

MAX Agent

Interactive Quick Guide

Important Terms

Contact Center = Central point where all customer interactions are managed across various channels, where contacts are not typically assigned to a specific agent, but rather a skill, which is handled by a team of agents.

Agent Leg = Connects the Contact Center to the correct RingCentral device, so that Contact Center calls can be heard and interacted with.

RingCentral device = Used to connect calls to the Contact Center. This could be the RingCentral app, Contact Center Voice plugin, or a physical phone.

Station ID = A number used to connect a specific agent to any given RingCentral device. Using Station IDs help reduce the risk of errors made by memorizing or entering phone numbers to log in and ensures calls are delivered to the correct device at the right time.



Skill = Each skill or queue delivers contacts through only one channel: inbound phone, outbound phone, chat, inbound email, outbound email, or voicemail. They are used to route each contact to the next available agent who can best meet their needs.

Masking = If the contact is being recorded, stops the recording or generates white noise, helping keep sensitive information secure by preventing it from being recorded. While masking, you cannot hang up or place the contact on hold.

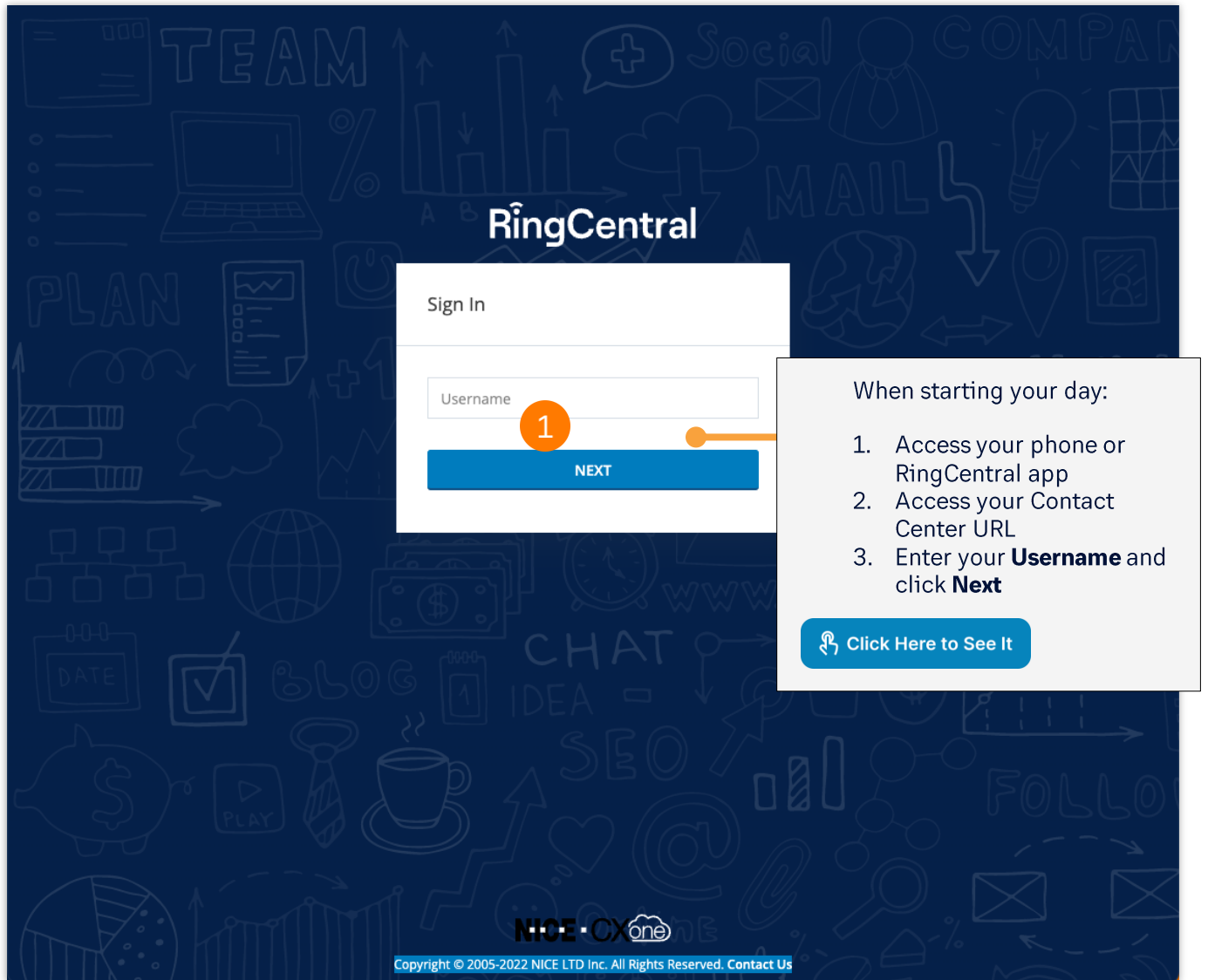
Commitment = A method to place a follow-up call in a skill or your schedule. Your commitments appear on your schedule and remind you of the commitment at the specified time.

Instructions

Use this Interactive Quick Guide to explore the basics of the MAX Agent.

1. Use  [Click Here to See It](#) and other links to explore various functions and screens.
2. Use  [Go Back and Explore More](#) to return to the previous selection.

Logging In – Username



The image shows the RingCentral Sign In interface. The background is dark blue with various white line-art icons related to business and technology. In the center, there is a white box titled "Sign In". Inside this box, there is a text input field labeled "Username". An orange circle with the number "1" is positioned over the "Username" field, with a line pointing to it. Below the input field is a blue button labeled "NEXT".

When starting your day:

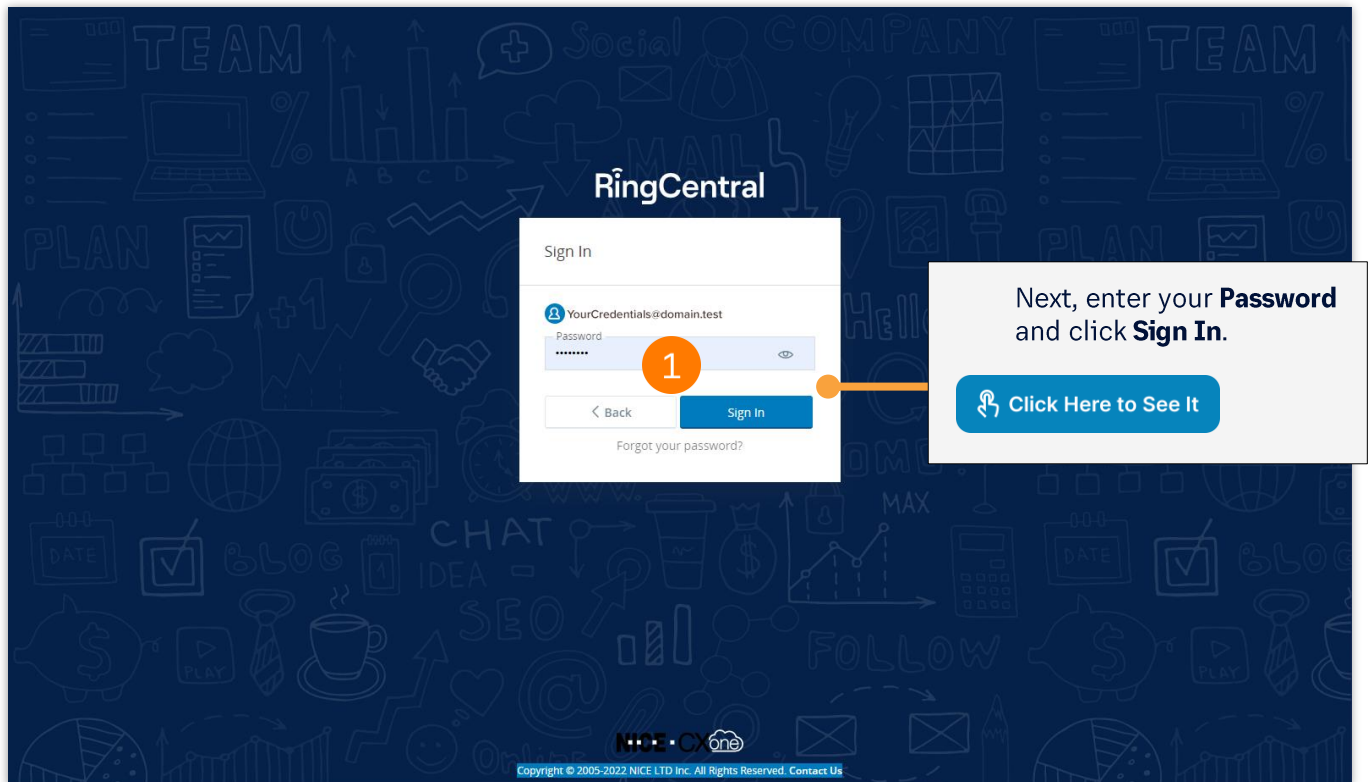
1. Access your phone or RingCentral app
2. Access your Contact Center URL
3. Enter your **Username** and click **Next**

[Click Here to See It](#)

NICE CXone

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Logging In – Password



Logging In – App Selector

The screenshot displays the RingCentral MAX Agent interface. The top navigation bar includes the 'My Zone' profile, 'CONTACT CENTER', and the 'RingCentral' logo. On the left, a sidebar menu lists various functions: 'My Schedule' (highlighted with an orange circle and the number 1), 'Schedule Requests', 'Evaluations', 'Shift Bidding', 'Recent Interactions', and 'Coaching'. The main content area is titled 'My Schedule' and shows a calendar view for 'Apr 25, 2022'. The schedule is currently empty, with time slots from 8AM to 4PM visible. To the right of the calendar is an 'Agenda' section showing 'No schedules' and two expandable categories: 'ON CALL (0)' and 'OUT OF OFFICE (0)'. A callout box on the left side of the interface provides instructions: 'You can review your schedule here, if enabled. Click the **App Selector** in the upper-left to access the MAX Agent.' Below this text is a blue button labeled 'Click Here to See It' with a cursor icon.

1

My Zone

CONTACT CENTER RingCentral

My Schedule

Schedule Requests

Evaluations

Shift Bidding

Recent Interactions

Coaching

Apr 25, 2022

8AM

9AM

10AM

4PM

Agenda

No schedules

ON CALL (0)

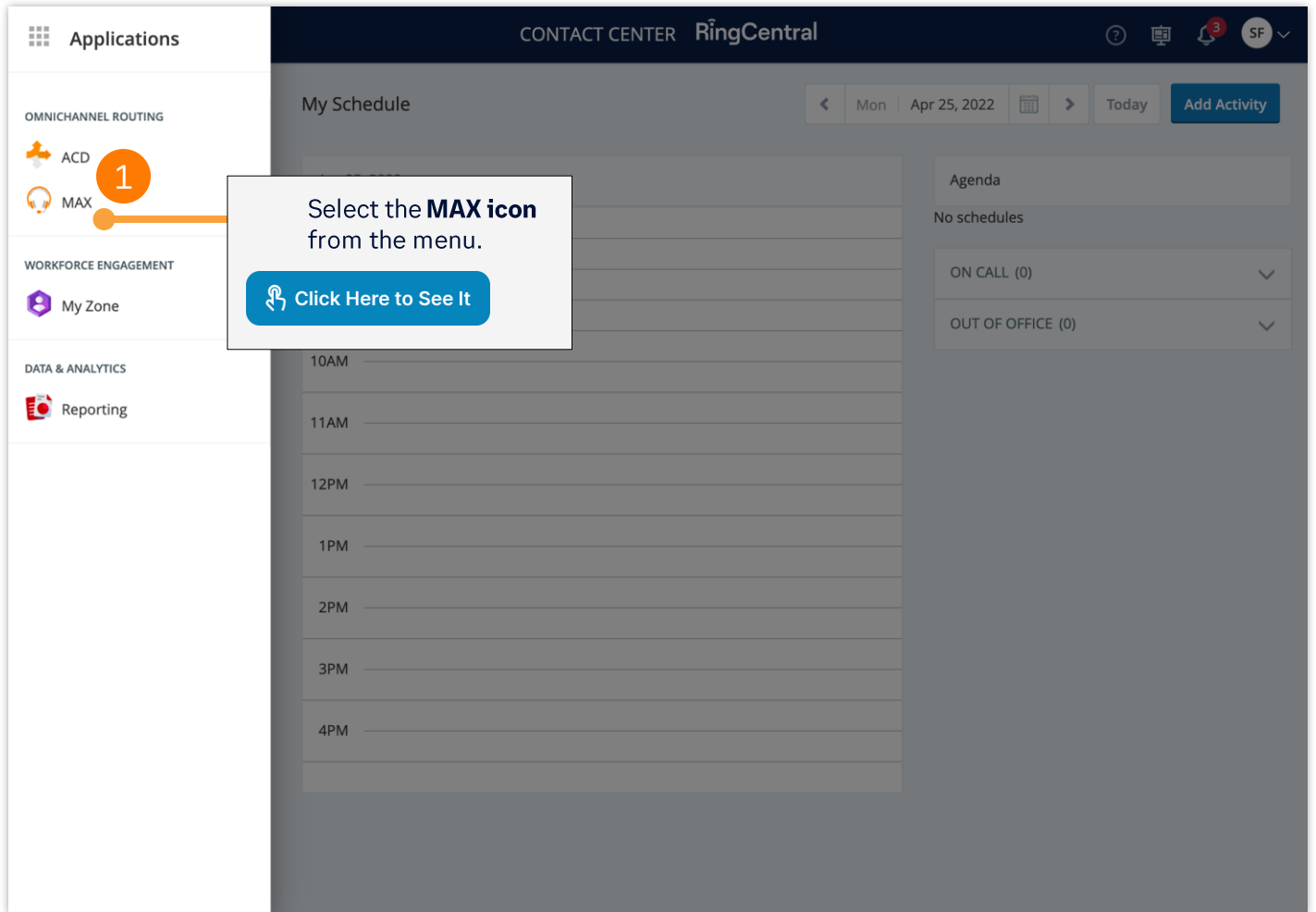
OUT OF OFFICE (0)

You can review your schedule here, if enabled.

Click the **App Selector** in the upper-left to access the MAX Agent.

Click Here to See It

Logging In – Launching MAX



Logging In – Station ID

Voice Connection

- ☐ Set Phone Number
- ☒ Set Station ID
- ☐ Integrated Softphone

Station ID

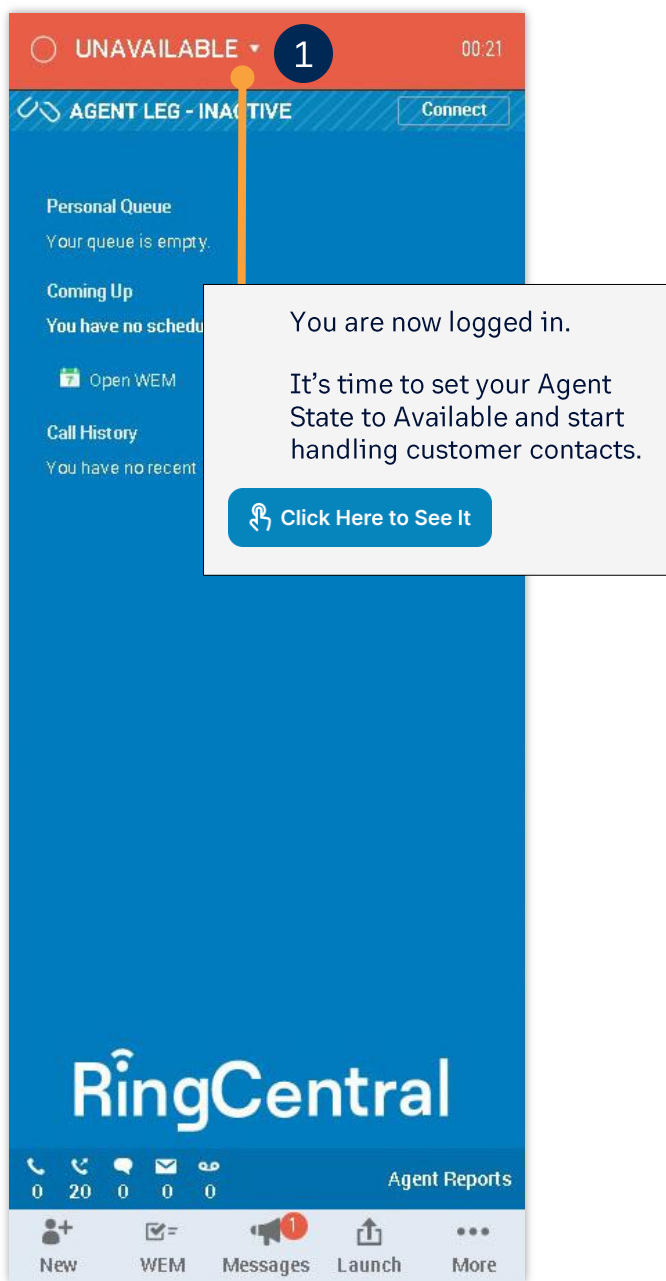
2762906

1 ☐ Remember Me

Enter or verify your **Station ID** and click **Connect**.

[Click Here to See It](#)

Initial Log In – Unavailable



Agent States

UNAVAILABLE 01:25

AVAILABLE 1

UNAVAILABLE Break

UNAVAILABLE Direct Line Call

UNAVAILABLE Extended Wrap Up

UNAVAILABLE Lunch

UNAVAILABLE Meeting

UNAVAILABLE Technical Issue

WORKING Happy Panda Auto Dialer

LOG OUT

Agent States indicate if you are available for customer contacts or why you are unavailable.

Select **Available** to handle customer contacts.

If you change your state during an active contact, it takes effect once the contact is over.

[Click Here to See It](#)

RingCentral

Agent Reports

New WEM Messages Launch More

Available – Ready for Contacts

AVAILABLE 00:21

AGENT LEG - INACTIVE [Connect](#)

Personal Queue
Your queue is empty.

Coming Up
You have no scheduled events today.

[Open WEM](#)

Call History

3034200330 00:26
Colorado Booking

Personal Queue lists interactions assigned to you, that you are not actively working.

As current interactions come to you, their information appears at the top of this section.

Call History lists information about your most recent calls.

Coming Up lists the call commitments in your schedule.

You are now ready for customer contacts.
Select something to explore.

1. [Queues](#)
2. [Agent Reports](#)
3. [Address Book](#)
4. [Messages](#)
5. [Launch](#)

Click to explore how to:

1. [Take inbound calls](#)
2. [Handle emails](#)
3. [Handle chats](#)
4. [Handle voicemails](#)
5. [Logging out](#)

RingCentral

1 2 3 4 5

0 0 0 0 Agent Reports

New WEM Messages Launch More

Queues

[Go Back and Explore More](#)

Select the call, chat, email, or voicemail icon in the **Queue** section to see their current queue status.

This section only shows skills that you are assigned.

AVAILABLE ▾00:21

AGENT LEG - INACTIVEConnect

Personal Queue
Your queue is empty.

Coming Up
You have no scheduled events today.
Open WEM

Call History

Active Queues: Phone

0 contacts waiting4 Skills

Ireland Billing

0 in queueNo wait

0

0

0

1

Ireland Booking

0 in queueNo wait

0

0

0

1

Ireland Sales

0 in queueNo wait

0

0

0

1

Ireland Support

0 in queueNo wait

0

0

0

1

0

20

0

0

0

Agent Reports

New

WEM

Messages1

Launch

More

Agent Reports

Agent Reports includes data on Performance, Productivity, and Assigned Skills.

[Click Here to See It](#)

AVAILABLE ▾00:21

AGENT LEG - INACTIVEConnect

Personal Queue
Your queue is empty

Agent Reports?

Performance (0%)>

0 Overall Contacts Handled

0 Inbound 0 Outbound

Productivity (0%)>

0%

0%

0%

0%

Assigned Skills (10)>

611

11

02000


Agent Reports

NewWEMMessagesLaunchMore


Agent Reports – Performance

Performance includes information about you and your team over a specified timeframe.

Information on Productivity is also available.

 [Click Here to See It](#)

● AVAILABLE ▾00:21

 AGENT LEG - INACTIVE

Connect

Personal Queue
Your queue is empty.

<Performance (0%)☆

Today

Yesterday

Last 7 Da...

Custom

	You	Team	% of Team
Inbound	0	0	0%
Outbound	0	0	0%
Overall	0	0	0%

📞0

📠20

💬0

✉0

📧0

Agent Reports

👤+

📧=

📢1

🚀

⋮

New

WEM

Messages

Launch

More

Agent Reports – Productivity

Productivity includes information about your Available, Working, and Unavailable metrics over a specified timeframe.

Information on your Assigned Skills is also available.

[Click Here to See It](#)

0 20 0 0 0

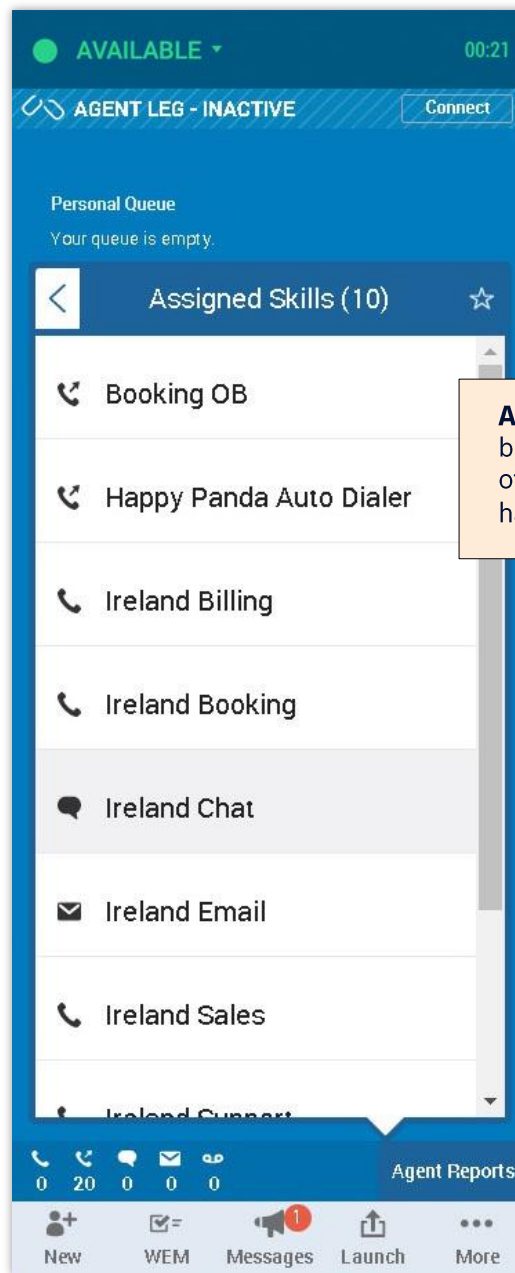
Agent Reports

New WEM Messages Launch More

Metric	Time	Percentage
Available	00:00:00	0%
Working	00:00:00	0%
Unavailable	00:00:00	0%

Agent Reports – Assigned Skills

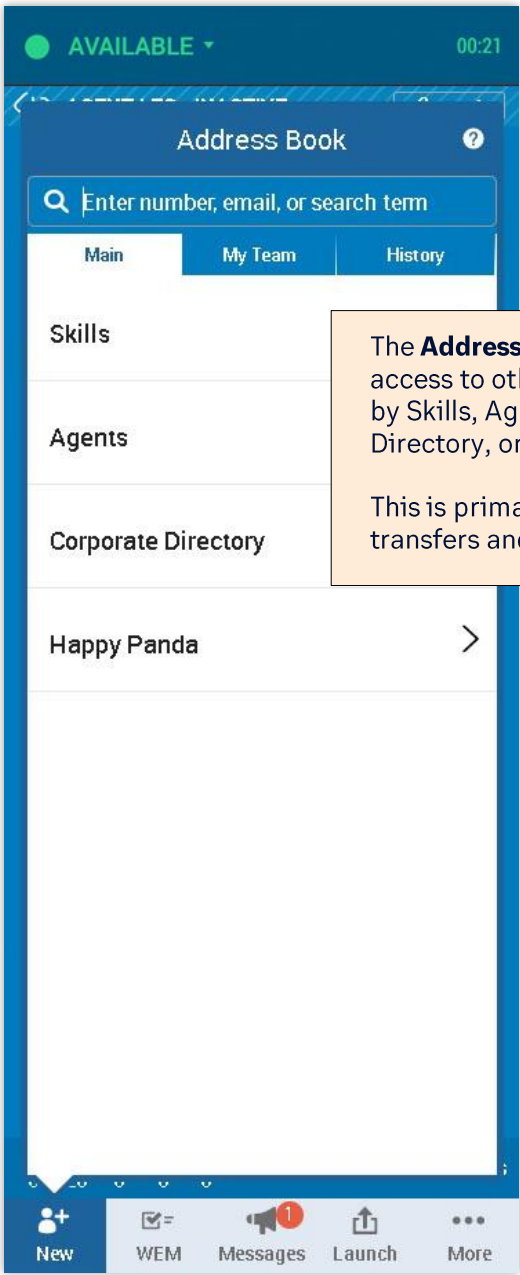
[Go Back and Explore More](#)



Assigned Skills includes basic information for all of the skills that you handle.

Address Book

[Go Back and Explore More](#)

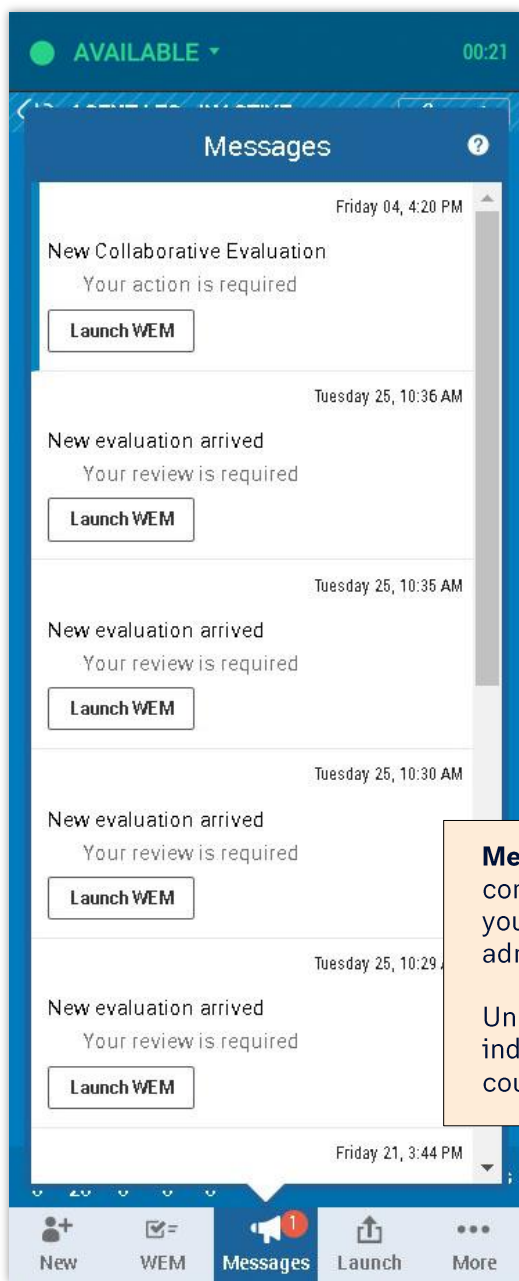


The **Address Book** provides access to other contacts, sorted by Skills, Agents, Corporate Directory, or custom lists.

This is primarily used for transfers and outbound contacts.

Messages

[Go Back and Explore More](#)

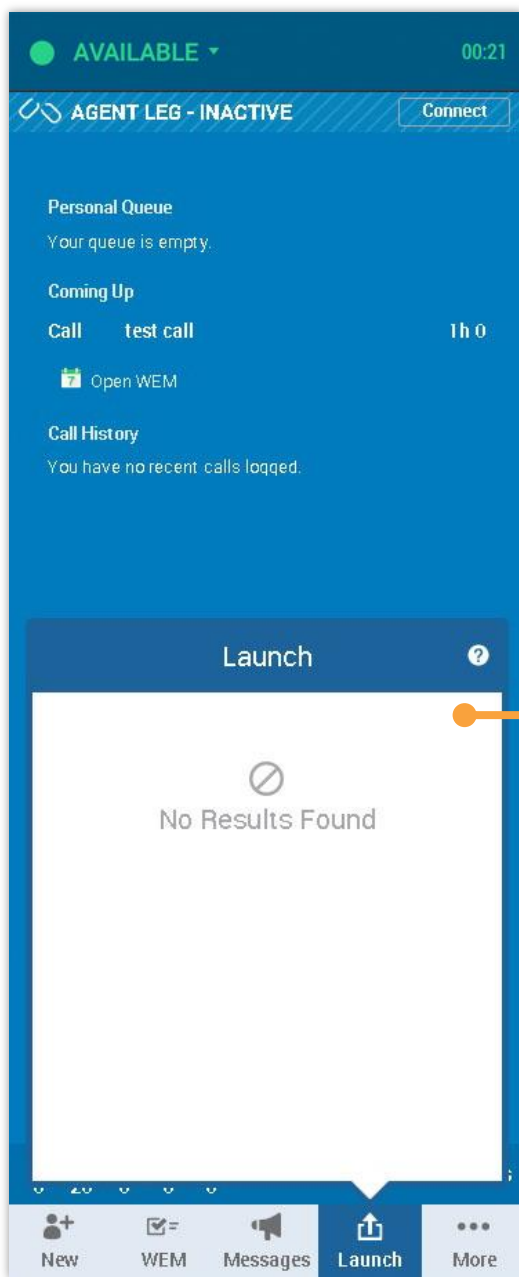


Messages displays communication from your supervisor or administrator.

Unread messages are indicated by a red counter icon.

Launch

[Go Back and Explore More](#)



If configured by your administrator, **Launch** contains custom links to websites you may need to help you work.

Take Inbound Calls – Establish the Agent Leg

The diagram illustrates the process of establishing an Agent Leg for an inbound call. It features two overlapping mobile app screens. The background screen shows an incoming call from an 'Unknown' caller with the number (720) 618-5618. The call duration is 0:02. The screen displays various call control buttons: Hold, Mute, Mask, Record, Transfer / Conf, Commit, Launch, and Hang Up. A red status bar at the top indicates 'Incoming 0:09'. A white box in the center of the screen displays 'Connecting Agent Leg' with a progress indicator. The foreground screen shows a call log entry for an 'Unknown caller' with the number (342) 420-0230. Below the number are two buttons: 'Ignore' (a red button with a minus sign) and 'More' (a green button with three dots). Below these are two buttons: 'To voicemail' (a red button with a voicemail icon) and 'Answer' (a green button with a phone receiver icon). An orange line connects the 'Answer' button to a blue button labeled 'Click Here to See It' in a white box. The white box contains the following text:

First, you need to establish the **Agent Leg** by answering your RingCentral app or physical phone.

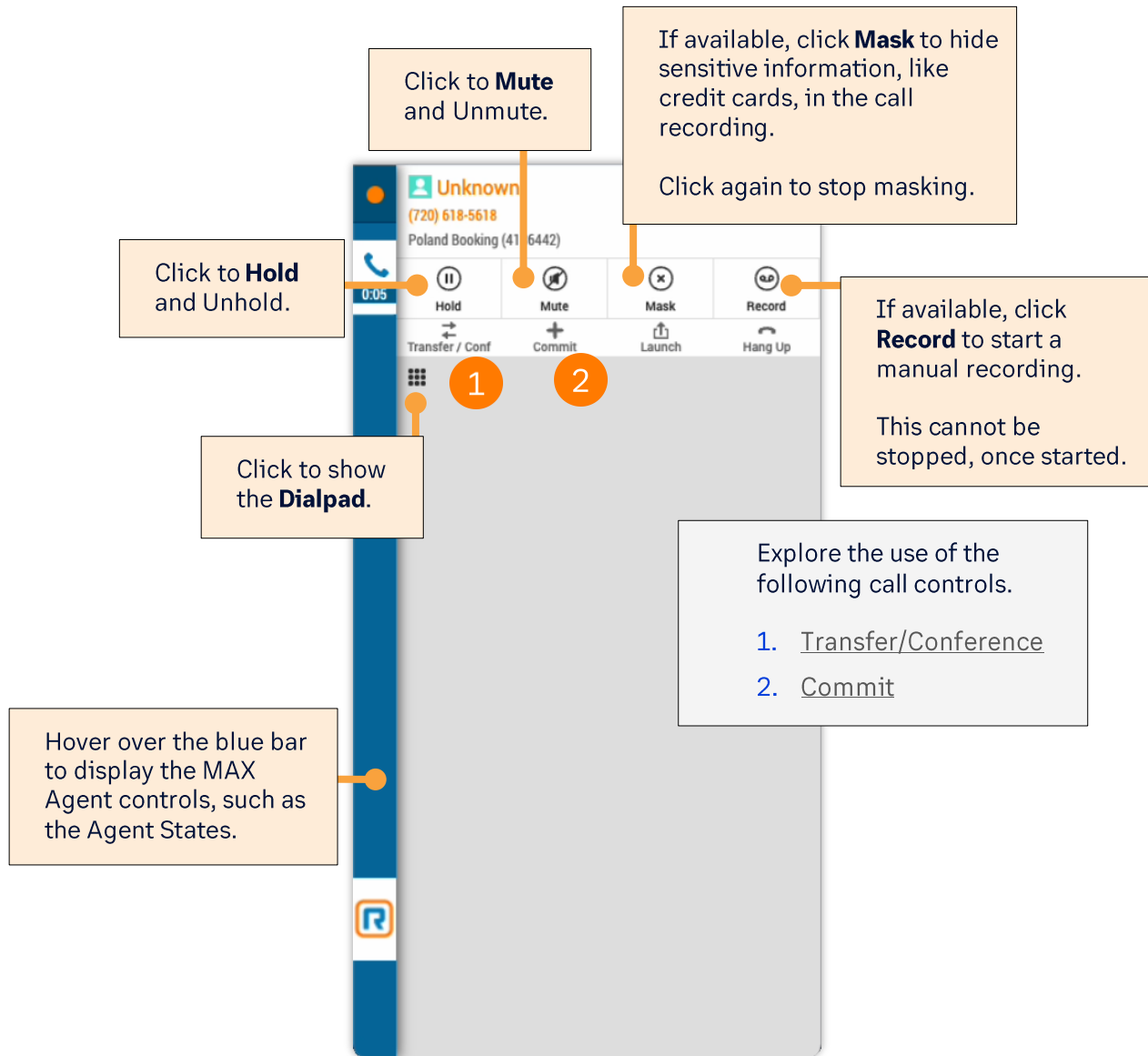
Once connected, all call controls happen within the MAX Agent.

This ensures that you can hear the call and that the Contact Center tracks and reports on the call.

[Click Here to See It](#)

Take Inbound Calls – Active Call

[Go Back and Explore More](#)



Transfer/Conference – Address Book

The screenshot displays the RingCentral MAX Agent interface. At the top, a call header shows 'Unknown' with the number '(784) 141-4141' and 'Ireland Sales (435436)'. Below this is a row of call controls: Hold, Mute, Mask, and Record. A second row contains Transfer/Conf, Commit, Launch, and Hang Up. An orange callout box points to the Mask and Record buttons, stating: 'These call controls can still be used.' The 'Transfer/Conf' button is highlighted with a blue arrow pointing to a callout box on the left. This box contains the text: 'Clicking **Transfer/Conf** displays the Address Book. Enter a number or make a selection from Skills, Agents, Corporate Directory, or any custom list shown.' Below this text is a blue button with a magnifying glass icon and the text 'Click Here to See It'. The 'Address Book' overlay is shown, featuring a search bar with the placeholder 'Enter number, email, or search term'. Below the search bar are four tabs: Main, Recent, Top Hits, and My Team. The 'Main' tab is selected, showing a list of categories: Skills, Agents, Corporate Directory, and Happy Panda, each with a right-pointing chevron.

These call controls can still be used.

Clicking **Transfer/Conf** displays the Address Book.

Enter a number or make a selection from Skills, Agents, Corporate Directory, or any custom list shown.

[Click Here to See It](#)

Address Book

Enter number, email, or search term

Main Recent Top Hits My Team

Skills >

Agents >

Corporate Directory >

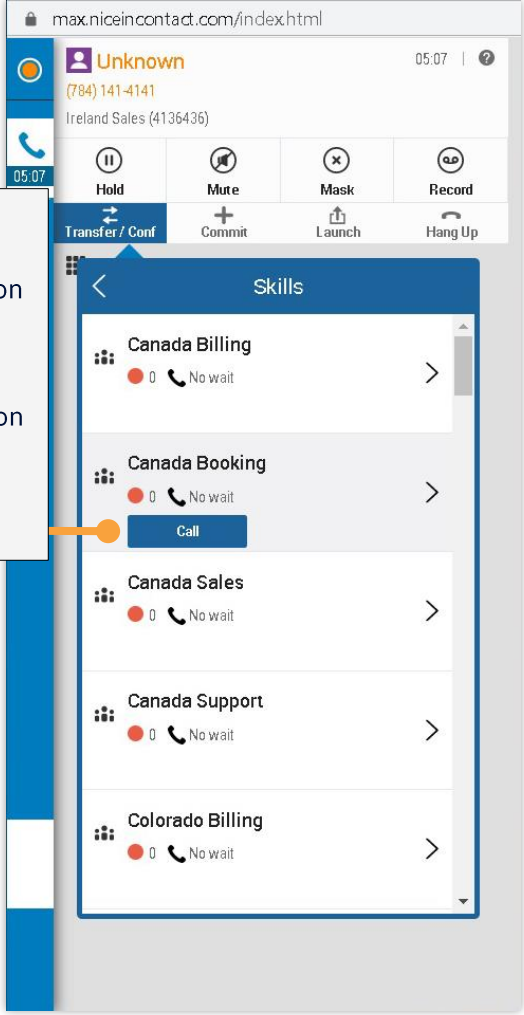
Happy Panda >

Transfer/Conference – Select Transfer Option

To start the transfer/conference, hover over the selection and click **Call**.

The original call is automatically placed on hold.

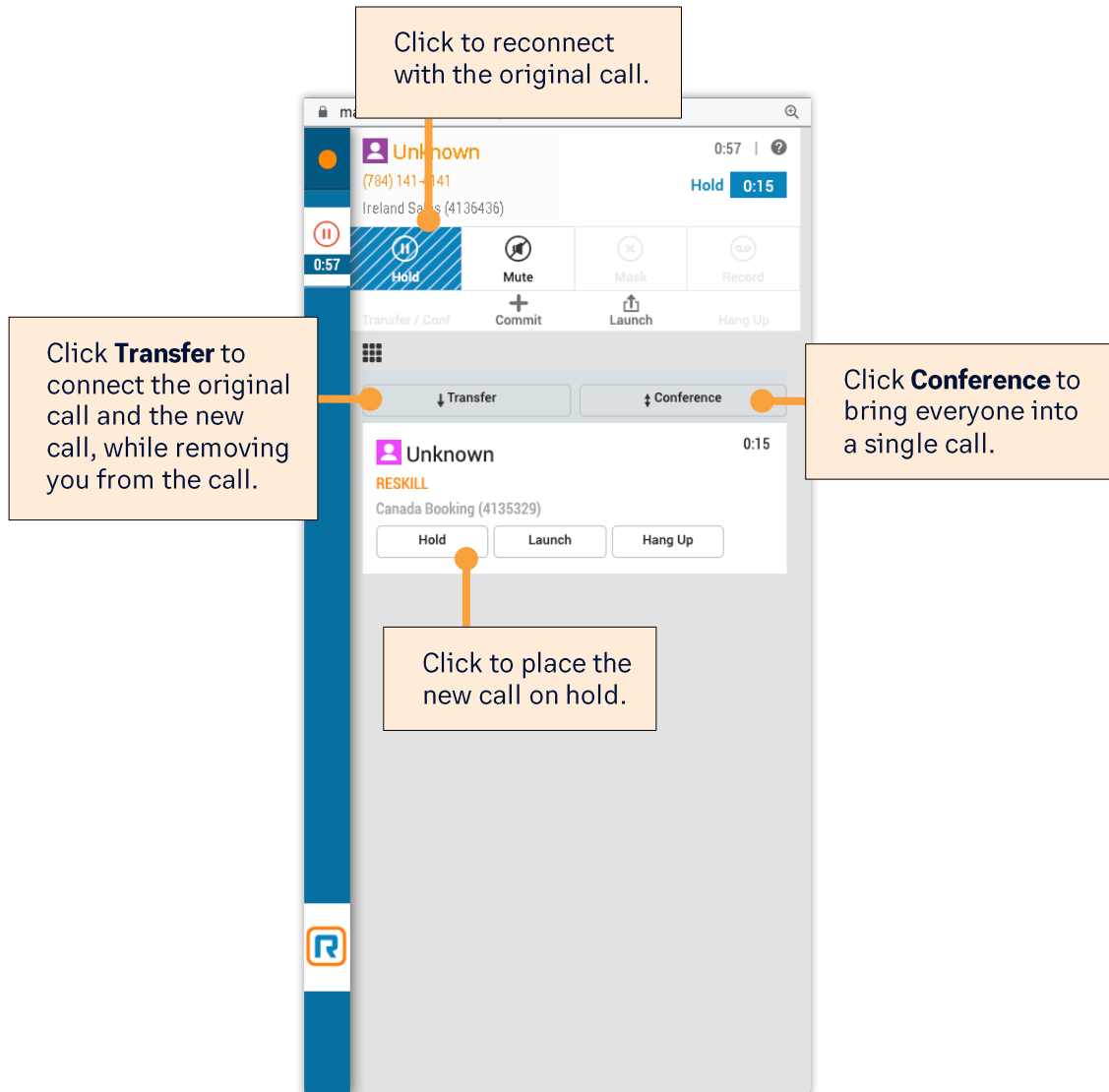
[Click Here to See It](#)



The screenshot displays the RingCentral MAX Agent interface. At the top, a call header shows the contact name 'Unknown' with a phone icon, the phone number '(784) 141-4141', and the extension 'Ireland Sales (4136436)'. The time '05:07' is shown in the top right. Below the header is a toolbar with icons for 'Hold', 'Mute', 'Mask', 'Record', 'Transfer / Conf', 'Commit', 'Launch', and 'Hang Up'. The 'Transfer / Conf' button is highlighted with a blue bar. Below the toolbar, a 'Skills' panel is open, showing a list of skills: 'Canada Billing', 'Canada Booking', 'Canada Sales', 'Canada Support', and 'Colorado Billing'. Each skill entry includes a red dot, a '0' in a circle, and the text 'No wait'. A blue 'Call' button is positioned below the 'Canada Booking' skill entry. An orange arrow points from the 'Click Here to See It' button in the text box to the 'Call' button in the skills panel.

Transfer/Conference

[Go Back and Explore More](#)



Scheduling Commitments

max.niceincontact.com/index.html

Unknown
(784) 141-4141
Ireland Sales (4136436)

08:00

Hold Mute Mask Record
Transfer / Conf Commit Launch Hang Up

Schedule a commitment

Test Call

(784) 141-4141

Schedule for Me Skill

Support OB

02/07/2022 01 : 35 pm

(GMT-05:00) Eastern Time (US & Canada)

Notes

Save

Fill out all of the information, paying special attention to:

- **Schedule for** – you or a Skill
- Accurate Time and Date

Note: If committing to a Skill and you handle more than one Skill, you must use the Skill dropdown.

Click **Save** to set the commitment.

Commit allows you to schedule callbacks to customers.

Click to see what happens when a commitment is due.

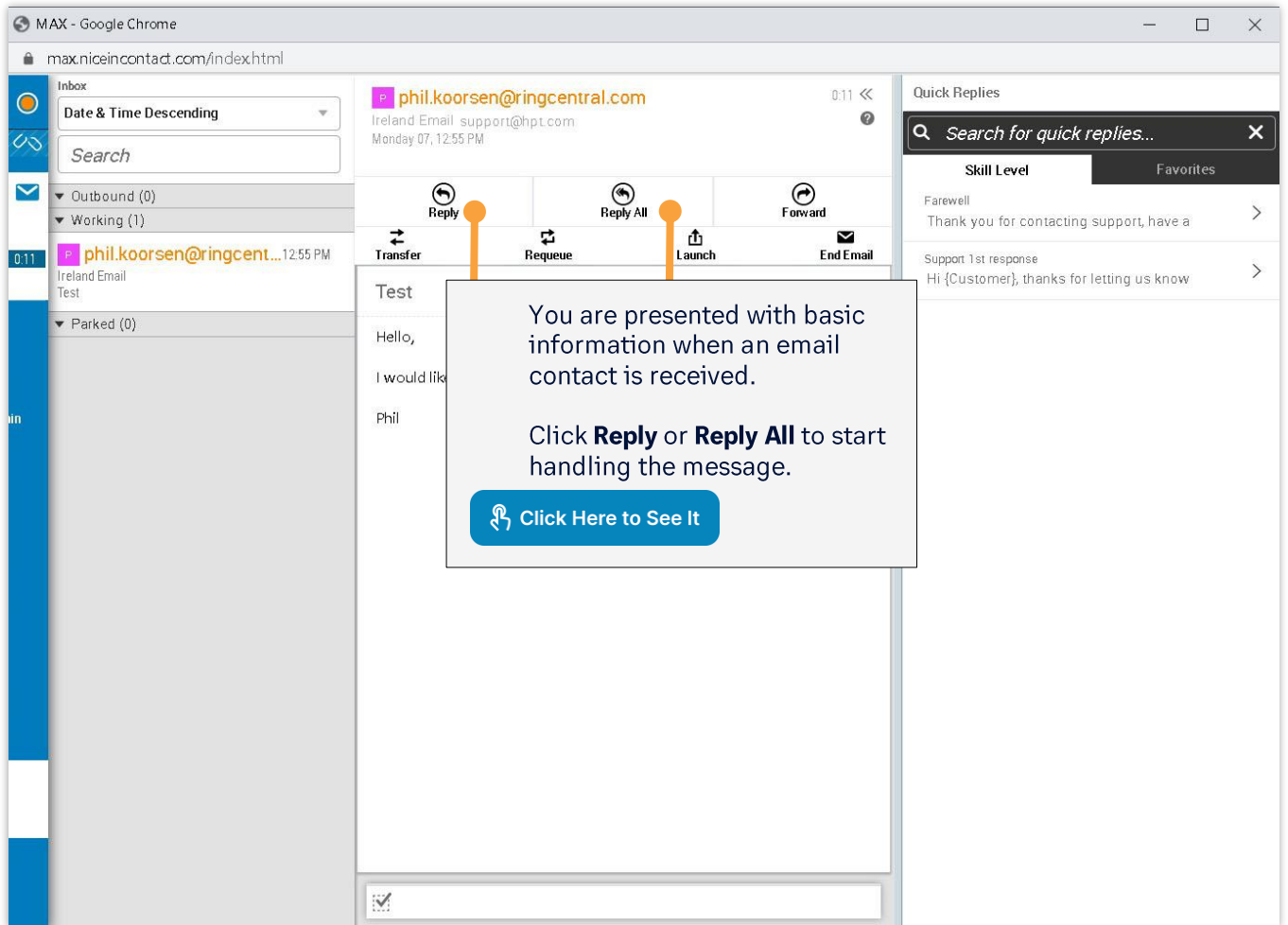
[Click Here to See It](#)

Commitment Due

[Go Back and Explore More](#)



Initial Email Contacts



Handling Emails

[Go Back and Explore More](#)

The screenshot displays the RingCentral MAX Agent interface in a Google Chrome browser window. The interface is divided into several sections: a left sidebar with navigation icons, a top header with a search bar, a central email composition area, and a right sidebar with a 'Quick Replies' panel. Five callout boxes provide instructions on how to use the interface:

- After completing your email response, click **Send**.** (Points to the 'Send' button in the top right of the email composition area.)
- Click **End Email** when no further responses are needed.** (Points to the 'End Email' button in the top right of the email composition area.)
- Use these controls to format the text, provide links, or add attachments.** (Points to the rich text editor toolbar in the email composition area.)
- Type the response in the **Message** section.** (Points to the text input area in the email composition area.)
- Save time by accessing prepared responses with **Quick Replies**.** (Points to the 'Quick Replies' panel on the right sidebar.)

The email composition area shows a draft email with the following details:

- From:** phil.koorsen@ringcentral.com
- To:** hpt@mail.r
- Subject:** Test
- Body:** Hello, I would like to buy your Red Gonkulator! Phil

The 'Quick Replies' panel on the right sidebar shows a search bar and a list of prepared responses, including 'Farewell' and 'Support: 1st response'.

Handling Chats

[Go Back and Explore More](#)

The screenshot displays the MAX Agent interface in a Google Chrome browser window. The interface is divided into several sections:

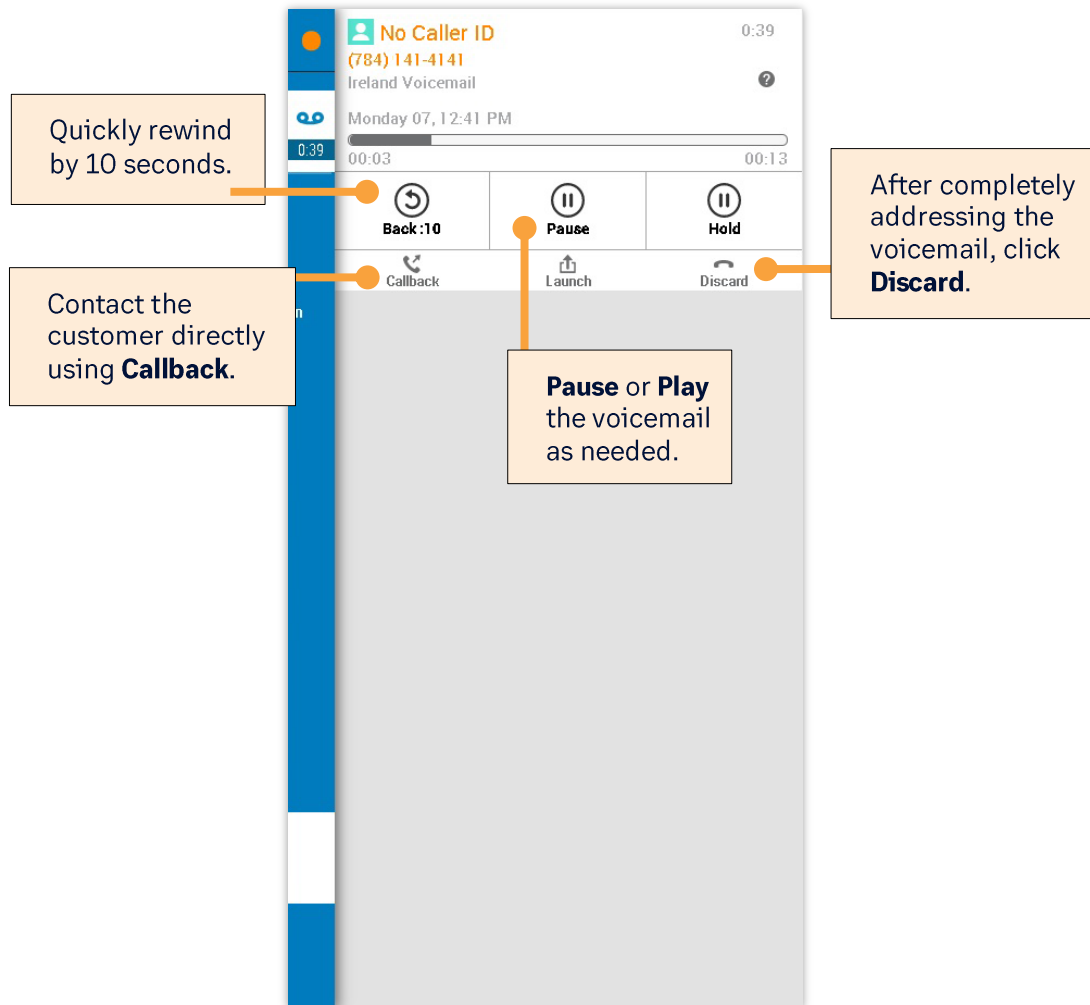
- Left Sidebar:** Contains navigation icons for chat, messages, and other functions.
- Top Bar:** Shows the agent's name "Phil k" and the customer's name "Ireland Chat (4136441)".
- Chat Area:** Displays the chat history. The chat started at 12:47 PM. A system message at 12:47 PM says "Customer Name: Phil k -- Region: Ireland". A message from "Me" at 12:52 PM says "Thank you for contacting support, have a great day and please contact us again if you have anything else that we can help with.". A new message from "Phil k" at 12:53 PM says "Hello".
- Bottom Bar:** Contains buttons for "Transfer", "Launch", and "End".
- Quick Replies Panel:** Located on the right, it has a search bar "Search for quick replies..." and two tabs: "Skill Level" and "Favorites". Under "Skill Level", there are two quick replies: "Farewell" (Thank you for contacting support, have a great day and ple...) and "Support 1st response" (Hi {Customer}, thanks for letting us know about your issues...).

Four callout boxes provide instructions:

- Transfer:** "If the chat is better handled by someone else, **Transfer** it to them."
- End:** "Click **End** when no further responses are needed."
- Quick Replies:** "Save time by accessing prepared responses with **Quick Replies**."
- Message Section:** "Type the response in the **Message** section."

Handling Voicemails

[Go Back and Explore More](#)



Logging Out

[Go Back and Explore More](#)

The screenshot shows the RingCentral MAX Agent interface. A central overlay displays the 'Agent States' list with the following items:

- AVAILABLE (Green dot)
- AVAILABLE (Green dot)
- UNAVAILABLE Break (Red dot)
- UNAVAILABLE Direct Line Call (Red dot)
- UNAVAILABLE Extended Wrap Up (Red dot)
- UNAVAILABLE Lunch (Red dot)
- UNAVAILABLE Meeting (Red dot)
- UNAVAILABLE Technical Issue (Red dot)
- WORKING Happy Panda Auto Dialer (Yellow dot)
- LOG OUT** (Red dot, highlighted with a blue circle and the number 1)

A callout box provides instructions:

When you are ready to logout:

1. Select **Log Out** from the Agent States list
2. Click **Log out** on the confirmation message

The confirmation message is shown at the bottom right:

Log out confirmation
Are you sure you want to log out?

Buttons: Log out, Cancel

The RingCentral logo is visible at the bottom of the overlay.