

QUICK REFERENCE GUIDE

Call Center Agent Status

Overview

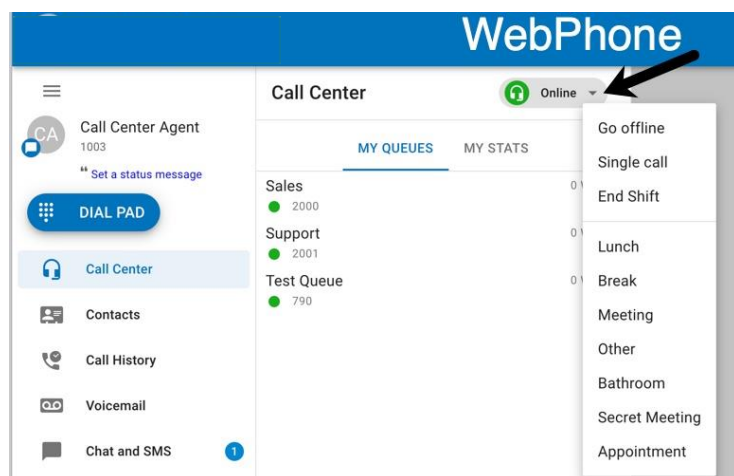
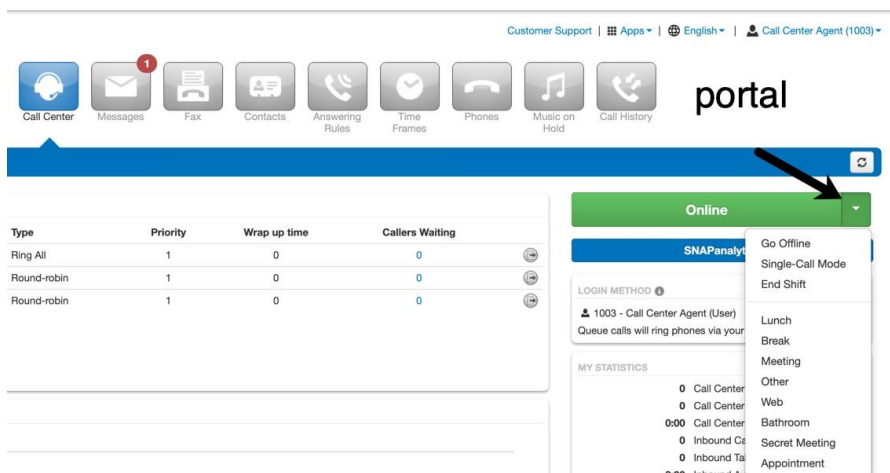
Agent Status is a tool that shows whether a Call Center Agent is offline or online.

An agent simply clicks on the dropdown arrow and selects a status change. If the change isn't reflecting right away, refresh the page.

**Prior to v44, the Agent Status button in WebPhone is on the right side of the page next to the sip phone button instead.*

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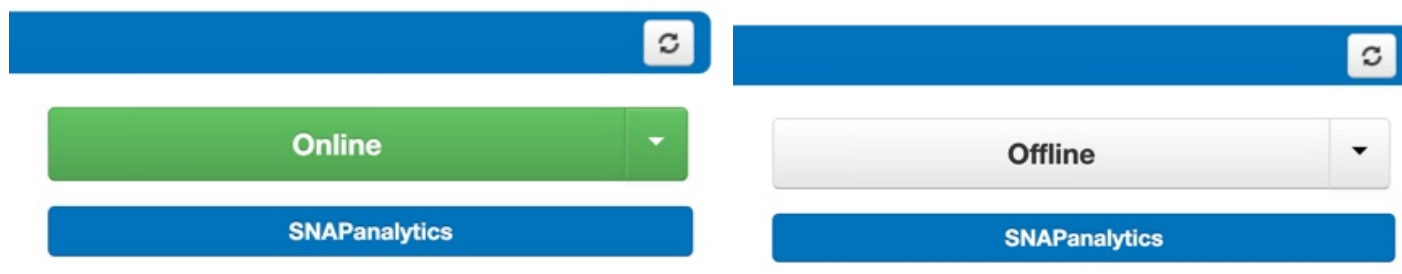
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Agent Status Types

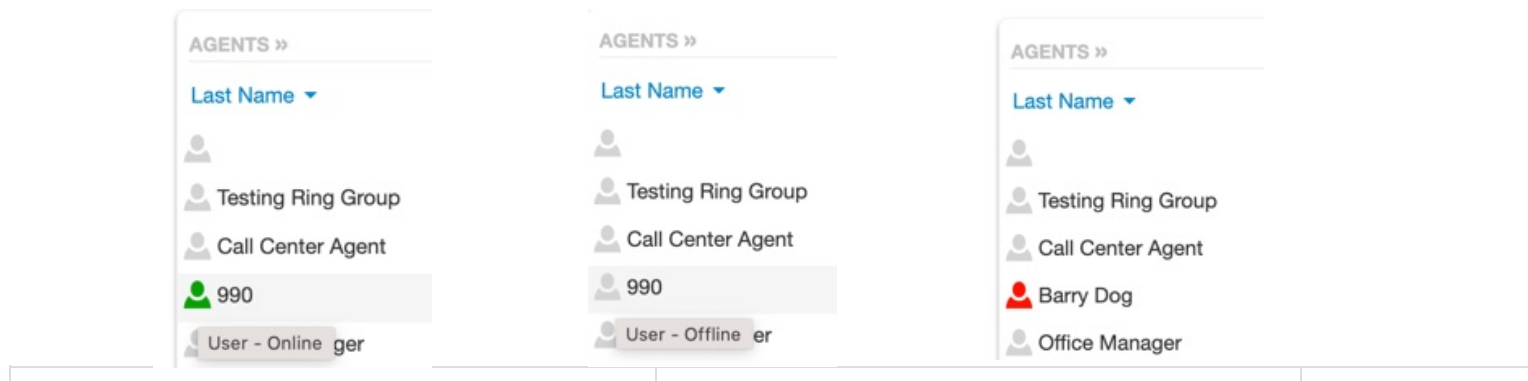
Agent Status colors are consistent between WebPhone and the Portal starting in SNAPsolution v44.1+ (OMP-5006). Prior to v44.1, the Portal shows grey for only an offline status, and not for "on break", "lunch", or custom selections.

Online (green)	An online status is straightforward; there is one option to select "online" and another to select online temporarily ("single call" or "single-call mode").
Offline (grey)	An offline status has the following (pre-defined) options: "end shift", "lunch", "break", "meeting", and "other". Managers can also create a custom Agent Status (such as "appointment"). Custom statuses are only for an offline status. Note that although "end shift" does not log the user out of the portal, it has the same effect on the agent's availability and stats as logging out.
On a Call (red)	An "on a call" status represents an agent who is online, but busy on a call.

The Agent Status button shows **green for online** and **grey for offline** (only 2 colors).



Managers can see 3 colors in the "Agents" Table: **green for online**, grey for offline, and **red for on a call**.



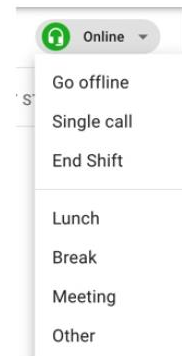
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Changing Agent Status

An Agent Status can be a pre-defined choice or a custom choice.

Pre-Defined Agent Statuses

Some of the Agent Status choices are pre-defined and cannot be changed at this time. These are "go online", "single call", "end shift" (used for accurate [LI \(logged in\) reporting](#)), "lunch", "break", "meeting", and "other".



Custom Agent Statuses

Starting in SNAPsolution v43, Call Center Supervisors can add custom agent statuses, such as "appointment", which provides more insight into what the agent's status is than simply using "other" or "break". Custom statuses increase granularity in the Call Center and on the resulting [call center reports](#).

Note that custom statuses are defined as a period of time when the agent is "offline". Example custom statuses are "appointment" or "bathroom"; these are periods of time when the agent is not available to take calls. The custom statuses are shared by all agents in the domain/organization and are limited to 8.

Custom Agent Status Procedure

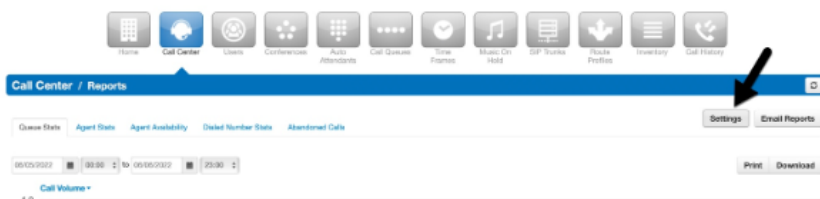
1. In the portal, with the scope of a Call Center Supervisor or above, a manager can access the UI to make a custom agent status by navigating to **Settings**.

Settings can be accessed in two ways:

It is available on the **Call Center** home screen.



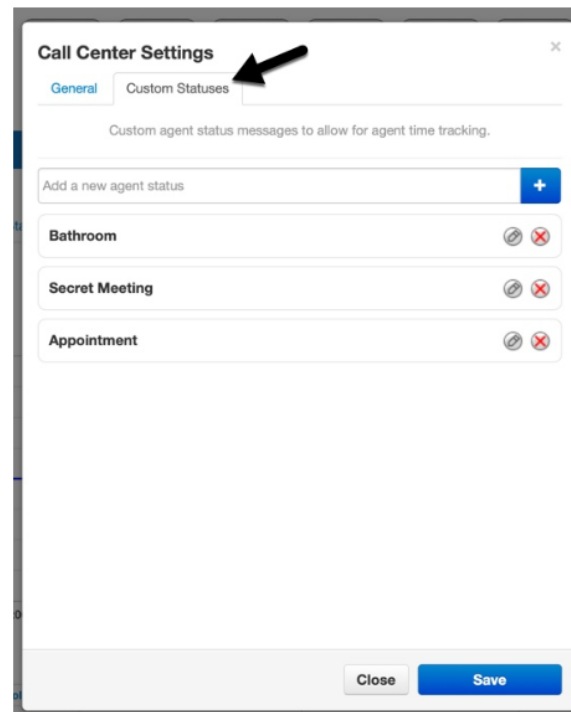
Or by navigating to **Reports** from the Call Center screen (this was introduced in V43).



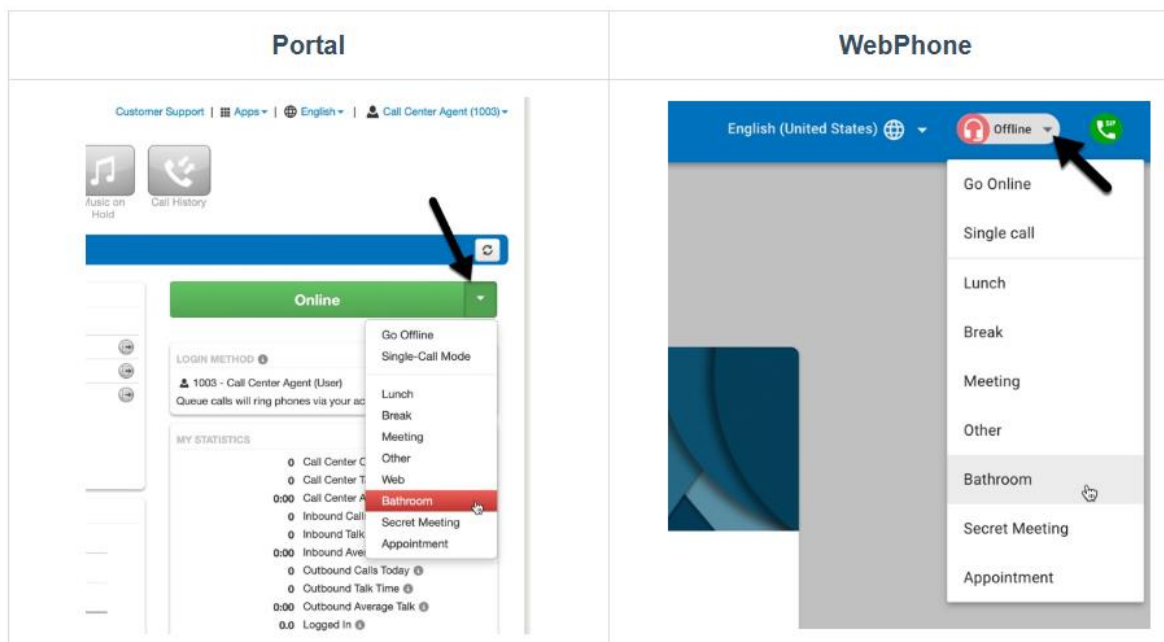
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2. In the Call Center Settings modal, navigate to the "Custom Statuses" tab.

- Click on the **blue +** symbol to add a new custom agent status. There are a maximum of 8 custom statuses that can be added. Each status can be no longer than 20 characters. Remember that all custom statuses indicate that the user is "offline" on reports.
- Click on the **pencil** icon to edit an existing custom status.
- Click **Save** to finish making changes.



3. Custom statuses are available to agents in two places: in the call center agent home page as part of the portal and in SNAPmobile web under the call center tab (in v44+, the button in WebPhone is on the left side of the page instead).



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Call Center Agent Status

The Call Center Agent is always "offline" when they select a custom status.

The screenshot shows the FirstLight Call Center Agent interface. At the top, there are navigation icons for Call Center, Messages, Contacts, Answering Rules, Time Frames, Phones, Music on Hold, and Call History. Below these is a blue header bar with a dropdown menu currently set to "Offline: Appointment". A black arrow points to this dropdown menu. To the left of the dropdown is a table with columns for Priority, Wrap up time, and Callers Waiting. Below the dropdown is a "LOGIN METHOD" section showing the user "1009 - Call Center Agent (User)" and a note: "Queue calls will ring phones via your active answering rule."

Priority	Wrap up time	Callers Waiting
1	0	0
20th	1	0
30th	1	0

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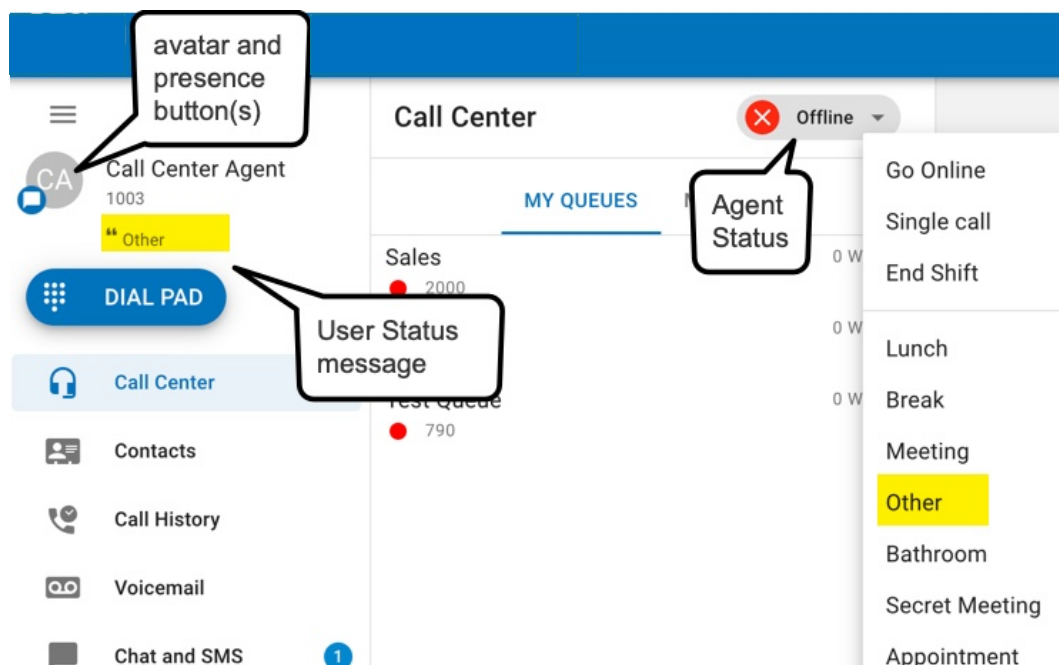
Agent Status v. User Status Message Behavior

In WebPhone, changing Agent Status affects the User Status message, but not vice versa.

Example #1: Agent Status changes & User Status message reflects the change

For instance, in this first example, the Agent changes their status to "Other". The User Status message automatically changes to reflect the Agent Status change (the message now says "Other"). If you don't see this change, please refresh the page.

- The pre-defined Agent Statuses of "Lunch", "break", "meeting", & "other" and custom statuses all behave similarly.
- "Go Online", "single call, and "end shift" won't display those words as the User Status message. It will instead display "set a status message".
- Note that the User Status message can be changed at any time by clicking directly on it, and typing into the resulting text box. Remember that changing Agent Status will also change the User Status message though.
 - For instance, an agent is online and they change their Status Message to "happy to help". They head to a meeting and change their Agent Status to reflect that. Their Status Message now says "meeting". They return and change their Agent Status back to "Go Online". Their Status Message is back to the default message - "set a status message".
 - If a user changes their status message and moves their agent status to "go online", "single call", or "end shift", depending on the version, different behavior is to be expected.
 - Before v44.1, the user status message will return to "set a status message."
 - In v44.1+, the user status message, "happy to help", will persist.



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Example #2: User Status message changes and Agent Status does not reflect the change

In this second example, the Agent changes their User Status message to "working on a project". Their Agent Status remains unchanged. What if they change their User Status message to "lunch", or a status that uses the same language as an Agent Status? The same will happen. Agent Status is not affected by what is written in the User Status message.

The screenshot shows a call center agent's dashboard. On the left, a sidebar contains navigation options: 'DIAL PAD', 'Call Center', 'Contacts', and 'Call History'. The 'Call Center' option is selected. The main area displays the agent's profile as 'Super User' (ID 1099) with a yellow status message 'working on a project'. Below this is a 'MY STATUS' section with a call center icon and a dropdown menu set to 'Online'. A callout box points to the 'MY STATUS' label with the text 'unchanged'. Below the status section, a list of queues is shown:

Queue Name	Count	Waiting	Agents
Sales	2000	0 WAITING	1
Support	2001	0 WAITING	0
Test Queue	790	0 WAITING	0
Testing Cal Queue	7800	0 WAITING	0

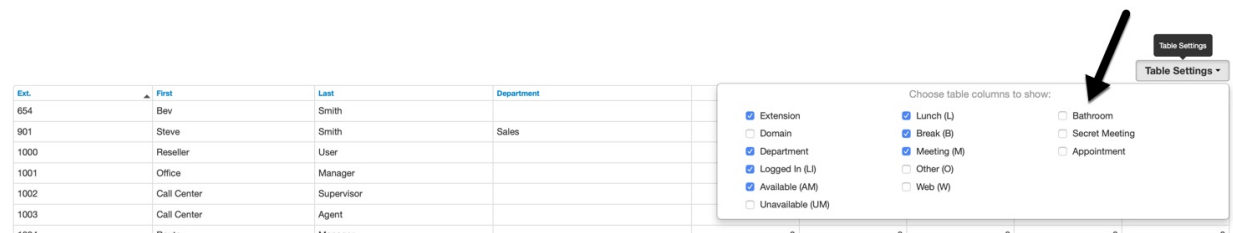
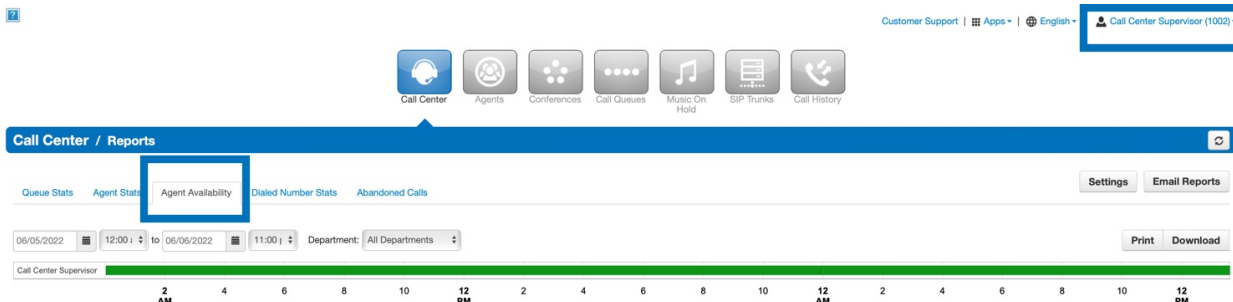
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Reporting on Agent Status

Call Center Supervisors can review and report on the time spent in each Agent Status (including a custom state).

1. Navigate to the **Agent Availability** tab in Call Center "Reports". Click **Table Settings** and then check or uncheck which Agent Statuses should be reflected in the report.



2. The resulting **Agent Availability** reporting table displays the stats in a similar format to the other time-based availability statistics.

In the example below, the Call Center Supervisor sees that the user named "Call Center Agent" was at an appointment for 1.5 minutes today (90 seconds) and in the bathroom for 0.2 minutes (20 seconds). Total time is reported in minutes.

Ext.	First	Last	Department	LI	AM	L	B	M	Bathroom	Secret Meeting	Appointment
654	Bev	Smith		0	0	0	0	0	0	0	0
901	Steve	Smith	Sales	0	0	0	0	0	0	0	0
1000	Reseller	User		0	0	0	0	0	0	0	0
1001	Office	Manager		0	0	0	0	0	0	0	0
1002	Call Center	Supervisor		24	1441	0	0	0	0	0	0
1003	Call Center	Agent		0	0	0	0	0	0.2	0	1.5
1004	Route	Manager		0	0	0	0	0	0	0	0
1099	Super	User		0	0	0	0	0	0	0	0

The row for 'Call Center Agent' (Ext. 1003) is highlighted with a red box. A tooltip for the 'Appointment' column shows: 'Appointment', 'Total time an agent status is set Appointment'.