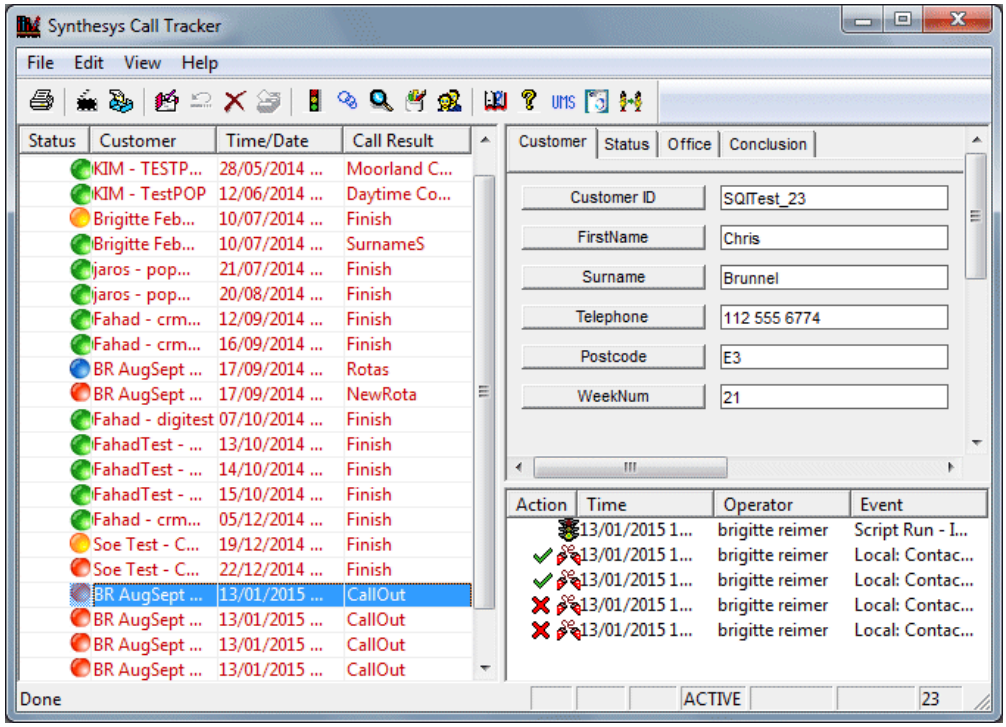
AGENT VIEW

The Call Tracker – Synthesys Workflow



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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 They are no longer active, yet the call has not been archived.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.

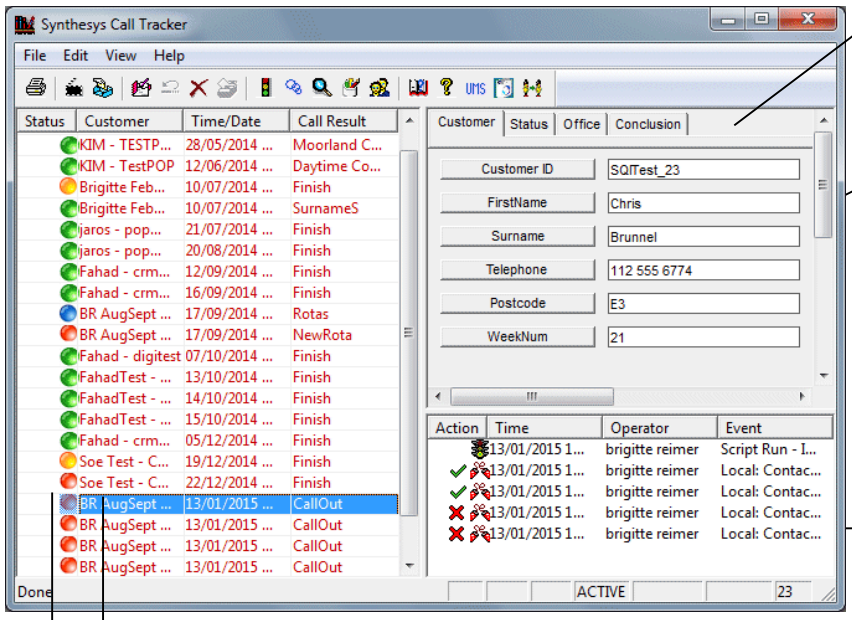
Call tracking allows existing data in the database to be retrieved, viewed and amended if and when necessary and the Call Tracker can be used to follow up and monitor calls that have been taken.

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



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

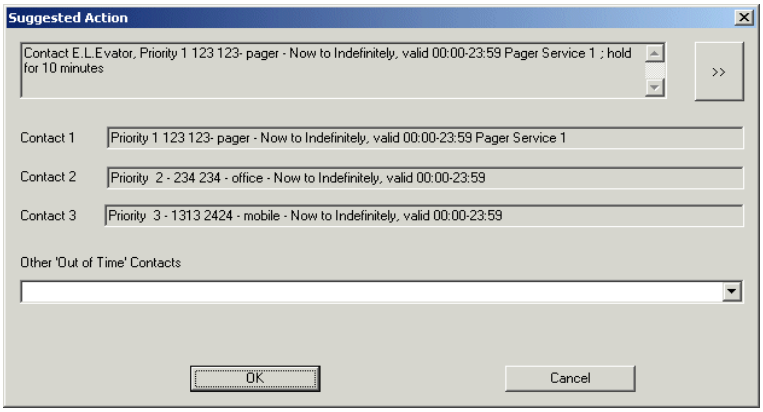
Button	Used To
	Print: Print the details of the currently selected call.
	Add Action: Add an action to the currently selected call.
	File/Archive a Call: Quick way of Archiving a call. Active calls can be archived immediately, without having inactive status first.
	Add a Note: Add a note to the call 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

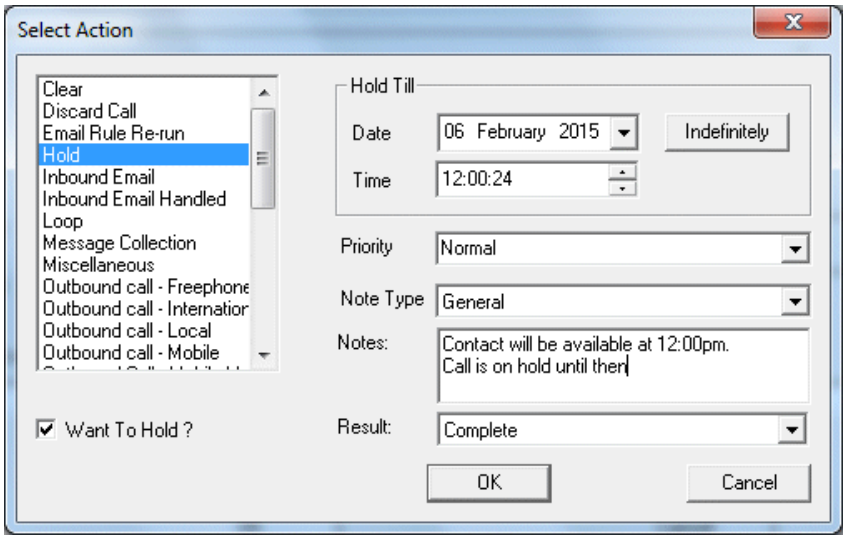
The ***Suggested Action*** window will open, showing the next logical action that should be taken for the call in question:



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.



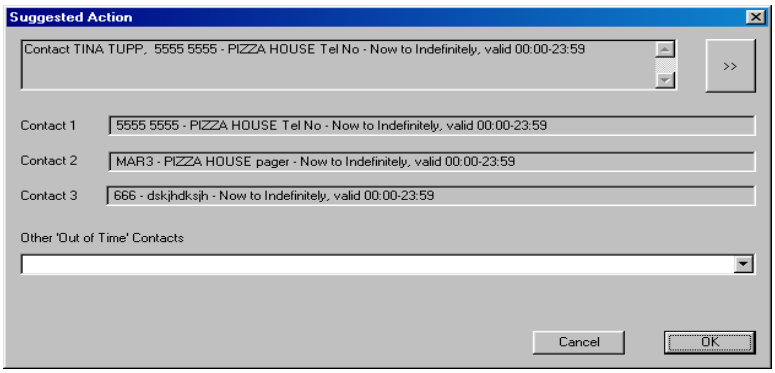
The **Priority** field indicates the importance assigned to the action.

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

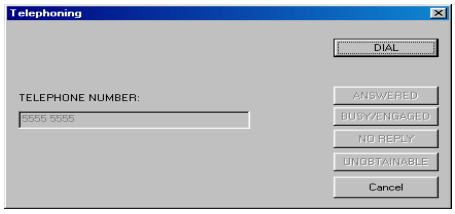
The **Notes** box can be used to record any relevant commends associated with the action or note type.

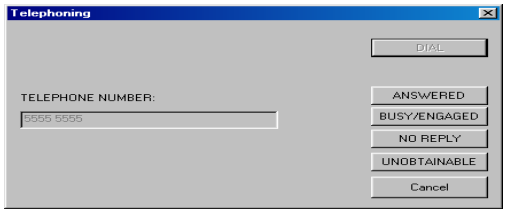
Automated Dialling

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



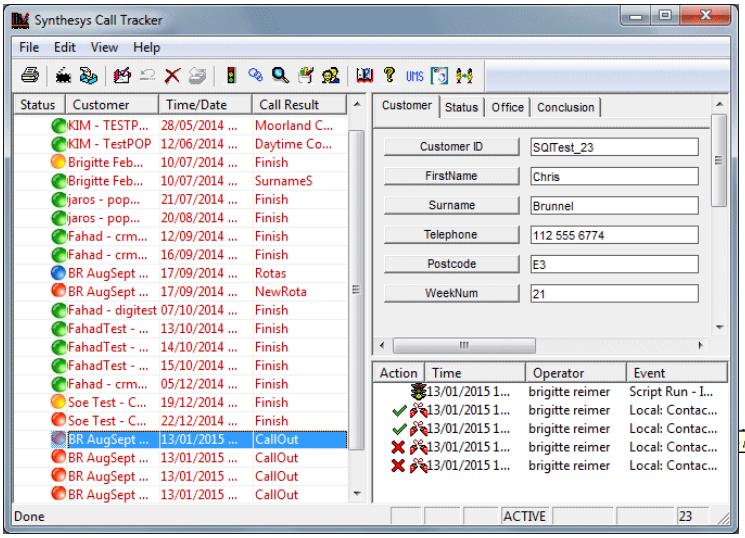
- The ***Telephoning*** window will open with the number to be dialled displayed.
- Click the ***Dial*** button to dial the number shown.
- If the person to be contacted answers the phone, click the **Answered** button.
- If not, select one of the available options, as appropriate: **Busy/Engaged, No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



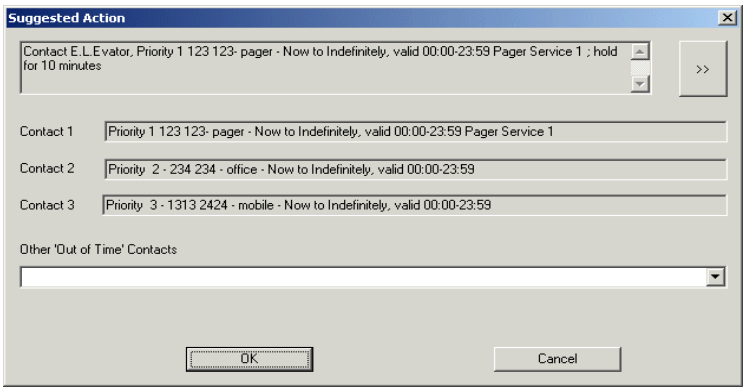
Green tick: action completed successfully.
Red tick: action was unsuccessful and further actions are required.
Blue arrow: message has been sent to pager service provider.

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

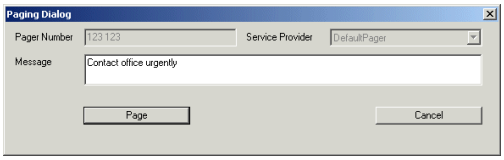
Coloured icons show the priority level for the callout: Green=Normal, Blue=Priority, Amber=Urgent, Red=Panic

Automated Paging

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



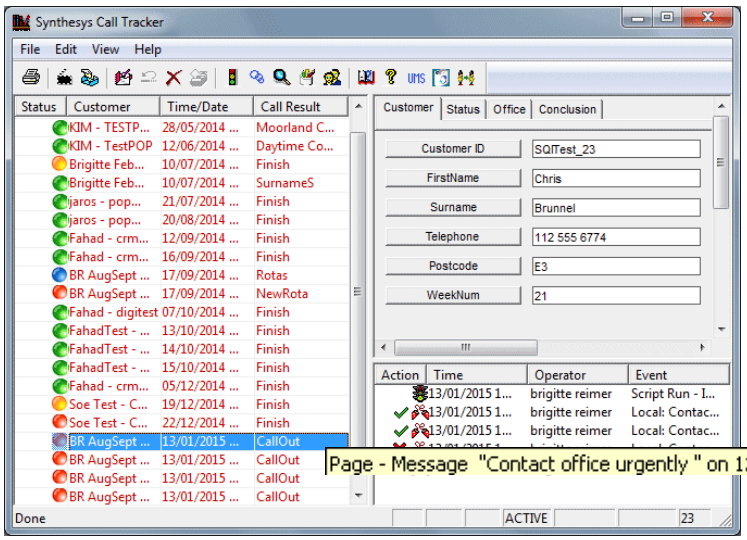
The Paging window will be displayed containing the pager number and service.



- 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.

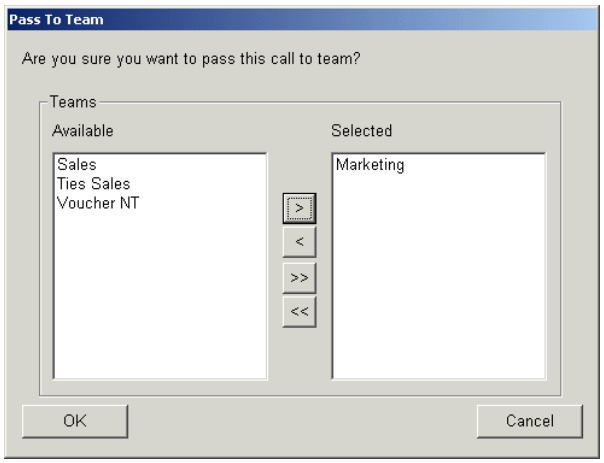


Coloured icons display the priority level for the callout: Green=Normal, Blue=Priority, Amber=Urgent, Red=Panic

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.

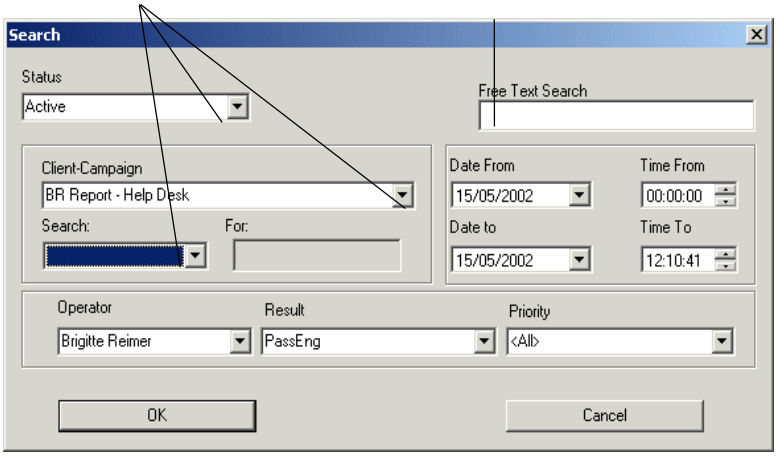
The Search Facility

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.



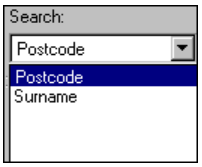
A date/ time range for the search can be entered here.

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

Searchable Fields

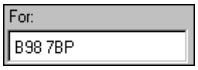
Searchable fields are defined as part of the callflow design to allow the search for entries made into specific fields within a callflow for example a caller's surname or a postcode.

- 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.

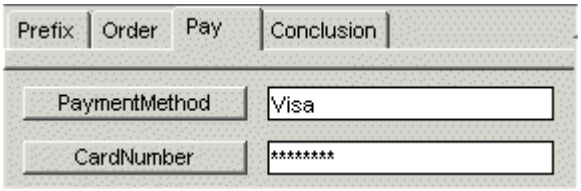


In the example we search for a specific postcode in the *Postcode* field to retrieve calls with a postcode of B98 7BP.

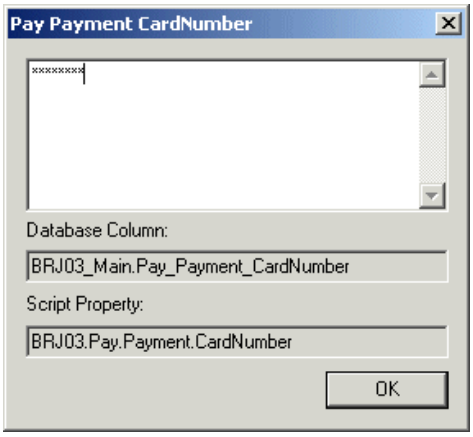
Hidden Fields

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

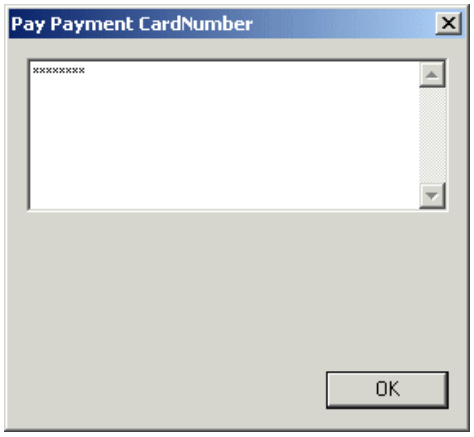
In our example, the credit card number is hidden from view.



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.

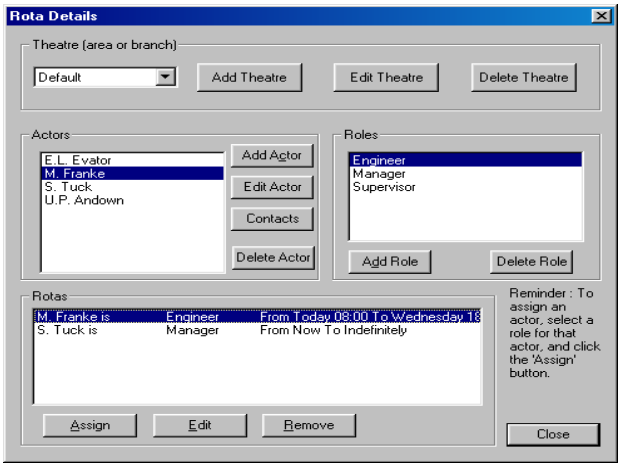
Rota:	Company employee work roster.
Actor:	The different individual employee's within a firm/company.
Role:	The positions of employment held by certain individuals within a company. Every actor must be assigned a role.
Theatre:	A branch/area. A Company may have several of these, all of which need to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

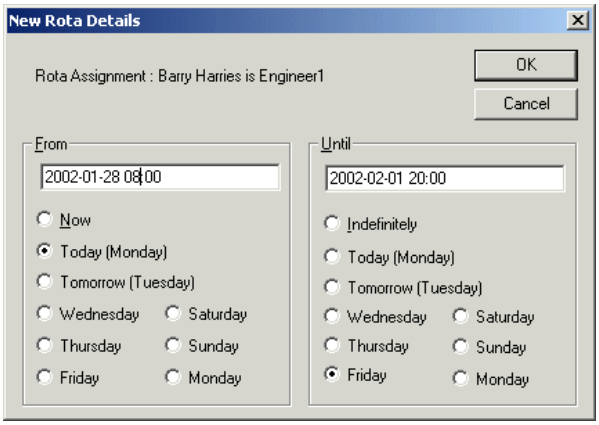
In the *Rota Details* window now displayed:

- 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.



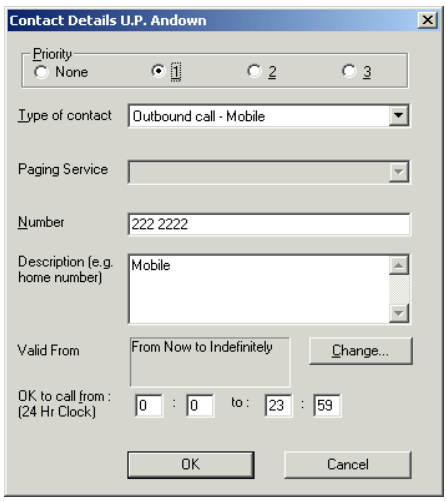
The information 'M. Franke is Engineer from Today 08:00 to Wednesday 18:00' has been entered in the 'Rotas' section.

- 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.