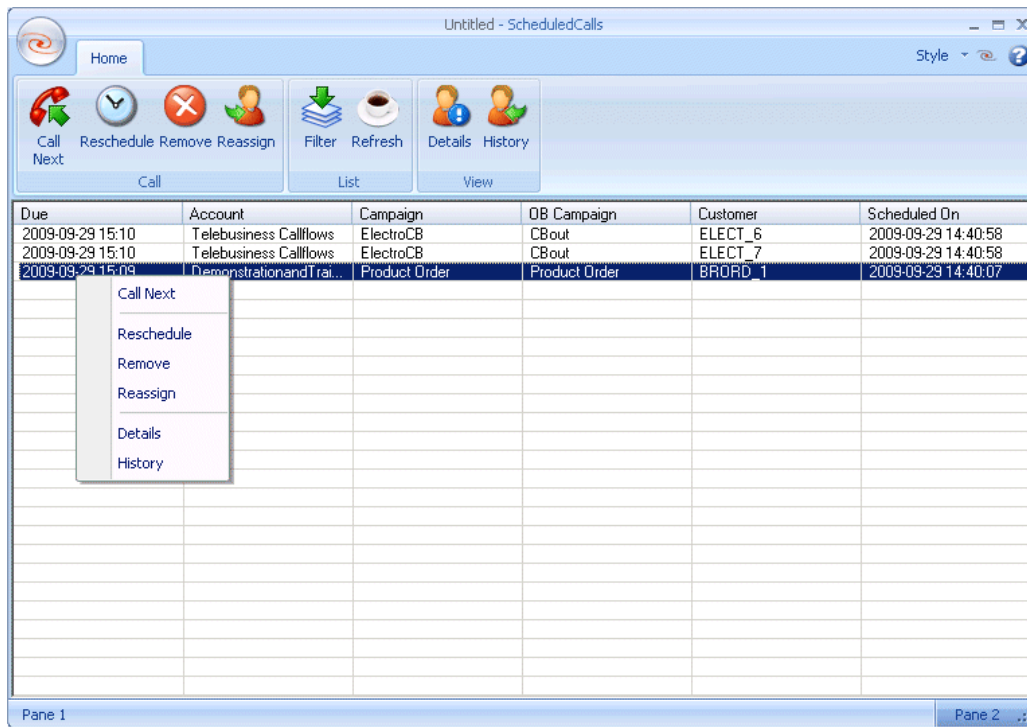


AGENT VIEW

Call Diary



Due	Account	Campaign	DB Campaign	Customer	Scheduled On
2009-09-29 15:10	Telebusiness Callflows	ElectroCB	CBout	ELECT_6	2009-09-29 14:40:58
2009-09-29 15:10	Telebusiness Callflows	ElectroCB	CBout	ELECT_7	2009-09-29 14:40:58
2009-09-29 15:09	DemonstrationandTrai...	Product Order	Product Order	BRDRD_1	2009-09-29 14:40:07

THE CALL DIARY

Introduction.....	3
Starting the Call Diary.....	4
Call Diary Toolbars	5
Call Next.....	6
Reschedule	7
Remove.....	8
Reassign	9
Filter	10
Details	11
History	12

Introduction

This feature is aimed at providing Synthesys users with the ability to view future scheduled calls (including related CRM information) and the option to manipulate these calls. This functionality is sometimes required in outbound calling operations.

The Call Diary displays a list of all calls that are scheduled to the agent currently logged into the workstation and the agent can view details of the rescheduled calls, including:

The Date the call is due

Account, Campaign and Outbound list name,

Customer prefix

Date the call was scheduled.

Additional permissions can be assigned to allow agents to:

Reschedule calls to a later date and time


Remove calls from the outbound call list

Reassign calls to another agent

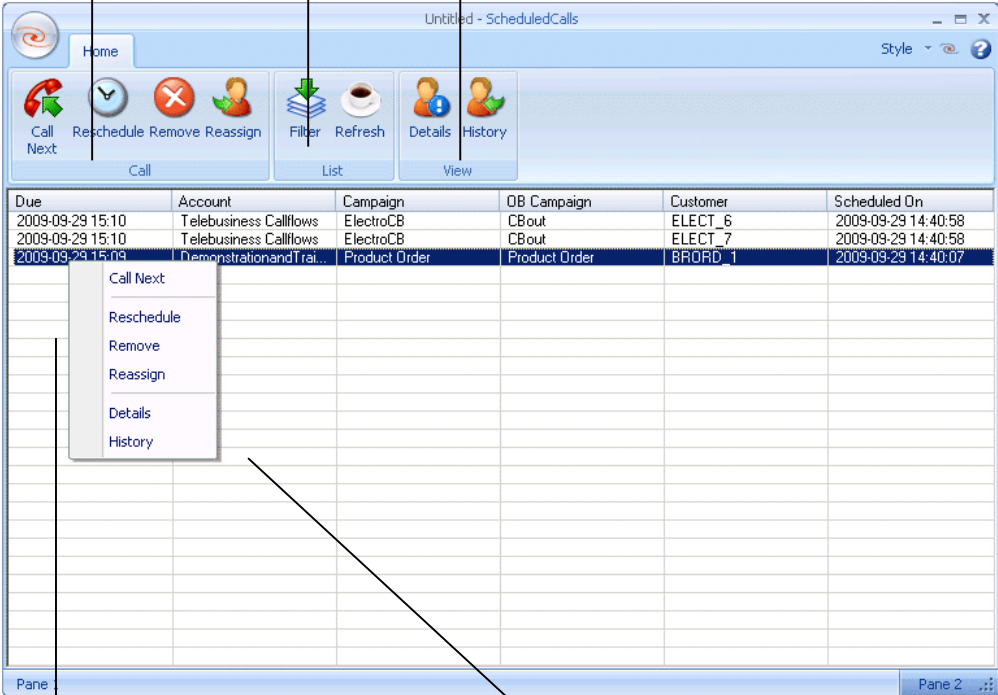
View customer details and history events associated with the selected call

Starting the Call Diary

To start the Call Diary:

- In the *Agent Start Work* screen, select the **Call Diary**  icon from the **Telephony** toolbar to open the Call Diary.

Call Toolbar List Toolbar View Toolbar



The screenshot shows the 'Untitled - ScheduledCalls' window. At the top, there are three toolbars: 'Call Toolbar' with icons for 'Call Next', 'Reschedule', 'Remove', and 'Reassign'; 'List Toolbar' with 'Filter' and 'Refresh'; and 'View Toolbar' with 'Details' and 'History'. Below the toolbars is a table of scheduled calls. The first row is highlighted in blue, indicating it is the selected call. A context menu is open over this row, listing the same actions as the toolbars: 'Call Next', 'Reschedule', 'Remove', 'Reassign', 'Details', and 'History'. Labels with arrows point to the 'Call Next' icon in the toolbar and the context menu, and to the first row of the table.

Due	Account	Campaign	QB Campaign	Customer	Scheduled On
2009-09-29 15:10	Telebusiness Callflows	ElectroCB	CBout	ELECT_6	2009-09-29 14:40:58
2009-09-29 15:10	Telebusiness Callflows	ElectroCB	CBout	ELECT_7	2009-09-29 14:40:58
2009-09-29 15:09	Demonstrationand Trai...	Product Order	Product Order	BRORD_1	2009-09-29 14:40:07

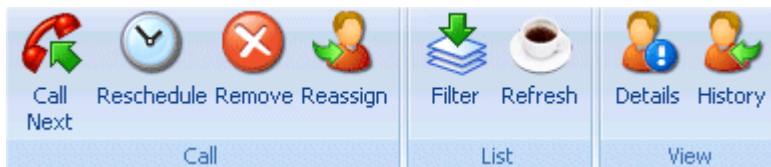
Rescheduled calls due for agent Option menu for manipulating rescheduled calls

Please see next pages for a description of the Call Diary toolbar and the options available for manipulating rescheduled calls.

Call Diary Toolbars

The Call Diary has three main toolbars:

- Call Toolbar
- List Toolbar
- View Toolbar



Icon	Description
	Call Next. Pick up the selected call to be taken immediately.
	Reschedule. Schedule the selected call to be taken at another date and time.
	Remove. Remove the call from the Outbound list.
	Reassign. Assign the call to be taken by another agent.
	Filter. Set a filter to display selected rescheduled calls only.
	Refresh. Display the updated list of rescheduled calls.
	Details. Display customer details associated with the selected call.
	History. Display the history events associated with the selected call.



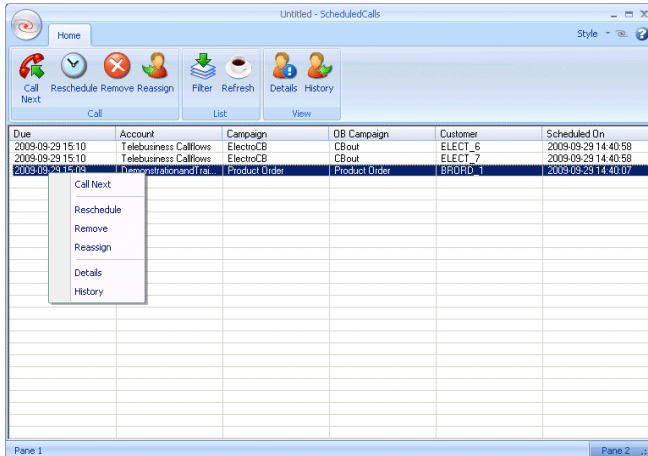
Call Next

To pick up and handle a reschedule call immediately:

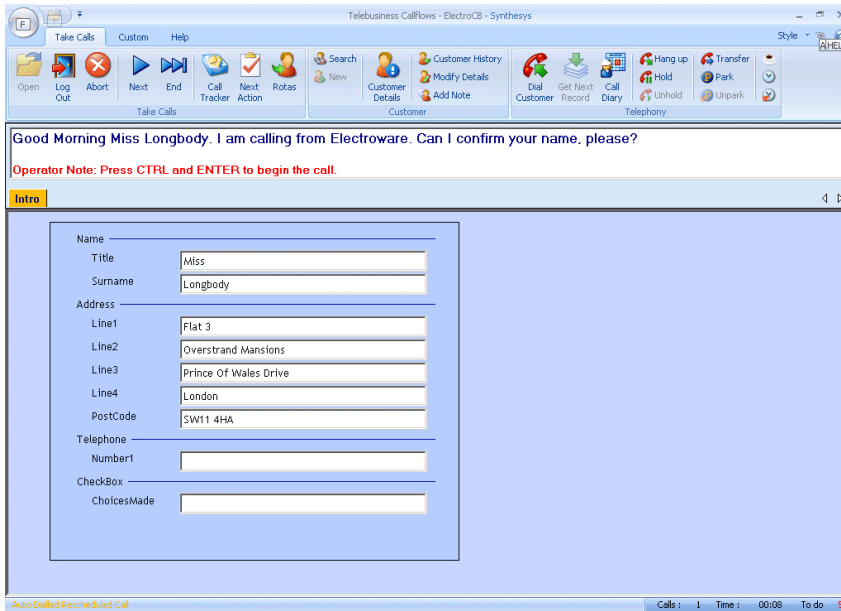
- Click the **Call Next**  icon

Or

- Right click on the rescheduled call and select **Call Next** from the drop down menu.



The rescheduled call will open at your screen, ready for you to handle.



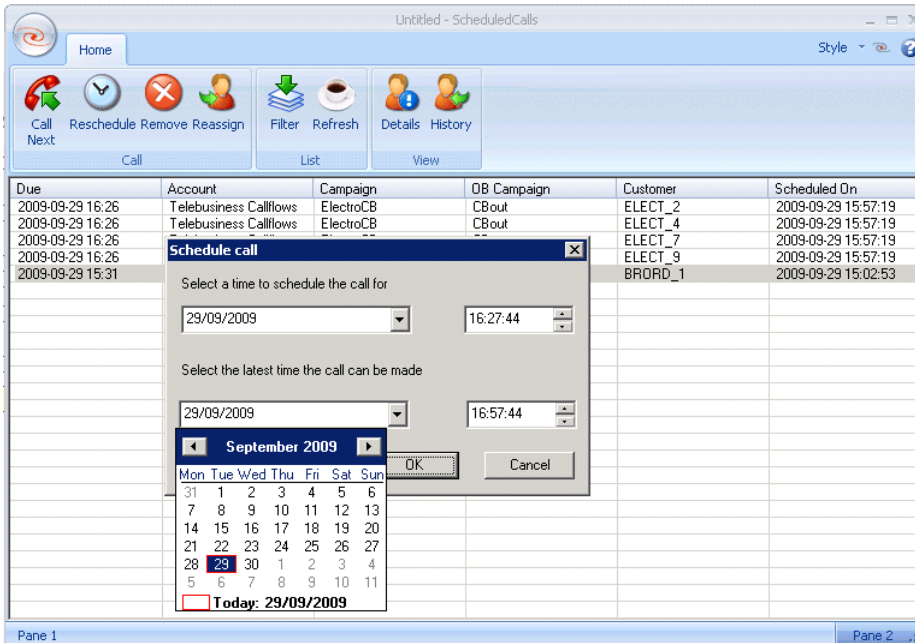
Reschedule

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

- Click the **Reschedule**  icon

Or


- Right click on the rescheduled call and select **Reschedule** from the drop down menu.



The screenshot shows a software window titled 'Untitled - ScheduledCalls'. The interface includes a toolbar with icons for 'Call Next', 'Reschedule', 'Remove', 'Reassign', 'Filter', 'Refresh', 'Details', and 'History'. Below the toolbar is a table with columns: Due, Account, Campaign, OB Campaign, Customer, and Scheduled On. A 'Schedule call' dialog box is open, allowing users to select a date and time for the call. The dialog includes a calendar for September 2009, with the 29th selected. The current date and time are 29/09/2009 at 16:27:44. The latest time the call can be made is 16:57:44. The dialog has 'OK' and 'Cancel' buttons.

Due	Account	Campaign	OB Campaign	Customer	Scheduled On
2009-09-29 16:26	Telebusiness Callflows	ElectroCB	CBout	ELECT_2	2009-09-29 15:57:19
2009-09-29 16:26	Telebusiness Callflows	ElectroCB	CBout	ELECT_4	2009-09-29 15:57:19
2009-09-29 16:26				ELECT_7	2009-09-29 15:57:19
2009-09-29 16:26				ELECT_9	2009-09-29 15:57:19
2009-09-29 15:31				BRORD_1	2009-09-29 15:02:53

In the Reschedule dialog subsequently displayed:

- Select the date and time to reschedule the call.
- Select the latest date and time in which the call should be taken.
- Click the **Refresh**  icon to display the changes.

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

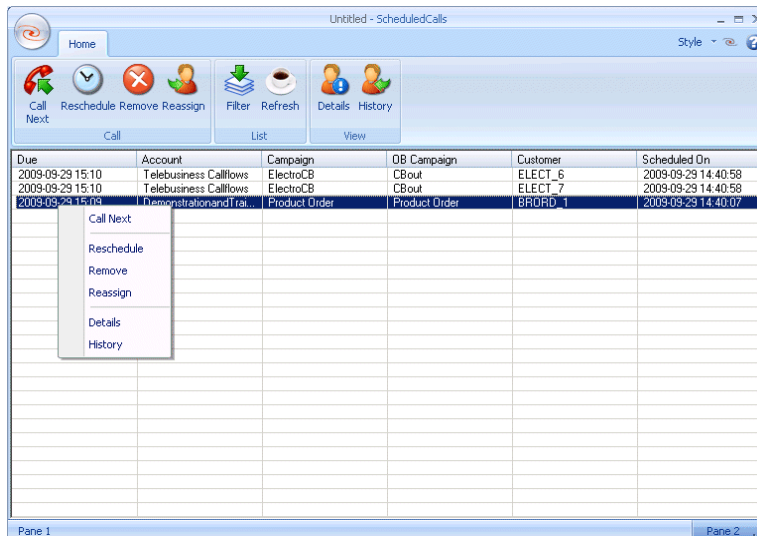
Remove

To remove selected calls from the outbound call list:


- Click the **Remove**  icon

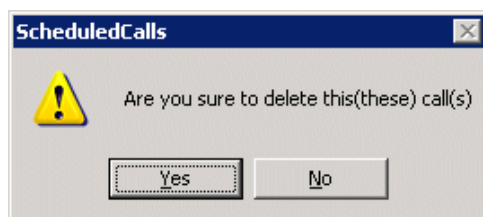
Or

- Right click on the rescheduled call and select **Remove** from the drop down menu.



A message will ask if you really want to remove the selected call(s) from the outbound list.

- Click **Yes** to delete the calls from the outbound call list.
- Click **No** to abandon the action, without removing the selected call(s).
- Click the **Refresh**  icon to display the changes.



The Outbound call list will be updated automatically, with the removed call(s) no longer showing as a queued item.

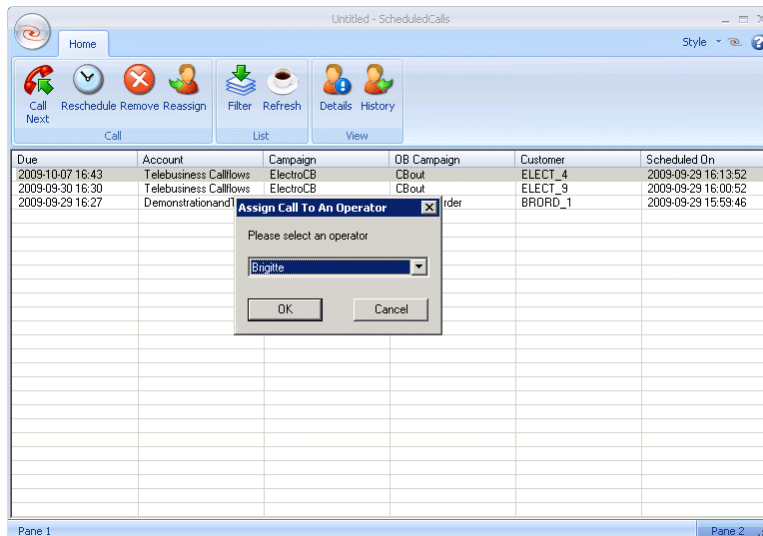
Reassign

To reassign a rescheduled call to another agent:


- Click the **Reassign**  icon

Or

- Right click on the rescheduled call and select **Reassign** from the drop down menu.




In the *Assign Call To An Operator* dialog now displayed:

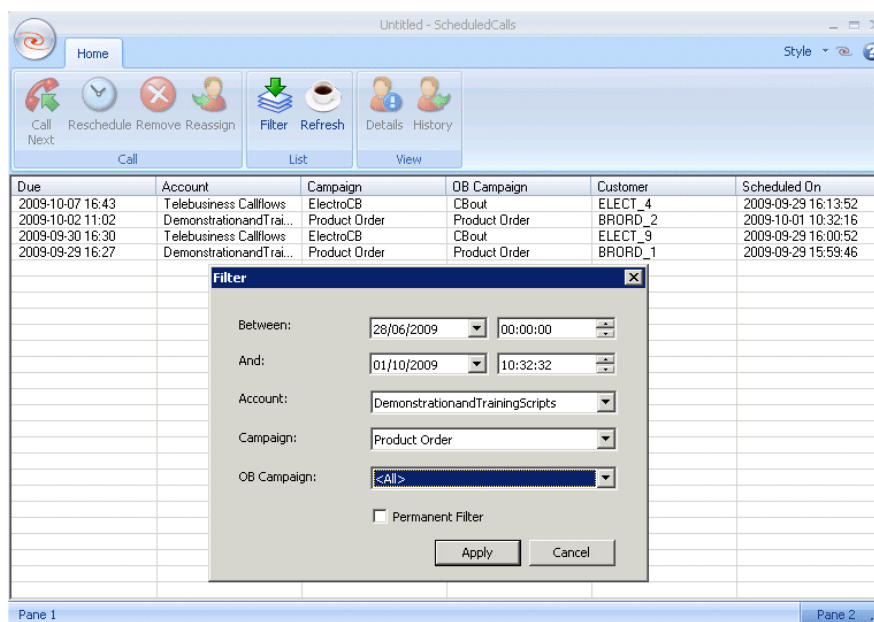
- Select the **Name** of the agent to whom you wish to assign the call.
- Click **OK** to confirm the action or **Cancel** if you do not wish to reassign the call.
- Click the **Refresh**  icon to display the changes.

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

Filter

If you wish to view selected rescheduled calls only, use the **Filter** option to specify the date and time, account, campaign and Outbound list that you wish to display.

- Click the **Filter**  icon, to open the Filter dialog.
- Click your left mouse button on the arrow of the **Between:** and **And:** fields to select the **date period** for your filter from the diary page.
- Enter the **time** for your filter.
- Select the **Account, Campaign and Outbound list** that you wish to display.



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



Place a tick into the **Permanent Filter** box, if you want to display your filtered selection only, when opening the Call Diary next.

To view all rescheduled calls due to you when opening the Call Diary, remove the tick from the **Permanent Filter** box.

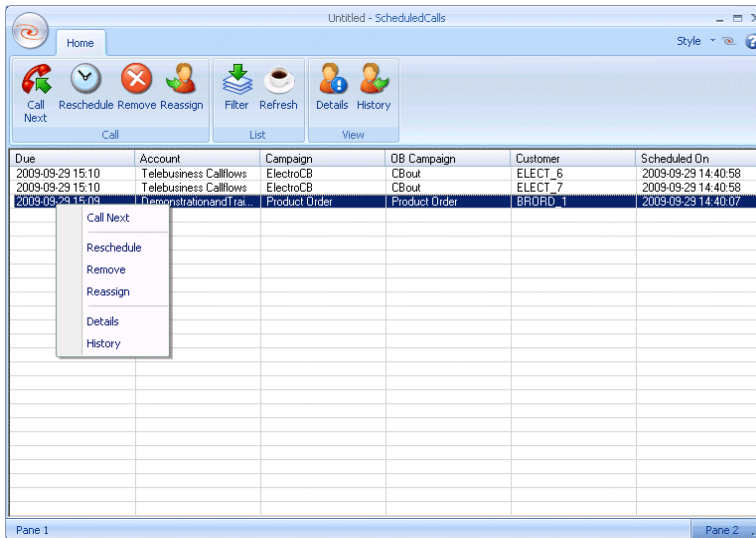
Details

To view customer details of a selected call:

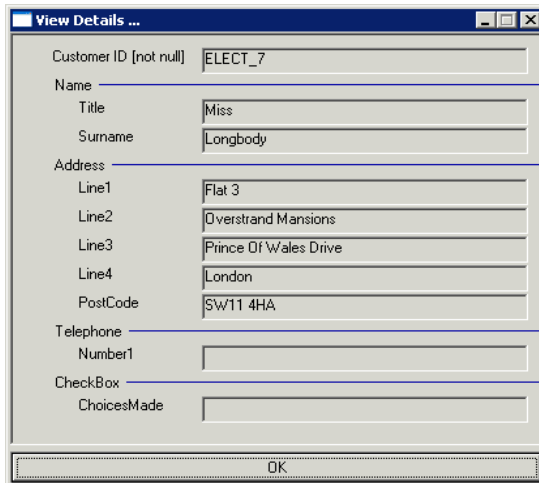
- Click the **Details**  icon

Or

- Right click on the rescheduled call and select **Details** from the drop down menu.



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




The 'View Details' dialog box displays the following information:

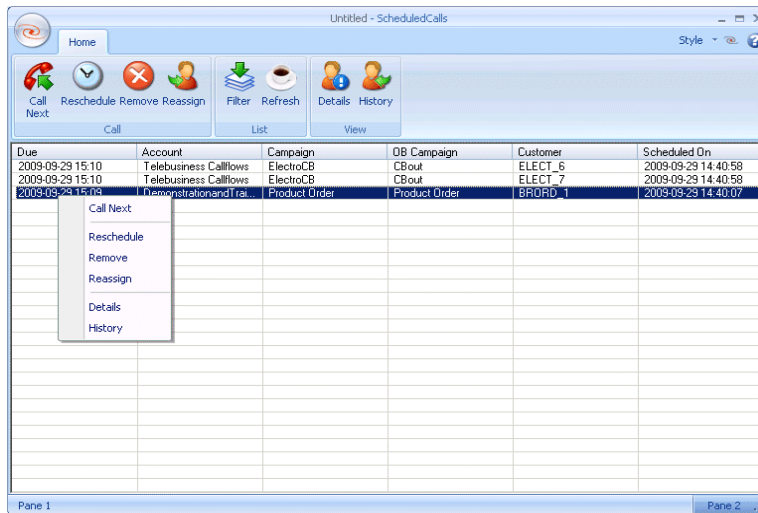
- Customer ID [not null]: ELECT_7
- Name:
 - Title: Miss
 - Surname: Longbody
- Address:
 - Line1: Flat 3
 - Line2: Overstrand Mansions
 - Line3: Prince Of Wales Drive
 - Line4: London
 - PostCode: SW11 4HA
- Telephone:
 - Number1: [Empty field]
- CheckBox:
 - ChoicesMade: [Empty field]

At the bottom of the dialog is an 'OK' button.

History

To view history events of selected rescheduled calls:

- Click the **History**  icon
- Or
- Right click on the rescheduled call and select **History** from the drop down menu.



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

