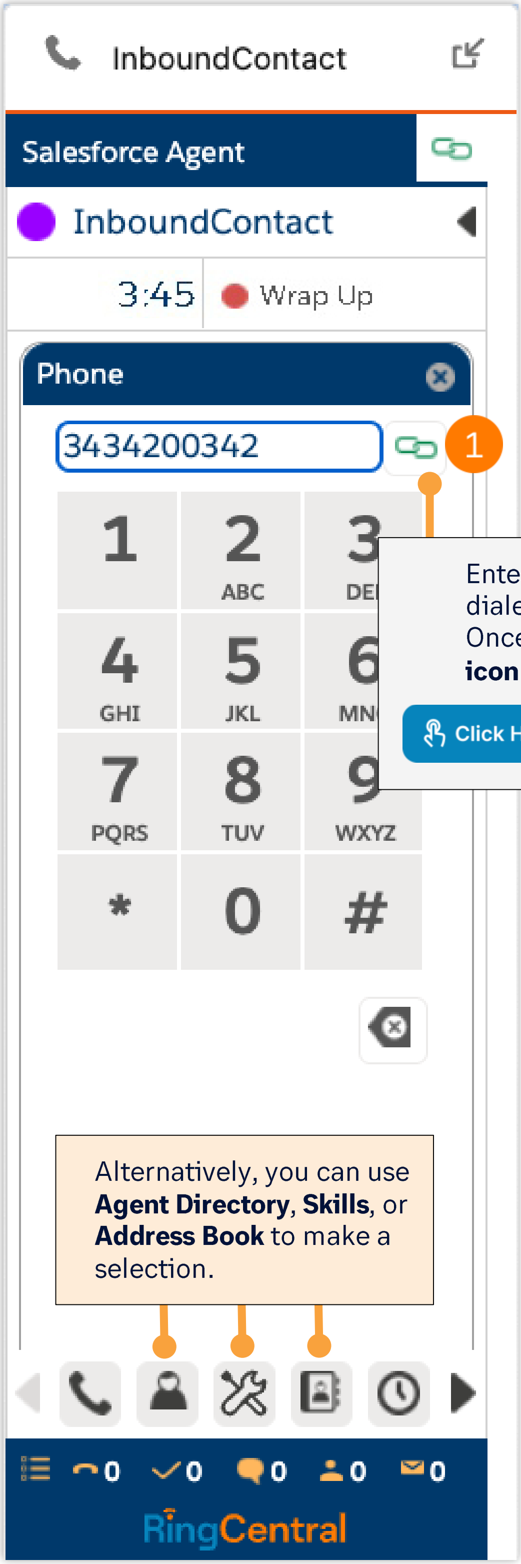
Transfer/Conference (Add Call)



Transfer/Conference (Caller On Hold)



Transfer/Conference (Number Selection)

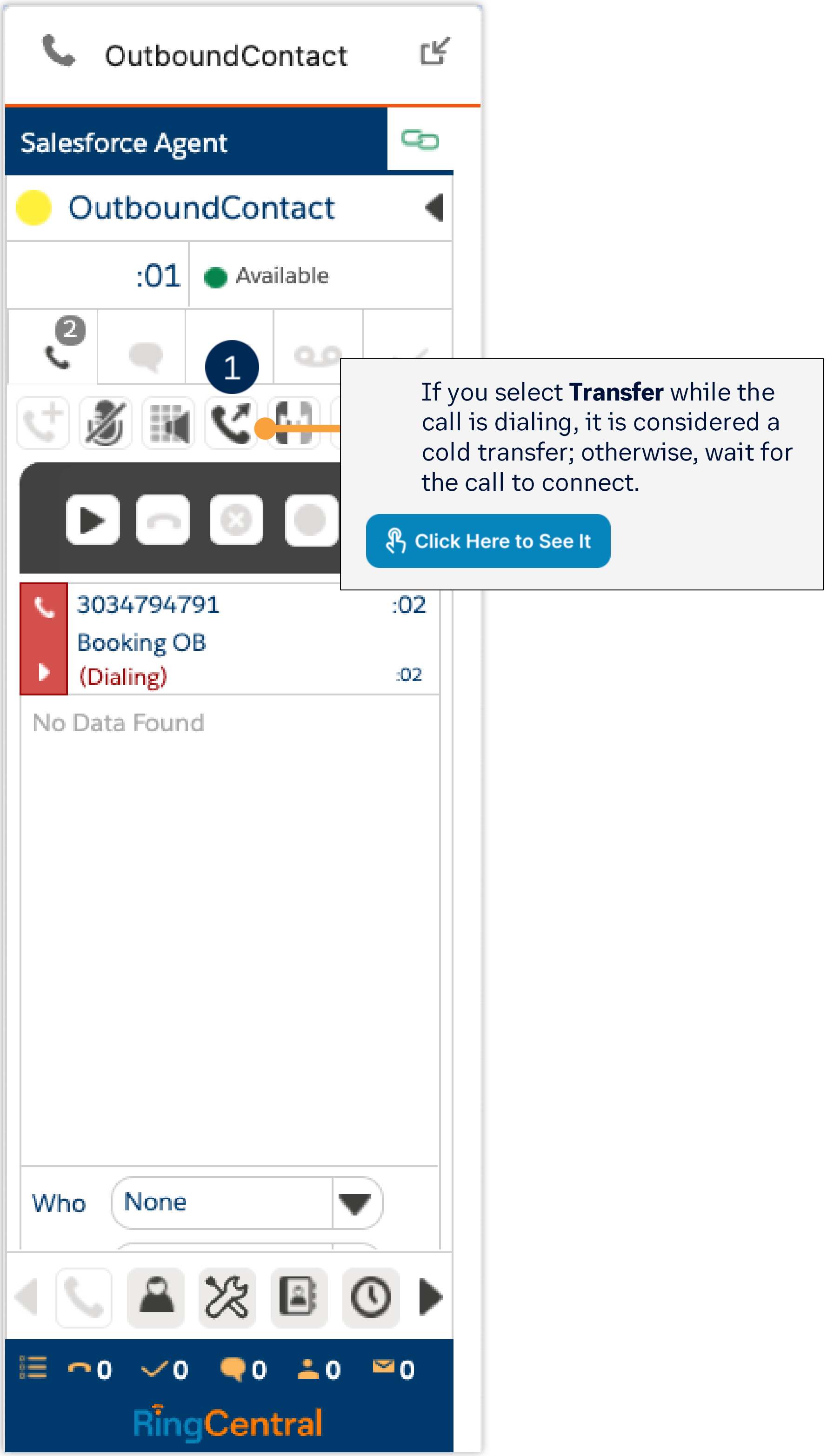


Enter a number for a manually dialed transfer/conference. Once entered, click the **chain icon** to initiate the call.

Click Here to See It

Alternatively, you can use **Agent Directory**, **Skills**, or **Address Book** to make a selection.

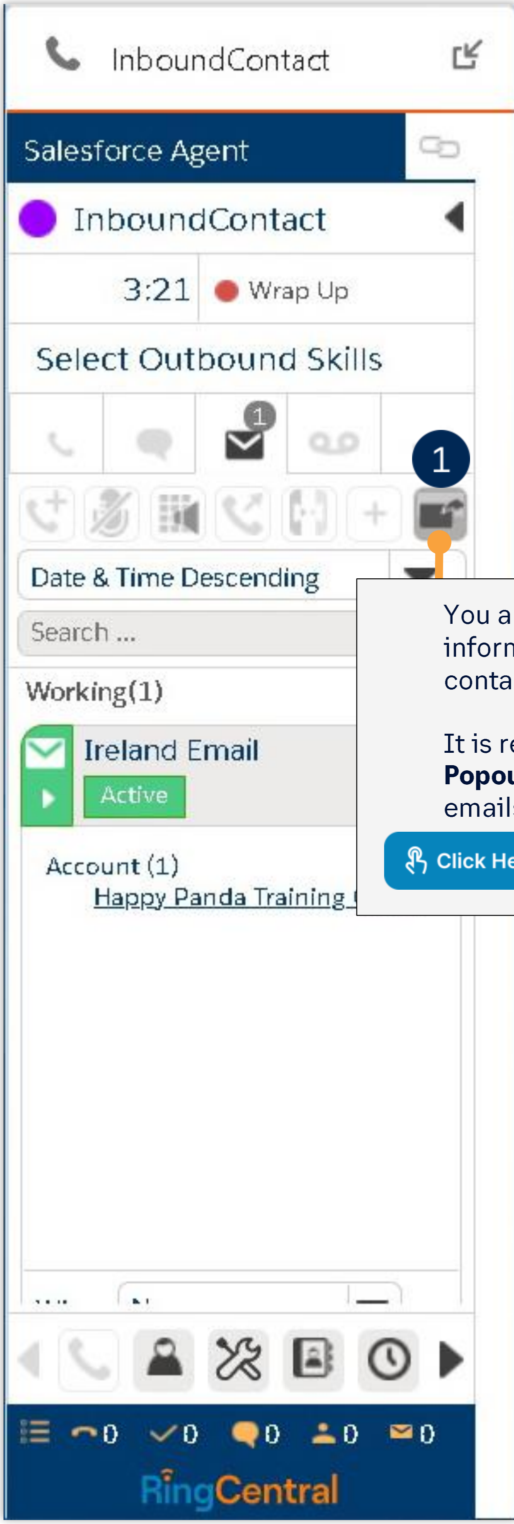
Transfer/Conference (Cold Transfer)



Transfer/Conference (Complete)

Go Back and Explore More

Initial Email Contacts



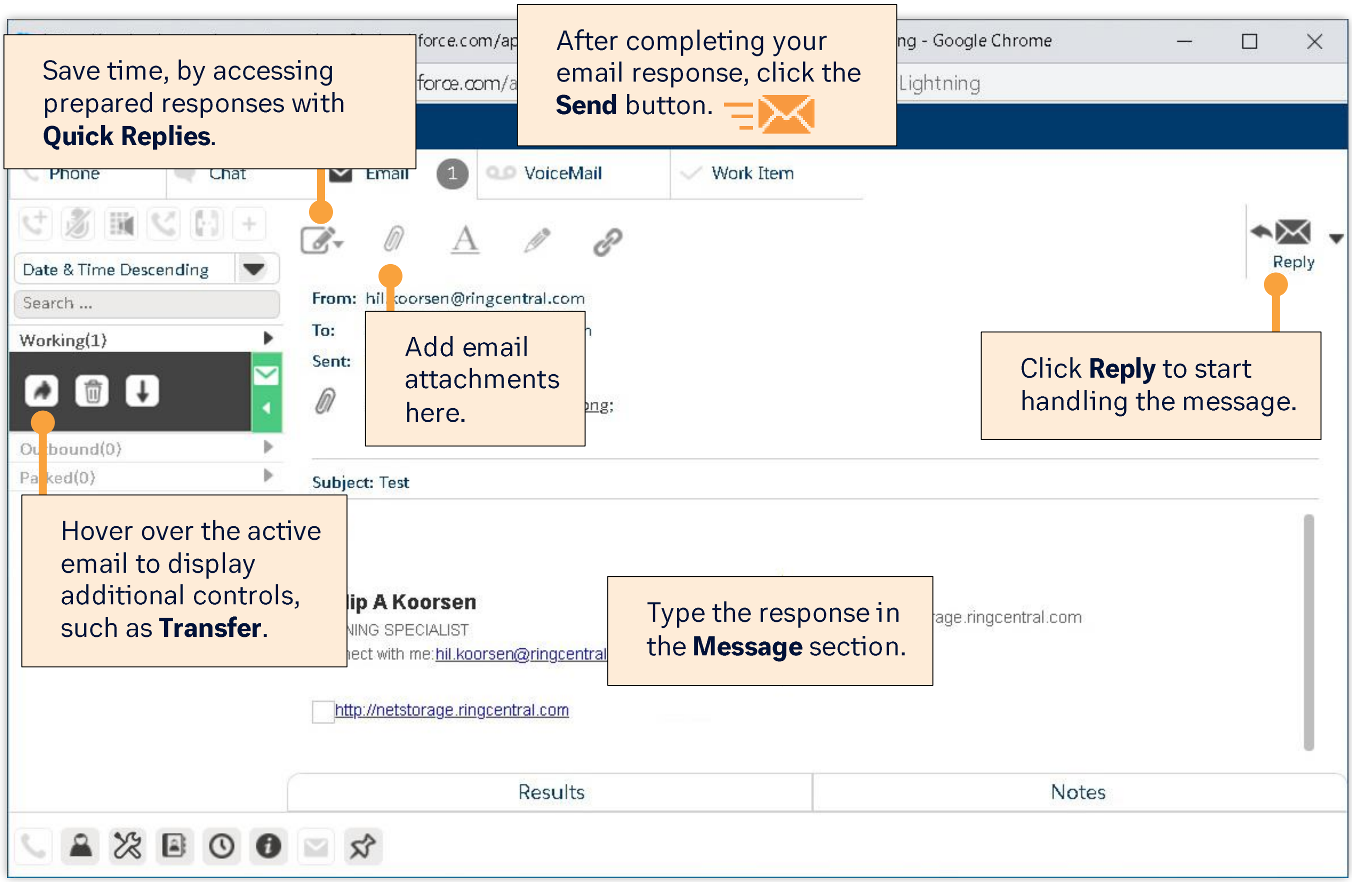
You are presented with basic information when an email contact is received.

It is recommended to use the **Popout** button when handling emails and chats.

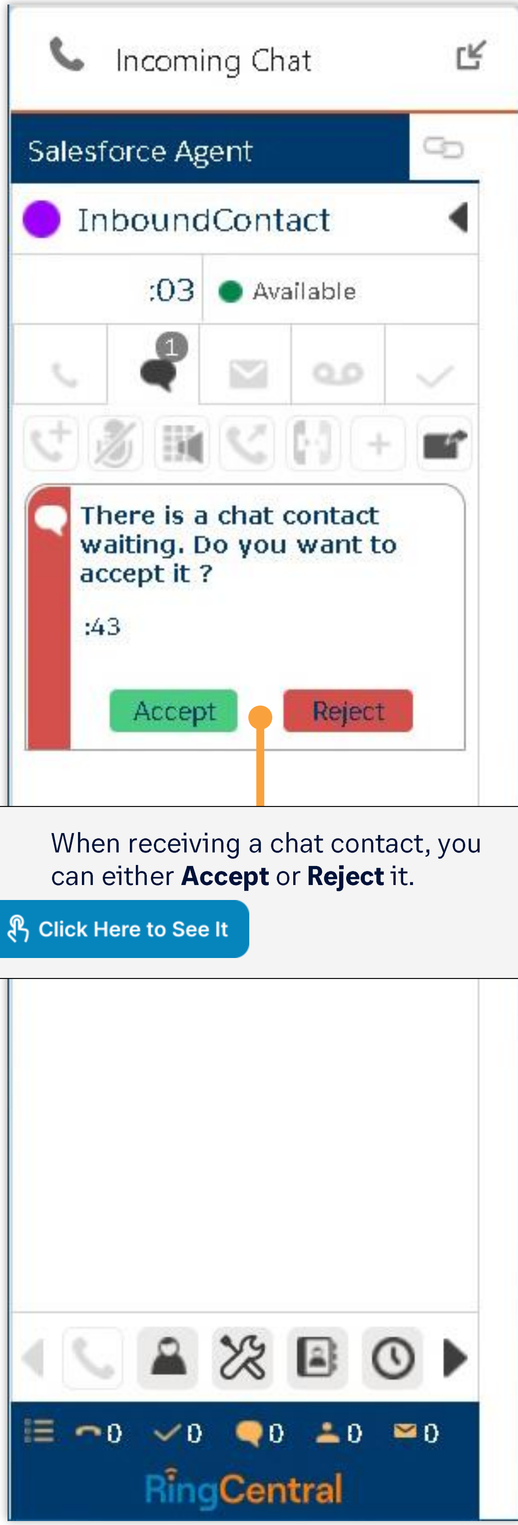
Click Here to See It

Handling Emails

Go Back and Explore More



Initial Chat Contacts

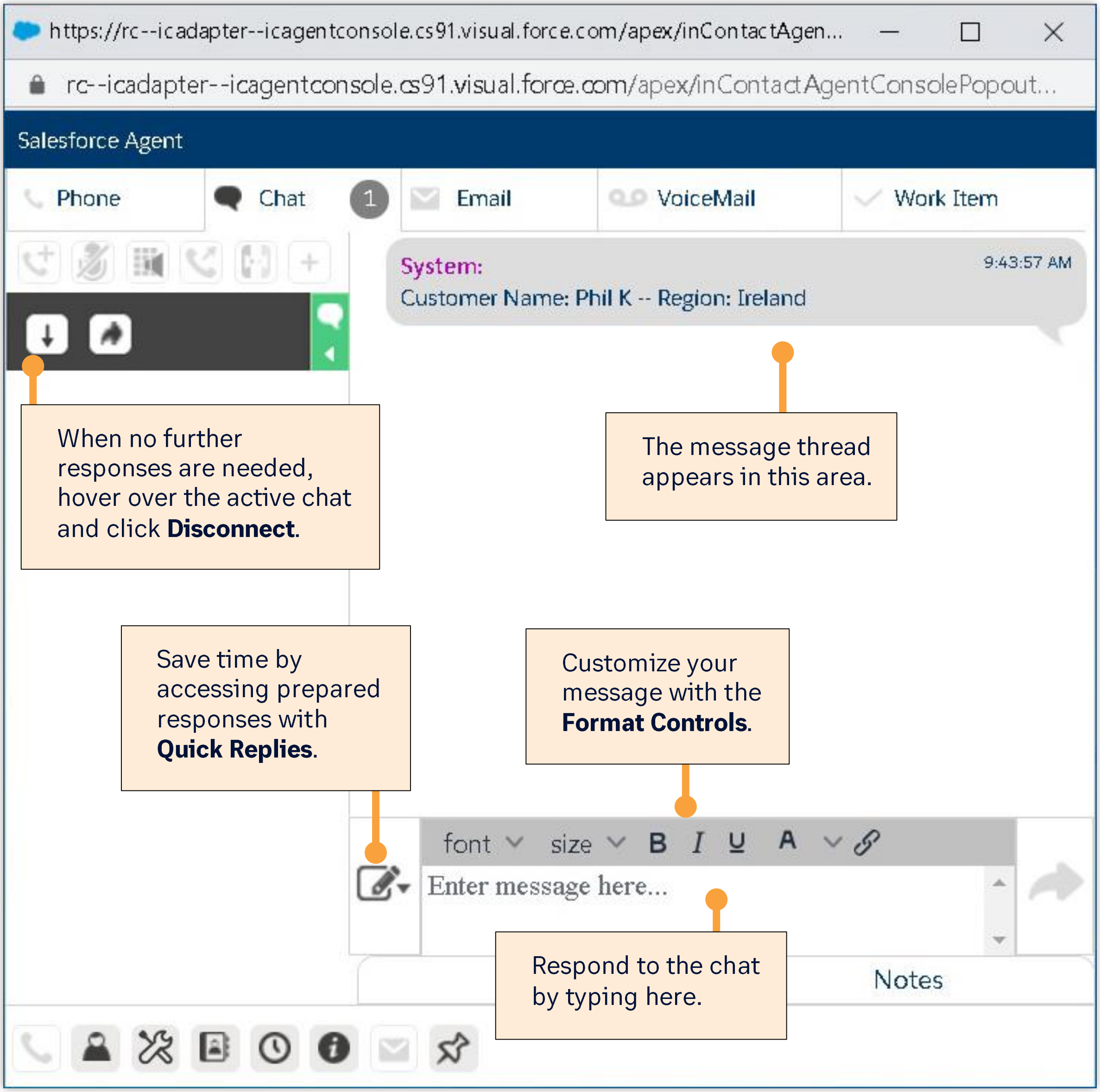


When receiving a chat contact, you can either **Accept** or **Reject** it.

Click Here to See It

Handling Chats

Go Back and Explore More

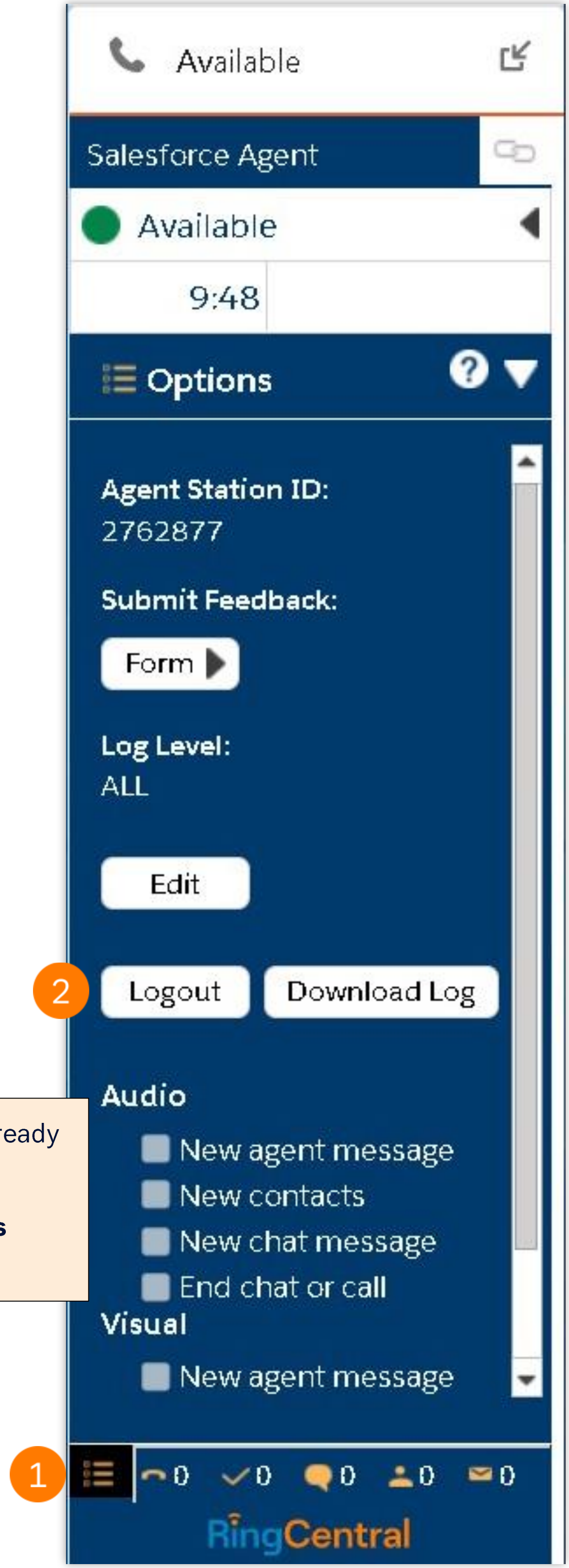


Handling Voicemails

Go Back and Explore More

Logging Out

Go Back and Explore More



When you are ready to logout:

1. Click **Options**
2. Click **Logout**