THE CALL TRACKER
Synthesys Workflow

THE CALL TRACKER (Synthesys Workflow)

Introduction

The essence of call tracking is to allow existing data on the database to be retrieved, viewed and amended if and when necessary. Once a call has been taken in the *Agent Workstation*, what happens to it next depends on the type of call.

Some calls that are handled may just need reports produced about them, whereas other calls may require further action to be taken. Such actions may include contacting an engineer to go out on a site visit, or requesting a Help Desk Specialist to take over the call to solve an outstanding support problem.

The *Call Tracker* is used to follow up and monitor calls that have been taken. Viewing the details of outstanding calls, call centre supervisors can allocate appropriate staff to deal with the problems reported, for example sending out technical specialists.

Call Tracker and On-site Service Calls

The *Call Tracker* facilitates the handling of a sequence of actions that are required to complete and clear a call. For example, a customer may place a call for an engineer to come out on site. Before this call can be cleared, a series of actions must take place, such as:

- Page the engineer.

- Pass call details to the engineer.

- Wait for the engineer to confirm that the call has been cleared.

The *Call Tracker* provides you with intelligent advice regarding the next appropriate action(s) 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.

At all times you take the final decision as to whether to accept the preferred option, or choose one of the alternatives. For example, if the engineer is paged, but does not respond within a predefined time, *Synthesys* will advise you of the next course of action. This may be to simply page the engineer again, or to escalate the call to the engineer's manager.

Call Tracker and Outstanding Help Desk Calls

The *Call Tracker* provides an instant view of all active calls and therefore aids the deployment of specialist staff to resolve outstanding issues.

If, after working through a callflow, you are unable to resolve the caller's problem, the call remains active on the system. This outstanding call can be viewed and retrieved by a specialist, who can view the history of any actions taken and rerun the original callflow to view the answers that were provided by the caller.

Every action is logged on the system and is stored against the call record. This call history can be viewed at any time allowing anyone to be able to progress the call effectively. For example, should a customer telephone to see if an engineer is being sent out on site, you could access the call details, view the call history and offer an appropriate response.

TACT and Synthesys Workflow

The *Teams Augmented Call Tracker* provides the functionality of filtering active calls according to teams. Agents thus will only handle calls from campaigns assigned to their team.

TACT is also the start to a workflow system as calls can be moved between teams using the 'Pass to Team' action. An agent taking an Inbound call can pass the callflow containing all call details to the sales team, who can pass it to the accounts department who in turn pass it on, to be dispatched.

Unified Messaging Service (UMS)

The Unified Messaging Service (UMS) allows agents to automatically send a message to several customers by various methods, for example via pager, fax, SMS and e-mail.

The UMS can be set up as part of the Callflow, in which case the messages will be send to customers listed in an address book on completion of taking a call or alternatively UMS can be used in the Call Tracker, sending messages to customers using the address book or sending Instant Messages to persons not included in the address book.

To set up the UMS, we use two ActiveX controls, one control contains the message text box and the other maintains the UMS address books. Additional services in the Synthesys Control Programme facilitate each required method of messaging.

QUICK REFERENCE GUIDE

A call can be in any one of five states: Active, Inactive, Archive, Testing or Discarded.

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 finalised). 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 on the database to be retrieved, viewed and amended if and when necessary. The *Call Tracker* can be used by Agents to follow up and monitor calls that have been taken.

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

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 office. A Company may have several of Theatres, for example different area offices, all of which need to be incorporated into the follow-up Callflow. Every branch will have different rotas, actors and roles.
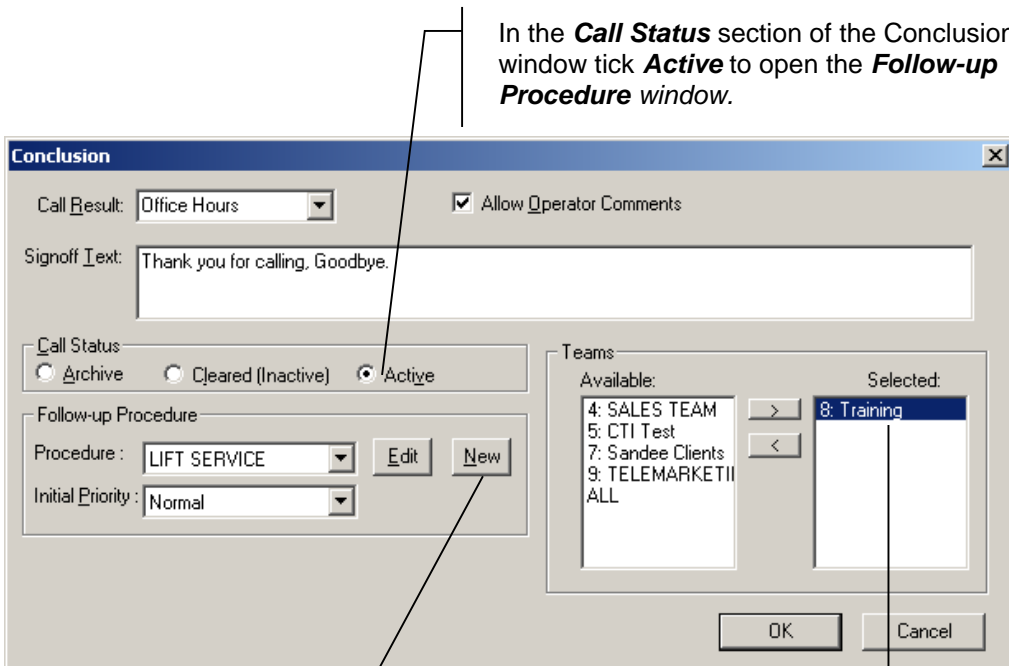
Theatres can only be used in conjunction with either the DB Table control or the Theatre Allocation control.

SETTING UP FOLLOW-UP PROCEDURES

This section will guide you through the process of setting up a *Follow-up Callflow* and creating escalation procedures, adding employees, their position in the company, contact numbers and work rosters.

To set up the Follow-up Procedure:

- Go to *Campaigns* under the **Setup** heading of the Synthesys main screen and open the callflow to be used for the escalation procedure.

- Double-click the chequered flag *Finish* to open the *Conclusion* window.

- Change the default *Call Status* from Archive to *Active* to activate the Follow-up Procedure dialog.

- Click the *New* button and enter a descriptive name in the dialog displayed.

In the *Call Status* section of the Conclusion window tick *Active* to open the *Follow-up Procedure* window.

Click *New* and enter a name for the Follow-up Procedure in the window displayed.

Select the relevant team(s) if you wish the calls to be handled by specific agents only.

The Teams and the agents belonging to a team need to be set up in the Synthesys **Teams** module.

Next you need to create *Rota Tables*, so that you can set up the work roster for the employees of the Lift Repair Service.

Creating or Selecting Rota Tables

The window now displayed shows the name that was entered for the follow-up procedure, in our example *LIFT SERVICE* - Callflow Editor.
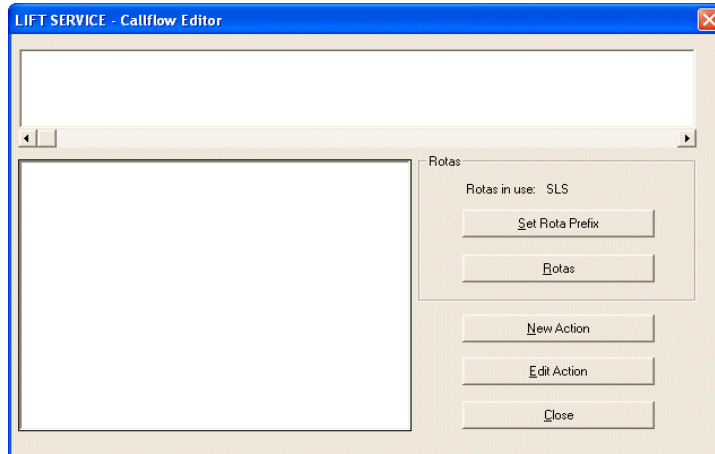
- Click the **Set Rota Prefix** button to display the Rota Picker window.

- The drop down menu contains a list of existing Rota prefixes.

- To add a new rota prefix, click the **Add New Rota** button.
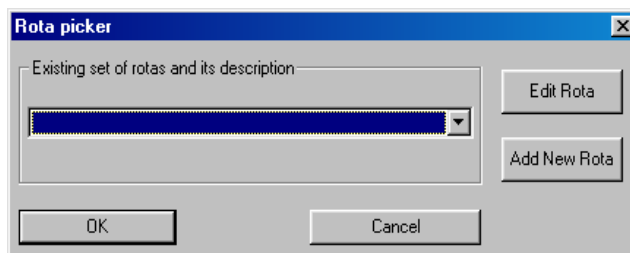
- Into the *Edit/ Add Rota* dialog, enter a Rota prefix/ name containing up to 5 characters, beginning with a letter.

- Add a brief description, i.e. the name of the account for the Rota details.

Click OK to return to the *Rota Picker* window. Wait for your details to appear and click OK to return to the *LIFT SERVICE* follow up window to enter contact details.

Entering Contact Details

In the *LIFT SERVICE* follow up window, click the **Rotas** button to open the *Rota Details* window.

- Click the **Add Actor** button, to add the names of the employees, leaving the *Contact* field blank.

- Next, select **Add Role** to add the employee's position in the company, for example Engineer1, Engineer2 and Manager and click OK.
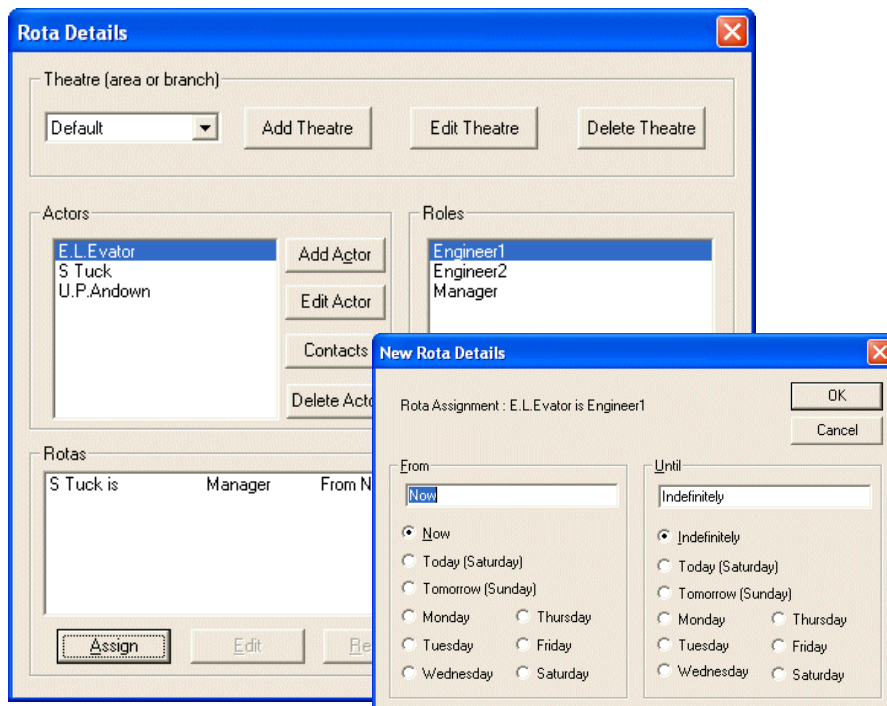
Now assign each employee/ actor a role and work rosters:

- Select an employee**,** i.e. S.Tuck from the **Actor** section and a role, i.e. **Manager** from the **Role** section.

- Click the **Assign** button now activated to open the *New Rota Details* window.

- Assign the rota from **From Now to Indefinitely** and click OK.

- The information **S. Tuck is Manager From Now to Indefinitely** has been entered in the *Rotas* section.

- Assign the other two employees the role of *Engineer1* and *Engineer2,* also from 'Now to Indefinitely.

Next, allocate the contact numbers for the individual actors.

Firstly, we assign the contact numbers for the manager:

- Select the manager S.Tuck in the **Actors** section.

- Click the **Contacts** button to open the *Contacts For* dialogue and **New** to open the **Contact Details** window*.*
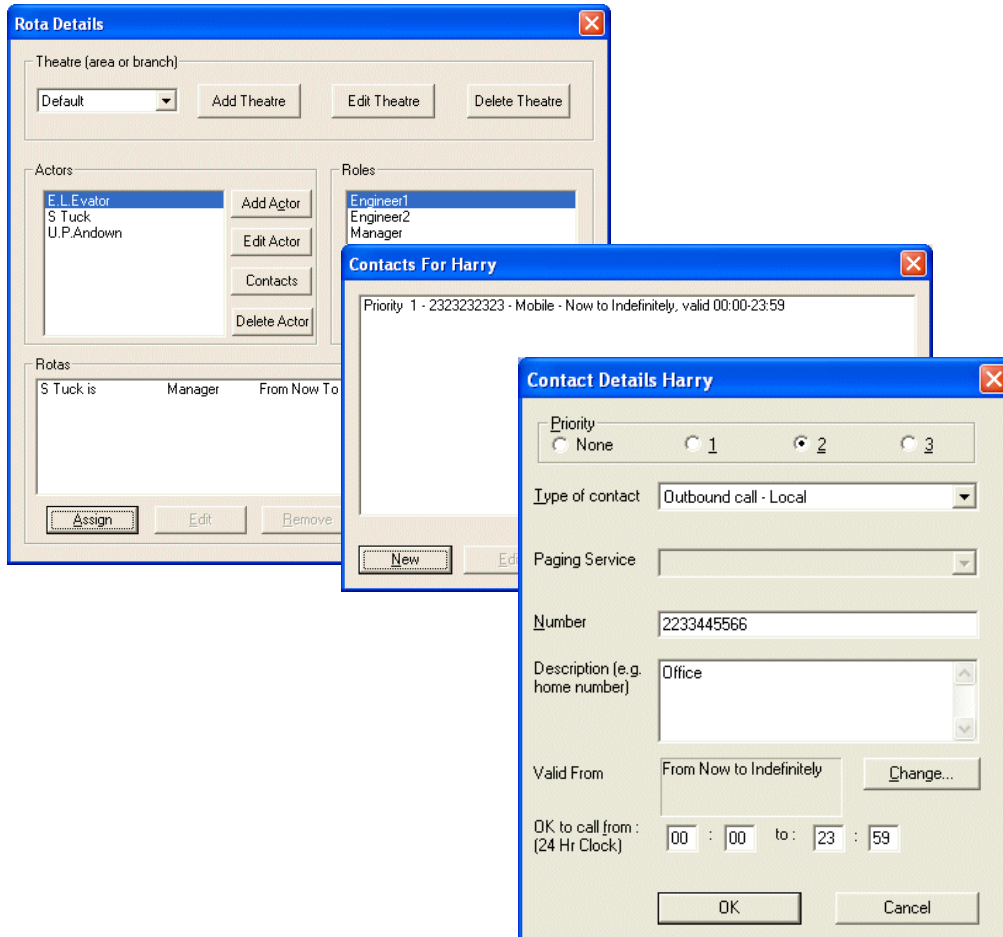
- Select Priority 1 and from the Type of contact pull down list select outbound call – Mobile.

- Enter a telephone number for the manager S Tuck into the *Number* field

- Enter a description for the number, i.e. Mobile into the *Description* box and click OK to return to the *Contacts For* dialogue box.

- Click the **New** button again to add a **second telephone** number for the Manager S Tuck, this time selecting **Priority 2** and click OK.

Next, repeat the above steps to add the numbers for the engineers, their first contact being the mobile, the second t a local call to the office, as specified on the next page.

Close the *Rota Details* window when all numbers have been added.

Setting up Escalation Procedures

We now have to set up the Follow-up procedures as requested. If there is no response to the first specified action, the priority of the call must increase and further actions are to be added:

1. Phone the mobile number of the duty engineer
2. Wait for 10 minutes
3. Try the duty engineer on the office number
4. Raise the priority to 'Priority'
5. Repeat the above steps for engineer2
6. Raise the priority to 'Urgent'
7. Contact Mr Tuck, the Manager

The sequence of these contacts is defined by the client and can vary week by week, as the rotas of employee's change.

To assign the call out procedure, use the **Contact(1), Contact(2)** and **Contact(3)** options to enable the *Call Tracker* to determine the actor contact to use depending upon priority and time band**.**

Escalation Procedures: Engineer1

Select **New Action** at the Follow-up *Callflow Editor* Window.

- In the Choose the Type of New Action window select   Contact(1) from the list and click OK.
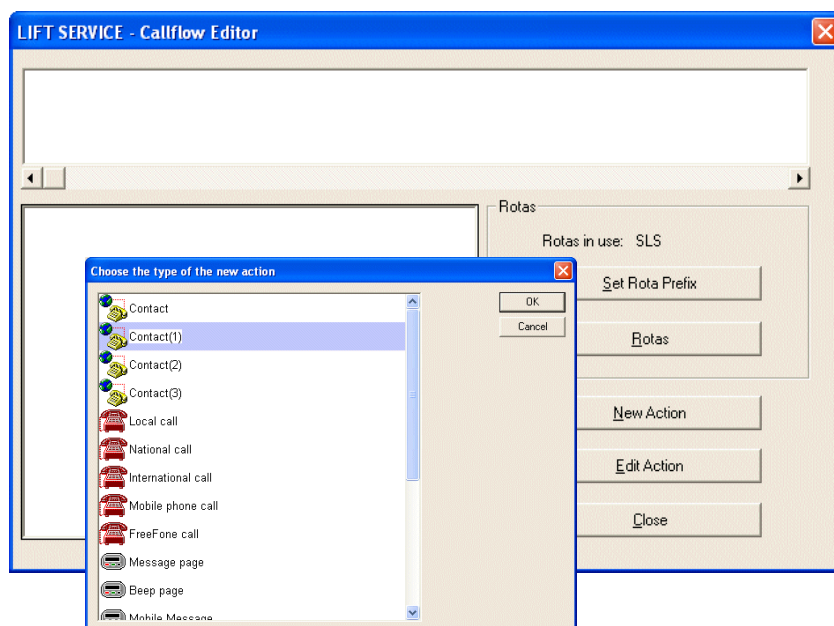
The Edit Action window opens.

- Select *Engineer1* from the drop down menu and click the *Insert* button to move <<Engineer1>> in the *Person to call* section

- Tick *Remind me again after* and select *10 minutes* from the drop down menu and click OK. Ignore the 'Change priority' check box for now.
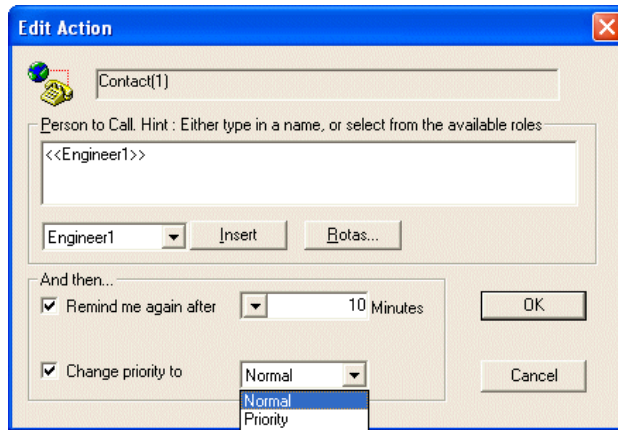
To raise the priority of a call out action, select from the options Priority, Urgent and Panic.

- In the Follow-up Callflow Editor window *Contact (1) Engineer1>>, hold for 10 minutes* appears.

- Select   Contact(1) <**Engineer1**>>' and drag and drop the action into the top section of the window.

The Call Tracker now knows that you wish to contact Engineer1 on his first contact number and the information has been added to the callflow.
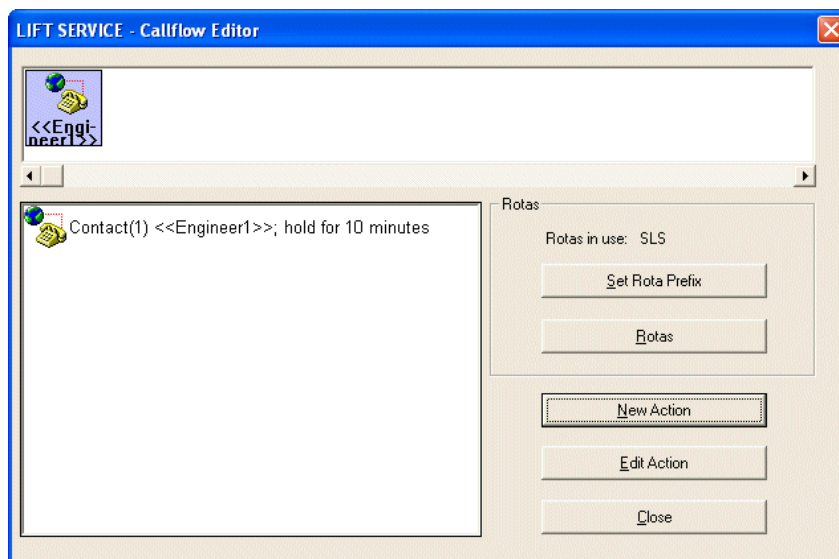
Next you want assign the second contact number for the first engineer.

To assign the first engineers second contact number

- Click **New Action** and select Contact(2)

- In the Edit Action dialogue box, select '**Engineer1**' again, *Insert* and OK.

- Tick *Change Priority* to and select *Priority* from the drop down menu.

- In the Follow-up callflow design window drag *Contact (2) <<Engineer1>>* into the top section of the window to put the information about contacting Engineer1 and his second number into the callflow.

Escalation Procedures: Engineer2 & Manager

Set up the contact procedures for Engineer2, selecting Contact(1) - Engineer2 and Contact(2) - Engineer2, and then for the Manager, changing the priority from 'Priority' to 'Urgent', as required.

Drag the contact actions into the top section of *the* window and add a loop action at the end of your follow-up callflow. This will automatically repeat all stages of the call out, starting again with 'Contact (1) – Engineer1…'
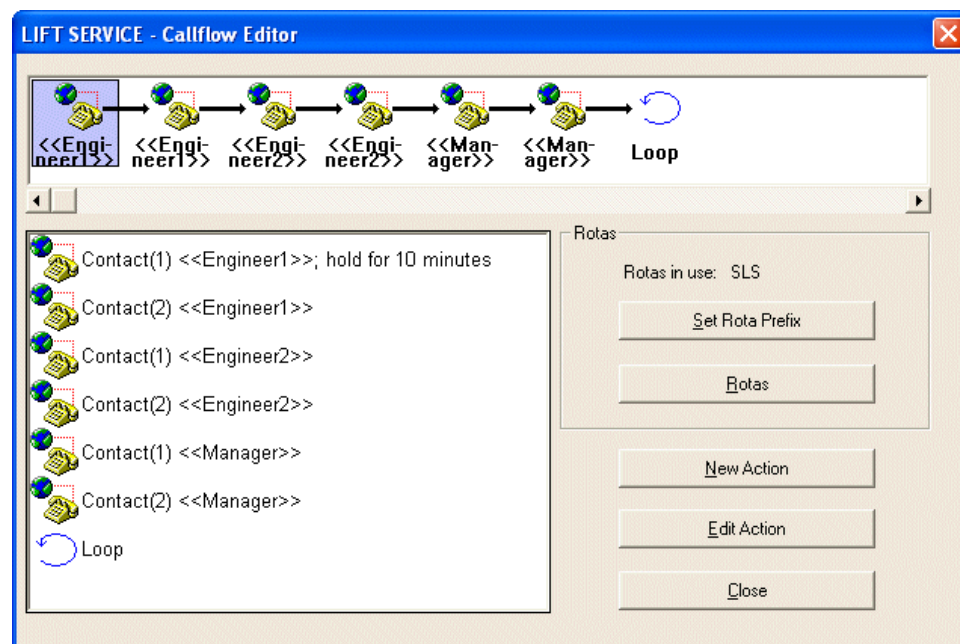

When all the desired actions have been set up, close the Callflow Design window and click OK in the *Conclusion* window.

The chequered flag *Finish* has turned from black to red to signify that this is a

Follow-up callflow. Save and publish the callflow before taking a call in the Agent view.

Help Pages in Escalation Procedures

Help Pages can be specifically designed and added as an action at strategic points within the follow-up procedures, allowing the Agent easy access to any relevant information whenever required.

- To design your Help Page(s) select **New Action** in the *Follow-up Callflow Design* window.

- In the *Choose the Type of New Action* window select ⑦ Help page   and click OK.
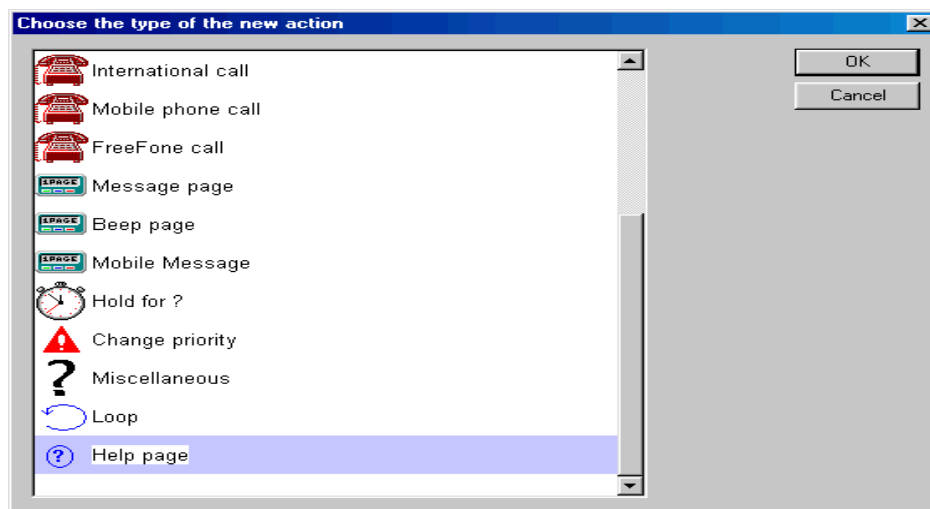
- Enter a name for the new Help Page in the window displayed or select an existing Help Page from the drop down menu, then click OK.
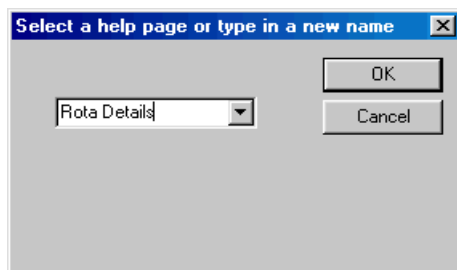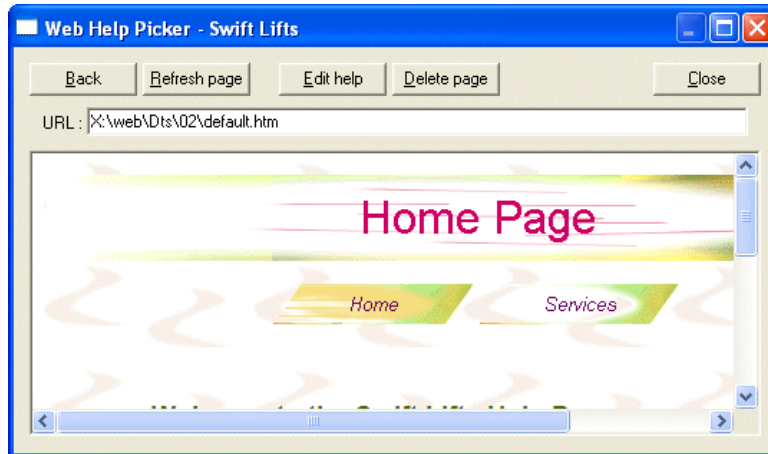

In the *PhDesign* window click **Yes** to confirm that you wish to set up a default page.
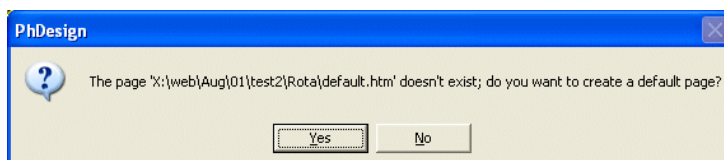
The Web Help Picker window will open.

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- Click *Edit Help* to open your HTML editor, create and save your Help Page.

- Exit your Help Page Editor and remember to click `Refresh page` to update your Help Page.

- Click CLOSE to return to your Follow-up Editor screen.

The Help Page icon together with the name of your Help Page, in our example 'Rota Details', will be displayed.

Select the image of the Help Page and drag and drop it into the top section of the window as part of the escalation procedure.
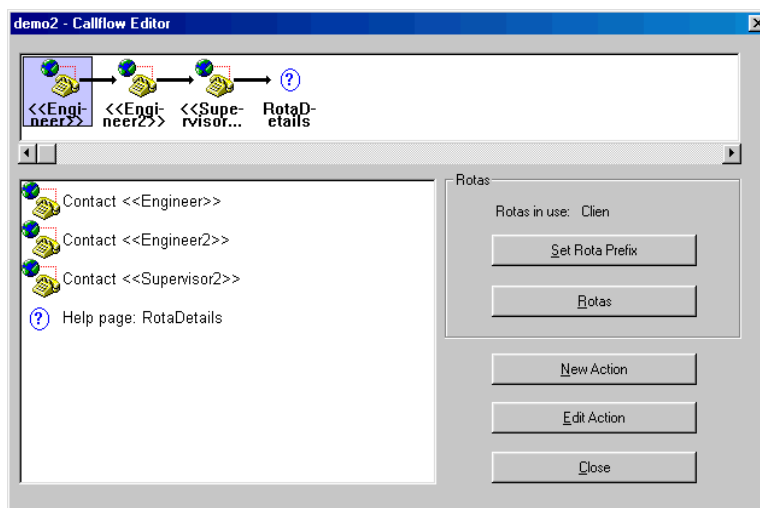
If you wish to edit your Help Page right click on the Help Page image and click *Edit*.

Save and publish your callflow before taking a call in the Agent view.

Pass to Team Action

The *Teams Augmented Call Tracker (TACT)* allows the filtering of active calls according to teams so that Agents will only handle calls from campaigns assigned to their team.

TACT is also the start to a workflow system as calls can be moved between teams using the 'Pass to Team' action. A Callflow containing all call details can thus be passed on to another department, i.e. Sales or Accounts, for processing.

To add the **Pass to Team** action:

- Select **New Action** at the Follow-up *Callflow Design* Window.

- In the **Type of Action** window, select the [Pass To Team] action and click OK.

The *Pass to Teams* window is now displayed, containing all the teams that have been created in the Synthesys Team Manager.
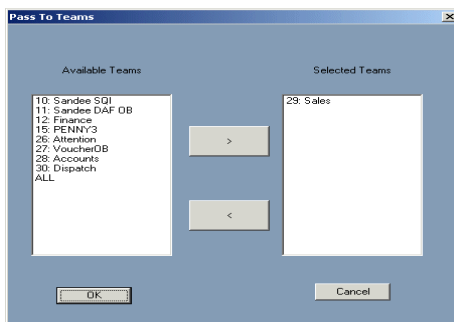
- Select the required team and click OK. In our example we have selected the 'Sales' Team: <<29>>.

- To add the action to your Follow-up callflow, drag the 'Pass to Team<<29>>'action into the top section of the Follow-up window.
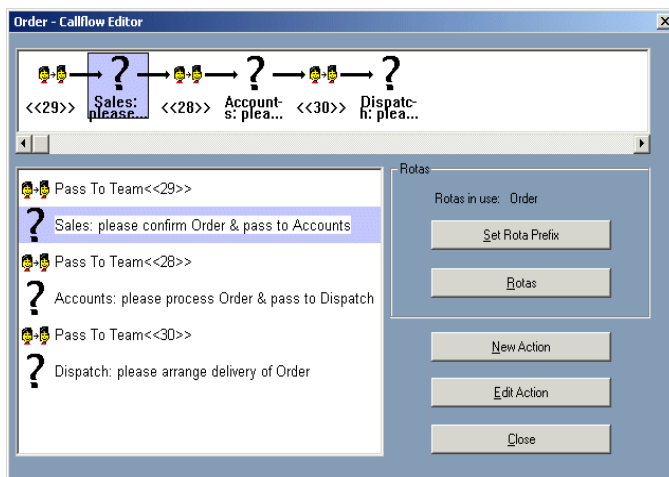
Use the [?] Miscellaneous action for brief instructions to the respective departments, i.e. Sales: 'Please confirm Order & pass to Accounts'

Adding, Editing and Deleting Theatres
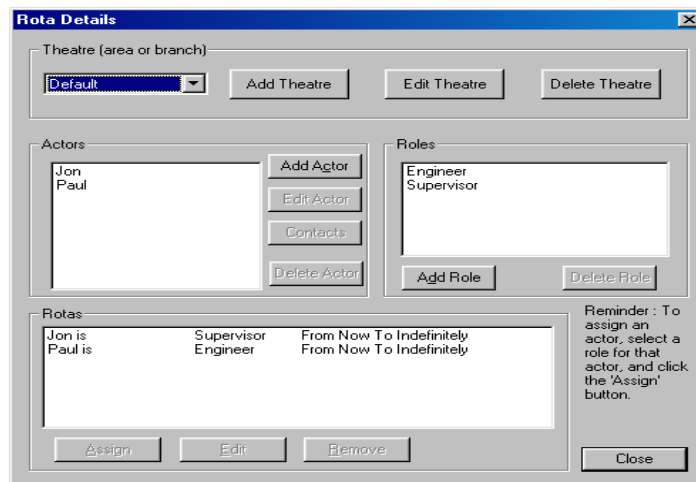
A Company may have a number of different area offices with different sets of engineers but using the same call out procedures for all areas.

If the roles and follow-up procedures are different, you need to use separate conclusion flags in the callflow, with associated follow-up procedures.

To create a link to the respective Theatres (area offices) use the DB table or Theatre Allocation control to the callflow.

In the **Rota Details** window you can add details of area offices clicking the *Add Theatre* button and edit or delete an existing Theatre using the *Edit Theatre* or *Delete Theatre* options.

- To add details of area offices, click the **Add Theatre** button.

- To edit a Theatre, select the Theatre from the drop down menu and click **Edit Theatre**

- To delete a Theatre, select the Theatre, remove the actors from the *Rota* window and then click **Delete Theatre**

Before you can delete a Theatre, you must remove the actors from the Rota window first.

To add details for a new area office:

- Click **Add Theatre**, to open the *Theatre details* window.

- Enter the required information, i.e. name of the area office and manager and other relevant details.

- Click OK to confirm the entry.
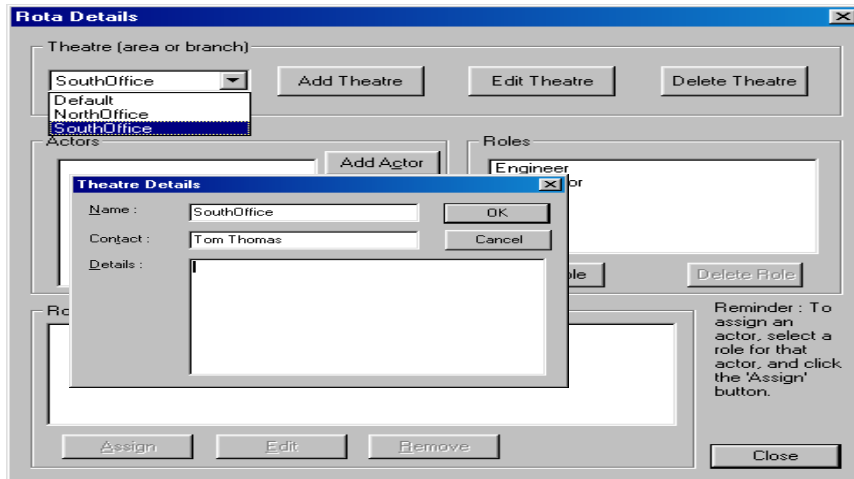
- Back in the Rota Details window select the required Theatre (office) from the drop down menu.

- Add the names and contact details of the actors for the selected area office and assign the actors a role and roster.

You can now use the existing escalation procedures, or set up new procedures.

Remember however that you can only use Theatres, if the call out procedures for the Default Theatre and all subsequent Theatres / area offices are the same

If the there are different call out procedures for each of area offices, you need to use separate conclusion flags in the callflow, each with the associated follow-up procedures.

ROTA IMPORT

The *Rota Import* facility allows the import of rota information using comma separated (.csv) or Excel (.xls) files. The Rota import programme will load the input file and put the associated data in the Rota tables for the specified Prefix.

To utilize the *Rota Import* facility, you must create the columns and field types as outlined in the section **Rota Import Specifications**.

If the rota prefix that you import already exists, information of the existing rota table will be updated, with the exception of the **Role, Start, End** table. Role assignment records will always be added, never updated and any existing role assignments for this actor will still be valid.

Please see next page for more information.

Points to consider

Please see the **Rota Import Specifications** section for detailed information regarding the columns and field types used for the rota import.

Please also consider the following points, when checking the data file that you are about to import:

Rota Import using Excel	To import rotas using xls files, Excel needs to be installed on the workstation from which you run the rota import.
Length of Rota Prefixes	Rota Prefixes must <u>not</u> be longer than 5 characters and the Prefix must start with a letter, rather than a number, or the rota import will fail.
Using the Default Theatre	If you wish to use the Default Theatre, either enter the word 'Default' in the Theatre column or leave the Theatre column blank. (If the Theatre column is blank/empty, the Default Theatre will be assigned automatically, unless you cancel the rota import).
Type of Contact	The available options for the type of contact need to be entered in the format specified (i.e. Outbound – Local) otherwise the record will not be imported.
Date Time Format	Dates and time must be entered as the date/time format: yyyy-mm-dd hh:mm:ss (2003-12-31 23:59:59).
Out of Time contacts	To display 'Out of Time' contacts for the various numbers entered for *Contact 1-3*, you must enter the start and end date / time (yyyy-mm-dd hh:mm:ss) into the respective 'Start' and 'End' columns. If the contact numbers are available from 'Now' to 'Indefinitely', the 'Start' and 'End' columns can remain blank.
Date/Time for Roles (Engineer/Manager etc)	The 'Start Date/time' and 'End Date/time' fields, specifying when an actor (Engineer/Manager etc) is on duty, should always contain a date/time format: yyyy-mm-dd hh:mm:ss. If the fields are left blank, the actors will be assigned as being on duty from 'Now' to 'Indefinitely'.

Importing Rotas

The facility to import rota information from csv or xls files is accessed via *Campaigns* under the **Setup** heading of the Synthesys Main Screen:

- Open the callflow to be used for the rota import and in the *Campaign editor* go to **Maintenance** on the **Tools toolbar**.

- Select **Import Rotas** from the drop down menu**.**

- Locate the **file** that contains the rota information that you wish to import. The file can be a comma separated (.**csv**) or Excel **(.xls)** file.

The *Rota Import* window will open, indicating the start of the rota import.
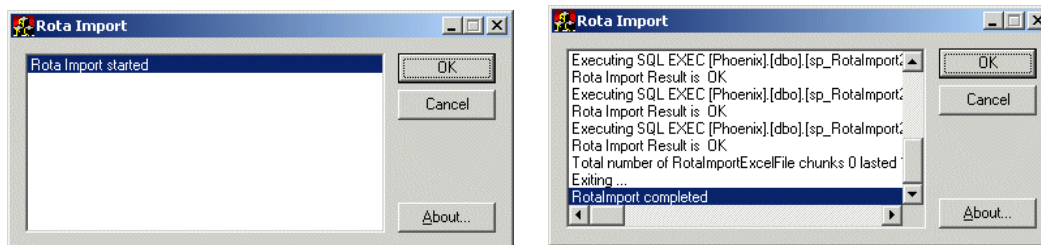
- Click OK when the message **Rota Import completed** is displayed.

Blank Theatre Names

If the Theatre name column is blank/ empty, a message will be displayed informing you that the Default Theatre will be assigned automatically.

Click **OK** to use the *Default Theatre*, or **Cancel** to abort the Rota Import.
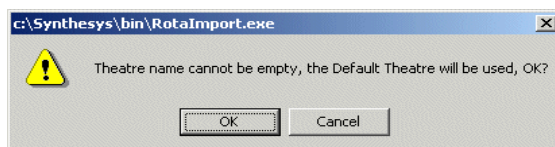
When setting up escalation procedures select the rota prefix that you have imported, containing the rota information about actors (Engineer/Manager etc), their roles, contact numbers and Theatres (area offices).

All you need to do is to set up the order of the escalation procedures using *New Action*.

If Theatres are used, you must use the DBtable *or* Theatre Allocation *control to create a link to the respective Theatres (area offices).*

Rota Import Specifications

Field	Description	Mandatory	Type
ID	A unique ID for each actor (Engineer/Manager etc)	**Mandatory**	Numeric, a unique identifier
Prefix	The Rota Prefix in use	**Mandatory**	String VARCHAR (10)
ActorName	Name of actor (Engineer/Manager etc)	**Mandatory**	String VARCHAR (100)
Contact	Leave blank if actors have more than one contact number or if you wish to use the Auto Dial option. Use Contact 1-3 instead.	Optional	String VARCHAR (100)
Details	No information required if actors have more than one contact number or if you wish to use the Auto Dial option. Use Contact 1-3 instead.	Optional	String VARCHAR (255)
Theatre	Name of Theatre, if Theatres are used. T*o use the Default Theatre* enter the word *Default* or leave blank.	**Mandatory**	String VARCHAR (100)
CONTACT GROUP1			
Contact1	Contact Details: The **first contact number** for an actor. Actors can have up to 3 contact numbers: Contact 1 – 3	Optional	String VARCHAR (80)
Priority1	The Priority for the numbers entered in Contact 1 - 3 Enter **1** to use the Contact1 number as the **first number of contact.**	Optional	Integer INT
Type1	First type of contact, i.e.: Outbound call – Mobile **Available Options:** 'Outbound call - Local', 'Outbound call - National', 'Outbound call - International', 'Outbound call - Mobile', 'Page - Message', 'Page - Bleep', 'Outbound call – Mobile Message', 'Outbound call - Freephone'	Optional	String, VARCHAR (80)
Start1	Contact Starts: the Date/Time from which the number entered in Contact1 is available	Optional	String (date time format '2003-12-31 23:59:59') VARCHAR (20)
End1	Contact Ends: the Date/Time until which the number entered in Contact1 is available	Optional	String (date time format '2003-12-31 23:59:59') VARCHAR (20)

Field	Description	Mandatory	Type
CONTACT GROUP2			
Contact2	The **second contact number** for an actor.	Optional	String VARCHAR (80)
Priority2	Enter **2** to use the Contact2 number as the **second number of contact.**	Optional	Integer INT
Type2	Second type of contact. See Type1 for available options	Optional	String VARCHAR (80)
Start2	Contact Starts: the Date/Time from which the number entered in Contact2 is available	Optional	String (date time format '2003-12-31 23:59:59') VARCHAR (20)
End2	Contact Ends: the Date/Time until which the number entered in Contact2 is available	Optional	String (date time format '2003-12-31 23:59:59') VARCHAR (20)
CONTACT GROUP3			
Contact3	The **third contact number** for an actor.	Optional	String VARCHAR (80)
Priority3	Enter **3** to use the Contact3 number as the **third number of contact.**	Optional	Integer INT
Type3	Third type of contact. See Type1 for available options	Optional	String VARCHAR (80)
Start3	Contact Starts: the Date/Time from which the number entered in Contact3 is available	Optional	String (date time format '2003-12-31 23:59:59') VARCHAR (20)
End3	Contact Ends: the Date/Time until which the number entered in Contact3 is available	Optional	String (date time format '2003-12-31 23:59:59') VARCHAR (20)
Role	The Role of an actor, I.e. Engineer or Manager etc.	**Mandatory**	String VARCHAR (255)
Start Date/time	The date and time from which the actor is on duty	**Mandatory**	String (date time format '2003-12-31 23:59:59') VARCHAR (20)
End date/time	The date and time until which the actor is on duty	**Mandatory**	String (date time format '2003-12-31 23:59:59') VARCHAR (20)

Group contact details are only 'optional', if the contact group is NOT to be used. If the contact group is used, all fields need to be populated.