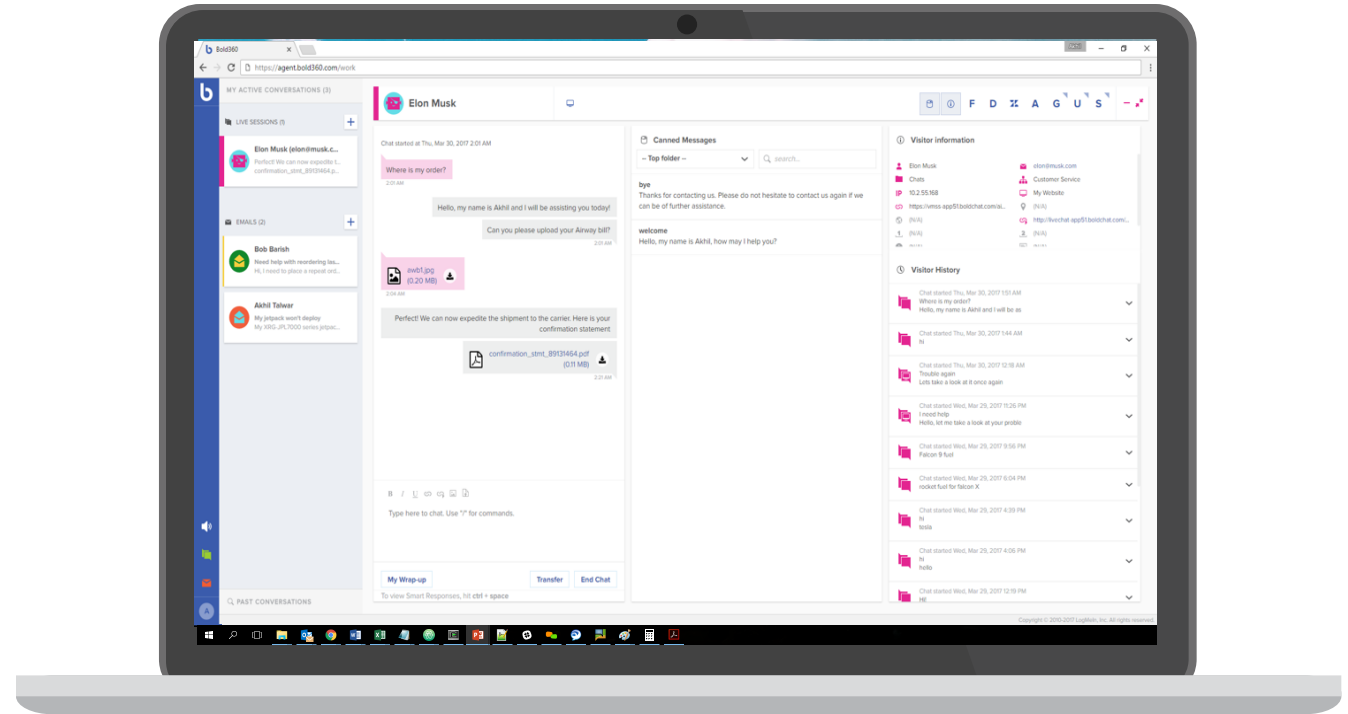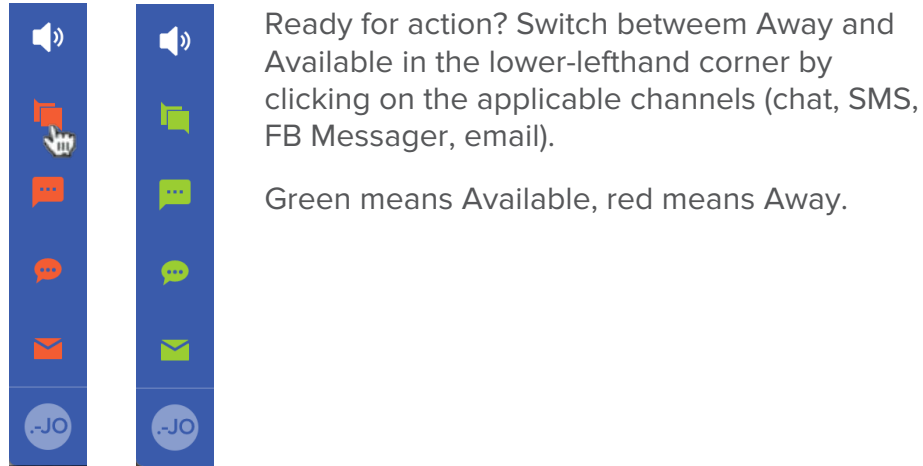# Introducing the Agent Workspace

Bold360's Web Workspace is intentionally designed for maximum speed and efficiency. The interface is optimized for agents to more easily multi-task across all interactions with a simple, transparent view of multiple customer engagements. It's also easy to use and fast with shortcuts designed to keep the agents' hands on the keyboard – resolving customers' needs quickly.

Utilize the Web Workspace today to increase agent efficiency, serve more customers, and improve results. It's never been easier to engage your customers across channels and devices efficiently and effectively.

1. Get started by logging in at: agent.bold360.com

2. Learn the basics by reading the instructions below

bold360

Available

Ready for action? Switch betweem Away and Available in the lower-lefthand corner by clicking on the applicable channels (chat, SMS, FB Messager, email).

Green means Available, red means Away.

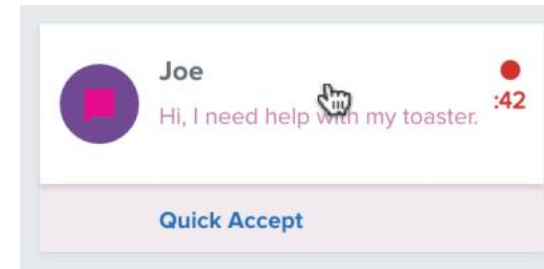## Switch between channels

Click any chat, message or email to open it in your workspace. The active item is highlighted along its left edge.
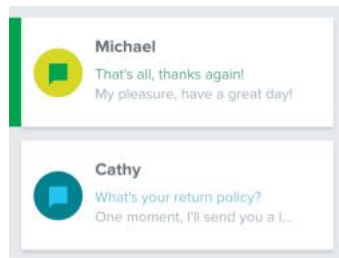
Tip: The top item on the list may be the most urgent (newest chat/message, oldest email)

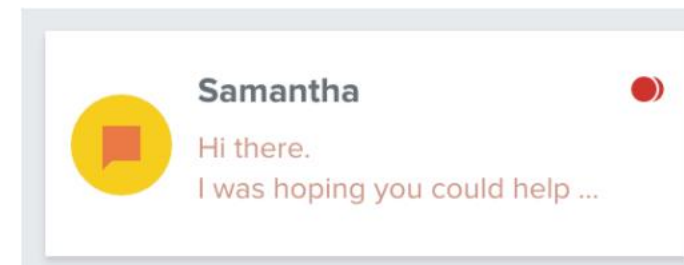## Quick Accept

Grab a chat without working on it right away.

Click Quick Accept to accept without working on it right away. Or click anywhere else to accept and move to your workspace.

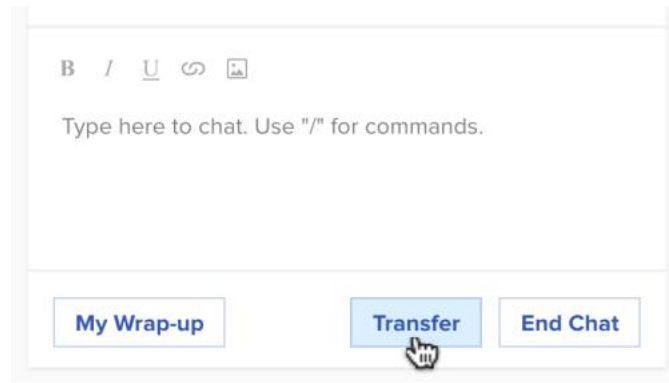**Tip:** When the timer runs out, the chat is reassigned.

Red spot?

The red spot tells you the customer is waiting for your reply.

Notice we show you the first few lines of the customer's message.
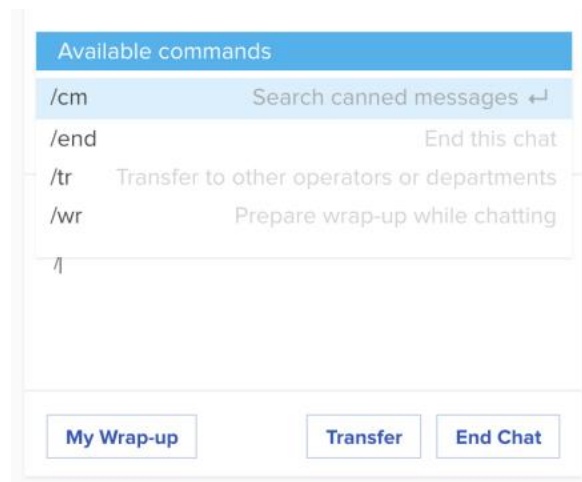
Transfer a chat

To transfer a chat to another team member, click the Transfer button at the bottom of the chat panel and select an available department or operator from the list.

My Wrap-up

Prepare your wrap-up without ending the chat.

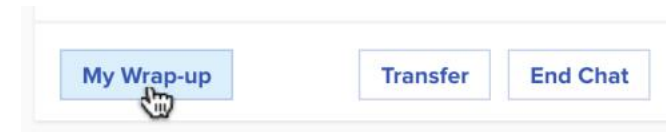When the customer needs you, click Back to chat.

Chat commands

In the chat panel, type a slash ("/") to see the list of commands. Your administrator can also set up /slash commands for canned messages.

End a chat

To end a chat, click the End Chat button at the bottom of the chat panel
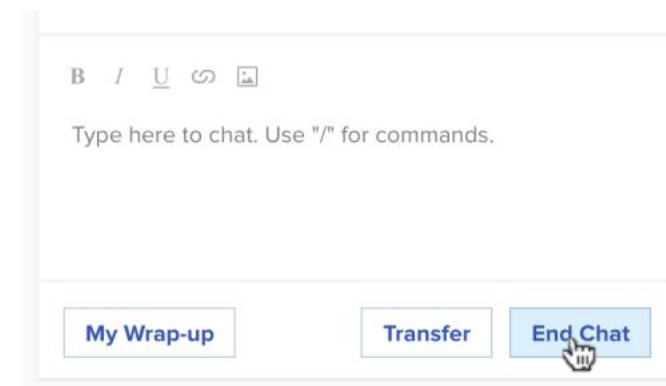
Tip: You can also use the /end chat con