REVINATE

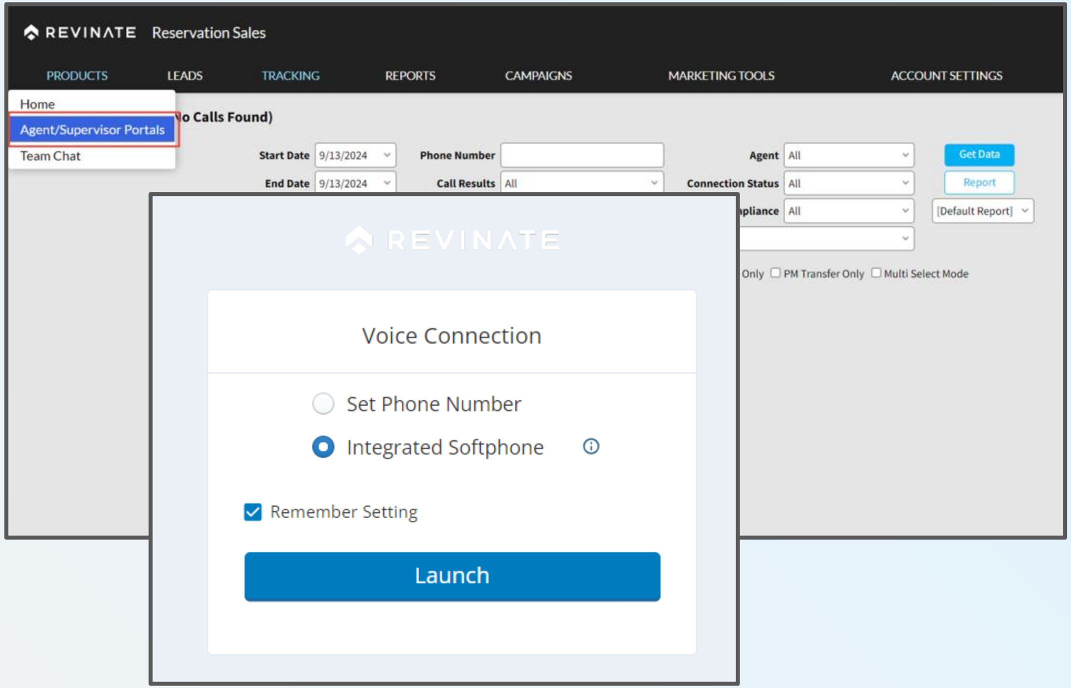
Agent portal

REVINATE

Agent portal

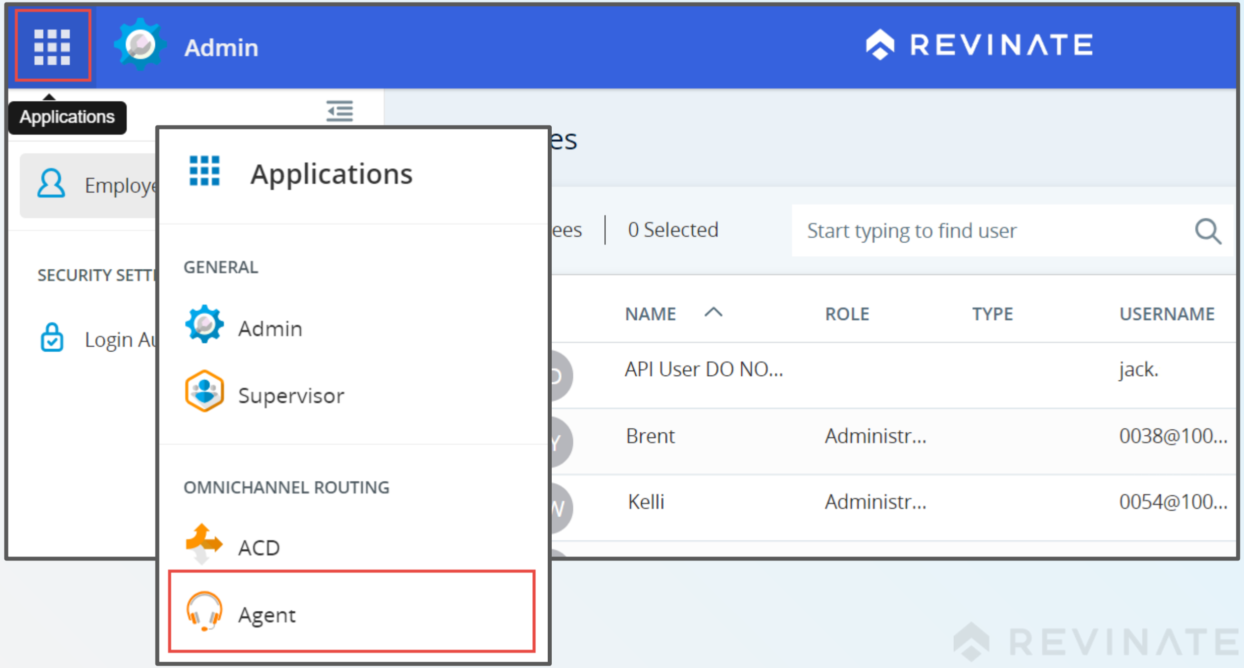
Launching agent portal

- Enter Reservation Sales, Select Products, Agent Portal
- Allow microphone if prompted
- Choose your voice connection:
  - If using a deskphone select: Set Phone Number
  - If using a USB headset select: Integrated Softphone



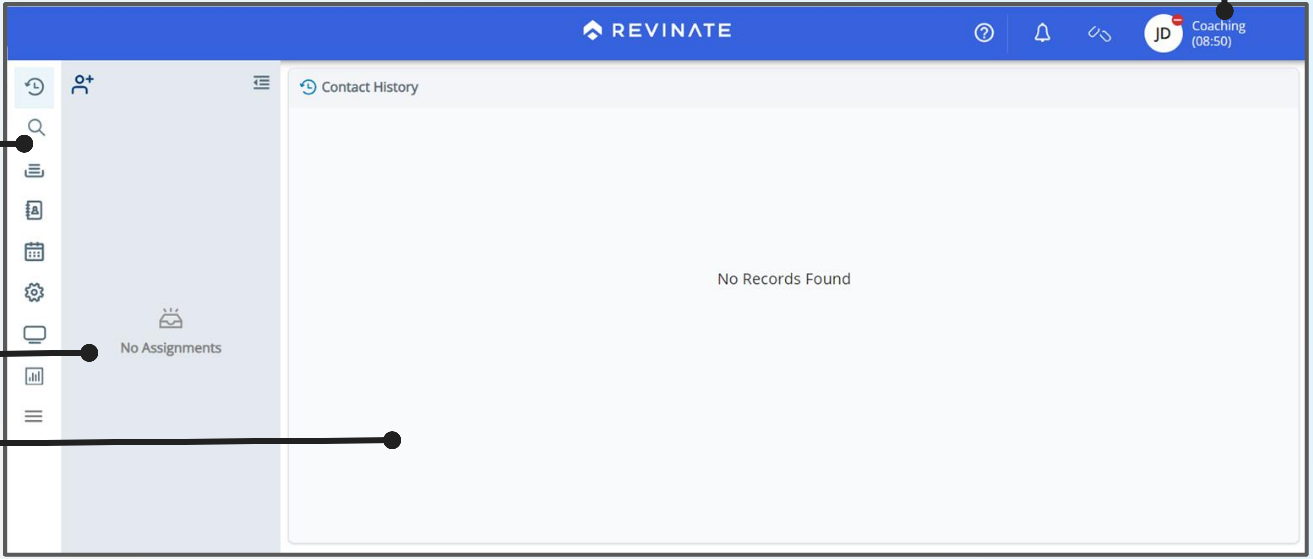
Accessing the dashboard

- Select the application icon in the top left.
- Select agent to access to portal to answer calls.



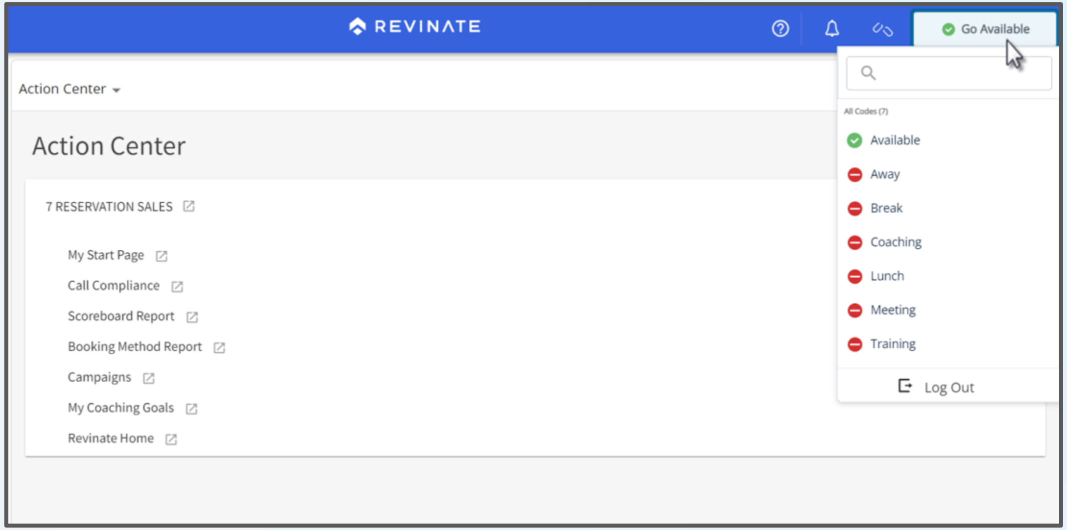
Agent portal dashboard

- Agent phone state
- The left icon panel is where you will find important tools.
- Gray panel is where you will find the voice control center when a call is delivered.
- Interaction panel



Agent phone state

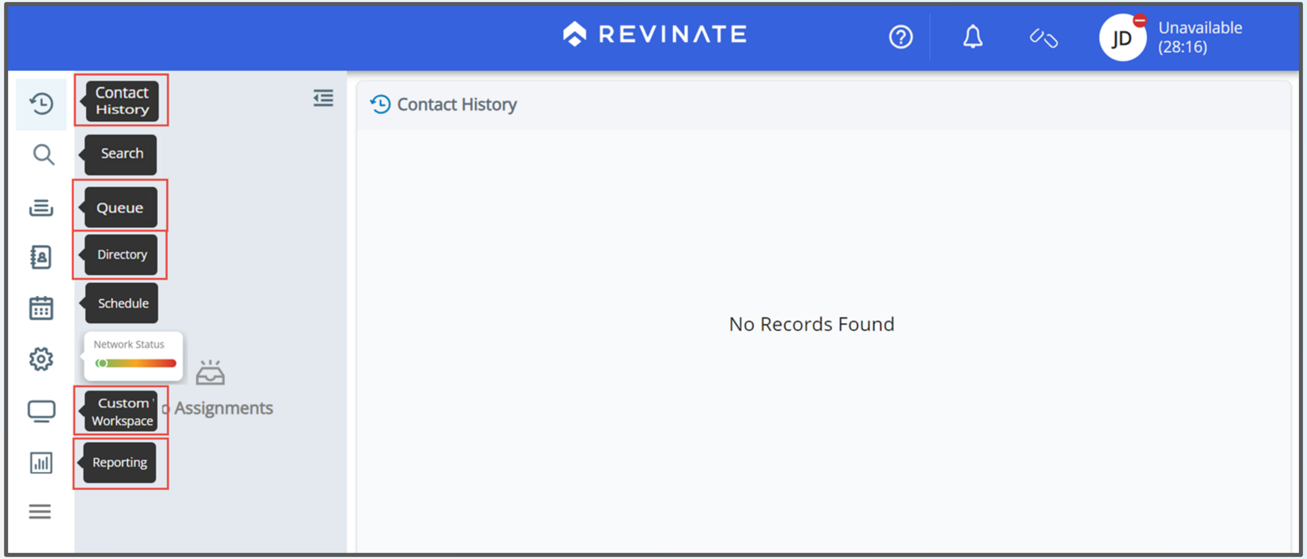
- Upon logging in, your phone state will be "unavailable."
- Hover over unavailable to choose the next phone state.
    - Available means you are ready to receive calls.
- The timer will show how long you have been in the state.



NOTE: To log out of the agent portal, agents must select log out from the dropdown.

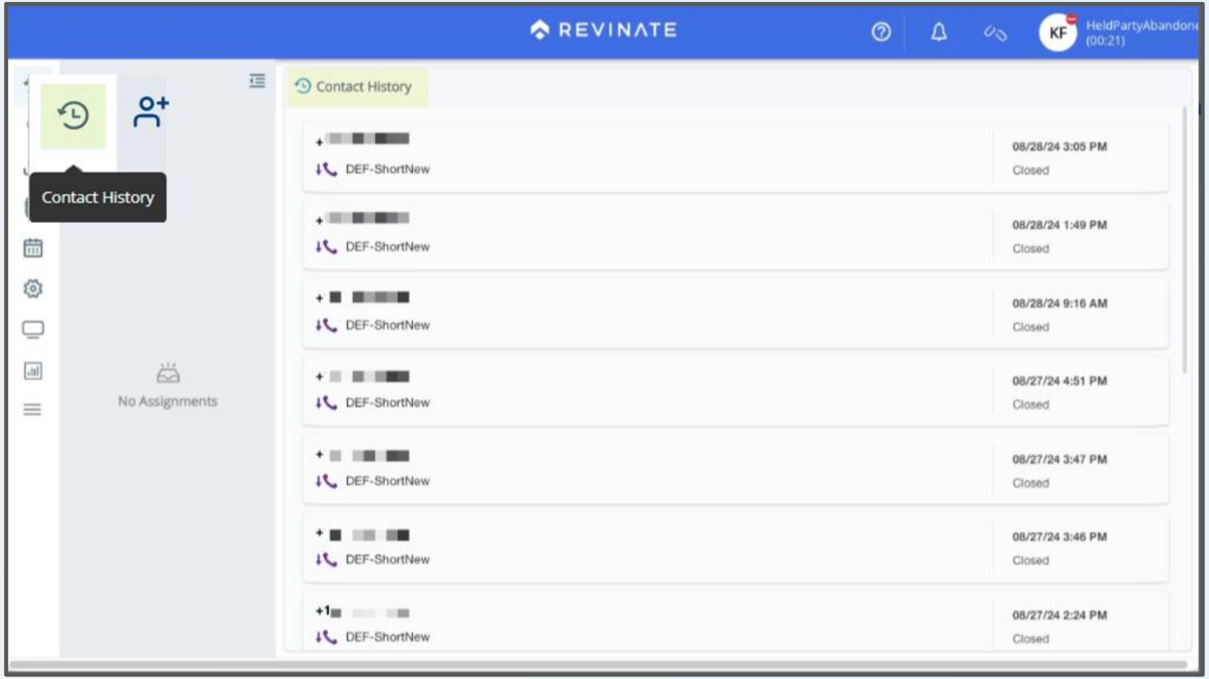
Icon panel

- The left icon panel is where you will find important tools.
- The red boxes indicate the priority icons you will interact with daily.



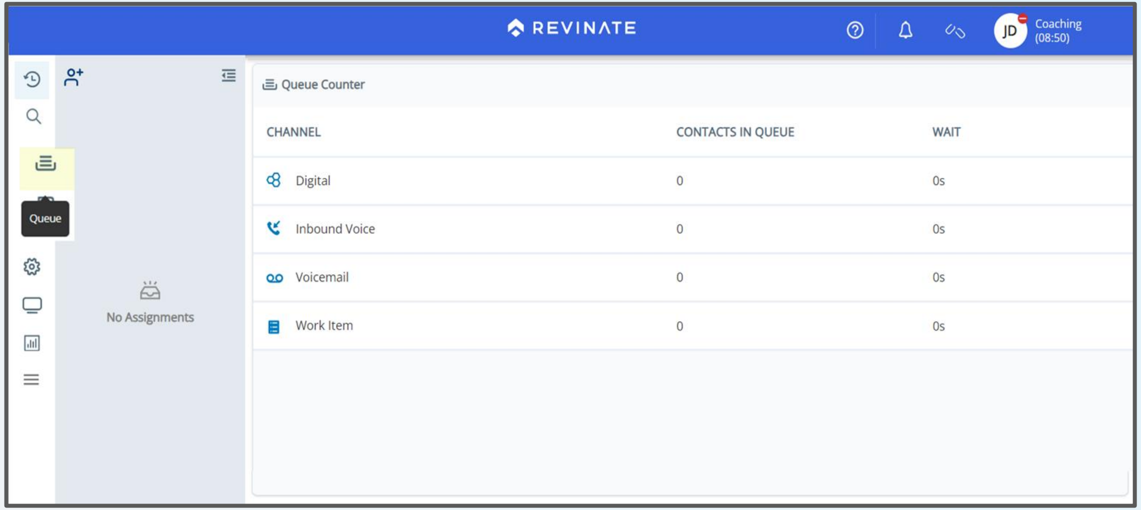
Contact History

- Call History displays the most recent interactions
    - inbound calls
    - outbound calls
    - voicemails



Queue

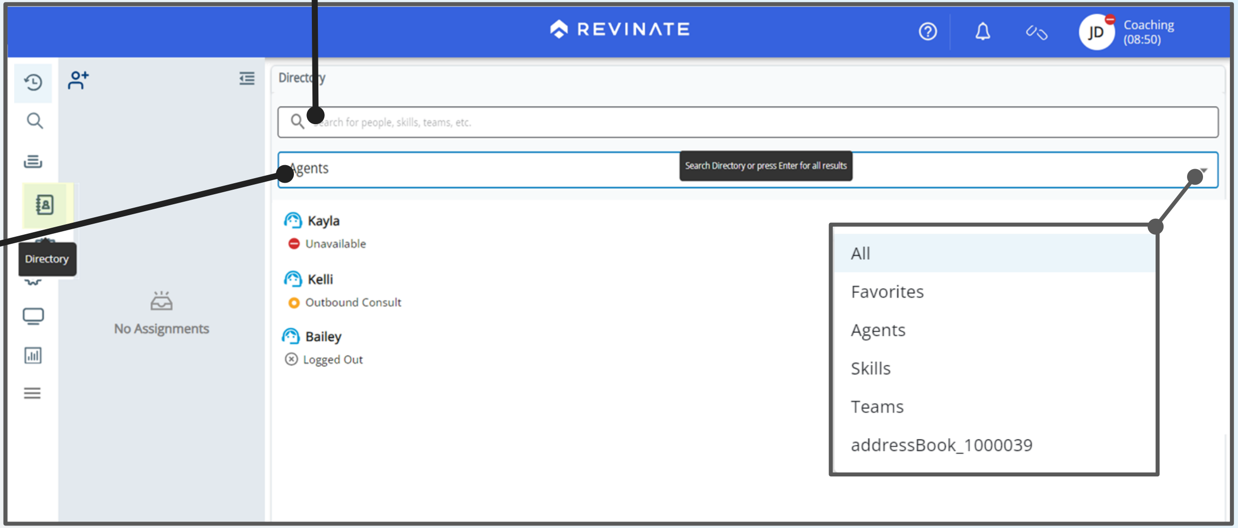
- Displays the number of calls in the queue.
- Wait will display the seconds for the longest call has been waiting.



Directory

- Contains contact information for property departments and other agents on your team.
- First select the dropdown to find contacts

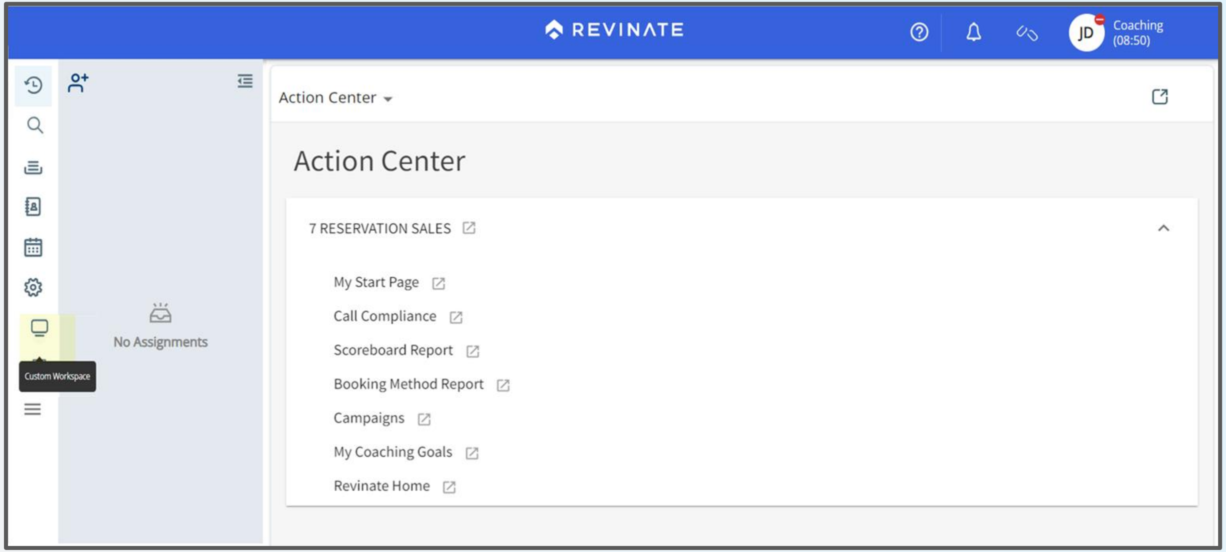
IMPORTANT NOTE: Once you have selected a contact list from the dropdown, you MUST press enter in the search box to allow the contacts to appear!



Custom Workspace

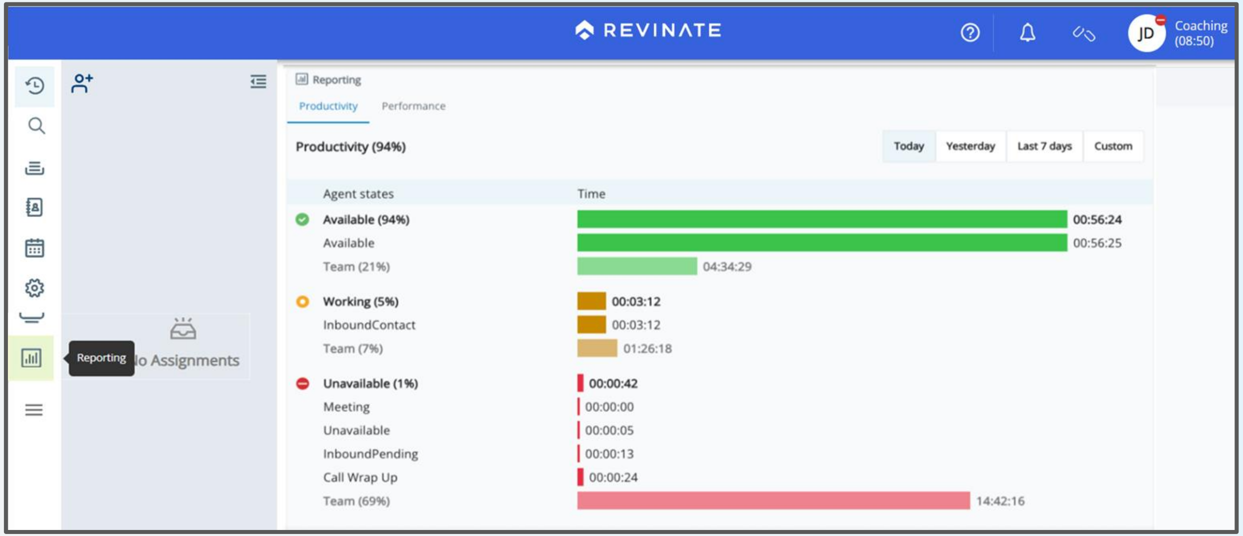
- Links to Reservation Sales for the agent start page and call compliance.

- Agent action center is located here:
  - Follow up leads
  - In-process leads
  - Attention leads



Reporting

- Displays easy access information for the agent to review their productivity and performance.

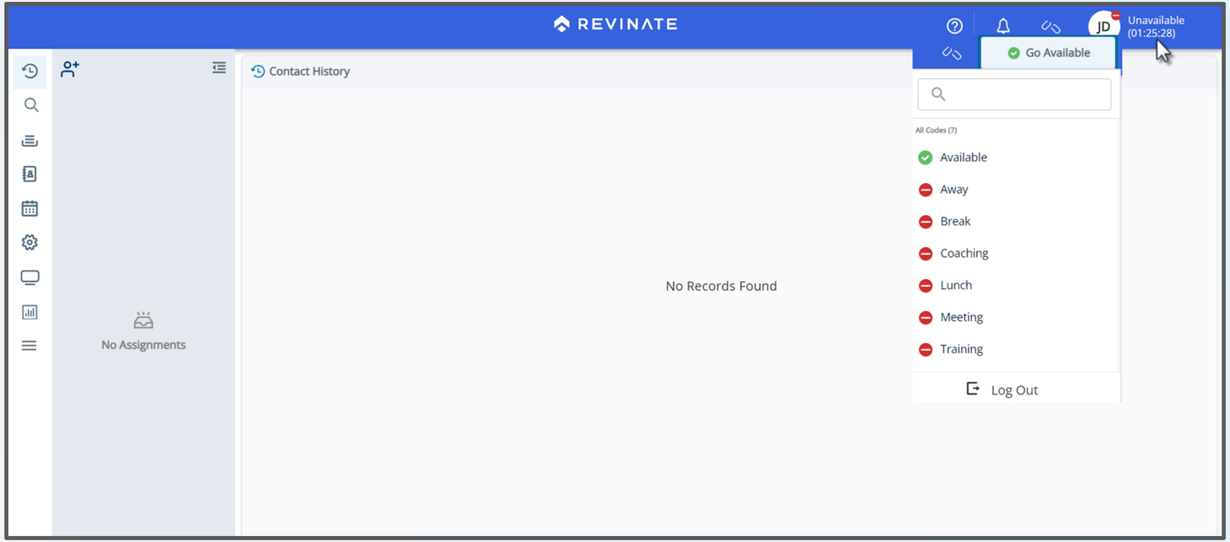


REVINATE

Inbound/Outbound Call

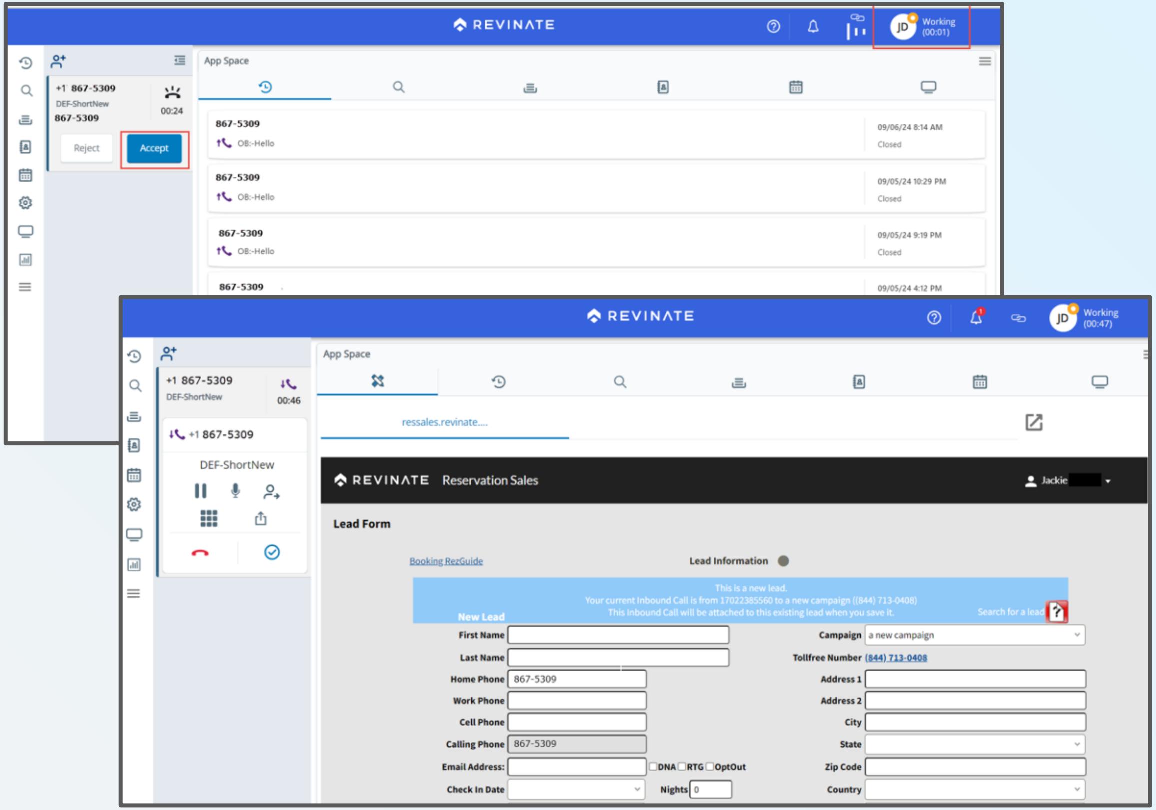
Changing agent phone state

- Hover over the initials in the top right.
- Agent must be in available to receive a call.



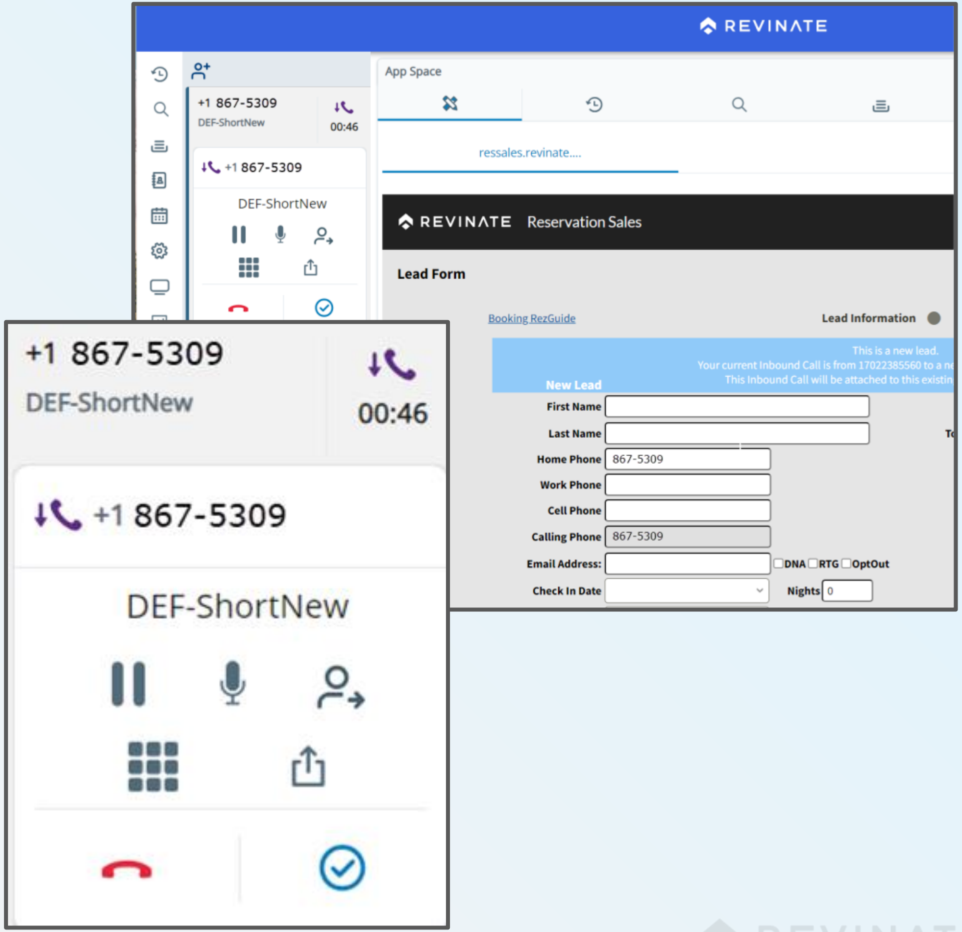
Incoming call

- When the call is delivered the agent will go into a working status.
- The voice control panel will also appear and the agent will need to select accept.
- Once the call delivers, you will see the lead form in the interaction window or it can pop out into a new tab.



Voice control panel

- This where the agent will handle all of the call functions when speaking to a guest.
    - Hold - hold music plays
    - Mute - no hold music
    - Keypad - digit press
    - Launch - take payment & desk phone transfer
    - Hangup - disconnect the call
    - Outcome - call disposition



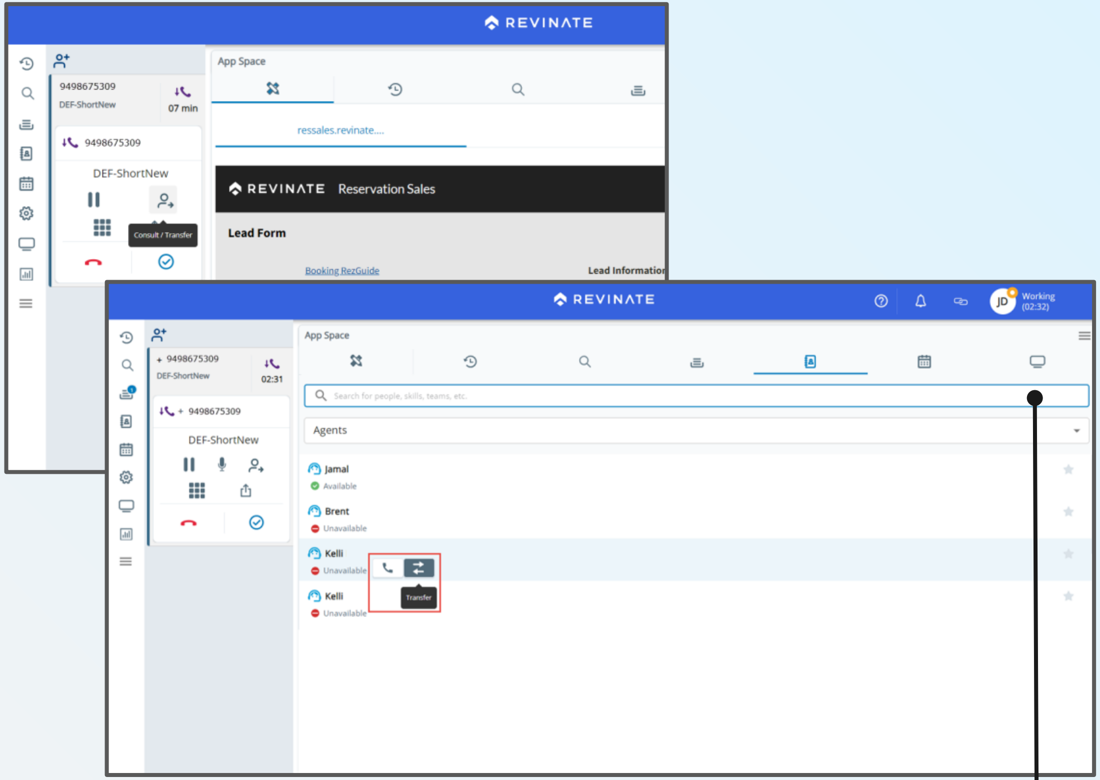
Consult/Transfer

Transferring a Call:

An enhanced feature that allows agents to consult with a different team member before transferring (warm transfer) or the agent can immediately transfer the call (cold transfer.)

- Select consult/transfer
- The directory will appear and select the person or skill from the dropdown

-  double arrow to cold transfer
-  telephone icon to warm transfer



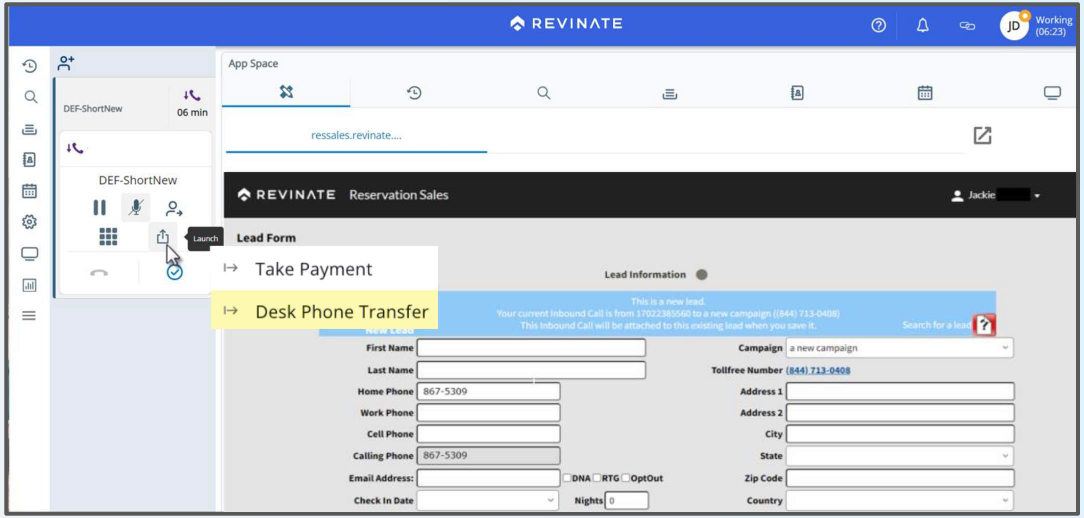
NOTE: You must hit the enter key in the search bar to populate the details of the directory selection.

Internal Transfer

Internal Transferring of a Call:

This will occur when you are transferring a call to a 3 or 4 digit extension from your desk phone.

- Select launch
- Select desk phone transfer
- Dial the extension into the phone on your desk

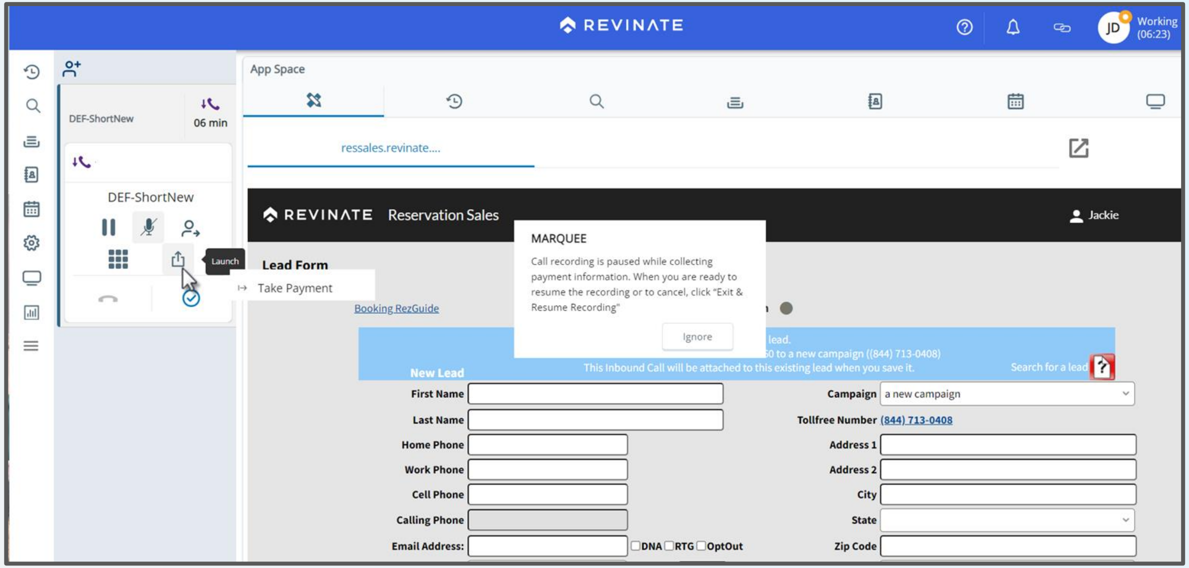


NOTE: You must select desk phone transfer for the call to transfer to the extension.

Taking payment

This process pauses the voice recording while taking payment from a guest.

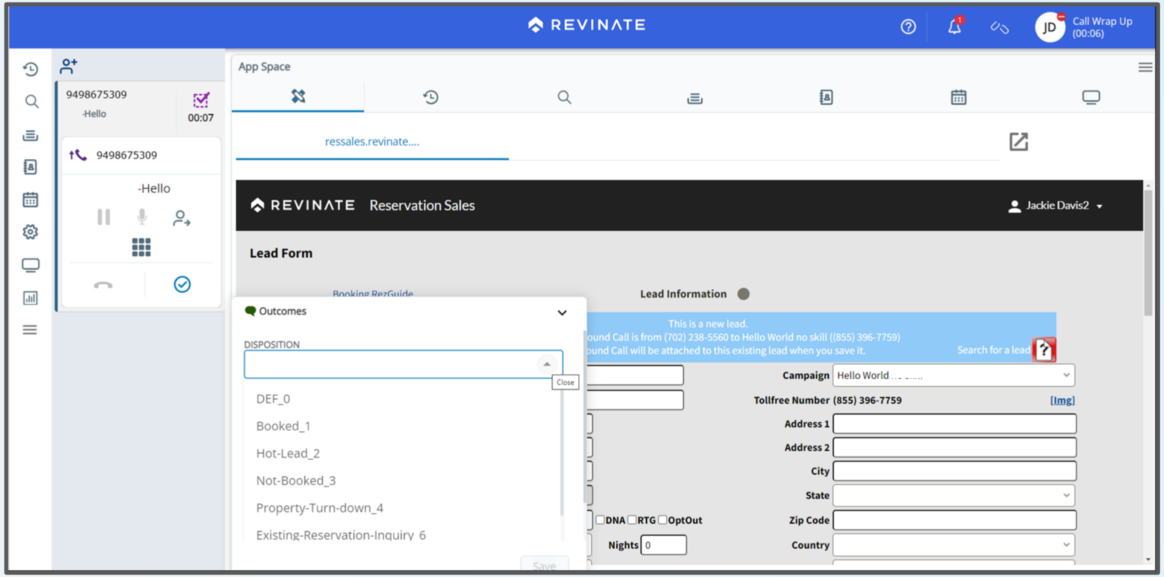
- Select the launch button
- Select take payment
- As seen the marquee message appears letting you know the recording is paused.
- Once payment is received you will select launch again and select exit & resume



NOTE: You **must** remember to resume the recording when done receiving the credit card information.

Outcomes | call dispositions

- The outcomes dropdown will appear once the caller has disconnected.
- Complete the lead form first before selecting the call disposition.
- When selecting a disposition the lead form will automatically close.

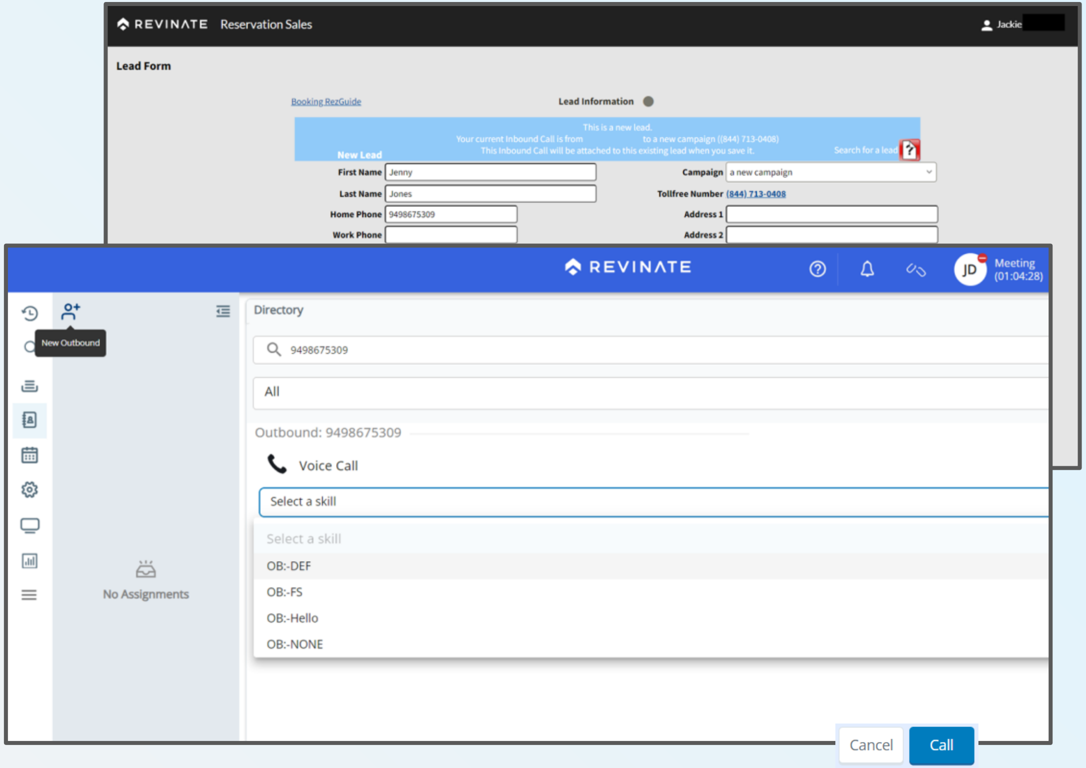


NOTE: Do not enter notes into the notes field of outcomes - this does not transfer to the lead form.

Outbound calling

When following up on a lead form, the agent will open the lead form from the action center and copy the phone number.

- Select the new outbound icon
- Paste the phone number in the search bar
- Select voice call and select a skill
- Select the call button to dial out



REVINATE

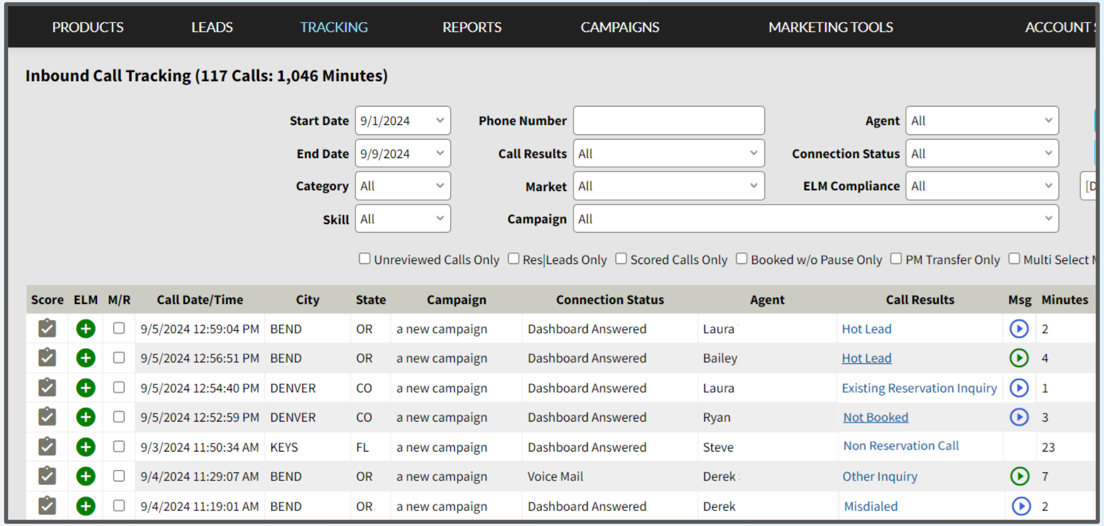
Listening to calls

Accessing call recordings

In Reservation Sales you will access the inbound call tracking report

- Select the play button for the call you want to listen to

- A new window for will open with the CXone Player



CXone Player

This enhanced audio player provides a more immersive playback experience.

- Interaction information is centralized for a cohesive overview at a glance.
- Timeline allows you to navigate and track the recording.
- Player icons are designed for ease of use and improved visibility.