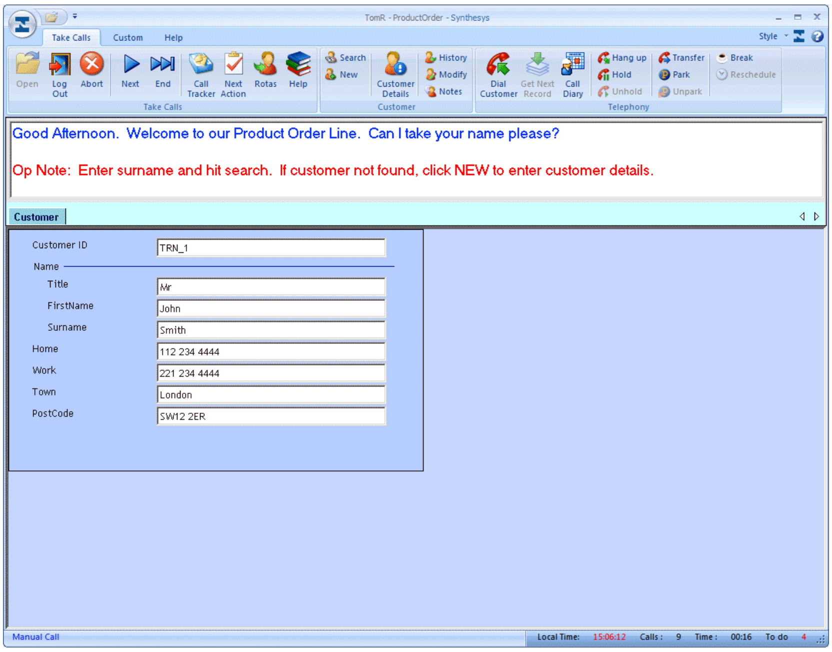
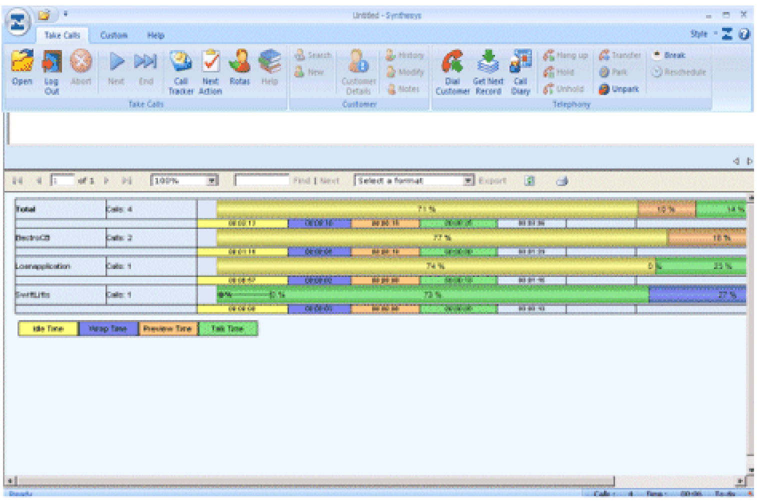
AGENT VIEW

Start Work



Agent Dashboard with Call Statistics



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AGENT VIEW

Noetica

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.

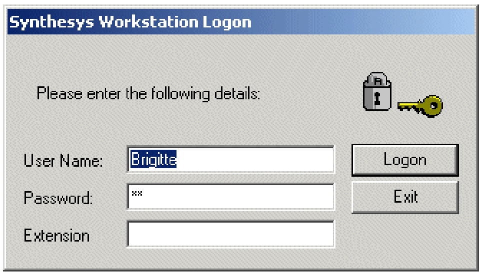
STARTING THE AGENT WORKSTATION

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**.

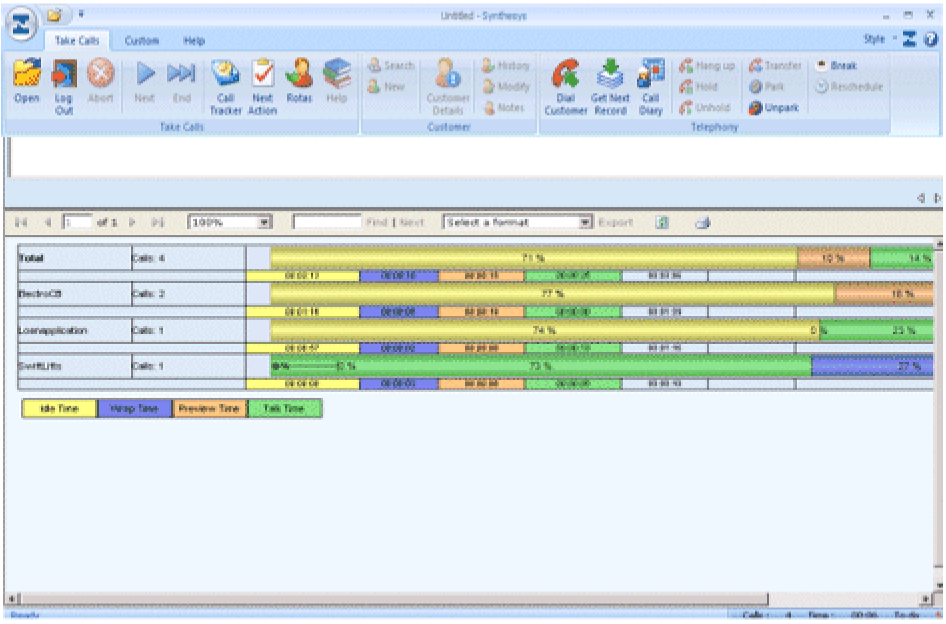
AGENT START WORK SCREEN

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:

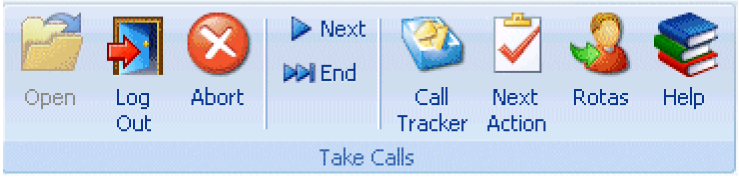
Take Calls	Used to navigate through a callflow
Customer	To access customer details
Telephony.	To perform various telephony tasks

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**.

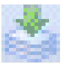
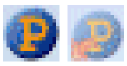
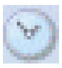
Customer

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

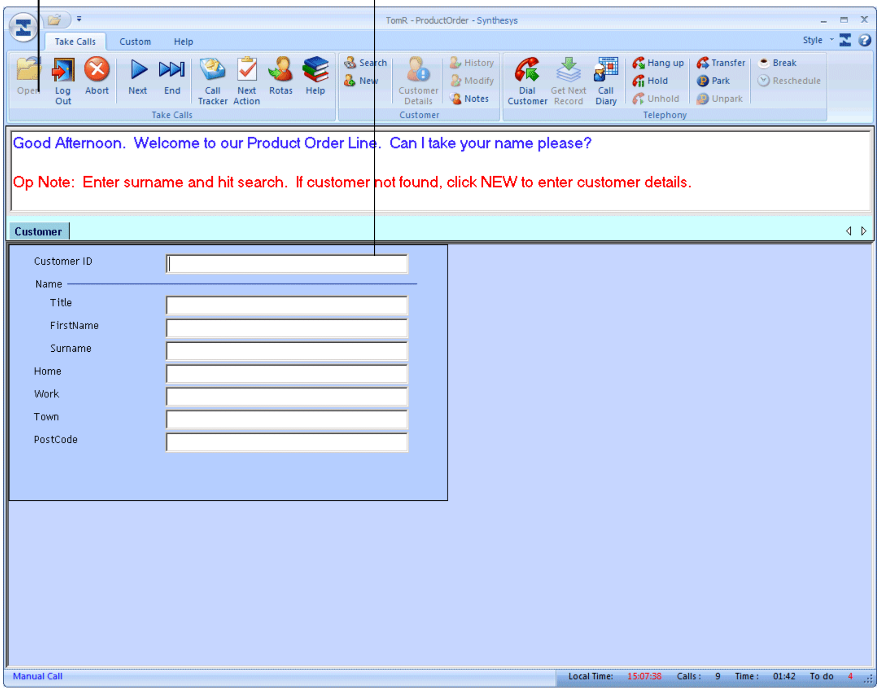
When taking calls, ensure that you log into your phone first, before logging into Synthesys.

- 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.

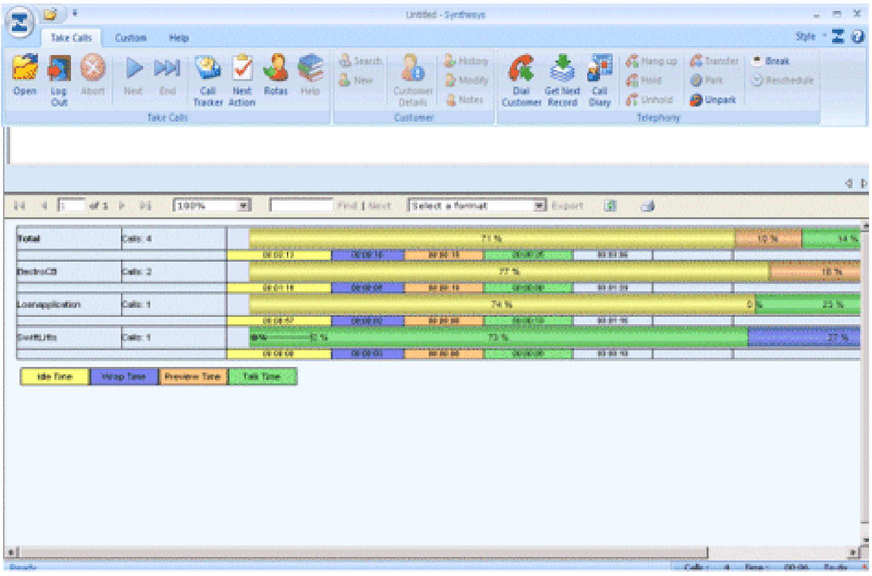
For details about taking a call, see the sections: *Callflow Display Area*, *Using CRM* and *Navigating Through A Call.*

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.

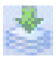
- Ensure that you log into your phone first, before logging into Synthesys.
- Having logged into Synthesys, the *Agent Start Work* main screen is displayed.



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:

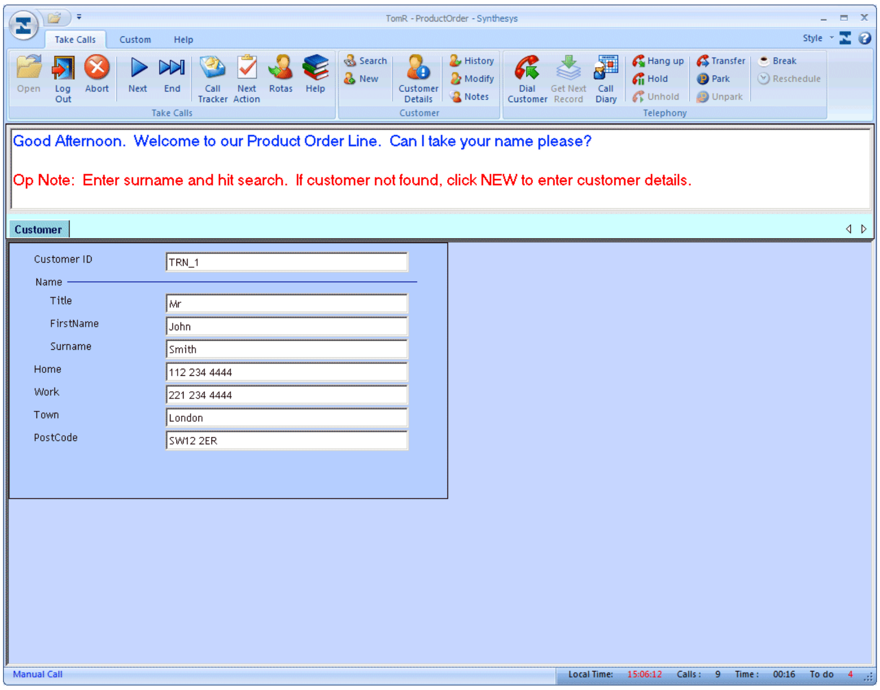
- Click on the ***Get Next Record***  icon on the *Telephony* toolbar
- The CRM will pop, displaying the customer record for the next outbound call.
- Click the ***Dial Customer***  icon on the *Telephony* toolbar.

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.

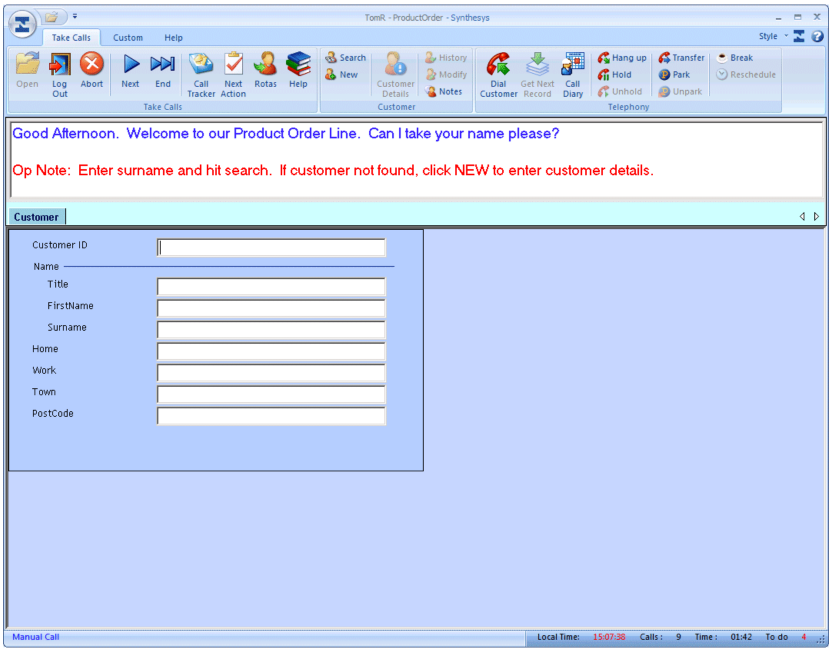


For more information on taking calls see the sections: *Callflow Display Area*, *Using CRM* and *Navigating Through A Call* and also the section: *Preview Outbound Calls*.

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.

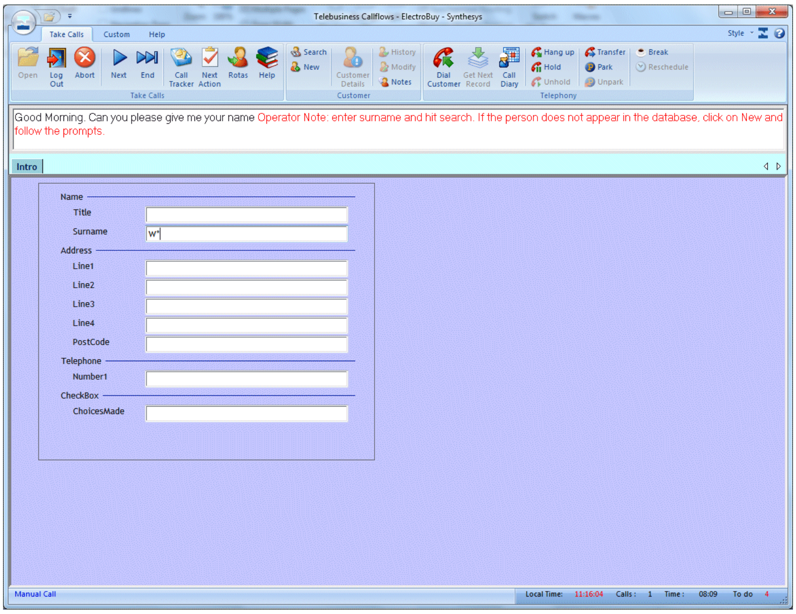
Searching for Customer Details

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:

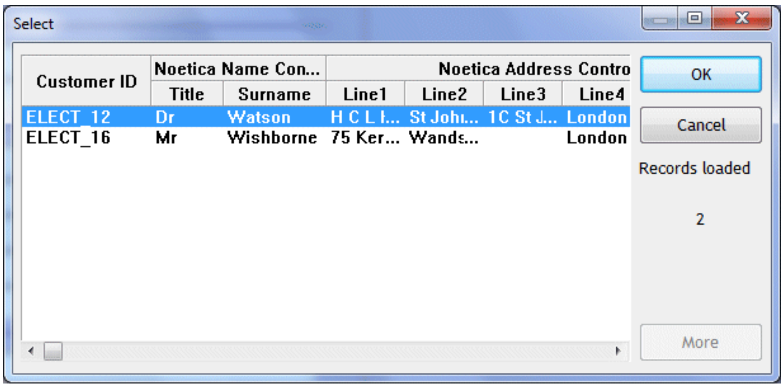
- Enter any known details into the CRM fields displayed, such as a customer reference number, a name or a telephone number, or simply the first letter of the surname in combination with wildcards (*), i.e. W*.

- 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.

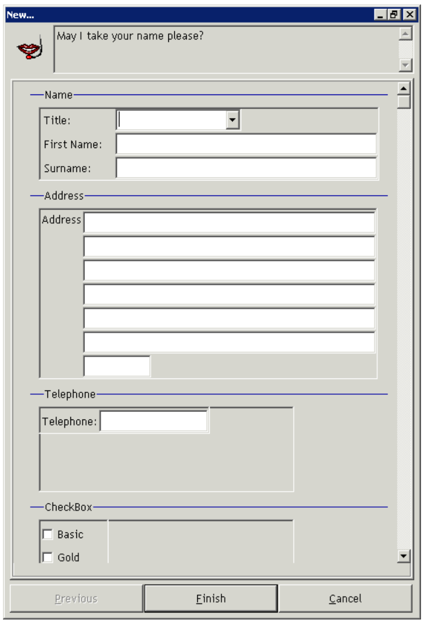
- Select the customer from the list and click OK to display details in the CRM.



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*.

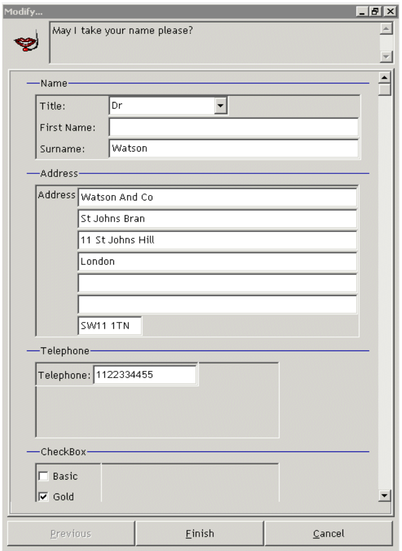
*New customer records will only be saved to the database if they are entered into the **New** window.*

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:

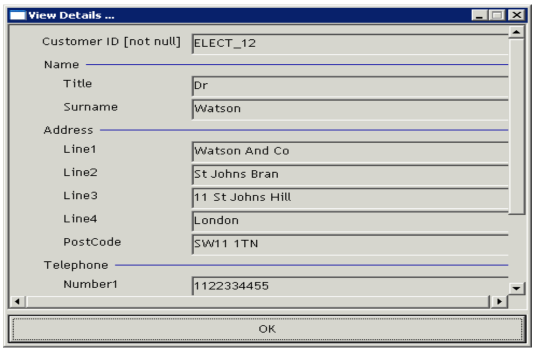
- Click the **Modify** icon on the *Customer* toolbar.
- In the *Modify* window you can make all necessary changes as required.
- Click *Finish* to save your changes, or *Cancel* to close the window without saving changes.



Viewing Customer Details

To view details associated with an existing customer record:

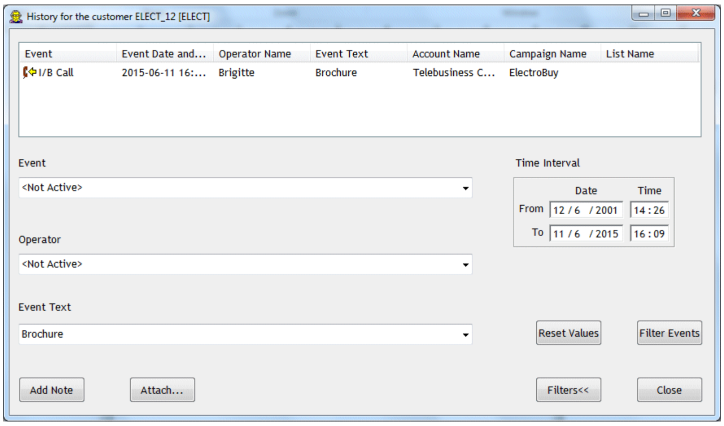
- Click the ***Customer Details*** icon on the *Customer* toolbar.
- In the *View Details* window you can look up information about the selected customer.



Accessing Customer History

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

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



The **‘Filters’** button opens access to the *Event, Operator ID* and *Event Text* fields.

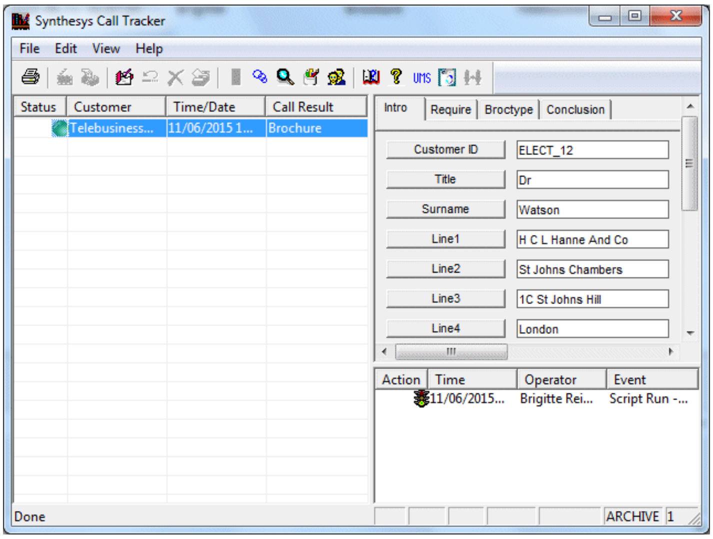
To display all information, click the **Reset Values** tab

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.



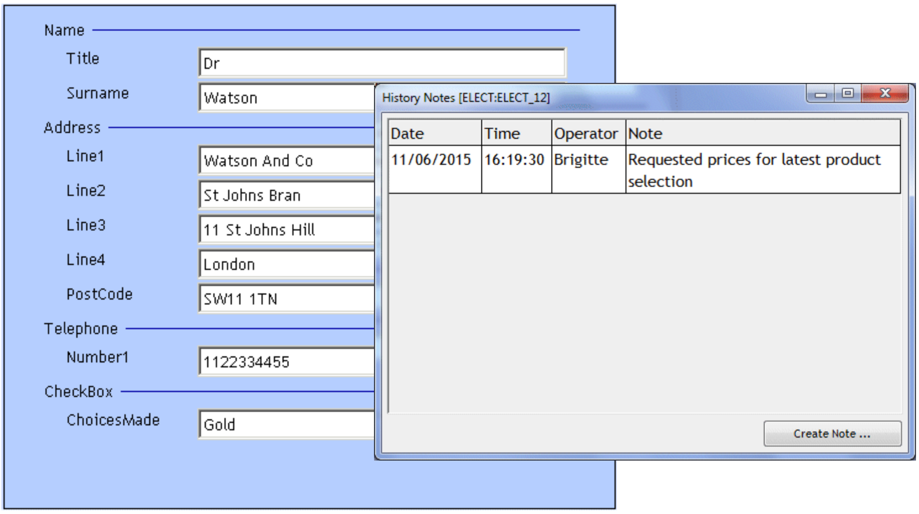
Use tab sections to check all details associated with this call.

Viewing & Adding Notes

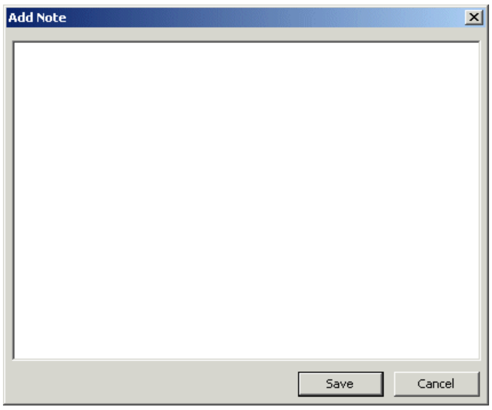
To view or write a note with information associated with the selected customer:

- 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.



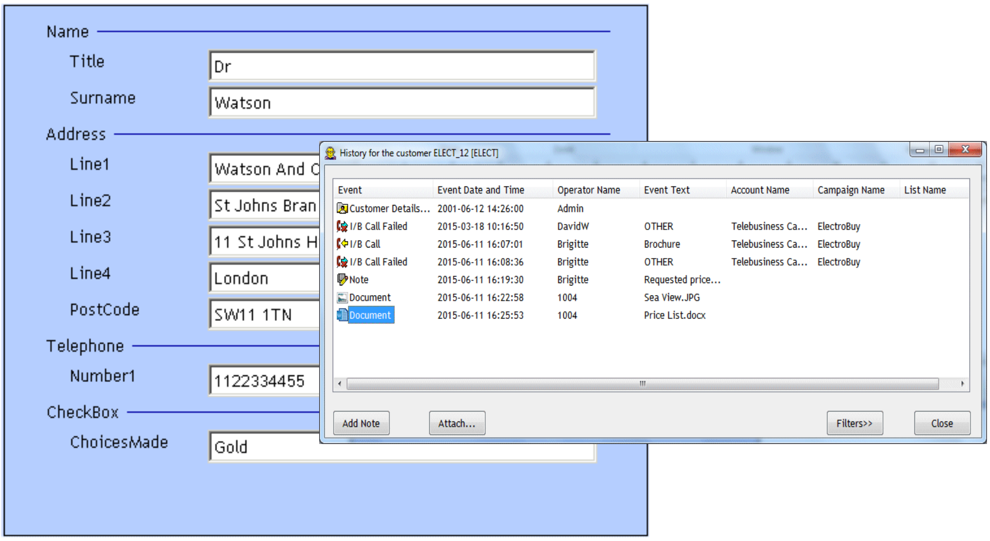
To close the window without saving your entry, click the *Cancel* button.

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:

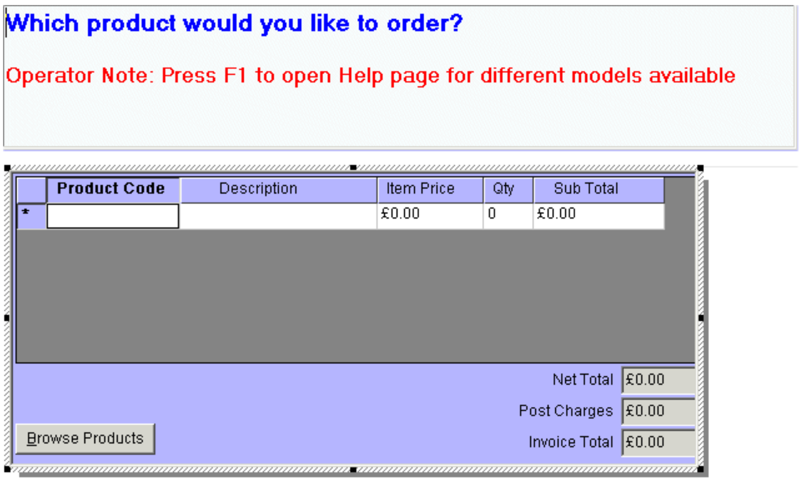
To move forward as far as possible in the callflow to the last screen completed, click on the *End* icon .

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.

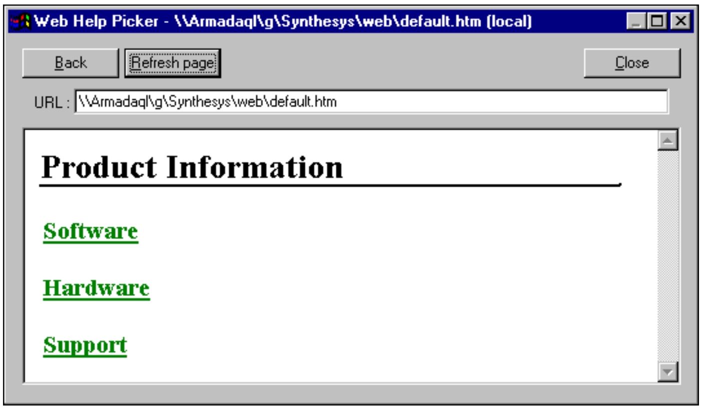
Accessing Web Style Help

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**.**

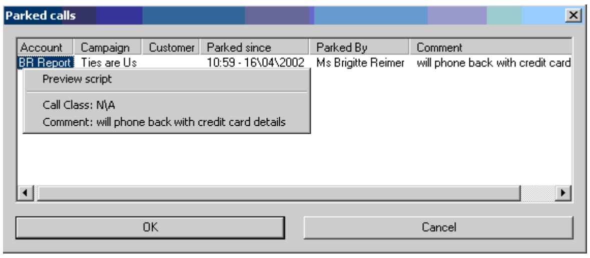
Note: Customers that wish to place the voice ***call On Hold and clear*** the script from the agent's screen, saving the call data collected up to this point (with agent state in the Live Monitor *Previewing*) should contact the Noetica helpdesk

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

Park. To park the call, saving the call data collected up to this point, and to allow other agents within the call centre to unpark and access the information of the call.

Unpark. To retrieve parked calls.

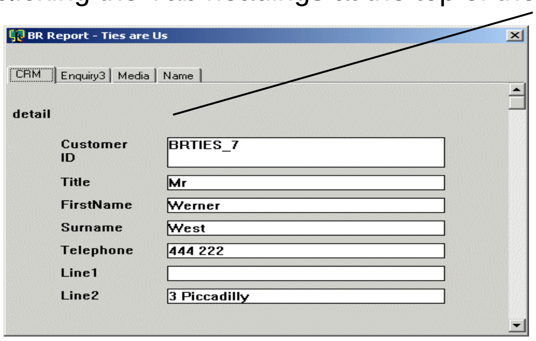
When you retrieve a call the following window will be displayed:



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.

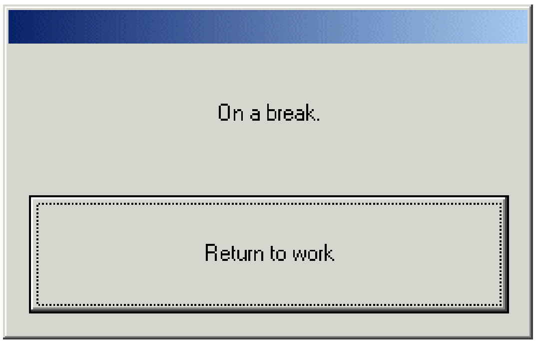


The retrieved call will open at the point at which it was parked or put on hold, still containing the previously collected call information.

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.

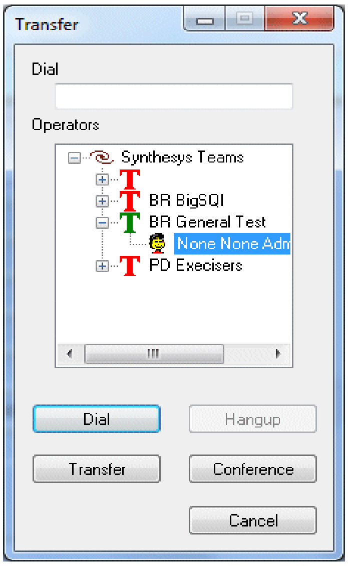
Call Transfers

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 voice and data consultation/ transfer call, select the relevant person in the *Operators* window.

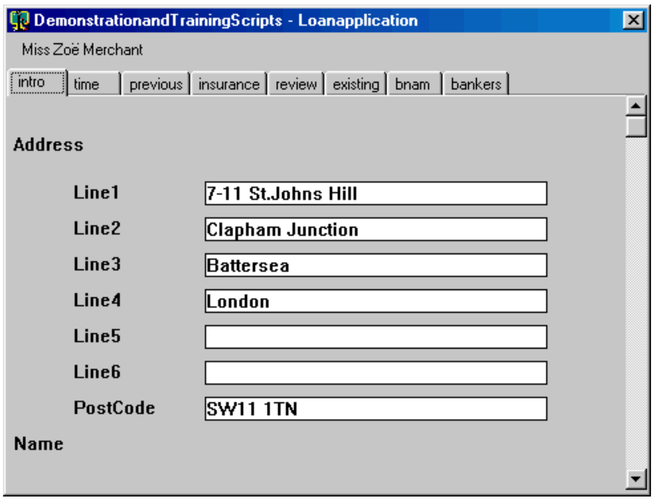
Dial	Put the original caller on hold and dial the number displayed.
Hangup	Hang up the call, for example, if the dialled number is not answered. This will get the original caller back on line.
Transfer	Transfer the caller to the number displayed.
Conference	Dial a conference call/ (warm transfer) to 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.



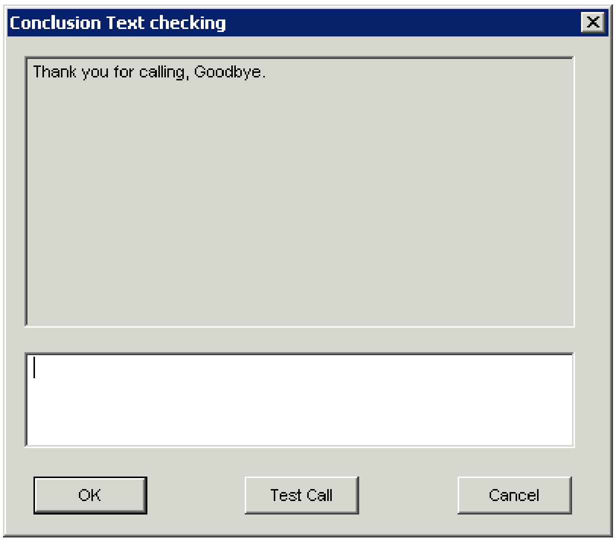
- Click **Hangup,** when the consultation is completed to continue handling the call. Press *Enter* on the keyboard, to move to the next screen.
- Click **Transfer**, to transfer the customer and call information to the supervisor, if the supervisor wishes to take over and finish the call.

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.

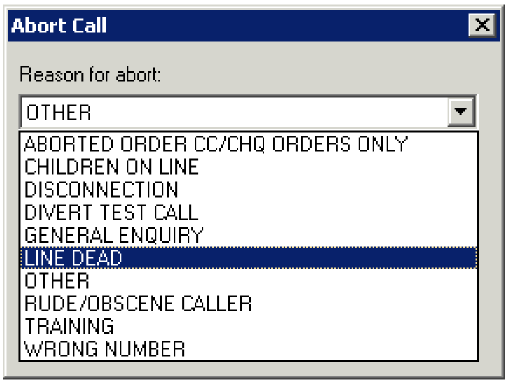


Aborting Inbound Calls

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.



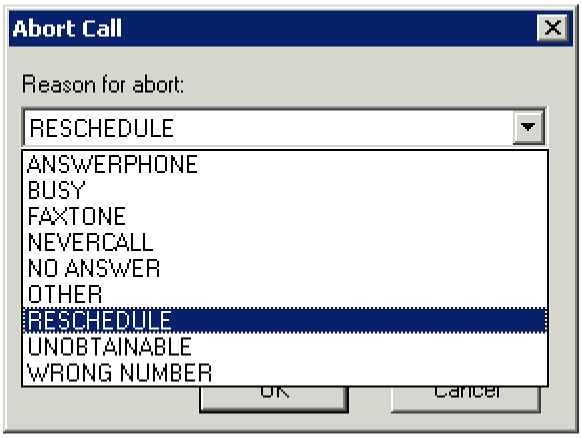
A report can be produced on every call completed, including aborted calls, outlining the reasons for terminating each call.

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.

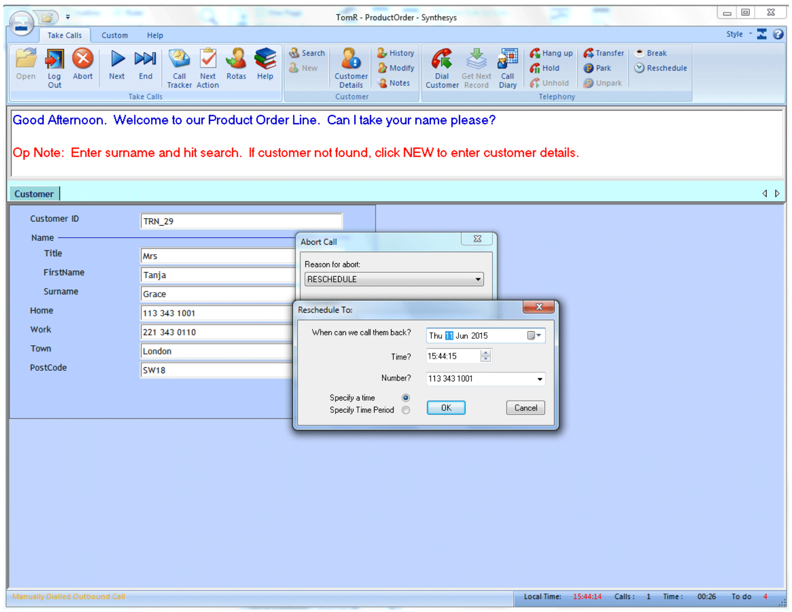
Please see next page for information about ***Rescheduling*** calls.

Rescheduling Calls

To abort and arrange a callback:

- Click on the Reschedule  icon on the Telephony toolbar.

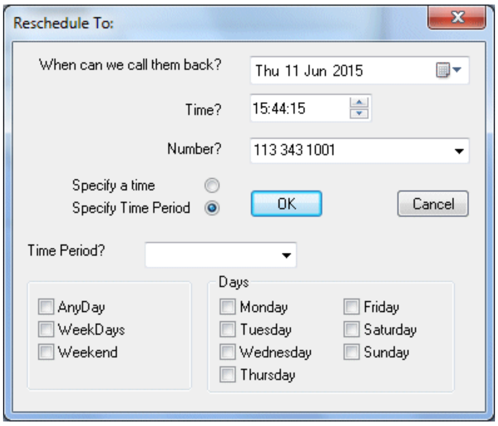
The ***Reschedule To*** dialog, depending on the set-up, either simply displays the last number dialled or allows you to select or enter a number for the callback.



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 <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.

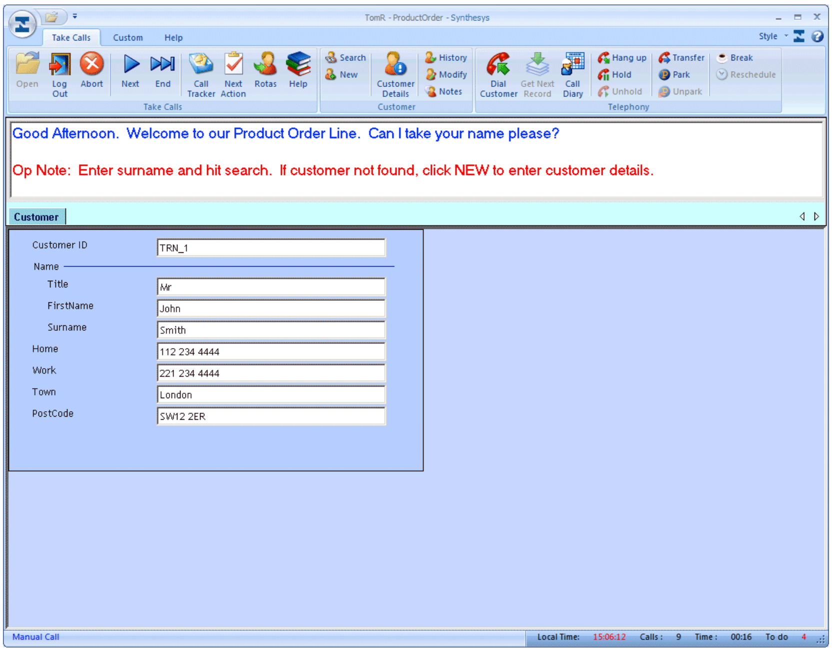
Predictive calls will automatically hang up as soon as you click OK in the conclusion window of the callflow.

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***  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.

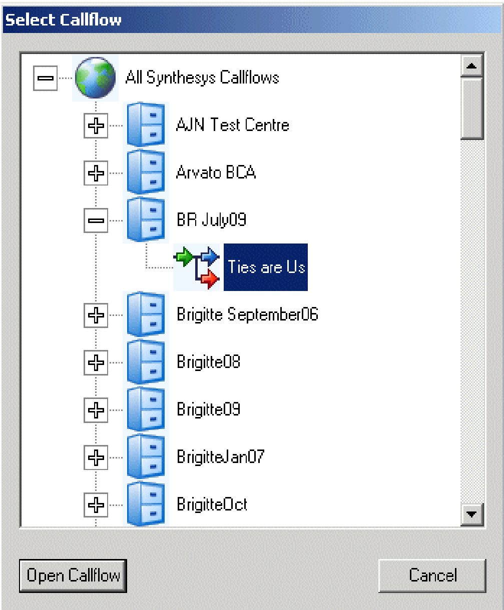
- Finished the call in the normal way, before you will be logged out.

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.

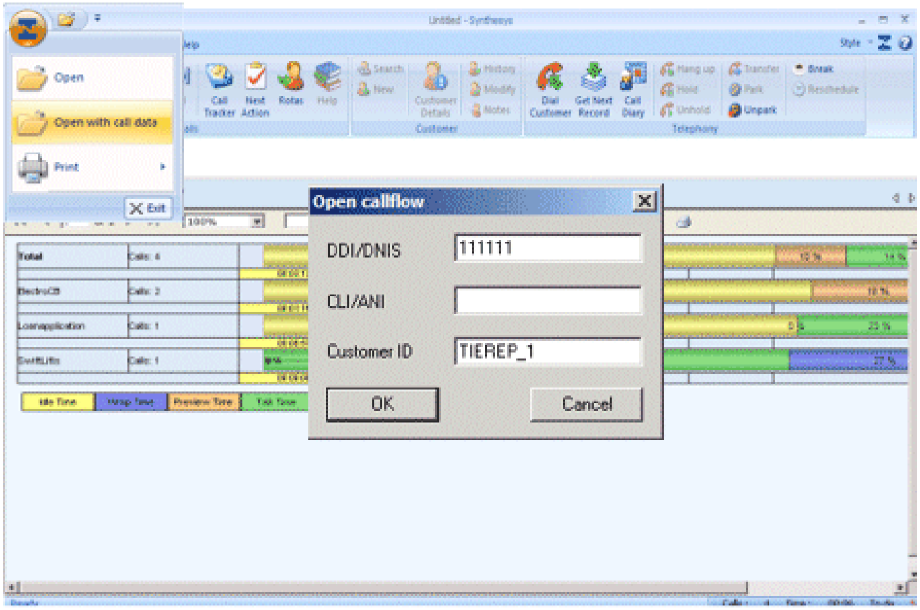
*Users with permission to design callflows will be presented with the Synthesys main screen. To manually launch a call, click on **Start Work** under the **Agent** heading in the Synthesys main screen.*

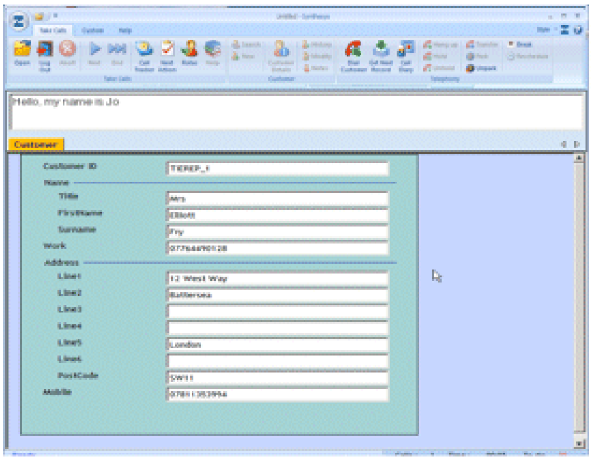
Open with Call Data

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

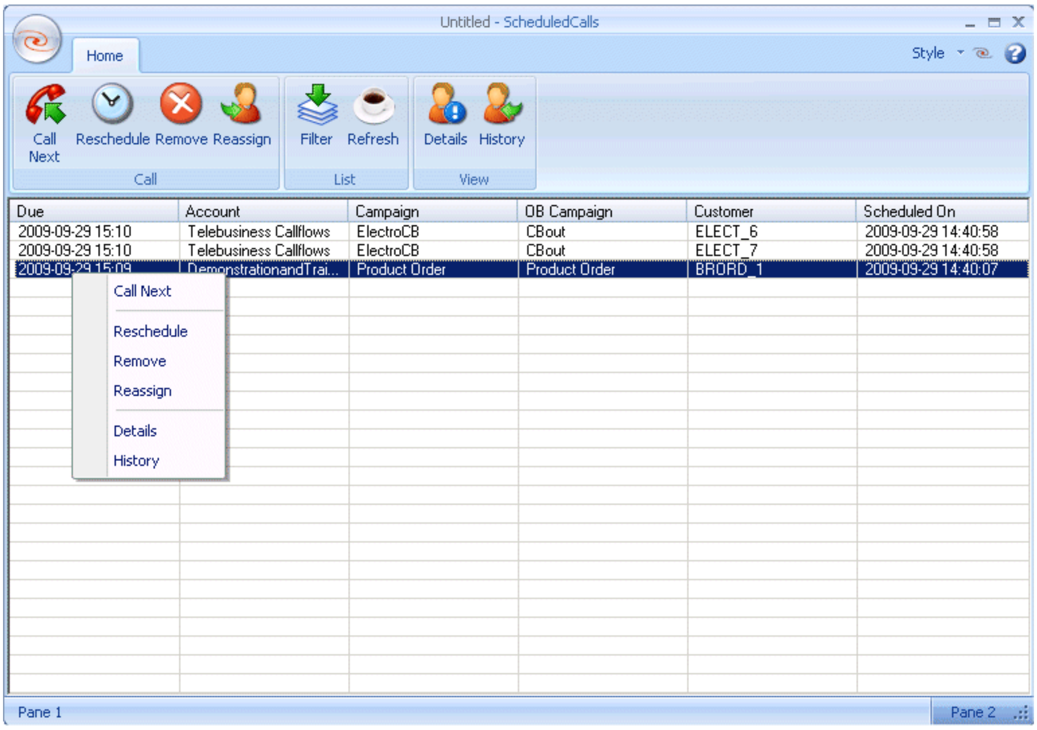
The *Open with call data* option enables you to manually search for and open a record by entering DDI (Direct Dial In), CLI (Caller Line Identification) or Customer ID details, rather than the record being presented by the dialler.

- 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.





Call Diary


Untitled - ScheduledCalls
Home
Style
Call Next
Reschedule
Remove
Reassign
Call
Filter
Refresh
List
Details
History
View
Due
Account
Campaign
OB 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
Product Order
Product Order
BRORD_1
2009-09-29 14:40:07
Call Next
Reschedule
Remove
Reassign
Details
History
Pane 1
Pane 2

THE CALL DIARY

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

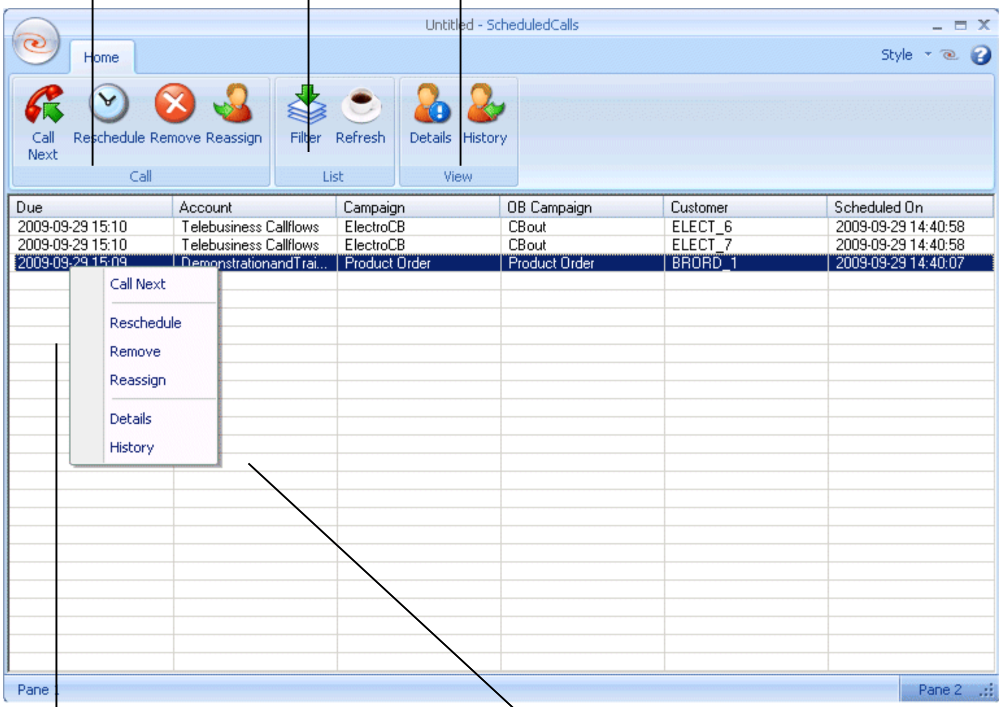
View customer details and history events associated with the selected call

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



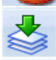
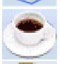
Rescheduled calls due for agent Option menu for manipulating rescheduled calls

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.

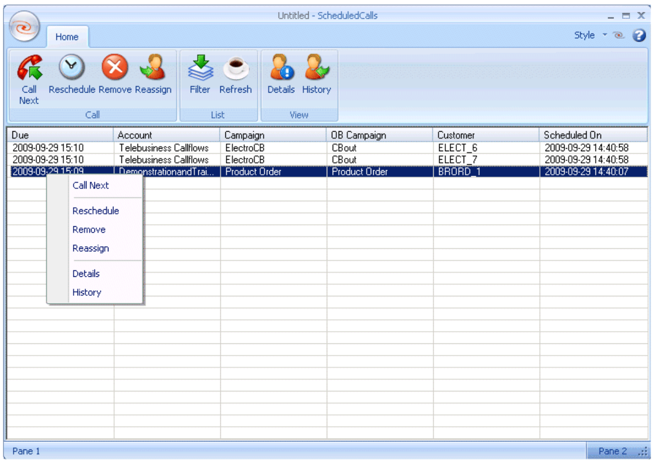
Call Next

To pick up and handle a reschedule call immediately:

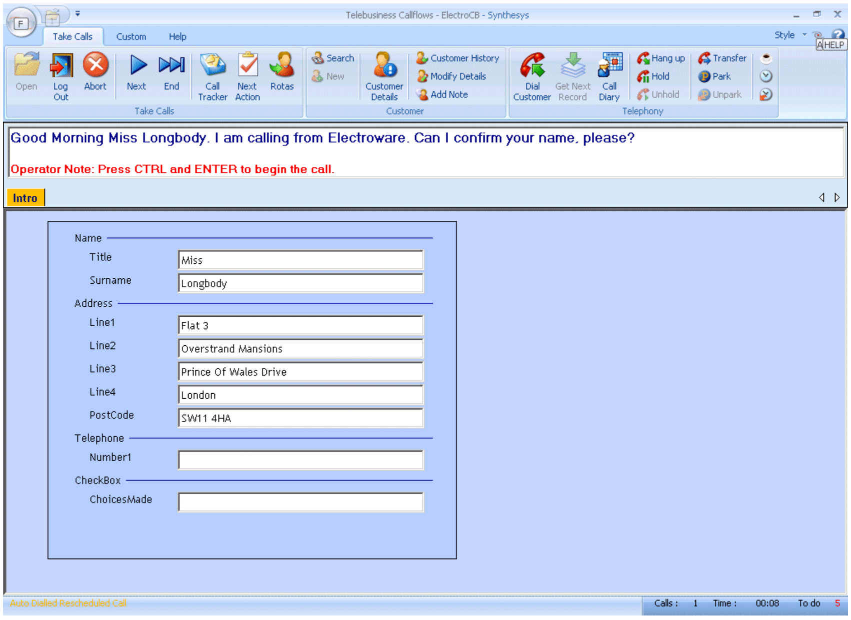
- Click the ***Call Next***  icon

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.



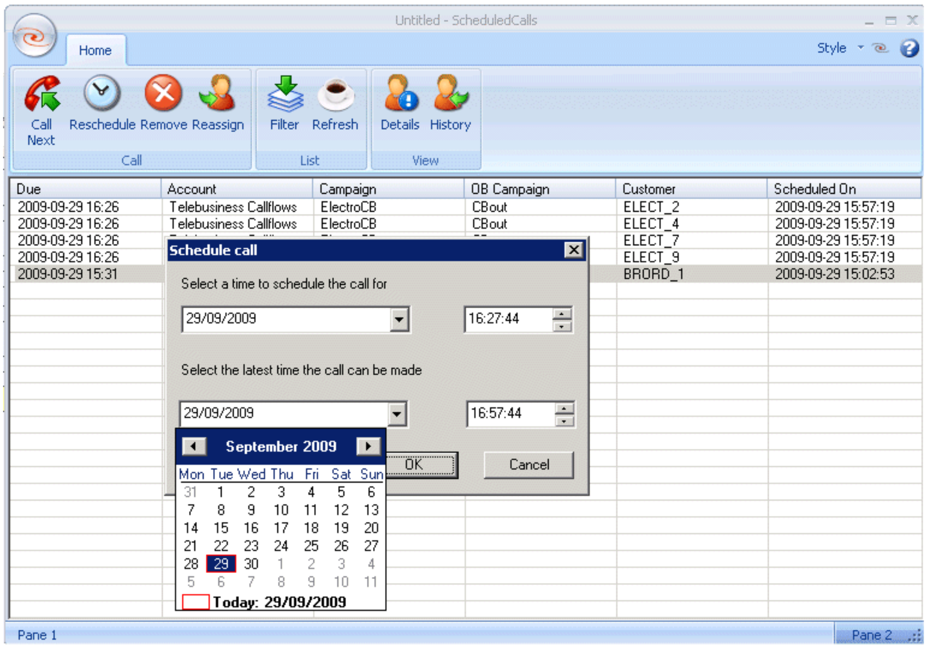
Reschedule

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.



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.

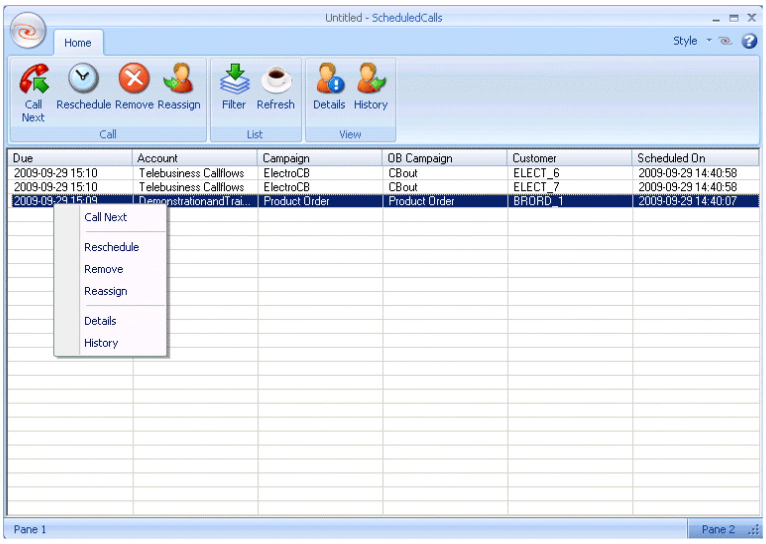
Remove

To remove selected calls from the outbound call list:

- Click the ***Remove***  icon

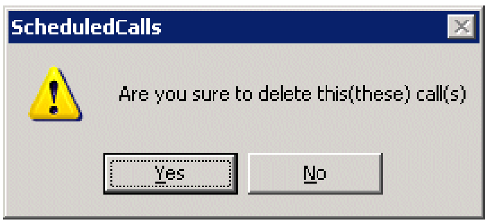
Or

- 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.

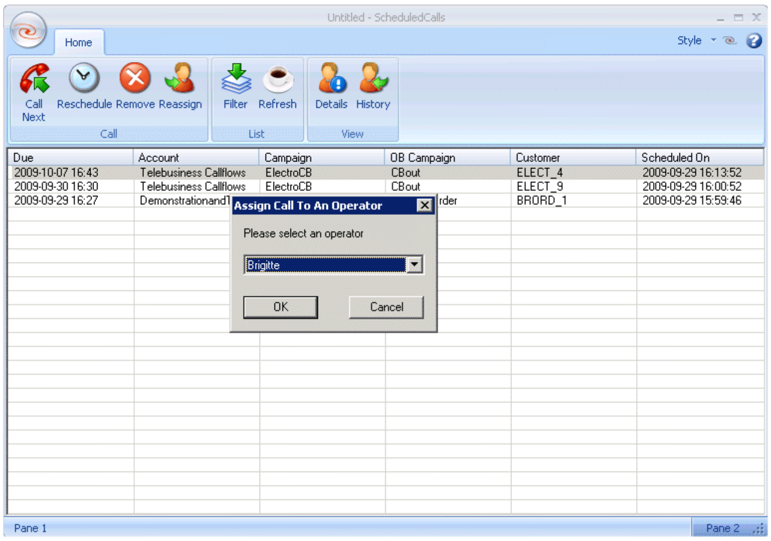
Reassign

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:

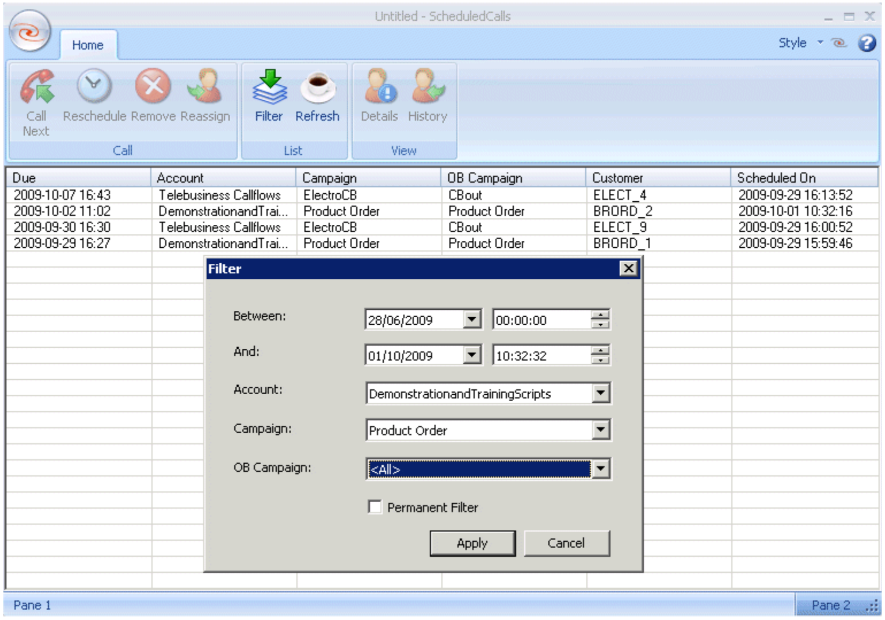
- Select the ***Name*** of the agent to whom you wish to assign the call.
- Click ***OK*** to confirm the action or ***Cancel*** if you do not wish to reassign the call.
- Click the ***Refresh***  icon to display the changes.

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.*

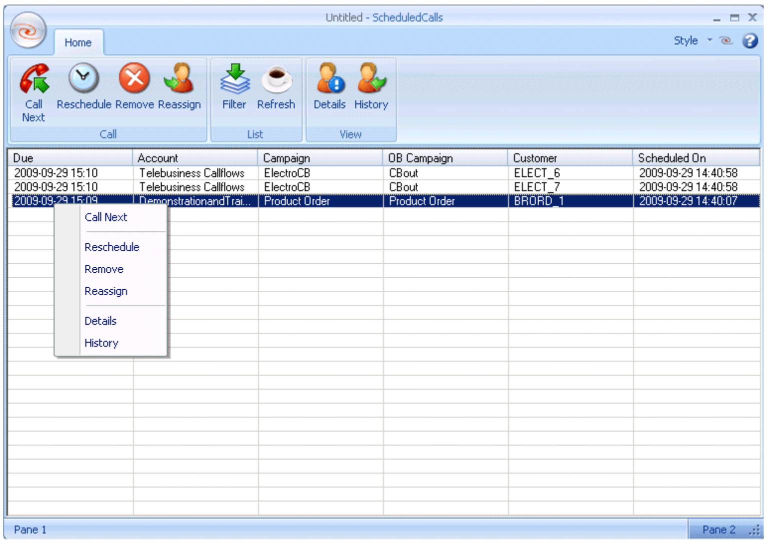
Details

To view customer details of a selected call:

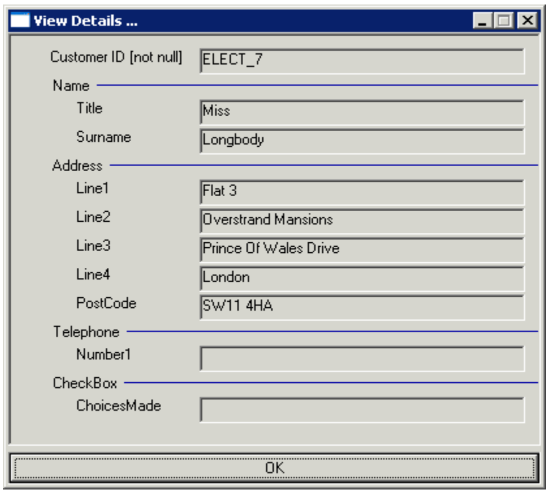
- Click the ***Details***  icon

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.



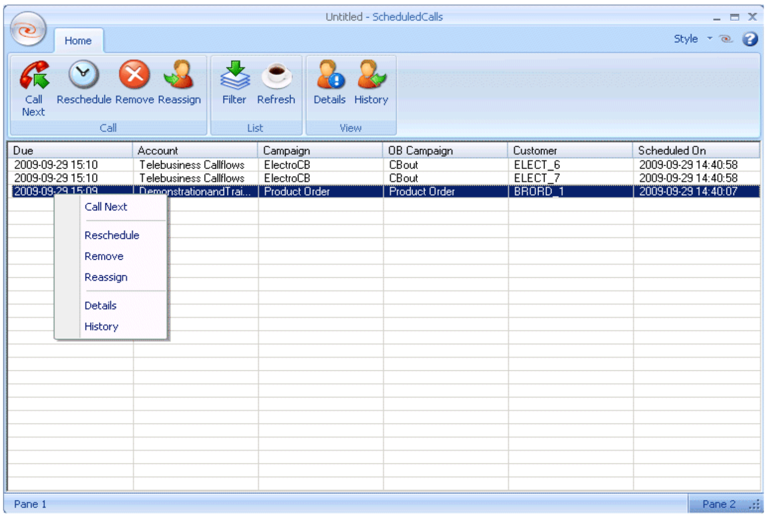
History

To view history events of selected rescheduled calls:

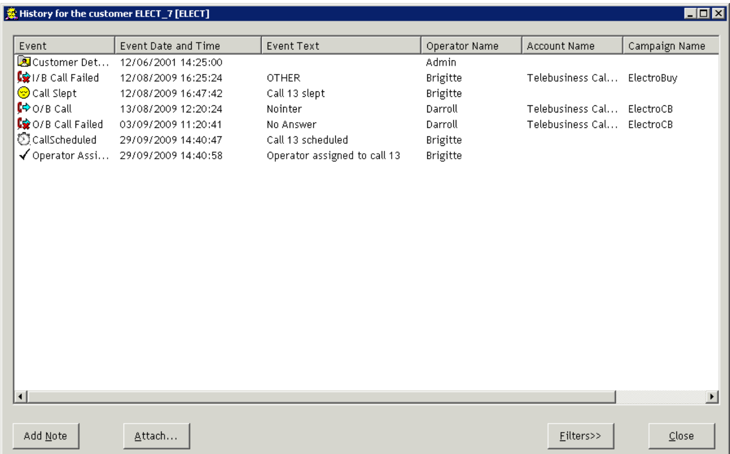
- Click the ***History***  icon

Or

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

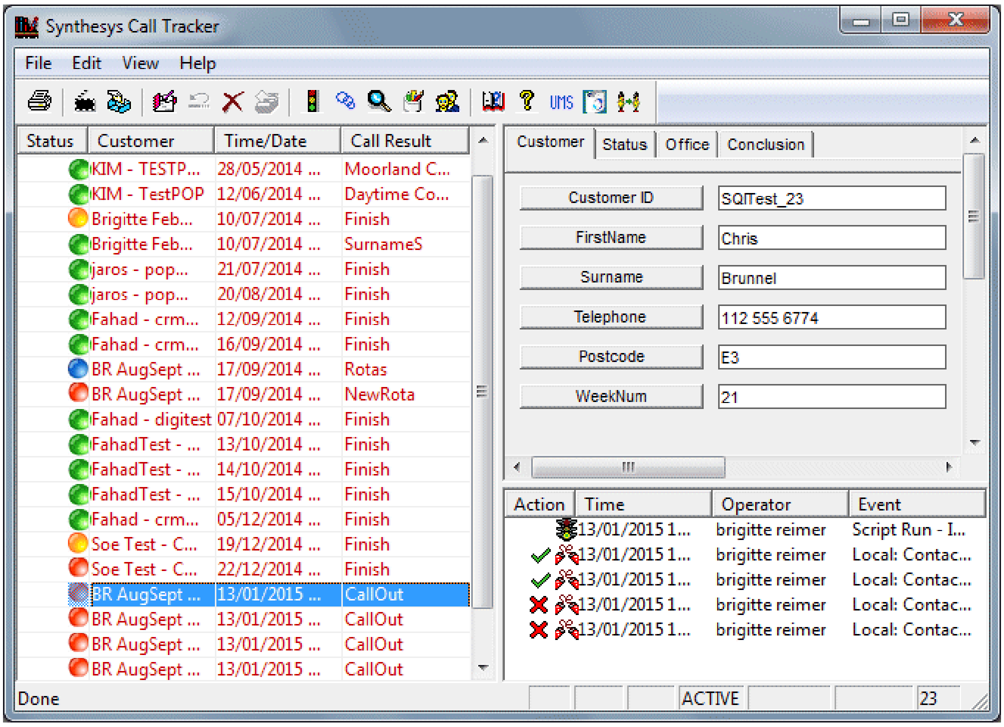


In the ***History for the customer*** dialog now displayed you can view history events associated with the selected call.



THE CALL TRACKER

Synthesys Workflow



THE CALL TRACKER

Introduction

Calls taken on Synthesys fall into two categories: ***Finalized calls***, i.e. Archived calls that just need reports processed about them and ***Follow-up calls (TA)***, i.e. Active calls that require further actions, for example, paging an engineer or contacting a doctor in an emergency.

The Call Tracker can be set up to provide you with intelligent advice regarding the next appropriate actions to handle each situation effectively. Each stage in the sequence of events is under the control of Synthesys, prompting you at the appropriate time with the next course of action and a choice of alternatives.

Using the ***Teams Augmented Call Tracker*** (TACT), active calls can be filtered according to teams so that agents only handle calls from campaigns assigned to their team or it can be used to pass a callflow together with all call details for processing to different departments.

The Call Tracker main screen can be used to access details of any call that is stored within the Synthesys system. The five available call states include:

Active:	Calls that require action in the Call Tracker before the call can be cleared.
Inactive:	Calls that have been completed (i.e. all relevant actions have been taken). They are no longer active, yet the call has not been archived.
Archived:	Calls that have been taken and need no further actions.
Testing:	Calls that have been completed as test calls.
Discarded:	Calls that are marked as discarded (deleted) in the database.

Call tracking allows existing data in the database to be retrieved, viewed and amended if and when necessary and the Call Tracker can be used to follow up and monitor calls that have been taken.

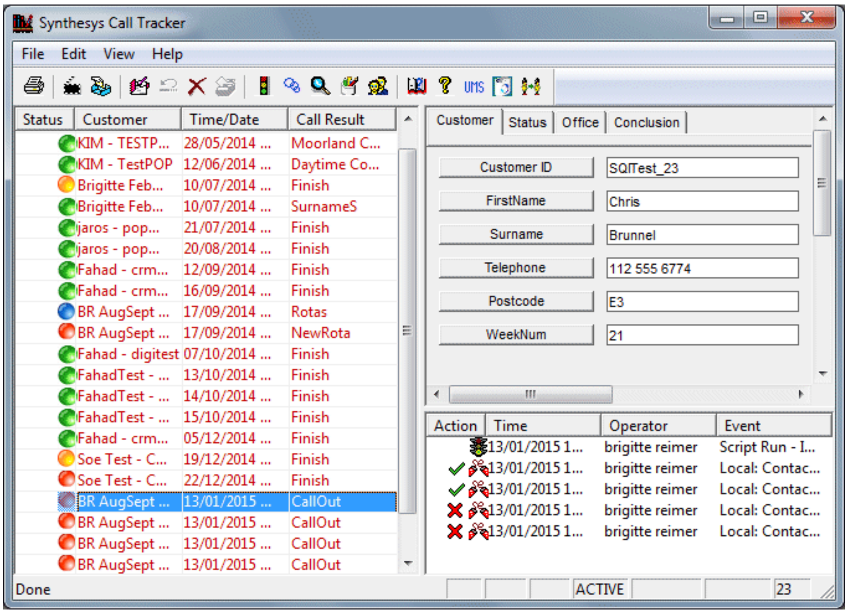
Noetica

THE CALL TRACKER MAIN SCREEN

The Call Tracker is an extension of the Agent Workstation and as such can only be accessed from within the ***Agent Start Work*** screen. The Call Tracker starts automatically when a TA call is completed.

- To start the Call Tracker manually, click on the Call Tracker  icon on the *Take Calls* toolbar.

Viewing Call Details



Tab buttons to check Call details

Call Details Area

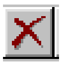
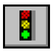
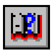
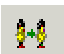
The Call History

The Call Listing Area. Coloured icons show the priority level of the callout: Green=Normal, Blue=Priority, Amber=Urgent, Red=Panic

Call Listing Area	Displays a list and summary of all Active calls. Calls are automatically sorted in date and time order, with the most recent calls shown at the bottom of the list. To sort a call by *Customer*, *Date and Time* or Call Result, click the appropriate column heading.
Call Details Area.	Shows details of the call handled, with notebook style tabs being displayed for each screen of the callflow. Click on a tab to display that screen of information. Use the scroll bars to display information not currently visible.
Call History Area	Displays a summary of actions that have been taken and by whom.

To view further details attached to a call action, double click on the required action to display a dialogue box showing relevant details. Click OK to close the dialogue box.

Explanation of Icons

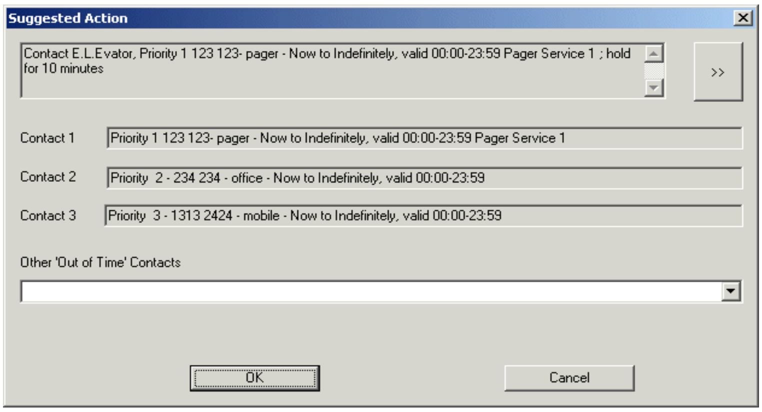
Button	Used To
	**Print**: Print the details of the currently selected call.
	**Add Action**: Add an action to the currently selected call.
	**File/Archive a Call**: Quick way of Archiving a call. Active calls can be archived immediately, without having inactive status first.
	**Add a Note**: Add a note to the call history of the currently selected call. Notes can be added to any call, regardless of status.
	**Reactivate**: Reactivate the currently selected inactive call and add an action to the call's history.
	**Clear Call**: Clear the call from the Call Tracker and store it as an Inactive call. Inactive calls can be reactivated again if required.
	**Archive an Inactive Call**: Quick way of Archiving an Inactive call.
	**Edit Call**: Re enter the callflow and edit the details recorded for the currently selected call.
	**Linked Flow**: Display another callflow, linked to the current callflow.
	**Search**: Display the *Search* window, from which you can retrieve calls that match certain selection criteria.
	**Active Calls**: Display all *Active* calls that are stored on the system.
	**Rotas**: Display *Rota* information, used in conjunction with call actions, such as contacting an engineer to go out on a site visit.
	**Help Page**: Display Web Browser style help for the currently selected call.
	**About Call Tracker**: Display information about the version of Call Tracker you are running.
	**Unified Messaging Service**: Send a message to several recipients via fax, email, SMS or pager.
	**Discarding Call**: Move the discarded call into the Discarded folder.
	**Pass to Team**: Select a team and to pass the call to the selected team.

ESCALATION PROCEDURES

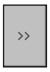
To add an action to a call that has a Follow-Up Procedure assigned:

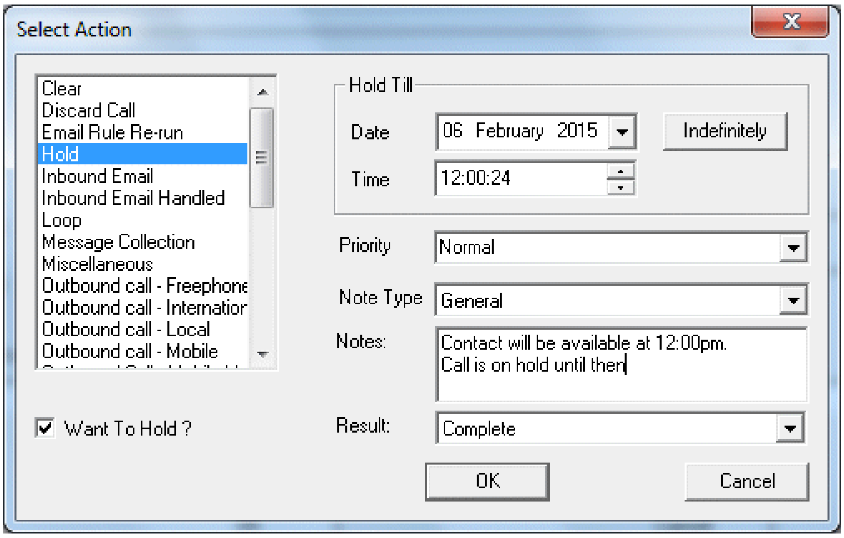
- Click the ***Next Action***  icon on the toolbar

The ***Suggested Action*** window will open, showing the next logical action that should be taken for the call in question:



Each suggested action is taken from the Follow-Up Procedure assigned to the call, for example to call a site engineer, with the contact numbers displayed.

- To carry out the suggested action, click ***OK***.
- To leave the *Suggested Action* window without adding an action to the call, click ***Cancel***.
- To choose your own action, click on  to display the Select Action window and select the required action.



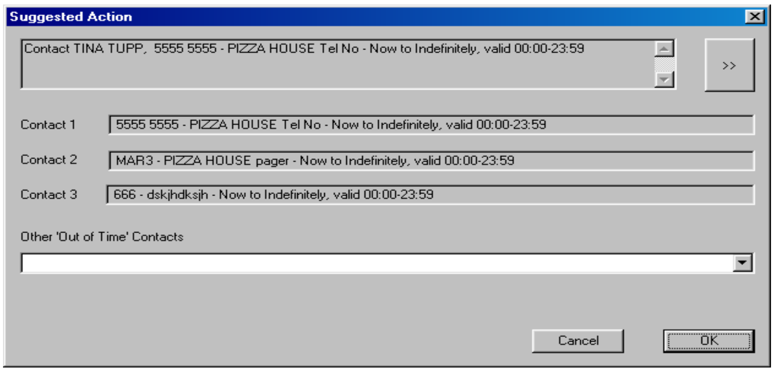
The **Priority** field indicates the importance assigned to the action.

Select the relevant **Note Type**, i.e. called client, from drop down list.

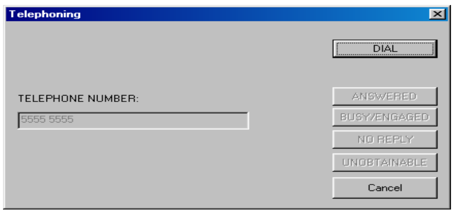
The **Notes** box can be used to record any relevant commends associated with the action or note type.

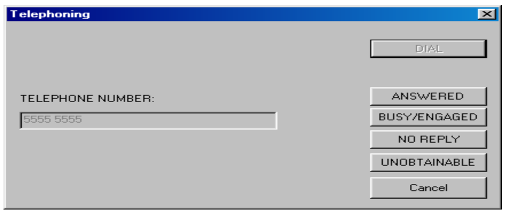
Automated Dialling

- Click OK, to contact the person displayed in the ***Suggested Action*** window.



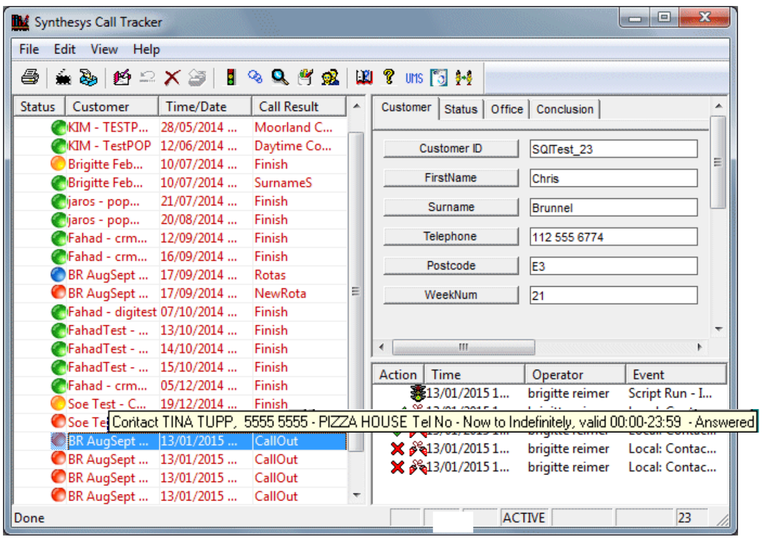
- The ***Telephoning*** window will open with the number to be dialled displayed.
- Click the ***Dial*** button to dial the number shown.
- If the person to be contacted answers the phone, click the **Answered** button.
- If not, select one of the available options, as appropriate: **Busy/Engaged, No Reply, Unobtainable.**





The contact details will now be displayed in the event section of the Call Tracker screen.

- Move your mouse pointer over the action to check details,



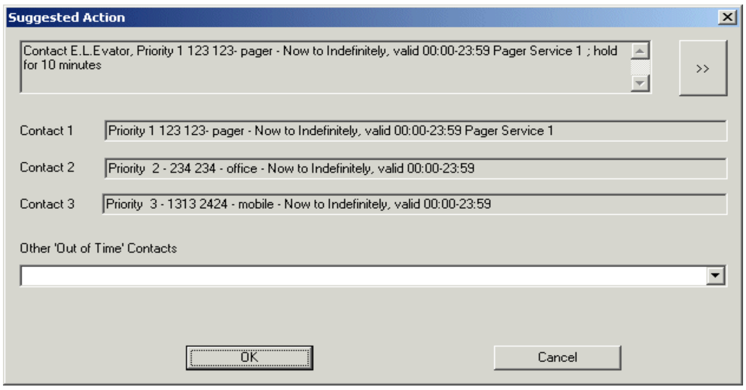
Green tick: action completed successfully.
Red tick: action was unsuccessful and further actions are required.
Blue arrow: message has been sent to pager service provider.

In our example Tina Tupp has been contacted and answered the call.

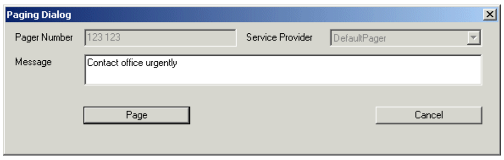
Coloured icons show the priority level of the callout: Green=Normal, Blue=Priority, Amber=Urgent, Red=Panic

Paging

Another action available is contact by pager. Click OK to activate the action.



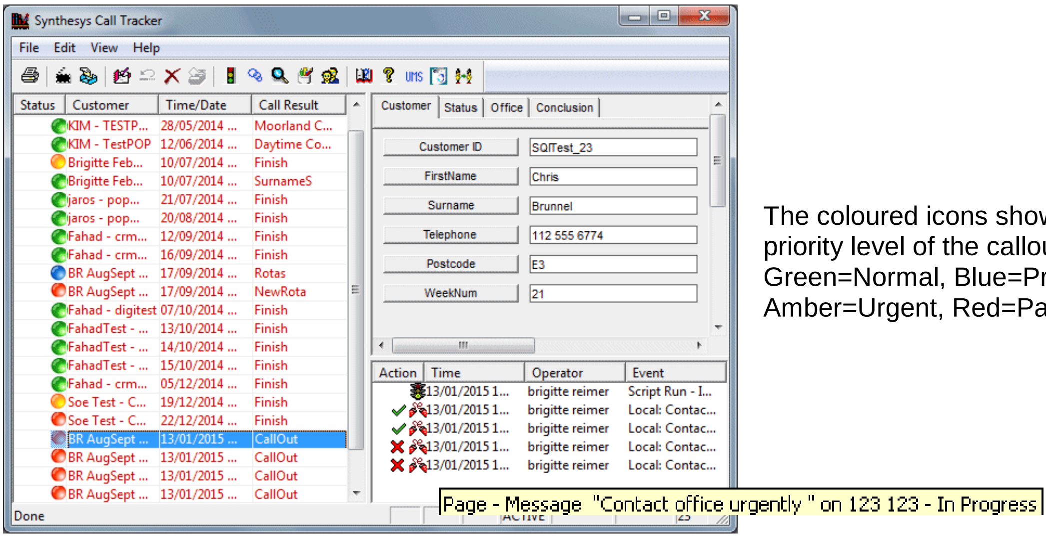
The Paging window will be displayed containing the pager number and service.



- Type in a short note, then press the ***Page*** button to send the message to the Pager Service provider, who will pass it on to the specified pager.

In the event section of the Call Tracker screen you can check the details of any action taken by moving your mouse pointer over the action.

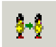
- The ***blue arrow*** indicates that paging is in progress.
- A ***green tick*** shows that the paging process has been completed and that the Pager Service provider has received the message.

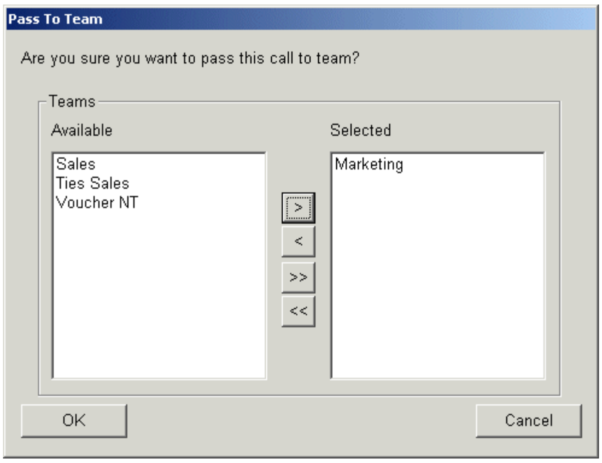


The coloured icons show the priority level of the callout: Green=Normal, Blue=Priority, Amber=Urgent, Red=Panic

Pass to Team

As part of the escalation procedure, calls can be passed to agents belonging to a specific team using the Pass to Team action.

- Click the ***Pass to Teams***  icon on the Call Tracker toolbar.
- The *Pass to Team* window will open, containing a list of all the Teams that have been created in the Synthesys *Team Manager*
- Select the required team and use the < > arrows to move the team from Available to Selected
- Click OK to pass the call to the selected team.



If you are not a member of this team, you will no longer see the call.

Different Types Of Action

When an action has been assigned to a call, it is displayed in the Call History Area.

Outbound Call Actions

Outbound Call Actions indicate that an external call has been made. This may have been a follow up call to the customer, or to an engineer to arrange a site visit. Outbound actions include:

- Mobile Message.
- Freephone.
- Local.
- National.
- International.
- Mobile.
- Pass to Team
- Web Help
- Restart TA Script

Page Call Actions

A Page Call Action shows that an Agent has tried to contact a third party, such as an engineer and include:

- Message Pager
- Message Beep.

Status Actions

A Status Action can be used to show the status of a call while it is Active. For example:

- Clear.
- Pass.
- Hold.

Miscellaneous Action

The Miscellaneous Action can be used to add notes to the call history, which are not directly associated with any other action.

Miscellaneous.

Message Collection Action

The Message Collection Action can be used to record a response to a message, for example an engineer responding to a page call.

Message Collection.

Script Run Action

The Script Run Actions show that a Callflow has been run to collect information from a caller. An Action for an Inbound Call is always shown as the first action stored against a call, because of the caller contacting the call centre. The script run actions include:

Inbound Call.

IVR Recorded Call.

Data Entry.

Reactivate Actions

The Reactivate Action can be used to modify the status of a selected call. It changes an Inactive call so that it becomes Active again.

Reactivate.

Reprioritize Actions

The Reactivate Action can be used to modify the Priority of a selected call.

Reprioritise.

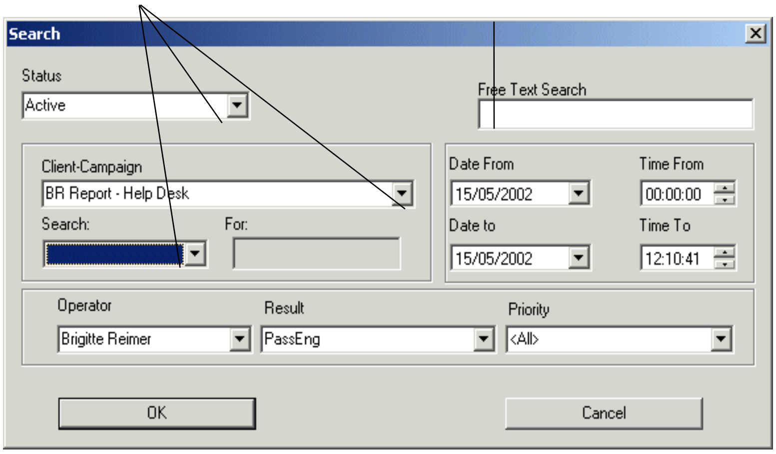
The Search Facility

A search facility is used to identify calls in the Call Tracker main screen with specific criteria. For example to display *Active* calls with a particular call result.

- To open the search window, click the icon on the toolbar:

Search criteria can be selected using the pull down lists.

A free text search, to search for a specific reference number or customer ID.



A date/ time range for the search can be entered here.

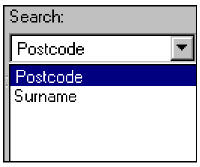
Date/time range search criteria
can be entered here

- Click on the button to select the required criteria from the drown menu.

Searchable Fields

Searchable fields are defined as part of the callflow design to allow the search for entries made into specific fields within a callflow for example a caller's surname or a postcode.

- To perform a search based on a Searchable field, use ***Search*** pull down list:



Only the searchable fields associated with the currently selected campaign are available for selection.

- When a selection has been made, enter the required criteria into the ***For*** field.

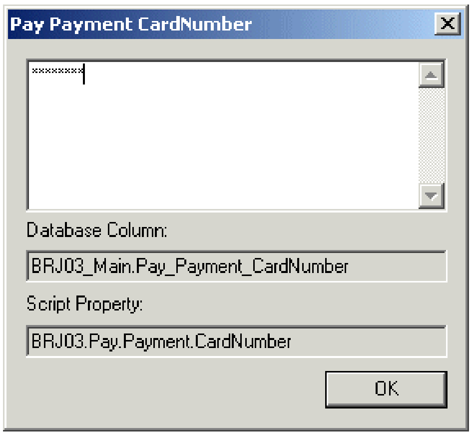
In the example we search for a specific postcode in the *Postcode* field to retrieve calls with a postcode of B98 7BP.

Hidden Fields

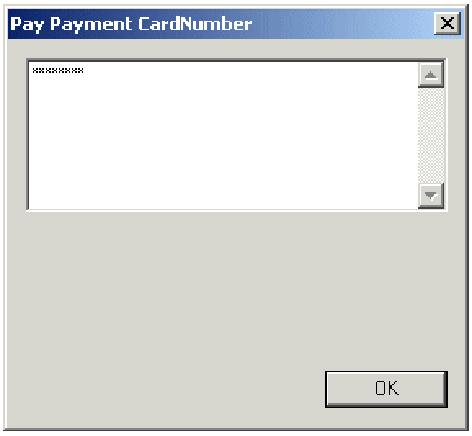
When assigning access permissions in *Synthesys Personnel*, certain database information may be hidden from view when call details are displayed in the Call Tracker.

In our example, the credit card number is hidden from view.

It is also possible, to display or hide the database column name and script property name of selected ActiveX controls from view.



Database column name and
Script Property name displayed



Database column name and
Script Property name not displayed

Changing Rotas & Contact Details

Synthesys uses the theatre metaphor for the Call Tracker.

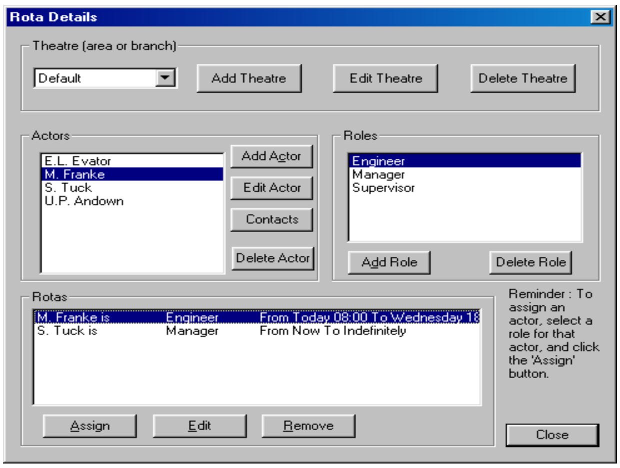
Rota:	Company employee work roster.
Actor:	The different individual employee's within a firm/company.
Role:	The positions of employment held by certain individuals within a company. Every actor must be assigned a role.
Theatre:	A branch/area. A Company may have several of these, all of which need to be incorporated into the Callflow. Every branch will have different rotas, actors and roles.

In the following example you will change the work rotas for the two engineers Mr. Andown and Mr. Evator and add a new engineer M. Franke and contact details.

- At the *Call Tracker* main screen click on the Rota  icon.
- In the *Select Which Rota* window select the 3-letter prefix ***TLR*** for the ***Tuck Lift Repair*** account.

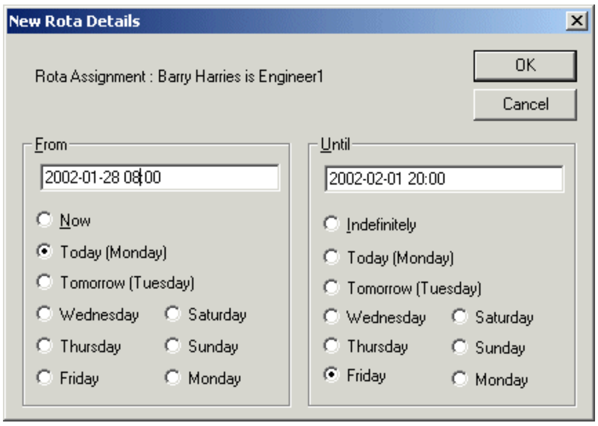
In the *Rota Details* window now displayed:

- Select *Add Actor* and add the name of M. Franke *and click OK.*
- To assign M. Franke the role of engineer, select ***M. Franke*** in the *Actors* window and ***Engineer*** in the *Roles* window and click ***Assign***.
- In the New Rota Details window displayed, enter appropriate rota details, i.e. from today 08:00 to Wednesday 18:00. Click OK to return to the Rota Details window.



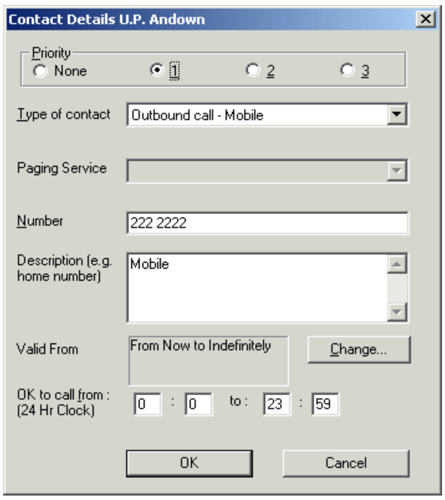
The information 'M. Franke is Engineer from Today 08:00 to Wednesday 18:00' has been entered in the 'Rotas' section.

- Assign the other two engineers new work rotas for the week ensuring that one of them is always on duty.
- Click OK to close the Rota Details window.



Allocating the contact numbers for M. Franke.

- Select the engineer M Franke and click the ***Contacts*** button to open the Contacts dialogue box. Click ***New.***
- In the Contact detail box select **Priority 1** and from the Type of contact pull down list select **Outbound call – Mobile**.
- Add a hypothetical telephone number and enter Mobile in the description box and click OK to return to the Contacts dialogue box.



- Add a second telephone number, select Priority 2 and click OK.
- Close the Rota Details window to complete the exercise.

NOETICA ACTIVE X

STANDARD

ACTIVE X CONTROLS

NOETICA ACTIVE X CONTROLS

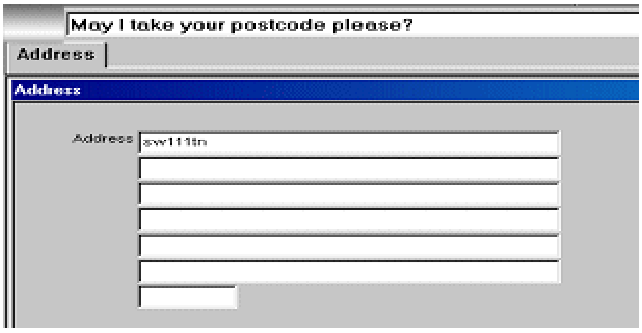
Noetica Active X Controls continued..

Address

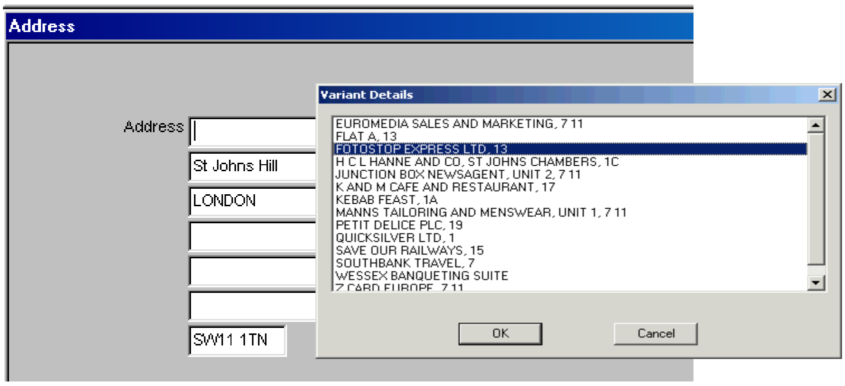
The Noetica *Address* control is used to collect the caller's postal address including the postcode. To enter Address details into the control:

- Move your mouse pointer into the first line of the address control and then click the left mouse button.
- Next, type the caller's full address in the same way, as you would do completing a form.

If additional addressing software is used, the address can be automatically completed on entering the postcode.



- Enter the caller's postcode into the first line of the address control and press ***Enter*** to display the caller's address.
- Select the apartment number or house name from the list displayed, to place it into the first line of the address control.



- To quickly clear an address so that you can add a new address, press the **F2** Function key at the top of your keyboard.

To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Application Launcher

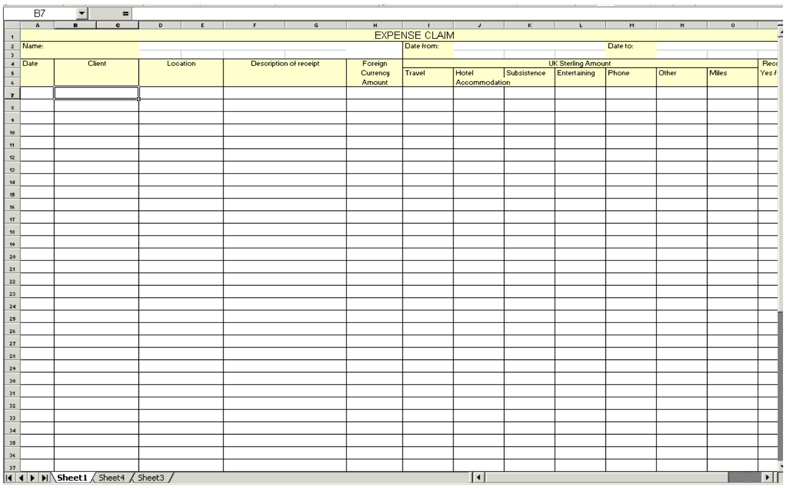
The *Noetica Application Launcher* control is used to link Synthesys to other applications by launching target applications at strategic points in the Callflow.

To open a file in the target application:

- Click on the button displayed. The name of the button will reflect the type of application that you are about to open.

In our example an *Expense claim* sheet is opened.

- View details, add new entries or make changes, as required.
- When exiting the target application, you will return to the Synthesys callflow.

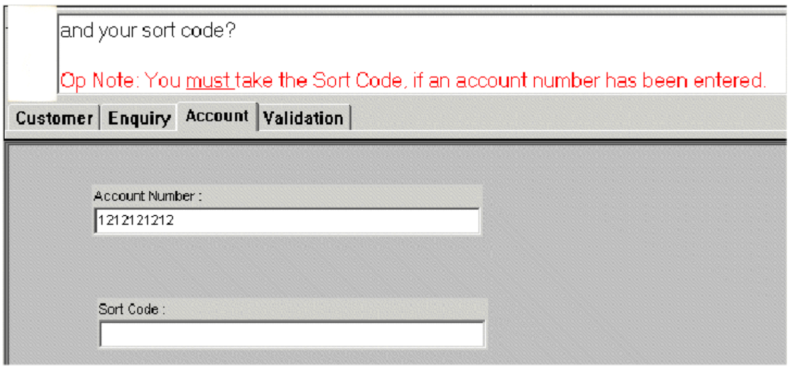


Click the *Next Question* icon to move to the next screen of the callflow, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Blocking

The *Noetica Blocking* control is an invisible control used in conjunction with calculations that will stop agents advancing in a callflow, if they do not enter the required information.

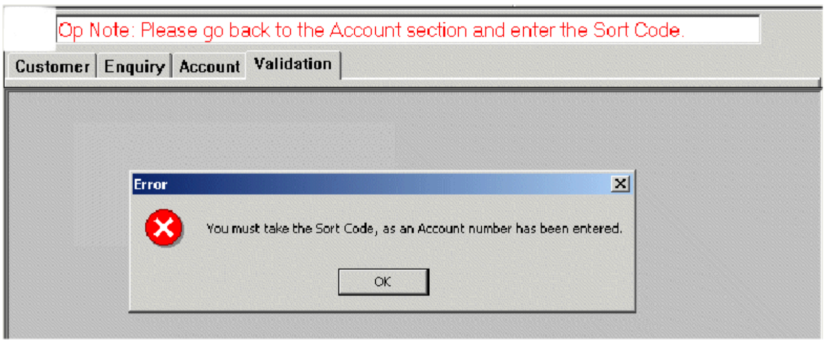
In our example, the *Sort Code* must be added, if account details have been entered.



If you ignore the prompt and carry on in the callflow without entering the *Sort Code*, the *Blocking* control will stop you from moving further, until you enter the Sort Code.

An error message will be displayed, informing you what you need to do:

"You must take the Sort Code, as an Account number has been entered."



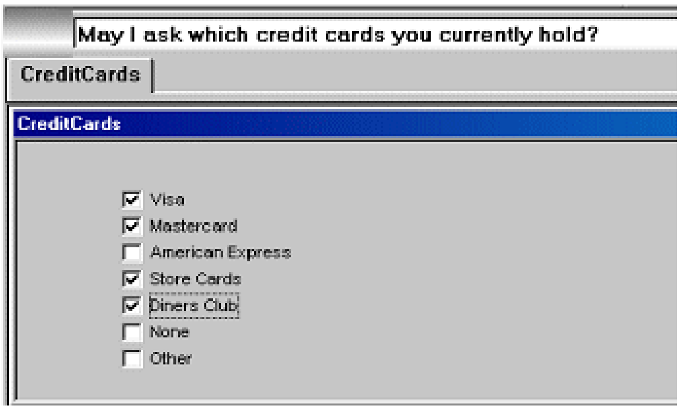
When you have entered the required information:

Click the *Next Question* icon to move to the next screen of the callflow, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Checkbox

The *Noetica Checkbox* control displays a row of choice boxes. You can select as many options as is required.

- To make a selection, click the left mouse button into a box.
- A black tick will confirm the selection, i.e. 'Visa, MasterCard, Store Cards….'



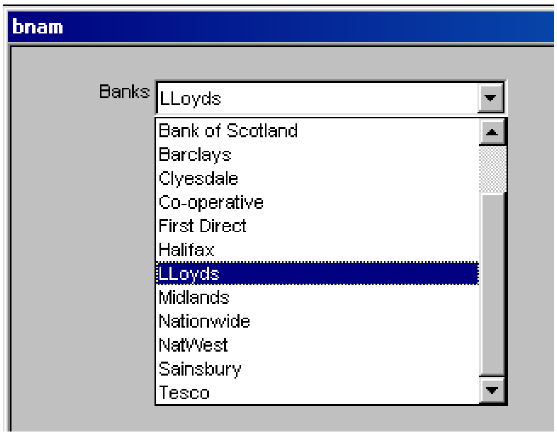
You can also use the arrow keys on your keyboard to move between the available options and make the selection using the space bar.

To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Combo List

The *Noetica Combo List* control contains a list of items displayed via a drop down menu.

In our example we display a list of bank names.



To select the required item:

- Move your mouse pointer on the arrow of the 'Banks' box.
- Click your left mouse button to open the drop down menu with a selection of different banks.
- Select the required bank name from the list by clicking your left mouse button on the bank name.

You can use your mouse pointer and the vertical scroll bar to move up and down the screen, or you can use the arrow keys to the right of your keyboard

To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

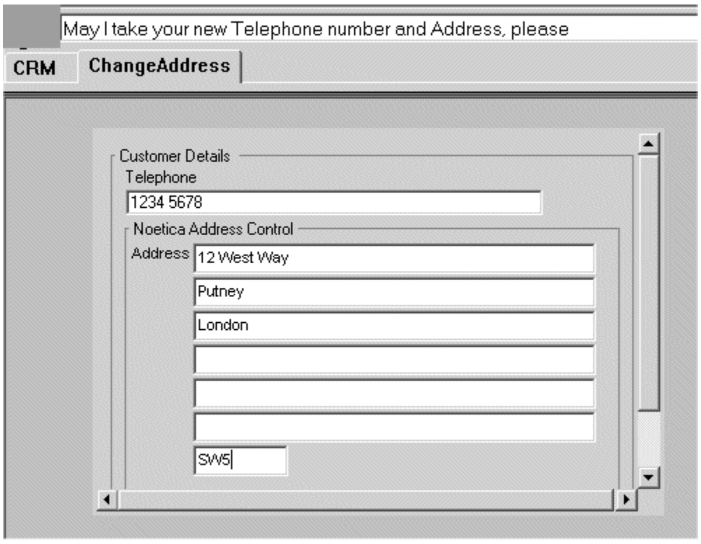
CRM Property

The *Noetica CRM Property* control can be positioned at strategic points anywhere within the callflow to enable the modification of selected customer details.

On reaching the CRM Property control, details associated with the selected customer are displayed. In our example they include the customer's telephone number and address details.

To modify and update the information:

- Click your left mouse button into the relevant fields and replace the existing information with the new details, as required.
- If you want to clear the existing information first, before updating the details, press F2.
- If a ***Save*** button is displayed, you need to press the *Save* button to commit the changes to the database and to update the customer record.



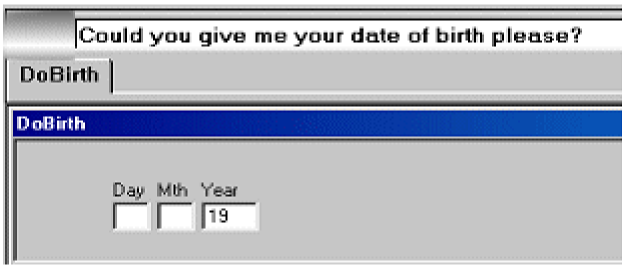
*If the control has a **Save** button, you must click it to save the changes and to commit the updated customer record to the database.*

*If no **Save** button is displayed, the changes will be save automatically.*

To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Date of Birth

The *Noetica Date of Birth* control is used to enter the caller's day, month and year of birth.



To enter a caller's date of birth:

- Click the left mouse button into the ***Day field***.
- Enter the caller's day of birth.
- Use the Tab key to move into the ***Month*** field and enter the month in which the caller was born.
- Move into the ***Year*** field and enter the year of birth.

Pressing Shift⇑ and Tab on your keyboard will enable you to move back to the previous field again.

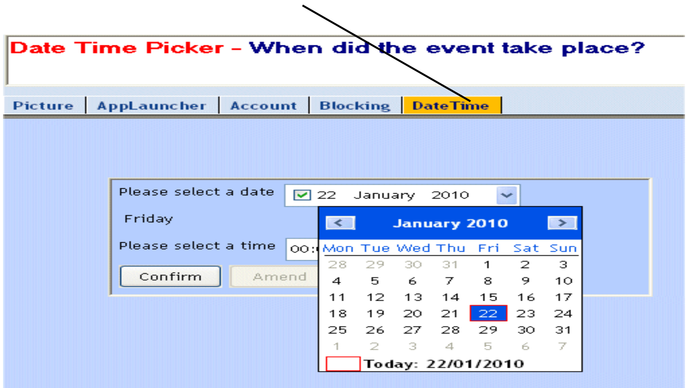
To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Date Time Picker

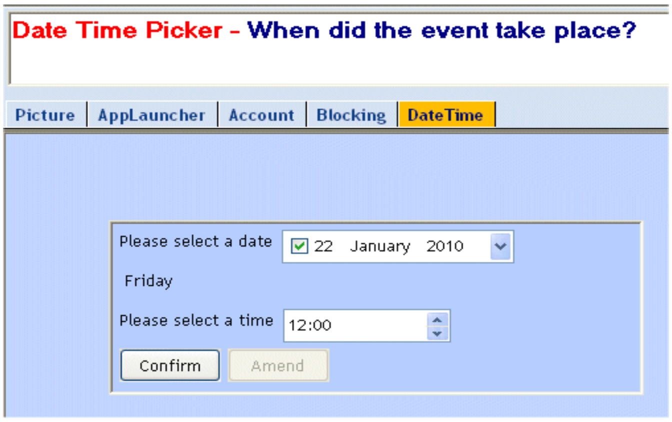
The *Noetica Date Time Picker* control is used to select any date in the present, past and future and depending on the configuration also a time.

To select a date:

- Click on the arrow of the ***Please select a date*** field, to open the diary page.



- Locate and select the required date. A tick will automatically be placed into the *Please select a date* box.
- If the time option is displayed, place a tick into the ***Please select a time*** box and select the time, as required.

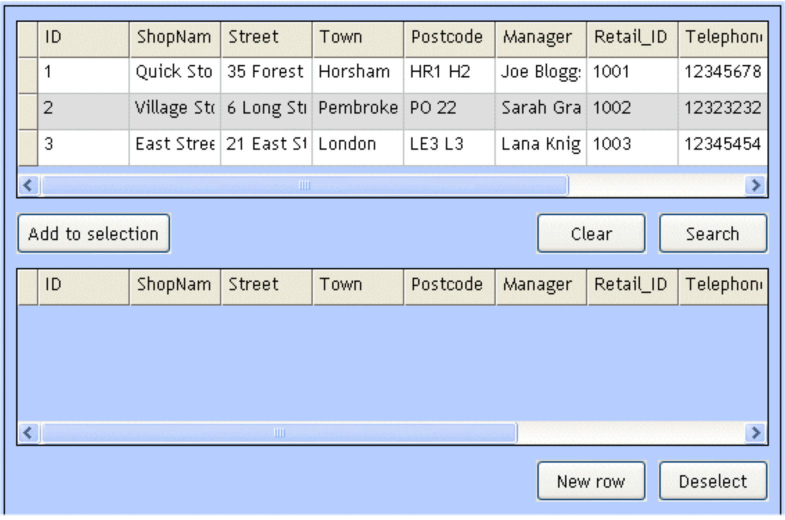


- If the ***Confirm*** button is displayed, click the button to confirm the date and time selected.
- To change the date and time that you have entered, click the **Amend** button and select the appropriate date and time, repeating the above steps.

To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Noetica Data Viewer

The *Noetica Data Viewer* control displays information from a data table or view in a grid format and allows you to select existing records and to add new records.



Clear button to clear records displayed

Search button to enable the search for a specific record

Selection Area

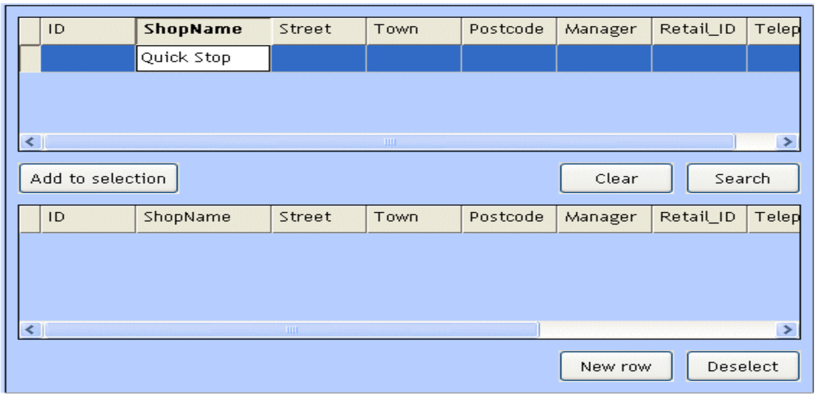
Buttons to add or deselect (remove) rows from the selection area.

Button to add records to the Selection Area

Searching for a specific Record

Providing that no other records are displayed in the *Data Viewer* control, you can search for a specific record. If existing records are displayed:

- Click the **Clear** button first, to remove the records, before typing the search criteria into the relevant field, i.e. a customer name into the name field.
- Click the ***Search*** button to bring up the associated record.

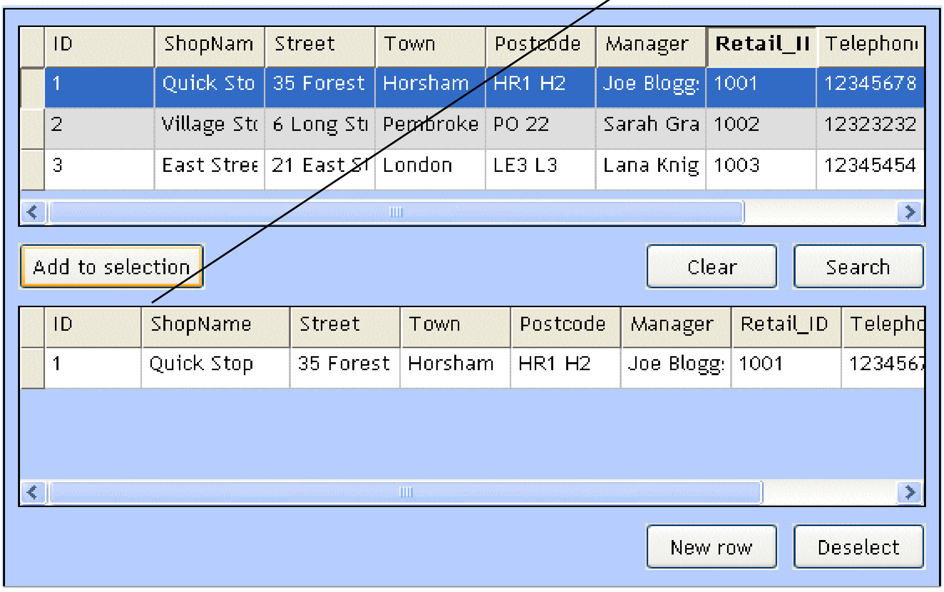


If all available fields must be completed before you can move on, a message will inform you.

Adding Records to the Selection Area

To add a record to the selection area of the *Data Viewer* control

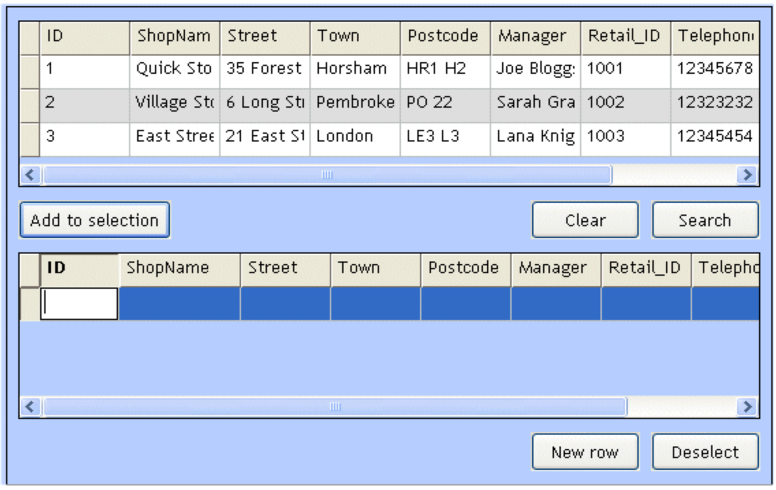
- Select a record as required and click the ***Add to Selection*** button.



Selection Area

Adding new Rows

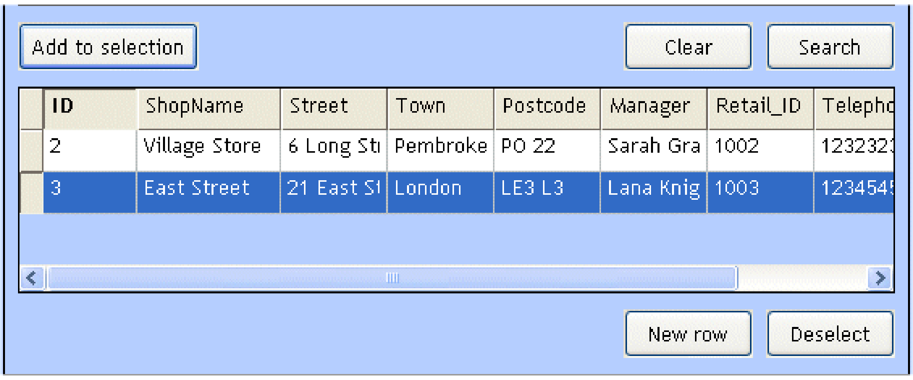
- Click the *Add new row* button, to add a new row to the selection area of the *Data Viewer* control.
- Double click your left mouse button into the first field, to enter information into the fields available.
- Use the tab keys on the keyboard to move to the next fields and back again.



Deselecting Rows

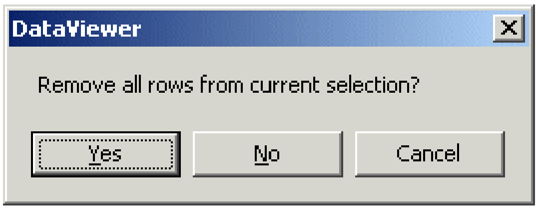
To deselect and remove a specific record only from the selection area:

- Select the record that you wish to remove, before clicking the ***Deselect rows*** button.



To deselect and remove all records from the selection area:

- Click the **Deselect rows** button, without first highlighting a specific record.



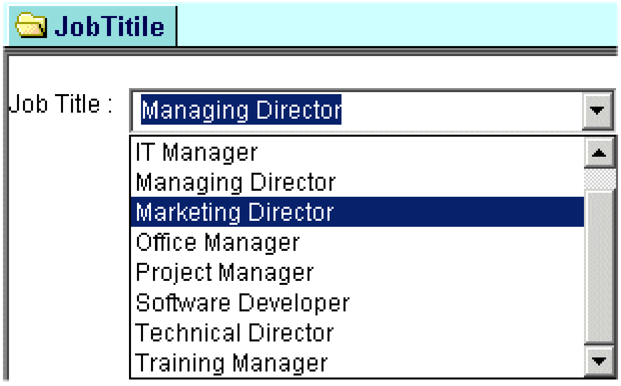
- Click ***Yes*** to remove all or the rows that you have selected from the selection area.
- If you do not wish to remove any rows, click ***No.***

Database Combo box

The *Noetica DB Combo box* contains a list items that are displayed via a drop down menu, in our example a list of job titles. New items can be added to the existing list.

To select the required item:

- Locate, in our example the job title, in the drop down list.
- Click your left mouse button on the chosen option, to select it.
- If the Job Title that you are looking for is not displayed, you can type it into the *Job Title* field.



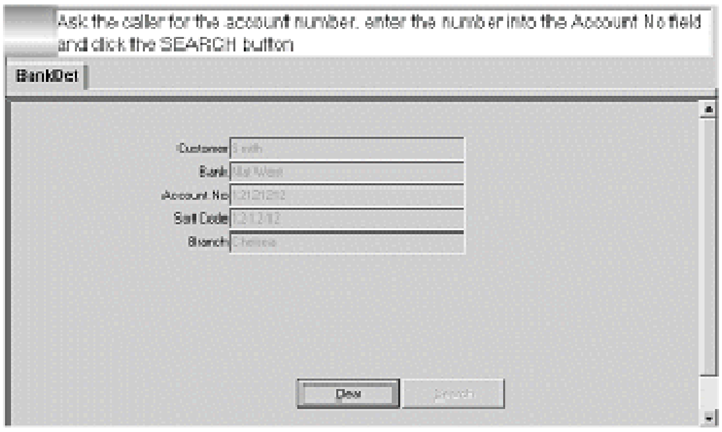
To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

DB Table

The *Noetica DBTable* control is typically used to maintain lists of clients and sites. It allows agents to carry out searches and updates of client information. If the Rota option has been configured, the DB Table can be used to bring up details of call-out procedures for different area offices.

In our example, the DB Table control is used to bring up details of a customer's bank account.

- Enter the caller's account number into the *Account Number* field of the control and click ***Search*** to displays the associated details.
- To remove the information displayed, press the ***Clear*** button.



Entering a star (*) into any of the fields and pressing *Search* will open a list displaying all available customer details.

If more than one customer is listed under the same information, the appropriate caller needs to be selected from the list displayed.

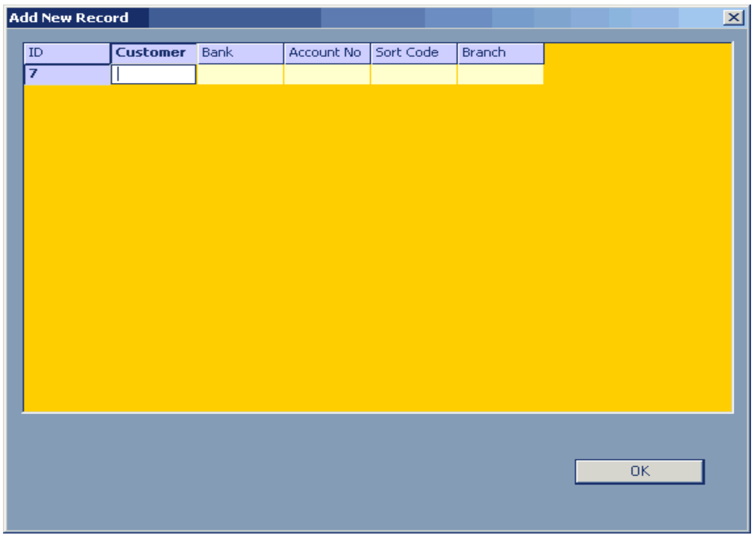
Please see next page for information about entering a new record.

Creating a New Customer Record

Provided that permission has been granted when the control was configured, you will be able to add new customer details to the DBTable control.

If no customers are found, following a search, the ***No Records*** window will open.

- Click the ***Create New Record*** button.
- Enter details for the new customer into the each of the available fields in ***Add New Record*** window.



- Click OK to display the customer details entered.

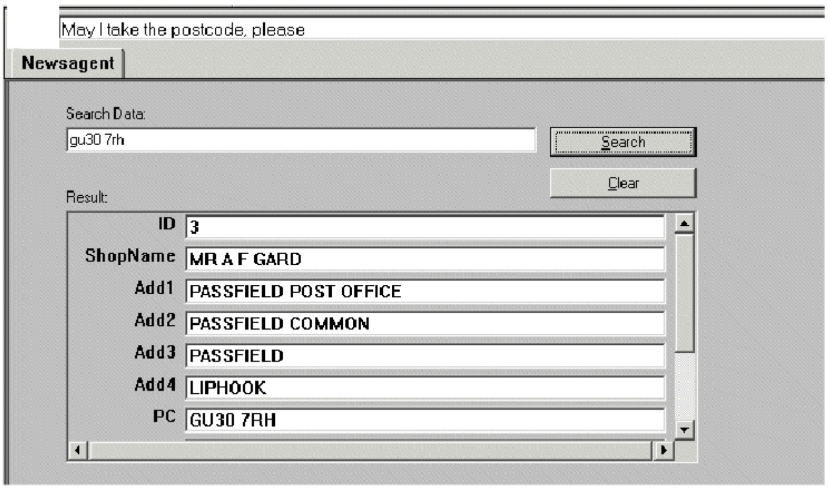
To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

DB Relational Table

The *Noetica DB RelTable* control displays a *Search Data* and *Result* field and a *Search* and *Clear* button. The search criteria to be entered are determined by the search criteria specified when the control was configured.

In our example the search criteria is based on the postcode for an area office. To display details of the required area office:

- Enter the postcode in the ***Search Data field***. The postcode must be entered with a space, i.e. gu30 7rh.
- Click the ***Search*** button to bring up a record in the ***Result*** fields, displaying the address of the area office.



- Click the *Clear* button, if you wish to clear the information displayed in the *Result* fields.

If there is more than one search field match in the reference table, an ambiguity list will be displayed, from which the agent can select the required record.

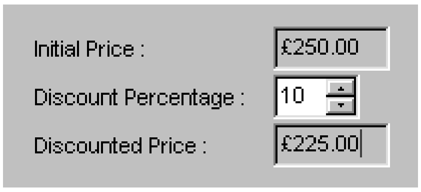
To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Discount

The *Noetica Discount* control is used to display the final amount due, i.e. the *Discounted Price* after a specified discount has been deducted.

The exact appearance of the control is determined when the control is configured.

The control may show the ***Discounted Price*** field, as well as the ***Initial Price*** and ***Discount Percentage*** fields:



The control may only show the Discounted Price field:

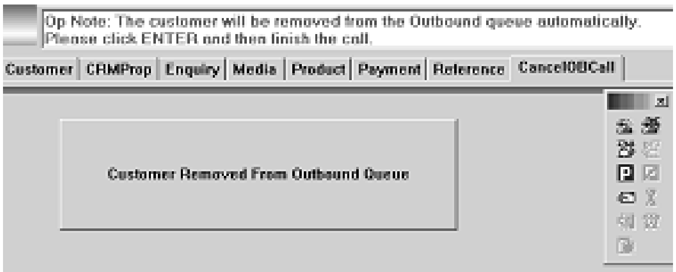
The initial price is either entered by the agent or brought forward automatically via a calculation.

To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Do Not Call

The *Noetica Do Not Call* control is used to remove a customer from an outbound call list if the customer phones in, before the callback is due.

- No action is required when you reach the control.
- Simply press ***Enter*** on the keyboard, to move to the next screen and click OK in the *Conclusion* window to finish the call.



When the call has been completed, the outbound call list will be updated.

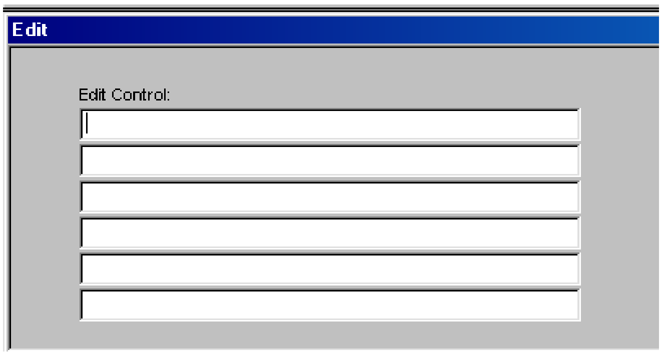
A chequered flag will be displayed next to the customer record in the Outbound Manager, showing a completed call with an event text of ***Removed From Queue***.

Edit

The *Noetica Edit* control can be configured to allow numerical or text input only or to accommodate alphanumeric input.

To enter text into the Edit control:

- Move the mouse pointer into the first line of the control.
- Click the left mouse button and enter your text or numbers, as required.
- Use the Tab keys to move to the next line down.

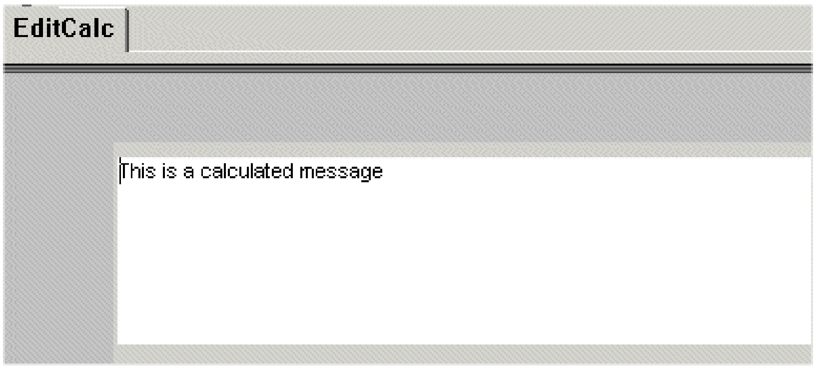


To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Editable Calculation

The *Noetica Editable Calculation* control works like a text control, but the initial Input Value can be set to a calculation. You can then edit this field, and the edited value will be saved to the database.

- When you reach the N*oetica Editable Calculation* control, a predefined text, as set up in the calculation, will be automatically displayed.
- You can now add additional information, overwrite the information altogether, if required, or leave the text already displayed unchanged, as required.



To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

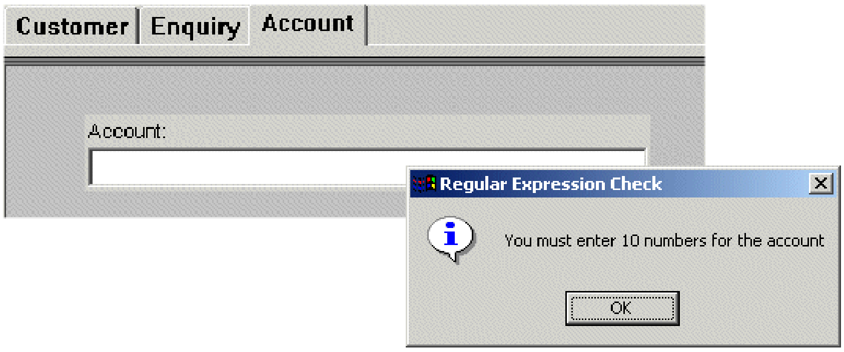
Formatted Edit

The *Noetica Formatted Edit* control uses ***Regular expressions***, to stop you from advancing in a callflow, if the entry does not match the criteria specified, i.e. 10 numbers, or an @ sign for an email address.

In our example, the account number field needs to contain 10 numbers.

- If you enter any other characters, or if the account number entered is longer or too short, an error message will be displayed prompting you with the action to take.

In our example the message reads: You must enter 10 numbers for the account.



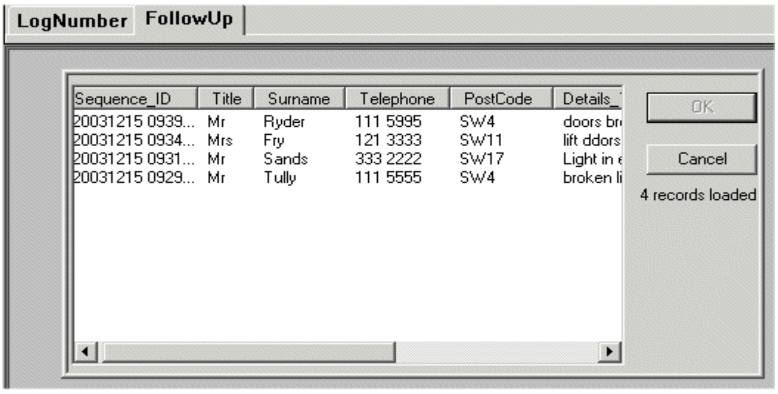
- Enter the 10 numbers, as required.

To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Follow-up

The *Noetica Follow-up* control is used to handle calls that are a follow-up of a previous call. For example, an engineer may phone the ***Engineer Callback line*** to request further information regarding a repair or to pass on details about the solution of a problem, as reported in a ***Repair Line*** campaign.

- If more than one customer record is displayed, select the relevant record from an ambiguity window and click OK.

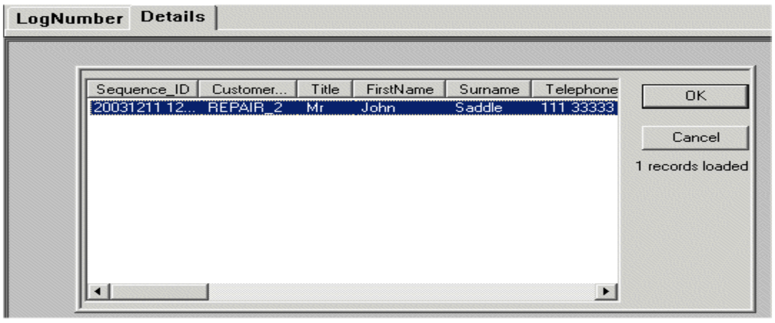


Displaying a customer record based on a Log Number

Usually ***Search Terms,*** for example *a Log Number,* are specified when configuring the Follow-up control, to filter out a specific customer record.

You will enter this log number or ID as part of the callflow. On reaching the Follow-up control the associated customer record will be displayed, showing details for the particular repair request.

- You ***must select*** the record displayed and ***click OK*** to generate a Link.
- ***Check*** that the now ***linked call*** is displayed ***in red.***



- Move to the next section using *Control and Enter* on the keyboard.

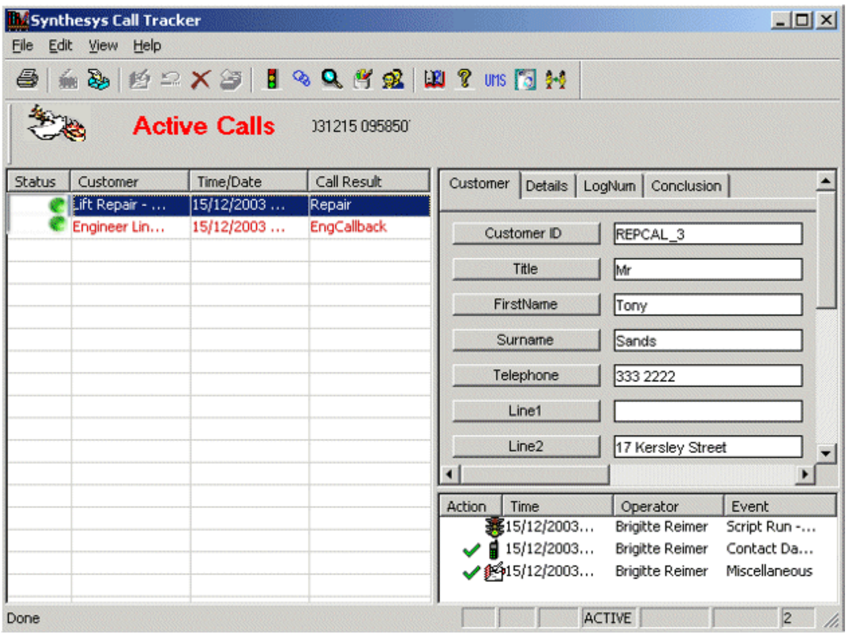
Follow up Control in the Call Tracker

In the Call Tracker you can view details of the ‘Engineer Callback’ and ‘Repair Line’ calls, using the **Link** icon on the Call Tracker toolbar.

- Locate and select your ‘Engineer Callback’ call.

- Click the ***Link***  icon on the Call Tracker toolbar. Now both, the ‘Engineer Callback’ and the related ‘Repair Line’ call will be displayed.

- Click on each call in turn, to view the associated call details.



Macro

The *Noetica Macro* control allows you to invoke macros, to simplify tasks, for example the transfer of selected data to a target application.

To run the Macro, for example to transfer selected information to a target application:

- Click on the button displayed. The name of the button will reflect the task in hand.

The data transferred could, for example, be a specific CustomerID, used to bring up a customer's insurance details from within the target application.

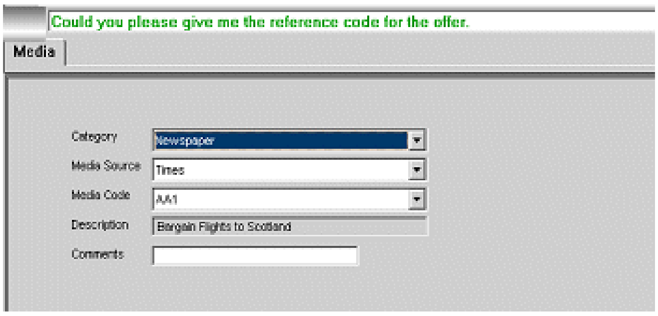
To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Media

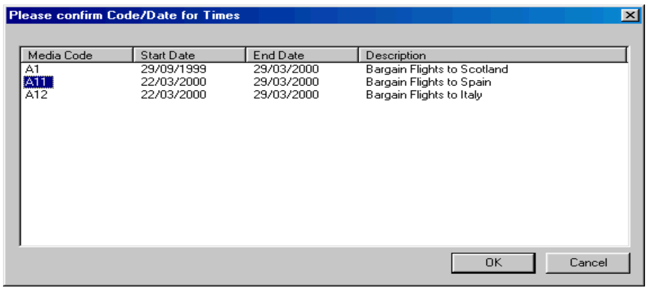
The *Noetica Media* control is used to display a media source and associated information.

- Use the mouse to select a relevant ***Media Code, Media Source*** or ***Category*** from the drop down menu.
- If the Comments field is enabled, enter any comments, as required.

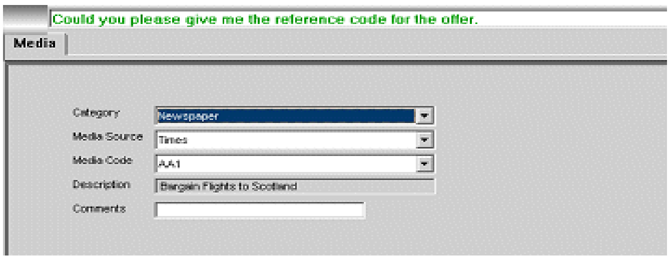
You can use the arrow keys on the keyboard to scroll through the information provided. The Tab keys will move you from one field to the next.



- If more than one media code is associated with the source, the ***Please confirm Code/Date..*** window will open.



- Select the required media code and click OK to display it in the Media control.



To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Memo

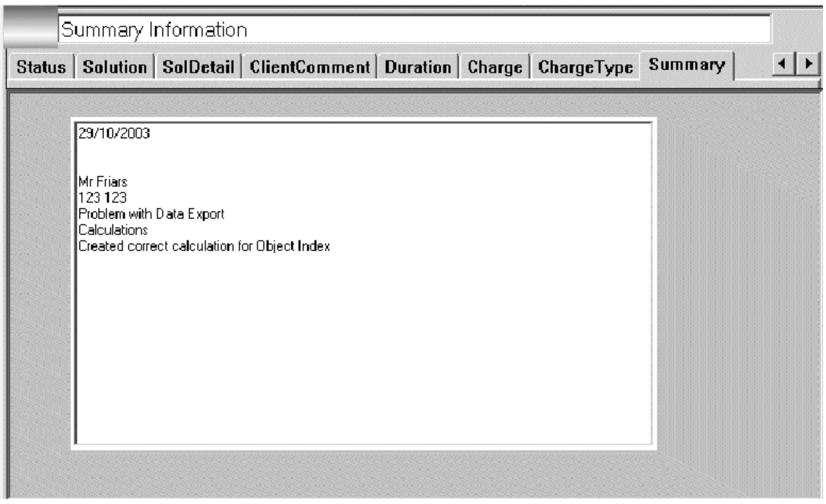
The *Noetica Memo control* allows the entry of large amounts of text, using a memo field in the database, rather than a text field.

Information in the *Memo* control can be displayed:

- In text or in HTML format.
- As a *Read only* page or allow agents to enter text.

The *Memo* control in our example displays a summary of information taken during the call. This information can be used to email a confirmation letter to the customer.

If editing is enabled, you can add any relevant information, as required.



To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Monthly Payment

Using the *Noetica Monthly Payment* control, repayment details over a period of time can be calculated, displaying the number of subsequent instalments and the amount due for each instalment.

- Click on the drop down menu, to select a customer's preferred repayment period from the drop down menu.

The amount of the first and subsequent instalments will be amended accordingly.

To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Name

The *Noetica Name* control is used to collect a caller's title, initials, first and surname. In addition it can be configured to allow the capture of the first name and honours.

- To select the *title*, click your left mouse button on the arrow of the ***Title*** box and select the title from the drop down menu.
- You can use your mouse pointer and the vertical scroll bar to move up and down the screen or you can use the arrow keys to the right of your keyboard

- Use the Tab keys on your keyboard to move forward to the ***Initials, First Name, Surname and Honours*** fields and enter the details as required.

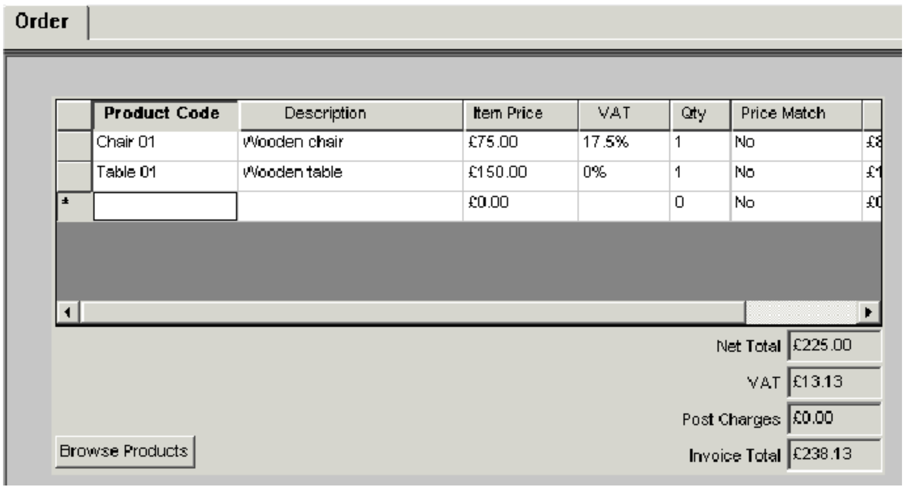
To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Order

The *Noetica Order* control allows the taking of orders including products and prices; discount schemes, postage and packing costs and other features.

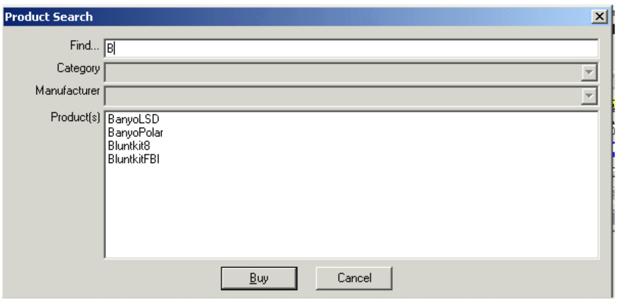
If the caller knows the correct product code:

- Type the ***product code*** into the ***Product column*** to display the product and all relevant details, including a description and the price.
- To change the quantity of items, click on the ***Qty*** cell and enter the required number of items. *Sub Totals* and *Invoice Total* will be adjusted automatically.
- To delete a selected product, click into the left-hand square to highlight the complete row and then press ***Delete*** on your keyboard.



If the caller does not know the product code:

- Click the ***Browse Product*** button to open the ***Product Search*** window.
- The ***Find, Category*** and ***Manufacturer*** fields, if enabled, help with the product search.
- Select the required items from the list and click the ***Buy*** button, to add the selected product to the order form, including the product code, description and item price and to update the Invoice Total.



__Price Match__

If the Discount and Price Match options are enabled and a customer asks for a reduction, as he or she has seen the product at a lower price at another store:

- Click either into the ***Discount*** or ***Price Match*** field for the relevant product to open the *Discount* or *Price Match* window.
- Enter the discount (maximum % discount available should be part of the agent dialogue) or selling price of a single product at the other store and click OK.

- If the price or discount entered is acceptable, window Fig1 will open, confirming that the product will be sold to the customer at the reduced price.
- If the price or discount requested is not acceptable, window Fig2 will open, informing the caller that a price check has to be carried out, before the item can be reduced.

Fig1

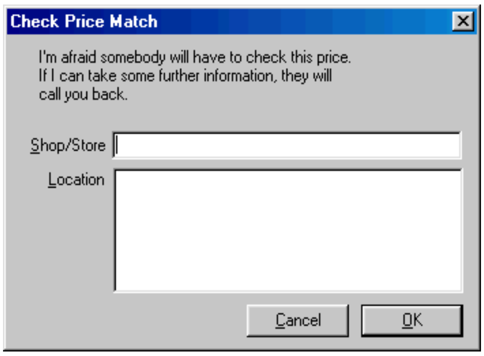


Fig2

When a discount or price reduction is confirmed, the amount in the order control will adjust accordingly and display the lower price as the amount due.

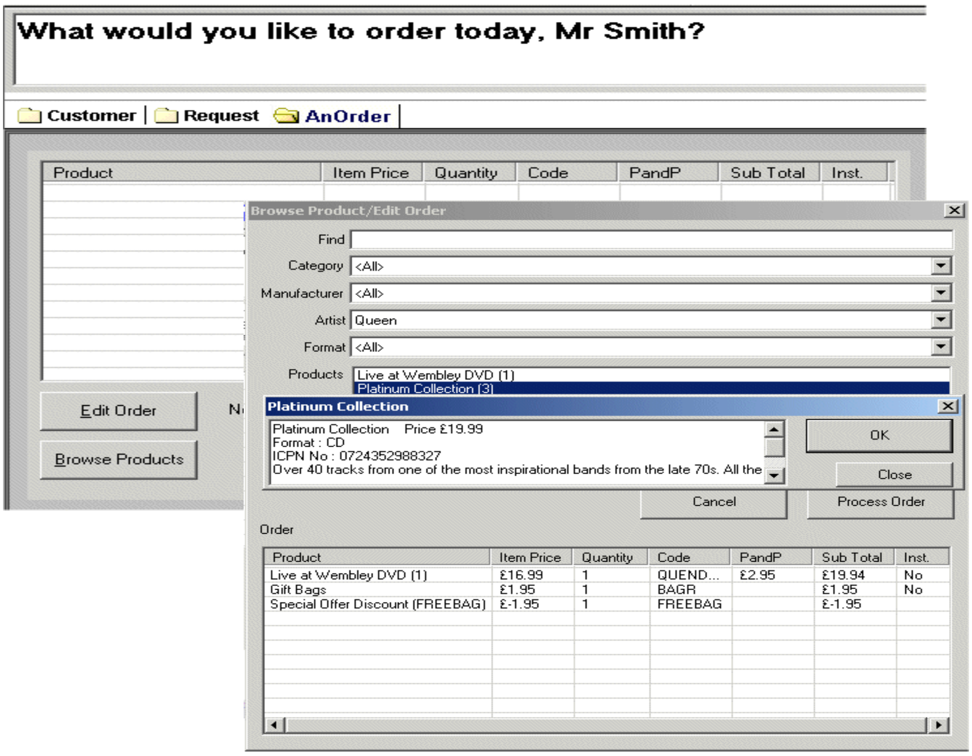
To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Special Order

To process an order:

- Click the **Browse Products** button to open the Browse *Product/ Edit Order* window, to show a list of available products.
- Use the ***Find, Category*** and ***Manufacturer*** fields, if enabled, to help with the product search.
- Double click on the product that the customer wishes to purchase and click ***OK*** in the *Product Detail* window, to add the item to the order form.

The selected products will be displayed in the Order section, including the product code, description and item price. The Invoice Total will be updated accordingly.

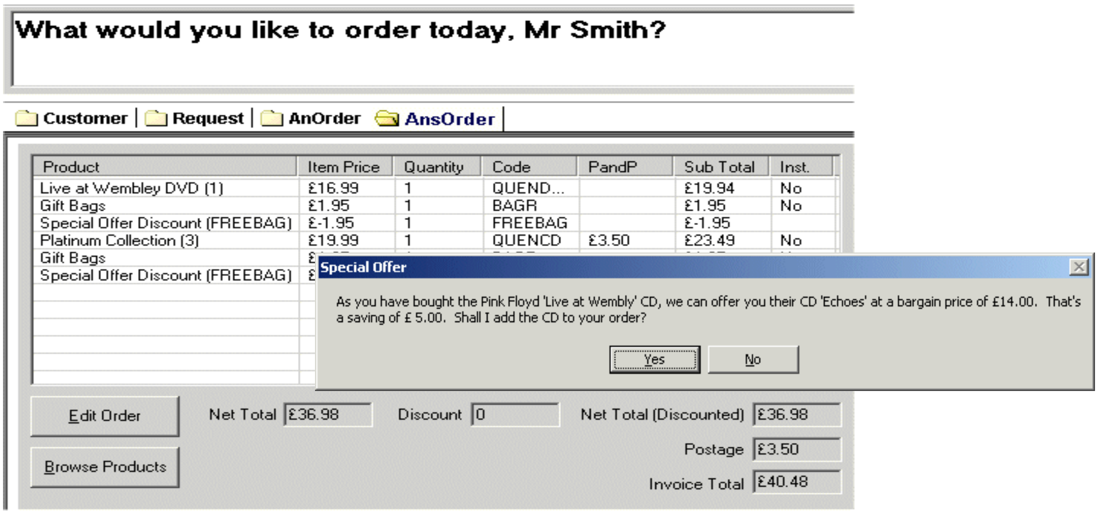


- To close the product details window without adding the selected item to the order form, click the ***Close*** button.
- To cancel the action, without adding any of the selected products to the order, click the ***Cancel*** button.
- To process your order and to return to the Order control main screen, click the ***Process Order*** button.

Editing an Existing Order

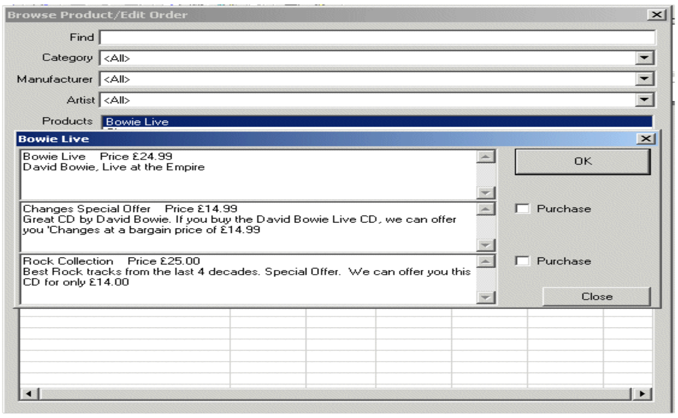
All selected ordered items are displayed in the Order control. To edit an order:

- Click the ***Edit Order*** button to access the Browse *Product/ Edit Order* window.
- To ***change the quantity*** of items selected, click on the ***Quantity*** cell and enter the required number of items. *Sub Totals* and *Invoice Total* will be adjusted automatically.
- To ***delete a selected product***, click into the ***Quantity*** field for that product, type in cero (0), and then click Enter on your keyboard.



A message will allert you about any ***up sell products*** and ***special offers*** connected to a selected product. If the customer wishes to buy any of these:

- Tick the corresponding ***Purchase*** check box to add the up sell product to the order form. Sub Totals and Invoice Total will be adjusted automatically.

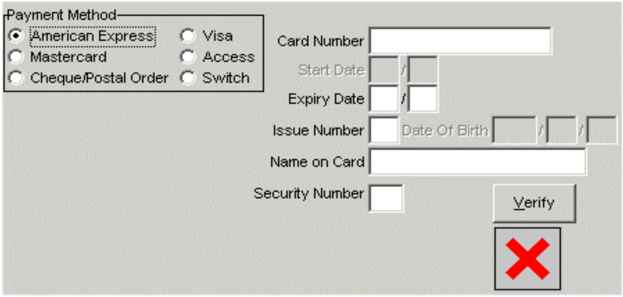


To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

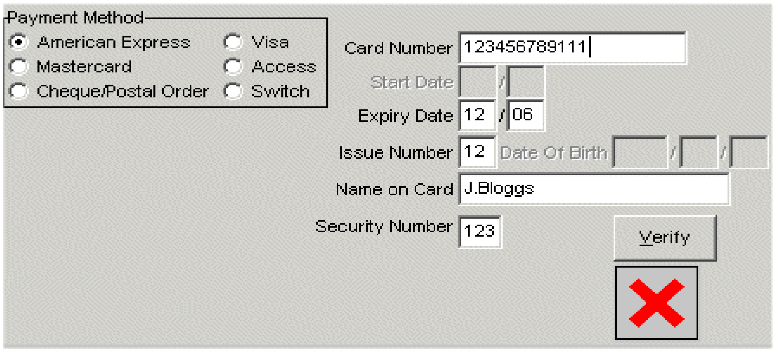
Payment Control

The *Noetica Payment* control is used to collect information on various methods of payment and their related details, such as card number, expiry date etc.

- Tick into the circle next to the credit card that the caller wishes to use, to activate the fields that need to be completed.



- Move your mouse pointer into the ***Card Number*** window and enter the number for the selected card.
- Press ***Enter*** on the keyboard or use the Tab keys to move to the next field. Shift ⇑ and Tab enables you to move back through the fields in case you need to make any changes.
- When you have entered all information the ***Verify*** button will be activated.
- Check the details entered with the caller and then click ***Verify*** to confirm the method of payment.



If the card has been cleared, the red cross will change to a ***green tick***.

If the card details have not been accepted an error message will be displayed:

- You will have to check the card details with the caller again.
- If the card can't be verified, they have to ask the caller for another credit card or another method of payment altogether.

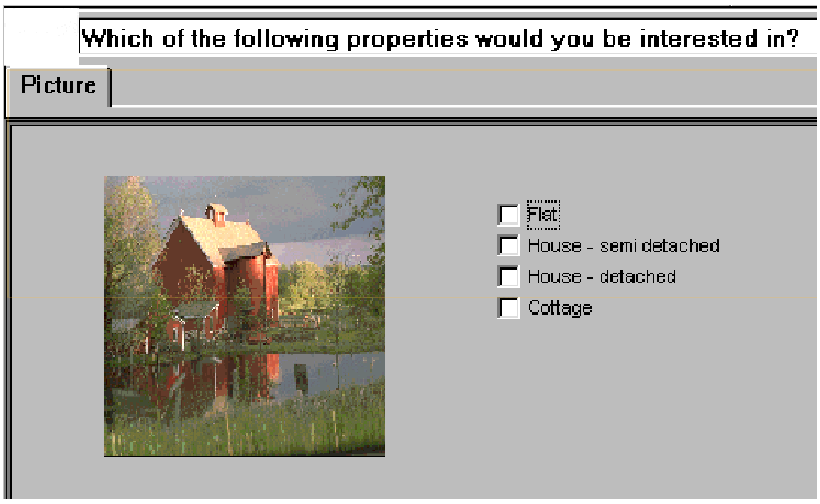
To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Picture Control

Using the *Noetica PictureX* control, JPEG, GIF, or PNG pictures can be displayed in a screen of your callflow.

If ***auto-skip*** has been enabled the picture will be displayed together with another control.

- If the auto-skip has not been enabled, you will initially only see the picture.
- The next control will be displayed, as soon as you press *Enter* on the keyboard.



To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

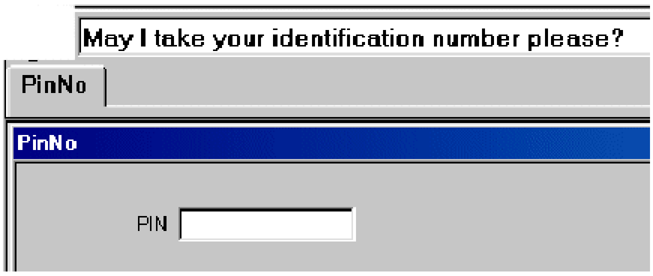
Pin

Noetica PIN Control is used for entry of personal identification numbers or the control can be configured to link to a particular campaign to filter out and display only details for a selected campaign in the Call Tracker.

For example, you may work on a campaign where a doctors or engineer phone in to collect messages.

When you reach the section with the Pin control:

- Take the doctors or engineers *Pin Number.*



- Continue the call, moving through the rest of the callflow, following the dialogue prompts.

When the call is completed the ***Call Tracker*** will open, displaying the active calls containing messages for the doctor or engineer.

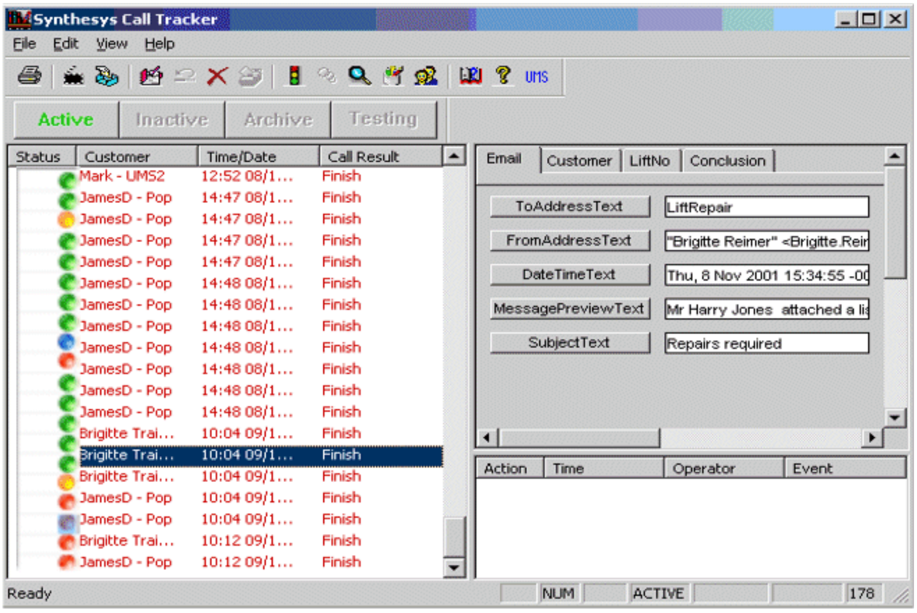
- Pass the messages on, as required.

Pop Watch

The *Pop Watch* control enables incoming emails to be inserted into the Call Tracker as a new call, based on the callflow that contains the *Pop Watch* control.

Incoming emails will be displayed in the *Call Tracker* as active calls, requiring action. An automatic reply regarding the receipt of the email can be sent out to the customer via a report.

- Open the *Synthesys Call Tracker* by clicking on the ***Call Tracker***  icon on the **Take Calls** toolbar.
- Selected a call, to display the relevant details in the right side of the window.



- *If Teams have been set up, only 50 incoming emails will be displayed as active calls at any one time.*

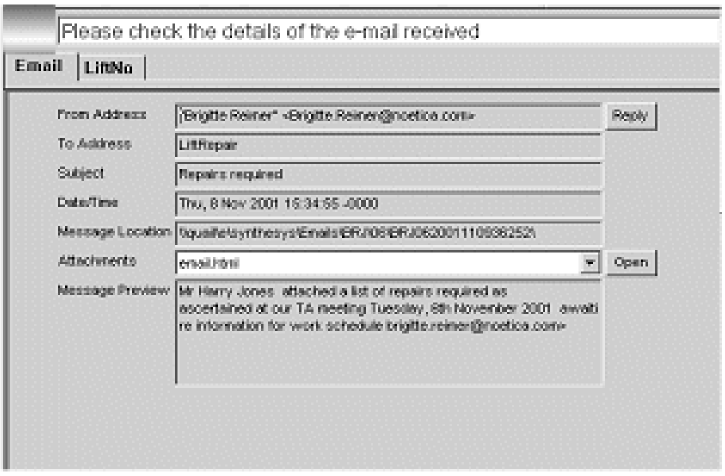
  Additional emails will initially have a queue status but will become active as soon as a space has been cleared via processing some of the actively displayed emails.

Please see next page for more information about dealing with an Email.

To access and deal with an Email:

- Click the Edit call  icon to open the callflow.

The Pop Watch control will be displayed, containing all relevant information about the email received.

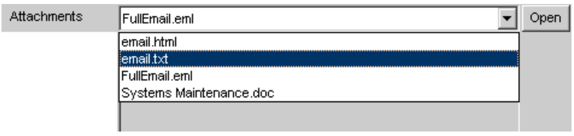


Click the ***Reply*** button to send an answer to the sender

Click the ***Open*** button to open you email and attachments

To open the email and attachments:

- Click the Open button of the 'Attachment' field.
- Using the drop down menu, either open your full email application and attachments or view the email in html or text format.



- To send a reply to the sender, click the REPLY button.

Move through the callflow, clicking the *Next Question* icon, or using *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

The callflow will guide the agents through the relevant sections and branches, allowing them to enter data about the email content.

Post Watch

The *Post Watch* control is designed to integrate the processing of incoming post and faxes as part of the agents' workflow, generating personalized replies as required.

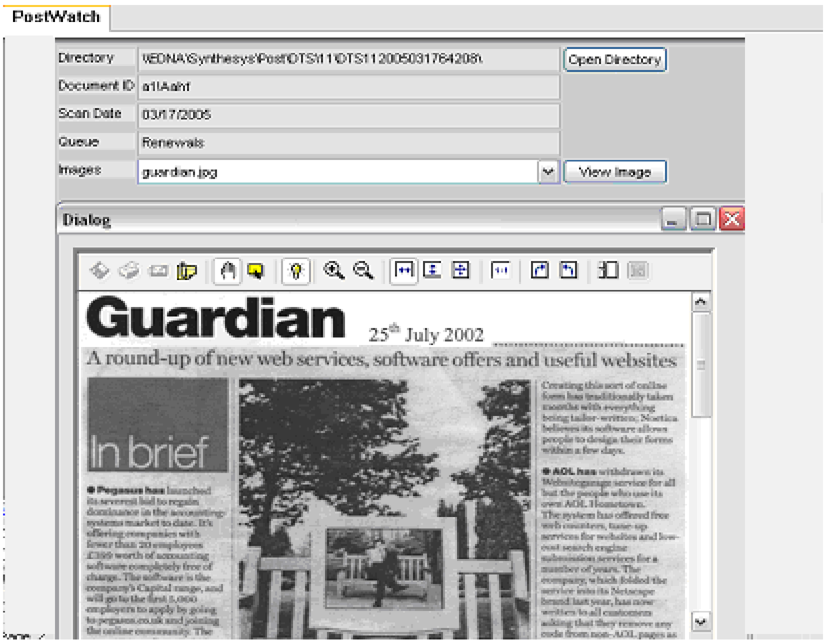
Post is initially scanned in using an external scanning system and then is placed as a workflow item in the *Call Tracker*, where it is queued and routed to the correct team, department or individual, ready to be processed.

To deal with an item of post:

- Open the *Synthesys Call Tracker* by clicking on the ***Call Tracker*** icon on the **Take Calls** toolbar.
- Selected an Email, to display the relevant details in the right side of the window.

To access and deal with the item of post:

- Click the Edit call icon to open the callflow.
- Click the ***Cancel*** button in the *Conclusion Text* window and select the ***Post Watch*** section, displaying the scanned in mail for you to read.



To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

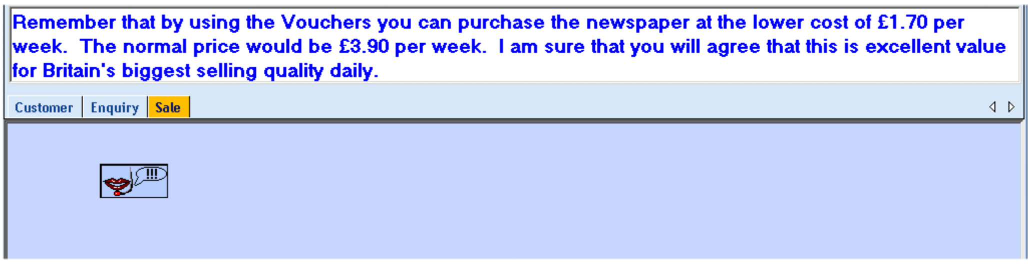
The callflow will guide you through the relevant sections and branches, allowing you to enter data about the email content.

Prompt

The Noetica Prompt control is a none-data capture control, used to prompt agent dialogue during a call.

When you reach the prompt control, no data needs to be captured. Simply take a look at the text, as it will include:

- The questions that you have to ask the caller or person called
- Information that you need to pass on to the caller or person called
- Prompts for you, containing, for example, instructions about the actions that you need to follow



To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Radio

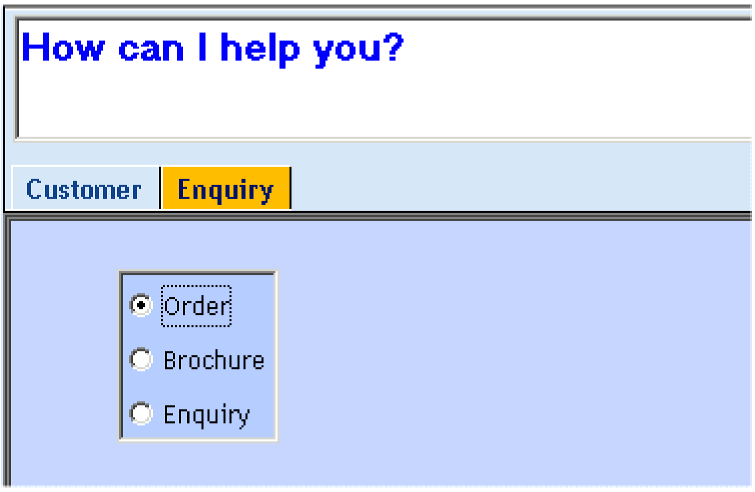
The *Noetica Radio* control allows you to make one selection from a number of choices available.

In our example, the caller can place an Order, request a brochure or phones in because of a general enquiry.

To make the required selection:

- Move your mouse pointer to the circle next to your caller's choice.
- Click the left mouse button.

A black dot will confirm the selection, i.e. ***Order***.



If a black dot is already displayed in the control, you can use the arrow keys on your keyboard to move up and down the choice buttons.

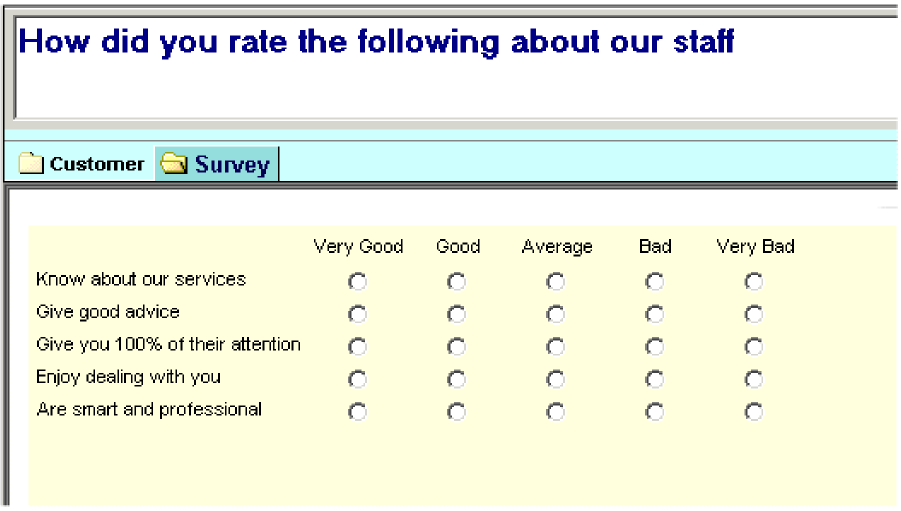
To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Survey Radio

The *Noetica Survey Radio* control is typically used to design survey questionnaires.

The control displays a range of survey questions and associated responses.

- In response to the caller's answers provided, select one option per question by clicking into the available Radio buttons.

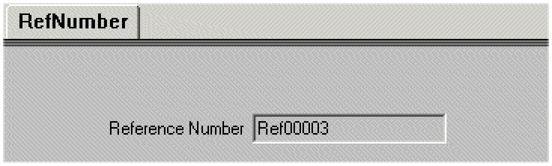


To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Reference Number

The Reference Number control automatically allocates a system-wide unique reference number.

When you reach the Reference Number control, the entry will automatically display the correct information and no action is required.



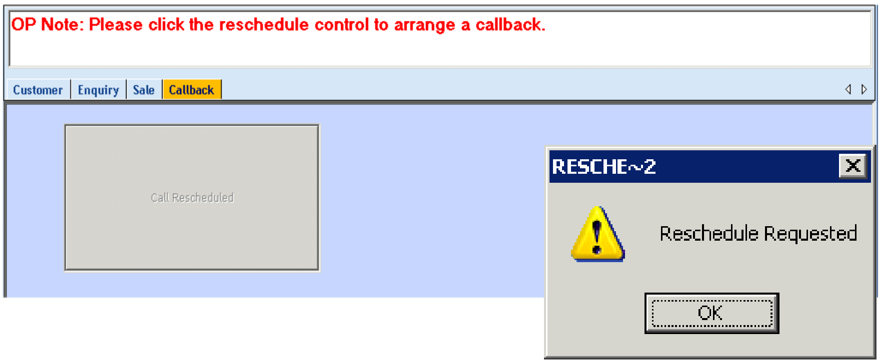
To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Reschedule Control

The *Noetica Reschedule* control allows calls to be scheduled for outbound calls. Depending on how the control has been configured, the call will be rescheduled with a specified default time or you can select the date and time from a diary page.

To reschedule the call with a default time:

- Click OK in the ***Reschedule Request*** dialog.
- Click ***Enter*** to move to the next page and finish the call.

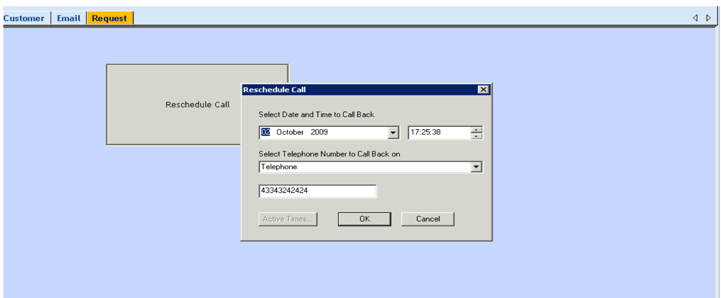


To reschedule the call using the ***Diary Page***:

- Open the drop down menu and select the required date from the diary page.
- Next, select the time for the callback.

If the Telephone option is enabled:

- Select the ***telephone type***, i.e. work or mobile and then enter the number on which to call the customer back.
- If the ***Active Times*** button is enabled, check the active time settings.
- Click the ***OK*** button to reschedule the call.



To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Symbol Table

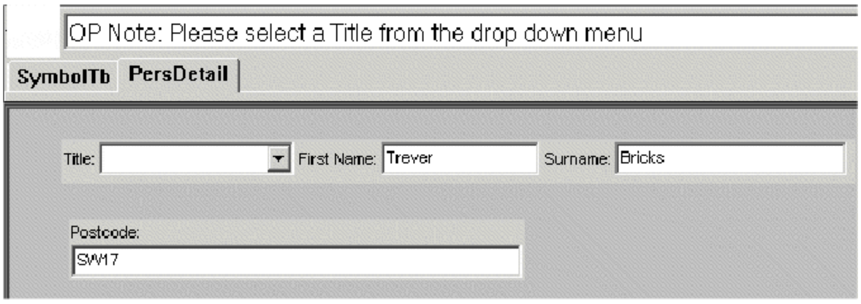
The *Noetica Symbol Table* control allows for data captured in a main callflow, i.e. callers name details and postcode, to be used within a pop flow. The Symbol table control itself is ‘invisible’ and does not display any information.

- Take a call as normal, collecting all relevant information.
- Skip the ‘invisible’ Symbol Table control pressing ***Enter*** on the keyboard.

The Pop flow will open automatically and again, you skip the Symbol Table control clicking Enter on the keyboard.

On reaching the next screen, in our example PersDetails, the customer First Name, Surname and Postcode collected in the main Callflow, are displayed automatically in the relevant controls.

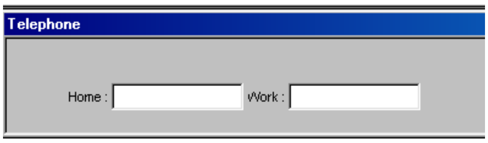
- In our example, all you would have to enter is the Title.



To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Telephone

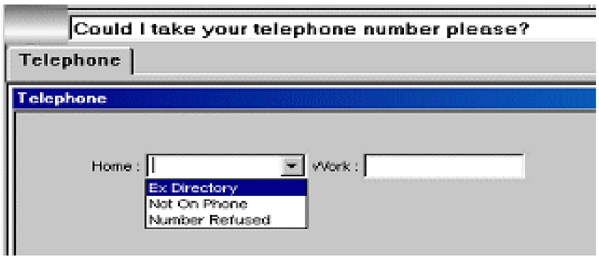
The *Noetica Telephone* control allows the capture of two telephone numbers.



The control can be configured to show a drop down menu, from which you can select a reason for not entering one or both of the numbers.

To select a reason:

- Click your left mouse button on the arrow of the box.



You can use your mouse pointer to move up and down the screen or you can use the arrow keys to the right of your keyboard.

- Use the Tab key ⇆ to move to the next field to enter the caller's second telephone number.
- Press Shift ⇑ and Tab to move back to the previous field again.

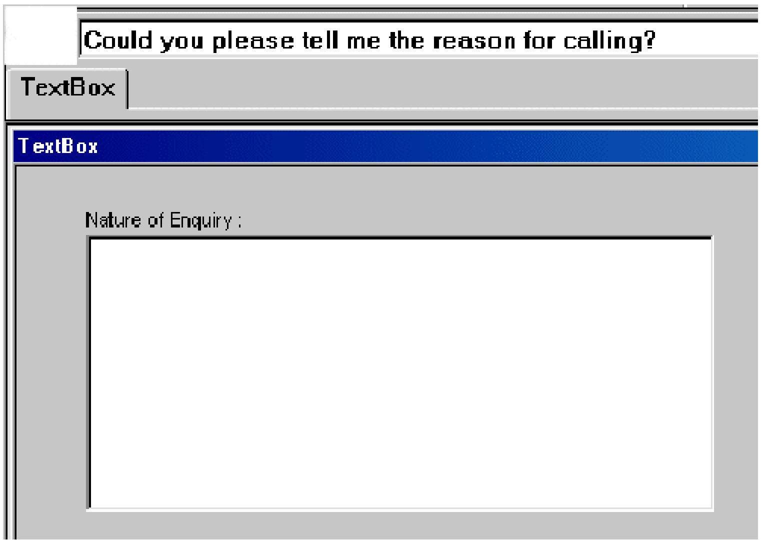
When you have entered the caller's telephone number(s) click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard, to move to the next screen.

Text Box

The *Noetica Text Box* control is used to enter of free format text, for example details of an enquiry or a query, or the reason for a call.

To enter the required text:

- Click the left mouse button into the ***Text*** control.
- Enter the required text or information.



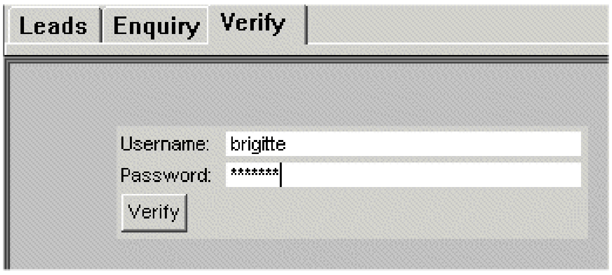
To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

Verify

The *Noetica Verify* control will stop you from progressing through a certain path in the callflow, until a supervisor enters a User ***name*** and ***Password*** into the verification control after confirming details, for example, of a sale.

After a valid user name and password have been entered:

- Click the ***Verify*** button, to continue and finish the call.
- If the user name and password entered for the Verify control are accepted, a message is displayed: '***Verification successful'***.
- If the user name and password entered are incorrect a message is displayed: '***Verification failed! Please check you username and password'***.



To move to the next screen click the *Next Question* icon, or use *Enter* or *Control (CTRL)* and *Enter* on your keyboard.

NOTES