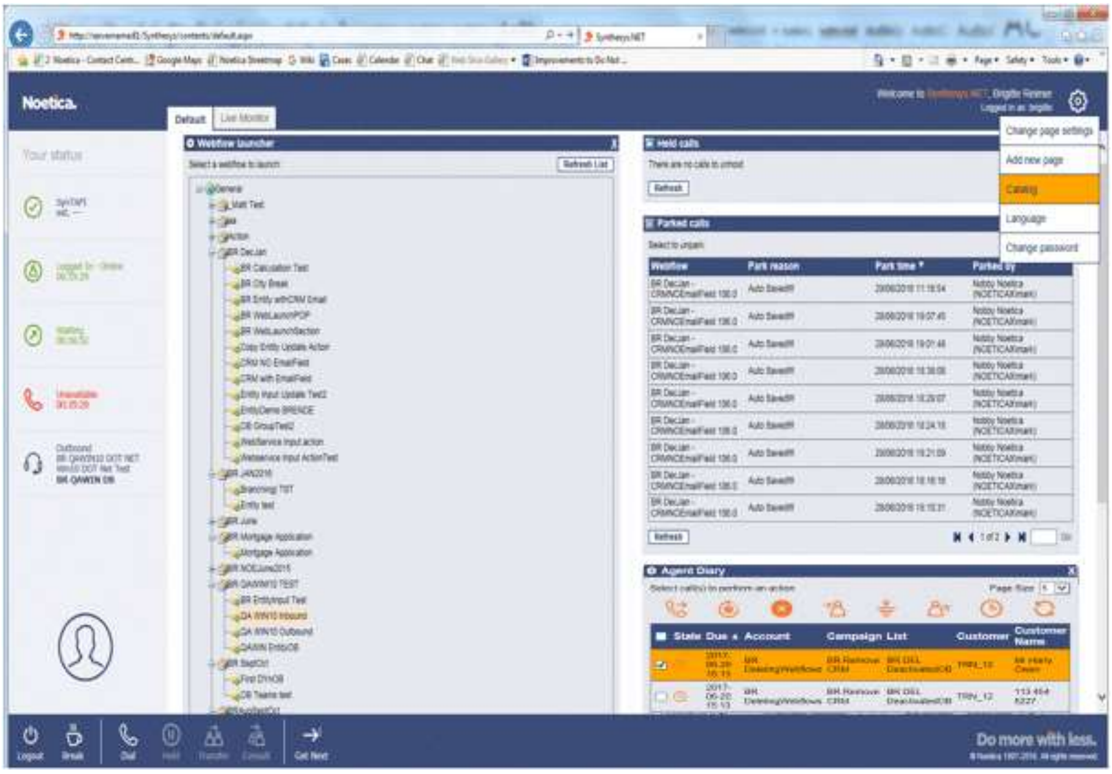
# SYNTHESYS™

# WEB PARTS



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You must exercise care to ensure that your use of the software is in full compliance with laws, rules, and regulations of the jurisdictions with respect to which it is used.

The information contained in this document may change. We may issue revisions from time to time to advice of changes or additions. We operate a policy of constantly improving and enhancing our application software. There is a possibility, therefore, that the format of screen displays, and printed output shown in this documentation may differ slightly from that provided in the software. It is our policy to update this documentation whenever a major release of software takes place.

Synthesys™ Portal Web Parts

Last updated January 2022

CONTENT

## ADDING SYNTHESYS™ WEB PARTS

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 you log on to the Synthesys™ Portal for the first time, please 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 Webflow Launcher

Users with access permission to the Webflow launcher can open and run Scripted apps. To add the Webflow launcher web part to the Synthesys™ Portal

- Go to the **Settings** icon at the top right of the Synthesys™ Portal screen.
- Select **Catalog** *and* place a tick into the check box next to Webflow launcher.
- Click the **Add** button, to add the Webflow launcher to your Web page.

The *Webflow launcher* screen graphically represents the customer accounts and Scripted apps that are stored within the system.

A Scripted app is created for each campaign you are managing and is stored under the appropriate customer account.


*Users are only able to see the Scripted app accounts and campaigns that have been added as part of their current user permissions.*

# Held and Parked Calls

The Held and Parked calls options enable users to view a list of held and parked Scripted apps. To add the Held and Park web parts to the Synthesys™ Portal

- Go to the **Settings** icon at the top right of the Synthesys™ Portal screen.
- Select **Catalog** *and* place a tick into the check box next to *Held calls* and *Parked calls*.
- Click the **Add** button, to add the web part to your Web page.
- Click the ***Refresh*** button, to update the list of parked or held Scripted apps.

*The number of calls displayed on a page can be adjusted using the Page size drop down menu. To move to a specific page, enter the page number into the box at the bottom right of the Parked/ Held calls window and then click the Go button.*

To re-run parked and held calls, click the left mouse button on the relevant Scripted app. All call data previously collected will have been retained and agents can now take any further details as required, to complete the call.


| Option | Displays the |
|---|---|
| Webflow | Name and Version number of the Scripted app that is parked or on hold. |
| Park reason | Reason the Scripted app was parked or held. The *Parked & Held* information can be configured in the Webflow properties section to include other relevant details as required, for example customer name and contact details. |
| Park time | Date and time the Scripted app was parked or held. |
| Parked by | Name of the person who parked the Scripted app or put it on hold. |

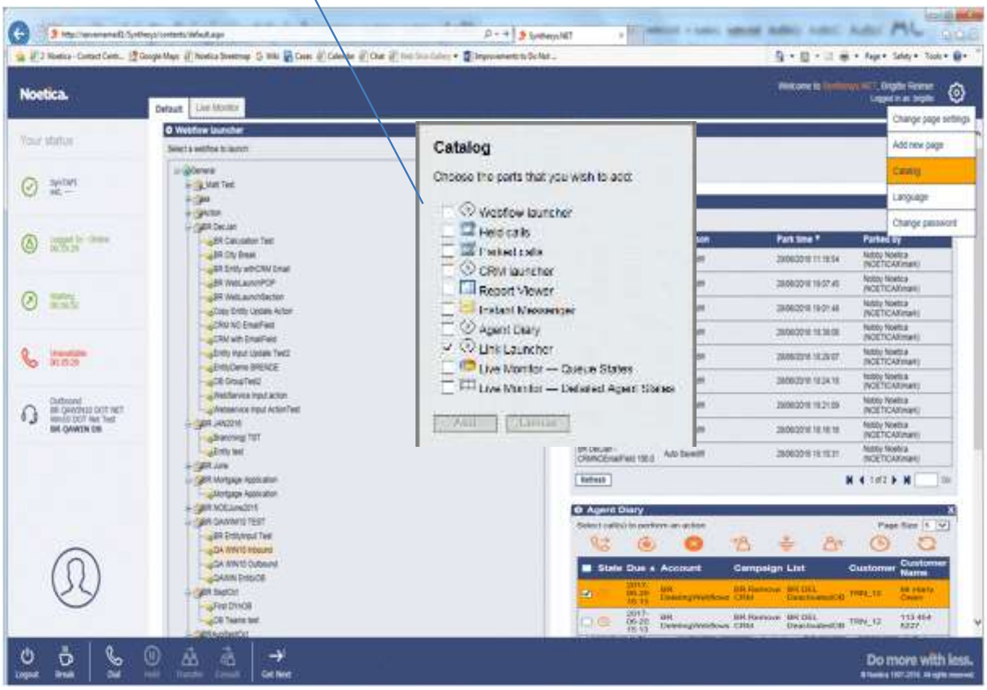
## The Link Launcher

The Link Launcher Web Part in the Synthesys™ Portal allows the user to open pre-defined links in a new window.

The links can be represented as text, an image, or both. The launcher can pass parameters to the opened window, either user provided or via a selection of Synthesys™ variables. The links are defined in an XML configuration file.

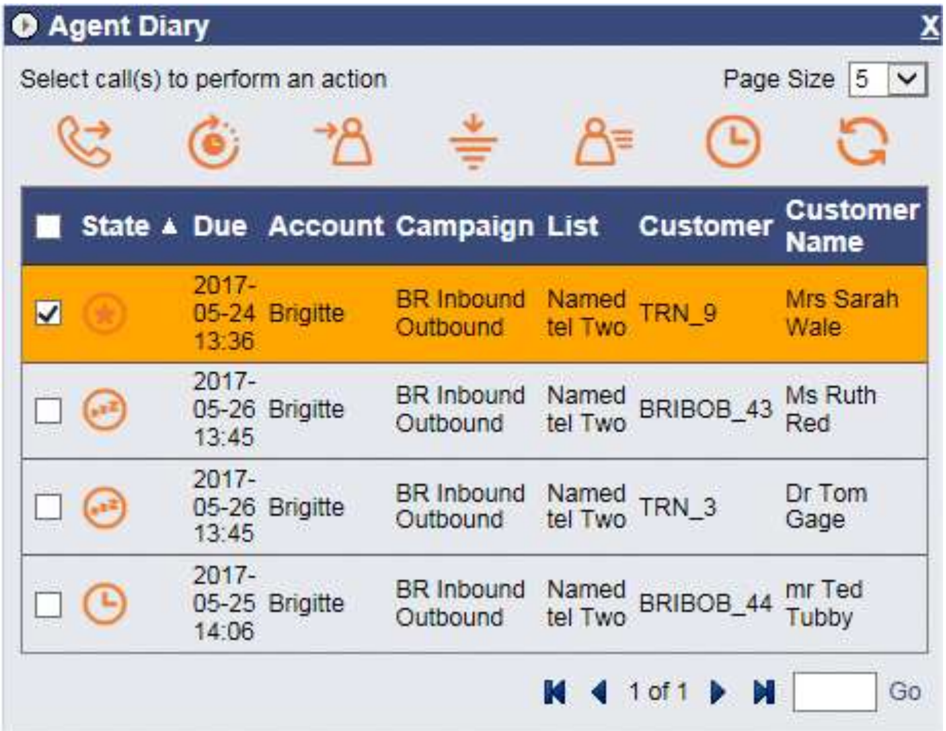
**To add the Link Launcher web part to the Synthesys™ Portal**

- Go to the **Settings** icon at the top right of the Portal screen and select **Catalog**.
- In the *Catalog* page, tick the options **Link Launcher,** to display the Link Launcher Web Part in the Synthesys™ Portal.




- Users can now click on any of the links, as pre-defined in the Link Launcher Web Part, to launch the associated web page.

# Agent Call Diary



# The Agent Diary

The **Agent Diary** enables call centre agents to view view priority, scheduled and sleeping calls assigned to them, with the option to manipulate these calls.

The Agent Diary displays a list of all calls that are assigned to the agent currently logged into the workstation and enables the agent to view associated details, including:

- State of the call
- Date the call is due
- Name of Account, Campaign and Outbound list
- Customer prefix and Customer Name
- Customer details and history events associated with the selected call

In addition agents are able to:

- Reschedule calls to a later date and time
- Reassign calls to another agent

*At client's request, we can also enable a* ***Remove*** *option in the Agent Diary. Be aware however that this will allow agents to delete any calls that they select in the Agent Diary from the associated outbound call lists.*

*Should you wish to use this option, please contact a Noetica representative and we will add the Remove icon to the Agent Diary toolbar.*

## Starting the Agent Diary

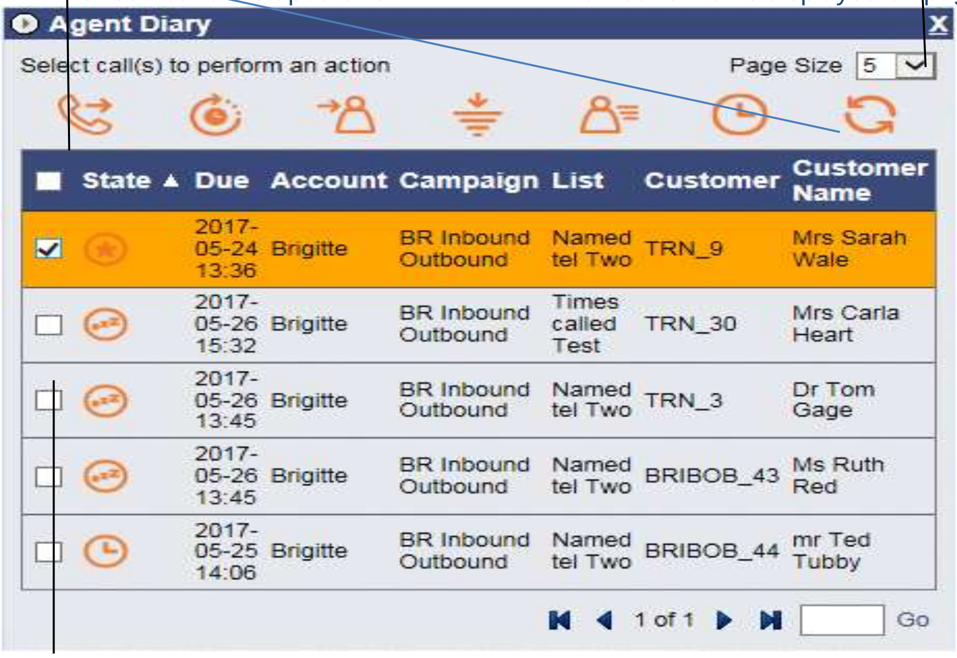
If the Agent Diary is not already displayed in the Synthesys™ Portal you can add the option, providing that you have the relevant access permission.

- Go to the **Settings** icon at the top right of the Synthesys™ Portal screen.
- Select **Catalog**, and then tick the check box next to **Agent Diary** option.
- Click the **Add** button, to add the Agent Diary to your Portal page.

Toolbar with icons and tool tips to allow manipulation of calls

Refresh button to update list

Number of items displayed on page




List of priority, sleeping & scheduled calls assigned to agent logged on

| Option | Description |
|---|---|
| **State** | Icons and tooltips of priority, sleeping and scheduled calls assigned to the agent currently logged into the Synthesys™ Portal. |
| **Due** | Date the call is due to be presented to the agent. |
| **Account** | Name of the account associated with the call displayed |
| **Campaign** | Name of the campaign associated with the call displayed. |
| **List** | Name of the outbound list associated with the call displayed. |
| **Customer** | CRM prefix for the call displayed. |
| **Customer Name** | Name of customer for the call displayed |

Please see the next pages for a description of the Agent Diary toolbar and options available.

## Call States

The **State** column shows icons and tooltips of priority, sleeping and scheduled calls that have been assigned to the agent currently logged into the Synthesys™ Portal.

| Icon | Description |
|---|---|
|  | **Priority.** Priority calls (also referred to as *Emergency* calls), take the highest priority and will be presented to the agent first, before due scheduled or sleeping calls. |
|  | **Scheduled.** Shows calls that have been scheduled to be taken at a particular date and time. |
|  | **Sleeping.** Refers to calls waiting to be presented to the agents at a predefined time. |

## Agent Diary Toolbar

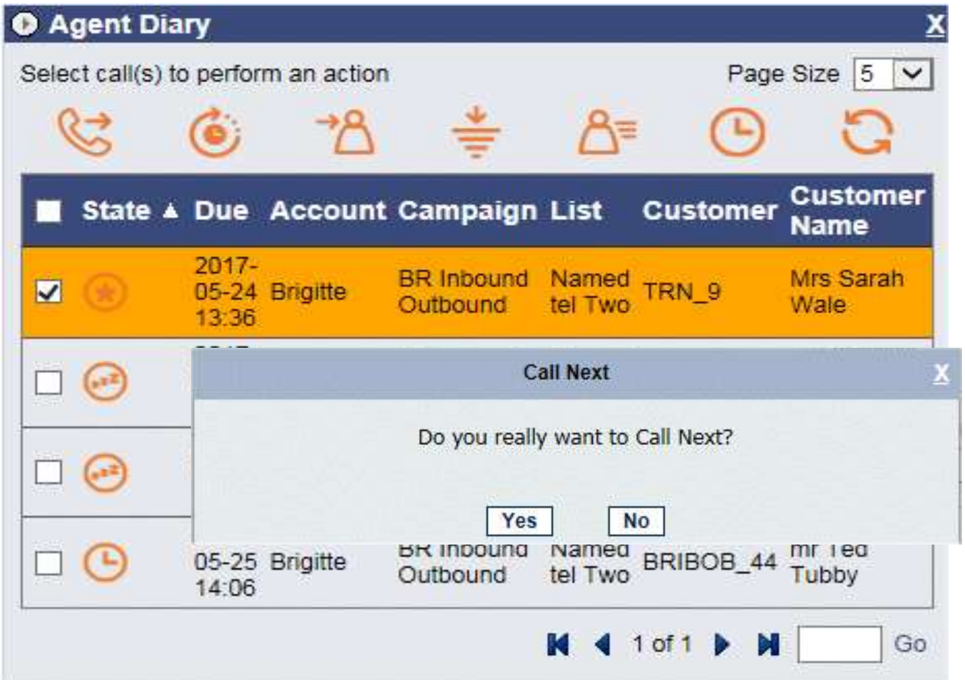
The Agent Diary has one main toolbar:

| Icon | Description |
|---|---|
|  | **Call Next.** Pick up the selected call to take it immediately (as soon as possible). |
|  | **Reschedule.** Schedule the selected call to be taken at a later date/ time. |
|  | **Reassign.** Assign the call to another agent. |
|  | **Filter**. Set a filter to display selected calls only. |
|  | **Details**. Display customer details associated with the selected call. |
|  | **History**. Display the history events associated with the selected call. |
|  | **Refresh.** Update the list of priority, scheduled and sleeping calls. |

## Call Next

To pick up and handle a priority, scheduled or sleeping call immediately:

- Select the first record that you wish to call, ensuring that you only select one record at a time, otherwise the Call Next button will be disabled.
- Click the ***Call Next***  icon.




- Click **Yes** to open the selected call on your screen, ready for you to handle.
- Click **No** to cancel the action.

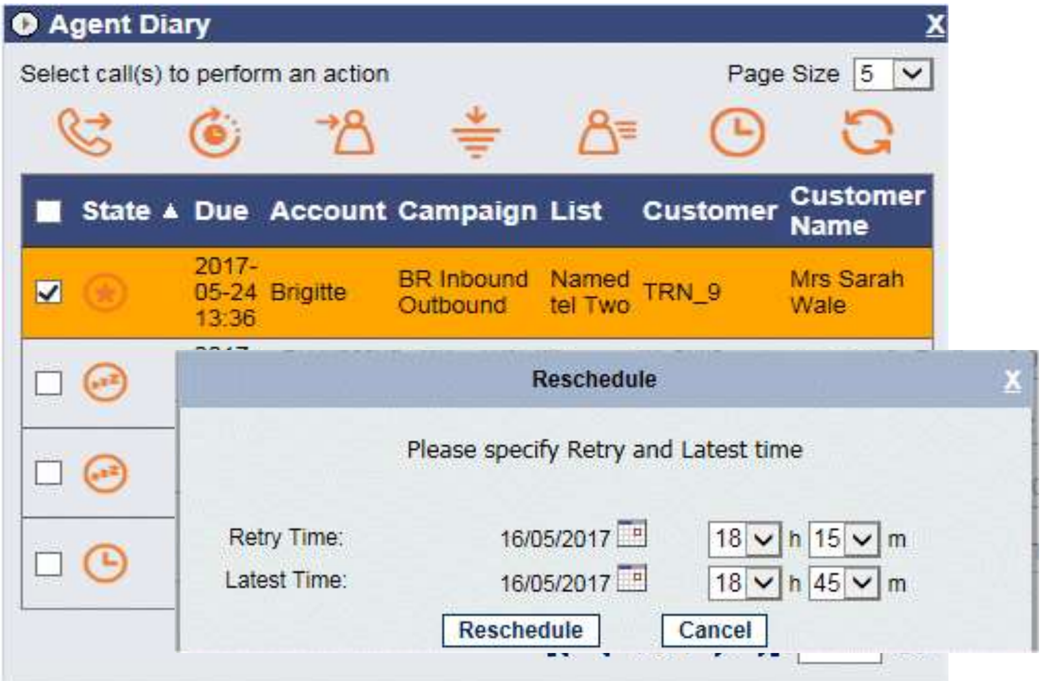
*On clicking Call Next, the button will be disabled until the record is given to the agent.*

*In the Agent Diary, users are able to select and call records that are assiged to them from outbound lists that may currently not be in their team. To allow for these records to pop to the agent screen however, supervisors <u>must</u> ensure that the scripted apps associated with the outbound lists are part of the users' team.*

## Reschedule

To reschedule selected calls to be taken at a later date and time:

- Select the record(s) that you wish to reschedule.
- Click the ***Reschedule***  icon.




In the Reschedule dialog subsequently displayed:

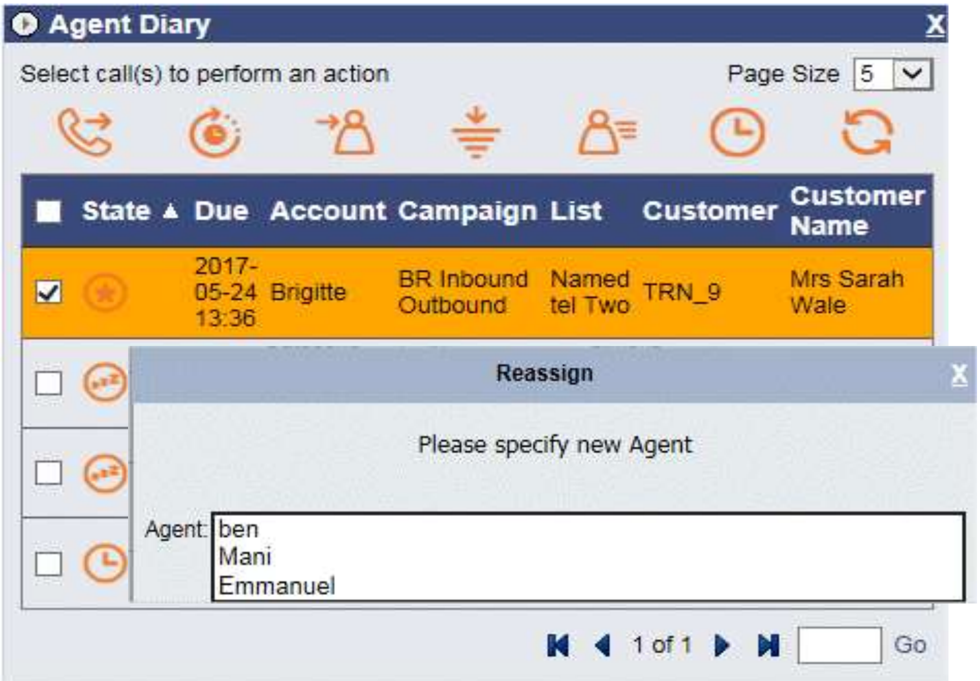
- Select the date and time to reschedule the call.
- Select the latest date and time during which the call should be taken.
- Click **Apply** to display the changes.
- Click **Cancel,** to abandon the action.

The outbound call list will be updated automatically, displaying the new date and time for the callback.

## Reassign

To reassign priority, scheduled and sleeping calls to another agent:

- Select the record(s) that you wish to reassign.
- Click the ***Reassign*** icon.




By default, the *Agent* drop down list in the **Reassign** dialog only shows the names of agents that are able to work the outbound list, to which the selected record belongs.

- Select the ***Name*** of the agent to whom you wish to assign the call.
- Click ***Apply*** to confirm, 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.

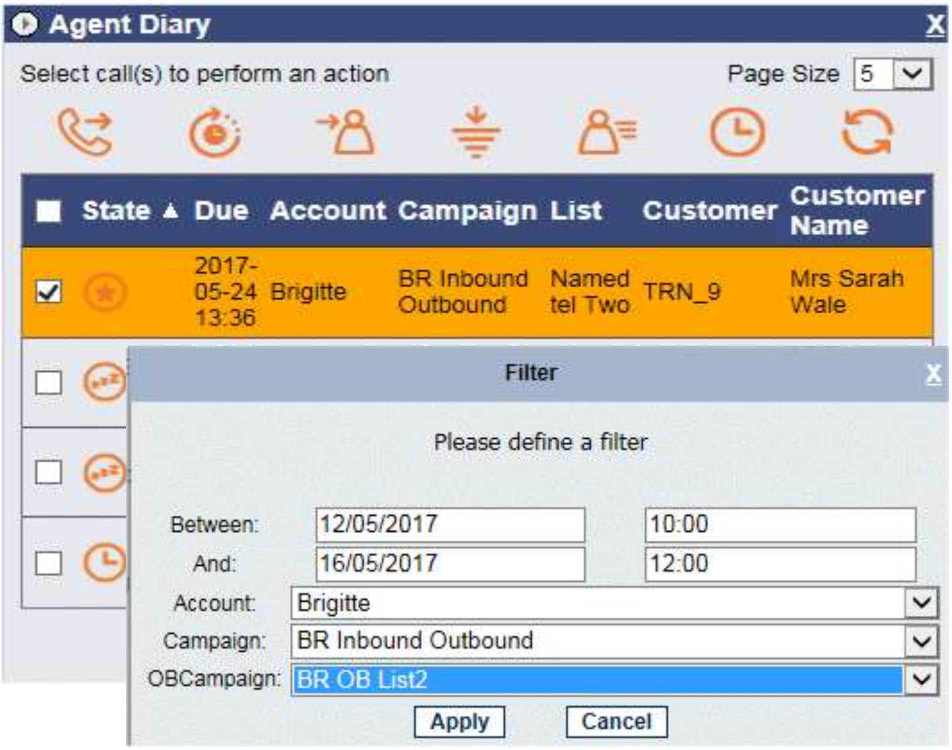
*By default, a call can only be reassigned to agents that are members of a team that also contains the outbound list associated with the selected record.*

*To allow the re-assignment of calls to any agent, regardless of team membership, please contact a Noetica representative with the request to enable this functionality.*

## Filter

If you wish to view selected calls only, use the ***Filter*** option to specify the date and time, account, campaign and outbound list tor the records to be displayed.

- Click the ***Filter***  icon, to open the Filter dialog.
- Enter the **date** and ***time*** for your filter into the *Between:* and *And: fields*.
- Select the name of the ***Account, Campaign*** and ***OBCampaign*** (List) from the respective drop down menus, to display the associated assigned calls.

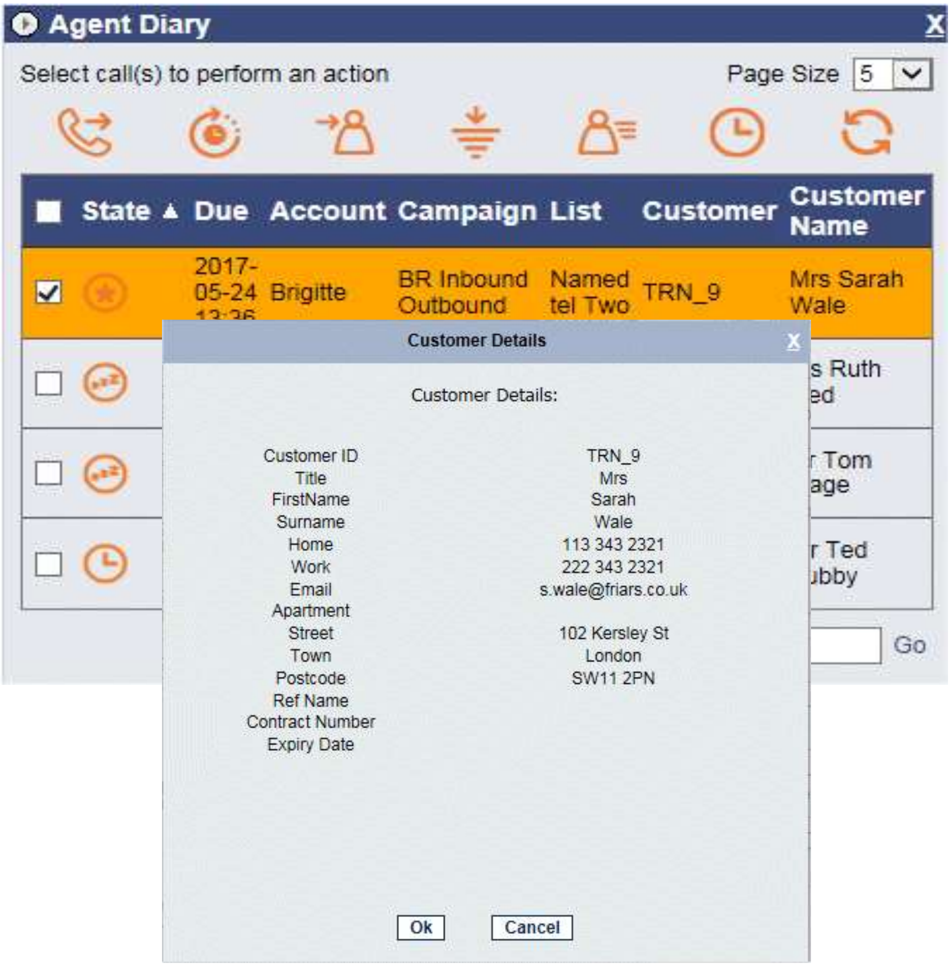



- Click *Apply* to display the filtered calls only.
- Click *Cancel* to close the Filter dialog without saving the changes.

## Details

To view customer details for a selected call

- Select the record that you wish to view, then click the  ***Details*** icon.

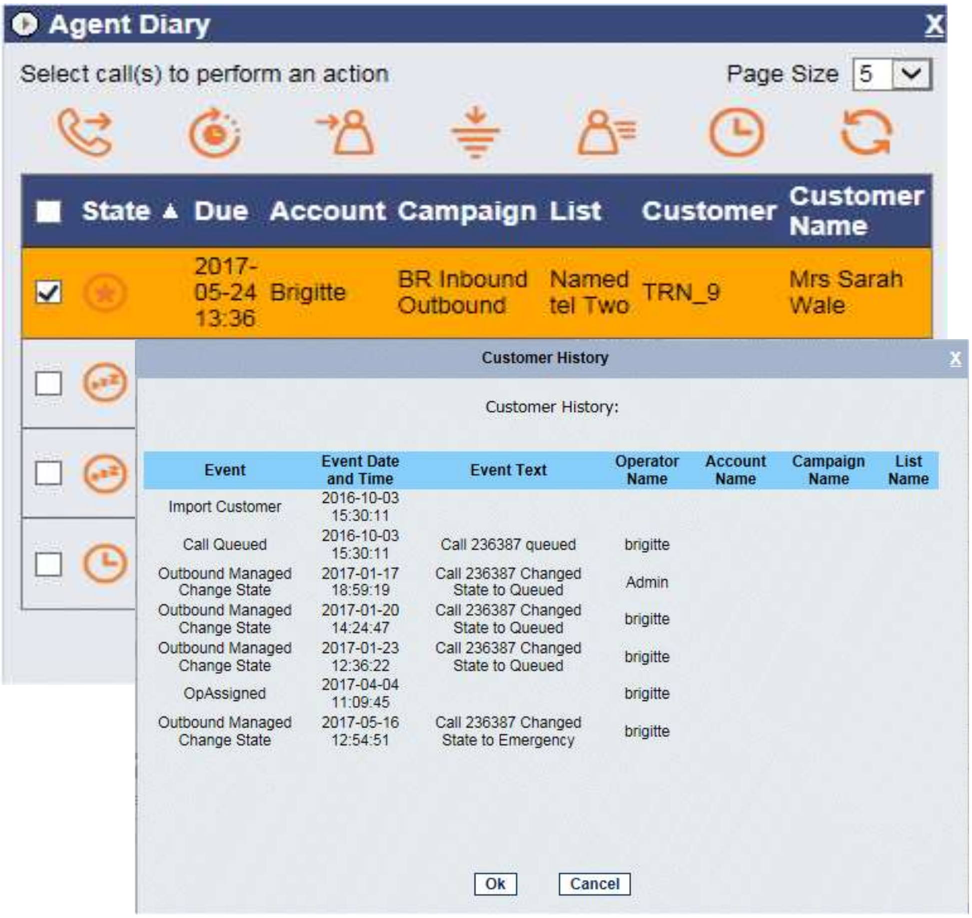



In the ***View Details*** dialog now displayed you can view the customer details associated with the selected call.

## History

To view history events for a selected call

- Select the relevant record, then click the  ***History*** icon.

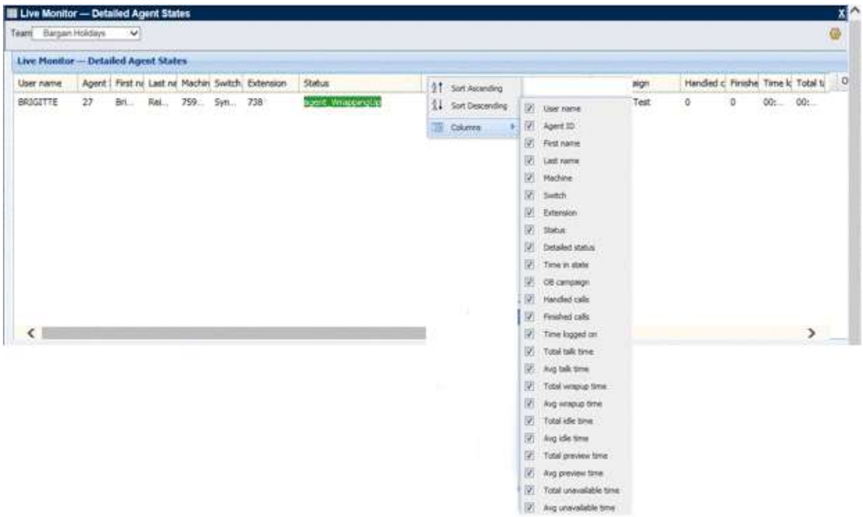



In the ***History for the customer*** dialog now displayed you can view history events associated with the selected call.

# LIVE MONITOR WEB PARTS

## Queue Distribution


## Agent State



## The Live Monitor

The *Synthesys™ Live Monitor* web parts in the Synthesys™ Portal allow Supervisors with access permission to view *real-time* information of the Agent State and the Queue distribution for a selected team.

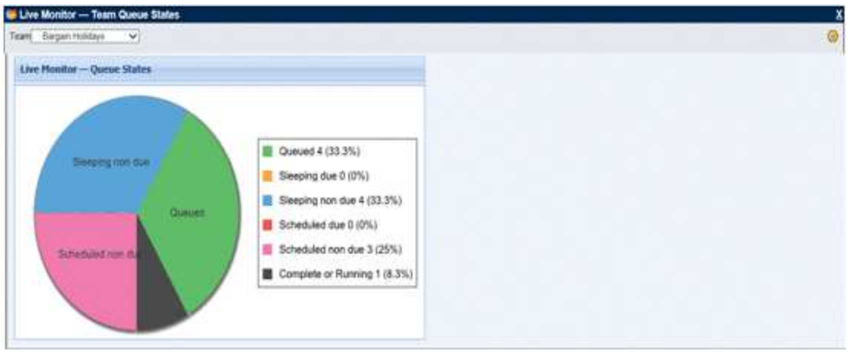
Team based security ensures that users can only select and view teams of which they are a member, or teams for which they are the team manager and sub teams to the team of which the user is the team manager.

**To add the Live Monitor web part** to the Synthesys™ Portal

- Click on the **Settings** icon at the top right of the Synthesys™ Portal screen and select **Catalog**.
- In the **Catalog** page tick the options Live Monitor – Queue States and Live Monitor – Detailed Agent States, as required.
- The selected options will be displayed as a Web Part in the portal.
- From the respective Team drop down menus select the relevant team to view Detailed Agent ***States*** and ***Team Queue States***.

### Queue Distribution

The **Live Monitor – Queue States dialog** shows, visually in a graph, the number and percentage of Queued, Sleeping due, Sleeping non due, Scheduled due, Scheduled non due, Complete or Running calls.

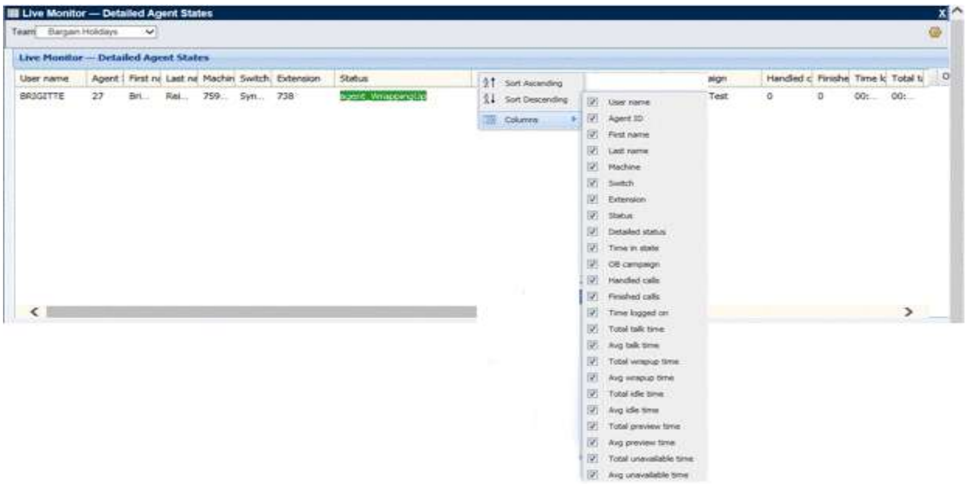



Please see next page for options available for the **Live Monitor – Detailed Agent States.**

## Detailed Agent States

The **Live Monitor – Detailed Agent States dialog** shows details of the agents logged on to the Synthesys™ Portal, the switch used, extension number and call statistics.

- To choose which columns to displayed **and in which order, click *on*** one of the column headings, to display the options ***Ascending, Descending*** and ***Columns***.
- When selecting **Columns,** you can tick the columns for which you want to display information, and un-tick the columns that you wish to hide from view.
- Selecting ***Ascending*** or ***Descending,*** you can sort the information displayed in Ascending or Descending order.



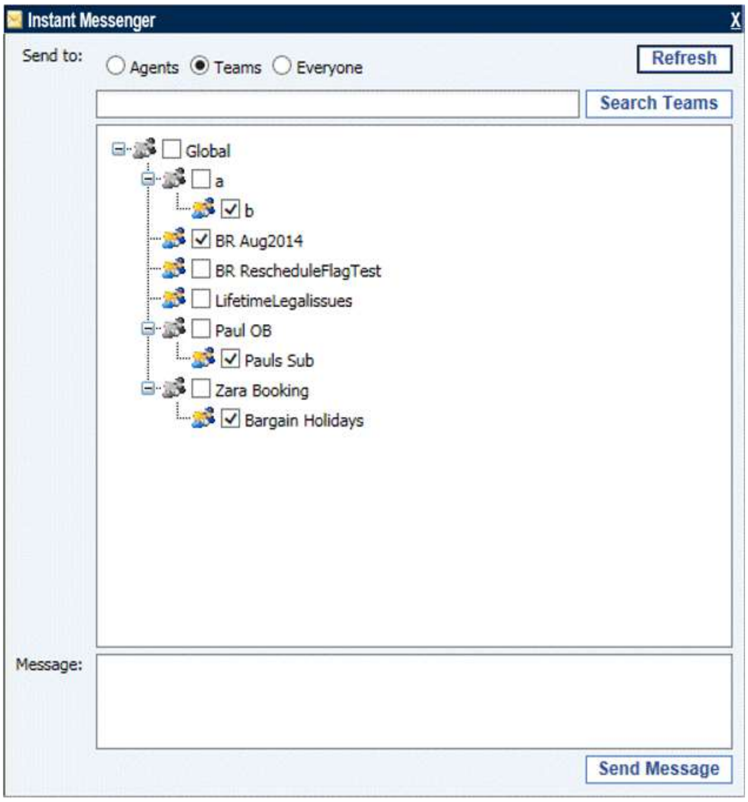

The detailed agent state option is available for the selected team and shows real time statistics for all agents logged into the Synthesys™ Portal.

| Option | Displays: |
|---|---|
| User Name | The name used to log on to Synthesys™. |
| Agent ID | The agent's ID, as allocated in Synthesys™I. |
| First Name | The agent's first name, as entered in Synthesys™. |
| Last Name | The agent's surname, as entered in Synthesys. |
| Machine | The name of the workstation. |
| Switch | The name of the switch / PBX used. |
| Extension | The extension number for the workstation. |
| Status | The current status of the agent, i.e. 'Waiting' 'Previewing' etc. |
| Detailed Status | The current agent state ('Available'; 'Unavailable – Break') or the agent's progress within a campaign, showing the campaign and current section name, or 'Wrap-up' when the agent has reached the conclusion window. |

Detailed Agent States continued

| Option | Displays: |
|---|---|
| Time in State | How long agents have been in the current Status. |
| OB Campaign | The name of the Outbound list currently allocated to the agent. |
| Handled Calls | All calls that the agent has taken. Aborted I/B calls are displayed as completed calls, aborted O/B calls show the selected aborted type. |
| Finished Calls | All Inbound and Outbound calls that an agent has completed, but NOT the aborted O/B calls. |
| Time Logged On | The time an agent has logged on and accessed ‘Start Work’. |
| Total Talk Time | The length of time an agent is both, connected on the phone and in a Synthesys™ Scripted app. |
| Avg Talk Time | The average length of time the agent is connected on the phone and in a Synthesys™ Scripted app (ONLY THE FIRST DIAL IS COUNTED HERE, ANY SUBSEQUENT DIALS ARE COUNTED IN WRAP). |
| Total Wrap-up Time | The total time when an agent is <u>not</u> both on the phone and in a script following a dial, whether the dial results in a connected call or not, plus any switch wrap up time. |
| Avg Wrap-up Time | The average time when an agent is <u>not</u> both on the phone and in a script following a dial, whether the dial results in a connected call or not, plus any switch wrap up time. |
| Total Idle Time | The total time between an agent ending wrap up status and getting the next screen pop. |
| Avg Idle Time | The average ‘Idle Time’ between an agent ending wrap up status and getting the next screen pop in any one session. |
| Total Preview Time | The total time an agent is in a Synthesys™ Scripted app BEFORE the call is connected. |
| Avg Preview Time | In average length of time an agent is in a Synthesys™ Scripted app BEFORE the call is connected. |
| Total Unavailable Time | The total time of an agent being unavailable to take calls in any one session. |
| Avg Unavailable Time | The average time of an agent being unavailable to take calls in any one session. |

# INSTANT MESSENGER



# The Instant Messenger

The **Instant Messenger** is a portal web part that allows users with the relevant permissions to send messages to other users currently logged into the Synthesys™ Portal.

The message can contain a maximum of 200 characters. The text box can't be left empty, else an appropriate error message is displayed. Any html tags are stripped from the text.

Messages sent will pop up at the bottom right hand corner of the Portal or scripted app screen and will be deleted automatically once the message has been read and is closed.

Details of messages will be stored in the Phoenix Audit table, including information about who has sent a message and to whom it was sent, the date it was sent and from which machine, and the content of the message.

To access details of the Phoenix_Audit table, you need to either query the table directly, or write a report to analyse audits for instant messages.

*Users who don't have permissions to send messages are still able to add the Instant Messenger web part to their portal via the Catalog and to receive messages, but the message text box and send message button will be disabled.*

*The message text box will contain a message explaining that they do not have the correct permissions to send messages.*

*By default, only users assigned the role of Administrator in Synthesys™ can send messages. If you require any other user roles, apart from Administrator to be able to send messages, please contact the Noetica technical support desk.*

*If permissions are changed, users will have to remove and re add the Instant Messenger web part to get the updated setting.*

## Adding the Instant Messenger

The **Instant Messenger** is a portal web part that allows users with the relevant permissions to send messages to other users currently logged into the Synthesys™ Portal.

To add the Instant Messenger web part to the Synthesys™ Portal

- Go to the **Settings** icon at the top right of the Synthesys™ Portal screen and select *Catalog.*
- In the Catalog page, tick the **Instant Messenger** check box.
- Click the **Add** button, to add the Instant Messenger to the Portal.


*By default, only users assigned the role of Administrator in Synthesys™ can send messages. If you require any other user roles to be able to send messages, please contact the Noetica technical support desk.*

*If permissions are changed, users will have to remove and re add the Instant Messenger web part to get the updated setting.*

*Users without permissions to send messages are still able to add the Instant Messenger web part to their Portal to receive messages, but the message text box and send message button will be disabled. The message text box will contain a message explaining that they do not have the correct permissions to send messages.*

## Sending Permissions

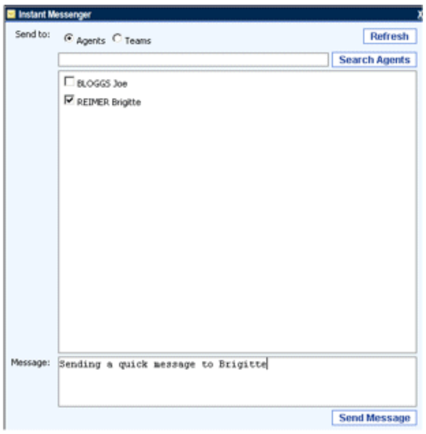
Depending on the user role and permissions assigned to the individual, instant messages can be sent to '**Everyone'** currently logged in to the Synthesys™ Portal or to selected **Agents** and **Teams**.

| Sending option | Description |
|---|---|
| Agents | Shows a list of agents currently logged in to the Synthesys™ Portal, with a checkbox for selection.<br>Administrators can send a message to all or selected logged on agents. Other users will see a filtered list, showing only the logged in agents in their teams or sub teams, or agents in teams of which they are the team manager. |
| Teams | Shows a tree structure of teams with currently logged in users. The team and/or sub-team icons are displayed in colour if any of the users currently logged on to the Synthesys™ Portal are present in that team.<br>Administrators see all teams with logged in agents, other users can only see, select, and send messages to users in their teams and sub teams, or to users in teams of which they are the team manager. |
| Everyone | This option is only available to Administrators and is used for sending a message to all logged in users. |

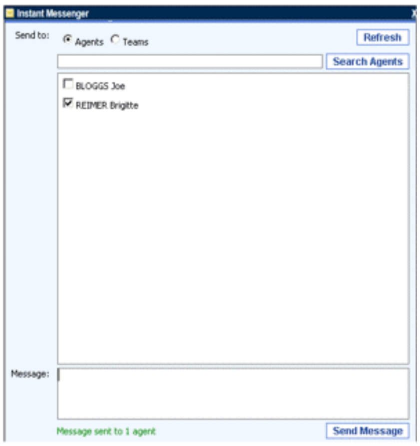
## Sending Messages

To send a message, either to everyone currently logged in to the Synthesys™ Portal (option only available to Administrators), or to selected teams or agents:

- Go to ***Send To*** at the top of the Instant Messenger screen and select either **Agents, Teams or Everyone**.
- Use the **Search** field, to locate a specific agent (A**gents** option), or a specific team (**Teams** option). When selecting '**Everyone',** the **Search** is disabled, as the message will go out to all users currently logged in.
- Select the users or teams that should receive your message.




- Type the details into the **Message** field (max. 200 characters, Html tags will be stripped from the text).
- Click the **Send Message** button to send the message.



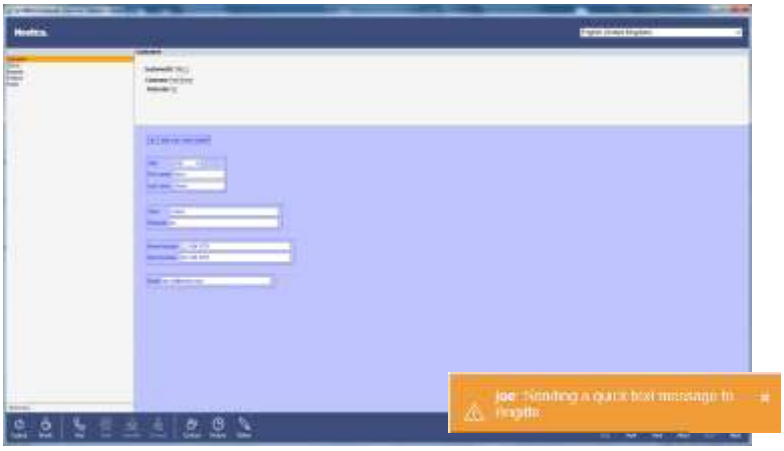

- The confirmation 'Message sent to xx recipients' will be shown to the sender at the bottom of the Instant Messenger screen.

*The message that you send can contain a maximum of 200 characters. The text box can't be left empty, else an appropriate error message is displayed. Any html tags are stripped from the text.*

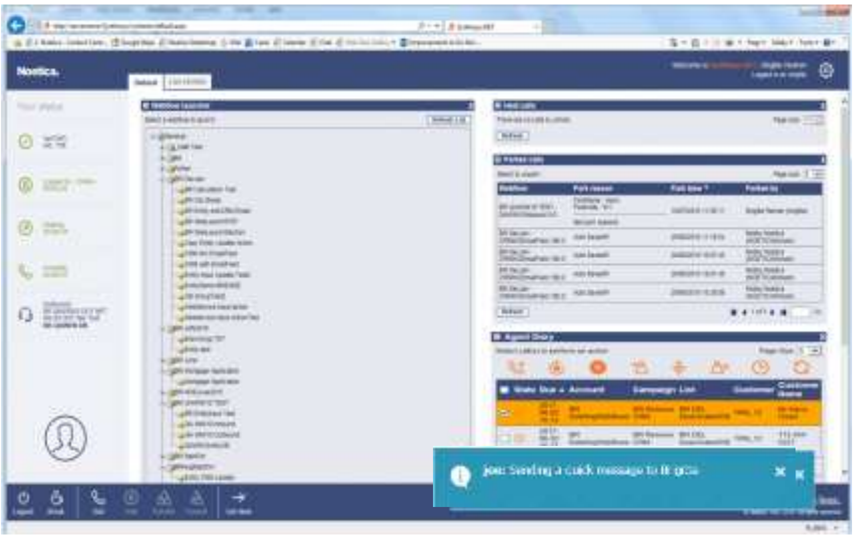
## Receiving Messages

The dispatched message will appear at the bottom right of the Portal screen, allowing the selected users or team members currently logged into the Synthesys™ Portal to read the information.

If users receiving a message are currently in a scripted app taking calls, the message will appear briefly, to notify users of the incoming message.



- Finish the call, to return to the Portal page, where the message is still displayed.
- When you have read the information, click the cross on the right hand side of the message to close and delete the message.



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