

AGENT VIEW Taking calls

	TomR - ProductOrder - Synthesys 🗕 🗖
Take Calls Cust	iom Help Style - 🔽
pen Log Abort Ne	Note: Image: Search and the search
ood Afternoon. \	Welcome to our Product Order Line. Can I take your name please?
p Note: Enter su	irname and hit search. If customer not found, click NEW to enter customer details.
ustomer	4
Customer ID	TRN_1
Name	
Title	Mr
FirstName	John
Surname	Smith
Home	112 234 4444
Work	221 234 4444
Town	London
PostCode	SW12 2ER



Introduction

This chapter provides an overview of the *Agent module*, used to run callflows both in a live call situation, and in a testing environment.

When a call comes into a *Synthesys* call centre, the appropriate callflow for the incoming call is automatically displayed on screen. This is achieved through the use of DDI Numbers, which link your internal telephone system to the *Synthesys* software. From the moment the callflow appears, until the call ends, you are presented with all the information you need to handle the call in a knowledgeable and professional manner.

Screens of the callflow and the questions they contain are supported by text prompts at the top of the screen. This text can be actual dialogue that should be spoken, or prompts to help you recognise areas of a callflow that need special attention.

As each screen is completed, notebook style tabs are added to the top of the screen, creating a summary of the call so far. A mouse click on any one of these tabs scrolls the relevant screen back into view. This is useful when a caller decides to change an answer given to a previous question. In this case, you can instantly return to the appropriate area of the callflow and make the necessary changes. When moving forward in the callflow, you are presented with the next logical question relevant to the amended data.

Web style help pages are only a keystroke away, which can provide help at every level of the callflow.



AGENT VIEW

	Introduction	2
	AGENT VIEW	3
STARTIN	IG THE AGENT WORKSTATION	5
	Agent Login	5
AGENT	START WORK SCREEN	6
THE TOO	DLBARS	7
	Take Calls	8
	Customer	9
	Telephony	
	Short Cut Keys	11
CALLFL	OW DISPLAY AREA	12
MAKING	OUTBOUND CALLS	13
	Preview Outbound Calls	14
	Getting Record for next Outbound Call	14
	Predictive Outbound Calls	15
USING C	RM	16
	Searching for Customer Details	17
	Entering new Customer Records	
	Modifying Customer Details	19
	Viewing Customer Details	19
	Accessing Customer History	
	Viewing Details of a Customer's History	
	Viewing & Adding Notes	21
	Viewing & Attaching Documents	22
NAVIGA	TING THROUGH A CALLFLOW	23
	Agent Dialogue Prompts	24
	Notebook Style Tabs	
	Help Pages	
	Holding and Parking Calls	27
	Going on a Break	
	Call Transfers	
	Finishing a Call	
	Aborting Inbound Calls	



33



STARTING THE AGENT WORKSTATION

Whether you are taking Inbound or Outbound calls, always log into your phone first, before logging into Synthesys.

Agent Login

To open the Agent workstation:

- Double click on the Synthesys icon located on the Windows desktop to display the Login dialog.
- Enter your *User Name* and press the tab key to move to the next line.
- Enter your *Password*.
- If you are taking live calls enter the *Extension* number assigned to your workstation. This is to confirm that you are available to receive and take calls, which now can be routed to your workstation.
- Click on *Login* to display the *Agent Start Work* screen.

Synthesys W	orkstation Logon	
Please ente	r the following details:	()
User Name:	Brigitte	Logon
Password:	xx	Exit
Extension		



If you have not received your User Name and Password, please contact your System Administrator.

If you only wish to test or show a demonstration of a callflow, you can open a callflow manually and there is no need to enter an extension number. Please see the section **Manually launching a call**.



AGENT START WORK SCREEN

Having logged into Synthesys, the *Agent Start Work* screen is displayed. The appearance of the screen can vary, displaying different toolbar icons, questions, branding images and background colours, reflecting access permissions assigned and branding options selected when designing the callflow in the Campaign Editor.

The screen is divided into three main areas:

- The **Toolbars** at the top of the screen with icons enabling navigation through the callflow.
- The **Agent Dialogue Box** with prompts, guiding you through a conversation with a caller.
- **Callflow Display Area** displaying the callflow with the associated questions used for collecting relevant information from the caller.



If you are not currently in a call, the Callflow Display Area shows the Agent Dashboard with statistical information about the calls that you have taken.

This includes real time information, displaying the running total of inbound and outbound calls, as well as idle, preview, talk and wrap times. The dashboard can also be configured to include commission due to you, based on a percentage of the total amount of sales.

Destination Calls: 1 Destination Destination <thdestin in="" st<="" standing="" test="" th="" the=""><th>Image: Second Second</th><th>Untitled - Synthemys</th><th>. 8</th></thdestin>	Image: Second	Untitled - Synthemys	. 8
Appen North North Appen North Appen North Appen North Appen Appen North Appen	Appen Note: Find Appen Note: Appen Note: Appen Note: Appen Note: Appen Appen Note: Appen <	94	• Z
Total Sale 4 71 % 71 % 71 % 75 % 75 % 75 %	Total Date F1 % D3 % D3 % Bechvid3 Date 2 04 011 04 0016 04 011 04 016 01 016 Lorrappication Date 1 04 011 04 000 04 016 04 016 01 016 01 Corrappication Date 1 04 016 04 016 04 016 01 016 0	Coloner & Coloner Record Diary	
Odd Calls: 4 71 %	Option Control 10 Control 10<		
Octor 0 Octor 0 <t< td=""><td>Original Original Original</td><td>Select a format 🕐 Export 🕄 🍏</td><td></td></t<>	Original	Select a format 🕐 Export 🕄 🍏	
Destruction Date 1 Original Contraction Of the	Decks/25 Calls: 2 77 % 18 Lorrage/solition Calls: 1 04(+11) 94(+14) 94(+14) 1 Corrage/solition Calls: 1 04(+14) 94(+14) 94(+14) 0 (k 23 Corrage/solition Calls: 1 04(+14) 94(+16) 94(+16) 94(+16) 0 (k 23 Corrage/solition Calls: 1 94(+16) 94(+16) 94(+16) 94(+16) 94(+16) 1		
CompanySoution Calls: 1 74% 0 23% or (4.42 WXWW	Complexition Date: 1 74 % D % 25 Control 0 0000000 000000 000000 <td>75</td> <td>18.74</td>	75	18.74
Sviftuffs Calc: 1 89 00 15 5 73 %	Performance 1 89% 10.5% 73.% 27	74 N	25 N
CALCOLOGY 000 000 000 000 000 000 000 000 000 0		73.%	27 5
	ads Tine Wasp Taxe. Prevens Taxe Tak Time //		

You can scroll through the pages of the dashboard using the arrow keys and use a word search (*Find/Next*) to move to a particular campaign.

You can also export the dashboard information in different formats to a chosen location.



THE TOOLBARS

The three main toolbars at the top of the screen in the Agent Workstation are:

Take Calls Used to navigate through a callflow

Customer To access customer details

Telephony. To perform various telephony tasks

Depending on the access permissions assigned to an agent in Synthesys Personnel, certain icons on the toolbar may be outside the scope of the agent and will therefore be greyed out.

The functionality of the three main toolbars is described on the next couple of pages.



Take Calls

The Take Calls toolbar is used for opening and navigating through Synthesys callflows.



Option Description



Open. Open an existing document. This manually opens a callflow to train with it, until users are confident enough to deal with a live caller.



Log out. Log out the workstation and return to the Synthesys main screen.

 \otimes

Abort. Abort document and end the call, closing the currently displayed callflow.

Next Question. Move forward to the next question in the callflow.



End. Go forward as far as the script will allow.



Call Tracker. Start the Call Tracker, to monitor calls that have been taken by the call centre and assign follow up actions, such as site visits.



Next Action. Get the next action from the Call Tracker with details of the next action to be taken.



Rotas. Display rota information used in conjunction with call actions, such as contacting an engineer to go out on a site visit



Help. Display Web style help for the currently displayed Question. The short cut key to open Help Pages is **F1**.



Customer

The Customer toolbar is used to access customer details and histories, providing agents with the best possible help in dealing with a customer's request.



Option Description



Search. Enables the search for existing customer details.



New Customer. Is used to add a new customer.



Customer Details. Allows access to customers' personnel details, i.e. telephone number and address.



Customer History. Allows access to information of a customer's previous contact with the company.



Modify Details. Enables users to update existing customer details.



Add Note. Enables users to create notes containing information associated with the customer selected.



Telephony

The Telephony toolbar is used for functions connected to the telephone system.



Option Description



Dial Customer and Hang-up. Used for outbound calls. Dial Customer brings up a dialogue with telephone numbers associated with a customer. Hang-up will end the call.



Get Next Record. Get information for the next Outbound Call to be made and loads up the callflow with details of the customer to be contacted.



Call Diary. Allow agents to view and manipulate rescheduled calls due to them.



Hold and Unhold. Hold. The new default behaviour is to place the voice call On Hold, but keep the script open on the agent's screen in the Take Calls module. The agent state in the Live Monitor will be Talking. Unhold will take off hold.



Transfer. Is used to consult another operator or to transfer calls. It brings up a list of operators and enables the transfer of a caller and associated callflow to another agent.



Park and Unpark. Park will globally park a call and the associated information, which can be retrieved again by any agent within the call centre via the Unpark option.



Break. Agent Busy/ on Break shows that the agent is currently not available to take calls.



Reschedule Call. Enables the rescheduling of calls where the agent was unable to reach a customer.

```
D
```

Special Reschedule. (Not a standard control) Enables the rescheduling of partially completed calls. When the call is re-presented to the agent all the call information taken up to the point at which the call was rescheduled will be displayed.



Short Cut Keys

The following short cut keys are available:

- F1 Display Web style help pages.
- F2 Clear the contents of a CRM control. This is useful to clear information quickly, before starting a new search.
- F3 Open CRM Select, from which a customer record can be selected.
- F5 Abort the current call and close the callflow.



CALLFLOW DISPLAY AREA

When taking calls, ensure that you log into your phone first, before logging into Synthesys.

- Having logged into Synthesys, the Agent Start Work main screen is displayed.
- When a call comes into the call centre and you answer your phone, the correct callflow for the incoming call is automatically popped onto your PC.

Each screen in the callflow, supported by text, contains specific questions that need to be answered before moving to the next screen.

Take Calls, Customer and Telephony Toolbars.

Quest	tion with Agent Prompt Box
	omR - ProductOrder - Synthesys
Take Calls Custom Help Opm Log Abort Image: Abort Image: Abort Image: Abort Image: Abort Take Calls Image: Abort Image: Abort	Style - 2 G Hitday Customer Customer Record Diay Customer Record Diay
Op Note: Enter surname and hit search. If customer no	
Customer	1 6
Customer ID Name	
Title	
FirstName	
Surname	
Home	
Work Town	_
PostCode	_
Manual Call	Local Time: 15:07:38 Calls : 9 Time : 01:42 To do 4

Ø

T

For Inbound calls, customer details will only be displayed if CLI (Caller Line Identification) is enabled. For information about searching for, or entering customer details, please see the section: Using CRM.

When an Outbound campaign is popped to the agent screen, the customer details will already be displayed in the CRM control. For more information please see the section: Making Outbound Calls.

For more information about moving through the callflow, for Inbound, as well as Outbound calls, please also see the sections: Navigating Through A Call.



MAKING OUTBOUND CALLS

Customers to be phoned for an outbound call will have been placed in the various outbound call lists by your supervisor.

When making outbound calls:

- Ensure that you log into your phone first, before logging into Synthesys.
- When logging out, you must wait until Synthesys has logged you out, before you do anything on your phone.
- If the PD has already dialled another call for you, you must finish this call, before quitting the Agent module.

Please see the sections *Preview Outbound Calls* and *Predictive Outbound Calls* for more information.

For details about taking a call, see the sections: *Callflow Display Area*, *Using CRM* and *Navigating Through A Call.*

Please also see the section: Logging out of the Agent Workstation.



Preview Outbound Calls

Customers to be phoned on outbound calls will have been placed into the relevant call lists by the supervisor.

- Ensure that you log into your phone first, before logging into Synthesys.
- Having logged into Synthesys, the Agent Start Work main screen is displayed.

				Untitled - Synthesys					
Take Calls C	Custom Help							Style	• Z (
pen Lag Abort	Next End Call Tacker Take Calls	Next Rotas P Action		Customer Details Customer		Call Call		• Break • Reschedule	
									4
i i i ofa	▷ ▷i 100%	2	Find [Next	Select a format	Export	B 🕹			
Total	Calls: 4	94 62 17	1		N	NDS	-	10.34	94.9
lectroC8	Calls: 2				77%				18.75
oanapplication	Cello: 1	00.0110	(de se de		9-9-9 74 %	81 JU 10		0	23 N
wittuitis	Cale: 1	01015	-to %		9 9 9 9 9 9 9 9	87 97 95 87 97 93			27.5
	p tane Preview Time	Tall Time							
ide Tine Vica									

Getting Record for next Outbound Call

If the *auto-pop* and *auto dial* functions have been enabled, the next customer record will pop to your screen and the number will be dialled automatically.

If these functions are not enabled, you need to use the *Get Next Record* and *Dial Customer* icons:

- Click on the *Get Next Record* icon on the *Telephony* toolbar
- The CRM will pop, displaying the customer record for the next outbound call.
- Click the **Dial Customer** icon on the Telephony toolbar.

For more information see the next section: Callflow Display Area, Using CRM and Navigating Through A Call and also the next section: Predictive Outbound Calls.



Predictive Outbound Calls

Customers to be phoned on predictive outbound calls will have been placed into the relevant call lists by the supervisor.

- Ensure that you log into your phone first, before logging into Synthesys.
- Having logged into Synthesys, the Agent Start Work main screen is displayed.
- The predictive dialler will check if you are assigned to a predictive outbound list and will start dialling customers from the list.
- When the predictive call is connected, the callflow for the campaign is presented to you, together with the associated customer details.

	TorrR - ProductOrder - Synthesys -	= x • Z 0
Take Calls Custom	Help Style Melp Search Search Call New Customer Tasker Action Details Customer Notes	
	elcome to our Product Order Line. Can I take your name please? name and hit search. If customer not found, click NEW to enter customer details.	
Customer		٩ ۵
Customer ID Name	TRN_1	
Title	Mr	
FirstName Surname	John Smith	
Home Work	112 234 4444 221 234 4444	
Town	London	
PostCode	SWI2 2ER	
Manual Call	Local Time: 15:06:12 Calls: 9 Time: 00:16 To d	o 4 .::

For more information on taking calls see the sections: *Callflow Display Area, Using CRM* and *Navigating Through A Call* and also the section: *Preview Outbound Calls.*



USING CRM

The Customer Relationship Management (CRM) module allows access to customer profiles and customer histories, providing you with the best possible help in dealing with customers' queries and requests.

Within the CRM screen you can search for existing customers, create new customer records, modify customer details, add notes to a selected customer and view a customer's history.

		×
Take Calls Cust		0
Open Log Abort Ne	And And And And And And And And And	
Good Affertagon A	/elcome to our Product Order Line. Can I take your name please?	-
Good Allemoon.	eleconie to odi Produci Order Elite. Carritake yodi name please?	
Op Note: Enter su	name and hit search. If customer not found, click NEW to enter customer details.	
Customer	4	Þ
Customer ID		
Name		
Title		
FirstName		
Surname		
Home		
Work		
Town		
PostCode		
10510000		
Manual Call	Local Time: 15:07:38 Calls: 9 Time: 01:42 To do 4	.:

Depending on how the control has been configured, you will have access to a range of options via the *Customer* toolbar:

lcon	Used To
3	Search . Enables the search for existing customer details. Option is usually only enabled in <i>Inbound</i> calls.
2	New. Add a new customer. Option is usually only enabled in Inbound calls.
22	Modify. Allows the modification of existing customer details.
2	Details. Display customer details.
<u>.</u>	Notes. View and add information related to a selected customer.
2	History. Access details of a customer's previous contact with the company and attach notes and documents associated with the selected customer.

Please see the next few pages for a detailed description of the above options.



Searching for Customer Details

When making outbound calls the customer details will automatically be displayed in the CRM control.

For Inbound calls, perform a search to bring up details for an existing customer:

- Enter any known details into the CRM fields displayed, such as a customer reference number, a name or a telephone number, or simply the first letter of the surname in combination with wildcards (*), i.e. W*.
- Click the **Search** icon on the *Customer* toolbar. The customer record will subsequently be displayed in the CRM.

	😰 •	(includes)	-		-		Telel	ousiness Cal	llflows - Elect	roBuy - Syr	thesys		Service 1	Marrie .			_		_
	Take Calls	Custom	Help															Style - 🔽	0
Open	Log Abort	Next	End Take Calls	Call Tracker	Next Ro Action	as Help	Search & New	Customer Details Customer	History Modify	Dial Custome	Get Next Record	Call Diary	G Hang up G Hold G Unhold Telephon		9	Break Reschedule			
	I Morning. Ca the prompts		please ç	give me	e your na	ame Ope	erator Note:	enter su	mame and	i hit seai	rch. If th	e pers	on does n	ot appear	in the	databasi	e, click (on New a	Ind
Intro																		4	Þ
	Name — Title Surnar Address - Line1 Line2 Line4 PostCo Telephone Nombe Check8ox Choice	de 																	
Manual	Call												Local Time:	11:16:04 0	alls :	1 Time :	08:09	To do 4	

If more than one customer matches the search criteria, the Select window will open.

• Select the customer from the list and click OK to display details in the CRM.

Select							
Customer ID	Noetica	Name Con		Noeti	ca Addres	s Contro	ОК
Customer ID	Title	Surname	Line1	Line2	Line3	Line4	
ELECT_12 ELECT_16	Dr Mr	Watson Wishborne		St Johi Wands	1C St J	London London	Cancel
							Records loaded
							2
•						ł	More



Entering new Customer Records

If a caller contacts the company for the first time you can enter a new record for this customer:

- Click the New
 icon on the Customer toolbar
- In the New window, enter the details for the new caller into the relevant fields.
- Click *Finish* to save your entries and to store them in the database.

New		_ 0 ×
May I take your na	ame please?	<u> </u>
V		<u>_</u>
-Name-		
Title:		
	<u> </u>	
First Name:		
Surname:		
-Address		
Address		
-Telephone	J	
		-
Telephone:		
Basic		-
E Gold		- I
p oud		
Previous	Einish	<u>C</u> ancel
	-	

• To close the window without saving changes, click Cancel.



New customer records will only be saved to the database if they are entered into the New window.

The CRM fields displayed when initially entering a CRM screen are only search fields used to bring up details for existing customers.



Modifying Customer Details

To add or update details for an existing customer:

- Click the **Modify** icon on the *Customer* toolbar.
- In the *Modify* window you can make all necessary changes as required.
- Click *Finish* to save your changes, or *Cancel* to close the window without saving changes.

11-201							-
may	take	your nar	ne ple	ase?			
Name							
Title:		Dr			-		
First Na	me:						
Surnam	e:	Watso	n				
Address							
Address	Wats	on And (20			 	 -
		hns Brar					 -1
	11 St	Johns H	till			 	 -
	Lond	on					_
	SW11	I 1TN					
-Telepho	ne					 	
	ne: 11	223344	55	_		-	
Telepho							
Telepho							
Telepho							
	,						
-CheckB							
-CheckB						 	
-CheckB						_	

Viewing Customer Details

To view details associated with an existing customer record:

- Click the Customer Details icon on the Customer toolbar.
- In the *View Details* window you can look up information about the selected customer.

🔲 View Details	
Customer ID [not null]	ELECT_12
Name	
Title	Dr
Surname	Watson
Address	,
Line1	Watson And Co
Line2	St Johns Bran
Line3	11 St Johns Hill
Line4	London
PostCode	SW11 1TN
Telephone	,
Number1	1122334455
	ок



Accessing Customer History

To access records of a customer's previous dealings with the company:

• Click the History *icon* on the *Customer* toolbar.

Event	Event Date and	Operator Name	Event Text	Account Name	Campaign Name List Name	
\$ ⇔1/B Call	2015-06-11 16:	Brigitte	Brochure	Telebusiness C	ElectroBuy	
Event					Time Interval	
<not active=""></not>				•	Date Time	
					From 12/6/2001 14:26	The 'Filter' button opens access
Operator					To 11/6/2015 16:09	
<not active=""></not>				•		to the Event, Operator ID and
						Event Text fields.
Event Text						
Brochure				-	Reset Values Filter Events	To display all information alight
						To display all information, click
	Attach				Filters<< Close	the Reset Values tab

The 'Event', 'Operator ID' and 'Event Text' fields are used together with the **Filter Events** button to display selected information. To filter out calls related to a brochure request, for example, we have entered *brochure* in the 'Event Text' field.

Viewing Details of a Customer's History

To check the details for the selected brochure request call on 11/06/2015, you can double click on the related Inbound Call (I/B Call 11/06/2015 - Brochure).

Synthesys Call Tracker		
File Edit View Help		
🕘 🔬 🗞 🛃 🗢 🗙 🎯 📗 🤏 🕰 😫	🛿 🎗 uns 🏹 🕂	
Status Customer Time/Date Call Result	Intro Require Broctype Conclusion Customer ID ELECT_12 Title Dr Surname Watson Line1 H C L Hanne And Co Line2 St Johns Chambers Line3 1C St Johns Hill Line4 London III Action Time Operator Event \$11/06/2015 Brigitte Rei	Use tab sections to check all details associated with this call
Done	ARCHIVE 1	

All call details for this call can now be viewed in the Call Tracker.



Viewing & Adding Notes

To view or write a note with information associated with the selected customer:

• Click the **Add Note** icon on the Customer toolbar.

If *auto pop notes* are enabled, the notes page will open automatically if there are notes attached to the selected customer record.

Title	Dr						
Surname	Watson	_					
Address	,	_					
Line1	Watson And Co	1	History Notes [ELE	CT:ELECT_12			
Line2	St Johns Bran	-	Date	Time	Operator		
Line3	11 St Johns Hill	-	11/06/2015	16:19:30	Brigitte	Requested p selection	prices for latest product
Line4	London	-					
PostCode	SW11 1TN	1					
Telephone ———		-					
Number1	1122334455						
CheckBox		-					
ChoicesMade	Gold	-					Create Note

- To open the *Add Note* page click the *Create Note* button in the *History Notes* window.
- Write the required comments and click the Save button to save the message.



To close the window without saving your entry, click the *Cancel* button.



Viewing & Attaching Documents

To open and view an attached document or a note containing information associated with the selected customer:

- Click on the **History** icon on the *Customer* toolbar.
- In the *History for the customer* window, documents and notes attached will be shown as 'Event' in customer history.

Select and double **click** on the associated **Document** or **Note** icon to view the information.

Title	Dr							
Surname	Watson							
Address		Alistory for the custome	ELECT_12 [ELECT]	(Second		(managed)		
Line1	Watson And Co	Event	Event Date and Time	Operator Name	Event Text	Account Name	Campaign Name	List Name
Line2	St Johns Bran	Customer Details	2001-06-12 14:26:00	Admin			1.5	
	Scooning Brain	🙀 I/B Call Failed	2015-03-18 10:16:50	DavidW	OTHER	Telebusiness Ca	ElectroBuy	
Line3	11 St Johns Hill	🗘 I/B Call	2015-06-11 16:07:01	Brigitte	Brochure	Telebusiness Ca		
Line4	, Leader	I∕B Call Failed	2015-06-11 16:08:36	Brigitte	OTHER	Telebusiness Ca	ElectroBuy	
Emor	London	Note	2015-06-11 16:19:30 2015-06-11 16:22:58	Brigitte 1004	Requested price Sea View.JPG			
PostCode	SW11 1TN	Document	2015-06-11 16:22:58	1004	Price List.docx			
Telephone	,							
Number1	1122334455	-						
CheckBox	1	•			m			
ChoicesMade	Gold	Add Note	Attach				Filters>>	Clos
	,	<u></u>						

To attach a new document to the selected customer record:

- Click the Attach button to open the Open File dialogue
- In the **Open File dialogue**, select and double click on the document to be attached



The document that you wish to attach must be accessible on a Network Shared Directory.



NAVIGATING THROUGH A CALLFLOW

Moving between Fields in a Question

Many of the ActiveX Controls used within questions are made up of a number of fields. Fields in the *Name* control may, for example include: Title, Initials and Surname.

Title:	Initials:	 Surname:	

To move forward between these fields press the **Tab key** on your keyboard. To move backwards through these fields, press **Shift + Tab**.

Moving between Questions and Screens:

To move between questions and from one screen to another

- Click on the *Next Question* icon located on the *Take Calls* toolbar at the top of the Agents main screen or alternatively press
- **Enter** or **Ctrl + Enter** if Enter is used to move from one field of the current control to another, as for example in the name or text box controls.

Moving forward as far as the script will allow:

To move forward as far as possible in the callflow to the last screen completed, click on the *End* icon



Agent Dialogue Prompts

Each screen in a callflow contains specific questions that need to be answered before moving on to the next screen.

The screens are supported by text prompts in the agent's dialogue box.

The text prompts can be the actual dialogue that should be spoken, or prompts to help you recognise areas of the callflow that need special attention. To highlight the difference, different colours and font sizes are typically used.

Nhic	h product	would you like	e to order?		
Opera	itor Note: Pr	ess F1 to open	Help page for	diffe	rent models availa
			_		
F	Product Code	Description	Item Price	Qty	Sub Total
*			£0.00	0	£0.00
				Р	Net Total £0.00 ost Charges £0.00
<u>B</u> row:	se Products				Invoice Total £0.00

Screens and prompts skilfully guide you through a call and ensure that you ask all relevant questions and that the information is collected and entered in a consistent format.



Notebook Style Tabs

As each screen is completed, notebook style tabs are added to the top of the screen, creating a summary of the call so far.

Which type of brochure are you interested in

Intro	Requi	re Broctype
	Select	<u> </u>
		Combo Fridge-Freezers
		Freezers
		Fridges

Clicking on any one of these tabs instantly returns you to that part of the callflow, so information collected from a caller can be changed, if required.

A caller for example may decide to place an order instead of requesting a brochure, or a caller draws attention to the fact that the agent has entered his or her name incorrectly.

Any changes made are reflected in subsequent screens of the callflow. No data once collected is lost and if the callflow has been properly designed, you never have to input the same information twice.



Help Pages

Help pages can provide additional information regarding a company, its products and services.

Copies of newspaper articles, magazines and other publicity materials can be scanned into a Web page, you can attach a video clip of a TV advertisement to a campaign or link Help pages to the Internet.

This enables you to check specific information, for example the make of a car or the product number and price of a product, and to respond quickly and in a knowledgeable way to customers' enquiries.

Accessing Web Style Help

To open the Help Page

- Press F1 on the keyboard
- Alternatively, you can click on the *Help* viscon on the *Take Calls* toolbar.

Many web pages will contain links to another part within a page or to other pages. These are called hypertext links and are indicated by underlined coloured text.

• To access the information, click on the underlined text with your left mouse button.

<u>B</u>ack

Web Help Picker - \\Armadaql\g\Synthesys\web\default.htm (local)	_ 🗆 ×
Back Befresh page	<u>C</u> lose
URL : \\\Armadaql\g\Synthesys\web\default.htm	
Product Information	<u></u>
1 router mormation	-
Software	
Hardware	
Support	
Support	

To move back to the previous pages click on

• To close the Help Page, click on ^{____lose} in the Web Help Picker page.



Holding and Parking Calls

The *Hold* and *Park* function could be used, for example, if a caller doesn't have relevant credit card details at hand and decides to call back with the information.

Access the Hold and Park options, using the following icons on your Telephony toolbar:



Hold. The new default behaviour is to place the voice call On Hold, but keep the script open on the agent's screen in the Take Calls module. The agent state in the Live Monitor will be Talking.

Note: Customers who wish to *place the voice call On Hold and clear the script* from the agent's screen, saving the call data collected up to this point on the local workstation (with agent state in the Live Monitor *Previewing*) should contact the Noetica helpdesk.



Unhold. To retrieve calls, which are on hold on your local workstation.

Park. To park the call and to allows other agents within the call centre to unpark and access the information of the call.



Unpark. To retrieve parked calls.

When you retrieve a call the following window will be displayed:

P	arked calls	5					×	
		Campaign Ties are Us w script	Customer	Parked since 10:59 - 16\04\2002	Parked By Ms Brigitte Reimer	Comment will phone back with	n credit card	Select Preview Script , to view the
		ass: N\A ent: will phon	e back with	credit card details				content of a parked or held call.
	•							-Click OK to retrieve the call.
			OK			Cancel		

The content of a call on hold or a parked call can be previewed before retrieving it, clicking the Tab headings at the top of the screen.

		-
🙀 BR Report - Ties are I	Js	×
CRM Enquiry3 Media	Name	
detail		Ē
Customer ID	BRTIES_7	
Title	Mr	
FirstName	Werner	
Surname	West	
Telephone	444 222	
Line1		
Line2	3 Piccadilly	
		-

The retrieved call will open at the point at which it was parked or put on hold, still containing the previously collected call information.



Going on a Break

If you wish to take a break from taking calls:

- Click the **Break** icon on the *Telephony* toolbar to display the **On a break** window.
- Click on *Return to work* button, to tell the dialler that you are available again to receive calls.

	On a break.
[
	Return to work
<u> </u>	

On Break Reasons

If the On Break Reason function is enabled:

- Click the **Break** icon on the *Telephony* toolbar to display the **Break Reason** window.
- Select the reason for going on a break, before clicking **OK** to open the **On a break** window, as shown above.

Bre	ak Reason	X
	Select Break Reason	
	Cigarette	
	Lunch Toilet	
	On Mobile	
	<u> </u>	
		OK

• Click the *Return to work* button the *On a break* window, to tell the dialler that you are available again to receive calls.



Call Transfers

The **Transfer** option enables you to make a transfer or to dial a consultation call at any stage during a call. Using the Transfer option you can transfer a customer together with the callflow information to another agent or call centre supervisor to ask their advice or for them to take over and finish the call.

The Transfer dialog also contains a **Conference** option. This allows you to make a warm transfer, adding a third participant to the call, without having to put the customer on hold, with all parties (customer, agent and third participant) on the phone. Using the *Conference* option you can, for example, introduce the customer to the third participant, before transferring the call.

To transfer a call:

- Click on the *Transfer* 65 icon on the *Telephony* toolbar.
- All users currently logged into the Synthesys system are displayed under the Synthesys Teams directory in the Transfer window.
- You can select and transfer the call to any user who is not currently in a Synthesys call.



Dial	Put the original caller on hold and dial the number displayed.
Diai	i at the enginal earler on hera and alar the namber aleptayear

- Hangup Hang up the call, for example, if the dialled number is not answered. This will get the original caller back on line.
- **Transfer** Transfer the caller to the number displayed.
- **Conference** Dial a conference call/ (warm transfer) to add a third participant to a call, without having to put the customer on hold.
- **Cancel** Close the Transfer window, without taking any action.



Viewing a Consultation or Transferred Call

The forthcoming transfer is announced on the target workstation, giving the name of the transferring agent.

Incoming transfer from Miss Zoë Merchant, a member of teams george,Marketing,new.	
<u> </u>	

Simultaneously, a screen displaying the account and campaign name, together with the callflow data, will open.

To assist you with your queries, the supervisor will use the *Screen Tab* headings to view the information gathered up to the point of transfer.

🙀 DemonstrationandTrai	iningScripts - Loanapplication	X
Miss Zoë Merchant		
intro time previous	insurance review existing bnam bankers	
		
Address		
		-
Line1	7-11 St.Johns Hill	
Line2	Clapham Junction]
Line3	Battersea]
Line4	London]
Line5]
Line6]
PostCode	SW11 1TN]
Name		
		-

- Click **Hangup**, when the consultation is completed to continue handling the call. Press *Enter* on the keyboard, to move to the next screen.
- Click **Transfer**, to transfer the customer and call information to the supervisor, if the supervisor wishes to take over and finish the call.



Finishing a Call

To finish a call you <u>must</u> go through the conclusion window.

If the *Conclusion Text* box is enabled, you could add notes to the campaign designer, giving feed back on any aspects of the callflow. In this way you can be involved in the callflow design, putting forward suggestions on how the efficiency of a callflow can be improved.

• Click **OK** to finish the call and to save all information collected during the call to the database, ready to be used for reporting.

onclusion Text checking	<
Thank you for calling, Goodbye.	
1	
OK Test Call Cancel	



Aborting Inbound Calls

Every call taken in Synthesys has a conclusion and no call is ever lost, even if the call needs to be ended without going through the conclusion in the callflow.

To end a call, possibly because an incorrect number was dialled or because of a fault in the line:

- Click **F5** on the keyboard or use the *Abort* icon Solution on the *Take Calls* toolbar.
- In the *Abort Call* dialog, select the reason for ending the call from the drop down list displayed.

Abort Call 🛛	<
Reason for abort:	
OTHER	
ABORTED ORDER CC/CHQ ORDERS ONLY CHILDREN ON LINE DISCONNECTION DIVERT TEST CALL GENERAL ENQUIRY	
LINE DEAD OTHER RUDE/OBSCENE CALLER TRAINING WRONG NUMBER	

A report can be produced on every call completed, including aborted calls, outlining the reasons for terminating each call.

If, for example, a number of calls were stopped because of interference on the line, this can be identified and the problem fixed.



Aborting Outbound Calls

To abort an Outbound call, possibly because you are unable to contact the customer specified:

- Click the *Abort* icon on the *Take Calls* toolbar
- In the *Abort Call* dialog, select the reason for ending the call from the drop down list displayed.

Abort Call	×
Reason for abort:	
RESCHEDULE	•
ANSWERPHONE BUSY FAXTONE NEVERCALL NO ANSWER OTHER	
RESCHEDULE UNOBTAINABLE WRONG NUMBER	

Explanation of Aborted Type Options

Answerphone.	Sleep status for 4 hours and then put it back into the live queue.
Busy.	Sleep status for 30 minutes and then put it back into the live queue.
No Answer.	Sleep status for 1 $\frac{1}{2}$ hours and then put it back into the live queue.
Reschedule.	A callback that has been arranged for a specific time.
Never Call.	The customer does not wish to be contacted again.
Unobtainable.	The number is currently out of service.
Wrong Number.	The customer can't be reached under this number.
Faxtone.	Abort the call with an unobtainable number call result.
Attention.	To inform the Call Centre Supervisor that the customer to be called has not been reached.

Please see next page for information about *Rescheduling* calls.



Rescheduling Calls

To abort and arrange a callback:

• Click on the Reschedule icon on the Telephony toolbar.

The **Reschedule To** dialog, depending on the set-up, either simply displays the last number dialled or allows you to select or enter a number for the callback.

	- 0	TomR - ProductOrder	Synthesys	~		_ 0	X
Take Calls Custo	om Help					Style *	I 0
Open Log Abort Ner	- 🖂 🏹 🦓 🃚	Search New Customer Details Customer	Dial Get Next Call Customer Record Diar	🖷 Hold 🛛	S Transfer S Break Park S Reschedule		
	Velcome to our Product Order			mer details.			
Customer							4 ۵
Customer ID	TRN_29						
Name	1	Abort Call	22				
Title	Mrs						
FirstName	Tanja	Reason for abort RESCHEDULE					
Surname	Grace	Incouncour					
Home	113 343 1001	Reschedule To:	and the second se				
Work	221 343 0110	When can we call them back?	Thu 🚹 Jun 2015				
Town	London	1					
PostCode	5W18	Time?	15:44:15				
	191110	Number?	113 343 1001	-			
		Specify a time 🔹 💿	OK	Cancel			
		L					
Annually Dialled Outbound Ca				Local Time: 15:44	4:14 Calls: 1 Time:	00:26 To do	4

Selecting Date and Time for the Callback

To reschedule the call for a specific date and time:

- Select the date for the callback from a diary page using the drop down menu, and then specify a time or
- Click the **Specify Time Period** option to select time and day for the callback.

Reschedule To:			line.	X
When can we call them b	ack?	Thu 11 Jun 3	2015	
т	ime?	15:44:15	×	
Nun	nber?	113 343 1001		•
Specify a time Specify Time Period	0	OK		Cancel
Time Period?		•		
	Day	s		
🔄 AnyDay		Monday	📃 Frida	y
🔲 WeekDays		Tuesday	📃 Satu	rday
🔲 Weekend		Wednesday	📃 Sund	tay
		Thursday		



Special Reschedule Call

Using the Special Reschedule icon icon calls can be rescheduled with the call data taken.

The call is queued in the Outbound Manager in the same way as a normal rescheduled call, displaying a yellow alarm clock and the date/ time for the callback.

When the call is presented to the agent again, the callflow will open at the point at which it was rescheduled, displaying all the details collected in the previous call. The agent can now finish the partially completed call, without having to reenter information.

Information from specially rescheduled calls is stored in the Special Reschedule folder in the TRANSACTION FILE. The information is <u>NOT</u> stored in the database and <u>CAN'T</u> be reported on, until the agent has completed the call.

The Special Reschedule control is not a standard feature.



LOGGING OUT OF THE AGENT WORKSTATION



When logging out, you must wait until Synthesys has logged you out, before you do anything on your phone.

If the PD has already dialled another call for you, you must finish this call, before quitting the Agent module.

Predictive calls will automatically hang up as soon as you click OK in the conclusion window of the callflow.

To log out quickly, for example to go on a short break or at the end of your session, inform the PD at the beginning of an Outbound call not to present any more calls to your workstation:

• Click the *Log Out* licon on the *Take Calls* toolbar

Or

• Click the *Break* icon on the *Telephony* toolbar

	Help	🔏 Search 🛛 🕥	🔒 History 🔗	JIL 0121	💦 Hang up	💰 Transfer	• Break	• Z (
iii 🛃 🛂 🕨	🕅 🌏 🗹 🔏 🎼	A New 69	A Modify	: 📥 🚰	G Hold		Reschedule	
Open Log Abort Next Out	End Call Next Rotas Help Tracker Action	Customer Details		Get Next Call Ner Record Diary	💦 Unhold	Unpark		
	Take Calls	Customer			Telephony			
ood Morning. I am	calling from Express Loan. (Can I speak to M	r Brown please	?				
ustomerDetails Greeting								٩
Customer ID	TRN_4							
Title	IRN_4							
First Name	Chartie							
Surname	Brown							
Telephone	112 344 6774							
Telephone (Work)	221 344 6774							
House Number	Flat 3							
Street	ST Kathrines Way							
Borough	Wapping							
Town	London							
Postcode	E3							
Email	cb@simens.com							
Lindit	[coesimens.com							
			J					

The call that you are currently on will remain open.

• Finished the call in the normal way, before you will be logged out.



MANUALLY LAUNCHING A CALL

To familiarize yourself with a callflow before dealing with a live call, you can launch a callflow manually, without receiving a call first, providing that you hold the permission *Allow Open Script* in Syntheys Personnel.

- Double click on the Synthesys icon on your PC to start the Agent workstation.
- Enter your user name and password, but no *Turret* number.
- At the Agent Start Work main screen, click on the open ¹ icon on the Take Calls toolbar to open the Select a Callflow window.

The *Select a Callflow* screen graphically represents the customer accounts and callflows that have been created for each campaign your Call Centre is managing.



A filing cabinet represents a customer account.

The group of arrows represents a campaign for which a callflow has been created.

 Use the vertical scroll bar to move up and down the structure of accounts until the required customer account is displayed

Or

• Press the first letter of the required customer account to move to that screen of the directory structure.

When the desired customer account is displayed click the plus icon $\textcircled{1}{10}$ next to the account's filing cabinet. Select your campaign and click $\textcircled{10}{10}$ to open the callflow.



Users with permission to design callflows will be presented with the Synthesys main screen. To manually launch a call, click on Start Work under the Agent heading in the Synthesys main screen.



Open with Call Data

If you hold the permission **Screen Pop with Data** you are able to use the **Open with call data** feature in the Agent – Start Work module.

The *Open with call data* option enables you to manually search for and open a record by entering DDI (Direct Dial In), CLI (Caller Line Identification) or Customer ID details, rather than the record being presented by the dialler.

- Select the *Open with call data* feature to search for and open a customer record by entering DDI (Direct Dial In), CLI (Caller Line Identification) or Customer ID details.
- Absence of the *Screen Pop with Data* permission will disable the *Open with call data* feature.

a) 🖬 🕫		Unë	led - Syntheoya		- 8 X
-	leip				944 · Z 🕖
泸 Open	1 🎱 🏹 🍓	e Search	A Modely	A Hote Call	Park @Resthedule
Open with call data	Tracker Adlion	Detail Custor	S Notes Customer R	Get Net, Call Fectord Dary Totophany	
Print +					
X Est	100%	Open califlow		× 3	4 b
Yotal Cala: 4	6 6 F	DDI/DNIS	111111		68 US
BectroCB Cells: 2		CLI/ANI			Construction of the Constr
Loanapplication Calls: 1 EvittLifts Calls: 1		Customer ID	TIEREP_1		and the second s
ide Time Nap fave 1	Nesiew Tote Task Toxe	ОК	Ca	ncel	
	1				
*[
Death				Cal.	Art of Farmer (10-00) Tanks A

The same the		A Carlos A Carlos Carlo	
Take Date	Gatan	Telephone	
, my name is Jo			
and a			
Customer ID	000.0		
Name	Treest		
Title	Mrs.		
Firsthame	femore .		
Surname	Try		
Work	07764690128		
Address			
Linet	12 West Way	- Pr	
Line2	Ratterora		
Line3			
Line4			
Lines	Rondon		
Lines			
PostCade	SWII		
	07811352994		
Autolia			