

BOLD360 AGENT CHECKLIST

Welcome to Bold360!

Use this checklist to guide your Bold360 Live Agent training. By completing each lesson below, you will be equipped with the tools you need to be set up for success and become a Bold360 power user.

Agent Checklist

Please visit [Embark Training](#) and [Bold360 Agent Training](#) to access the lessons below.

Lesson #1 - Familiarize yourself with the Bold360 Agent Interface

- Brief overview of Agent interface

Lesson #2 – Console Overview

- Omni-channel work queue
- Active work items
- Slash commands / shortcuts
- Canned messages
- Contextual Information
- Omni-channel history

Lesson #3 – Agent Chat Operation

- Lifecycle of a chat
 - Accept a chat
 - Canned messages for chat
 - Transfer a chat
 - Prepare a wrap-up / end chat
- Chat transcripts

Lesson #4 – Agent Best Practice Guide

- Helpful tips and best practice guidelines
- Helpful FAQs

Optional Lessons for Agents

1. Email Management
2. SMS/Facebook Management