












Agent Diary

Agent Diary
X

Select call(s) to perform an action Page Size

	State	Due	Account	Campaign	List	Customer	Customer Name
<input checked="" type="checkbox"/>		2017-05-24 13:36	Brigitte	BR Inbound Outbound	Named tel Two	TRN_9	Mrs Sarah Wale
<input type="checkbox"/>		2017-05-26 13:45	Brigitte	BR Inbound Outbound	Named tel Two	BRIBOB_43	Ms Ruth Red
<input type="checkbox"/>		2017-05-26 13:45	Brigitte	BR Inbound Outbound	Named tel Two	TRN_3	Dr Tom Gage
<input type="checkbox"/>		2017-05-25 14:06	Brigitte	BR Inbound Outbound	Named tel Two	BRIBOB_44	mr Ted Tubby

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THE AGENT DIARY

Introduction

The *Agent Diary* enables contact centre agents to view priority, sleeping and scheduled calls assigned to them, with the option to manipulate these calls.

The Agent Diary displays a list of all calls that are assigned to the agent currently logged into the workstation and enables the agent to view associated details, including:

- State of the call
- Date the call is due
- Account, Campaign and Outbound list name,
- Customer prefix and Customer Name
- Customer details and history events associated with the selected call

In addition agents are able to:

- Reschedule calls to a later date and time
- Reassign calls to another agent




*At client's request, we can also enable a **Remove** option in the Agent Diary. Be aware however that this will allow agents to delete any calls that they select in the Agent Diary from the associated outbound call lists.*

Should you wish to use this option, please contact a Noetica representative and we will add the Remove icon to the Agent Diary toolbar.

THE AGENT DIARY SCREEN

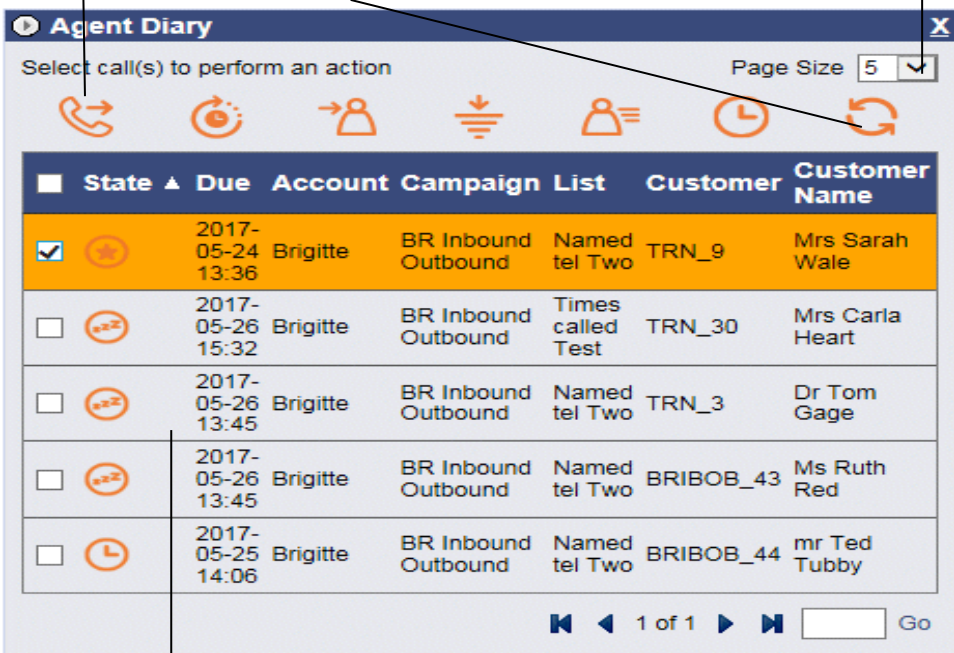
If the Agent Diary is not already displayed in the Synthesys Portal you can add the option, providing that you have the relevant access permission.

- Go to the **Settings**  icon at the top right of the Synthesys Portal screen.
- Select **Catalog**, and then tick the check box next to the **Agent Diary** option.
- Click the **Add** button, to add the Agent Diary to your Portal page.

Toolbar with icons and tool tips to allow manipulation of calls

Refresh button to update list

Number of items displayed on page



The screenshot shows the 'Agent Diary' interface. At the top, there is a toolbar with several icons: a telephone, a refresh button, a person with an arrow, a person with a lightning bolt, a person with a list, a clock, and a refresh button. Below the toolbar is a table with columns: State, Due, Account, Campaign, List, Customer, and Customer Name. The first row is highlighted in orange and has a checkmark in the State column. Below the table is a pagination bar showing '1 of 1' and a 'Go' button.

State	Due	Account	Campaign	List	Customer	Customer Name
<input checked="" type="checkbox"/>	2017-05-24 13:36	Brigitte	BR Inbound Outbound	Named tel Two	TRN_9	Mrs Sarah Wale
<input type="checkbox"/>	2017-05-26 15:32	Brigitte	BR Inbound Outbound	Times called Test	TRN_30	Mrs Carla Heart
<input type="checkbox"/>	2017-05-26 13:45	Brigitte	BR Inbound Outbound	Named tel Two	TRN_3	Dr Tom Gage
<input type="checkbox"/>	2017-05-26 13:45	Brigitte	BR Inbound Outbound	Named tel Two	BRIBOB_43	Ms Ruth Red
<input type="checkbox"/>	2017-05-25 14:06	Brigitte	BR Inbound Outbound	Named tel Two	BRIBOB_44	mr Ted Tubby




List of priority, sleeping & scheduled calls assigned to agent logged on

Option	Description
State	Icons and tooltips of priority, sleeping and scheduled calls assigned to the agent currently logged into the Synthesys Portal.
Due	Date the call is due to be presented to the agent.
Account	Name of the account associated with the call displayed
Campaign	Name of the campaign associated with the call displayed.
List	Name of the outbound list associated with the call displayed.
Customer	CRM prefix for the call displayed.
Customer Name	Name of customer for the call displayed

Please see the next pages for a description of the Agent Diary toolbar and options available.

CALL STATES








The **State** column shows icons and tooltips of priority, sleeping and scheduled calls that have been assigned to the agent currently logged into the Synthesys Portal.

Icon	Description
	Priority. Priority calls (also referred to as <i>Emergency</i> calls), take the highest priority and will be presented to the agent first, before due scheduled or sleeping calls.
	Scheduled. Shows calls that have been scheduled to be taken at a particular date and time.
	Sleeping. Refers to calls waiting to be presented to the agents at a predefined time.

AGENT DIARY TOOLBAR


The Agent Diary has one main toolbar:

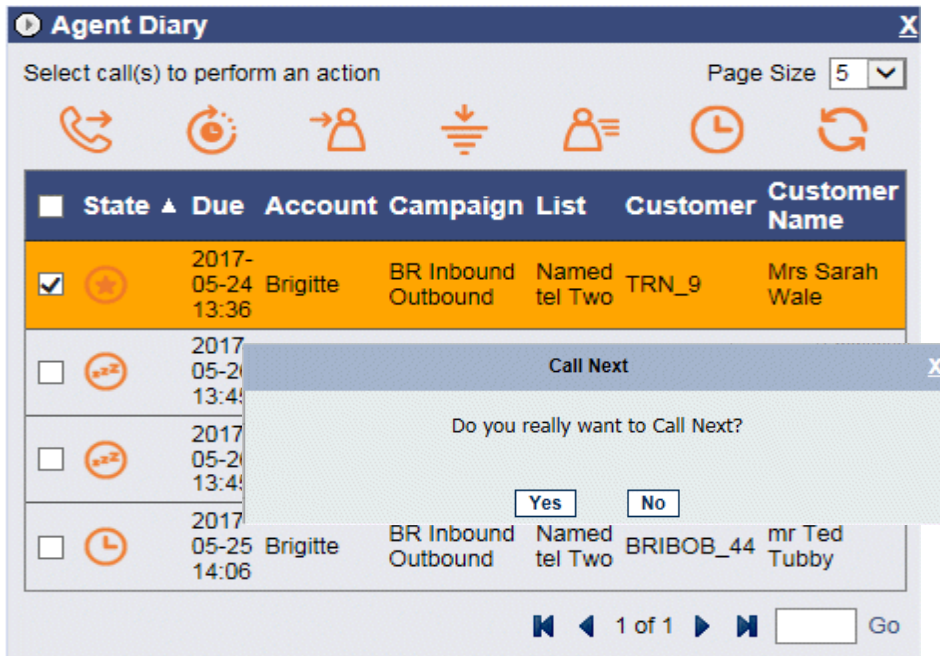


Icon	Description
	Call Next. Pick up the selected call immediately (as soon as possible).
	Reschedule. Schedule the selected call to be taken at a later date/ time.
	Reassign. Assign the call to another agent.
	Filter. Set a filter to display selected calls only.
	Details. Display customer details associated with the selected call.
	History. Display the history events associated with the selected call.
	Refresh. Update the list of priority, scheduled and sleeping calls.

Call Next

To pick up and handle a priority, scheduled or sleeping call immediately:

- Select the record that you wish to call.
- Click the **Call Next**  icon.



The screenshot shows the 'Agent Diary' window with a table of call records. The first record is selected (checkbox checked) and has a 'Call Next' icon (a telephone handset with a right-pointing arrow) next to it. A dialog box titled 'Call Next' is overlaid on the table, asking 'Do you really want to Call Next?' with 'Yes' and 'No' buttons.

State	Due	Account	Campaign	List	Customer	Customer Name
<input checked="" type="checkbox"/>	2017-05-24 13:36	Brigitte	BR Inbound Outbound	Named tel Two	TRN_9	Mrs Sarah Wale
<input type="checkbox"/>	2017-05-24 13:41					
<input type="checkbox"/>	2017-05-24 13:41					
<input type="checkbox"/>	2017-05-25 14:06	Brigitte	BR Inbound Outbound	Named tel Two	BRIBOB_44	mr Ted Tubby

- Click **Yes** to open the selected call on your screen, ready for you to handle.
- Click **No** to cancel the action.




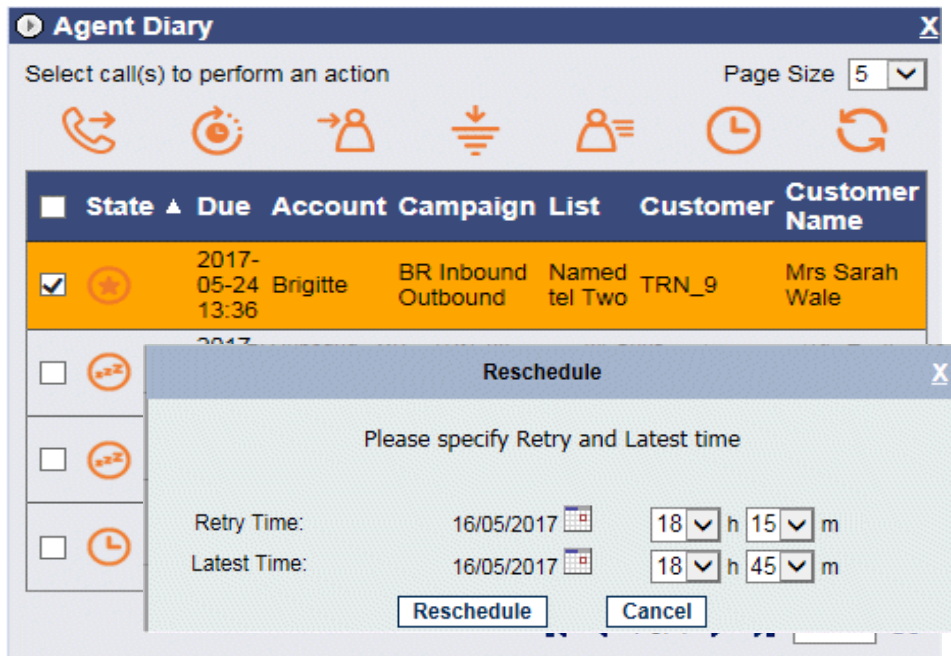
As, in the Agent Diary, agents are able to select and call records from outbound lists that are not currently assigned to their team, supervisors must ensure that the webflows associated with the outbound lists are part of the users' team, to allow for a record to pop to the agent screen.

In the Outbound Manager (Outbound List Advanced Options dialog), you can set a MaximumNextCallLateness, to specify in minutes the maximum lateness by which calls requested via the Call Diary (Call Next) should be presented to the agent, before they will be recycled as missed latest time.

Reschedule

To schedule selected calls to be taken at a later date and time:

- Select the record(s) that you wish to reschedule.
- Click the **Reschedule**  icon.



In the Reschedule dialog subsequently displayed:

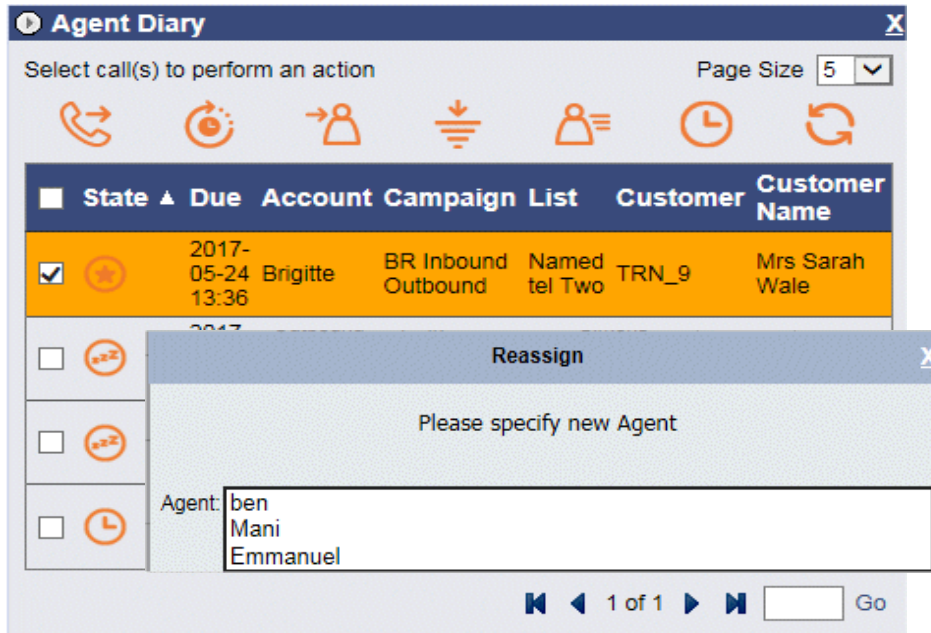
- Select the date and time to reschedule the call.
- Select the latest date and time during which the call should be taken.
- Click *Apply* to display the changes.
- Click *Cancel*, to abandon the action.

The outbound call list will be updated automatically, displaying the new date and time for the callback.

Reassign

To reassign priority, scheduled and sleeping calls to another agent:


- Select the record(s) that you wish to reassign.
- Click the **Reassign**  icon.



The screenshot shows the 'Agent Diary' window with a table of call records. One record is selected (checked). A 'Reassign' dialog box is open over the table, prompting the user to 'Please specify new Agent'. The dialog box contains a text input field with the text 'ben' and a dropdown list showing 'Mani' and 'Emmanuel'. The background table has the following data:

State	Due	Account	Campaign	List	Customer	Customer Name
<input checked="" type="checkbox"/>	2017-05-24 13:36	Brigitte	BR Inbound	Named tel Two	TRN_9	Mrs Sarah Wale
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

By default, the *Agent* drop down list in the **Reassign** dialog only shows the names of agents that are able to work the outbound list to which the selected record belongs.

- Select the **Name** of the agent to whom you wish to assign the call.
- Click **Apply** to confirm, or **Cancel** if you do not wish to reassign the call.
- Click the **Refresh**  icon to display the changes.

The outbound call list will be updated automatically, displaying the *Agent ID* and the *Agent Name* of the agent that you have selected.




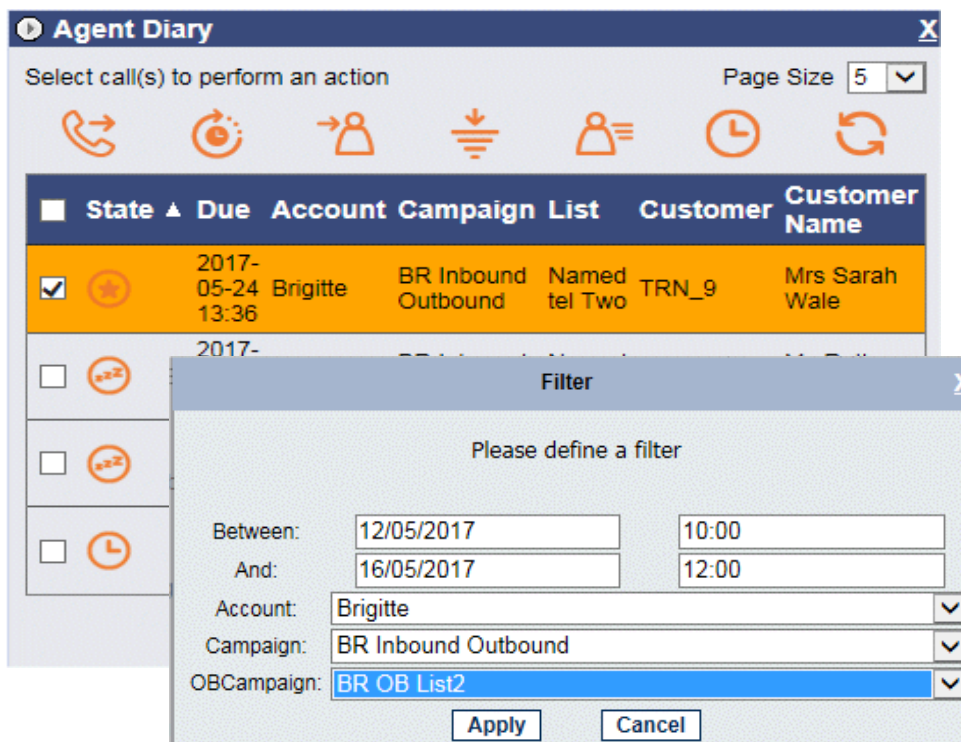
By default, a call can only be reassigned to agents that are members of a team that also contains the outbound list associated with the selected record.

To allow the re-assignment of calls to any agent, regardless of team membership, please contact a Noetica representative with a request to enable this functionality.

Filter

If you wish to view selected calls only, use the **Filter** option to specify the date and time, account, campaign and outbound list for the records to be displayed.

- Click the **Filter**  icon, to open the Filter dialog.
- Enter the **date** and **time** for your filter into the *Between:* and *And: fields*.
- Select the name of the **Account, Campaign and OBCampaign (List)** from the respective drop down menus, to display the associated assigned calls.



The screenshot shows the 'Agent Diary' window with a table of call records. A 'Filter' dialog box is open over the table, allowing users to define search criteria.

State	Due	Account	Campaign	List	Customer	Customer Name
<input checked="" type="checkbox"/>	2017-05-24 13:36	Brigitte	BR Inbound Outbound	Named tel Two	TRN_9	Mrs Sarah Wale
<input type="checkbox"/>	2017-					
<input type="checkbox"/>						
<input type="checkbox"/>						

Filter Dialog:

Please define a filter

Between: 12/05/2017 10:00
 And: 16/05/2017 12:00


Account: Brigitte
 Campaign: BR Inbound Outbound
 OBCampaign: BR OB List2

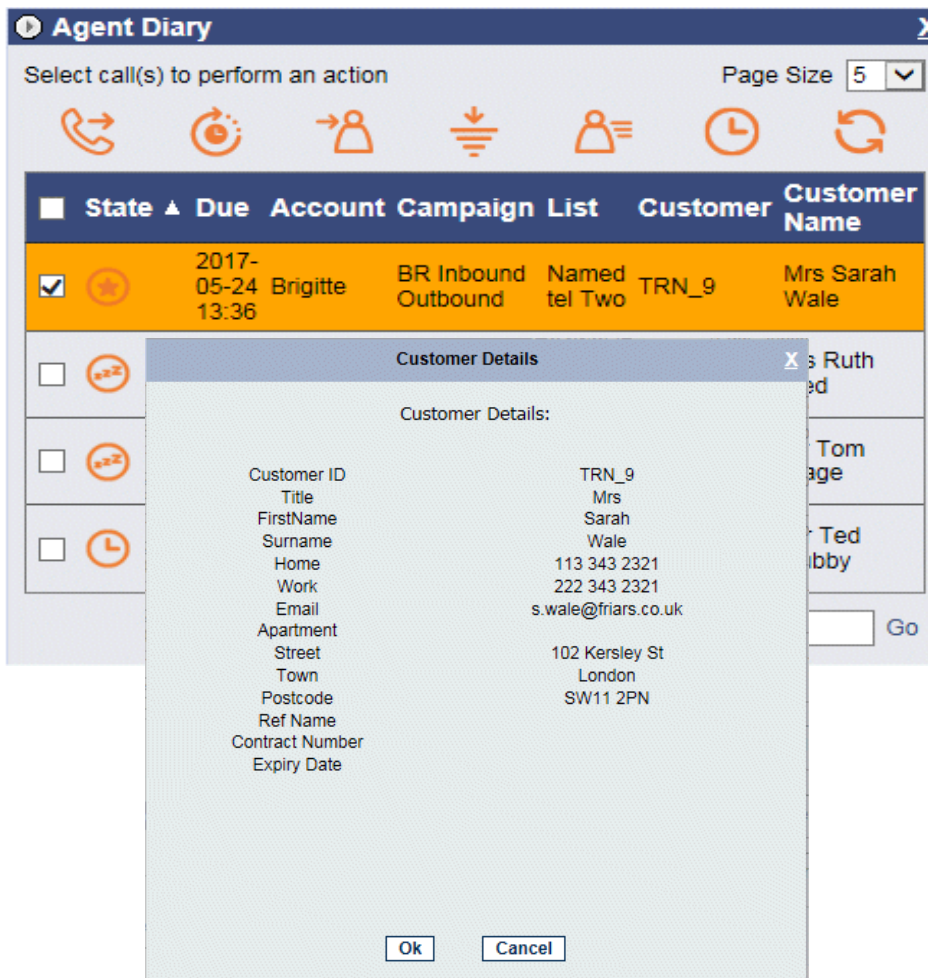
Buttons: Apply, Cancel

- Click *Apply* to display the filtered calls only.
- Click *Cancel* to close the Filter dialog without saving the changes.

Details

To view customer details for a selected call:

- Select the record that you wish to view.
- Click the **Details**  icon.



The screenshot shows the 'Agent Diary' window with a table of call records. The first record is selected, and a 'Customer Details' dialog box is open over it. The dialog box displays the following information:


Customer Details:	
Customer ID	TRN_9
Title	Mrs
FirstName	Sarah
Surname	Wale
Home	113 343 2321
Work	222 343 2321
Email	s.wale@friars.co.uk
Apartment	
Street	102 Kersley St
Town	London
Postcode	SW11 2PN
Ref Name	
Contract Number	
Expiry Date	

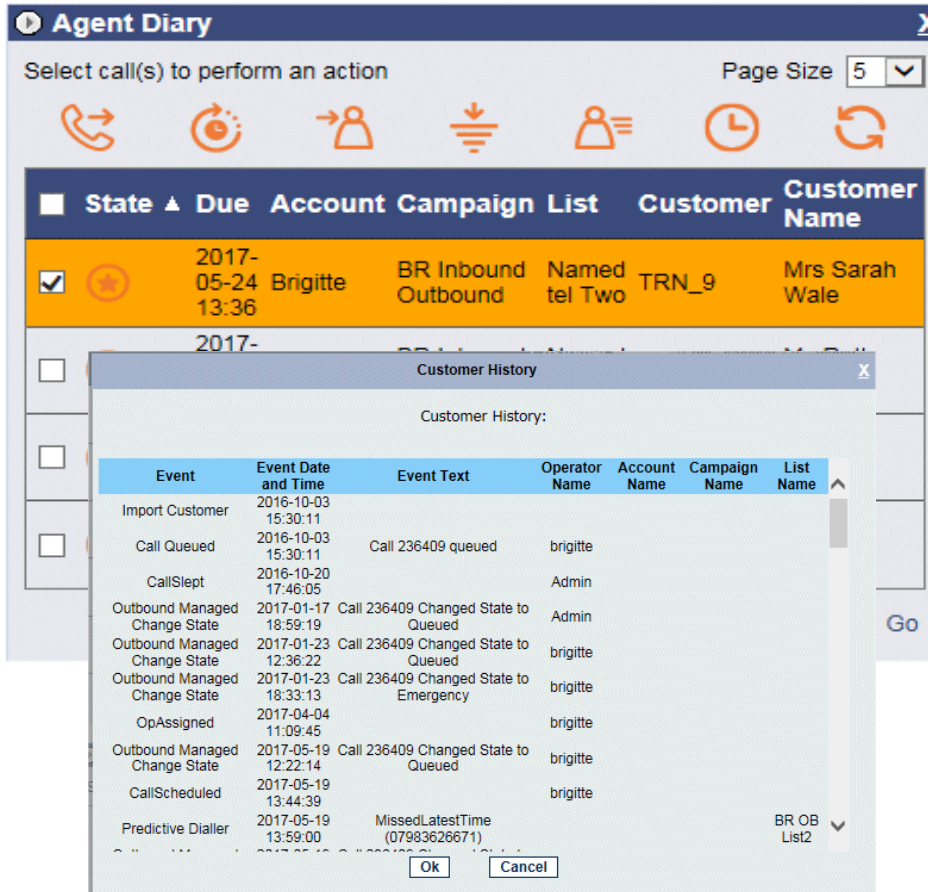
The dialog box also has 'Ok' and 'Cancel' buttons at the bottom.

In the **View Details** dialog now displayed you can view the customer details associated with the selected call.

History

To view history events for a selected call:

- Select the relevant record.
- Click the **History**  icon.



The screenshot shows the 'Agent Diary' application window. At the top, there is a header with the title 'Agent Diary' and a close button. Below the header, there is a toolbar with several icons, including a clock icon representing the 'History' function. A table of call records is displayed, with one record selected and highlighted in orange. The selected record is for a call on 2017-05-24 at 13:36, with account name 'Brigitte', campaign 'BR Inbound Outbound', list 'Named tel Two', and customer 'Mrs Sarah Wale'. A 'Customer History' dialog box is open over the table, displaying a list of events for the selected call. The dialog has a table with columns: Event, Event Date and Time, Event Text, Operator Name, Account Name, Campaign Name, and List Name. The events listed include 'Import Customer', 'Call Queued', 'CallSlept', 'Outbound Managed Change State', 'OpAssigned', 'CallScheduled', and 'Predictive Dialler'. The dialog also has 'Ok' and 'Cancel' buttons at the bottom.

Event	Event Date and Time	Event Text	Operator Name	Account Name	Campaign Name	List Name
Import Customer	2016-10-03 15:30:11					
Call Queued	2016-10-03 15:30:11	Call 236409 queued	brigitte			
CallSlept	2016-10-20 17:46:05		Admin			
Outbound Managed Change State	2017-01-17 18:59:19	Call 236409 Changed State to Queued	Admin			
Outbound Managed Change State	2017-01-23 12:36:22	Call 236409 Changed State to Queued	brigitte			
Outbound Managed Change State	2017-01-23 18:33:13	Call 236409 Changed State to Emergency	brigitte			
OpAssigned	2017-04-04 11:09:45		brigitte			
Outbound Managed Change State	2017-05-19 12:22:14	Call 236409 Changed State to Queued	brigitte			
CallScheduled	2017-05-19 13:44:39		brigitte			
Predictive Dialler	2017-05-19 13:59:00	MissedLatestTime (07983626671)				BR OB List2

In the **History for the customer** dialog now displayed you can view history events associated with the selected call.