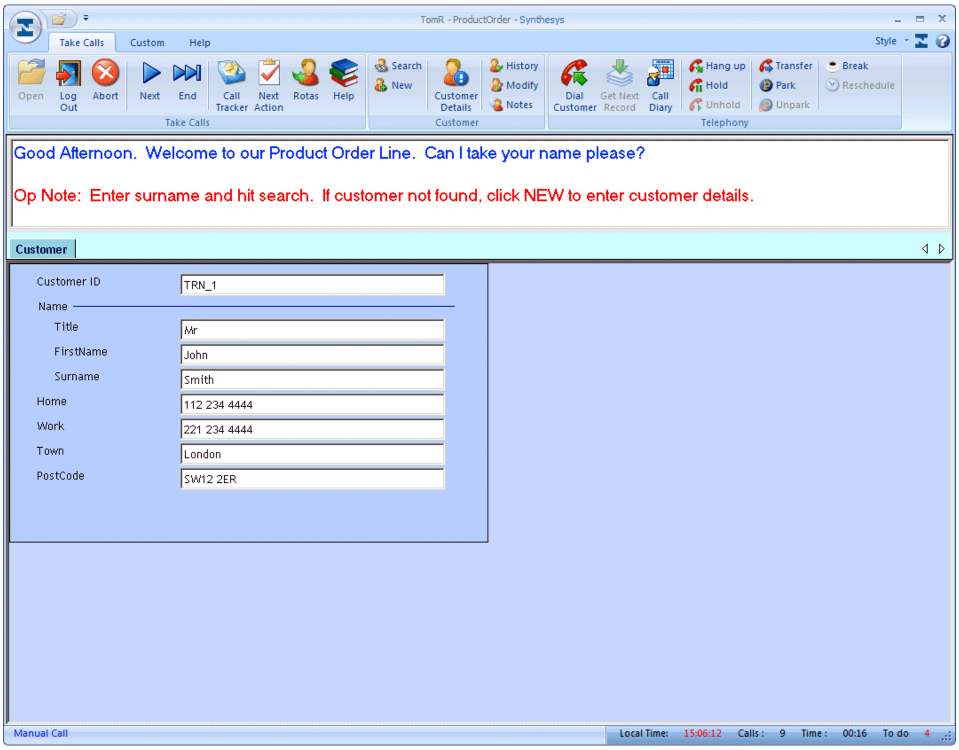
AGENT VIEW

Taking calls



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

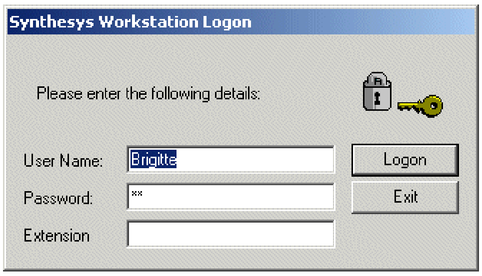
STARTING THE AGENT WORKSTATION

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.



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

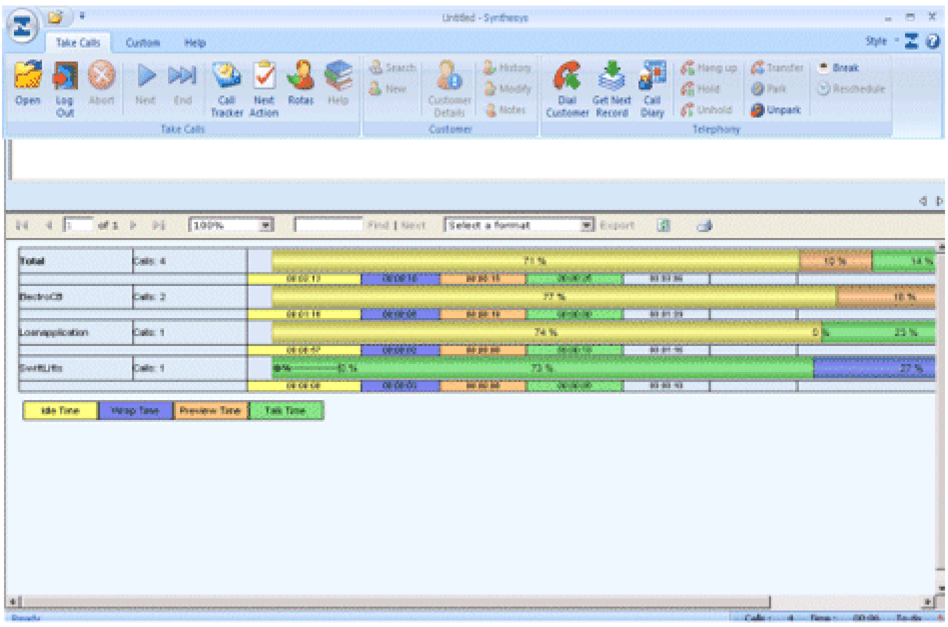
Having logged into Synthesys, the *Agent Start Work* screen is displayed. The appearance of the screen can vary, displaying different toolbar icons, questions, branding images and background colours, reflecting access permissions assigned and branding options selected when designing the callflow in the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



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:

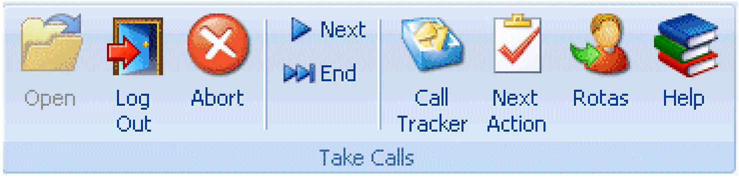
Take Calls	Used to navigate through a callflow
Customer	To access customer details
Telephony.	To perform various telephony tasks

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.
	**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**.

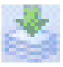
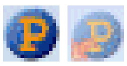
Customer

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.
	**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

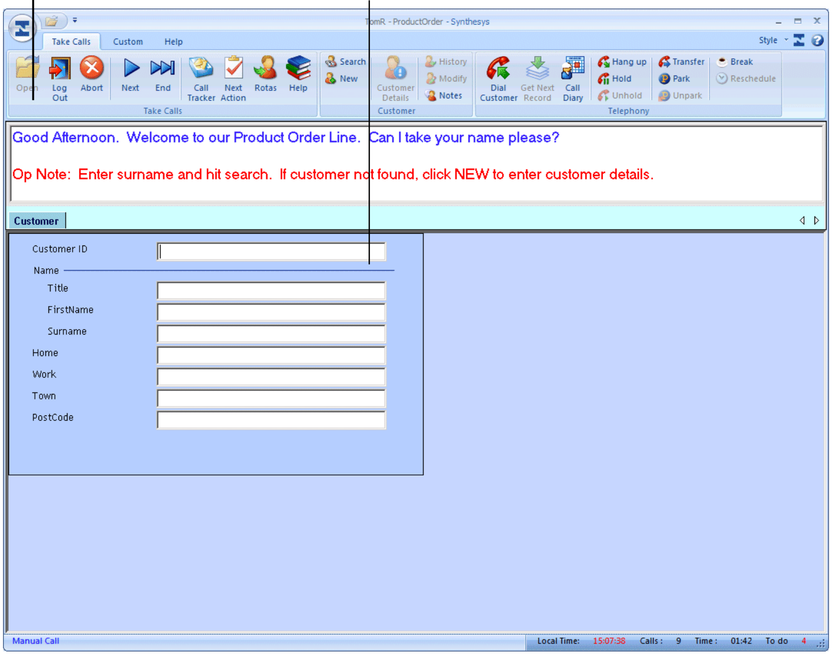
When taking calls, ensure that you log into your phone first, before logging into Synthesys.

- 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.

Question with Agent Prompt Box



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.

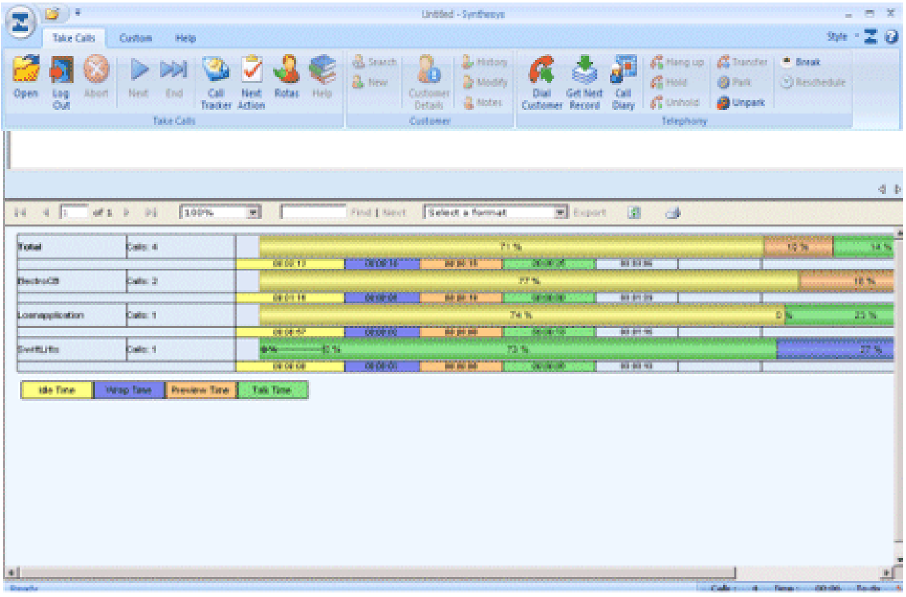
For details about taking a call, see the sections: *Callflow Display Area*, *Using CRM* and *Navigating Through A Call.*

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.

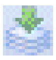
- Ensure that you log into your phone first, before logging into Synthesys.
- Having logged into Synthesys, the *Agent Start Work* main screen is displayed.



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:

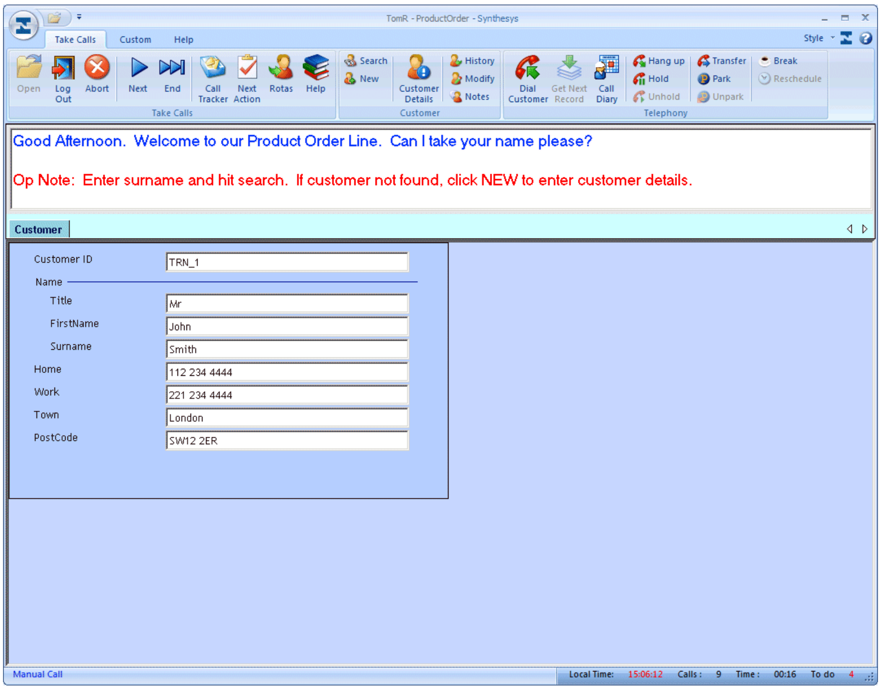
- Click on the ***Get Next Record***  icon on the *Telephony* toolbar
- The CRM will pop, displaying the customer record for the next outbound call.
- Click the ***Dial Customer***  icon on the *Telephony* toolbar.

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.

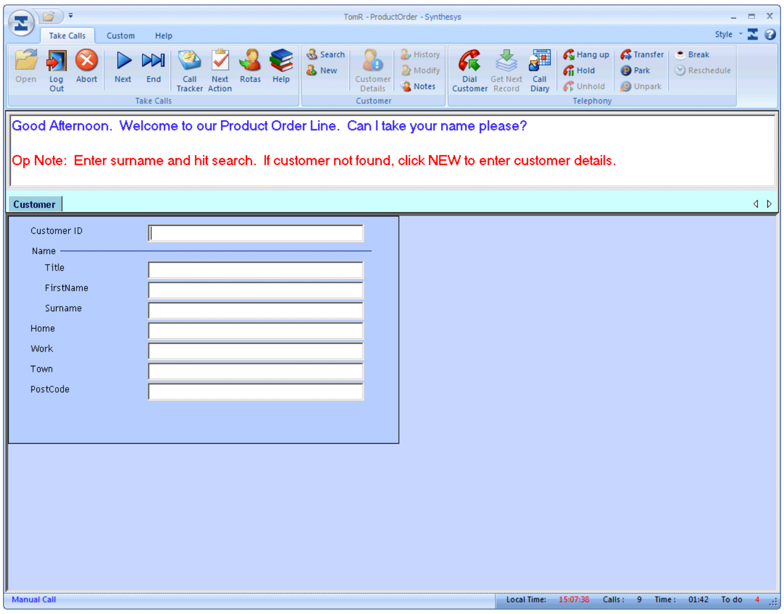


For more information on taking calls see the sections: *Callflow Display Area*, *Using CRM* and *Navigating Through A Call* and also the section: *Preview Outbound Calls*.

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.



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

Icon	**Used To**
	**Search**. Enables the search for existing customer details. Option is usually only enabled in *Inbound* calls.
	**New**. Add a new customer. Option is usually only enabled in *Inbound* calls.
	**Modify**. Allows the modification of existing customer details.
	**Details**. Display customer details.
	**Notes**. View and add information related to a selected customer.
	**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.

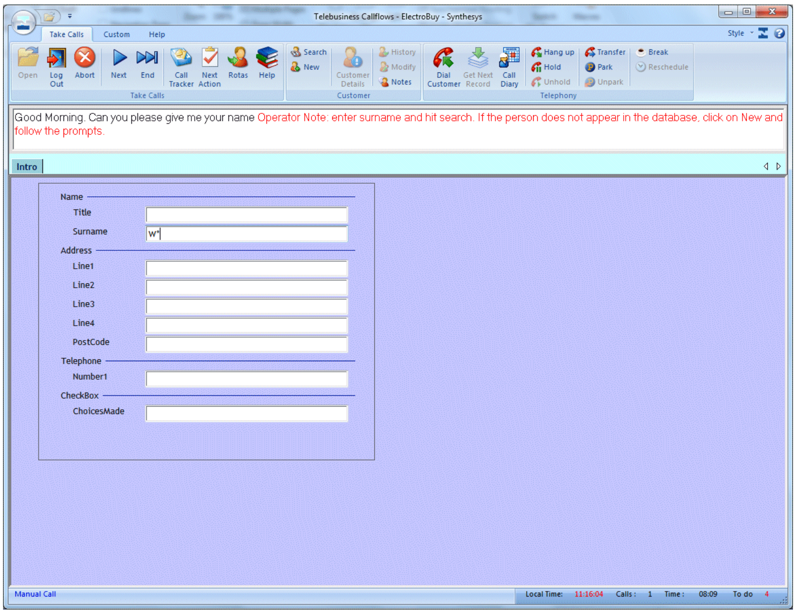
Searching for Customer Details

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:

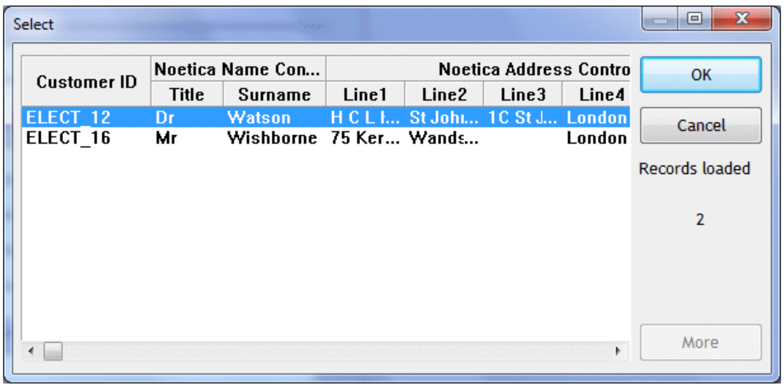
- Enter any known details into the CRM fields displayed, such as a customer reference number, a name or a telephone number, or simply the first letter of the surname in combination with wildcards (*), i.e. W*.

- Click the ***Search***  icon on the *Customer* toolbar. The customer record will subsequently be displayed in the CRM.



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

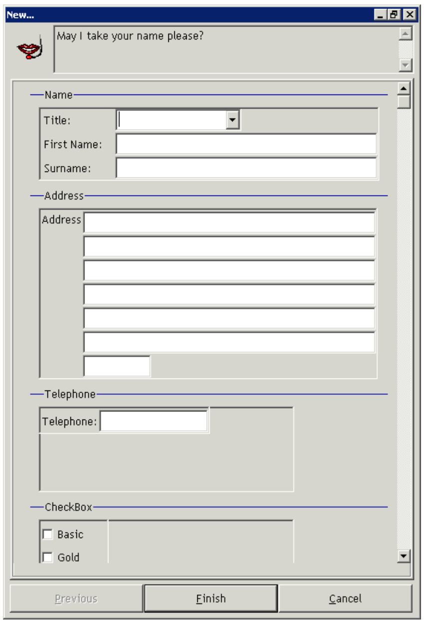
- Select the customer from the list and click OK to display details in the CRM.



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.



- To close the window without saving changes, click *Cancel*.

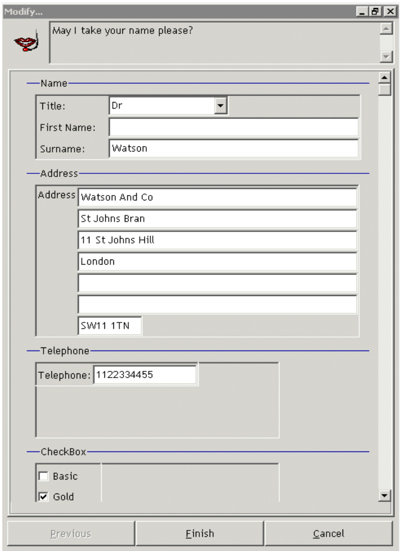
New customer records will only be saved to the database if they are entered into the New window.

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:

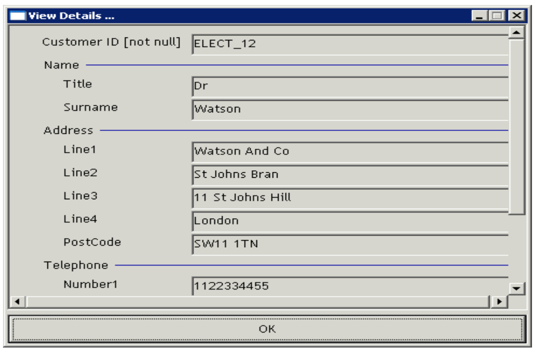
- Click the **Modify**  icon on the *Customer* toolbar.
- In the *Modify* window you can make all necessary changes as required.
- Click *Finish* to save your changes, or *Cancel* to close the window without saving changes.



Viewing Customer Details

To view details associated with an existing customer record:

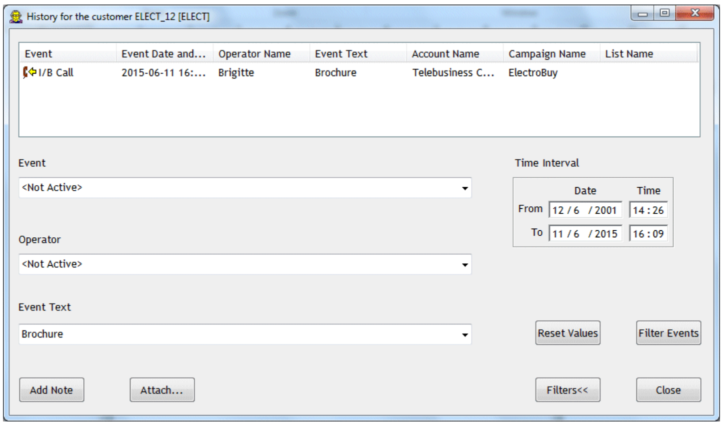
- Click the ***Customer Details***  icon on the *Customer* toolbar.
- In the *View Details* window you can look up information about the selected customer.



Accessing Customer History

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

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



The **'Filter'** button opens access to the *Event, Operator ID* and *Event Text* fields.

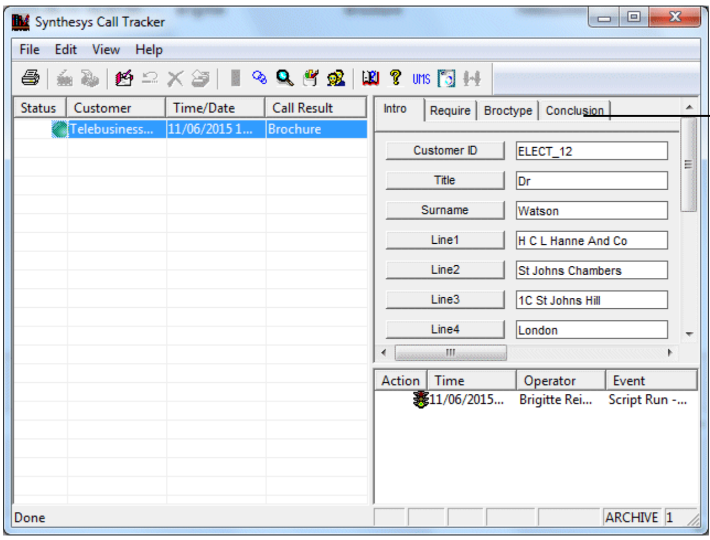
To display all information, click the **Reset Values** tab

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).

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



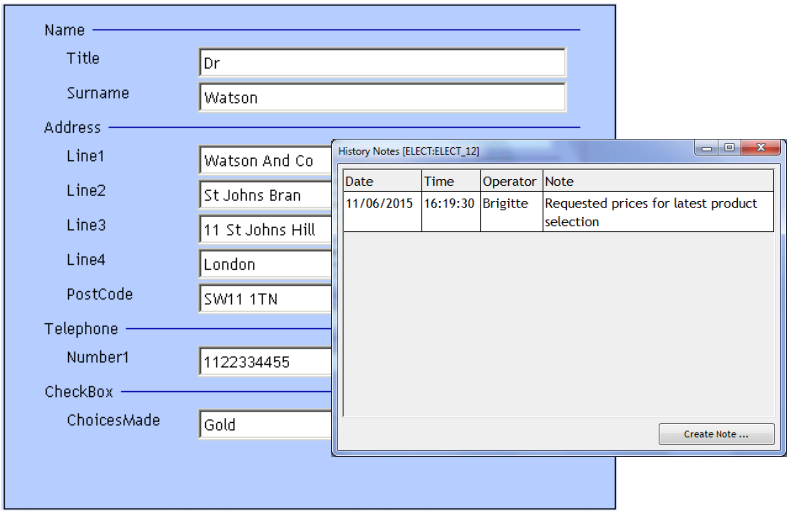
Use tab sections to check all details associated with this call.

Viewing & Adding Notes

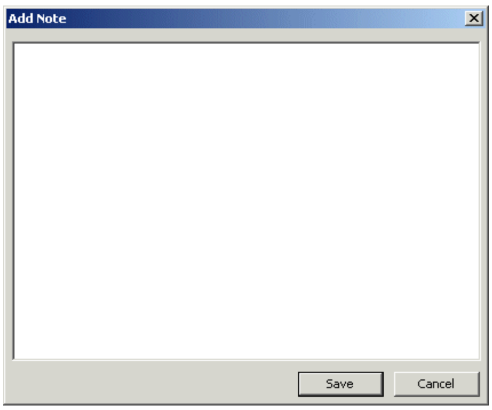
To view or write a note with information associated with the selected customer:

- 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.



- 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.



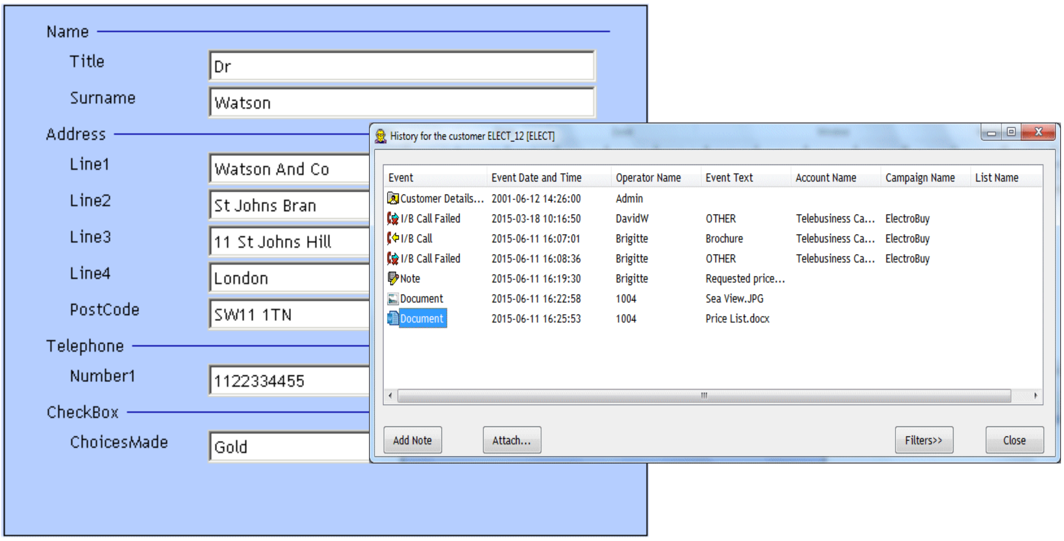
To close the window without saving your entry, click the *Cancel* button.

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.



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.

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:

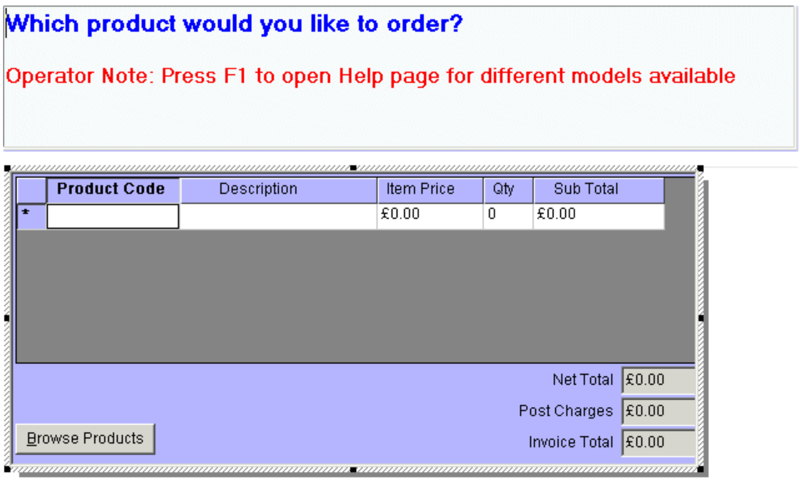
To move forward as far as possible in the callflow to the last screen completed, click on the *End* icon .

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.



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

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.

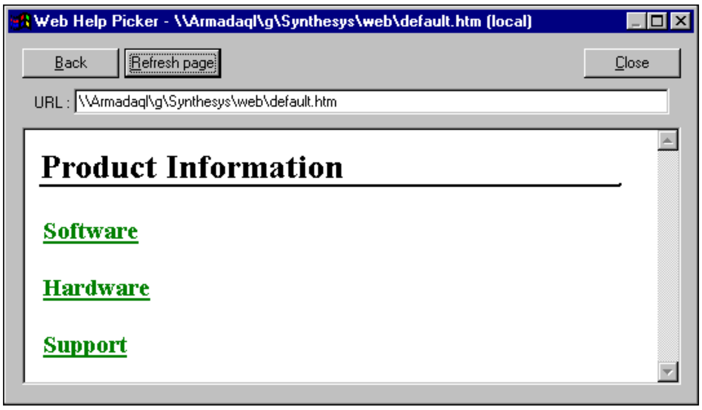
Accessing Web Style Help

To open the *Help Page*

- Press **F1** on the keyboard
- Alternatively, you can click on the ***Help*** icon 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.
- To move back to the previous pages click on Back.



- To close the Help Page, click on Close 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.

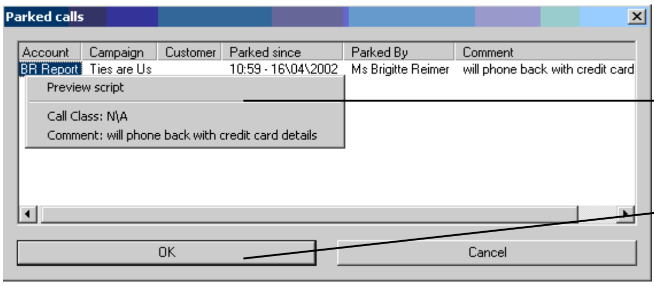
Note: Customers who wish to ***place the voice call On Hold and clear the script*** from the agent's screen, saving the call data collected up to this point on the local workstation (with agent state in the Live Monitor *Previewing*) should contact the Noetica helpdesk.

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.

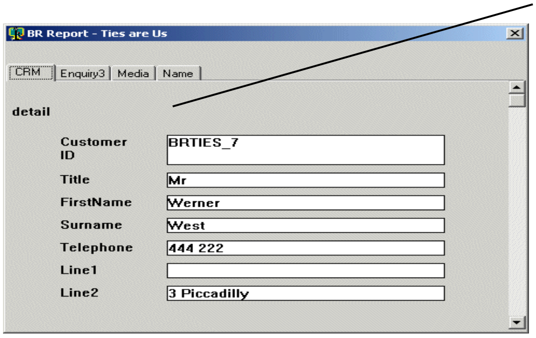
When you retrieve a call the following window will be displayed:



Select **Preview Script**, to view the content of a parked or held call.

Click OK to retrieve the call.

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.

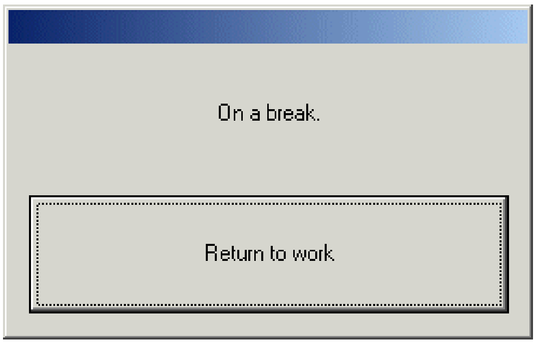


The retrieved call will open at the point at which it was parked or put on hold, still containing the previously collected call information.

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 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.

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

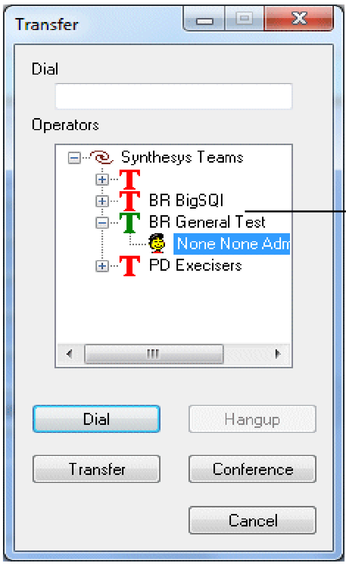
Call Transfers

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*** 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.



To transfer the caller without the callflow data to persons not connected to Synthesys, enter a telephone number into the *Dial* field.

To place a <u>voice and data</u> consultation/ transfer call, select the relevant person in the *Operators* window.

Dial Put the original caller on hold and dial the number displayed.

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.

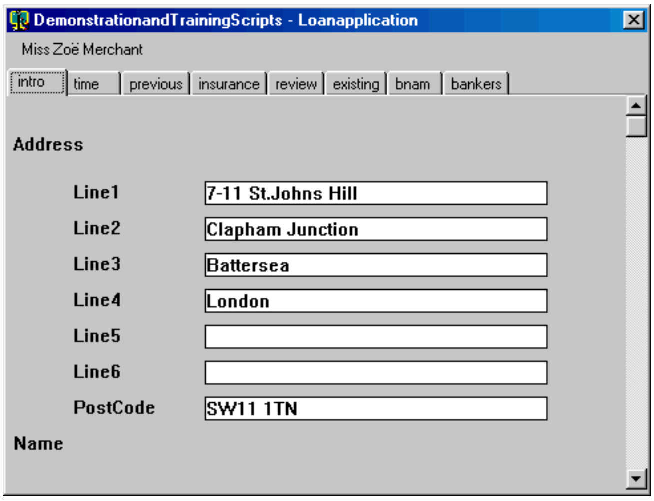
Cancel Close the Transfer window, without taking any action.

Viewing a Consultation or Transferred Call

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

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.



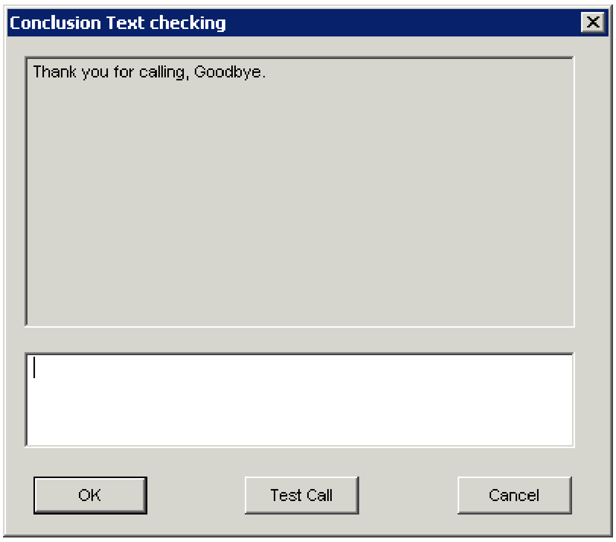
- Click **Hangup,** when the consultation is completed to continue handling the call. Press *Enter* on the keyboard, to move to the next screen.
- Click **Transfer**, to transfer the customer and call information to the supervisor, if the supervisor wishes to take over and finish the call.

Finishing a Call

To finish a call you must 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.

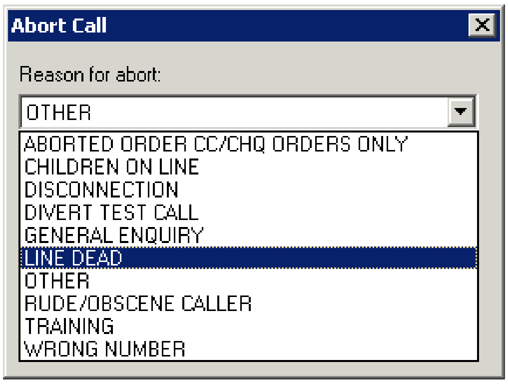


Aborting Inbound Calls

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



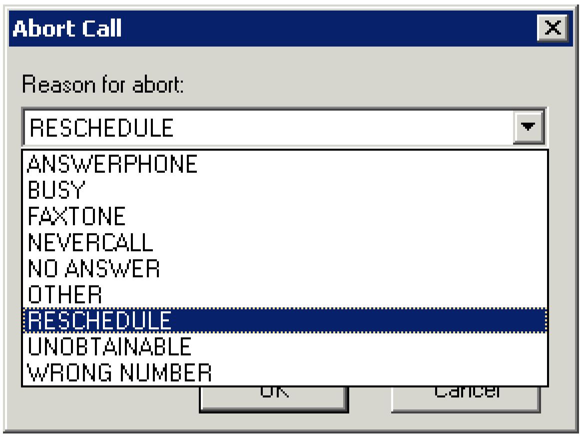
A report can be produced on every call completed, including aborted calls, outlining the reasons for terminating each call.

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.



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 ½ 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.

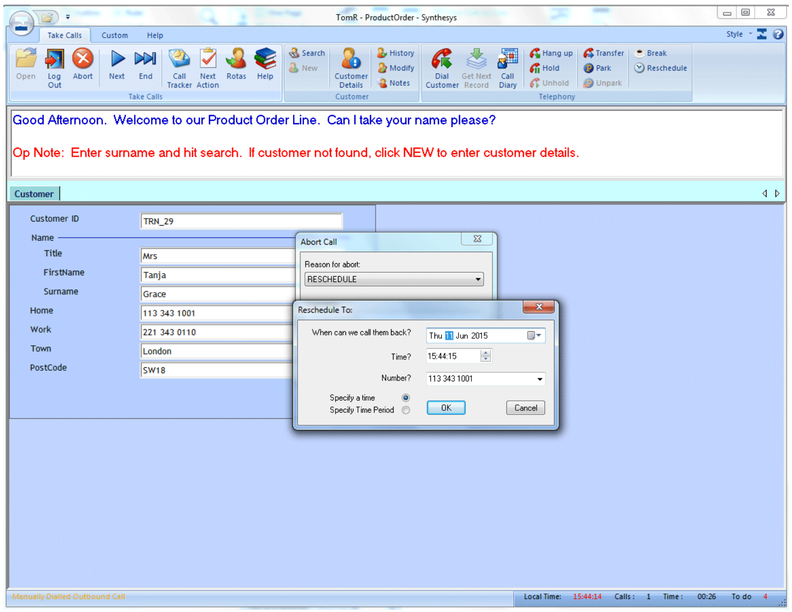
Please see next page for information about ***Rescheduling*** calls.

Rescheduling Calls

To abort and arrange a callback:

- Click on the Reschedule  icon on the Telephony toolbar.

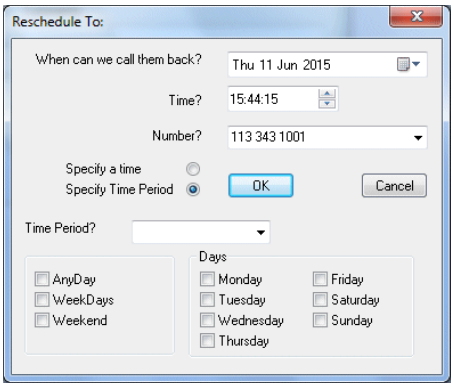
The ***Reschedule To*** dialog, depending on the set-up, either simply displays the last number dialled or allows you to select or enter a number for the callback.



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.



Special Reschedule Call

Using the Special Reschedule 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 re-enter information.

Information from specially rescheduled calls is stored in the Special Reschedule folder in the TRANSACTION FILE. The information is NOT stored in the database and CAN'T 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.

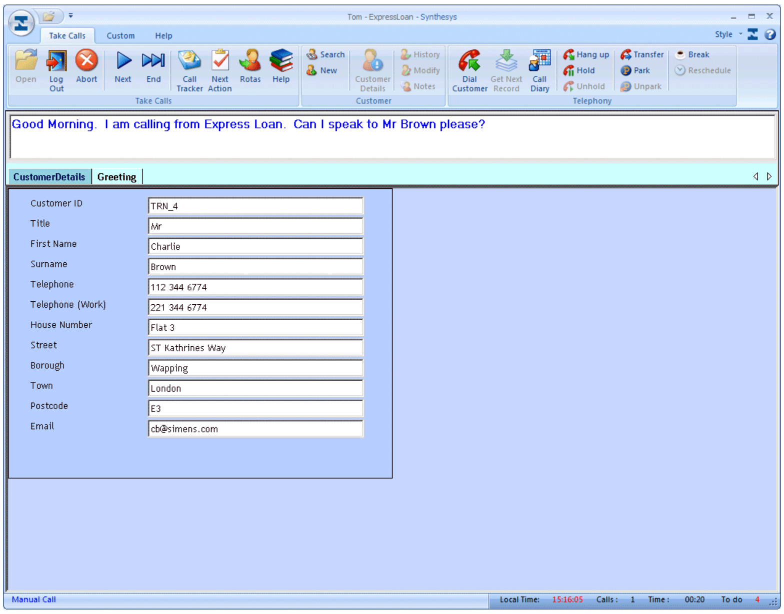
Predictive calls will automatically hang up as soon as you click OK in the conclusion window of the callflow.

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***  icon on the *Take Calls* toolbar

Or

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



The call that you are currently on will remain open.

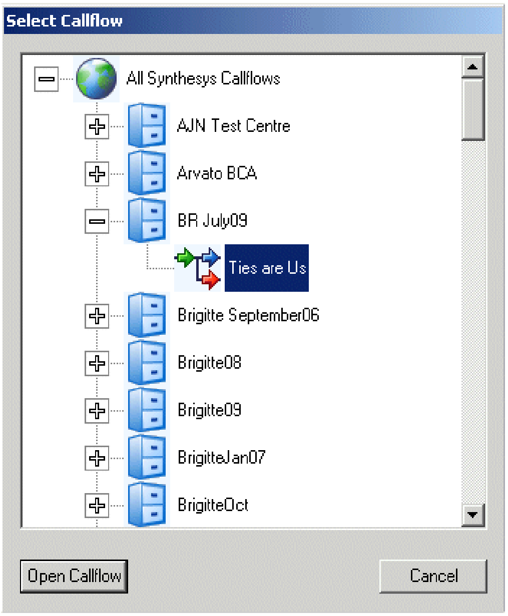
- Finished the call in the normal way, before you will be logged out.

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 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 next to the account's filing cabinet. Select your campaign and click OK 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 p*ermission* ***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.