Better Connections by Design

COEO EmpowerUC™ Desktop

Omnichannel Contact Center
Agent & Supervisor Guide

COEO Solutions

July 2026

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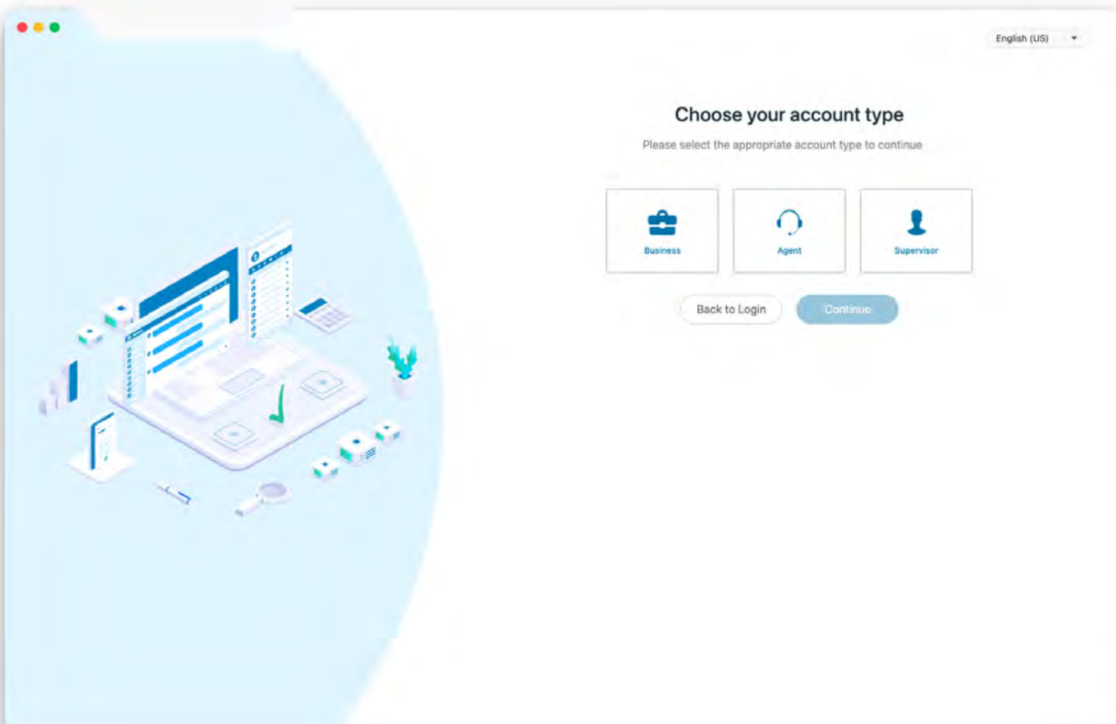
Getting Started

This guide picks up where the *COEO EmpowerUC™ Desktop Business User Guide* leaves off. It assumes you're already familiar with the general Desktop client — logging in, navigating the interface, and using core features like Voice, Team Chat, and Contacts. If you haven't already, it's worth reviewing that guide first.

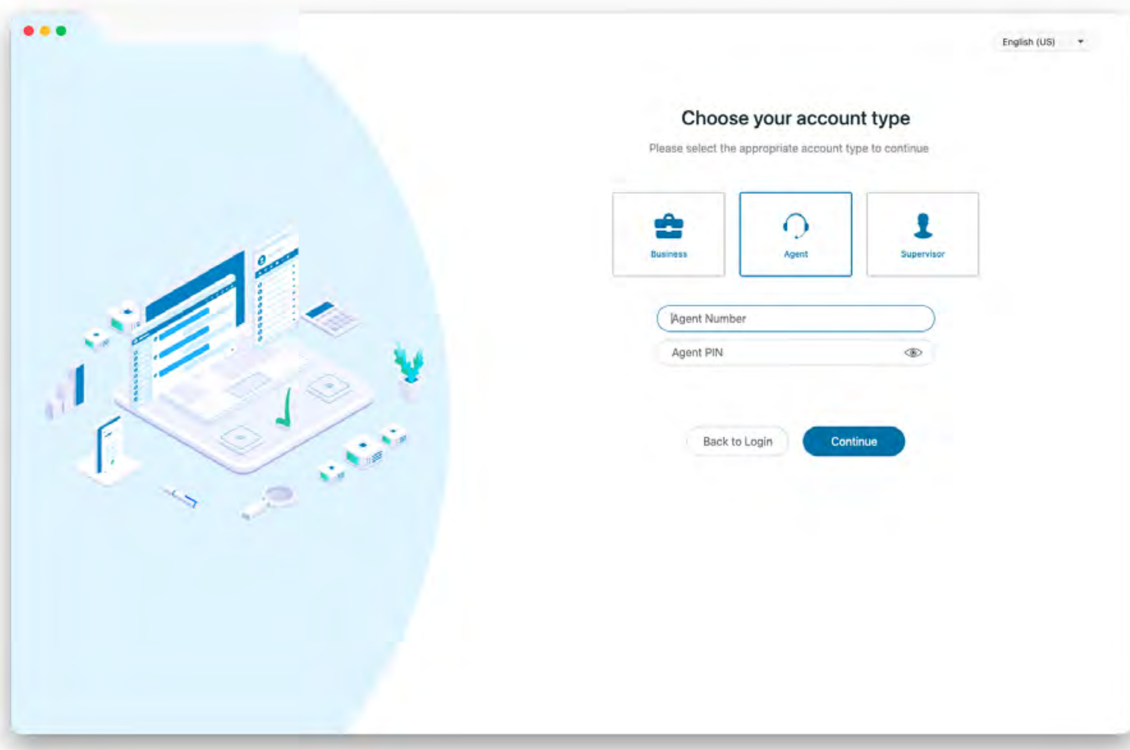
What follows here is specific to the Omnichannel Contact Center tools available to Agents and Supervisors.

Signing In as an Agent or Supervisor

After entering your email and password on the login screen, you'll be asked to choose your account type. Select Agent or Supervisor, depending on your role. Once you do, two additional fields will appear where you can enter your Agent Number and PIN.



Choose your account type



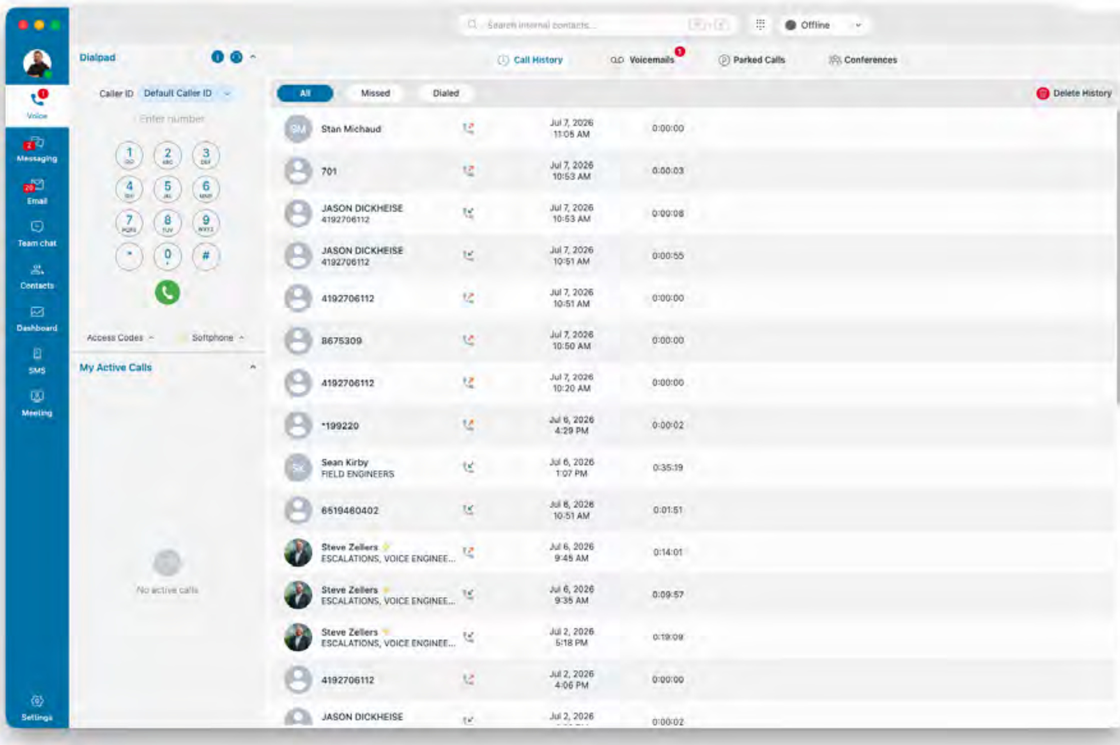
Agent selected, with Agent Number and Agent PIN fields shown

- **Agent Number** — A unique identifier assigned to you personally within the contact center. If you don't know yours, check with your supervisor or administrator.
- **Agent PIN** — A separate PIN some organizations require for an extra layer of security. Most organizations don't use this — if the field isn't required, you can leave it blank.

Click Continue to finish signing in.

Getting Around: The Agent/Supervisor View

Once you're logged in as an Agent or Supervisor, you'll notice a few additions to the left-hand navigation that aren't covered in the Business User Guide. Everything else — Voice, Team Chat, Contacts, SMS, and Meeting — works exactly the way it's documented there.



The Agent/Supervisor view, with Messaging, Email, and Dashboard added to the navigation

Here's what's new:

Messaging is where you'll handle live chat and SMS conversations coming in through the contact center's queues. This is different from Team Chat, which is for messaging your colleagues — Messaging is for customer conversations.

Email works the same way for email — this is where contact center messages routed to your queues land, separate from any personal email account you might use elsewhere.

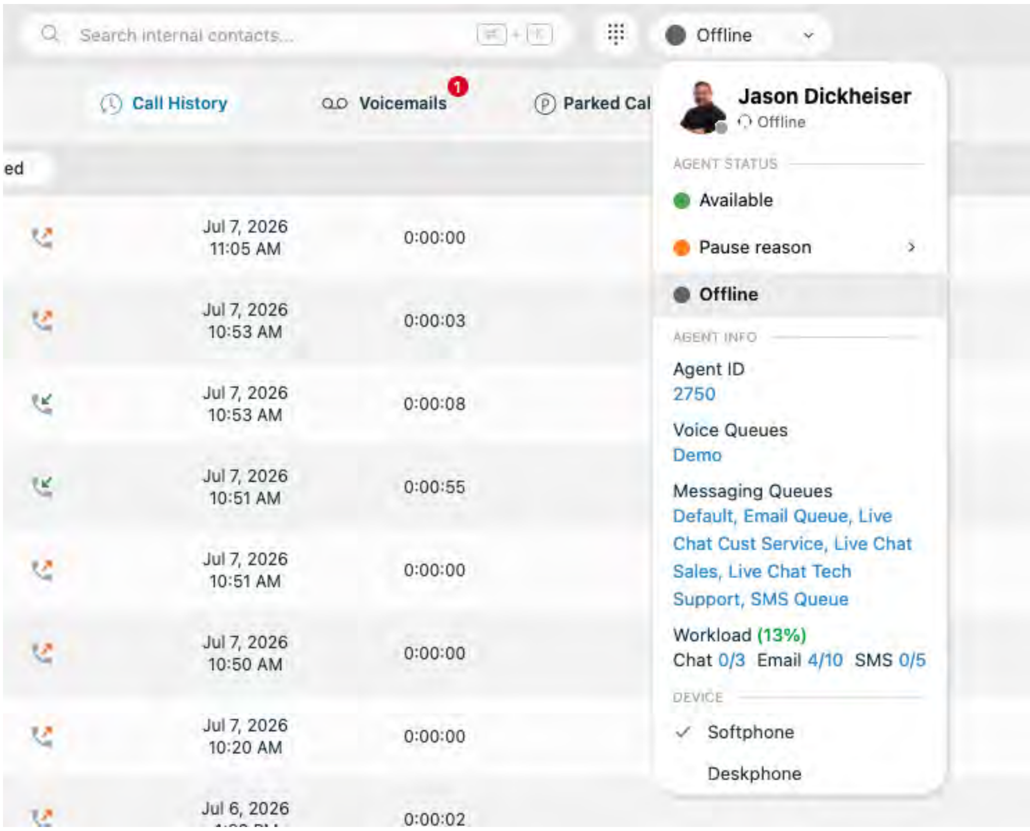
Dashboard gives you a live view of your queues, your team, and how your day is going. There's a lot here, so we'll walk through it in its own section a little later.

You'll also notice your presence indicator in the top-right corner does more than it used to. Beyond just setting yourself Available or Away, it's now how you log into and out of your queues and let your team know when you've stepped away. We'll cover that next.

Agent Status

Your presence indicator, found in the top-right corner next to your name, introduces a dropdown menu specific to Contact Center Agents and Supervisors. From here, you can log into and out of your queues, choose a pause reason when you step away, and check your current workload at a glance.

Click your status (for example, Available or Offline) in the top-right corner to open this menu.



Agent Status dropdown menu

Setting Your Status

At the top of the menu, under Agent Status, you have three options:

- **Available** — You're logged in and ready to receive conversations across your assigned channels.
- **Pause Reason** — Choose this when you need to step away without logging all the way out. Hovering over this option opens a submenu of pause reasons — things like Lunch, Washroom, or Coaching. Your organization sets up this list, so the exact reasons you see may differ from one team to another. While paused, you won't receive new conversations, but you'll still show as logged into your queues.
- **Offline** — Logs you out of your queues entirely. You won't receive any new conversations until you set your status back to Available.

> 💡 **Note:** Choosing an accurate pause reason helps your supervisor understand team availability at a glance — it's worth taking the extra second to pick the right one rather than defaulting to the first option in the list.

Agent Info

Below your status options, this section gives you a quick reference for your own setup:

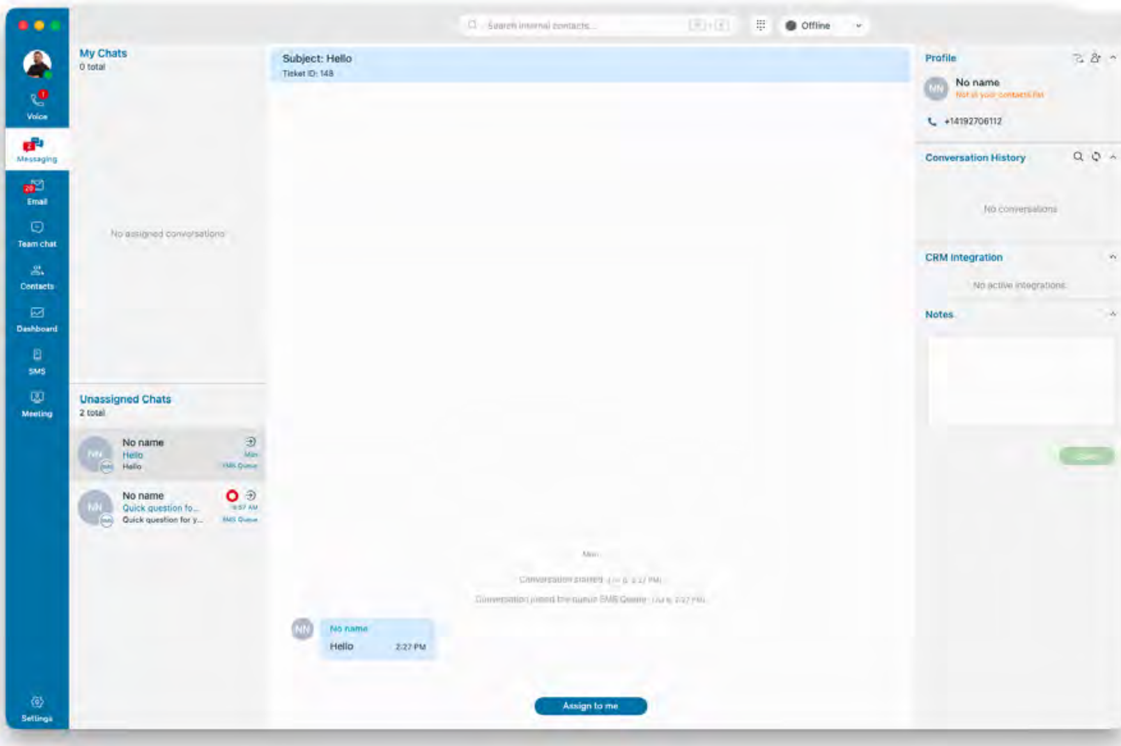
- **Agent ID** — Your unique agent number, the same one you entered at login.
- **Voice Queues** — The voice queue(s) you're assigned to.
- **Messaging Queues** — The chat, SMS, and email queues you're assigned to.
- **Workload** — Your current combined workload percentage, along with a breakdown of how many active conversations you're handling per channel out of your maximum allowed.

Device

At the bottom of the menu, you can choose whether calls ring to your Softphone (the app itself, using your headset or computer's microphone and speakers) or your Deskphone (a physical desk phone, if your organization has one set up for you). A checkmark shows which one is currently active. Switch between them any time your setup changes — for example, if you move from your desk to a space without a deskphone.

Messaging

Messaging is where you'll handle Live Chat and SMS conversations coming in through your assigned queues. You'll find it in the left navigation bar, with a badge showing how many conversations are waiting.



Messaging conversation view

My Chats and Unassigned Chats

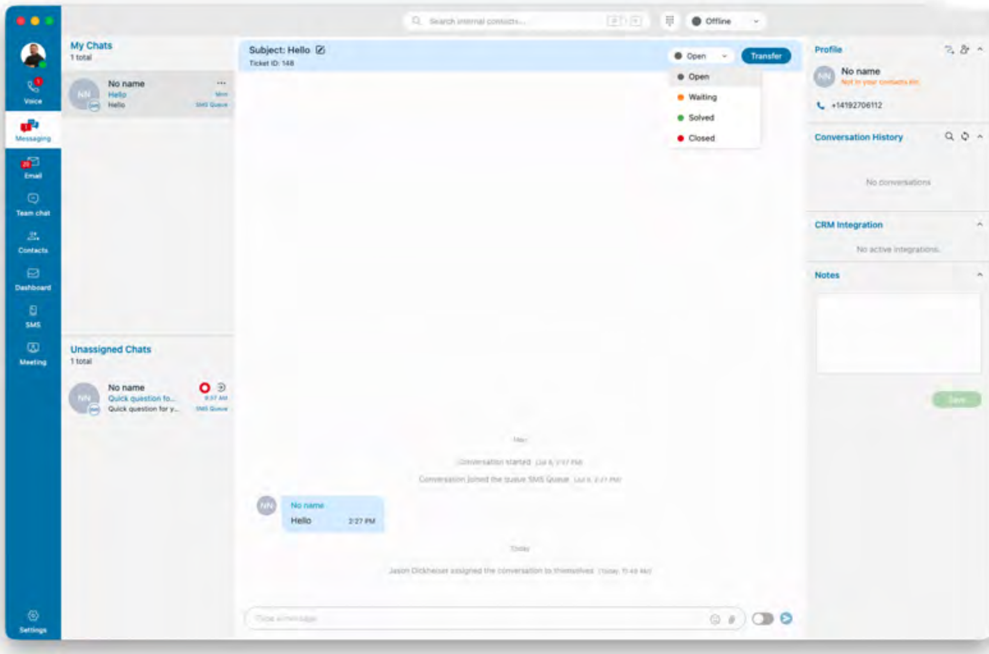
The left panel is split into two lists:

- **My Chats** — Conversations currently assigned to you.
- **Unassigned Chats** — Conversations waiting to be picked up. Depending on how your queue is configured, conversations here may be automatically assigned to an available agent, or they may sit here until an agent claims one manually. If manual pickup applies to your queue, opening an unassigned conversation will show you an Assign to me button — click it to claim the conversation and move it into My Chats.

Working a Conversation

Click a conversation to open it in the center panel. Here you'll see the full message history, along with the ticket subject and ID at the top.

- **Status dropdown** — Located next to the subject line, this lets you set the conversation's current status: Open, Waiting, Solved, or Closed. Keeping this updated helps your team (and any reporting your supervisor relies on) reflect where things actually stand.

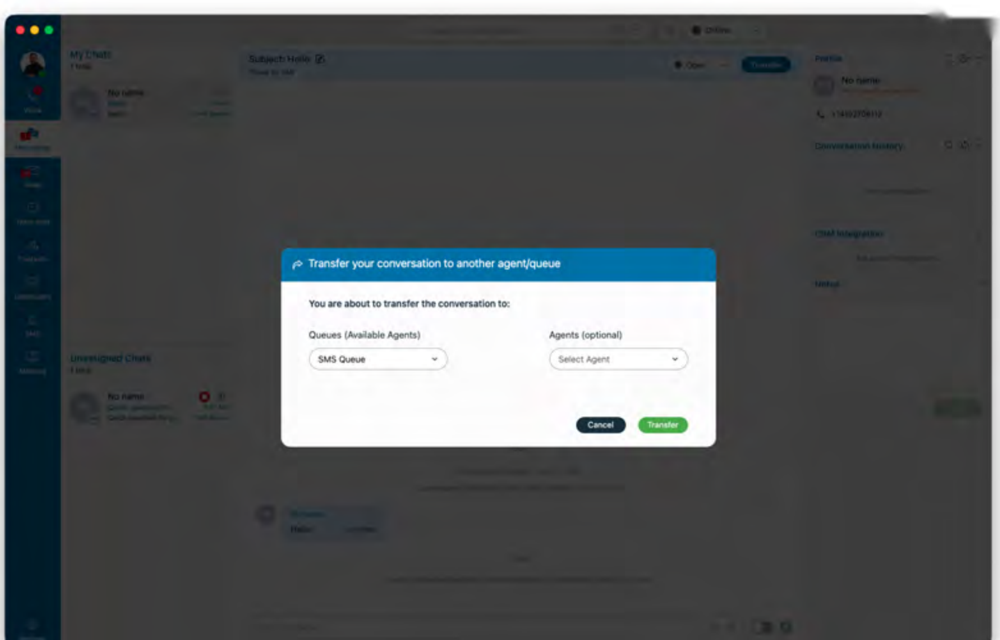


Conversation status dropdown

- **Message box** — Type your reply at the bottom of the conversation. You can add emojis and attachments using the icons next to the text field. Next to the send button, a toggle switches your message between public (sent to the customer) and private (visible only to your team) — useful if you need to loop in a supervisor or teammate for help without the customer seeing it.

Transferring a Conversation

Click Transfer in the top-right corner to hand a conversation off.



Transfer modal

A window opens with two options:

- **Queues (Available Agents)** — Choose a queue to send the conversation back into. It'll land in that queue's Unassigned Chats, available for anyone assigned to it.
- **Agents (optional)** — Instead of (or in addition to) picking a queue, you can select a specific agent. If you choose an agent directly, the conversation is assigned straight to them, regardless of which queue they belong to.

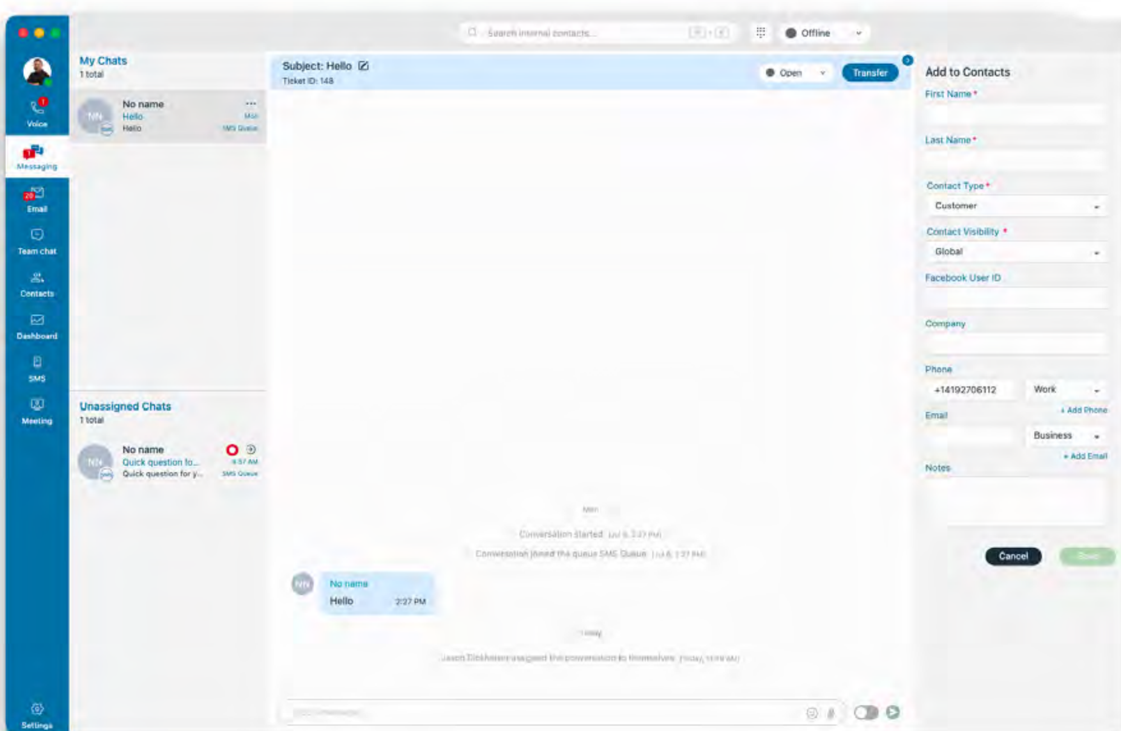
Click Transfer to confirm, or Cancel to back out.

Adding or Linking a Contact

Next to Transfer, you'll find two icons for connecting a conversation to a contact record.

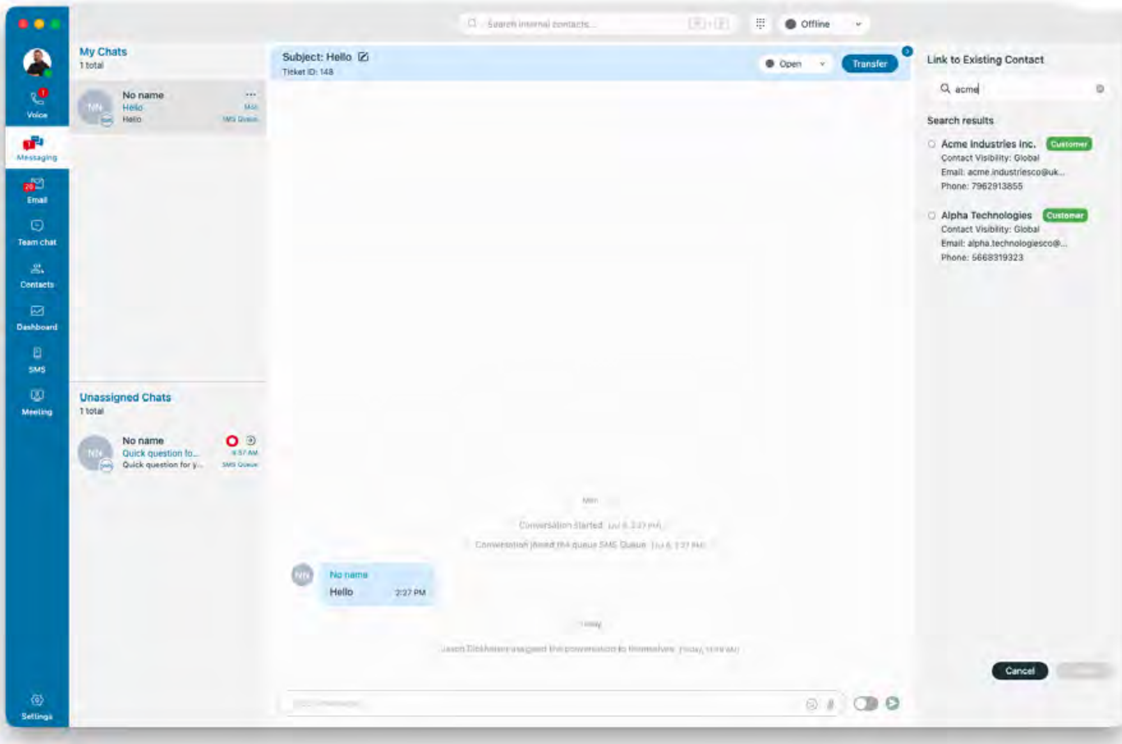
Add to Contacts creates a brand-new contact from this conversation. You'll be asked for:

- **First Name** and **Last Name** (required)
- **Contact Type** — For example, Customer.
- **Contact Visibility** — Controls who can see this contact. Global makes it visible across your organization; Private keeps it visible only to you. Depending on how your organization has things configured, you may also see a Department option.
- **Facebook User ID** — Fills in automatically if this conversation came through Facebook.
- **Company**
- **Phone** and **Email** — You can label each one (like Work or Business) and add more than one of each using the + Add Phone / + Add Email links.
- **Notes** — Any context worth saving about this contact. If your organization has a CRM integration set up to sync notes, anything you save here can also be pushed to your CRM.



Add to Contacts panel

Link to Existing Contact does the opposite — instead of creating a new record, it connects this conversation to a contact that already exists, either in your EmpowerUC™ Contacts or in your CRM (if your organization has one integrated). Search by name, select the matching result, and click Link.

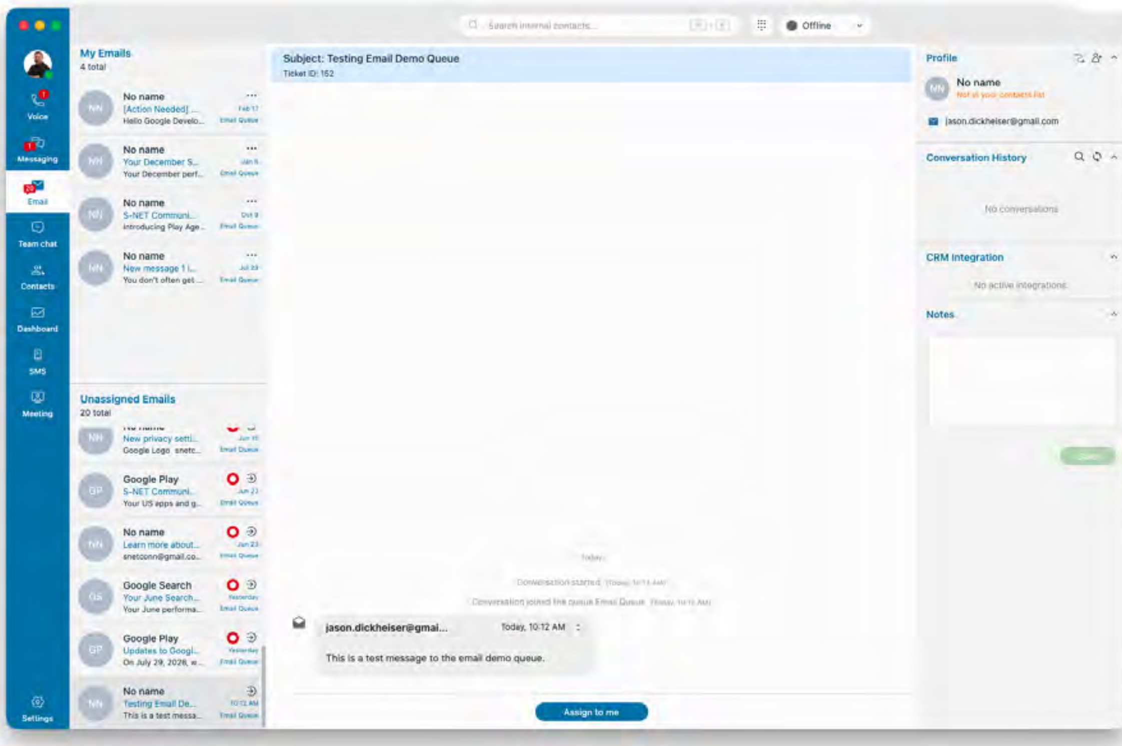


Link to Existing Contact panel

💡 **Note:** Messaging in this guide is strictly inbound — customers reach out to you through a queue. There's currently no way to start a new outbound chat or SMS conversation from this screen.

Email

Email works much like Messaging, with one key difference: instead of typing freely into an open conversation, you'll compose formal replies using Reply, Reply All, or Forward.



Email conversation view

My Emails and Unassigned Emails

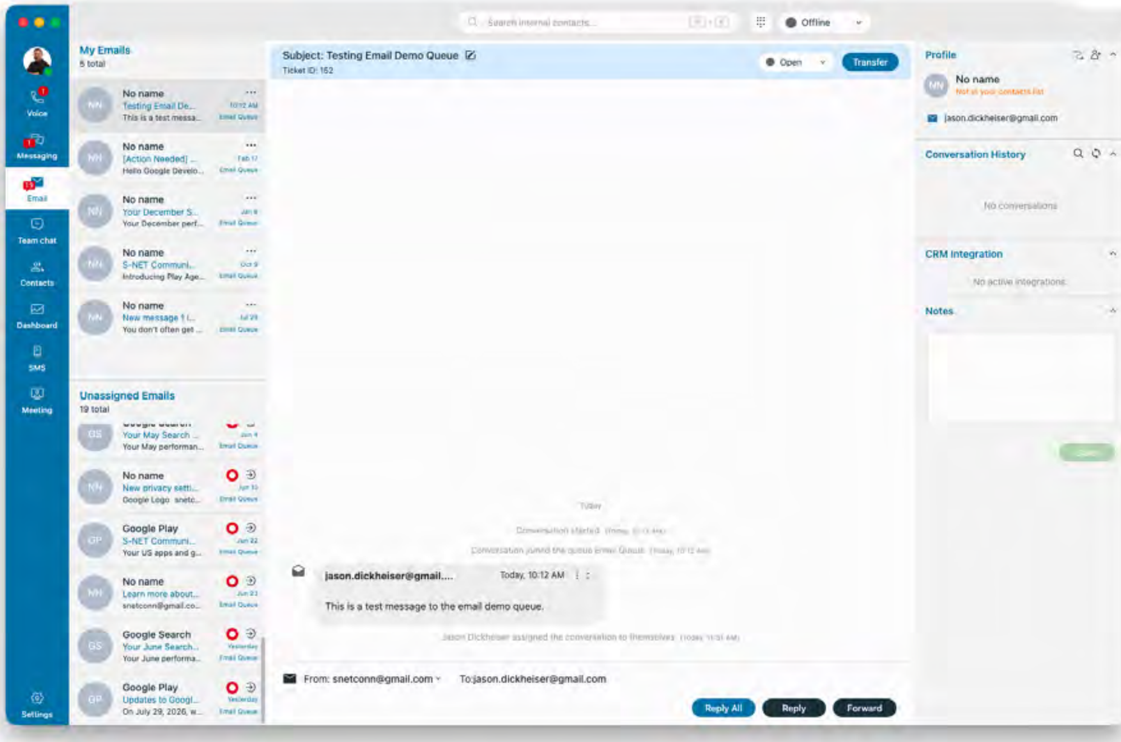
Just like Messaging, the left panel is split into two lists:

- **My Emails** — Emails currently assigned to you.
- **Unassigned Emails** — Emails waiting to be picked up. Depending on your queue's configuration, these may be auto-assigned or claimed manually, the same way Messaging conversations are.

Working an Email

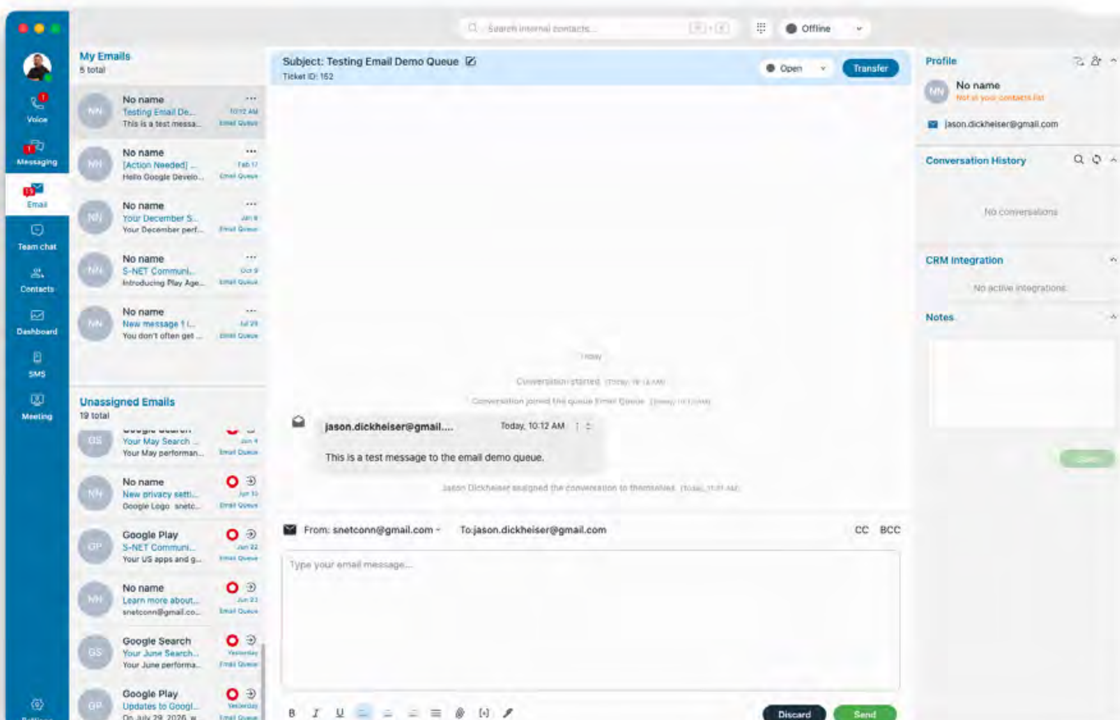
Click an email to open the full conversation thread in the center panel, with the subject and ticket ID at the top — the same Status dropdown (Open, Waiting, Solved, Closed) and Transfer button from Messaging work the same way here.

Unlike Live Chat or SMS, you can't send a message "on the fly" in Email — you'll need to click Reply, Reply All, or Forward to open the compose window.



Reply, Reply All, and Forward buttons

Once you click one of those, a full compose window opens below the thread:



Email compose window

- **Formatting toolbar** — Bold, italic, underline, text alignment, bullet and numbered lists, and a signature tool, so your replies can be styled like a normal email.
- **Attachment icon** — Attach a file to your reply.
- **CC / BCC** — Add additional recipients, just like a standard email client.
- **Discard** — Cancel your reply without sending.
- **Send** — Sends your reply to the customer.

Adding or Linking a Contact, Notes, and CRM

The right-hand panel works identically to Messaging — you can add the sender as a new contact, link them to an existing contact, and leave notes that sync to your CRM if one is integrated. See the Messaging section above for the full field breakdown.

Dashboard

Your Dashboard is your control center for the contact center. It gives you a live view of what's happening across the queues and colleagues you're assigned to, and tracks your own performance for the day. You'll find it in the left navigation bar.

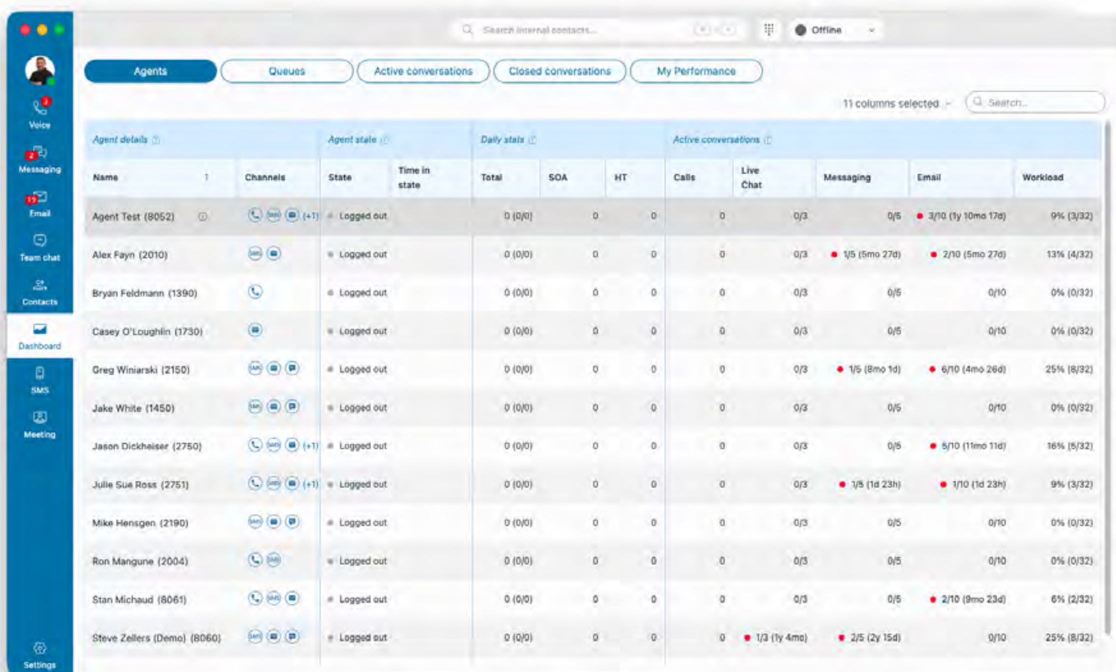
The Dashboard is organized into five tabs: Agents, Queues, Active Conversations, Closed Conversations, and My Performance.

> 💡 **Note:** As an Agent, you'll only see queues and colleagues that you're personally assigned to — not the entire contact center. If a queue or teammate you're expecting isn't showing up, check with your supervisor to confirm your assignments.

Most tabs let you customize which columns are visible using the columns-selected dropdown in the top-right, and include a Search box for filtering results.

Agents Tab

This tab shows a live snapshot of the other agents you're assigned to work alongside — handy for knowing who's available if you need to hand off a conversation or ask for help.



Agents tab

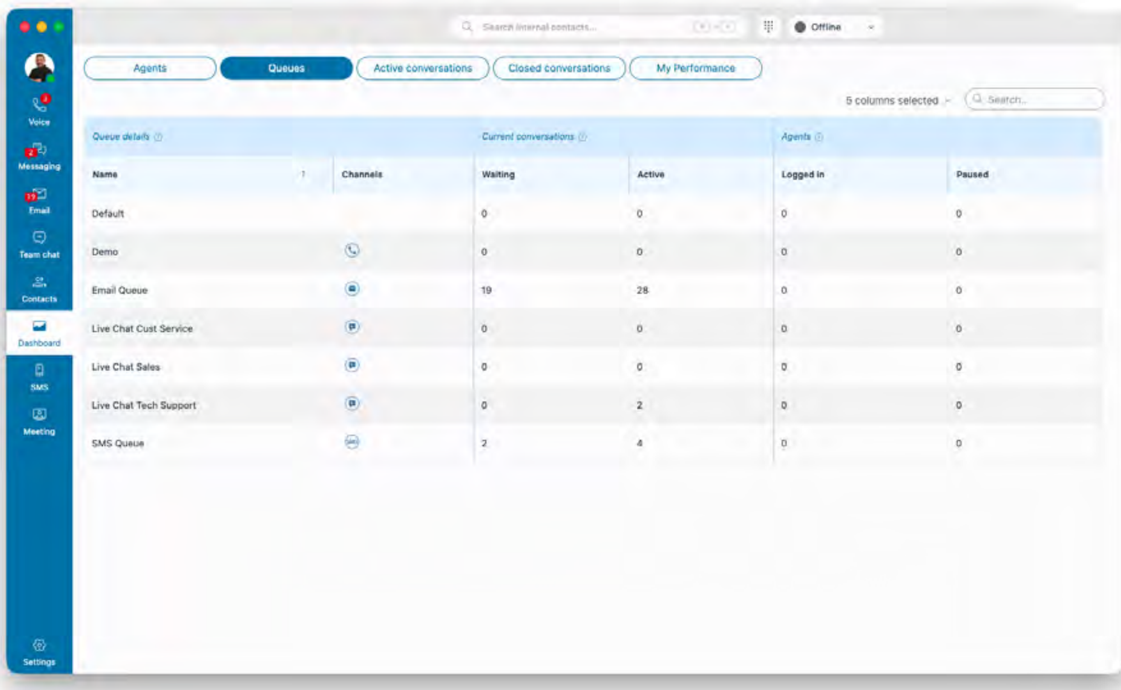
Columns are grouped into four categories:

- **Agent Details** — Name and extension number.
- **Channels** — Icons showing which channels (Voice, SMS, Email, Chat) that agent is set up to handle.
- **Agent State** — State shows whether the agent is currently logged in, logged out, or paused; Time in State shows how long they've been there.

- **Daily Stats** — Total is how many conversations that agent has handled today. SOA (Speed of Answer) is the average time it took them to respond, including any time the customer spent waiting in queue. HT (Handle Time) is the average amount of time they spend actively working a conversation once it's picked up.
- **Active Conversations** — How many conversations that agent is currently handling on each channel (Calls, Live Chat, Messaging, Email), out of their maximum allowed — for example, "4/10" means 4 out of a possible 10. A red dot with a duration next to a number flags the oldest still-open conversation on that channel, a useful signal that something's been waiting a while and might need attention.
- **Workload** — A single combined percentage showing how full that agent's plate is across every channel, relative to their total capacity.

Queues Tab

This tab shows a real-time view of the queues you're assigned to.

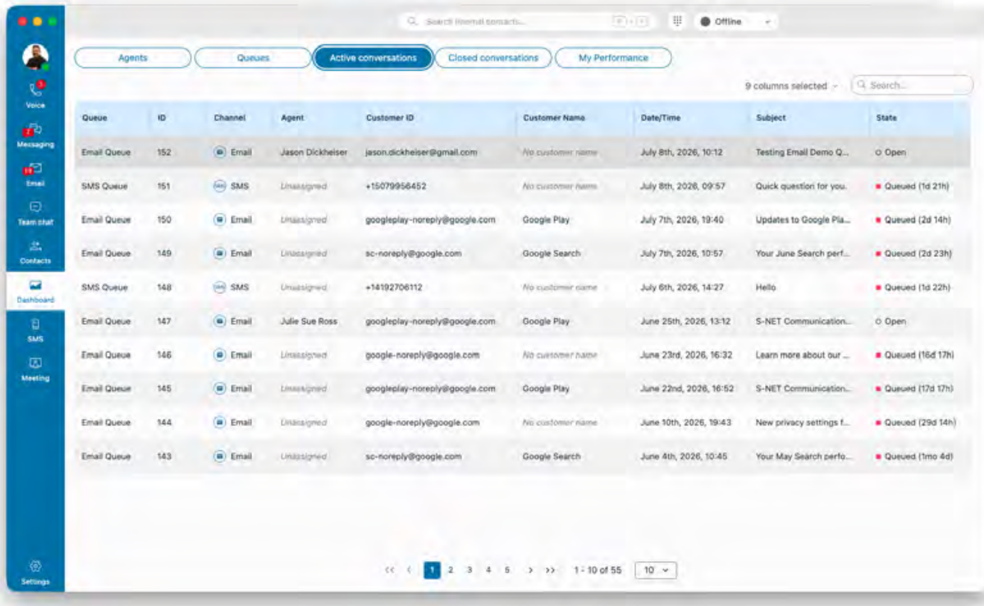


Queues tab

- **Queue Details** — The queue's name.
- **Channels** — Which channel (Voice, SMS, Email, or Chat) that queue handles.
- **Current Conversations** — Waiting is how many conversations are currently sitting in queue, not yet picked up. Active is how many are currently being handled.
- **Agents** — Logged In and Paused show how many agents assigned to that queue are currently available versus paused.

Active Conversations Tab

This tab lists every conversation currently open across your assigned queues — regardless of which agent is handling it, or whether it's been picked up yet.

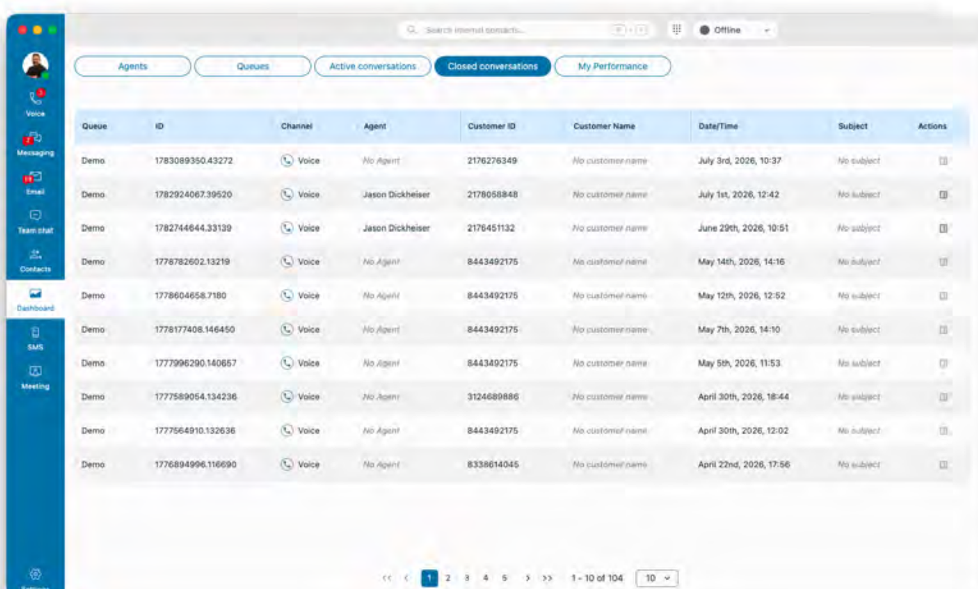


Active Conversations tab

Columns shown include the queue, a conversation ID, the channel, the assigned agent (or "Unassigned"), the customer's ID and name (when available), the date and time it came in, the subject line (for Email), and its current state — for example, "Queued" with how long it's been waiting. Results are paginated, with controls at the bottom to move between pages or change how many rows are shown per page.

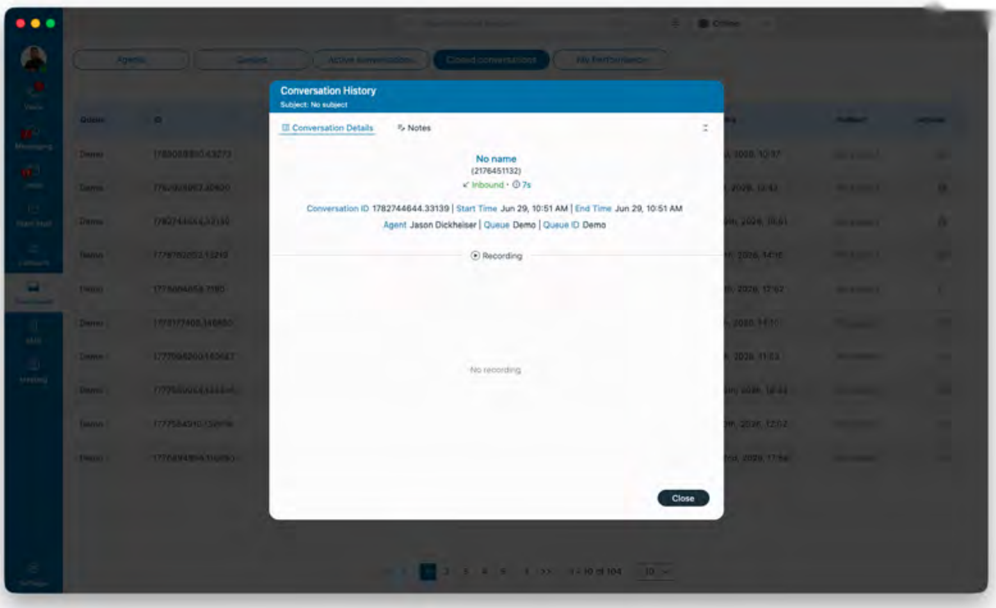
Closed Conversations Tab

This tab works the same way, but shows a history of conversations that have already been wrapped up — useful for reviewing how a past customer interaction was handled.



Closed Conversations tab

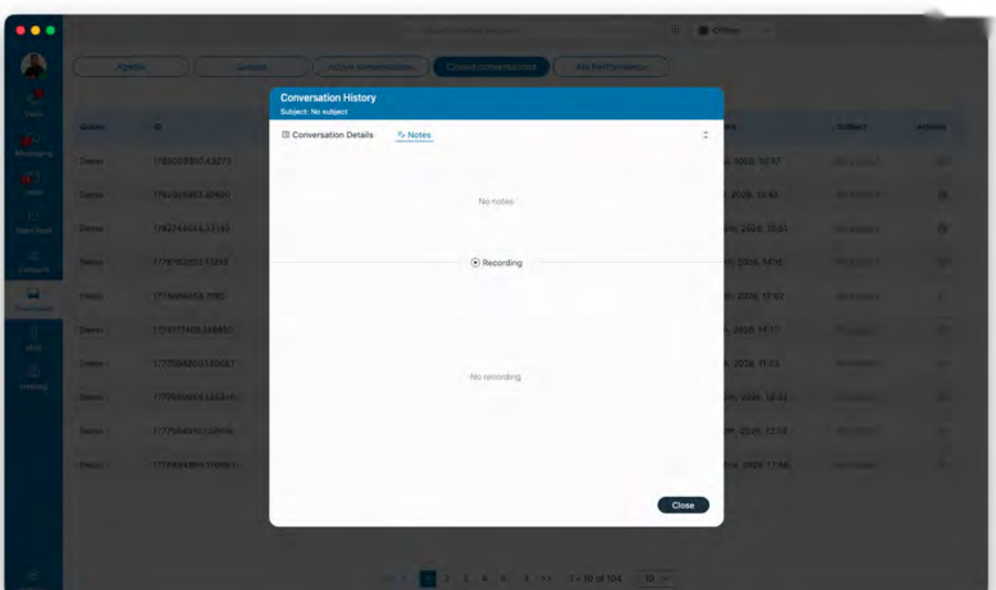
Click the icon in the Actions column to open the full Conversation History for that entry.



Conversation History modal, Conversation Details tab

The modal has two tabs:

- **Conversation Details** — Shows the caller's name and number, call direction and duration, Conversation ID, Start and End Time, the Agent who handled it, the Queue, and a recording player if one is available for that conversation.
- **Notes** — Displays any notes that were saved to this contact during the conversation, using the same Notes field found in the Messaging and Email side panels. If nothing was saved, it shows "No notes."

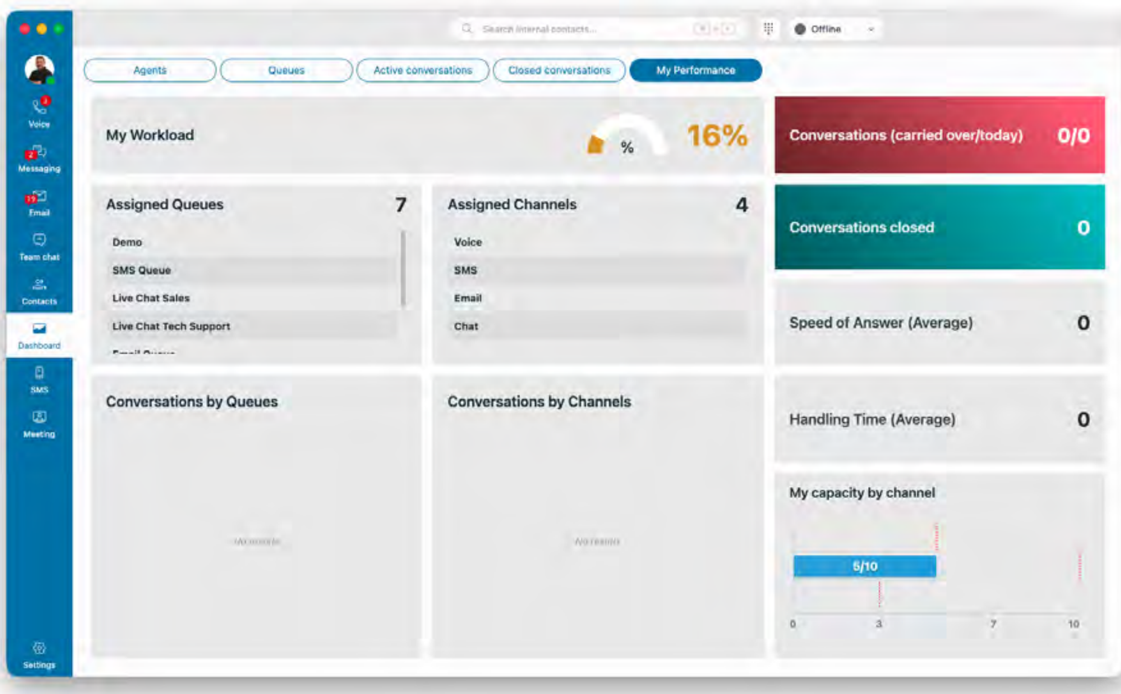


Conversation History modal, Notes tab

Click Close to exit back to the Closed Conversations list.

My Performance Tab

This is your personal at-a-glance summary for the day.



My Performance tab

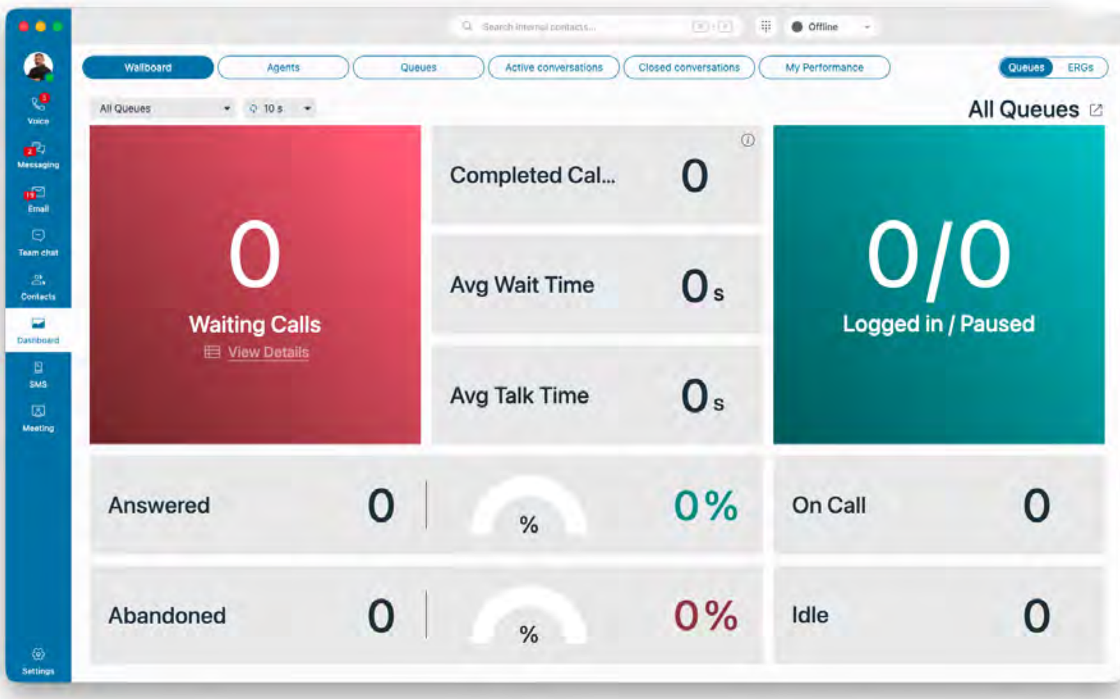
- **My Workload** — Your current combined workload percentage across all channels.
- **Conversations (Carried Over/Today)** — How many conversations rolled over from a previous day versus how many are new today.
- **Conversations Closed** — How many conversations you've completed today.
- **Speed of Answer (Average)** and **Handling Time (Average)** — Your personal averages for the day, using the same definitions as the Agents tab above.
- **Assigned Queues** and **Assigned Channels** — A running count and scrollable list of which queues and channels you're set up to handle.
- **Conversations by Queues** and **Conversations by Channels** — Breakdowns showing where your workload is coming from today.
- **My Capacity by Channel** — A bar for each channel showing how many active conversations you're currently handling against your maximum allowed, so you can see at a glance where you have room to take on more and where you're at capacity.

Dashboard (Supervisor)

The Dashboard works the same way for Supervisors as it does for Agents — with two important additions: a Wallboard tab, and the ability to toggle between Queues and ERGs so you can monitor both sides of your contact center from one place.

Wallboard Tab

The Wallboard gives you a real-time, at-a-glance view of voice queue activity — designed to be glanceable, whether you're checking in for a moment or displaying it on a screen for your team.



Wallboard, Queues view

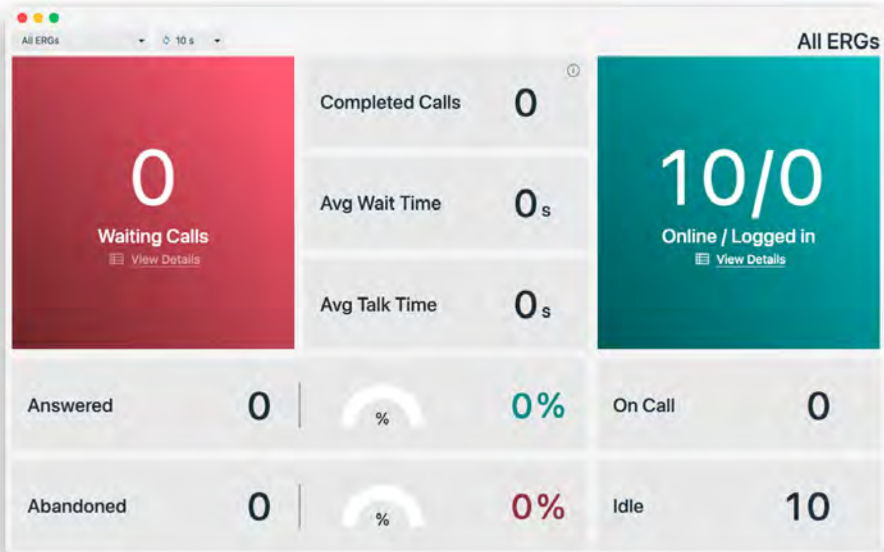
> 💡 **Note:** The Wallboard reflects Voice activity only. For a live view of chat, SMS, or email activity, use the Queues tab covered later in this section.

At the top, you can choose which queue to focus on using the All Queues dropdown (or narrow it down to a specific one), and set how often the data refreshes using the seconds dropdown next to it.

- **Waiting Calls** — How many calls are currently sitting in queue, not yet answered. Click View Details to see the individual calls behind this number.
- **Completed Calls** — The total of answered and unanswered calls today.
- **Avg Wait Time** — The average amount of time callers spend waiting in queue before being answered.
- **Avg Talk Time** — The average length of a call once it's been picked up.
- **Logged In / Paused** — How many agents assigned to this queue are currently logged in and available, versus paused.
- **Answered** — The number and percentage of calls that were successfully answered by an agent.

- **Abandoned** — The number and percentage of calls where the caller hung up before reaching an agent.
- **On Call** — How many agents are currently active on a call right now.
- **Idle** — How many agents are logged in and available, but not currently on a call.

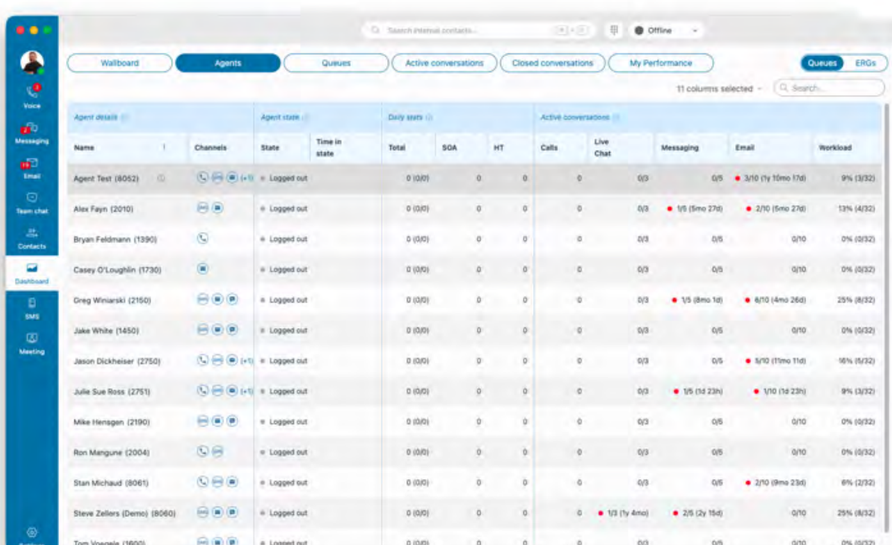
You'll also notice a small pop-out icon next to "All Queues" in the top-right corner. Clicking it opens the Wallboard in its own window, separate from the rest of the app — handy if you want to display it on a dedicated monitor or TV in your contact center.



Standalone Wallboard window

Agents Tab

This tab works the same way as the Agent view's Agents tab, showing agents tied to the queues you're assigned to, grouped into the same four categories:

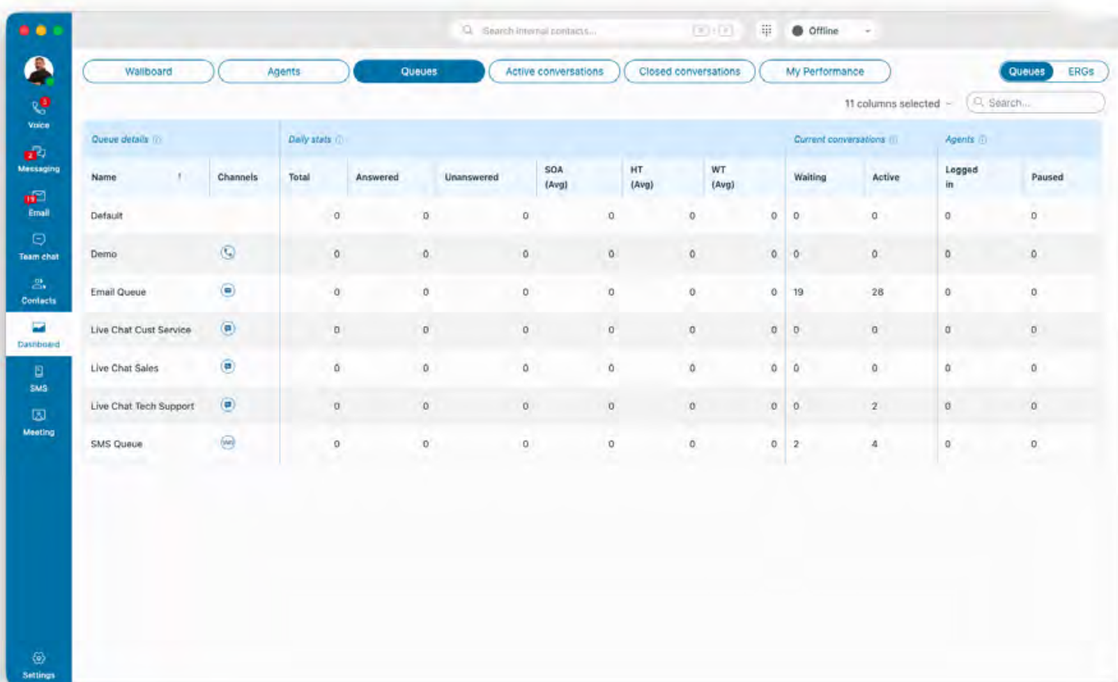


Agents tab, Supervisor view

- **Agent Details** — Name and extension number.
- **Channels** — Icons showing which channels (Voice, SMS, Email, Chat) that agent is set up to handle.
- **Agent State** — State shows whether the agent is currently logged in, logged out, or paused; Time in State shows how long they've been there.
- **Daily Stats** — Total is how many conversations that agent has handled today. SOA (Speed of Answer) is the average time it took them to respond, including any time the customer spent waiting in queue. HT (Handle Time) is the average amount of time they spend actively working a conversation once it's picked up.
- **Active Conversations** — How many conversations that agent is currently handling on each channel (Calls, Live Chat, Messaging, Email), out of their maximum allowed. A red dot with a duration next to a number flags the oldest still-open conversation on that channel.
- **Workload** — A single combined percentage showing how full that agent's plate is across every channel, relative to their total capacity.

Queues Tab

This tab gives you a real-time, cross-channel view of the queues you're assigned to — not just voice, unlike the Wallboard.



Queues tab

- **Queue Details** — The queue's name and channels handled (Voice, SMS, Email, or Chat).
- **Daily Stats** — Total, Answered, and Unanswered show how many conversations came into that queue today, and how many were answered versus left unanswered. SOA (Avg) is the average time it took a conversation to reach an agent today, from entering the queue to the agent's response — the full picture of what a customer experienced. HT (Avg) is the average Handle Time for that queue today. WT (Avg) is the average wait time before connecting to an agent — a narrower slice of SOA that isolates just the hold time.

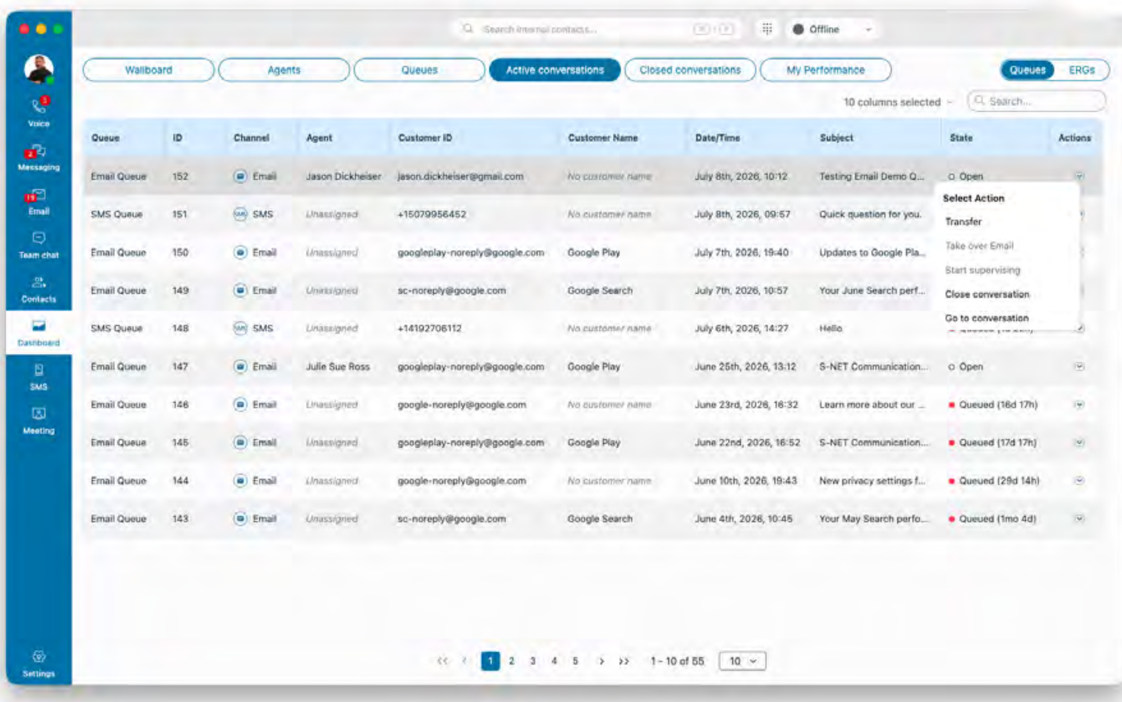
- **Current Conversations** — Waiting and Active show how many conversations are sitting in queue right now versus currently being handled.
- **Agents** — Logged In and Paused show how many agents assigned to that queue are currently available versus paused.

Active Conversations Tab

This tab lists every conversation currently open across your assigned queues — every channel, whether it's assigned to an agent or still waiting.

Columns shown include the queue, a conversation ID, the channel, the assigned agent (or "Unassigned"), the customer's ID and name (when available), the date and time it came in, the subject line (for Email), and its current state.

Click the dropdown arrow in the Actions column to take action on any conversation directly from this view:

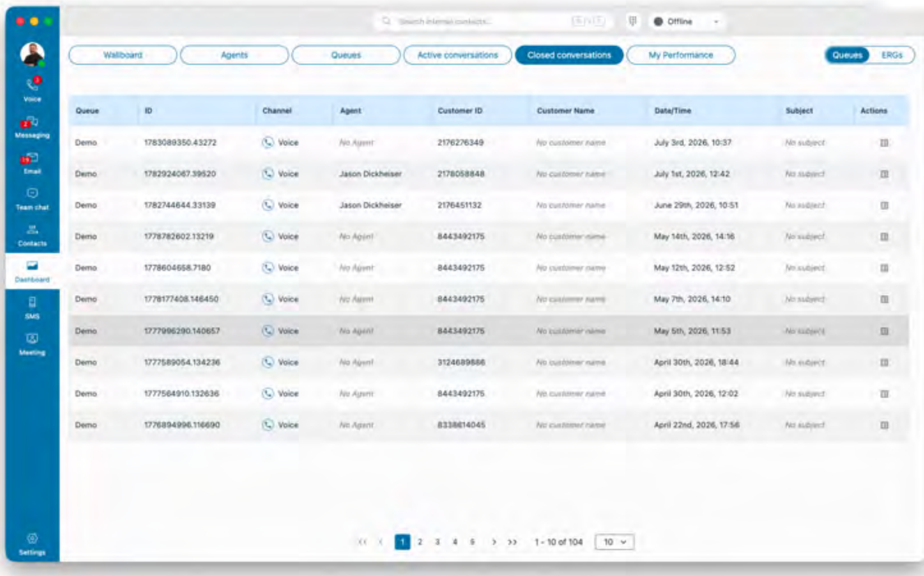


Active Conversations tab, Actions dropdown

- **Transfer** — Send the conversation to a different agent or queue, the same way it works from inside Messaging or Email.
- **Take over [Channel]** — Assign an unassigned conversation to yourself, the same way an agent would claim it. The label changes based on the conversation's channel (for example, "Take over Email").
- **Start Supervising** — Available once a conversation is actively being handled by an agent (greyed out for unassigned conversations, like the ones shown here). This lets a supervisor monitor the conversation in real time.
- **Close Conversation** — End the conversation directly from this view.
- **Go to Conversation** — Open the full conversation thread (in Messaging or Email) to see the complete message history.

Closed Conversations Tab

This tab works the same way as Active Conversations, but shows a history of conversations that have already wrapped up, across your assigned queues. Columns shown include the queue, conversation ID, channel, agent, customer ID and name, date and time, subject line, and an Actions column.

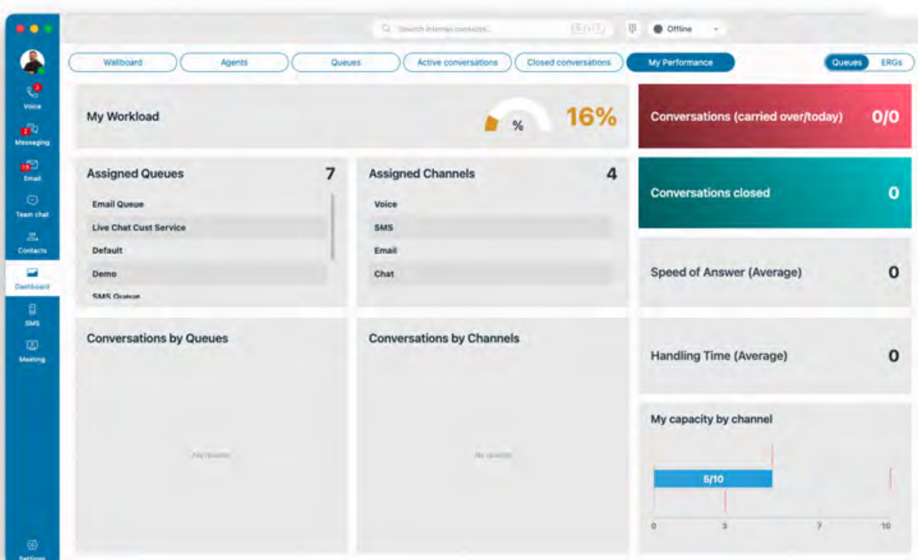


Closed Conversations tab

Click the icon in the Actions column to open the full Conversation History, the same as in the Agent view.

My Performance Tab

This tab works exactly the same as the Agent view — your own personal daily summary, regardless of account type.



My Performance tab

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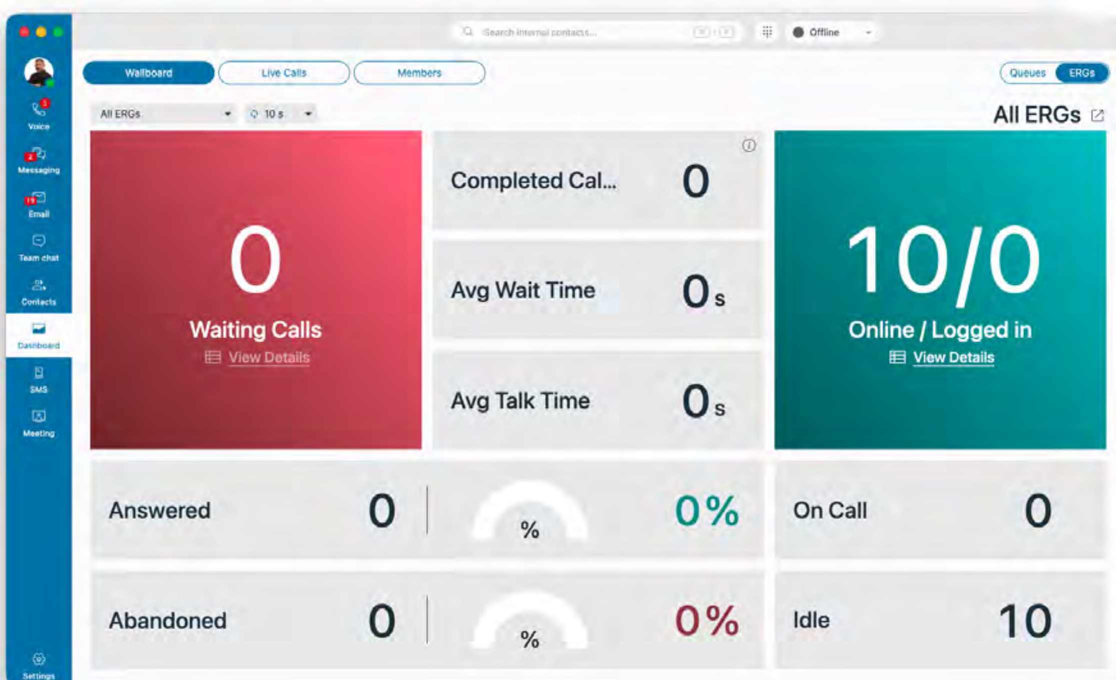
- **My Capacity by Channel** — A bar for each channel showing how many active conversations you're currently handling against your maximum allowed.

Switching to ERGs

In the top-right corner, next to the queue/ERG toggle, click ERGs to shift the Dashboard's focus from Voice Queues over to Enhanced Ring Groups.



Wallboard, ERGs view

💡 **Note:** ERGs can run just fine without any Dashboard visibility at all — they're a lighter-weight calling feature that doesn't require an Agent or Supervisor license to function. This Dashboard view is available if your organization has a Supervisor license, giving you the option to monitor ERG activity the same way you'd monitor Voice Queues.

Switching to ERGs changes the available tabs. Instead of Agents, Queues, Active Conversations, Closed Conversations, and My Performance, you'll now see just three: Wallboard, Live Calls, and Members —

reflecting that ERGs are a simpler, voice-only calling feature, without the omnichannel conversation tracking that Voice Queues have.

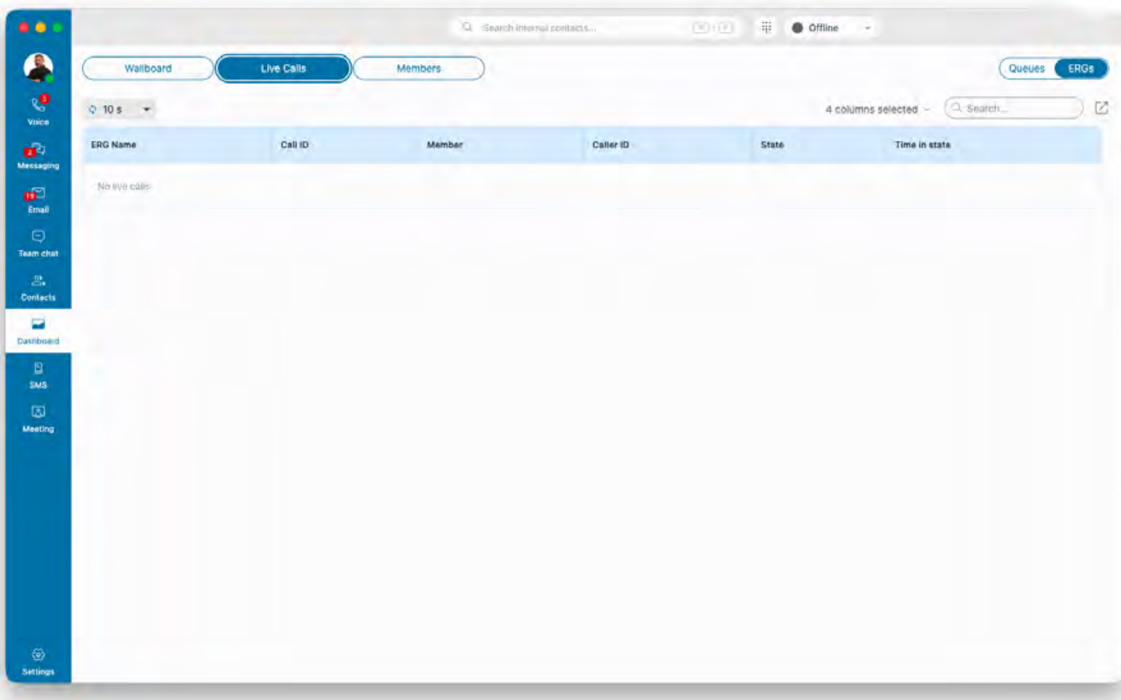
The Wallboard tab for ERGs works almost identically to the one for Queues, with one label difference:

- **Online / Logged In** — Unlike Voice Queues (which show Logged In / Paused), ERG members don't have a pause state — they're either online and available, or they're not. This card shows how many members are currently online, out of how many are logged in overall.

Everything else — Waiting Calls, Completed Calls, Avg Wait Time, Avg Talk Time, Answered, Abandoned, On Call, and Idle — works the same way described earlier for the Queues Wallboard.

Live Calls Tab

This tab lists every call currently in progress across your ERGs.



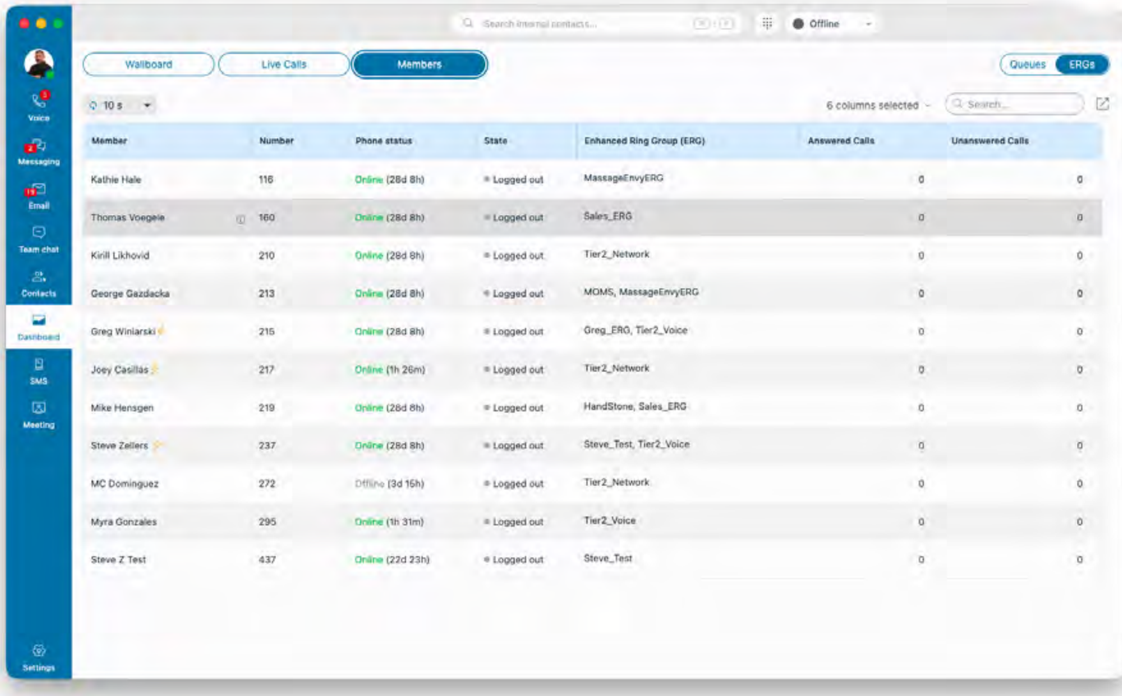
Live Calls tab

- **ERG Name** — Which Enhanced Ring Group the call is coming through.
- **Call ID** — A unique identifier for the call.
- **Member** — Which ERG member is on the call (or ringing).
- **Caller ID** — The number or name of the person calling in.
- **State** — The call's current status (for example, ringing or connected).
- **Time in State** — How long the call has been in its current state.

When there's nothing happening, this tab simply shows "No live calls."

Members Tab

This tab lists everyone assigned to your ERGs, along with their current phone status and daily call stats.

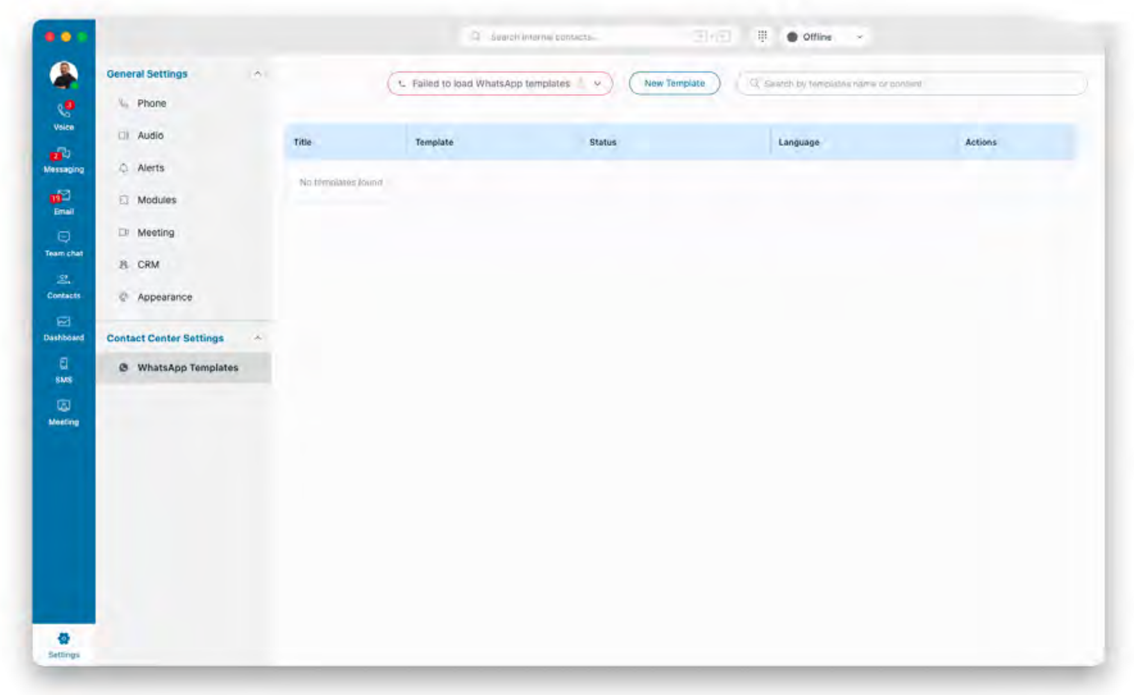


Members tab

- **Member** — The person’s name.
- **Number** — Their extension number.
- **Phone Status** — Whether their phone itself is online, and how long it’s been in that state. This reflects their device connection, separate from ERG participation.
- **State** — Whether this member is currently logged in to receive ERG calls. Depending on how your organization has this ERG configured, members may need to actively log in and out, or they may be automatically logged in as soon as they’re added. This is separate from Phone Status — a member’s phone can be Online while their ERG state shows Logged Out.
- **Enhanced Ring Group (ERG)** — Which ERG(s) this member belongs to. A member can belong to more than one.
- **Answered Calls / Unanswered Calls** — Daily totals for calls this member answered versus missed.

WhatsApp Templates

If your organization uses WhatsApp as a customer channel, you'll find **WhatsApp Templates** under **Settings**, in the bottom-left corner of the navigation pane, under **Contact Center Settings**.



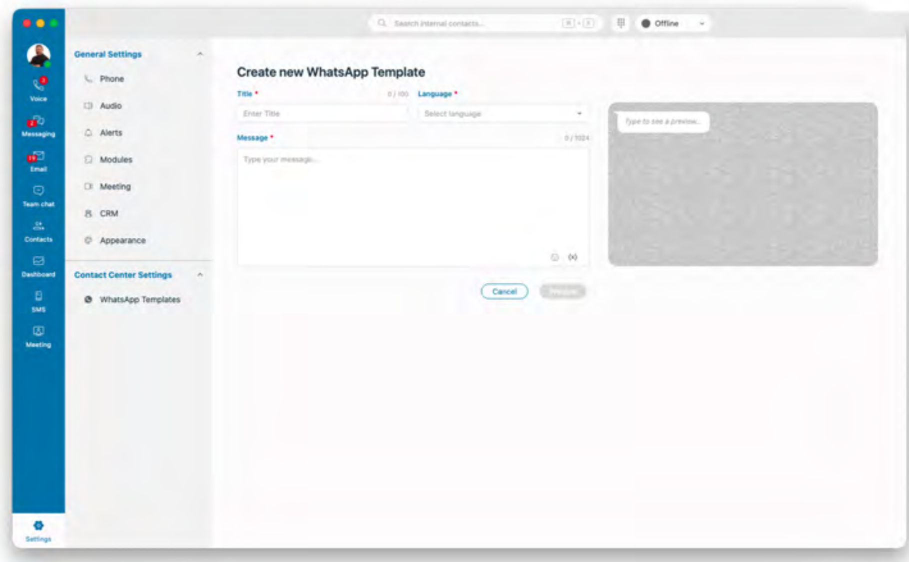
WhatsApp Templates, not configured

WhatsApp requires businesses to use pre-approved message templates for certain types of outbound messages, rather than sending free-form text. This screen is where those templates are created and managed.

> 💡 **Note:** If you see a "Failed to load WhatsApp templates" message at the top of this screen, or WhatsApp doesn't appear as an option at all, your organization likely doesn't have WhatsApp set up as a channel yet. If you'd like to add WhatsApp as a channel, reach out to your COEO Account Manager or Client Technology Advisor (CTA).

Creating a New Template

Click New Template to open the template builder.



Create new WhatsApp Template form

- **Title** — An internal name for the template, used to identify it in your list (up to 100 characters).
- **Language** — The language this template will be submitted and approved in.
- **Message** — The template's text content (up to 1024 characters). You can add emojis using the icon in the bottom corner of the box, and insert variable placeholders using the {x} icon, for details that change per customer (like a name or order number).
- **Preview** — A live preview of how the message will appear in WhatsApp, shown on the right as you type.

As you build your message, keep an eye out for validation warnings — for example, a template starting or ending with a placeholder isn't best practice, and too many placeholders relative to the message length will require you to either reduce them or lengthen the message. These guardrails exist because WhatsApp reviews and approves templates before they can be used, and templates that don't follow best practices are more likely to be rejected.

Click Preview to review the template, or Cancel to discard it.