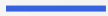




Agent portal





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

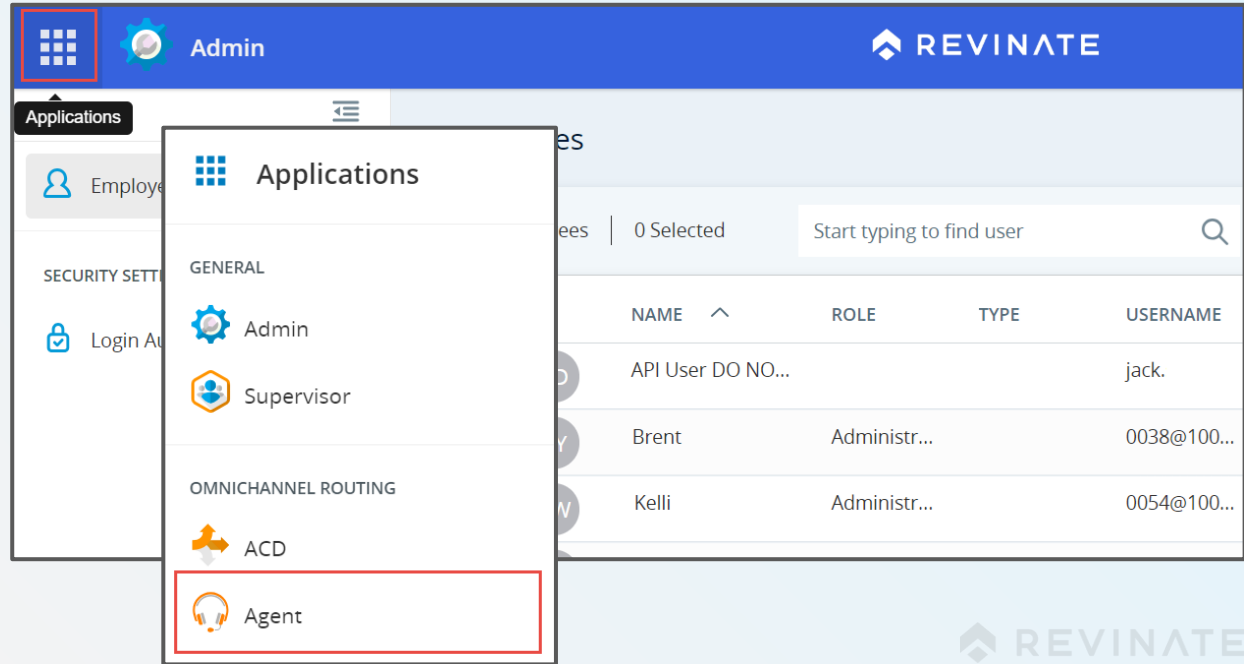
The screenshot displays the REVINATE Reservation Sales dashboard. The top navigation bar includes 'PRODUCTS', 'LEADS', 'TRACKING', 'REPORTS', 'CAMPAIGNS', 'MARKETING TOOLS', and 'ACCOUNT SETTINGS'. A dropdown menu is open, highlighting 'Agent/Supervisor Portals'. The main content area shows search filters for 'Start Date' (9/13/2024), 'End Date' (9/13/2024), 'Phone Number', 'Call Results' (All), 'Agent' (All), 'Connection Status' (All), and 'Compliance' (All). A modal window titled 'Voice Connection' is overlaid, featuring the REVINATE logo and the following options:

- Set Phone Number
- Integrated Softphone ⓘ
- Remember Setting
- PM Transfer Only
- Multi Select Mode

A blue 'Launch' button is positioned at the bottom of the modal.

Accessing the dashboard

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



The screenshot displays the Revinate Admin interface. At the top, there is a blue header with the Revinate logo on the right and the word "Admin" in the center. On the left side of the header, there is a grid icon (Applications) and a gear icon (Admin). The grid icon is highlighted with a red box. Below the header, the main content area is divided into sections. The "Applications" section is highlighted with a black box. It contains a list of application types: "GENERAL" (Admin, Supervisor) and "OMNICHANNEL ROUTING" (ACD, Agent). The "Agent" option is highlighted with a red box. In the background, a table of users is visible with columns for NAME, ROLE, TYPE, and USERNAME. The table contains three rows of data.

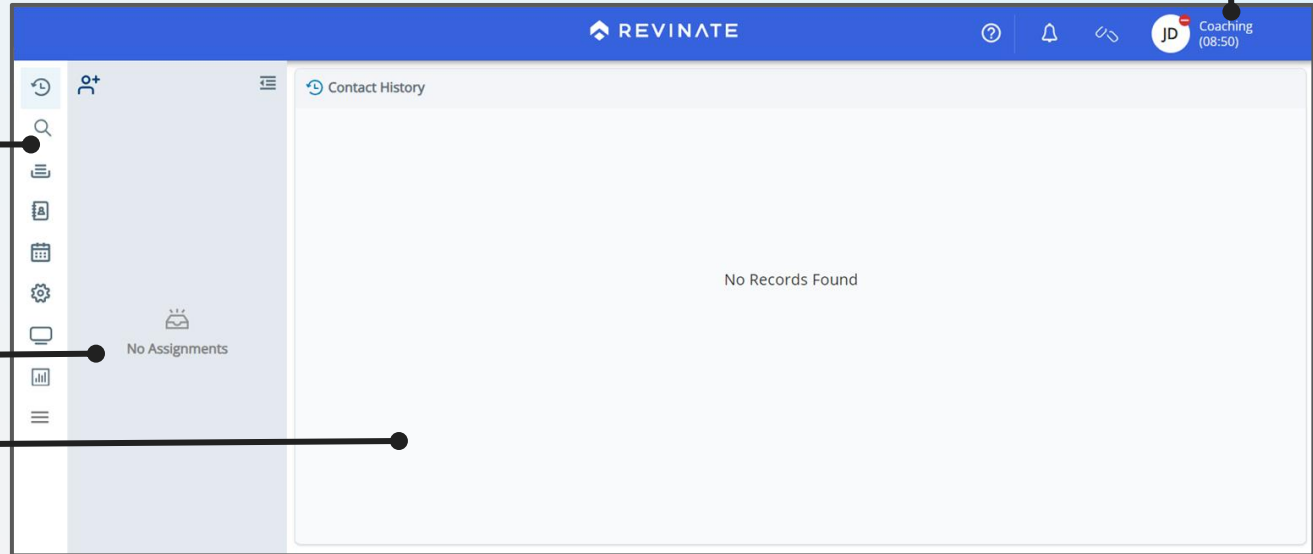
NAME	ROLE	TYPE	USERNAME
API User DO NO...			jack.
Brent	Administr...		0038@100...
Kelli	Administr...		0054@100...

Agent portal dashboard

- The left icon panel is where you will find important tools.

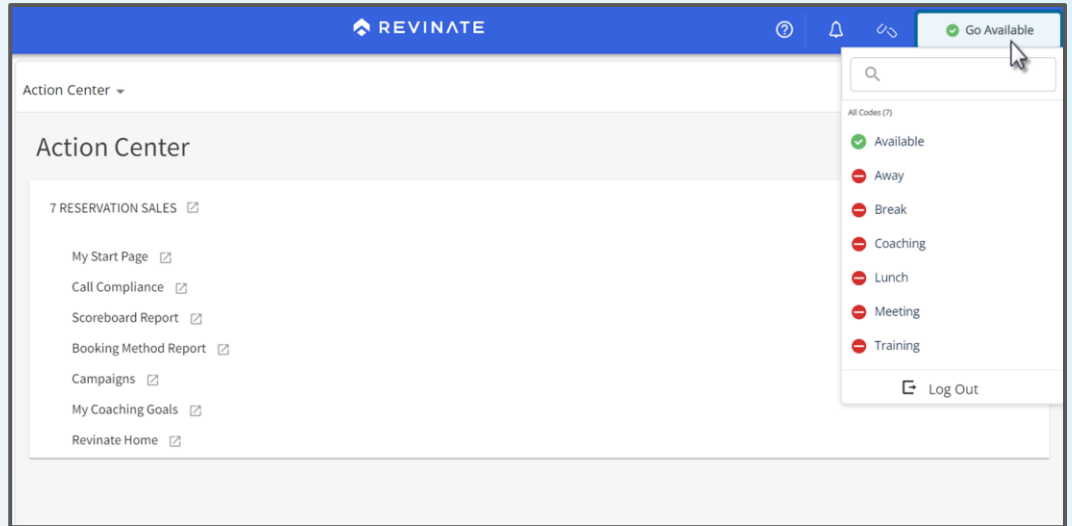
- Gray panel is where you will find the voice control center when a call is delivered.

- Interaction panel



Agent phone state

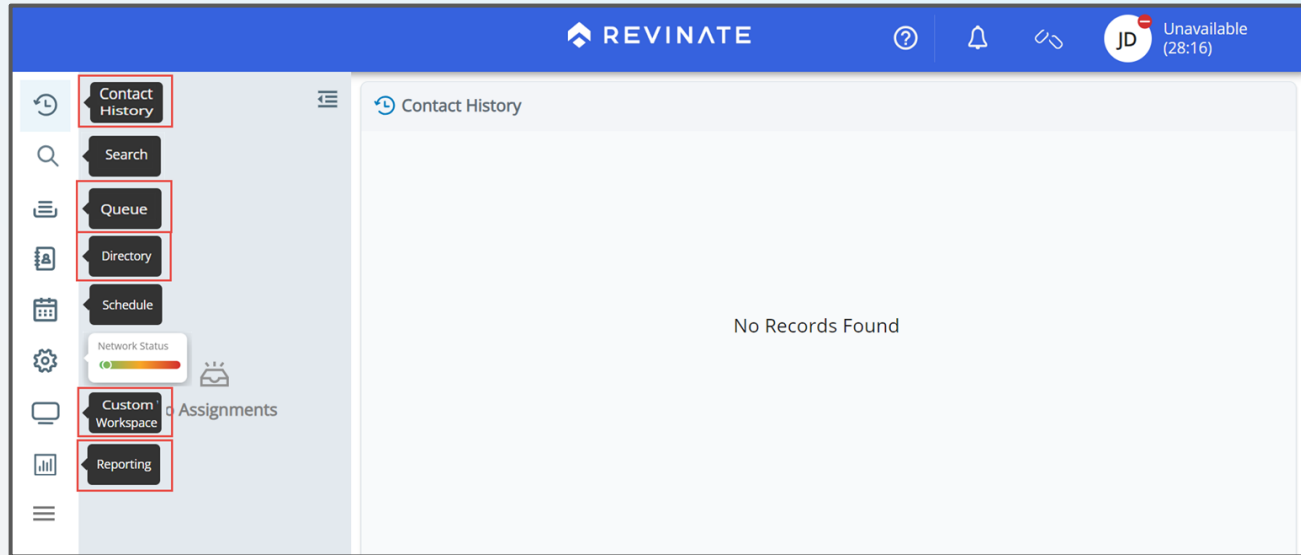
- Upon logging in, your phone state will be “unavailable.”
- Hover over unavailable to choose the next phone state.
 - Available means you are ready to receive calls.
- The timer will show how long you have been in the state.



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

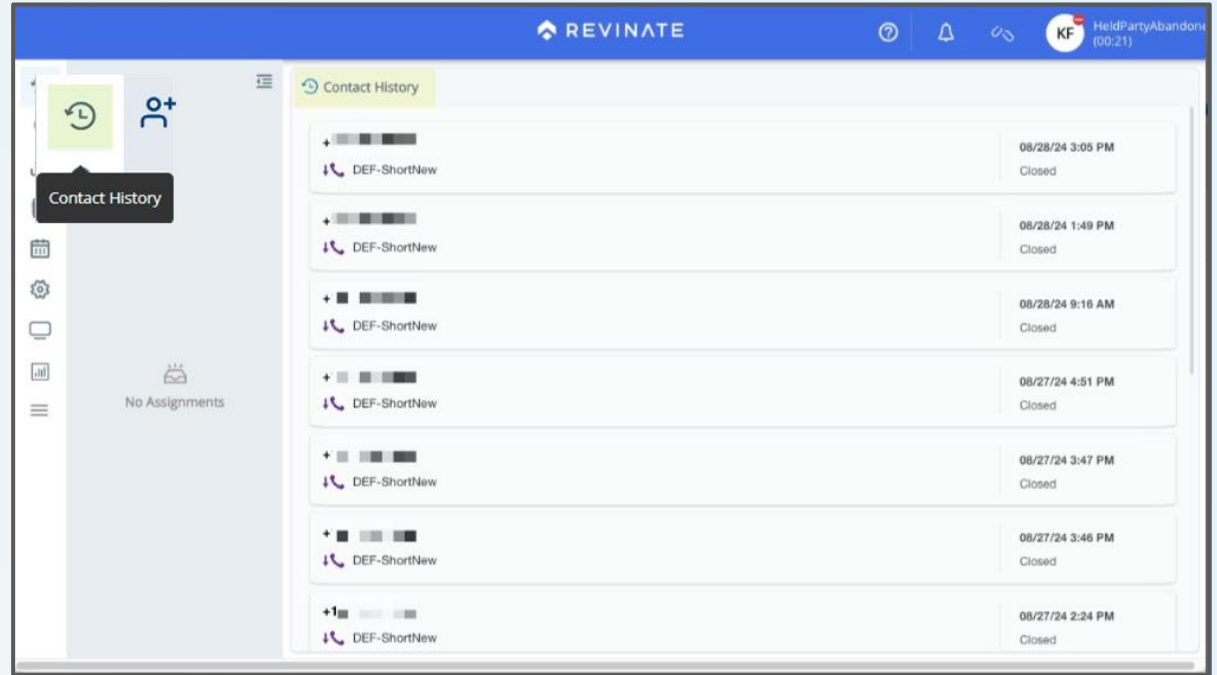
Icon panel

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



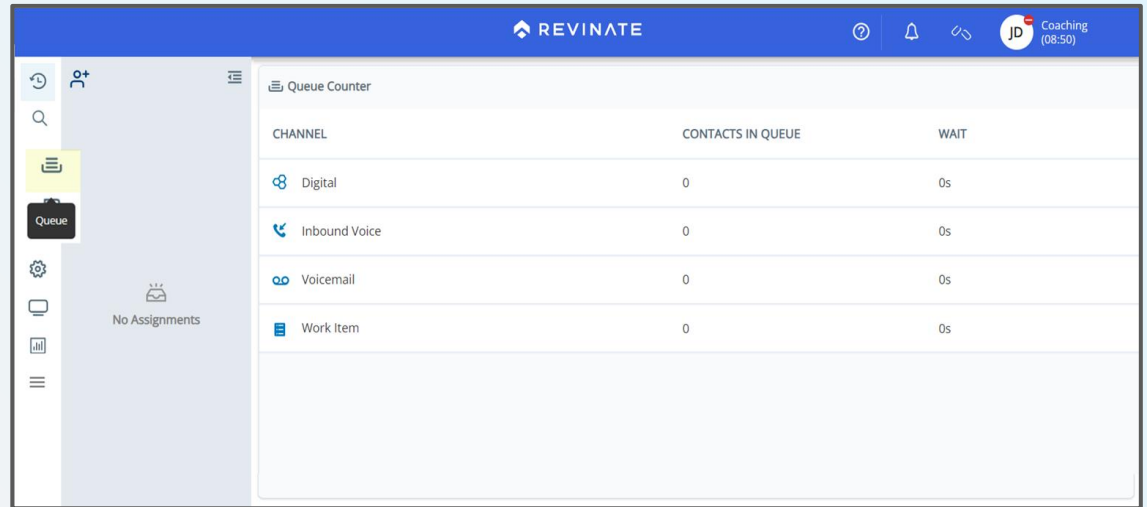
Contact History

- 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.



The screenshot shows the Revinate Queue Counter interface. The top navigation bar is blue with the Revinate logo and user information (JD Coaching, 08:50). The main content area is white and displays a table with the following data:

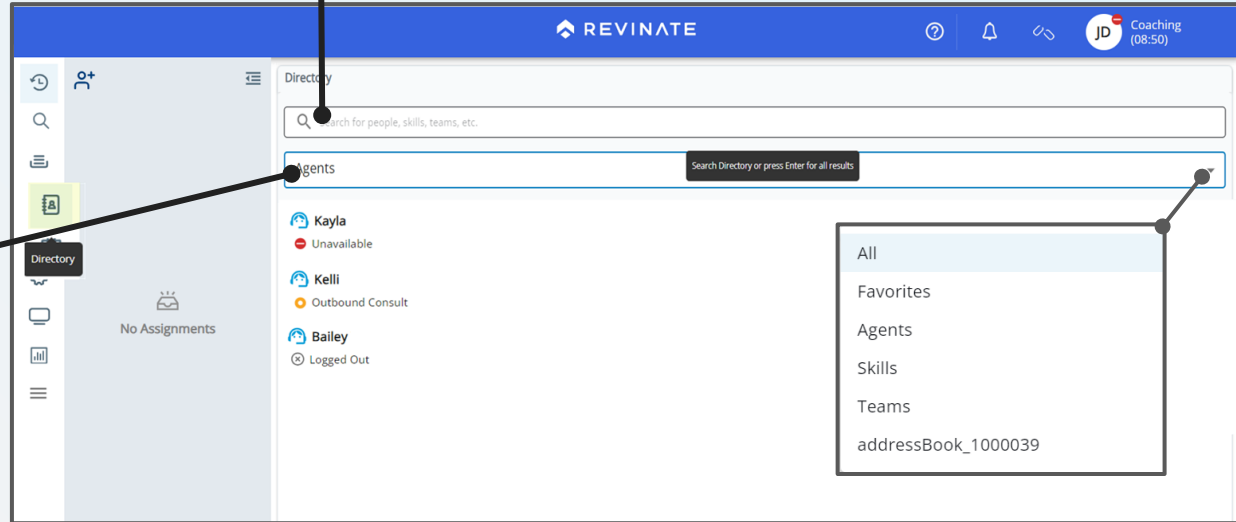
CHANNEL	CONTACTS IN QUEUE	WAIT
Digital	0	0s
Inbound Voice	0	0s
Voicemail	0	0s
Work Item	0	0s

The interface also includes a sidebar with navigation icons and a 'Queue' button. The main content area also displays 'No Assignments' with an envelope icon.

Directory

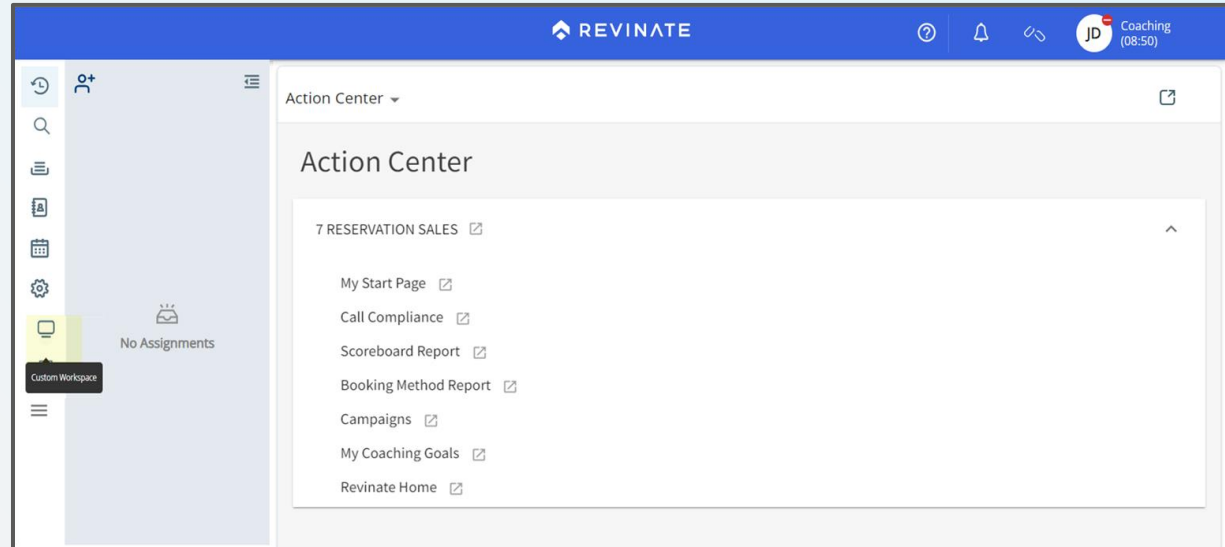
- Contains contact information for property departments and other agents on your team.
- First select the dropdown to find contacts

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!



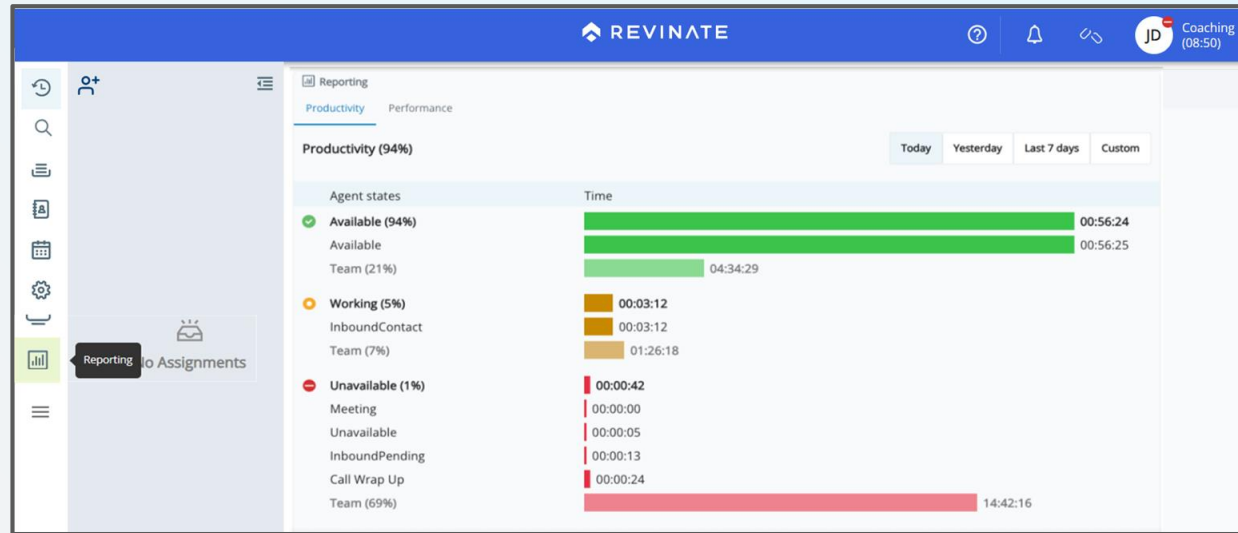
Custom Workspace

- 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.

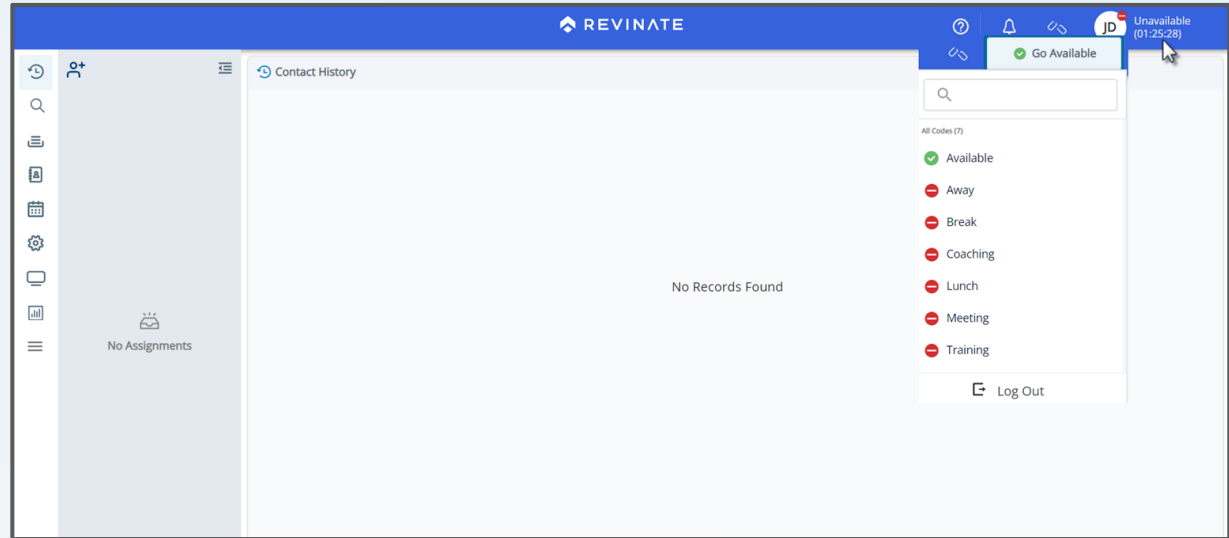




Inbound/Outbound Call

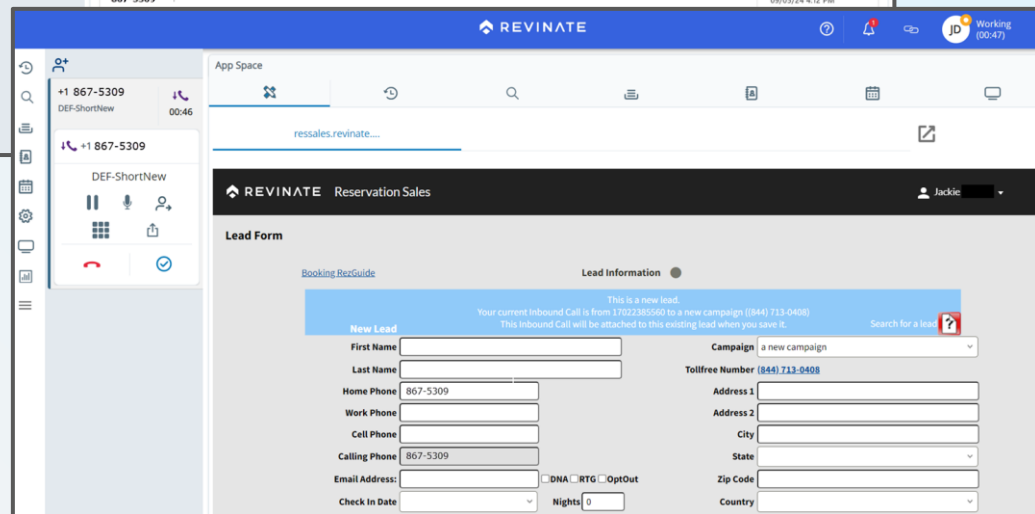
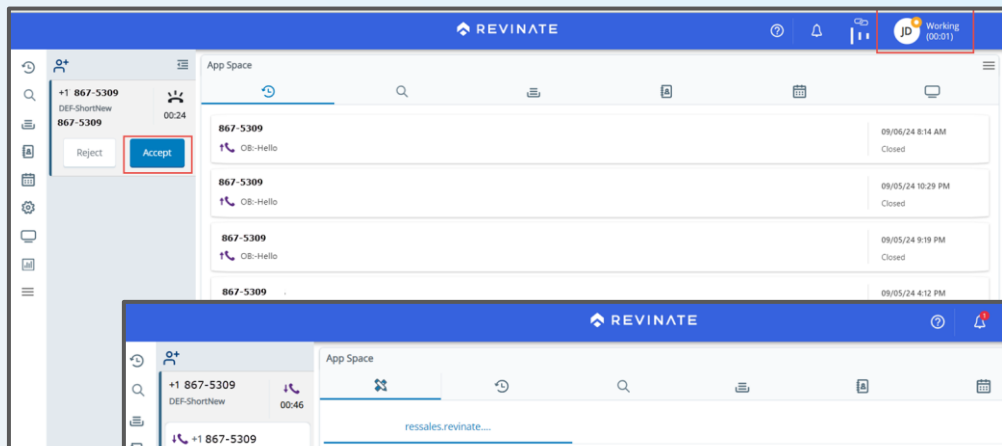
Changing agent phone state

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







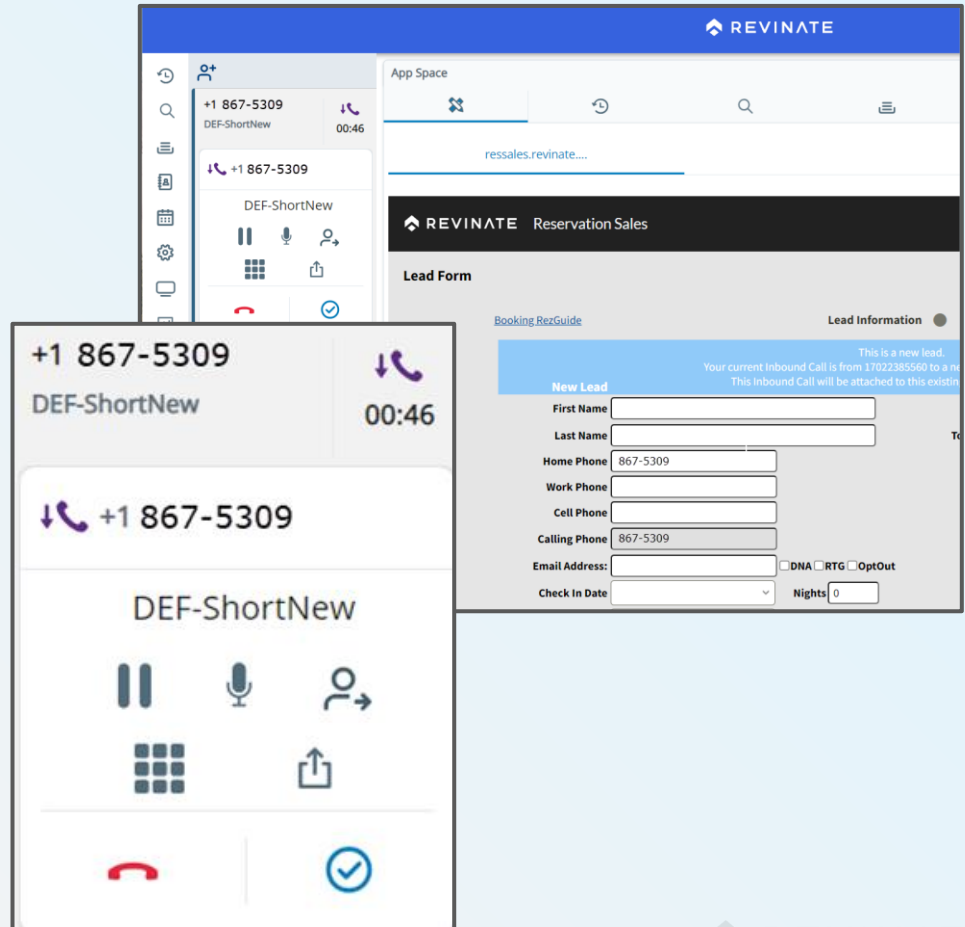
Incoming call

- 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

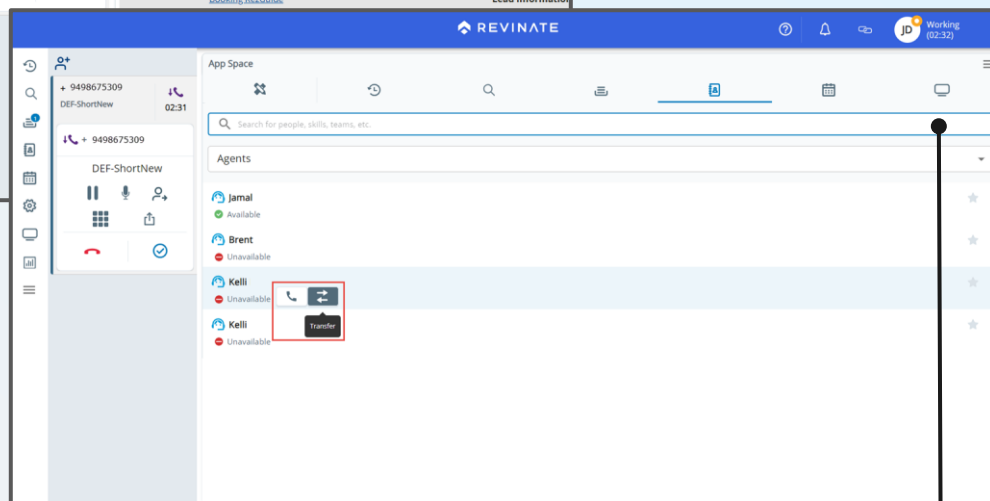
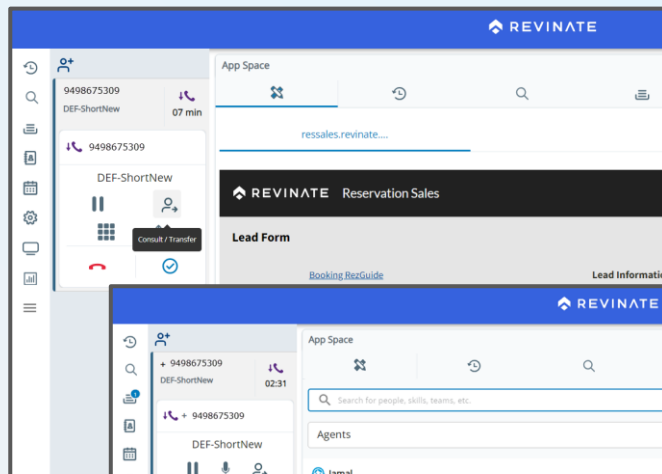


Consult/Transfer

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



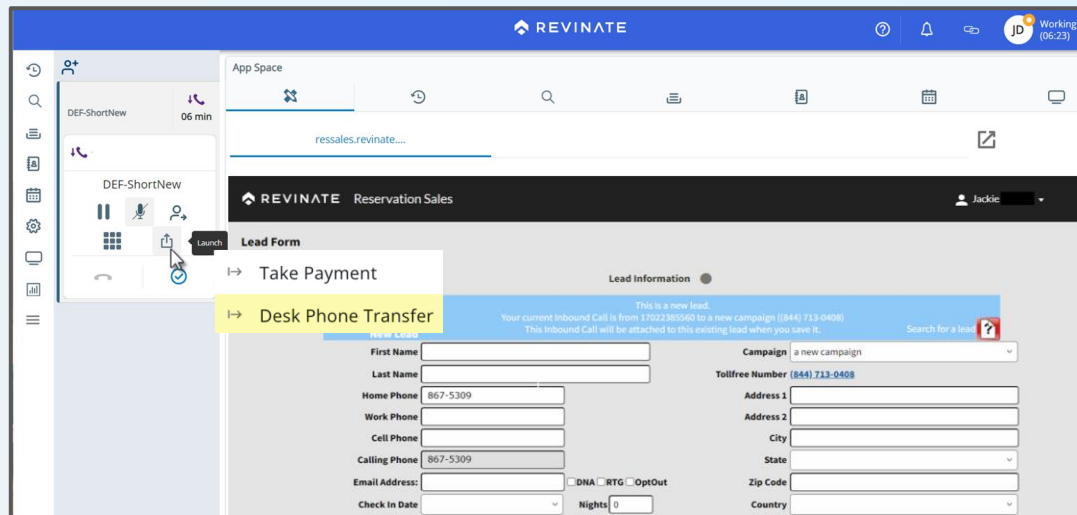
NOTE: You must hit the enter key in the search bar to populate the details of the directory selection.

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

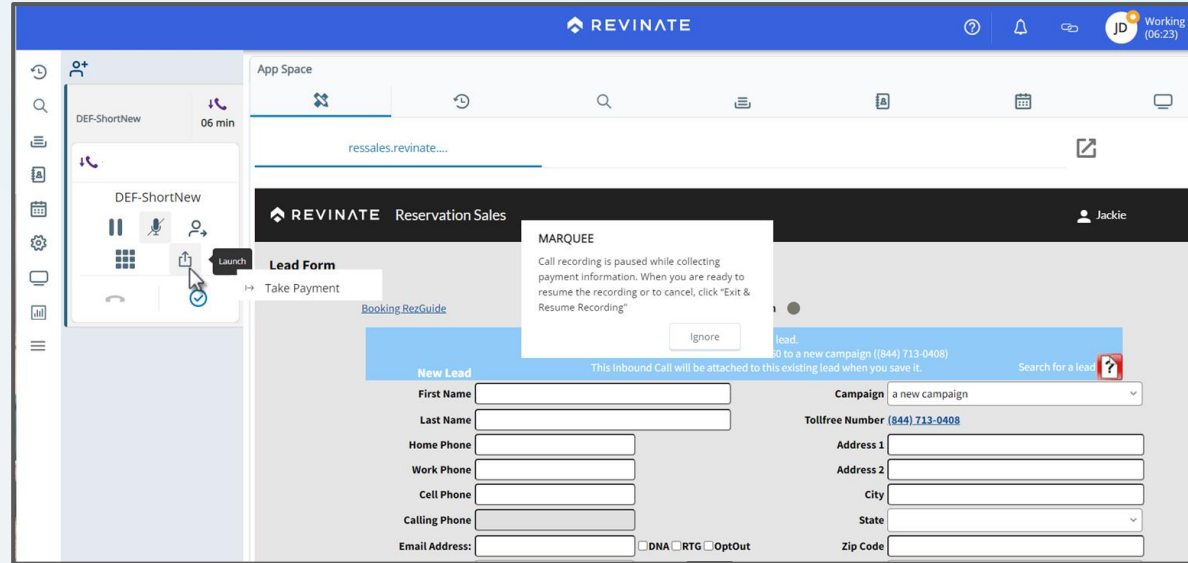


NOTE: You must select desk phone transfer for the call to transfer to the extension.

Taking payment

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

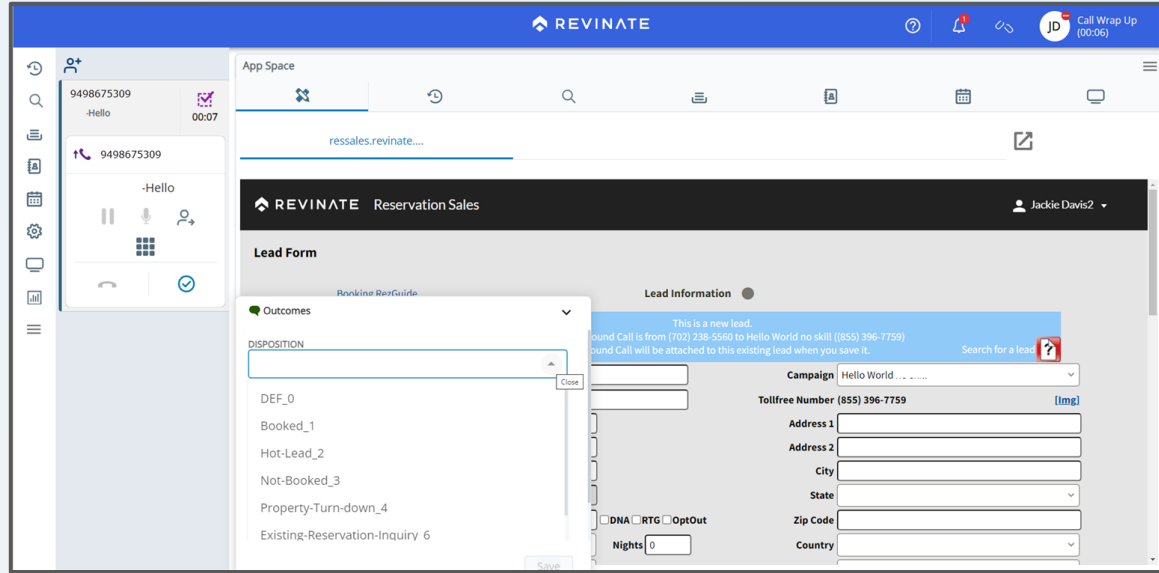
- Select the launch button
- Select take payment
- As seen the marquee message appears letting you know the recording is paused.
- Once payment is received you will select launch again and select exit & resume



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.

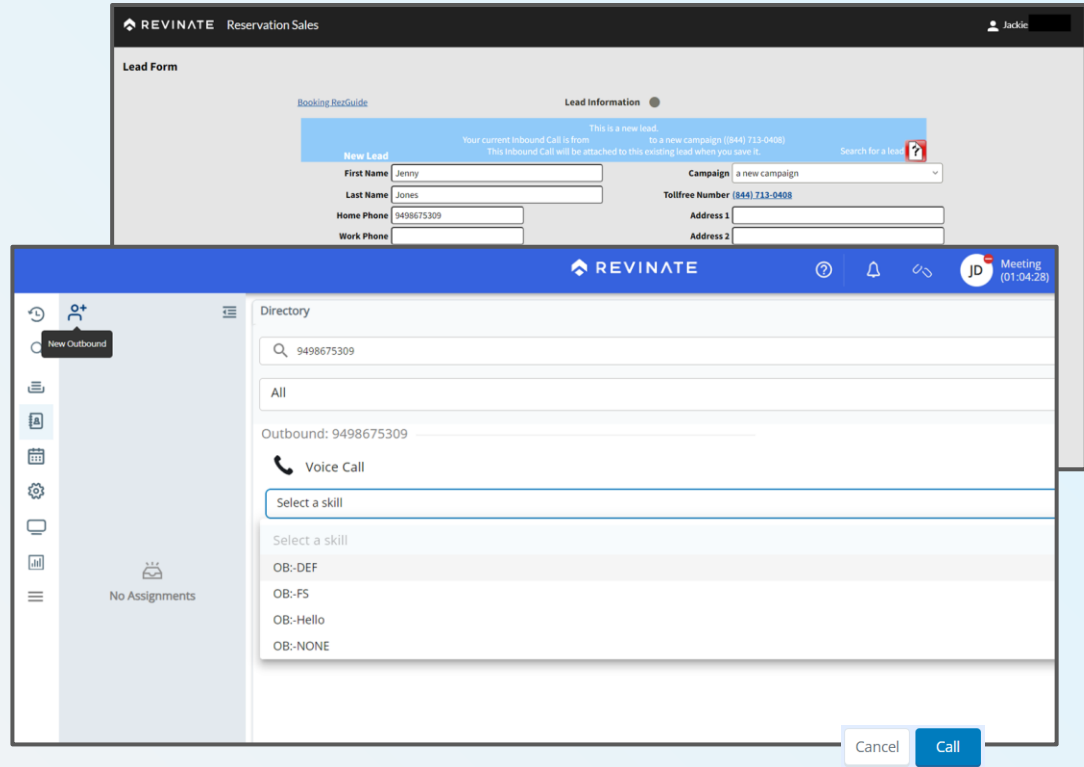


NOTE: Do not enter notes into the notes field of outcomes - this does not transfer to the lead form.

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





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

The screenshot displays the 'Inbound Call Tracking' report interface. At the top, there are navigation tabs: PRODUCTS, LEADS, TRACKING, REPORTS, CAMPAIGNS, MARKETING TOOLS, and ACCOUNT. The main title is 'Inbound Call Tracking (117 Calls: 1,046 Minutes)'. Below the title are several filter sections: Start Date (9/1/2024), End Date (9/9/2024), Category (All), Skill (All), Phone Number, Call Results (All), Market (All), Campaign (All), Agent (All), Connection Status (All), and ELM Compliance (All). There are also checkboxes for 'Unreviewed Calls Only', 'Res/Leads Only', 'Scored Calls Only', 'Booked w/o Pause Only', 'PM Transfer Only', and 'Multi Select'. Below the filters is a table with the following columns: Score, ELM, M/R, Call Date/Time, City, State, Campaign, Connection Status, Agent, Call Results, and Minutes. The table contains 7 rows of call data.

Score	ELM	M/R	Call Date/Time	City	State	Campaign	Connection Status	Agent	Call Results	Msg	Minutes
✓	+	□	9/5/2024 12:59:04 PM	BEND	OR	a new campaign	Dashboard Answered	Laura	Hot Lead	▶	2
✓	+	□	9/5/2024 12:56:51 PM	BEND	OR	a new campaign	Dashboard Answered	Bailey	Hot Lead	▶	4
✓	+	□	9/5/2024 12:54:40 PM	DENVER	CO	a new campaign	Dashboard Answered	Laura	Existing Reservation Inquiry	▶	1
✓	+	□	9/5/2024 12:52:59 PM	DENVER	CO	a new campaign	Dashboard Answered	Ryan	Not Booked	▶	3
✓	+	□	9/3/2024 11:50:34 AM	KEYS	FL	a new campaign	Dashboard Answered	Steve	Non Reservation Call	▶	23
✓	+	□	9/4/2024 11:29:07 AM	BEND	OR	a new campaign	Voice Mail	Derek	Other Inquiry	▶	7
✓	+	□	9/4/2024 11:19:01 AM	BEND	OR	a new campaign	Dashboard Answered	Derek	Misdialed	▶	2

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.

The screenshot displays the CXone Player interface. The main area is a blue banner with a white icon of a screen with a red 'X' and the text 'License Required'. Below this, it says 'A Screen Recording license is required to view and play back screen recording.' The interface includes a timeline at the bottom with a play button and volume controls. On the right, there is a 'Interaction Details' panel with the following information:

Interaction Details	
TYPE	DIRECTION
CONTACT ID 5065581	START TIME Sep 3, 2024 11:45:27 AM
DURATION 3 min	AGENT NAME Steve
DISPOSITION Hot-Lead_2	