Guide by
talkdesk

A Guide to Talkdesk for AGENTS

Getting started / Make and receive calls
Recent calls / Voicemails / Contacts / more...

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// Welcome to Talkdesk! //

TALKDESK WAS BUILT WITH THE AGENT IN MIND. We made sure that everything you should know about each customer pops up in your computer screen, when they call. Talkdesk makes it easy for you to answer and to make calls, to edit customer information and to write notes about your calls.

This manual will **help get you acquainted with the Talkdesk integration**, will provide more information about the functions and will give you tips on how to implement the most popular automated tasks.

We really hope **Talkdesk makes your job easier** and that **you love it as much as we do**! Do more talking and less logging to revolutionize your customers experience.

If you run into any problems, have questions or just want to offer some **helpful feedback**, feel free to contact us at ***feedback@talkdesk.com***.

Getting Started

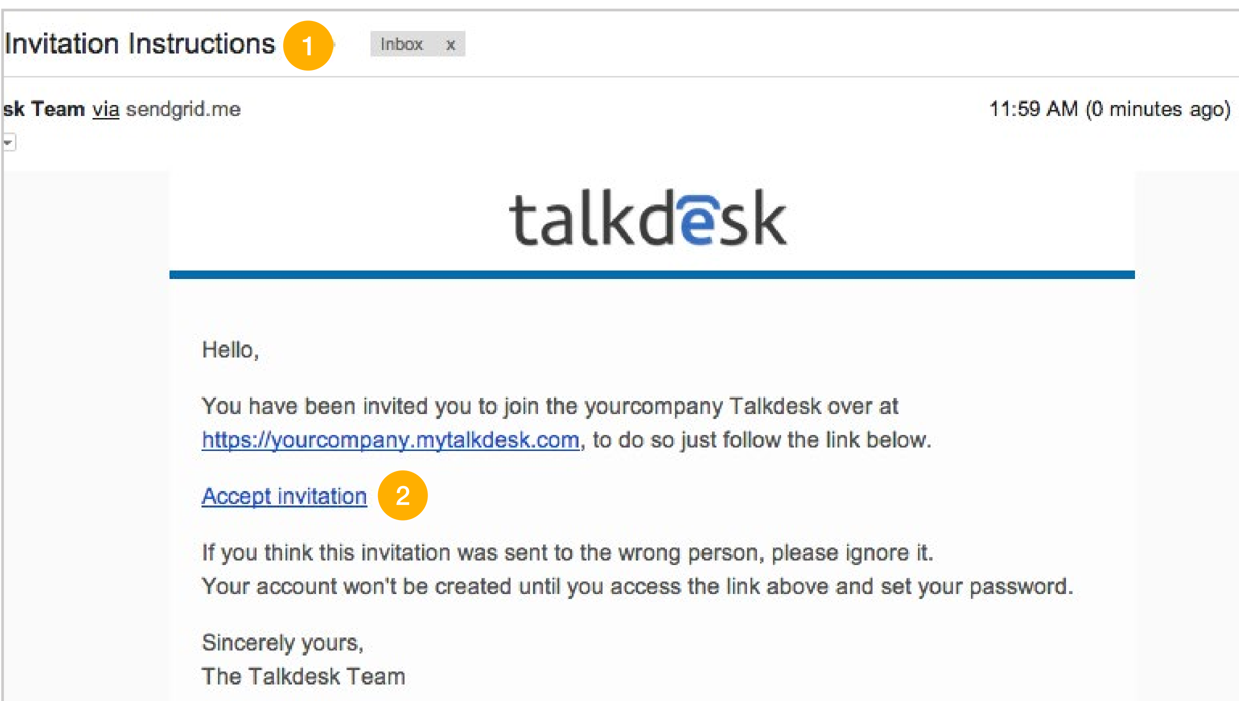
1

At this point, your manager has already set up the Talkdesk and sent you an email invitation.

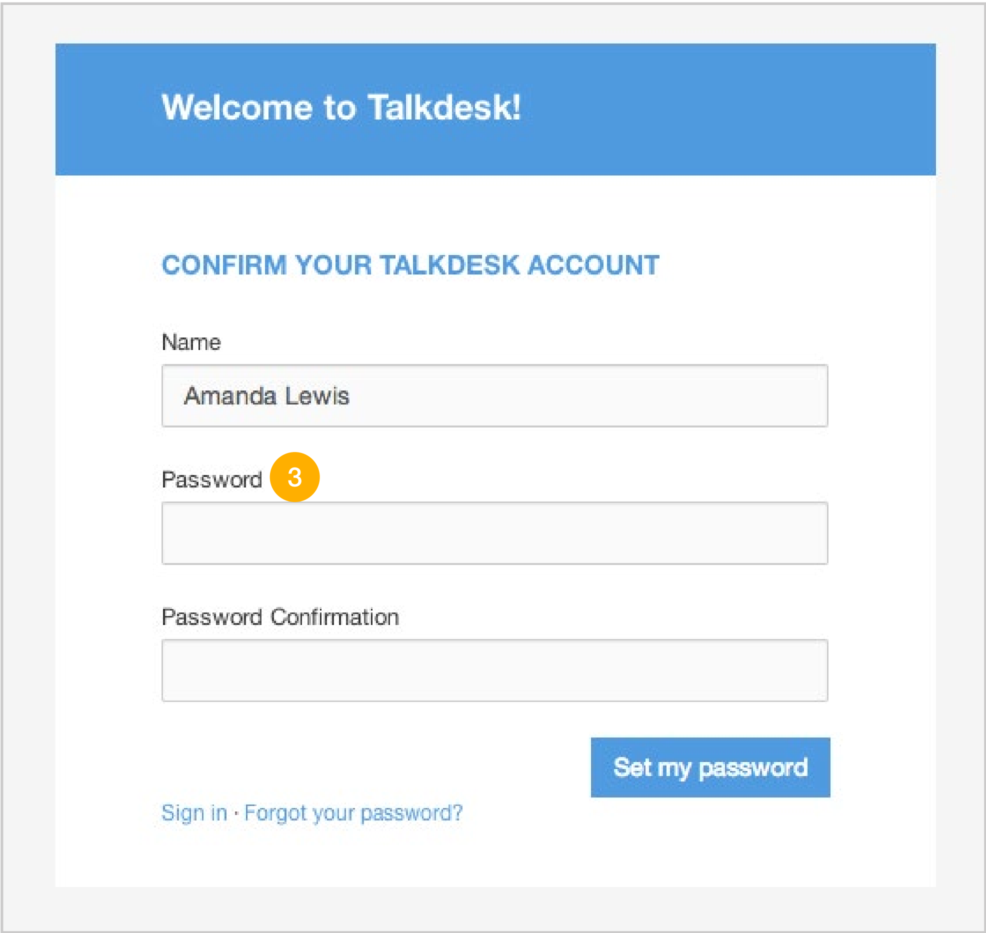
Before you open the email, **MAKE SURE YOU ARE USING GOOGLE CHROME AS YOUR BROWSER**. Talkdesk works best on **Google Chrome**.

1.1 // Choosing Your Password

Open the email entitled “**[TALKDESK] INVITATION INSTRUCTIONS**” 1 and ***click*** on the link that says “**ACCEPT INVITATION**”. 2



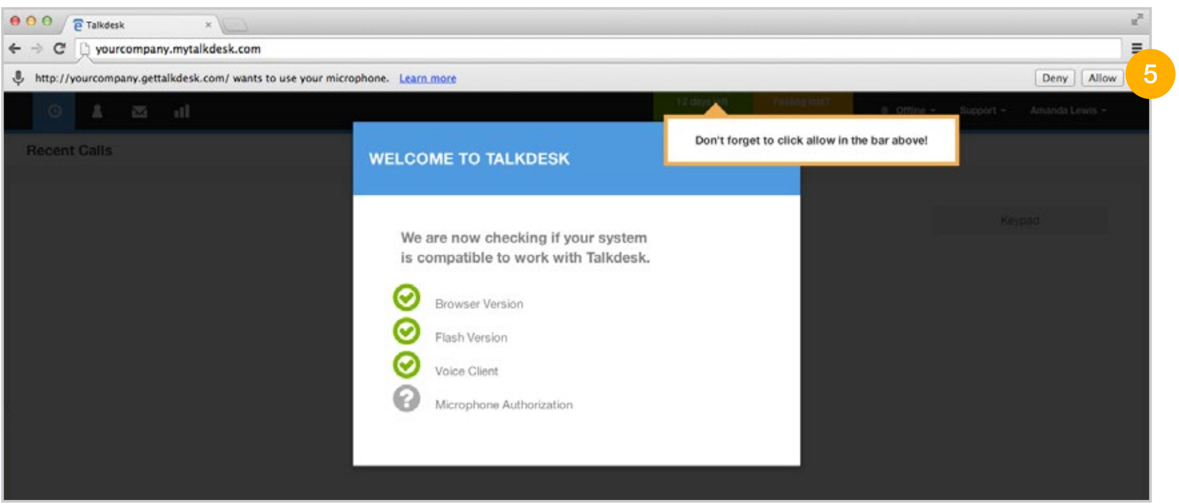
After you click on the link, you will be asked to ***choose*** **a password.** 3



https://yourcompany.mytalkdesk.com
is your login URL - Make sure to ***bookmark*** this **link.** 4

1.2 // Setting Up Your Browser to Work With Talkdesk

Once you select a password, you will be **inside your new Talkdesk** and you will see this screen:

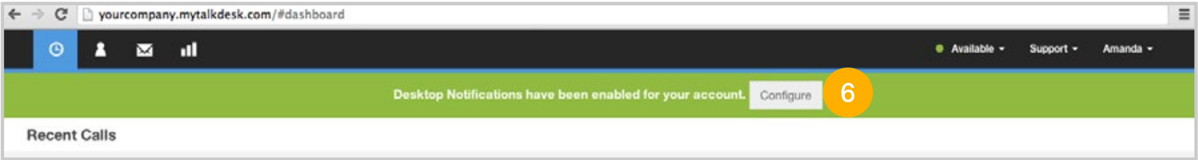


Click the "ALLOW" button 5 at the top of your screen next to the prompt that says "***https://yourcompany.mytalkdesk.com/*** WANTS TO USE YOUR MICROPHONE". This will allow you to use your computer to make and receive calls. It will also allow you to speak with people using your computer microphone or headset. **Talkdesk will not work properly unless you *click* this "ALLOW" button.**

1.3 // Enabling Desktop Notifications

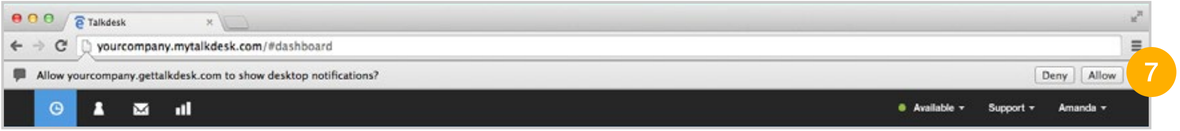
You manager will decide whether or not they would like *Desktop Notifications* to be activated for your account. *Desktop Notifications* allow you to see a screen pop as your phone rings, even if you have the browser minimized.

If your manager has activated *Desktop Notifications* for your account, you will see a gray bar at the top of Talkdesk that says, "ALLOW YOUR COMPANY.MYTALKDESK.COM TO SHOW DESKTOP NOTIFICATIONS". If you would like to use *Desktop Notifications*, ***click*** "CONFIGURE". 6



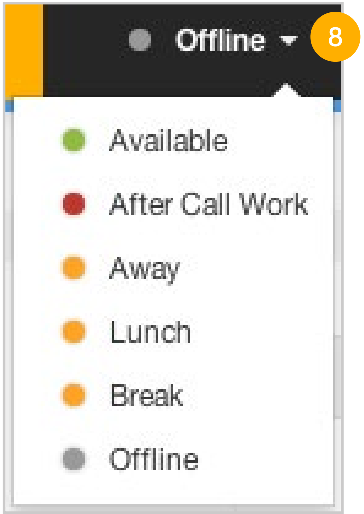
Then ***click*** "ALLOW" in the gray bar that says "ALLOW YOURCOMPANY.MYTALKDESK.COM TO SHOW DESKTOP NOTIFICATIONS". 7

Once you click "ALLOW", you will see a pop-up in the top right corner of your screen saying "TALKDESK DESKTOP NOTIFICATIONS ENABLED". **Success!**



1.4 // Set Your Availability

Agent Status is a helpful way to ***show*** your entire team **what you are up to** and whether or not you are free to take a call. 8



It is also a way for Talkdesk to know whether or not we should send calls your way, or whether you are too busy to receive calls and we should send them to another agent or voicemail.

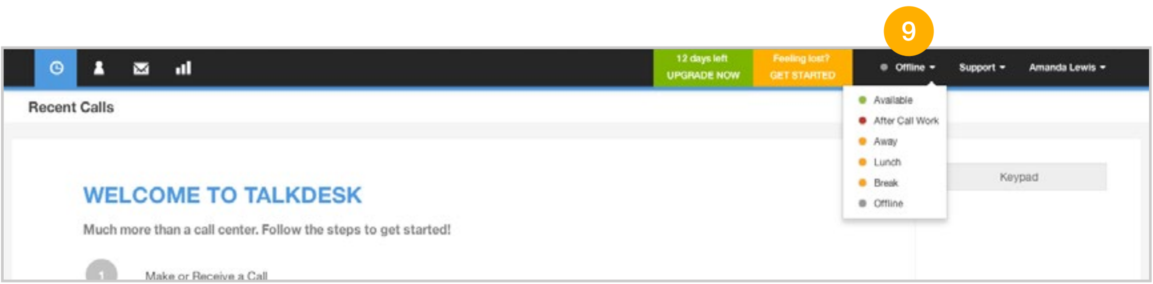
Available › you are ***logged*** into Talkdesk and are **free to take calls**

On a Call › you are ***logged*** into Talkdesk and ***busy speaking with a customer***

After Call Work › your status will automatically change to "**AFTER CALL WORK**" after you end a call, for a predefined amount of time or while you are taking notes about the call; during this time, you can wrap up the call; **you won't receive calls while in this status**

Away › you are ***logged*** into Talkdesk but are away from your computer and **unable to take calls**

Offline › you are **not able to take calls**



Your administrator can modify of add more status options (for example, lunch break) so there may be more status options that the default ones already in your account.

You can **change** your status at any time from the first **dropdown menu** on the top right corner. 9 Talkdesk will also **change your status for you automatically** when you are on a call, away from your desk or logged out.

When your status changes, **everyone signed into Talkdesk will know what you're up to**. They can see your status in the reporting tab, when they are transferring calls and when they are starting a conference call.

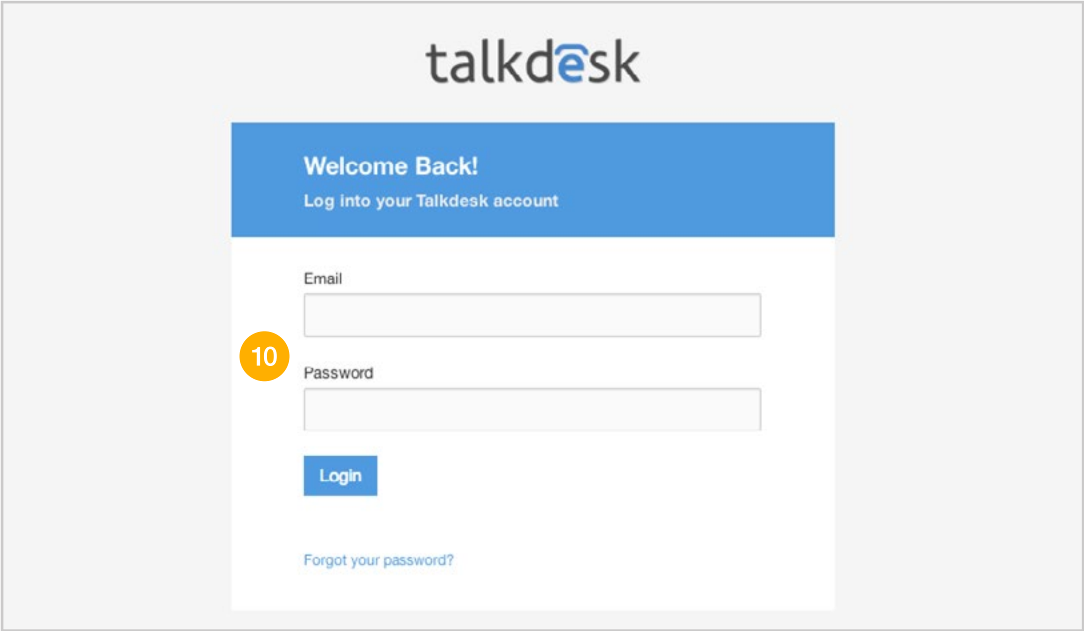
If your status is **red, orange or gray, you can't receive calls**. If your status is green, calls can be routed to you.

1.5 // Logging Into Your Talkdesk Account

To log into Talkdesk, please visit ***https://yourcompany.mytalkdesk.com***.

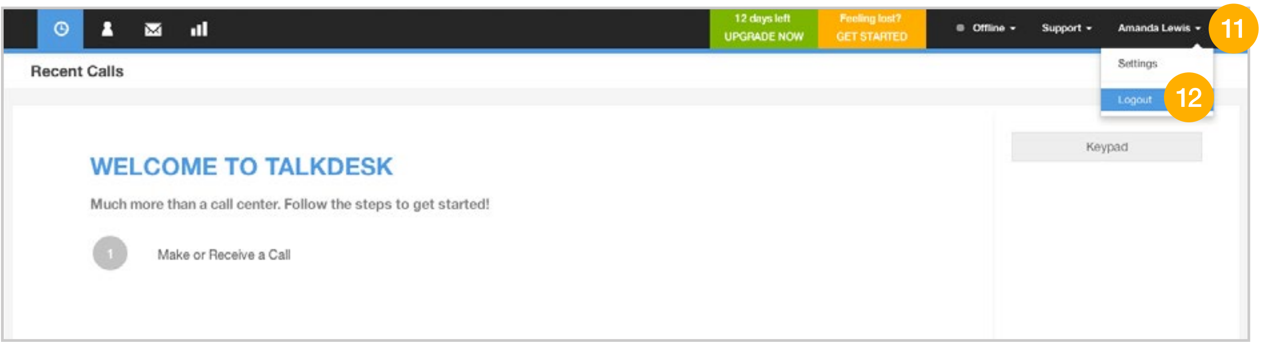
NOTE: *yourcompany* is the name of the company you work for. This link was sent to you in the welcome email from Talkdesk entitled: "[TALKDESK] INVITATION INSTRUCTIONS".

You will then be asked to ***insert*** your **email** and **password** 10 in order to **login to your account**.



1.6 // Logging Out of Your Talkdesk Account

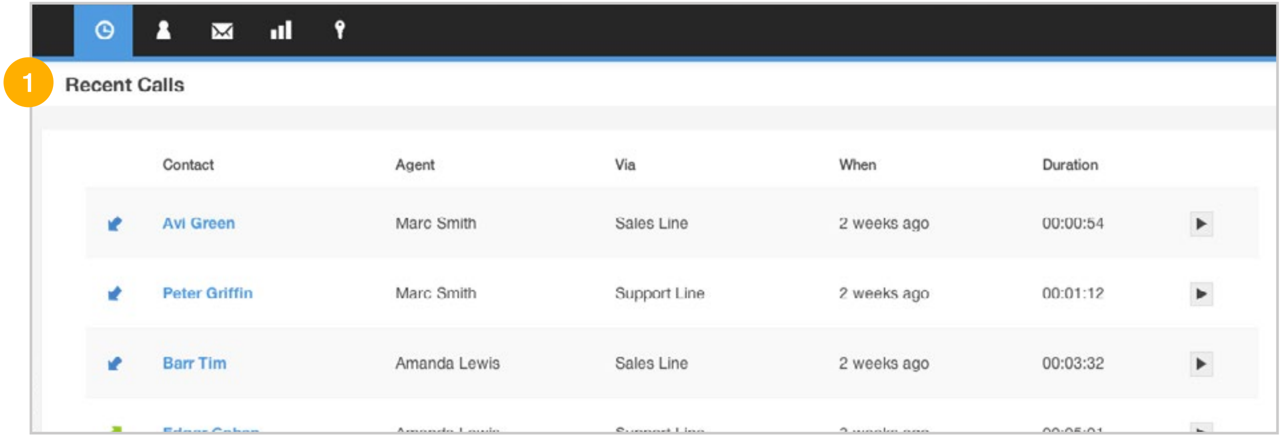
When you are finished with making and receiving calls, updating information, etc. **it is important that you logout of Talkdesk** so we don't route calls to you. To do so, ***click*** on **your name** 11 at the top right corner 12 and ***select*** "LOGOUT".



Recent Calls

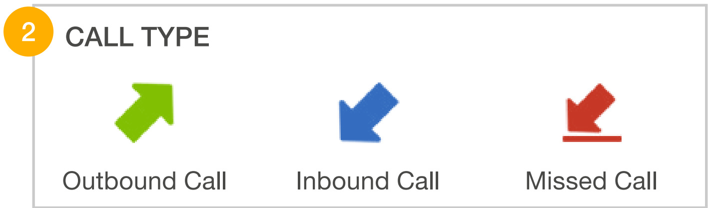
2

When you login to your Talkdesk, you will first see the *Recent Calls* list: 1



The *Recent Calls* list allows you to see a **list of all the people who have contacted your company or team**, listed in chronological order.

The icon on the left ***indicates*** whether the **call was made** (arrow pointing up) or **received** (arrow pointing down) by your company and the color of the arrow indicates whether the call was an **outbound** (green), **inbound** (blue) or it was **missed** (red). 2



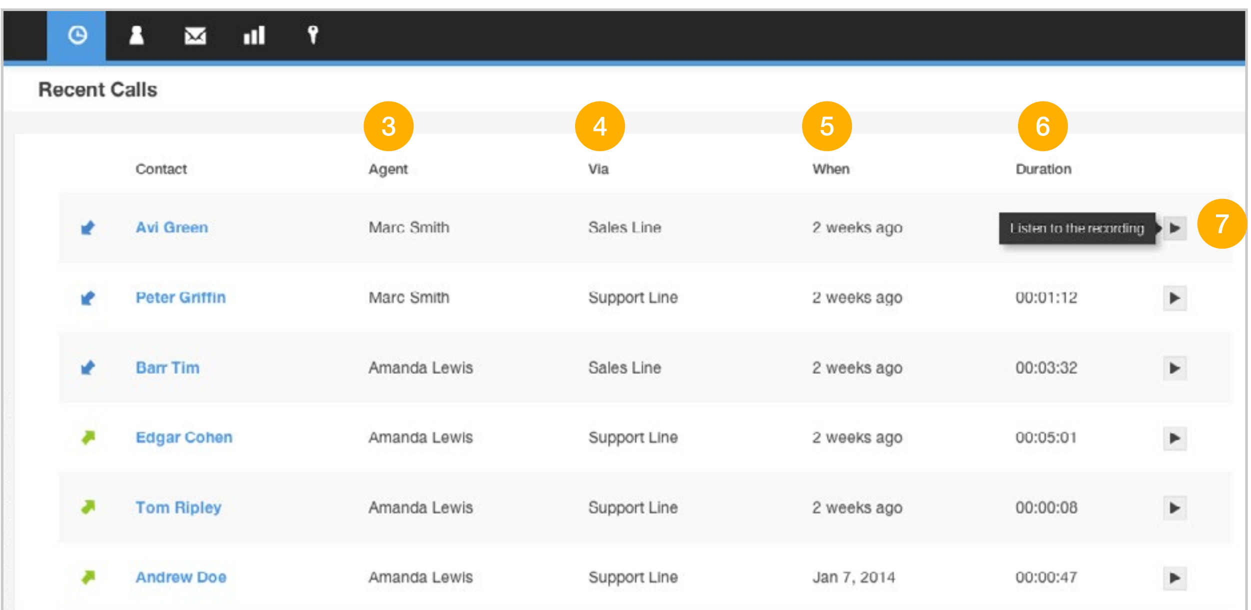
// The "AGENT" column ***shows*** whom the caller **spoke** to from your company. 3

// The "VIA" column ***shows*** what number the caller **dialed** (if the call was received) or what number the agent was using to **contact** the caller (if the call was placed). 4

// The "WHEN" column ***indicates*** when the call was **placed** or **received**. 5

// The "DURATION" column ***indicates*** how long the **call lasted**. 6

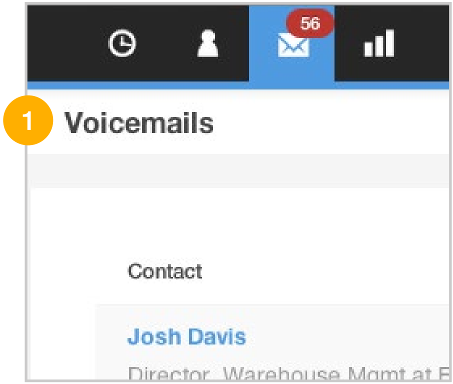
// You can **listen** the recording of the call by ***pressing*** the "PLAY" button. 7



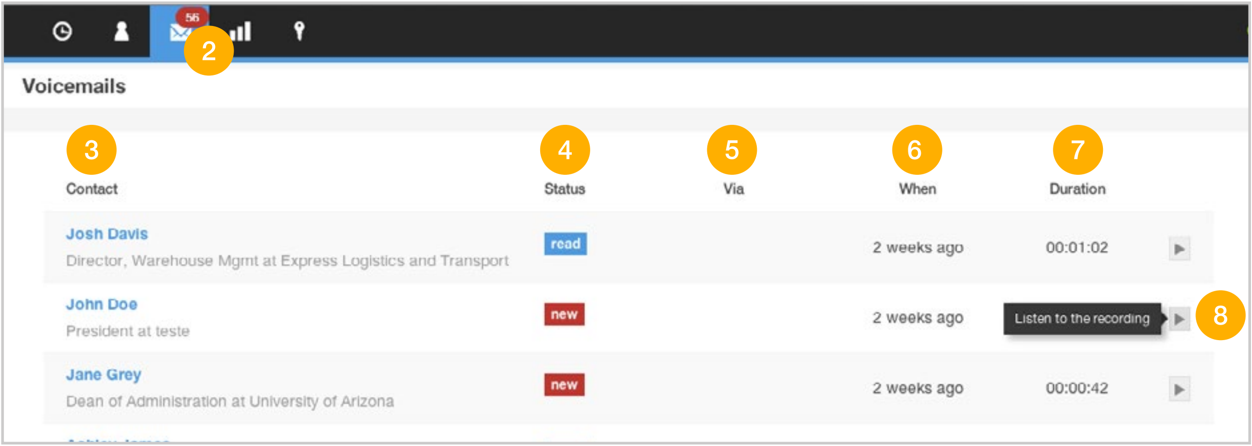
Voicemails

3

The *Voicemails* section is where you can see a **list of all recent voicemails** that your company or team has received, in chronological order. When you ***click*** on the "VOICEMAILS" tab, your screen will look like this: 1



The number on the "VOICEMAIL" icon ***indicates*** the number of **voicemails left in your mailbox**. 2



// The "CONTACT" column ***shows*** the name of the person who left the voicemail (or their phone number if they are a new contact). 3

If you **click** on the **contact name** or **phone number** (if the caller is a new contact), you will **see more detailed information about the caller** who left the voicemail: profile information of that person as well as the previous calls, voicemails and other interactions your company had with him.

// You can ***check*** the status of the voicemail in the "STATUS" column (i.e. new, read). 4

// The "VIA" column ***shows*** what number the caller dialed. 5

// The "WHEN" column ***indicates*** when the voicemail was received. 6

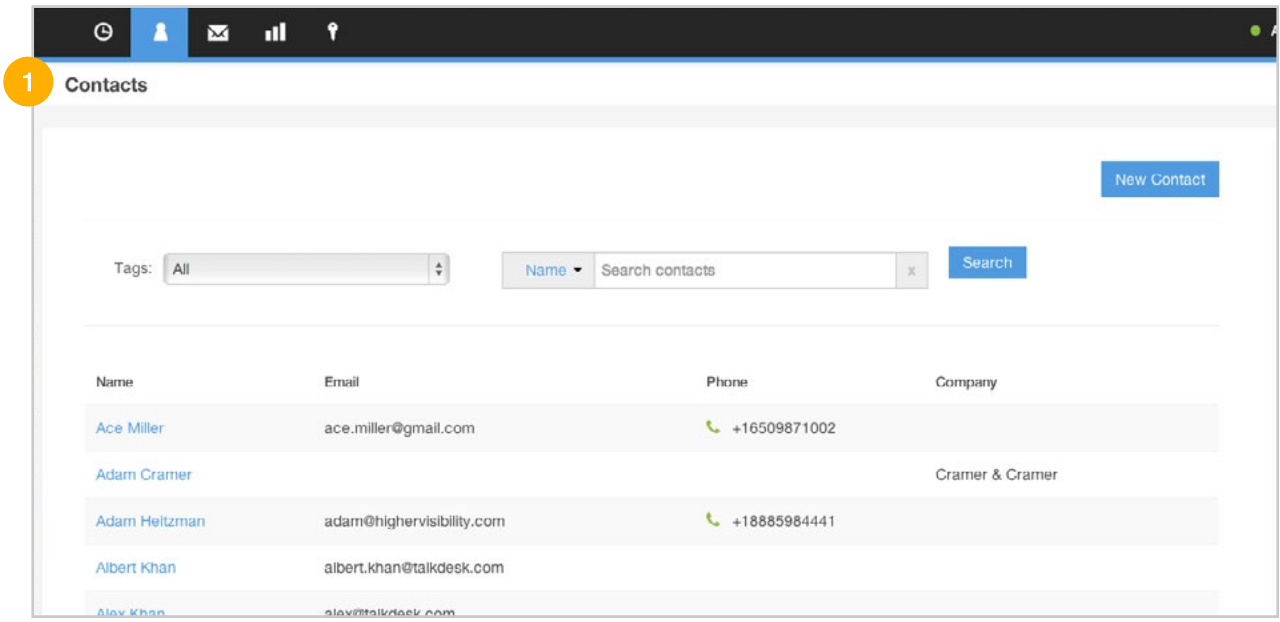
// The "DURATION" column ***indicates*** the length of the voicemail. 7

// You can **listen** to the voicemail recording by ***pressing*** the "PLAY" button. 8

Contacts

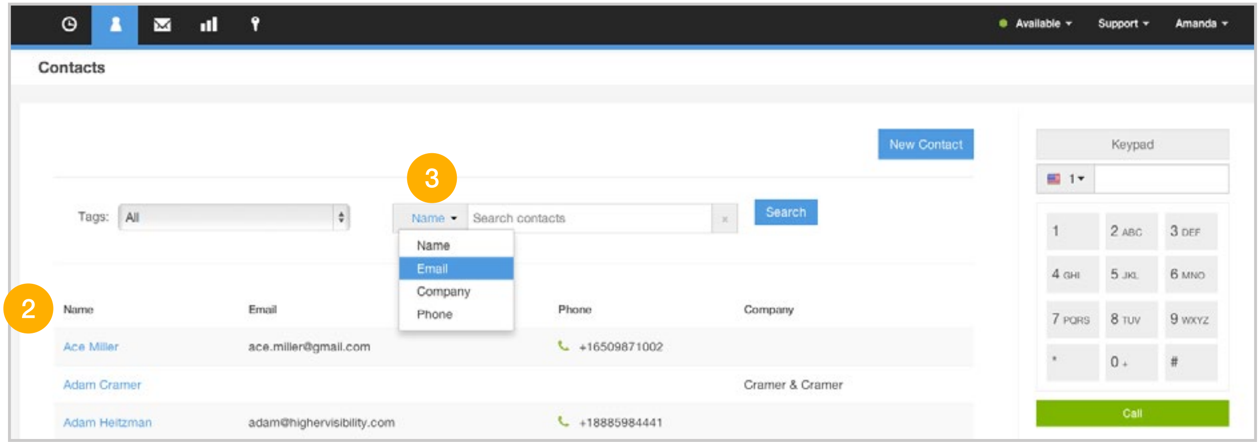
4

In the *Contacts* tab 1 you can **search** for contacts, **edit** existing contacts, **create** new ones and **delete** existing contacts. Below is information about how you can optimize the use of the contacts tab.



4.1 // Searching Contacts

By default your contacts list displays a **set of contacts** ordered alphabetically by name (the name is replaced by the phone number in case it does not exist). 2



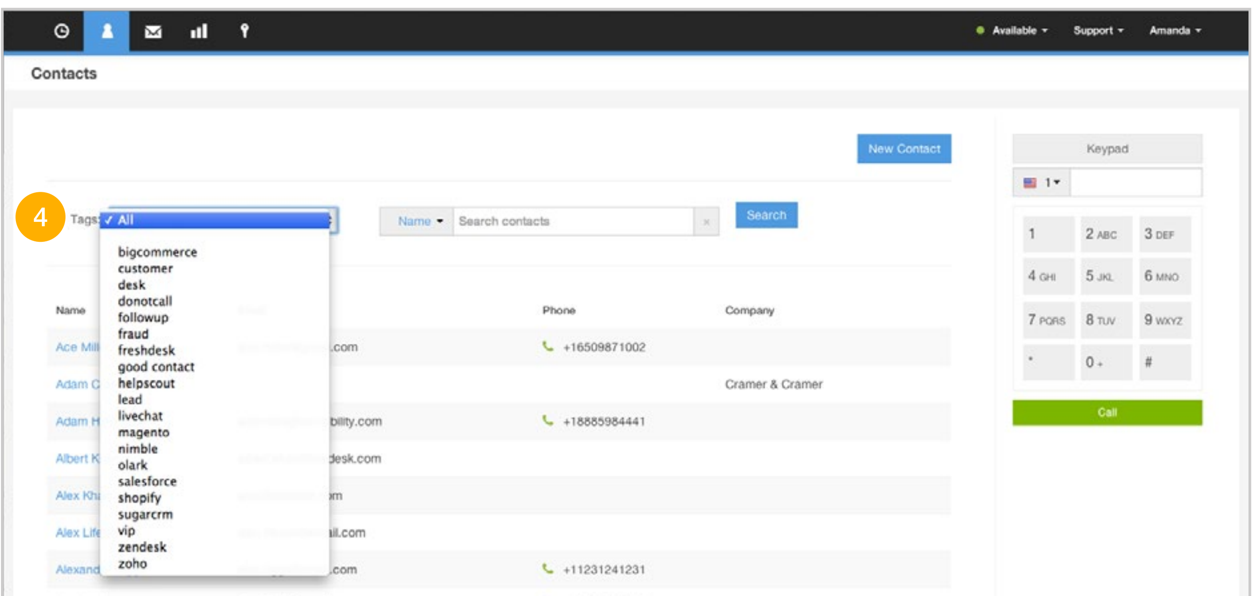
You can **search for contacts** (and sort contact lists) by the contact's first or last name ("NAME"), the contact's email ("EMAIL"), the company the contact works for ("COMPANY") or the phone number the contact dialled when calling your company ("NUMBER").

First, ***choose*** how you would like to **sort the contact list** from the **dropdown menu**, 3 then ***type*** in the **information** you are looking for and ***press*** "ENTER", the calls will be sorted as per your selection.

4.2 // Searching for Contacts by Tag

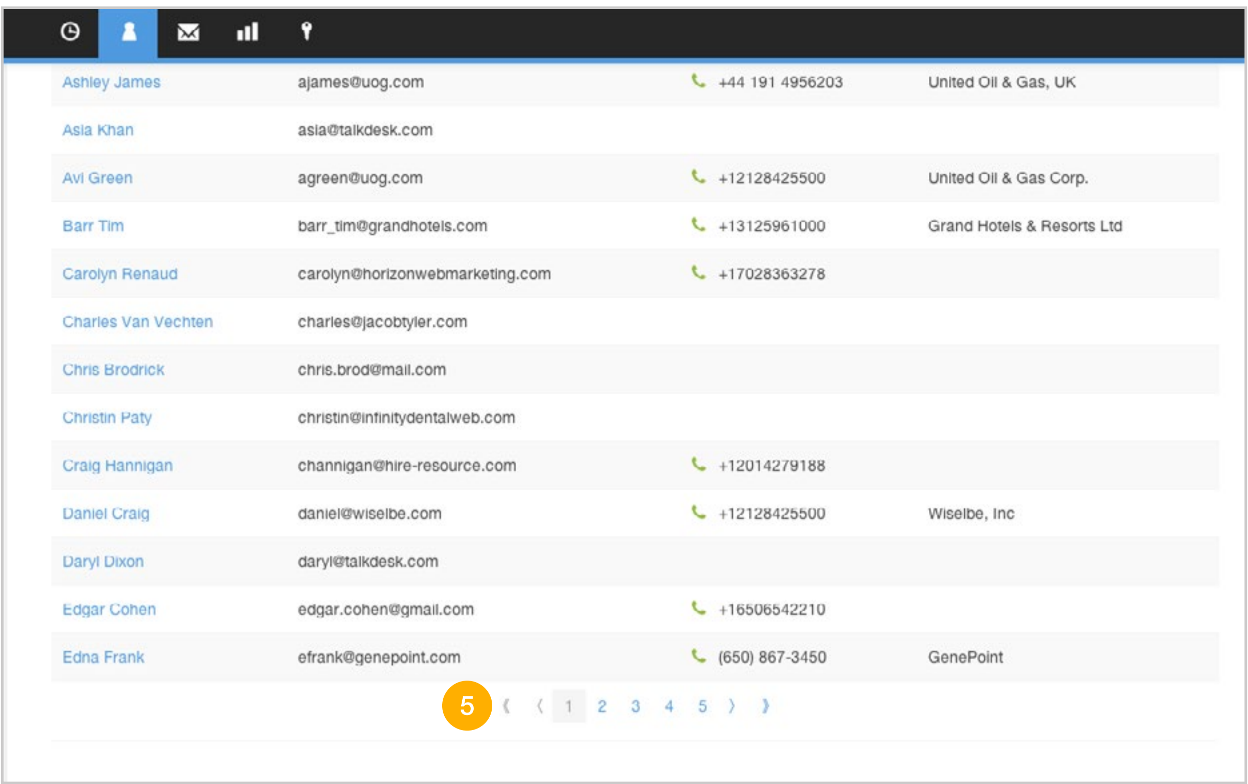
You can also **search** for contacts by "TAG". A "TAG" is a label that is applied to the contact for identification purposes. For example, you can **apply** a tag called "VIP" to your best customers and then **search** the contact lists for all customers with the "VIP" tag.

To do this, there is a separate dropdown menu. Just ***select*** the "TAG" 4 that you would like to sort the list by and the result will be a list of all contacts that have that tag.



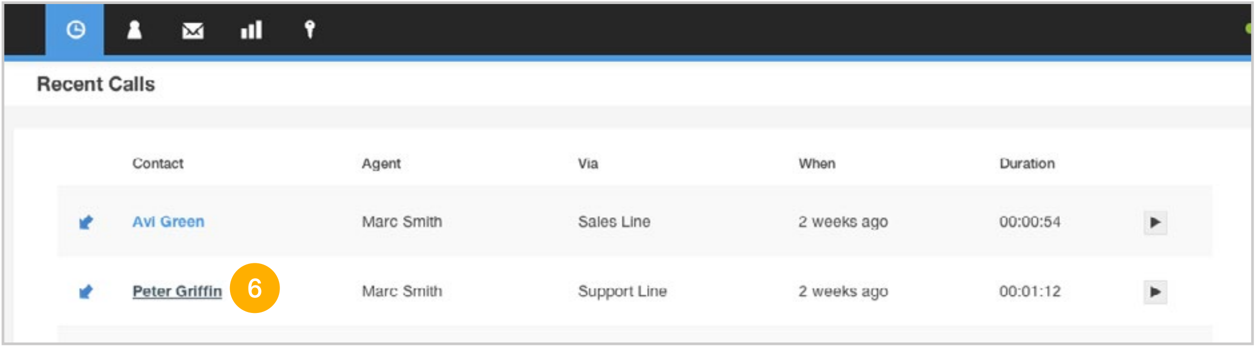
This is helpful for viewing and compiling lists of all partners, leads, qualified leads, unresponsive contacts etc.

By default, only 25 contacts are displayed at a time. If you **click** on the **arrows** at the bottom of the page, you will see the **next 25 contacts.** 5

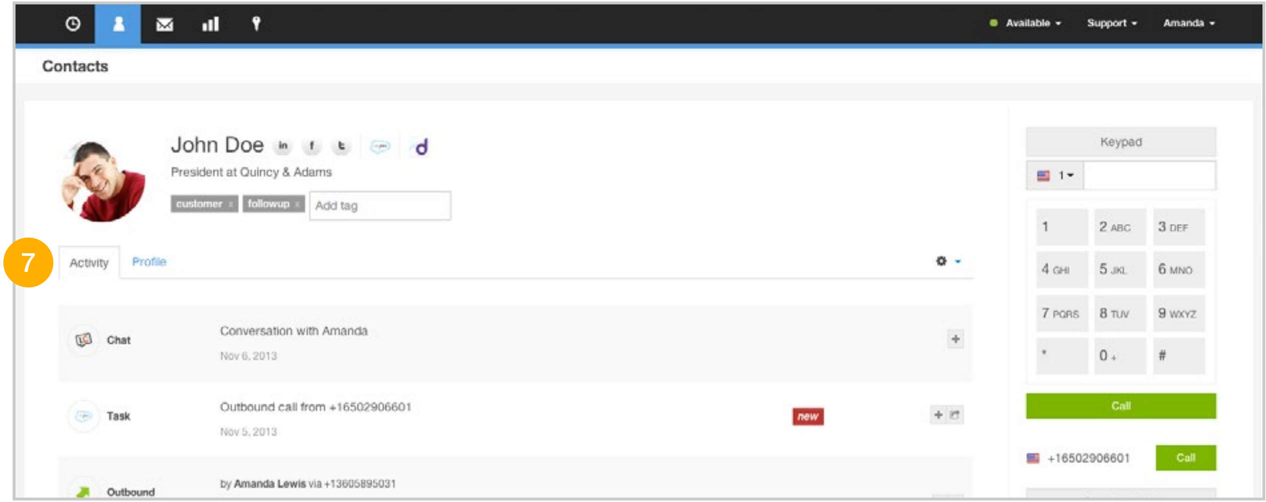


4.3 // Contact Activity

To **open a contact**, click on their **Name** or **Phone number** on the "RECENT CALLS", "VOICEMAILS", "CONTACTS" section, call bar or in any other place on Talkdesk. 6



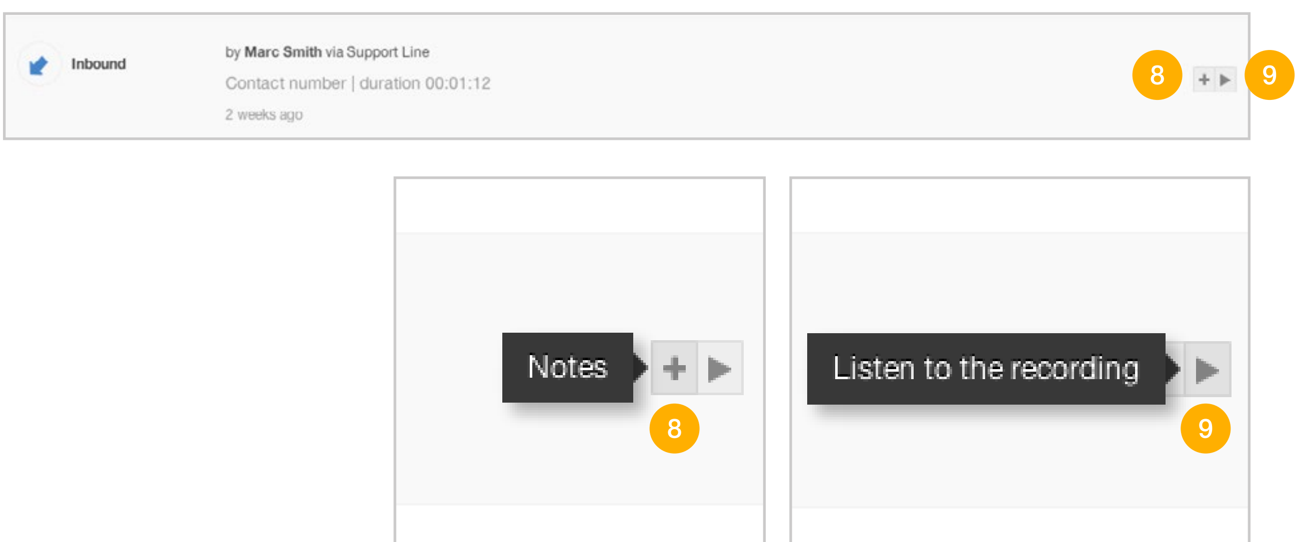
Talkdesk **stores** every **interaction** that a customer has with your company in one place: the contact's "ACTIVITY" tab. 7



You will see inbound and outbound calls, voicemails, chat transcripts, tickets, cases, notes, etc. from this contact. **Talkdesk also pulls information from other business tools you are using** (i.e. Salesforce, Zendesk, Olark, SugarCRM, ZoHo, Highrise, Desk.com, etc.) and **puts** this **information** in the "ACTIVITY" tab.

Voice interactions can have notes and a record associated that you can review:

- // ***View*** more information about each interaction just by ***clicking*** on the "+" button. 8
- // ***Open*** the interaction in the origin system by ***clicking*** on "LINK" button. 9

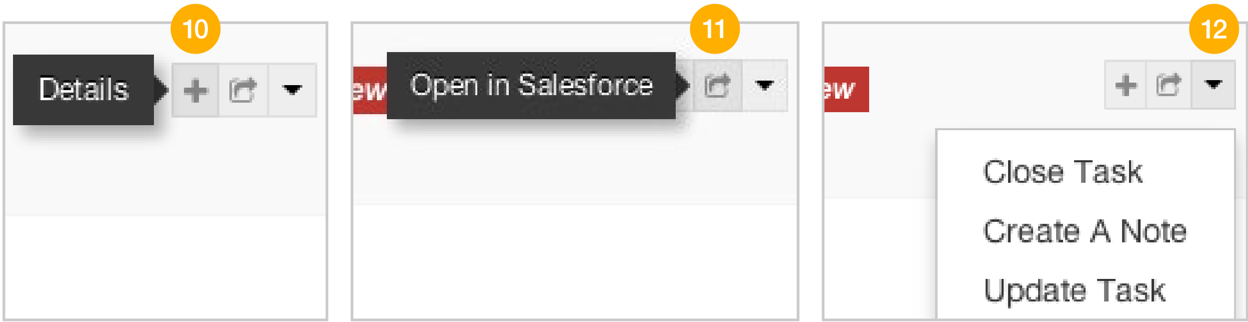


Interactions displayed from an external system can have several options associated:

// ***View*** more information about each interaction just by ***clicking*** on the “+” button. 10

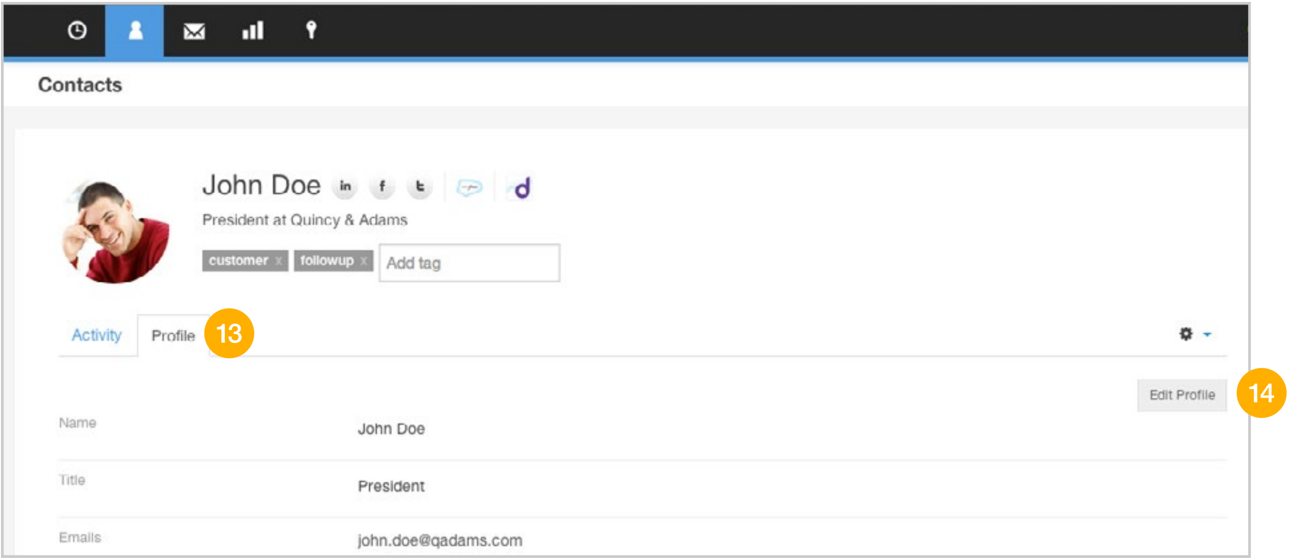
// ***Open*** the interaction in the origin system by ***clicking*** on “LINK” button. 11

// ***Edit***, ***update*** or ***execute*** other actions on this interaction in the origin system (this option may not be available). 12



4.4 // Contact Profile

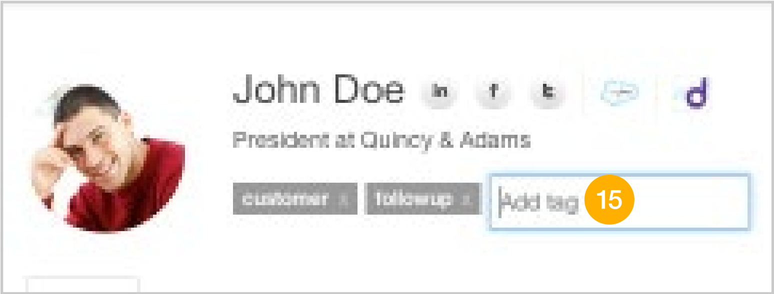
Talkdesk stores all of the **contact's information** like their phone number, email, company, address, etc. in their "**PROFILE**" tab. 13

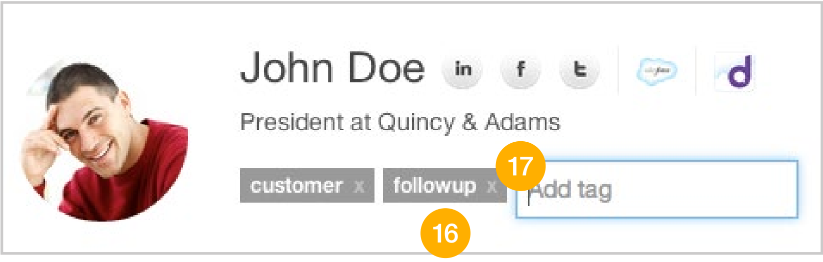


If you would like to edit any of this information, ***click*** the "**EDIT PROFILE**" button. 14 Enter the information into each field and ***hit*** the "**SAVE**" button at the bottom of the screen. Once you edit or update any information within the contact's profile tab, their **updated information will be available to all other agents on your team**.

4.5 // Managing Contact Tags

If you would like to ***add*** a **disposition code** (i.e. "HOT LEAD", "PROSPECT", "VIP CUSTOMER", etc.) or **summary code** ("REQUESTED CALLBACK", "INTERESTED IN T-SHIRTS", etc.) to the contact, ***open*** the **contact profile** and ***type*** in the **tag** into the box labeled "ADD TAG". 15





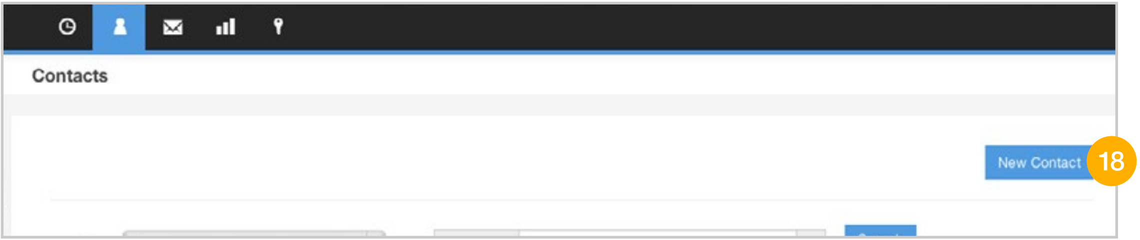
Once you ***hit*** enter, the **tag** will be added next to that box. 16

4.6 // Removing a Tag From the Contact

To **remove a tag** from the contact, ***open*** the **contact** and ***click*** on the "x" on the tag box. 17

4.7 // Creating a New Contact

To create a new contact within Talkdesk, ***click*** on the "CONTACTS" tab on the top bar. Next, ***click*** on the "NEW CONTACT" button. Then **fill out all of the contact's information** and, ***click*** "SAVE". Once you click "SAVE", all of the **contact's information will be up to date in Talkdesk.** 18



4.8 // Deleting a Contact From Talkdesk

To **delete a contact** from Talkdesk, find the contact by searching for it in the "CONTACTS" tab. ***Open*** the contact by clicking on their contact information (either name or phone number). Then, ***click*** on the "SETTINGS" button and ***select*** "DELETE CONTACT". 19

Make & Receive Calls

5

// Now that you have had a general overview of how Talkdesk works, below is information on how to make and receive calls. //

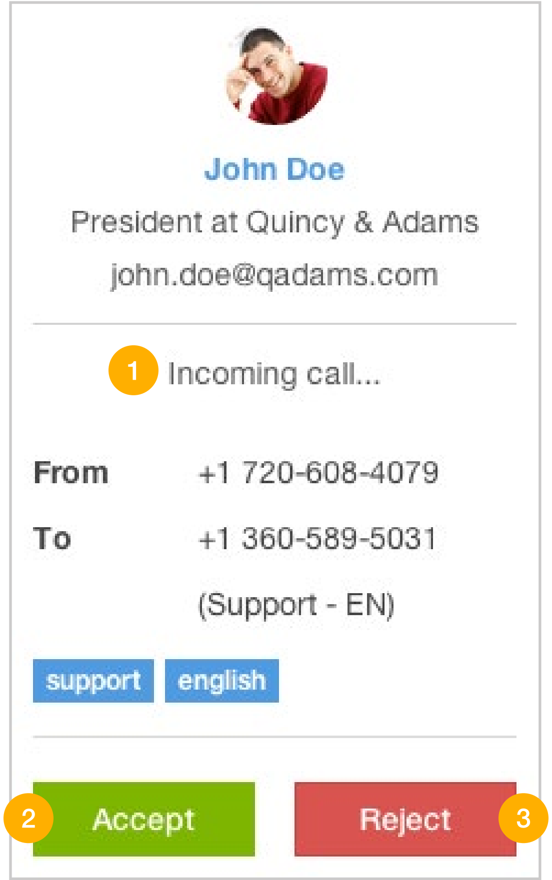
5.1 // Using the Browser

Talkdesk works completely in the browser (we strongly recommend Google Chrome). So all you need to talk with customer is a **HEADSET**. Plug it into your computer and you will hear the phone ring when a call is coming in.

5.1.1 // Receiving Calls

When a call is coming in, in addition to hearing the phone ring, you will see which **customer is calling on the right sidebar**.

If you have *Desktop Notifications* enabled, you will also see a **screen pop** letting you know that you have an **incoming call**. 1
NOTE: your administrator has to **decide** whether or not to activate *Desktop Notifications* for you and your team.



If you would like to **take the call**, ***click*** on the "ACCEPT" button on the right hand side bar. 2 If you are busy and **cannot take the call**, ***click*** on the "REJECT" button. 3

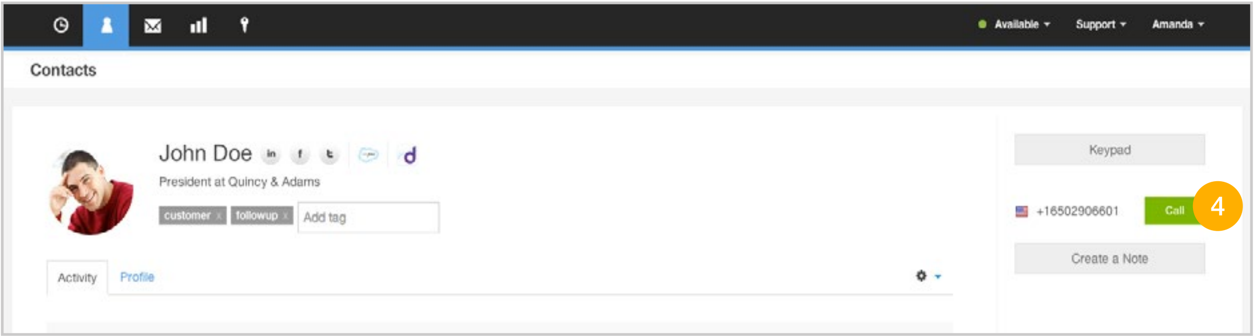
Your administrator will **configure your voicemail and routing settings**, so you don't have to worry about where the call goes if you decline it.

It can go to other agents if there are any available or it can go to voicemail.

Once you have finished the call, **Talkdesk will automatically add the call details from that call to the Contact's profile.** If the caller was sent to voicemail, the voicemail recording will also be added to their call activity tab within their profile.

5.1.2 // Calling an Existing Contact

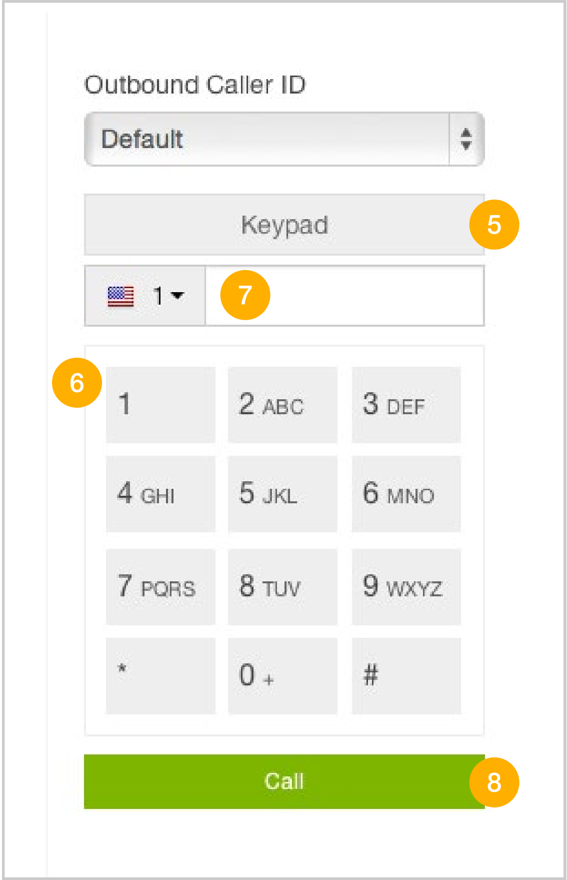
To call a contact that exists within Talkdesk you can click on any phone number or contact name within Talkdesk to open the contact's profile. Once you click on the contact, their phone numbers will show on the right hand call bar. ***Click*** "CALL" 4 next to the phone number you would like to call and you will **immediately hear their phone ringing** and the call control functions will appear.



To finish the call, ***hit*** the "END CALL" red button. Once you have finished the call, **Talkdesk will automatically add the call details** (as well as the record if it is enabled for your account) to the contact's activity tab within their profile.

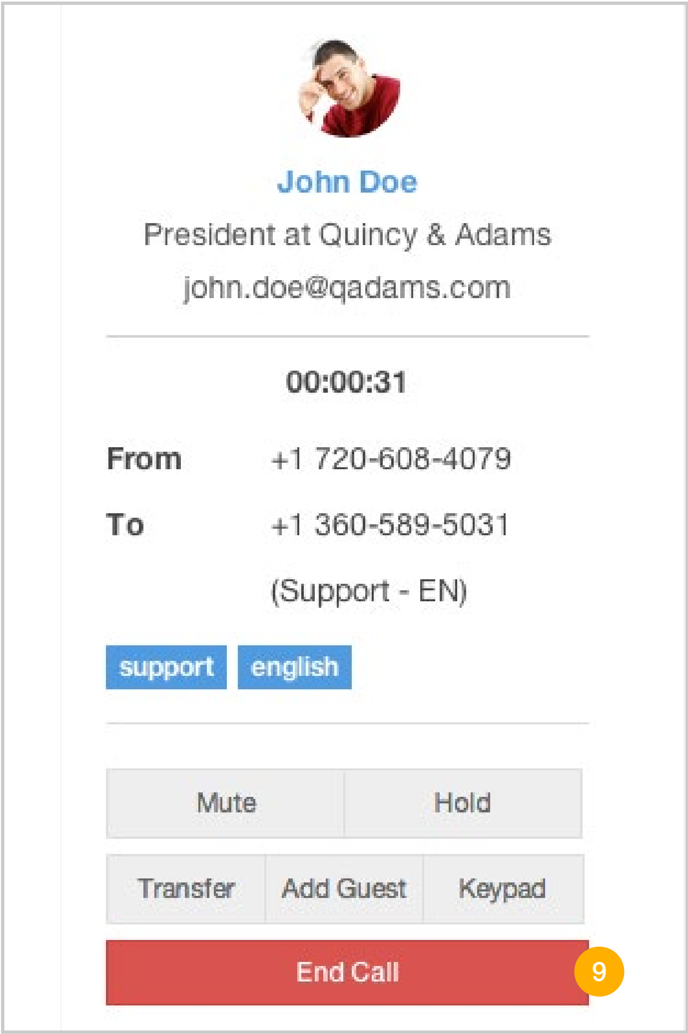
5.1.3 // Calling a New Contact

If you want to call a new contact, you can ***click*** on the "KEYPAD" button 5 on the right hand side of your Talkdesk. Once you click the "KEYPAD" button, you will ***see*** a telephone keypad. 6



You can either **type in the phone number** here or **copy the number and paste** it in the text box. 7 Once you have entered the number, ***click*** "CALL". 8 The keypad will be replaced with the call control functions. To finish the call, ***hit*** the "END CALL" red button. 9

Once you have finished the call, **Talkdesk will automatically add the details** of the call to the call log.



5.2 // Using Your Cell Phone or Landline

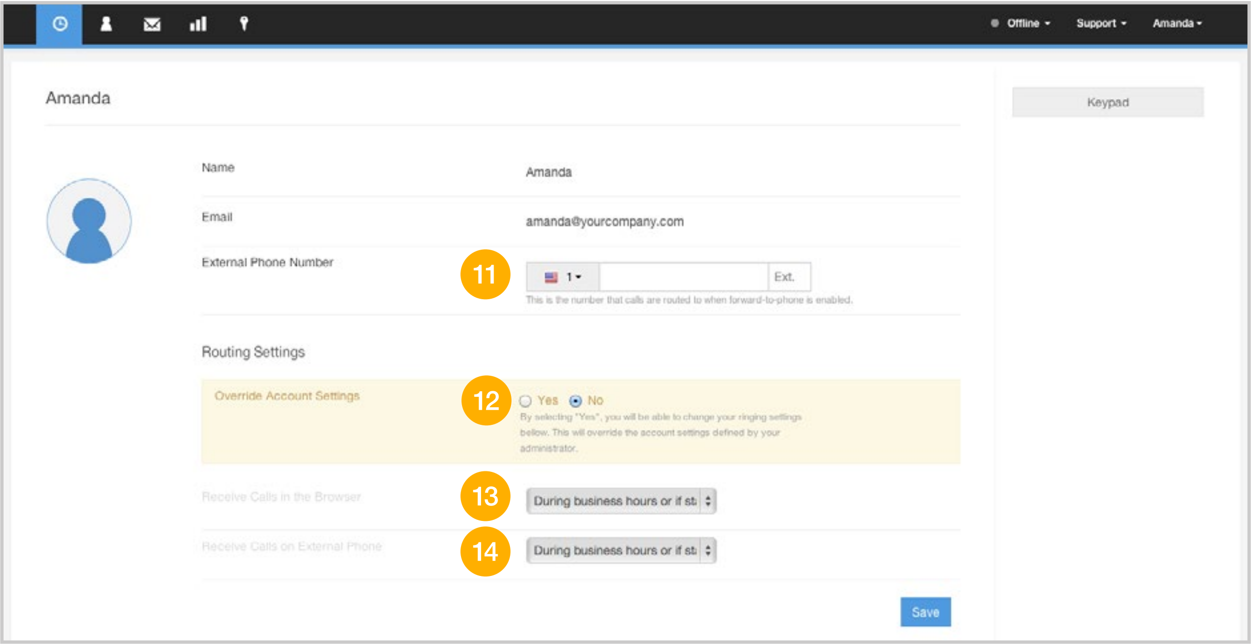
This function will **allow you to take calls wherever you are**, even when you're not at a computer. If your administrator has configured Talkdesk to **forward calls to your mobile phone**, you can review and adjust your settings.

You can decide if you would like to take calls from your phone instead of the Talkdesk interface when you are logged in, outside of business hours, or whenever it's convenient for you.

To adjust your forward to **phone settings**:

// ***Click*** on your **name** on the top menu and ***select*** "**SETTINGS**" from the dropdown. 10

// ***Type*** in your **mobile phone number** in the "EXTERNAL PHONE NUMBER" box. 11 You might add extension line if you use your work phone number.



By default calls are being forwarded to your external phone (mobile phone or landline) as per your administrator configuration. You may want to override these settings, but please do it carefully.

// In the *Routing Settings* section, ***select*** "YES" 12 if you want to *Override Account Settings*. This will allow you to override the settings defined by your administrator and **change your routing settings**.

// ***Adjust*** the option for "RECEIVE CALLS ON EXTERNAL PHONE" 13 as you wish (we would recommend "OUTSIDE OF BUSINESS HOURS" 14 if you are in charge of the company's hotline or if you are expecting calls).

5.3 // Call Workflow

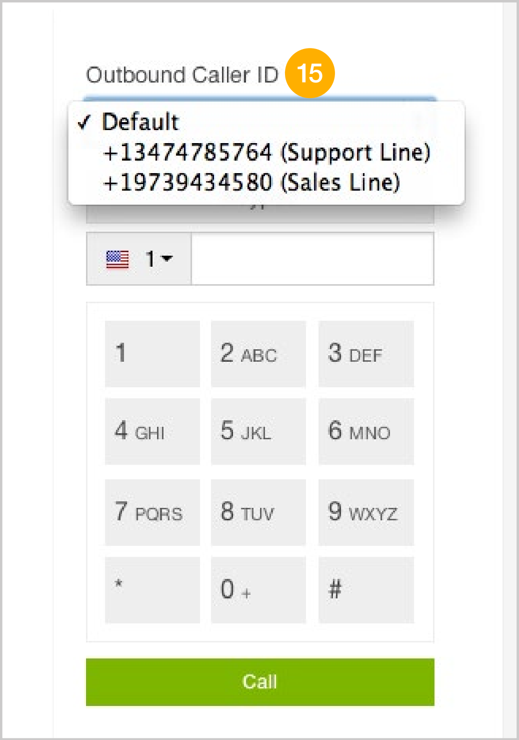
5.3.1 // Selecting the Outbound Caller ID

With Talkdesk, if your administrator has enabled the custom outbound caller ID, you can **choose which phone number to display** as the caller ID of the person you are calling.

Once the custom caller ID has been enabled, **a dropdown menu will appear in the call bar**.

To choose your **outbound caller ID**, simply ***choose*** the **number** 15 from this dropdown menu.

Once a phone number has been selected, it will be used for all outbound calls until the outbound caller ID phone number is



changed or the "DEFAULT" option is selected (in this case Talkdesk automatically determines the best number to use based on the phone number you are calling).

5.3.2 // Using Call Control Functions

As soon as you place a call, you will **see this call control panel**:

// Contact name or phone number 16

// Contact image 17

// Duration of the call 18

// The phone number you are calling from 19

// The phone number you are calling to 20

// Mute the call 21

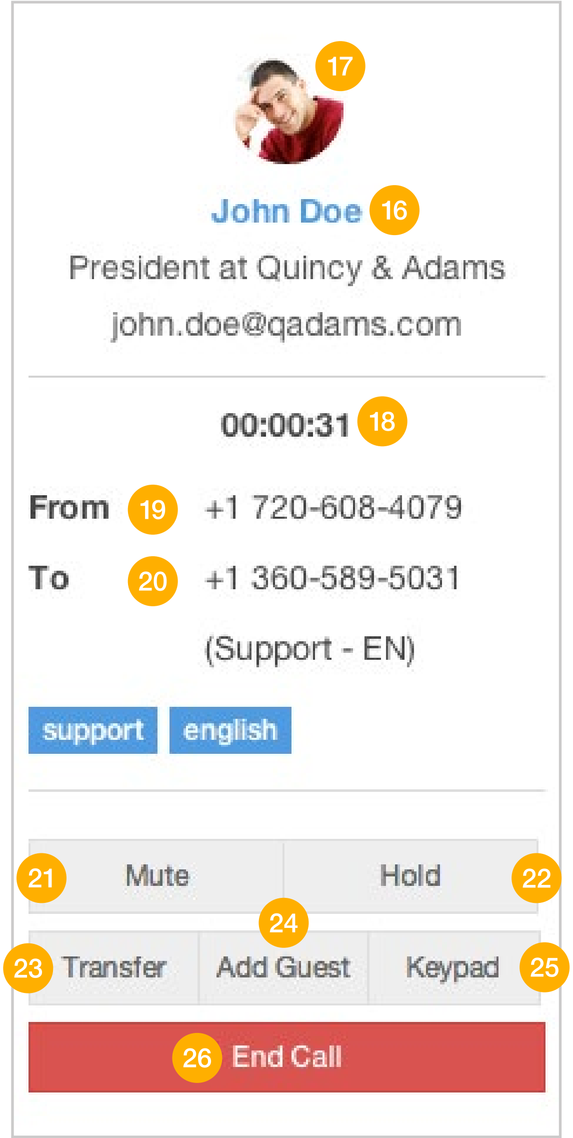
// Place the call on hold 22

// Transfer the caller to another agent or manager 23

// Add a caller, agent or manager 24

// Open the keypad 25

// End the call 26



Below are some of the things you can do while the caller is on the phone, **using these call control functions**.

5.3.3 // Mutting the Call

If you would like to **mute the caller**, ***click*** the "MUTE" 27 button. When a call is on mute, the caller cannot hear you but you can hear them.

5.3.4 // Placing a Customer on Hold

You can **place a call on hold** by ***clicking*** the "HOLD" button. 28 When a call is on hold, the caller cannot hear you and you cannot hear the caller.

5.3.5 // Call Transfer

If you would like to **transfer a caller** to another agent or your manager, ***click*** on the "TRANSFER" button. 29

You will then see the two possible options for call transfers and a screen that will show you each agent on your team and whether or not they can receive calls.

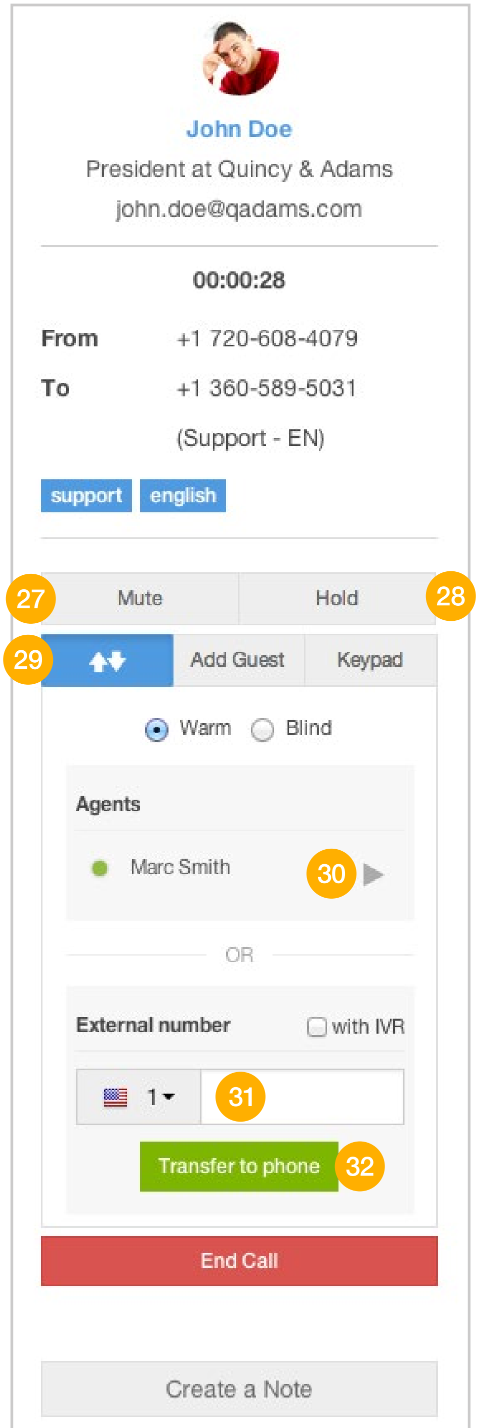
// Agents that are logged in and are **available** to receive calls will have a green dot next to their name.

// Agents who have **forward-to-phone** enabled will have a gray dot next to their name. They **may or may not be free** to answer the call.

// Agents who are **busy**, not logged in or **cannot receive calls** will not be listed.

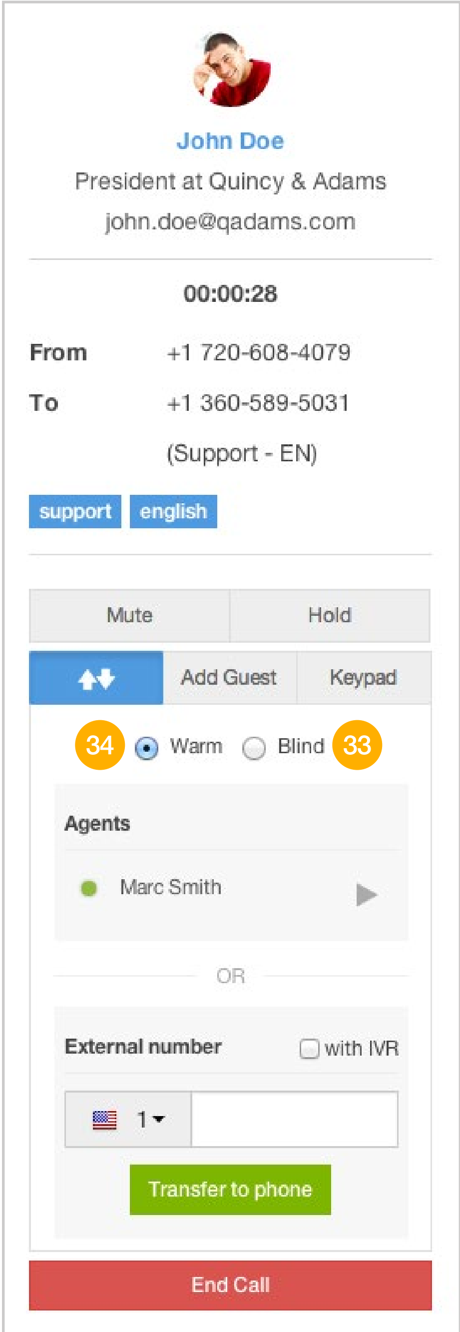
First of all, **decide how you would like to transfer the call**. There are two possible options, blind and warm transfers (details below).

Then, decide **which agent to transfer the call** to and click on the arrow next to their name. 30 You can also ***type*** in a **phone number** to transfer the call to in the box labeled "EXTERNAL NUMBER". 31 After you enter the phone number, ***click*** the "TRANSFER TO PHONE" button. 32



// Blind Transfer

A blind transfer is when you **transfer the caller to another agent** without speaking to the new agent first. Follow the steps above to transfer a call to an agent, and then once the new agent accepts the call, the call will be dropped on your end. Using this option, once you click the arrow, **the agent that you selected will hear their phone ring** and can accept the transfer. 33



// Warm Transfer

A warm transfer is when you **speak with the new agent before the call is transferred**. You can tell the destination agent about the caller's issue and give any background information before transferring the call (without the caller hearing). 34

Then all three parties (you, the other agent and the caller) **can speak together**.

Once you click the arrow or enter the phone number of the agent you are transferring the call to, **the agent that you selected will hear their phone ring** and can accept the transfer.

// Once you reach the new agent, you can **speak with them for as long as you would like**, without the caller hearing.

// Once you are ready to transfer the caller to the new agent, ***click*** on the "ADD CUSTOMER TO CALL" button and you will now be in a **three-way conference call** with the new agent, the caller and yourself.

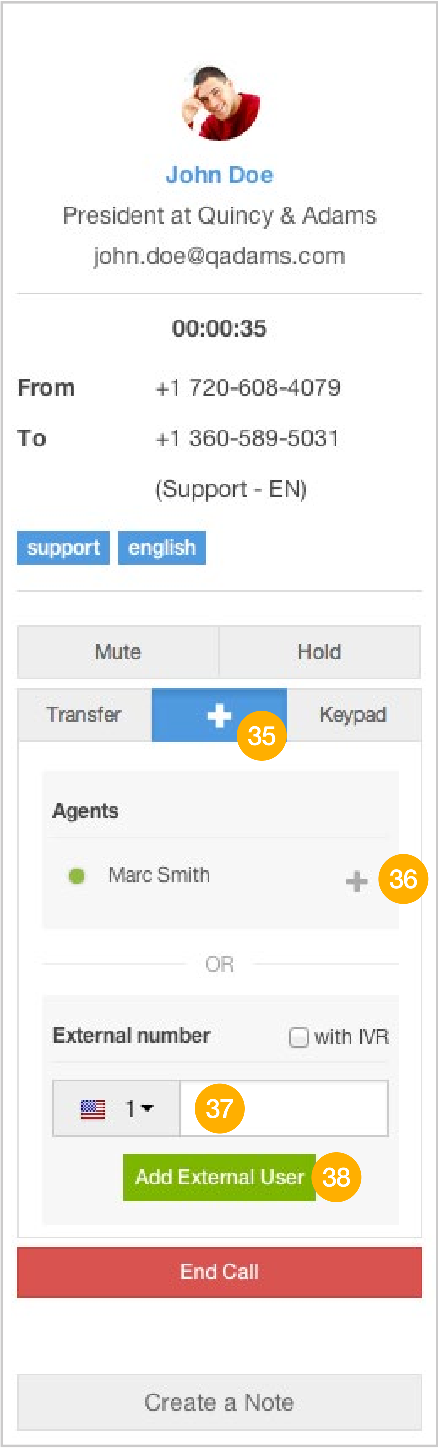
// You can introduce the caller, speak with both the caller and the new agent and then when you would like to hang up from the conference call, ***hit*** the "END CALL AND COMPLETE TRANSFER" button. **The caller will then be on the line with the new agent.**

5.3.6 // Call Conferencing

Call conferencing allows you to **add guests to a call**. A guest can be another agent, a customer/prospect/lead or a manger.

If you would like to ***add*** one or more **guests to the call** for a conference call, ***click*** the "ADD GUEST" button with the caller on the line. 35 Your keypad will then look like this:

You can ***add*** an **agent or manager** to the call by ***clicking*** on the "+" next to their name. 36 You can also ***add*** a person who is **not an agent** by ***typing*** in their **phone number** in the box below "EXTERNAL NUMBER" 37 and ***clicking*** "ADD EXTERNAL USER". 38 If you added an **external phone number to the call**, their phone will ring and when they answer, they will join the call automatically.



5.3.7 // Merging a Call With Another Contact

When you are speaking with a contact who is in your system but has called from a different phone number or does not have a phone number associated with the Talkdesk profile, **you can merge this new information with their contact information** that is already in Talkdesk.

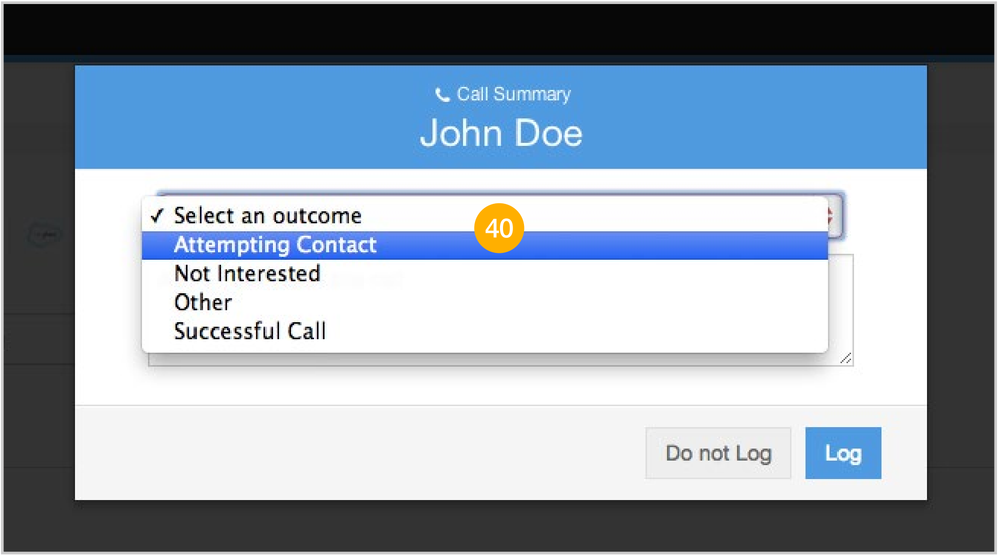
While they are on the phone, **search for the contact** that you would like to merge (you can do it from the contacts section). ***Open*** this **new contact** and then ***click*** on the "MERGE IN-PROGRESS CALL" button. 39

Talkdesk will automatically merge the call that is in progress with the contact you selected.

5.3.8 // Call Dispositions and Notes

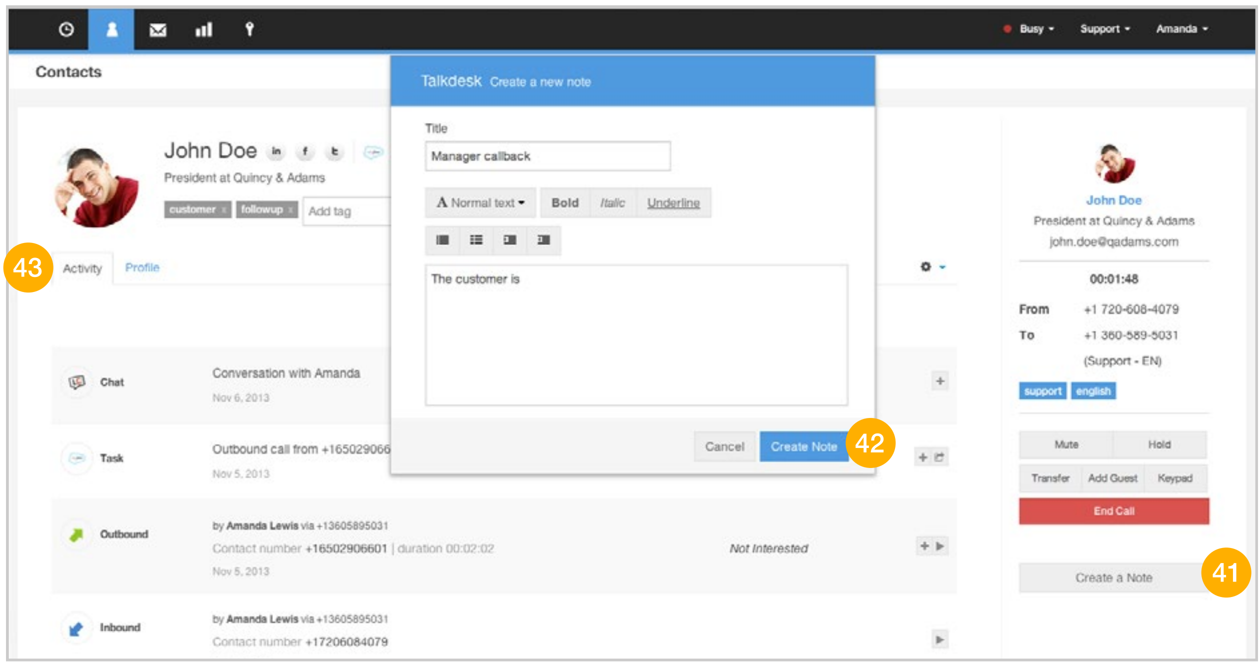
After a call has finished there will be a **popup on the screen** that will allow you to ***select*** a **call summary** in the dropdown menu predefined for your account by your administrator. For example, you may select "LEFT VOICEMAIL", "WRONG NUMBER", "FOLLOW UP IMMEDIATELY", "DISCONNECTED NUMBER", etc. 40

You can also add a note about the call on this screen. This information will be **displayed on the call summary** under the "ACTIVITY" tab in the contact's profile. It will **keep your entire team on the same page** and allows for a quick overview of previous conversations when you are on the phone with the customer.



5.3.9 // Adding Notes on a Call

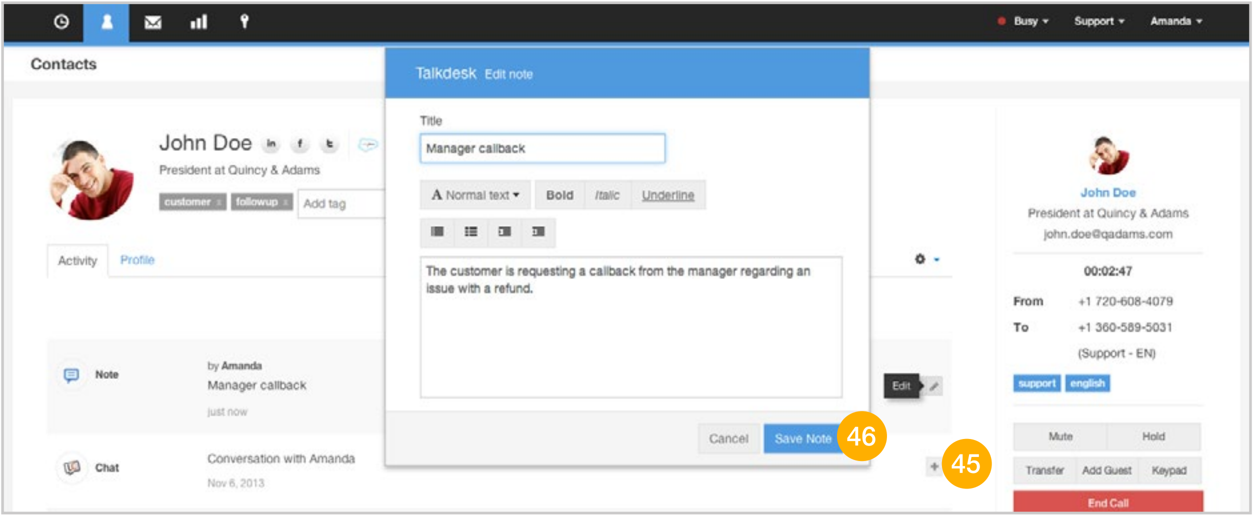
Adding a note to a caller's interaction history is an easy way to **keep your entire team informed about something important**. They are also helpful when transferring calls, as the next agent will have relevant information about the caller, before they answer the phone.



To ***add*** a **note** while the caller is on the phone, ***click*** the "**CREATE A NOTE**" button. 41

As soon as you ***hit*** the "CREATE A NOTE" button, 42 the note will be ***added*** to the "ACTIVITY" tab in the contact's profile. 43 You can ***see*** the **details of the note** by ***clicking*** on the "+" icon next to the note. 44

You can ***edit*** or ***delete*** the **note** by ***clicking*** on the **pencil icon** next to the note. 45 ***Change*** the **content of the note** and then ***click*** the "SAVE NOTE" button. 46



Depending on the systems you have connected with your Talkdesk account, **you can also add interactions** (notes, cases, tickets) on external systems directly from the Talkdesk interface.

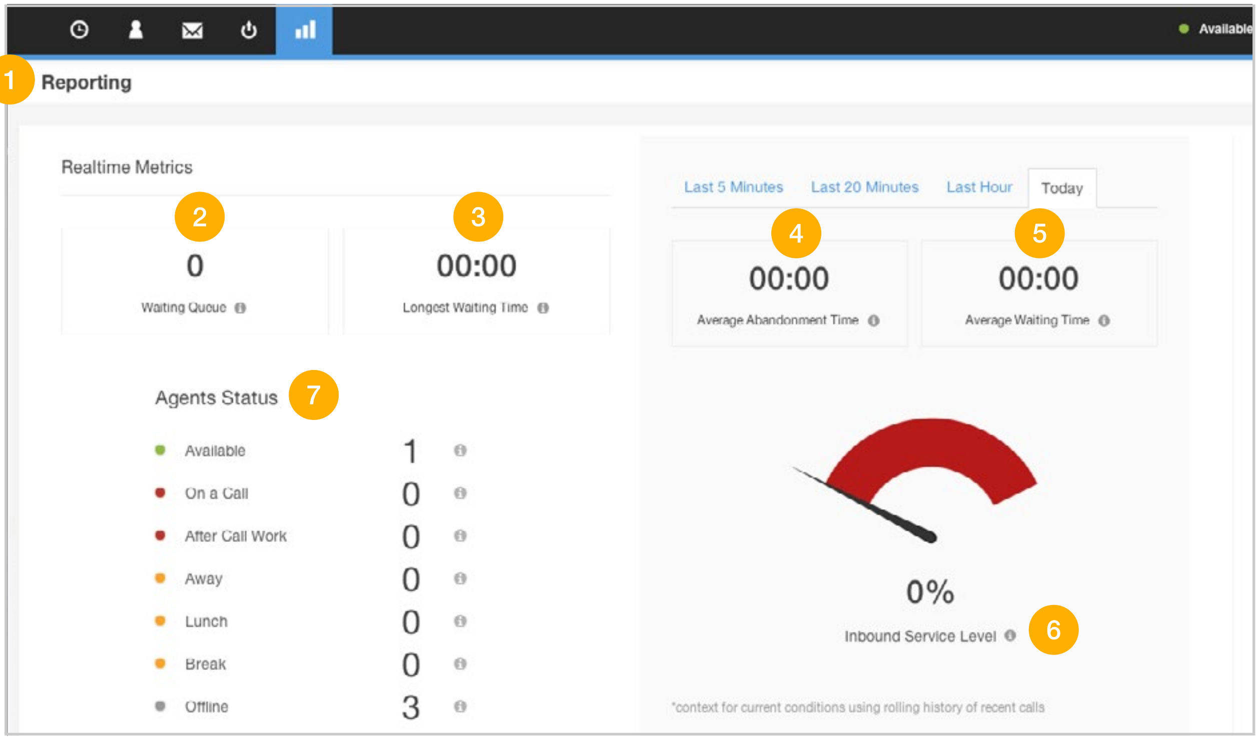
Reporting

6

The "REPORTING" tab has all of the **information** you need to know about how you and your **team are performing.** 1

6.1 // Real Time Statistics

You can have an **overview of calls and the most recent metrics**, as well as agent information (how many agents are answering calls).



Waiting Queue › this ***displays*** the current **number of callers** in the waiting queue. 2

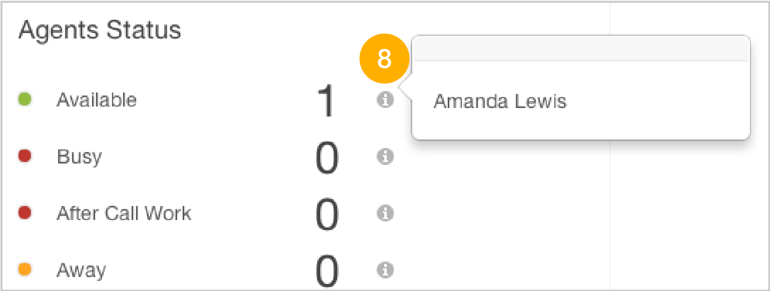
Longest Waiting Time › this ***is*** the **length of time** that the longest **waiting caller** has been in the queue. 3

Average Abandonment Time › this ***is*** **how long** it takes, on average, for customers to **hang up** in the waiting queue (and not reach an agent). 4

Average Waiting Time › this ***is*** **how long** customer are waiting, on average, to **speak with an agent**. 5

Inbound Service Level › this ***is*** the **percentage** of **calls answered** within a certain time frame. 6

Agent Status › this ***tells*** you **how many agents** on your team are available to **take a call**, **busy**, **away** from Talkdesk or offline. 7



By ***clicking*** on the 'I' icon, you can ***see*** which agents are available, busy, away and offline. 8

6.2 // Waiting Queues Status

Another thing you can ***see*** in the *Reporting* section is the **queue status** for the queues you belong to. 9 For each queue you can **see how many callers are waiting**, this way you can adapt your conversations according to your call center activity.

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Thanks and we hope you love using Talkdesk as much as we do!

Talkdesk is as powerful as an enterprise call center software with the simplicity and price of a business phone.

Feel free to contact us at ***support@talkdesk.com*** if you have any issues, suggestions or just want to **say hi!**

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