SYNTHESYS.NET PORTAL

WEB BROWSER

SYNTHESYS.NET

Software Release Version 5.1

Document Version: 1.1

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Last updated August 2016

THE SYNTHESYS PORTAL

USER LOGIN

In order to run Synthesys Webflows, users need access to a Web Browser.

To access the Synthesys Portal to either your in-house server or an outside website, you need to enter the corresponding URL address into the Address field of the Web Browser.

The next step is to log on to the system.
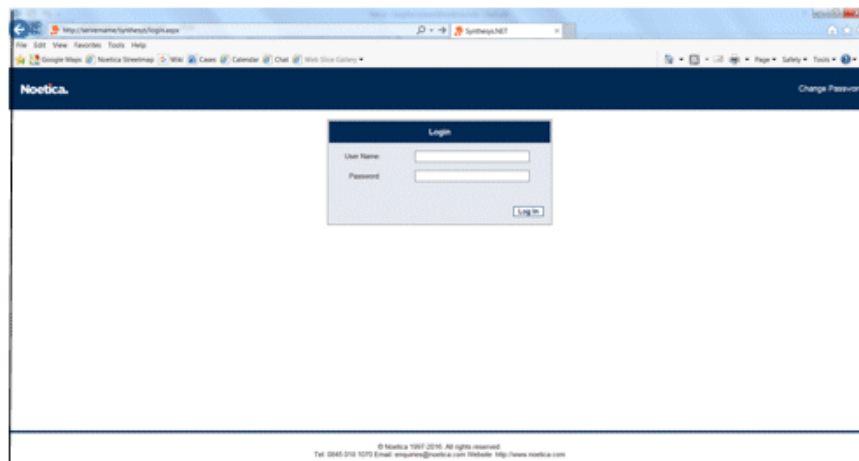
- Enter your *User Name* and *Password* exactly as they have been set for you.
- Next, enter the extension number assigned to your workstation. This is to confirm that you are available to receive and take calls, which can now be routed to your workstation.

If you have not received the required URL address or your User Name and Password, please contact your System Administrator.

If Active Directory Integrated Authentication is used, the Login dialog will be skipped, as the logon page automatically detects and authenticates the username from Windows.

If the CTI Login is not displayed, contact your System Administrator.

THE AGENT PORTAL SCREEN

Having logged into Synthesys, the Agent Portal screen is displayed.

The appearance of the screen can vary, displaying different branding images and background colours, reflecting, for example, the branding used by your company.

*If no Web parts are displayed when an Agent logs on for the first time, go to the **Settings** icon at the top right of the Portal screen.*

*Select the **Catalog** option to pick up the Webflow Launcher and other web parts. Access to the web parts will depend on the permission level assigned to you.*
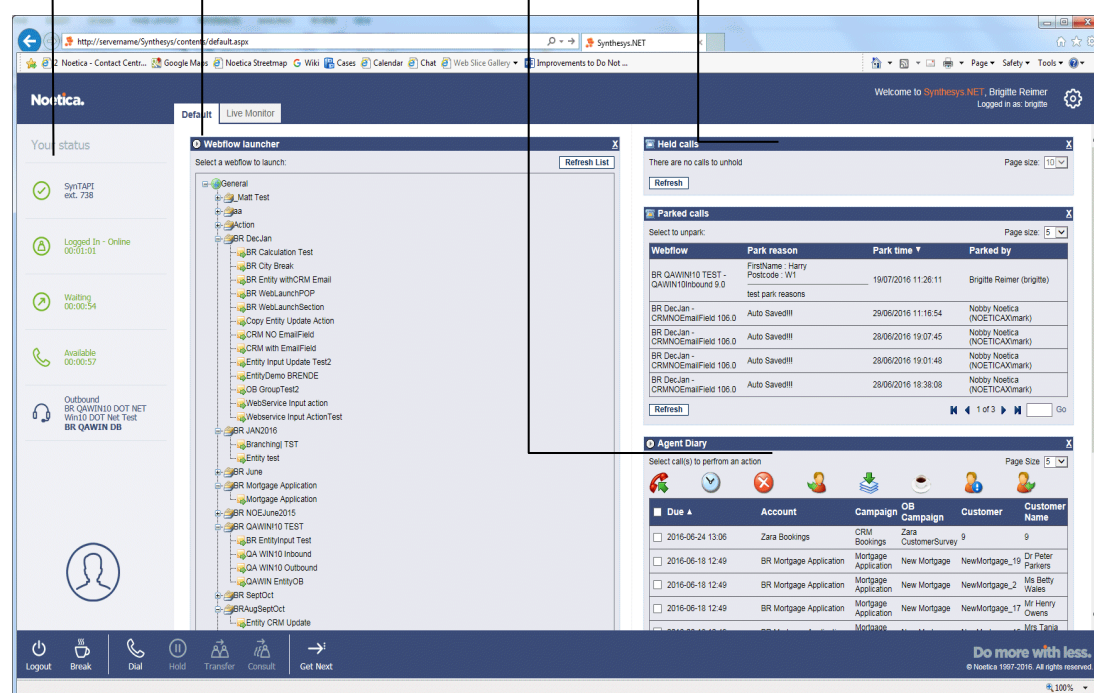
The Synthesys.Net Portal consists of the Agent Status bar, three main toolbars and a number of web parts, depending on the permissions assigned to the user.

Agent Status bar, showing Agent's log in status

Webflow launcher web part, for manually opening webflows

Hold & Park web parts for holding & parking calls

Agent Diary *for managing sleeping/ scheduled outbound calls*

The Portal toolbar, with Session control, Telephony & Work control toolbars

Please see next page for more information.

SYNTHESYS AGENT TOOLBARS AND STATUS BAR

The Synthesys.Net Portal consists of the Agent Status bar and three main toolbars:

- Agent Status bar
- Portal toolbar
- Webflow toolbar
- Transfer toolbar

Agent Status bar   Shows information regarding the Agent's log in status, and System, Dialler and Phone status. Most of the information is being obtained from the Live Monitor Service, reflecting information used in the 'Detailed Agent States' tab in the Live Monitor.

Portal toolbar   Consists of three CTI toolbars, Session control with log out and break buttons, Telephony toolbar with Dial, Hold and Transfer options, and Work control, for requesting the next record for a preview outbound call.

Webflow toolbar   Consists of the Session control & Telephony toolbars, a CRM section to enable agents to view customer profiles and histories, and a Webflow/Script Navigation toolbar for moving through the webflow, with Back, Next and Submit buttons, open Help page button, and Hold and Park calls buttons.

Transfer toolbar   The Transfer toolbar is displayed when an Agent initiates a transfer, consultation or conference call. In addition to the Session control, CRM and Webflow/Script Navigation toolbars, the telephony section of the Transfer toolbar includes Hang up, Swap Lines, Confirm, Transfer and Cancel buttons.

The next pages provide a detailed description of the Agent Status bar and toolbars available.

The Agent Status Bar

The Agent Status bar shows detailed information of the Agent currently logged into the Synthesys.Net Portal, including the General Status, System Status, Dialler Status, Phone Status and Blender Status.

> The Timer displayed shows the time in the current state and is re-set to zero, if the state changes. The exception is when agents go on Break. In this instance a zeroed timer will be displayed to show the length of time on break, but the logged in timer will continue to run hidden in the background, and show a continued count when the Agent comes off break.

Toolbar Icons	Description
General Status SynTAPI ext. 738	This is a summary of the system and dialler sections, and displays the Switch name in use and extension number. A green tick shows that CTI is available. A red cross shows that CTI is not available.
System Status Logged In - Online 00:00:13	A green icon is displayed if the Agent is logged in and working. A red icon is displayed to show, for example an error with the Portal Heartbeats or Pop Info requests. A break icon is displayed, when the Agent is on a break.
Dialler Status Waiting 00:00:08	Green shows the status of the PD, 'Available', 'Talking', Wrapping Up' etc. Red is displayed, for example, for states NotReady (On Break), NotAnswering, InboundOnly.
Phone Status Available 00:01:36	This shows the status of the Agent's extension. A green icon shows that the phone is available. A red icon shows that the phone is unavailable, it may be off hook or in-use.
Blender Status Outbound BR Mortgage Application Mortgage Application **New Mortgage**	Shows the Agent is working Inbound. Shows the Agent is working Outbound, displaying the current account, webflow and Outbound campaign name. If the Agent is assigned to an Outbound Group, the Group name is displayed, without the account & webflow name.
	Agent Profile. Placeholder to display Agent specific information. Not available in the current version of Synthesys.Net.

The Portal Toolbar

The toolbar in the Agent Portal consists of three CTI toolbars, Session control, Telephony and Work control.

Session   *Telephony*

Toolbar Icons	Description
Session Control	
	Log out. To log out of the Synthesys.Net Portal. **Pending**. Shows that logging off is in progress.
	Break. Opens the Break dialog, where the Agent can request a break, change the break reason while still on break, or return to work. Pending. Shows that the Agent is currently on a break.
Telephony	
	Dial. Will open the *Dial Number* dialog prompting for a number.
	Hangup. Allows the Agent to disconnect and end the current call.
	Hold. Holds the call only, the webflow will remain open. The Agent state in the Live Monitor will be 'Talking'.
	Transfer ("Blind" transfer). Opens the *Transfer call* dialog, prompting for a number. Transfers the current call to another agent or external number, without waiting for the recipient to answer.
	Consult. Opens the *Initiate consultation call* dialog, prompting for a number. Initiates a consultation call with another agent or external number, while putting the customer on hold.
	Conference. Opens the *Initiate conference call* dialog, prompting for a number. Initiates a conference call with another agent or external number, with all parties (customer, agent and third participant) on the phone, for example, to introduce the customer to the third participant, before transferring the call.
Work control	
	Get Next. Request the next record to work. At present only used for preview dialing.

The Webflow Toolbar

The Webflow toolbar is displayed when agents are in a webflow, and consists of the Session control, Telephony, CRM and Webflow/ Script Navigation toolbars.

Session	*Telephony*	*CRM*	*Script Navigation*

Toolbar Icons	Description
Session Control	Contains the same icons & functionality as described for the Portal toolbar.
Telephony	Contains the same icons & functionality as described for the Portal toolbar.

CRM

Contact. Displays customer details from the CRM/ Entity control.

History. Displays history events associated with the customer.

Notes. To view and add customer notes.

Webflow/ Script Navigation control

Help. Open the Web Help page assigned to the webflow.

Hold. Saves the webflow information collected and closes script. The Agent state in the Live Monitor will be 'Previewing'. Only the Agent who has put the webflow on hold can retrieve it again.

Park. Saves the information collected in a webflow and can be retrieved by any Agent with access to the Parked call list, when the customer phones back.

Abort. Cancel the session and close webflow without saving call data.

Back. Navigation button to move back to the previous page of the webflow.

Next. Navigation button to move forward to the next page of the webflow.

Submit. Finish the webflow and save details collected to the database.

The Transfer Toolbar

The Transfer toolbar is a sub toolbar to the Portal and Webflow toolbars. It is displayed when an Agent instigates a transfer, consultation or conference call.

When the transfer, consultation or conference call is initiated from within a webflow, the Transfer toolbar consists of a Session, Telephony, CRM and Webflow/ Script Navigation toolbar. If the transfer is initiated from the Agent Portal, the Transfer toolbar simply shows the Session control and Telephony sections.
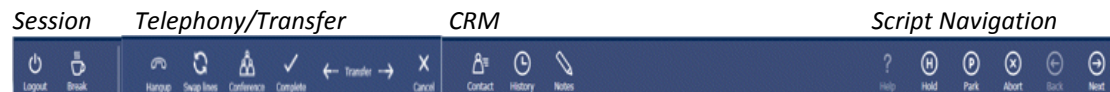
Session *Telephony/Transfer* *CRM* *Script Navigation*

Toolbar Icons	Description
Session Control	Contains the same icons & functionality as described for the Portal and Webflow toolbars.
CRM	Contains the same icons & functionality as described for the Webflow toolbar.
Script Navigation	Contains the same icons & functionality as described for the Webflow toolbar.

Telephony/Transfer

Swap Lines. Only available for consultation calls. Allows the Agent to alternate between the customer and the consultation call.

Clicking the Swap Lines button will automatically place the active consultation call on hold and activate the customer call. Clicking the Swap Lines button again will place the customer call on hold and activate the consultation call.

Hangup. To disconnect and end the current call.

Complete. Complete the Consultation or Conference call.
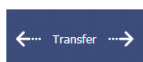
←Transfer→ Icon to show that a transfer is in progress.
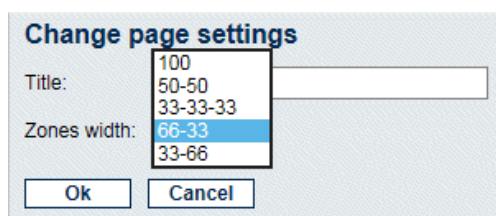
Cancel. Cancel the Consultation or Conference call.

PORTAL CONFIGURATION: PAGE LAYOUT

Clicking the **Settings** icon at the top right of the Portal screen you can change the Portal page settings, add Web parts (e.g. the Webflow Launcher, Live Monitor and Instant Messenger), set the Portal language and change your login password.

Changing Page Settings
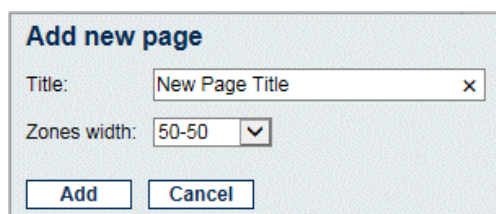
- Select the page that you wish to edit
- Go to the **Settings** ⚙ icon and select **Change page settings**.
- To rename the selected page, enter the new name into the **Title** field.
- To change the page size, use the **Zones width** drop down menu.
- Click *OK* to save the new settings, otherwise click the *Cancel* button.

Adding New Pages

- Go to the **Settings** ⚙ icon, select **Add new page**, then enter the page name into the *Title* field, and the page size via the **Zones width** drop down menu.
- Click *OK* to save the new settings, or else click the *Cancel* button.

Removing New Pages

- Select the page that you wish to remove.
- Go to the **Settings** ⚙ icon and select **Remove this page**.

PORTAL LANGUAGE: INTERNATIONALISATION

When running webflows in the Synthesys Portal, agents can set any language, as required, both for the Portal and specific webflows, thus displaying the Portal language and webflow information in any desired language.
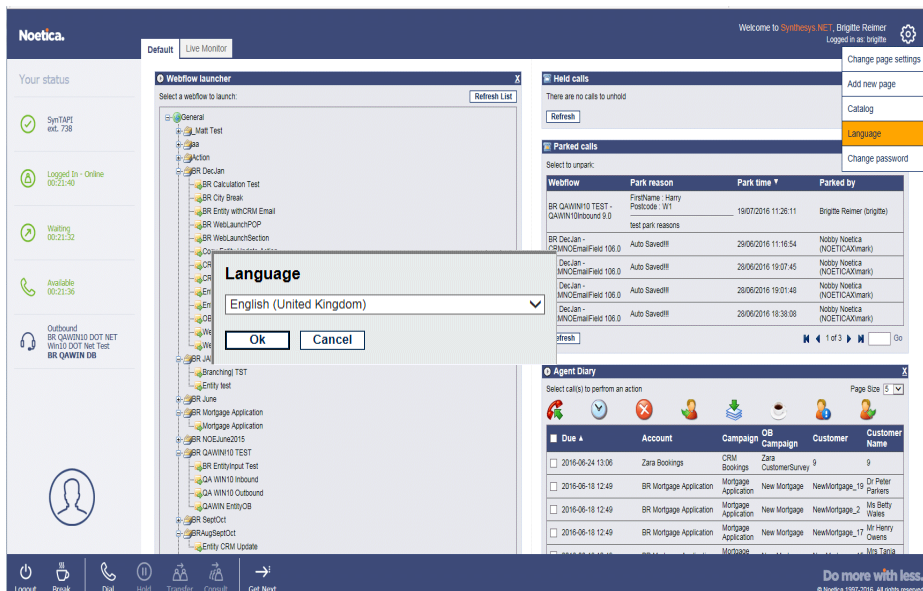
If no translation is available for the selected language, then the default language will be used in the Portal.

If no translation is available for the selected webflow, the default language of the Webflow will be used.

Setting the Portal Language

To set the language for the Synthesys Portal

- Go to the **Settings** ⚙ icon at the top right of the Portal screen and select *Language*.
- From the *Language* drop down list, select a language, as required.
- The language now used in the Portal will change accordingly.
- If no translation is available for the selected language, the default language will be used.

Changing Webflow Language

To set the language for the webflow

- Select the target language, as required, from the drop down list at the top right of the webflow screen.
- The language used in the webflow will change as soon as you press **Next>** or **<Previous** to navigate to the respective page in the webflow.
- Any webflow that is subsequently launched will attempt to run in the language the agent has selected.
- If no translation is available for the selected language, the default language of the webflow will be used.

AVAILABLE WEB PARTS

To add web parts to the Portal page, go to the **Settings** ⚙ icon at the top right of the Portal screen and select the **Catalog** option.

Please be aware that access to the individual web parts will depend on the permission level assigned to the user logged in to the Synthesys Portal.

Web Part	Description
Webflow Launcher	Access permission to the Webflow launcher enables users to select and run Webflows.
Held calls	Display a list of *Held* calls. Webflows can be put on hold with the call data collected and can be retrieved again by the agent who has originally put the call on hold.
Parked Calls	Display a list of Parked calls. Webflows can be parked with the call data collected. Any agent with access to the parked call list can retrieve parked Webflows and associated information.
Agent Diary	The Agent Call Diary displays a list of all sleeping and scheduled outbound calls that are assigned to the agent currently logged into the Synthesys Portal. The Agent can view associated CRM details, and manipulate the calls, e.g. select and handle a call immediately, or change the date and time for the callback.
Live Monitor - Queue States	Allows users to view, visually in a graph, the percentage of Queued, Sleeping Due, Sleeping Non Due, Scheduled, Scheduled, Complete or Running calls.
Live Monitor – Detailed Agent States	Allows users to view details of agents logged on to the Synthesys.Net Portal, switch information, extension number and detailed call statistics.
Instant Messenger	Enables users to send quick messages around the Contact Centre to users currently logged in to the Synthesys.Net Portal. Messages are stored in the Phoenix_Audit table.
Link Launcher	The Link Launcher Web Part allows users to open pre-defined links in a new window. Links can be represented as text, an image or both. The launcher can pass parameters to the opened window, either user provided or a selection of Synthesys variables. The links are defined in an XML configuration file.

For a more detailed description about the use of the available web parts, please see the document **Synthesys.Net Portal Web Parts**.

LAUNCHING A WEBFLOWS

Having logged into the Synthesys Portal via the Web Browser, the correct webflow is automatically launched when a call is routed through to your workstation.
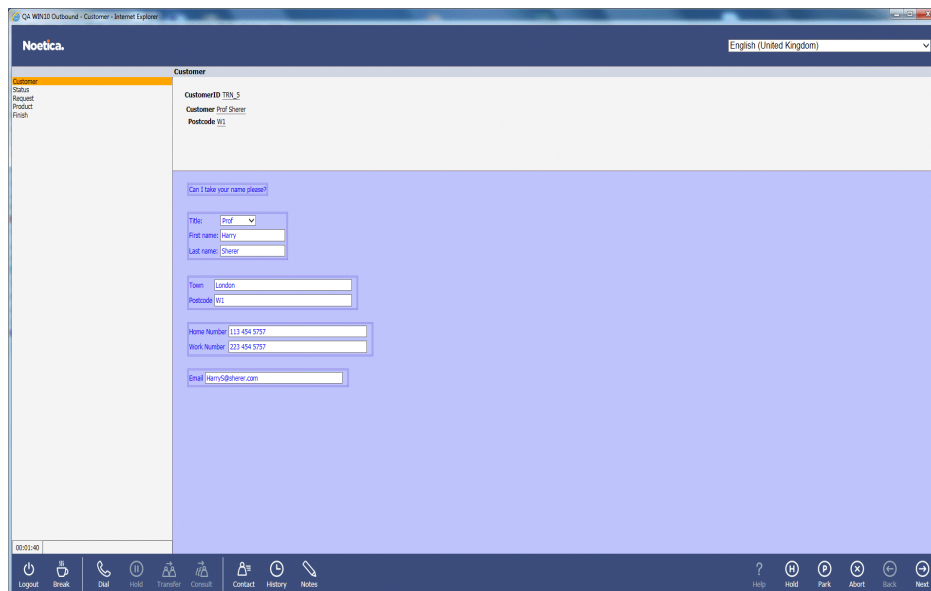
*For **Inbound calls**, the system launches the webflow by comparing the telephone number dialled with the DDI numbers stored against each released webflow.*

*When taking **Outbound calls**, the list of customers to be phoned will have been created by your Supervisor. The CRM record for the next call will pop automatically, if it is a predictive Outbound campaign, or if 'Idle Timeout' has been enabled for a preview Outbound campaign.*

To load the next record for a preview Outbound campaign manually:

- Agents must click the **Get Next** icon on the CTI toolbar.

*When an **Outbound campaign** is popped to the agent screen, customer details can be displayed in the relevant web controls on as part of the dashboard, if associated calculations and parameters have been created in the Synthesys Interaction Studio.*

The next page describes searching for customer details when taking Inbound calls.

Synthesys.Net Webflows

From the moment a campaign appears in the Synthesys Portal, until the call ends, you are presented with all the information they need to handle the call in a knowledgeable and professional manner.

The CRM/ Entity module is designed to allow access to customer profiles and histories, providing you with the best possible help in dealing with customers' queries and requests.

Each screen in the webflow contains questions, 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 recognize areas of a webflow that need special attention.

As each section is completed, the corresponding headings are added to the left-hand side of the screen, creating a summary of the call so far.

A mouse click on any one of these headings scrolls the relevant section back into view. This is useful when a caller decides to change an answer given to a previous question. For example, they may decide to ask for a brochure instead of placing an order. In this case, you can instantly return to the appropriate area of the webflow and make the necessary changes. All previous data that has been entered and is still relevant, is retained. Moving forward in the webflow, you are presented with the next logical question relevant to the amended data, enabling you to move through the webflow without ever having to input the same information twice.

WEBFLOW MAIN SCREEN

When a Webflow is launched, the first *Section of a* campaign is displayed together with the initial questions.

The way the Webflow information in each section is presented to the agent can be compared with the lay-out of a form. Each section, supported by text prompts in the agent's dialogue box, contains specific questions that need to be answered before moving to the next section.

In our example we have opened the Webflow for the 'City Breaks' campaign.

Section Area, with Section headings   Dashboard & Form Area   Language Selection

CTI Toolbars   Script Navigation Area
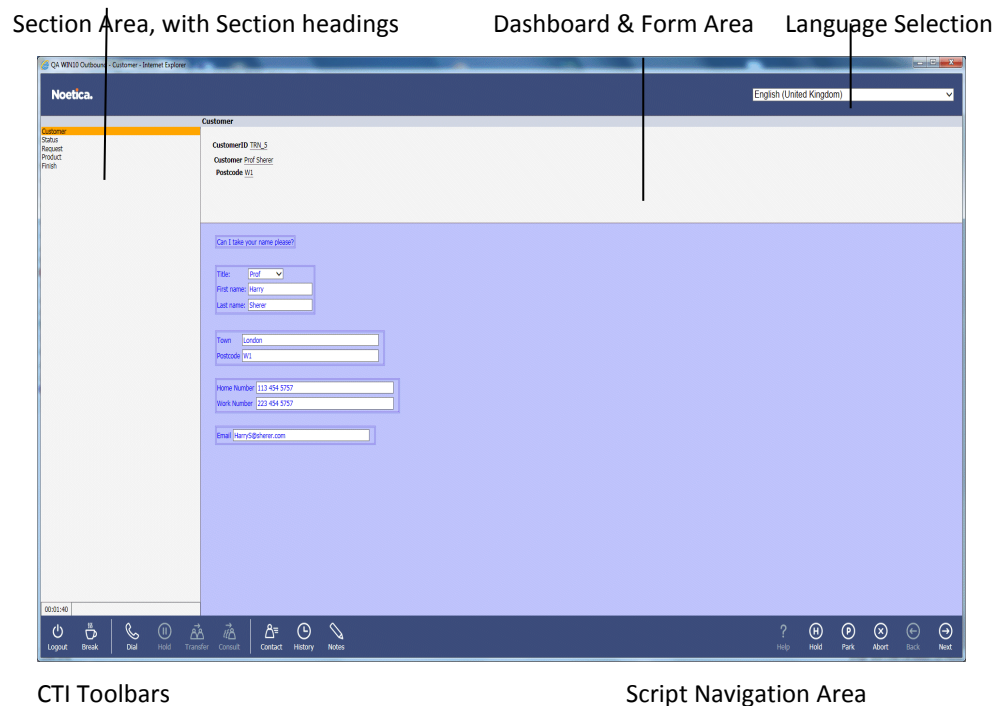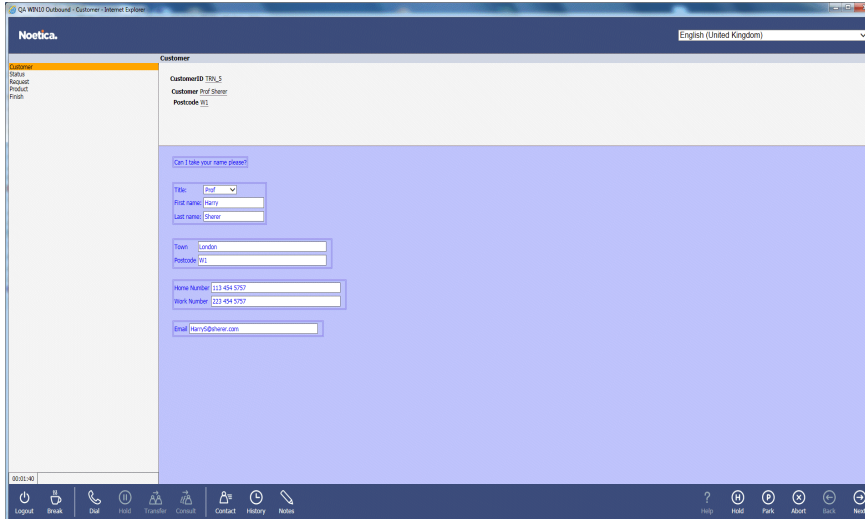
The Webflow consists of the following areas:

Section Area	*Displays the section headings of the Webflow*
Dashboard	*Customizable, displays at the top of the Webflow screen selected information from the CRM and Webflow sections*
Form Area	*Displays the questions and enables the agent or user to enter relevant information*
Language	*Allows selection of language from drop down list*
CTI Toolbars	*Includes Session and Telephony toolbars. It also show a CRM toolbar, if CRM/ Entity data is used.*
Navigation Area	*Enables agents and users to move through the Webflow*

AGENT DIALOGUE PROMPTS

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

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

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

Synthesys is easy to use and you can learn quickly how to handle a wide variety of calls.

VIEWING CUSTOMER INFORMATION

Customer Details

When using CRM/ Entity data, you can view customer profiles and histories and add notes for the selected customer using the **CRM** toolbar.
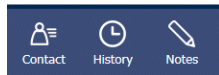
To view customer details, click the **Contact** icon on the *CRM* toolbar.

Customer Details

Customer ID	TestID_29
Title	Mrs
FirstName	Tanja
Surname	Grace
Home	11xxxxxxx001
Work	
Town	London
Postcode	SW18
Email	
DDI	

Close

Customer History

Clicking the **History** icon on the *CRM* toolbar, agents can view historical information associated with the customer record displayed.
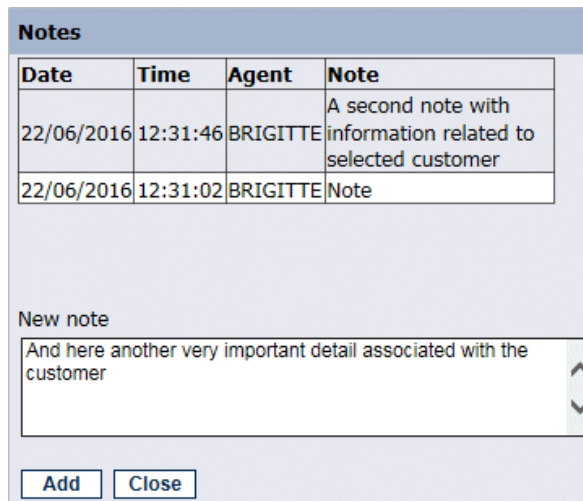
Customer History

EventID	Date	Time	Agent	Event	Details
535	22/06/2016	11:03:07	brigitte	Outbound Managed Change State	Call 58374 Changed State to Queued
516	14/06/2016	11:16:21	brigitte	Outbound Webflow [-] Aborted	Busy
472	09/06/2016	17:21:41	brigitte	CallSlept	
460	09/06/2016	17:20:37	brigitte	Call Queued	Call 58374 queued

Close

Adding and Viewing Notes

To add notes containing information associated with the selected customer:

- Click the *Notes* [Notes] icon on the *CRM* toolbar, or

- Select the **Add Note** option that forms part of the Entity control, if enabled at design time.
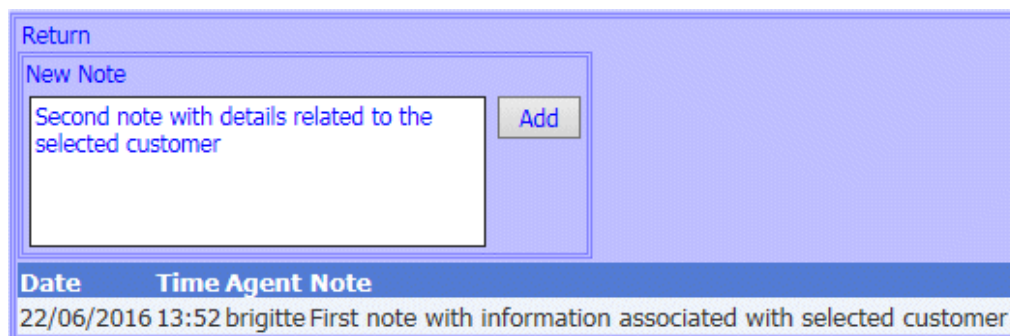
- Enter the required note or comments relevant to the selected customer into the **New note** text field.

- Click the *Add* button to add the message, and then click the **Close** button to return to the Entity control in your webflow.

- To view existing notes select the *Notes* icon, or **Add Note** in the Entity control.

- To add further notes, enter your message into the **New Note** text field, then click the **Add** button.

- Click the **Return** link, to go back to the Entity control in your webflow.

NAVIGATING THROUGH A WEBFLOW

To move through the Webflow, use the tab keys on your keyboard, or the **Next, Back** and **Submit** options on the **Navigation** toolbar at the bottom right of the screen.
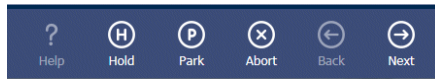
Moving between Sections

To move to the next section of the Webflow, click on **Next** at the bottom right of the **Navigation** toolbar, or press *Ctrl + Enter* on the keyboard to move to the next section.

To move back to the previous page of the webflow, click on **Back** .

Completing a Call
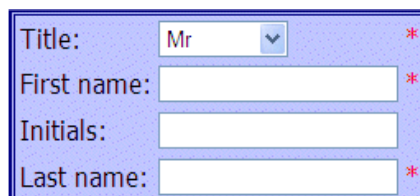
When you are in the last section of the webflow, the **Next** button will have changed to **Submit.** Click **Submit** to finish the call and submit the data collected to the database.

Moving between Questions

To move between questions within a section, press the *Tab* key on the keyboard.
To move backwards through these fields, press *Shift + Tab*.

Moving between Fields in a Question

Many of the *Web Controls* used within questions are made up of a number of fields, for example, the *Name Control* may contain 4 fields: *Title*, *First name, Initials* and *last name.*

To move forward between these fields, press the *Tab* key on your keyboard.
To move backwards through these fields, press *Shift + Tab*.
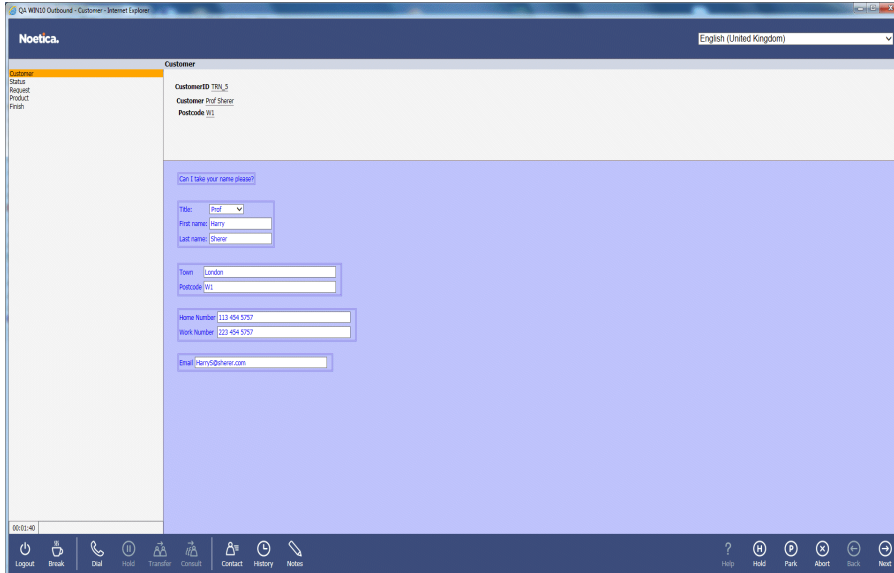
The stars indicate that these fields have been set to be compulsory in the **Validation page** of the control properties. Agents are required to enter details before they can move on.

Section Titles

As you progress through the Webflow, *Section Titles* will be displayed on the left hand side of the web page.

You can click on any section heading to display the questions associated with this section.

When moving backwards and forwards in the Webflow, all relevant information that you have entered will be retained.

Web Help Pages

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

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

Help pages can be connected to a companies' Intranet, i.e. their internal information network and to the Internet in which case agents can draw on information from the World Wide Web.

To launch an assigned *Web Help Page*, click on **Help** ![?Help] icon at the *Navigation* toolbar.
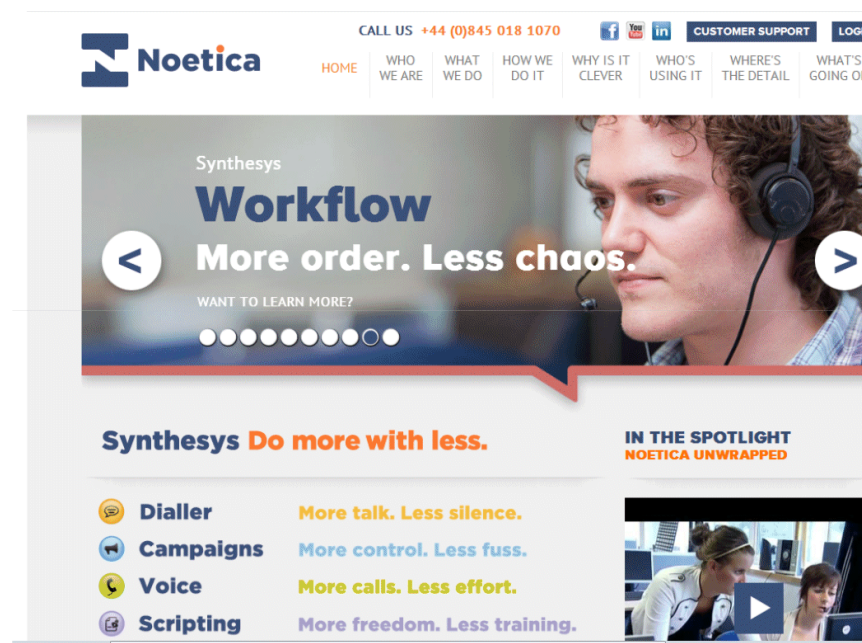
Holding and Parking Calls

Another feature of Synthesys is the ability to *Hold* or *Park* a call by clicking the park or hold option on the **Navigation** toolbar*.*

In Synthesys.Net a call can be put On Hold using the CTI toolbar or using the Hold option in the Webflow runner.

If On Hold is selected from the CTI Toolbar, the script will stay on when the call is held and the agent state in the Live Monitor will be Talking. The Hold time here is added as Talk Time in the Phoenix_CallTimes table.

If On Hold is selected in the Web Flow Runner, the script will close and the agent state in the Live Monitor will be Previewing. Hold time in this case is added as Preview Time in the Phoenix_CallTimes table.

Only the agent who has put the Webflow on hold can retrieve it again to access the information previously collected.

The script will close and the call is parked. Any agent with access to the *Parked Call* list can retrieve a parked Webflow and access the information previously collected.

Run parked or held calls
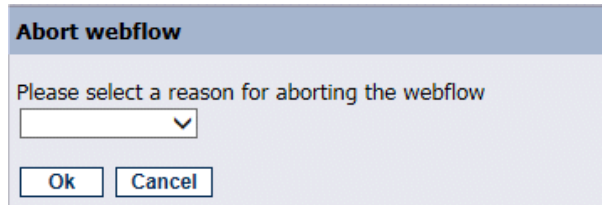
To retrieve a held or parked call to re-run the calls, click the left mouse button on the relevant Webflow.

All call data previously collected has been retained and agents can now take any further details as required, to complete the call.

Aborting Webflows
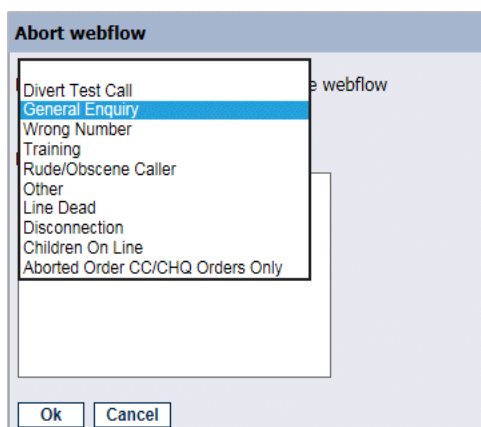
To exit your Webflow without saving the information entered

- Click the **Abort** [Abort icon] option on the *Navigation* toolbar, to open the 'Abort' window.

Abort webflow

Please select a reason for aborting the webflow

[dropdown]

[Ok] [Cancel]
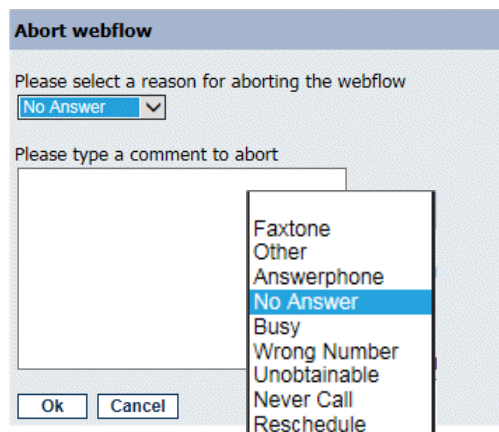
- Open the drop down menu and select the reason for aborting the call. If required, enter further information in the text box now displayed.
- Click '**OK**' to Abort the call.

Abort Options Inbound   *Abort Options Outbound*

Abort webflow

Divert Test Call
General Enquiry
Wrong Number
Training
Rude/Obscene Caller
Other
Line Dead
Disconnection
Children On Line
Aborted Order CC/CHQ Orders Only

[Ok] [Cancel]

Abort webflow

Please select a reason for aborting the webflow
No Answer

Please type a comment to abort

Faxtone
Other
Answerphone
No Answer
Busy
Wrong Number
Unobtainable
Never Call
Reschedule

[Ok] [Cancel]

Please note that the abort options available are different for Inbound and Outbound calls.

If you wish to return to the Webflow without aborting the call, click '**Cancel**'.

Reschedule and Special Reschedule

The Reschedule or Special Reschedule options are used when aborting a webflow to arrange a callback for a specified date and time:

- Click the Abort [Abort] option, and in the *Abort Webflow* dialog select **Reschedule** from the drop down list.

- Select **Special Reschedule (**or similar, depending on the entry in the *Outbound Abort Reason* section), to reschedule a partly completed webflow, retaining the information collected up to this point.

Next, specific the date, time and telephone number for the callback:

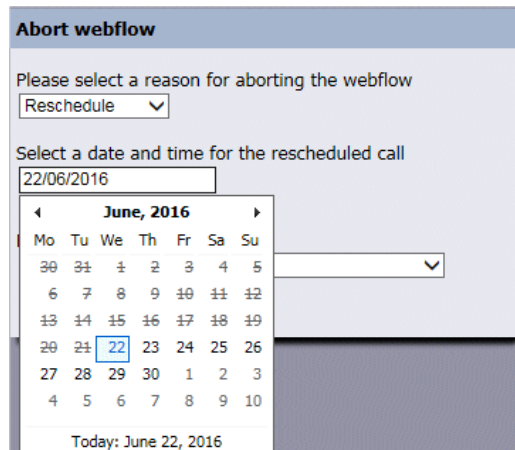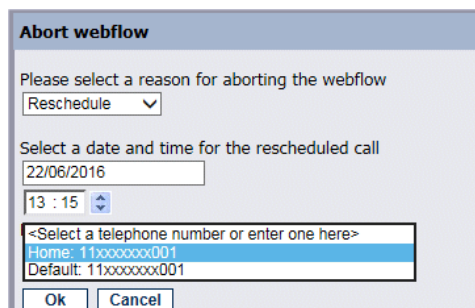- Click into the Date field and from the *Date Time Picker* page displayed, select the date for the callback.

- Then, specify the time for the callback.

Abort webflow

Please select a reason for aborting the webflow
Reschedule

Select a date and time for the rescheduled call
22/06/2016

◄		June, 2016				►
Mo	Tu	We	Th	Fr	Sa	Su
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

Today: June 22, 2016

The *Reschedule/ Special Reschedule* dialog, depending on the set-up, either simply displays the last number dialled or, if Reschedule Flags are enabled, allows you to select or enter a telephone number for the callback.

Abort webflow

Please select a reason for aborting the webflow
Reschedule

Select a date and time for the rescheduled call
22/06/2016

13 : 15

<Select a telephone number or enter one here>
Home: 11xxxxxx001
Default: 11xxxxxx001

Ok   Cancel

A webflow that was aborted using the special reschedule option, when re-presented to the agent, will open at the point at which it was rescheduled, still containing the details collected. Agents can finish the partially completed call, without having to re-enter information collected previously.

Going On Break

To notify the dialler that you wish to go on a break, use the Break option on the *Session* toolbar.

- Click the **Request a Break** icon on the *Session* toolbar*,* while still in a call.
- After you have completed or aborted the current call, the **On Break** dialog will open.
- If the *On Break Reason* function is enabled, select the reason for going on break from the drop down menu, before clicking **OK.**
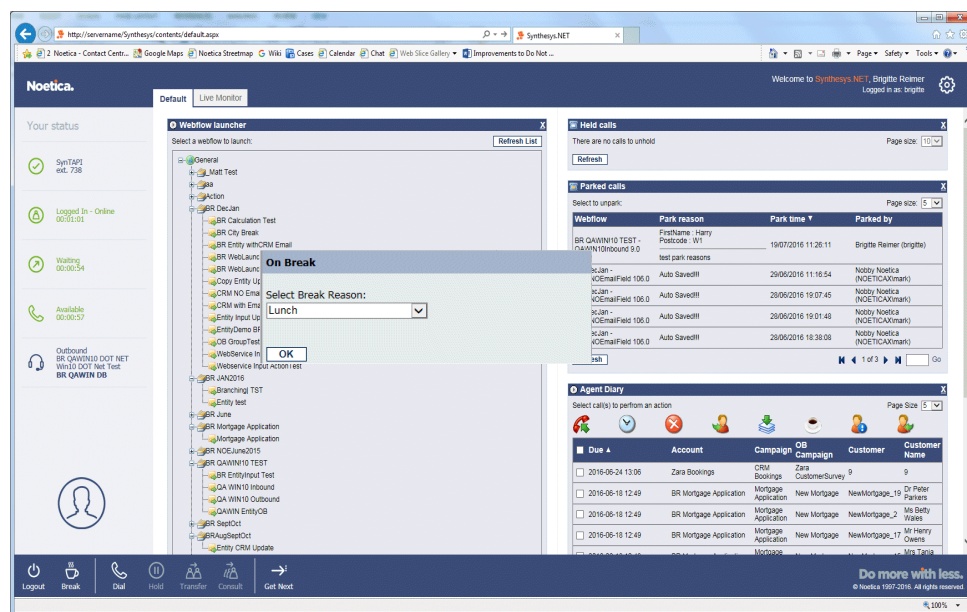
The **On Break** dialog will display the break reason selected, e.g. Lunch.

- Select **Return to Work,** to return to work at the end of your break.
- Select **Change Reason, to change the break reason selected,** while still on a break.
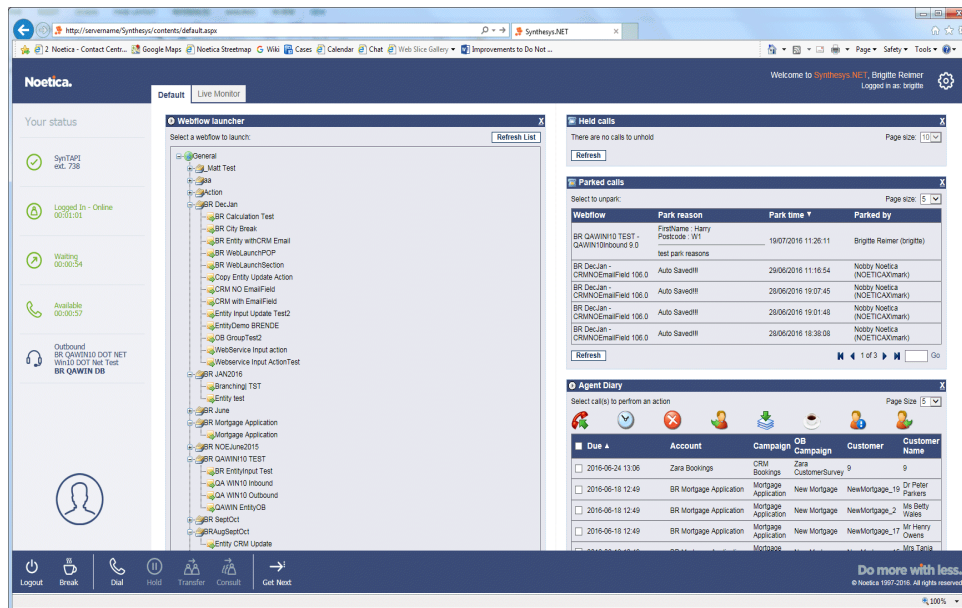- To log out of the Portal, select **Logout.**
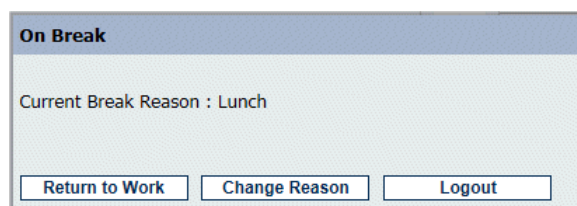
USER LOGOUT

To log out of the Synthesys PD properly, click the **Logout** option on the *Session* toolbar.

- Click the **Logout** [Logout] icon on the Portal or Webflow toolbar

- The **Pending** [Pending] icon is displayed while the PD processes the user logout request.

- When the PD logout is complete, the *Login* dialog will be displayed. You can now either log back in again, or exit the Web Browser.