RINGURA TRAINING

Agent guide

An agent's day: sign in, set your status, answer conversations on every channel, make and take calls, transfer, record the outcome and follow your figures.

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Steps

1 Sign in

Use the e-mail address and the temporary password your administrator gave you, or the link in your invitation e-mail. Then open **Security** and, under **Your password**, enter the temporary one and a new one and choose **Change the password**. Every sign-in may ask for the 6-digit code from your authenticator app: see Set up two-step verification. Use Chrome or Edge, not a private window, and a headset.

2 Open your Workspace

Choose **Workspace** in the menu. On the left are your status, **Offers**, **My conversations** and, when there is waiting work you may take, **Team inbox**. The open conversation is on the right. Choose **Enable desktop notifications for offers** so a new offer reaches you even when the tab is in the background.

3 Set your status

Under **Your status**, choose **Ready**, **Not ready** or **Offline** and choose **Set status**. With **Not ready**, pick the **Reason**: **Break**, **Lunch**, **Training**, **Admin work** or **Meeting**. Your status shows in the top bar. You receive offers only while you are **Ready**.

4 Accept or decline an offer

A new conversation arrives under **Offers** with the customer, the channel, the queue and a countdown. Choose **Accept** to open it, or **Decline** to pass it on. If offers go unanswered, you are set to **Not responding** and offers stop: set yourself **Ready** again to receive them. Under **Team inbox**, **Assign to me** takes waiting work yourself.

5 Reply on any channel

Open a conversation from **My conversations**. The thread shows every message across channels. Write in the box and choose **Send** (Ctrl + Enter sends). **Attach a file** adds a file, **Canned replies** inserts a prepared text, and **Suggest a reply** drafts one from your knowledge base where it is switched on. Switch to **Internal note** to write to colleagues: it is never sent to the customer.

6 Follow the channel's rules

The box offers only what the channel allows. On WhatsApp, free text is possible for 24 hours after the customer's last message. After that the box says: The 24-hour WhatsApp window is closed: only an approved template can be sent. Choose a **Template**, fill in its values and choose **Send template**. An SMS shows how many segments it uses.

7 Transfer, resolve and record the outcome

Under **Actions**, pick a queue in **Transfer to** and choose **Transfer** to pass a conversation on. To finish, choose the **Outcome when you resolve** (**Answered**, **Needs follow-up**, **No reply**, **Spam** or **Other**), then **Resolve** at the top of the conversation. **Full timeline** opens the whole history, calls included.

8 Find conversations

Conversations lists every conversation you may see, with the views **All**, **Open**, **Mine**, **Unassigned** and **Done** and a channel filter. It is read-only: choose **Open in the workspace** to reply. Press ? on either page for the **Keyboard shortcuts**: J and K move through the list, R writes a reply, N a note, E resolves and / searches.

9 Open the browser phone

Choose the phone button in the top bar; the phone floats on every page. Allow the microphone when asked and wait for **Registered**. If it says **The phone is not connected**, choose **Try again**. See Make and take calls in the browser.

10 Make and take calls

Type the full number with its country code in **Number to dial**, or use the keypad, and choose **Call**. An incoming call shows the caller: choose **Answer** or **Decline**. During a call use **Mute**, **Hold**, **Keypad** and **Speaker**. Choose **Hang up** to end it.

11 Transfer a call or add someone

During a call choose **Transfer**, enter a number or extension, then **Transfer now** to pass the call straight on, or **Consult first** to speak to the other person while the customer waits on hold. After consulting choose **Complete transfer** or **Cancel consult**. **Add to call** makes a three-way call.

12 Work dialler calls

If you are on a campaign, the **Dialler** card sits in your **Workspace**. For a preview campaign, choose the **Campaign** and **Next lead**, read the lead and its **Script**, then **Dial** or **Skip**. Progressive campaigns call for you while you are **Ready**; tick **Answer the dialler's calls automatically** in the phone if you want. After the call pick the **Outcome**, add a **Note**, and choose **Save outcome**. See Run dialler campaigns.

13 Book a callback

For the outcome **Call back**, fill in the **Date**, **Time** and **Time zone** of the customer, and tick **I will take this callback myself** to keep it. The lead comes back to you at that time.

14 Take a card payment on a call

Where it is switched on, choose **Card payment** during a connected call. Enter the **Amount**, **Currency** and a **Reference** (what the payment is for, never a card number) and choose **Ask the customer to type the card**. The customer types the card on their keypad; you hear one flat tone per key and see only how many keys were pressed, then the result. See Take card payments on calls.

15 Use the console on your phone

On a phone-sized screen the console shows tabs at the bottom: **Phone**, **Inbox**, **Contacts** and **Me**. On **Phone**, choose **Install** (on iPhone, follow **How to add**) and then **Allow call alerts**, so an incoming call wakes the app when it is closed. See Mobile apps.

16 Follow your own figures

My performance shows your figures for **Today**, **This week** or **This month**, and your progress to the **Goals** your desk set. Tick **Show me on the leaderboard** to take part; you can leave at any time. **My quality** shows your scored conversations and coaching notes: choose **Acknowledge**, or **Dispute** a score you disagree with.

Good to know

- If you see **Not available** on a page, that feature is not switched on for you. Your administrator decides this on **Feature access**.

- You receive no offers while you are **Not ready** or **Offline**. A supervisor can take you offline with **Log out** if you leave your desk online.
- If a reply is refused with This conversation is assigned to someone else., a supervisor or colleague has taken it over. With You are at capacity on this channel., resolve or transfer a conversation first.
- If you hear nothing, or the customer cannot hear you: check the microphone is allowed in the address bar, use a headset and try without a VPN. Audio needs outbound UDP ports 10000 to 20000 to be open on your network.
- Until your company is verified and the phone system is live, the phone cannot place calls. A new account without a plan can call only its sign-up country.
- Your card payment details never reach you, the recording or the transcript. Never write card numbers in a reply, a note or a reference.
- For a one-page summary to keep at your desk, print the Agent quick reference.

Related guides

- **Agent quick reference**: https://ringura.com/help/agent-quick-reference/
- **Make and take calls in the browser**: https://ringura.com/help/browser-phone/
- **Run outbound campaigns with the dialler**: https://ringura.com/help/dialler-campaigns/
- **Take card payments on calls without hearing the card**: https://ringura.com/help/secure-card-payments/
- **Take calls on your mobile**: https://ringura.com/help/mobile-apps/
- **Score conversations and coach agents with QA scorecards**: https://ringura.com/help/qa-scorecards/
- **Connect WhatsApp with your own Meta account**: https://ringura.com/help/whatsapp/
- **Set up two-step verification**: https://ringura.com/help/two-step-verification/