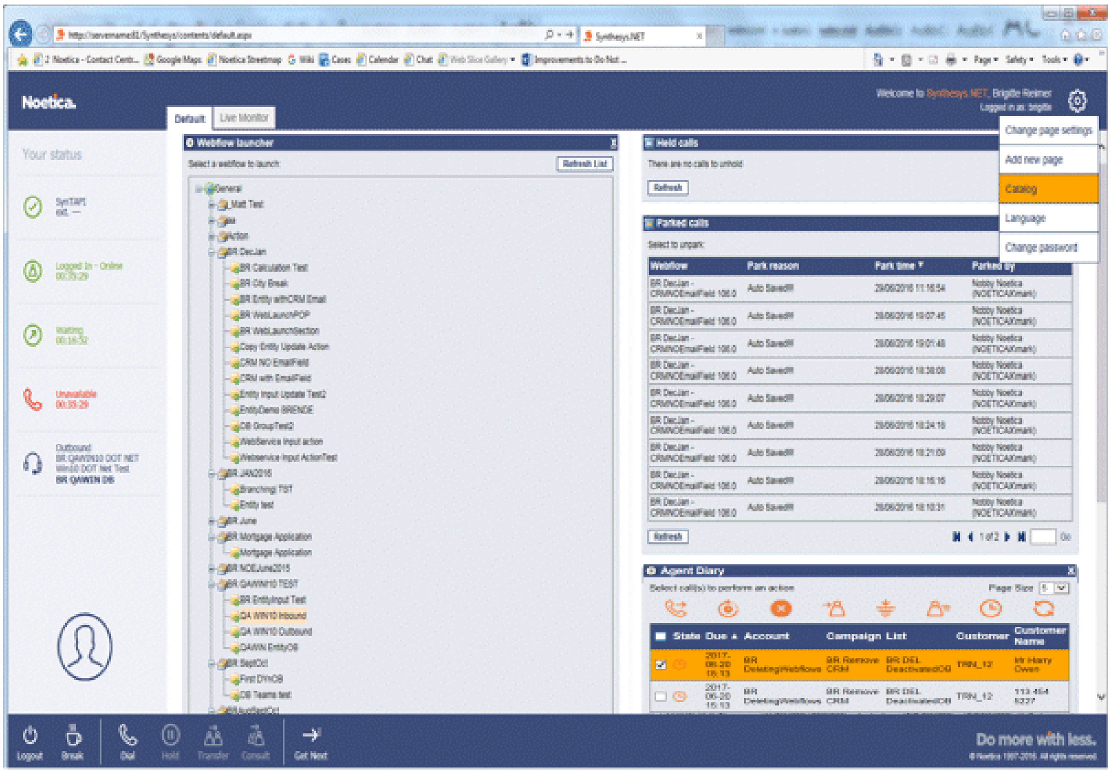
SYNTHESYS PORTAL

WEB BROWSER



SYNTHESYS PORTAL

Last updated October 2019

CONTENT

THE SYNTHESYS PORTAL

Introduction

The Synthesys Portal is used to launch Entity/ CRM websites and to run the associated scripted apps, also referred to as webflows. From the moment the Scripted app appears, until the call ends, agents are presented with all the information they need to handle the call in a knowledgeable and professional manner.

The access available to users in the Synthesys Portal depends essentially on the access permissions that have been assigned to the individual users.

Users with full Synthesys Portal rights will have permissions to manually launch and run all Scripted Apps, including permissions to park, hold, abort calls, open Web Help pages and will be able to view and retrieve parked and held calls and to add and configure new Web pages.

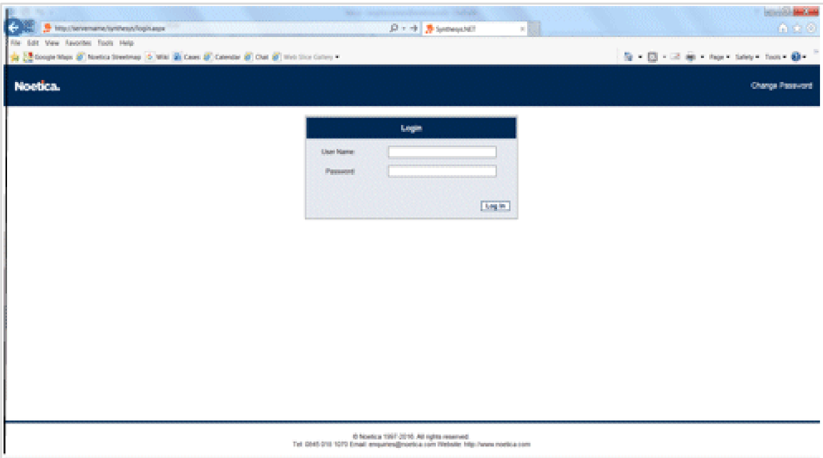
Other users may simply have the required permissions to take calls on selected Scripted Apps, including permissions to park, hold, abort calls, open Web Help pages.

USER LOGIN

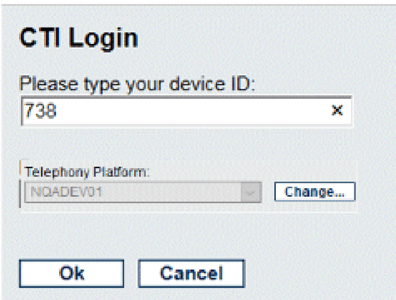
In order to run Synthesys Scripted apps, users need access to a Web Browser.

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 not already displayed, select the Telephone Platform that is to be used from the drop down menu.



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.

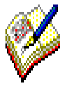
If the CTI Login is not displayed, contact your System Administrator.

If the installation has been configured to use multiple telephony platforms, the platform to log into can be displayed automatically by specifying the Telephony Platform in the Users or Teams Properties section in Synthesys Management Teams.

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.*

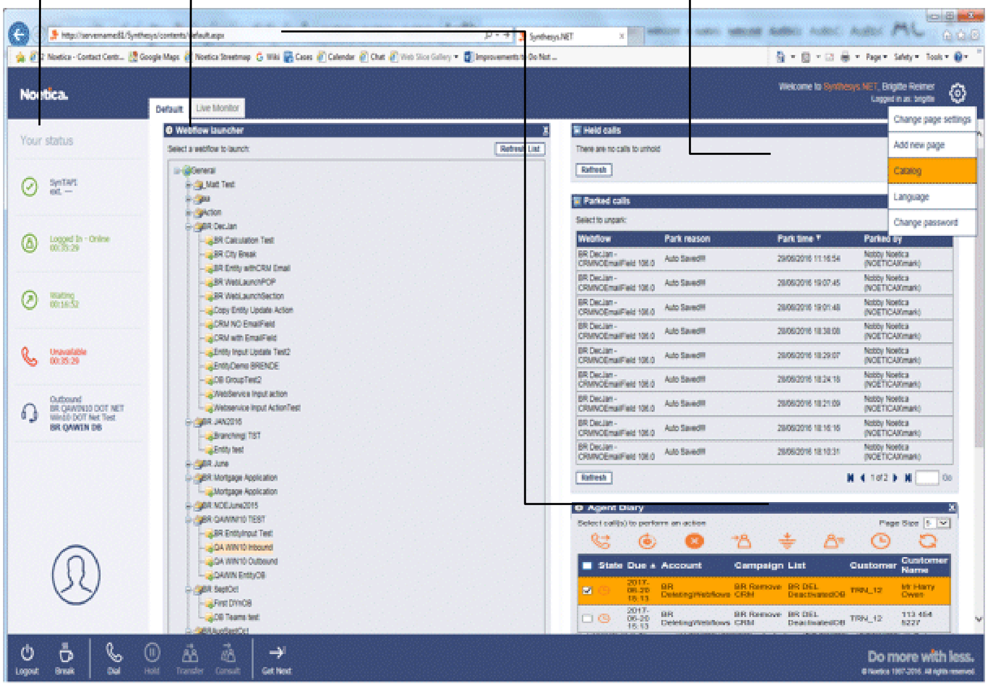
The Synthesys Portal consists of the Agent Status bar, three main toolbars and a number of web parts, depending on the permissions assigned to the user.

Agent Status bar, showing Agent's log in status

Webflow launcher web part, for manually opening scripted apps

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 Portal consists of the Agent Status bar and three main toolbars:

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

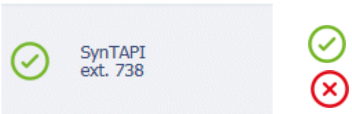
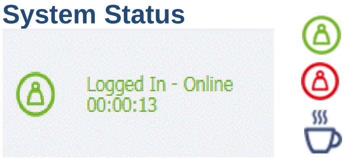
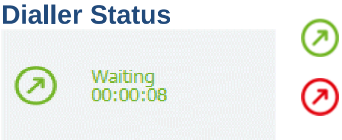
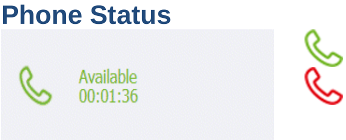
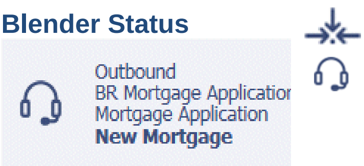
Agent Status bar	Shows information regarding the Agent's log in status, and System, Dialler and Phone status. Most of the information is being obtained from the Live Monitor Service, reflecting information used in the 'Detailed Agent States' tab in the Live Monitor.
Portal toolbar	Consists of three CTI 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 scripted app, 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 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 	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 	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 	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 	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 	Shows the Agent is working Inbound. Shows the Agent is working Outbound, displaying the current account, scripted app and Outbound campaign name. If the Agent is assigned to an Outbound Group, the Group name is displayed, without the account & scripted app name.
	Agent Profile. Placeholder to display Agent specific information. Not available in the current version of Synthesys.

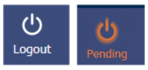
The Portal Toolbar

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

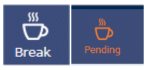
Session   *Telephony*

Toolbar Icons	Description

Session Control



Log out. To log out of the Synthesys Portal.
Pending. Shows that logging off is in progress.

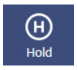


Break. Opens the Break dialog, where the Agent can request a break, change the break reason while still on break, or return to work. Pending. Shows that the Agent is currently on a break.

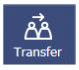
Telephony

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 scripted app 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.

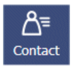
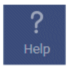
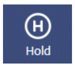
Work control

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 scripted app, 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 scripted app.
	**Hold.** Saves the scripted app information collected and closes script. The Agent state in the Live Monitor will be 'Previewing'. Only the Agent who has put the scripted app on hold can retrieve it again.
	**Park**. Saves the information collected in a scripted app 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 scripted app without saving call data.
	**Back.** Navigation button to move back to the previous page of the scripted app.
	**Next.** Navigation button to move forward to the next page of the scripted app.
	**Submit.** Finish the scripted app 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 scripted app, 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*

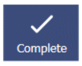
Toolbar Icons	Description
Session Control	Contains the same icons & functionality as described for the Portal and Webflow toolbars.
CRM	Contains the same icons & functionality as described for the Webflow toolbar.
Script Navigation	Contains the same icons & functionality as described for the Webflow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

Telephony/Transfer

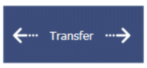
Swap Lines. Only available for consultation calls. Allows the Agent to alternate between the customer and the consultation call.

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.

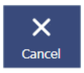
Hangup. To disconnect and end the current call.



Complete. Complete the Consultation or Conference call.



←Transfer→ Icon to show that a transfer is in progress.



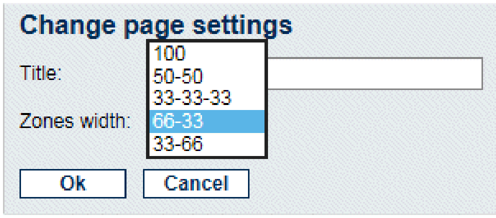
Cancel. Cancel the Consultation or Conference call.

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) using the Catalog option, set the Portal language and change their login password.

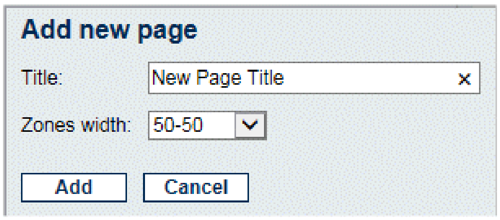
Changing Page Settings

- 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 scripted apps in the Synthesys Portal, agents can set any language, as required, both for the Portal and specific scripted apps, thus displaying the Portal language and scripted app information in any desired language.

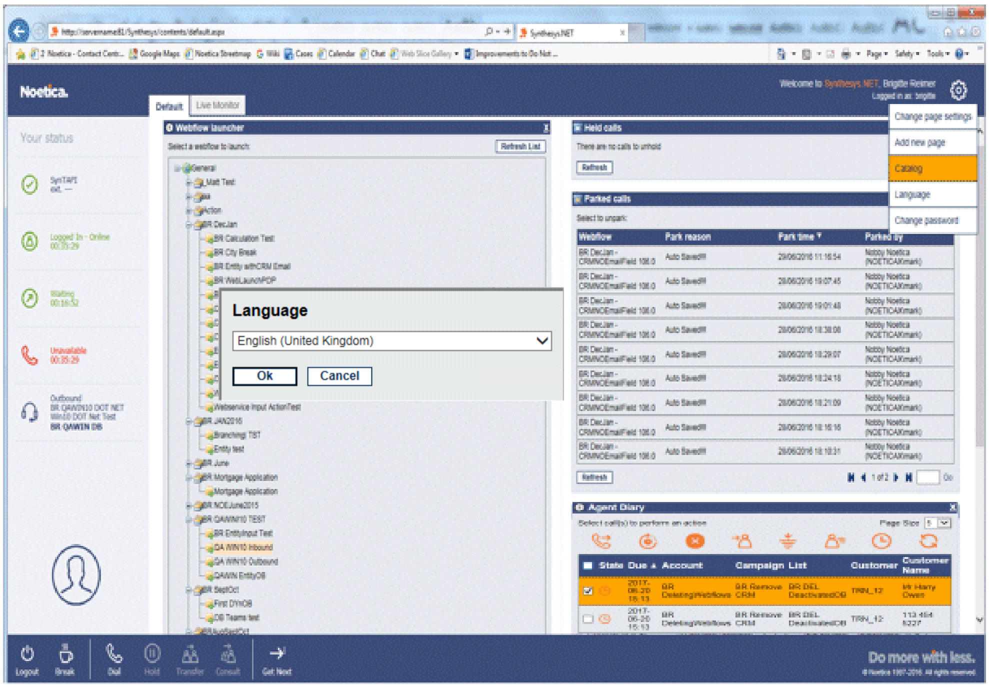
If no translation is available for the selected language, then the default language will be used in the Portal.

If no translation is available for the selected scripted app, the default language of the Scripted app will be used.

Setting the Portal Language

To set the language for the Synthesys Portal

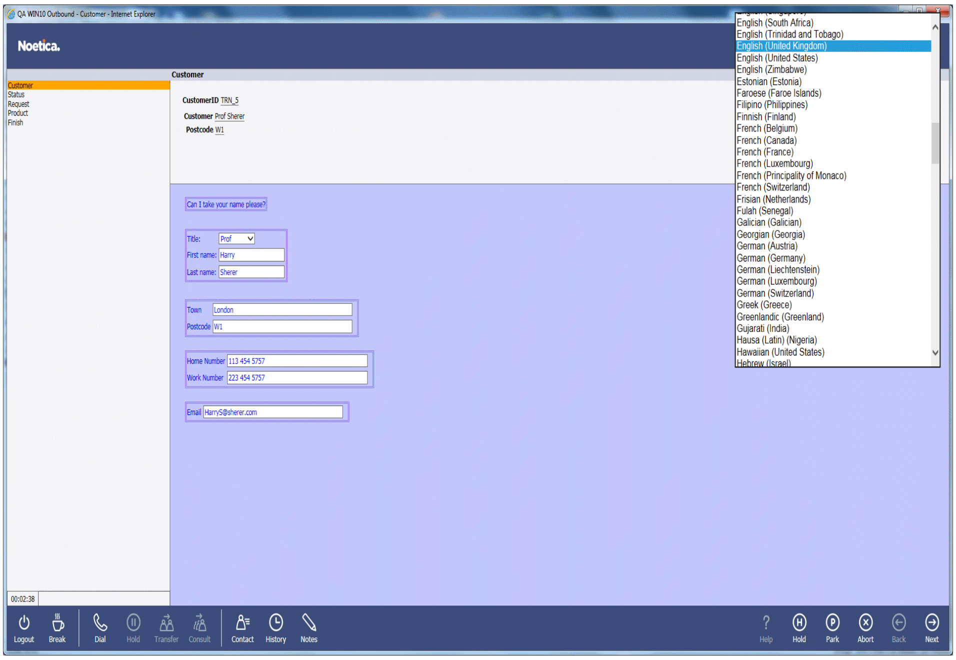
- Go to the **Settings** icon at the top right of the Portal screen and select ***Language***.
- From the *Language* drop down list, select a language, as required.
- The language now used in the Portal will change accordingly.
- If no translation is available for the selected language, the default language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



Changing Scripted app Language

To set the language for the scripted app

- Select the target language, as required, from the drop down list at the top right of the scripted app screen.
- The language used in the scripted app will change as soon as you press ***Next>*** or ***<Previous*** to navigate to the respective page in the scripted app.
- Any scripted app 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 scripted app will be used.



CATALOG OPTION: 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.

Remember 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 Scripted apps.
Held calls	Display a list of *Held* calls. Scripted apps 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. Scripted apps can be parked with the call data collected. Any agent with access to the parked call list can retrieve parked Scripted apps 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 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 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 section Synthesys Portal Web Parts at the end of this manual.

SYNTHESYS SCRIPTED APPS

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 customer histories, providing you with the best possible help in dealing with customers' queries and requests.

Each screen in the scripted app 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 scripted app 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 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 scripted app and make the necessary changes. All previous data that has been entered and is still relevant, is retained. Moving forward in the scripted app, you are presented with the next logical question relevant to the amended data, enabling you to move through the scripted app without ever having to input the same information twice.

Launching a Scripted app

Having logged into the Synthesys Portal via the Web Browser, the correct scripted app is automatically launched when a call is routed through to your workstation.

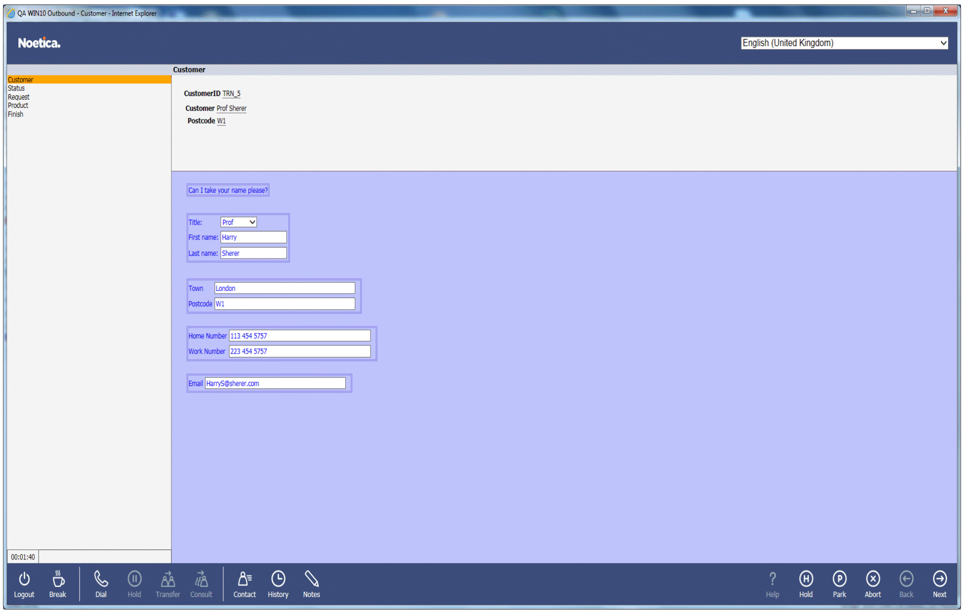
*For **Inbound calls**, the system launches the scripted app by comparing the telephone number dialled with the DDI numbers stored against each released scripted app.*

*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 or as part of the dashboard, if associated calculations and parameters have been created in the Synthesys App Studio.*

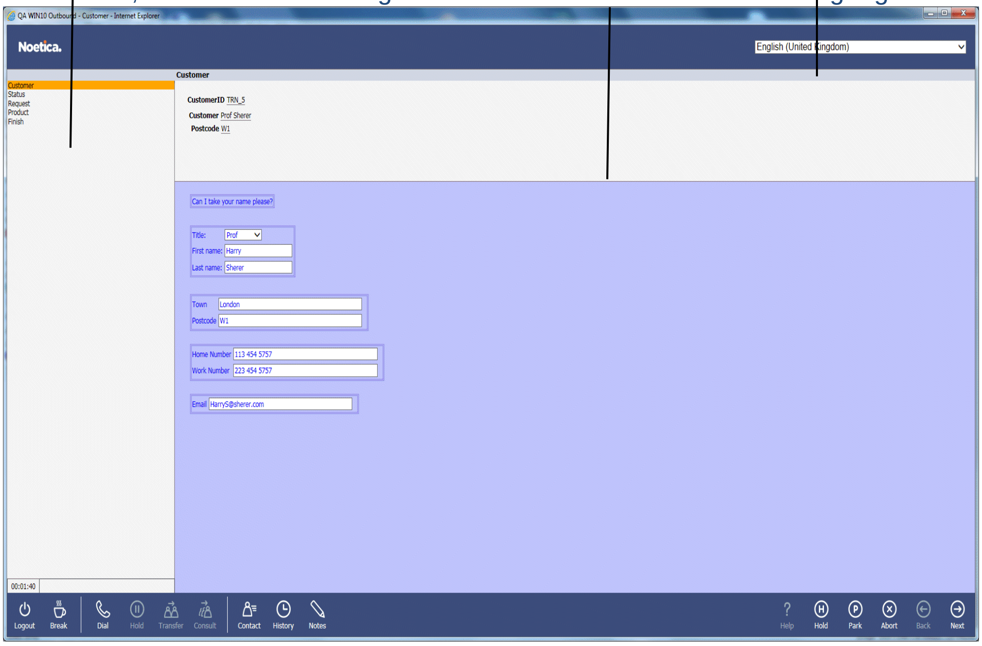
The next page describes searching for customer details when taking Inbound calls.

SCRIPTED APP MAIN SCREEN

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

The way the Scripted app 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.

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



CTI Toolbars   Script Navigation Area

The Scripted app consists of the following areas:

Section Area	Displays the section headings of the Scripted app
Dashboard	Customizable, displays at the top of the Scripted app screen selected information from the CRM and Scripted app 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 shows a CRM toolbar, if CRM/ Entity data is used.
Navigation Area	Enables agents and users to move through the Scripted app

Entity Control in Scripted App

If the sripted app has been designed to contain an Entity control, the customer record will be displayed automatically in the Entity control when taking Outbound calls, or if CLI is enabled and the customer calls from a recognized telephone number.

Searching for Customer/ Entity Records

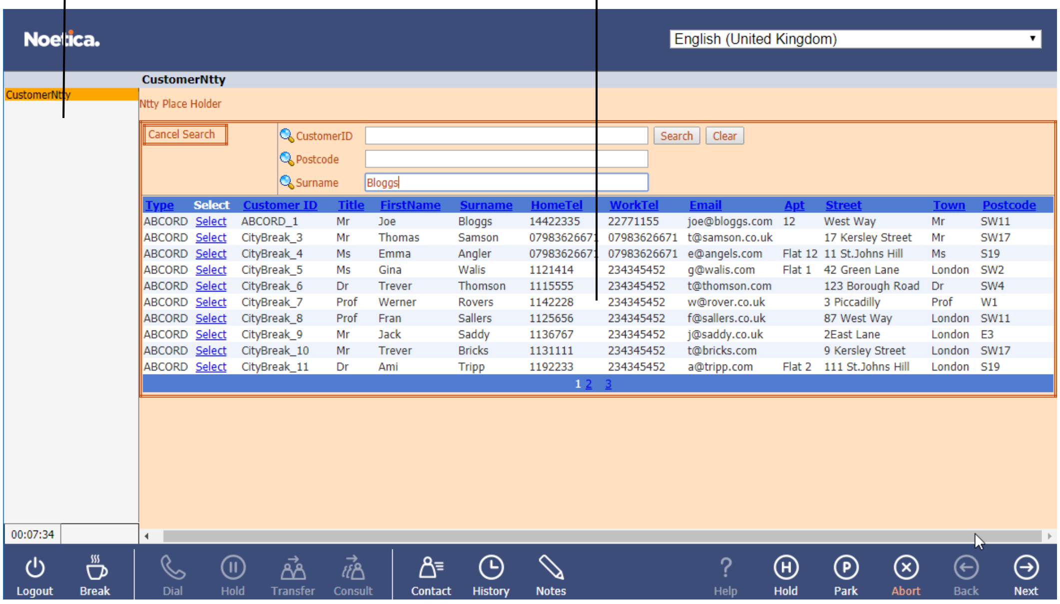
When handling Inbound calls and customer details are not displayed automatically, you will be able to search for existing customer records using the available **Search** fields.

The appearance of the ***Entity*** control will reflect its configuration at design time.

- Enter any known details into the Search fields displayed, such as a customer ID or Policy Number, a surname and/ or postcode.
- Click the **Search** button on the right of the Search fields.
- If multiple customer records are returned for your search, select the relevant customer from the list displayed and click the **Select** link.

Section Area, with Section headings

Search fields, specified at design time



CTI toolbar

CRM Toolbar

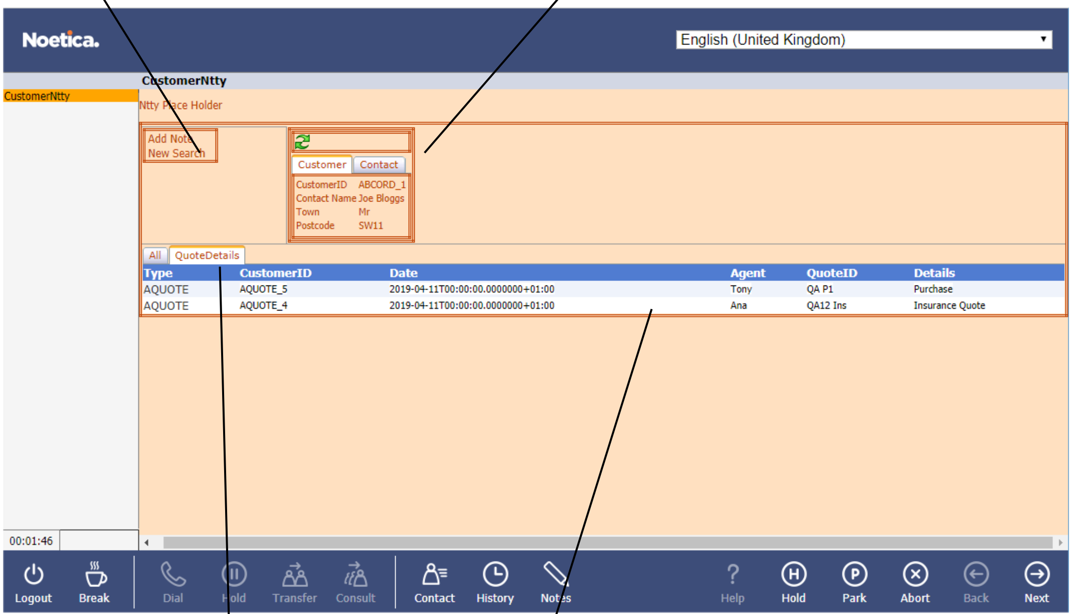
Navigation Area

Viewing a selected Record

With the customer details displayed, the appearance of the Entity screen again reflects how the Entity control was configured at design time in the *Presentations Editor.*

Toolbox	Options can include ***Search*** to allow the return to the initial search page, ***Add Note, Attach Document*** and **Launch Website or Scripted App**.
Section tabs	Displaying any tabs and associated *CRM Entity* information, as configured at design time, in the Entity *Presentations Editor*.
History tabs	Displaying any tabs and associated *CRM Entity history* information, as configured at design time, in the *History* page of the *Presentations Editor*.
History event section	Showing all or selected historical *Entity history* events, as specified in the Entity *Presentations*.

Toolbox, fields specified at design time. Section tabs with associated *Entity* information.



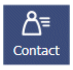
History tabs. History event section

VIEWING CUSTOMER DETAILS

Customer Details

When using CRM Entity data, you can view customer profiles via the **Contact** icon.

If the Allow Entity Edit option has been enabled for the scripted app when designing the webflow, you will also be able to amend existing customer details throughout the call, whenever required, using the Contact button on the Webflow toolbar.

- To view (or edit, if enabled) customer details, click the **Contact** 

icon on the *Webflow* toolbar.
- Edit any fields as required, then click **Save** button to update the amended fields instantly or **Cancel** the action without saving the changes.

Customer Details

Customer ID	ABCORD_1
Title	Mr
FirstName	Joe
Surname	Bloggs
HomeTel	14422335
WorkTel	22771155
Email	joe@bloggs.com
Apt	12
Street	West Way
Town	Mr
Postcode	SW11

Close

Customer History

- Click the **History** 

icon on the Webflow toolbar, to view historical information associated with the customer record displayed.

Customer History

98	14/08/2019 16:33:01	brigitte	Outbound Managed Change State	Call 1421 Changed State to Queued
96	14/08/2019 16:31:51		Predictive Dialler	InvalidNumber
93	14/08/2019 16:14:18	brigitte	Outbound Managed Change State	Call 1421 Changed State to Queued
85	14/08/2019 16:11:09	brigitte	Manual Webflow [-]	ABC Order
48	29/03/2019 14:29:14	brigitte	Manual Webflow [-]	ABC Quotes
42	29/03/2019 12:01:19	brigitte	Outbound Webflow [-]	ABC Order

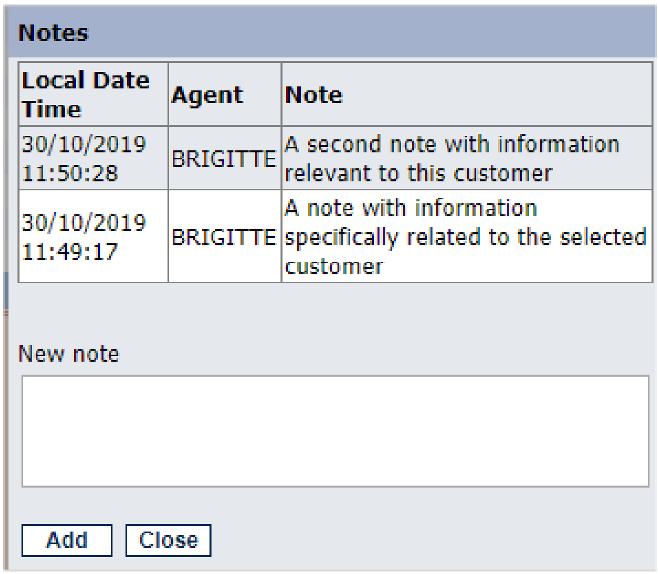
Close

Adding and Viewing Notes

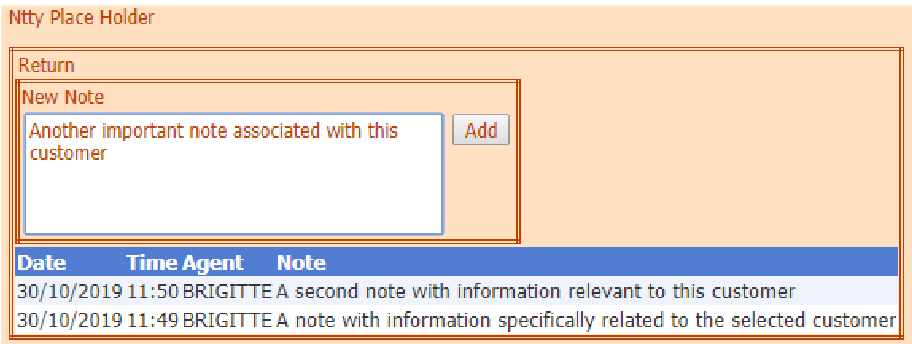
Notes can be added using the Notes icon on the Webflow toolbar or by using the Add Note option on the Entity (Ntty) control, if this was enabled at design time.

To add notes containing information associated with the selected customer

- Click the Notes  icon on the Webflow toolbar.
- Enter the note or comment relevant to the selected customer into the **New note** text field.
- Click the **Add** button to add the message or click **Close** to close the dialog without saving the message.



- Alternatively, click the **Add Note** option on the Entity (Ntty) control.
- Enter the comments for the selected customer into the **New Note** text field.
- Click the **Add** button to add the message, then click **Return**, to return to the Entity control.

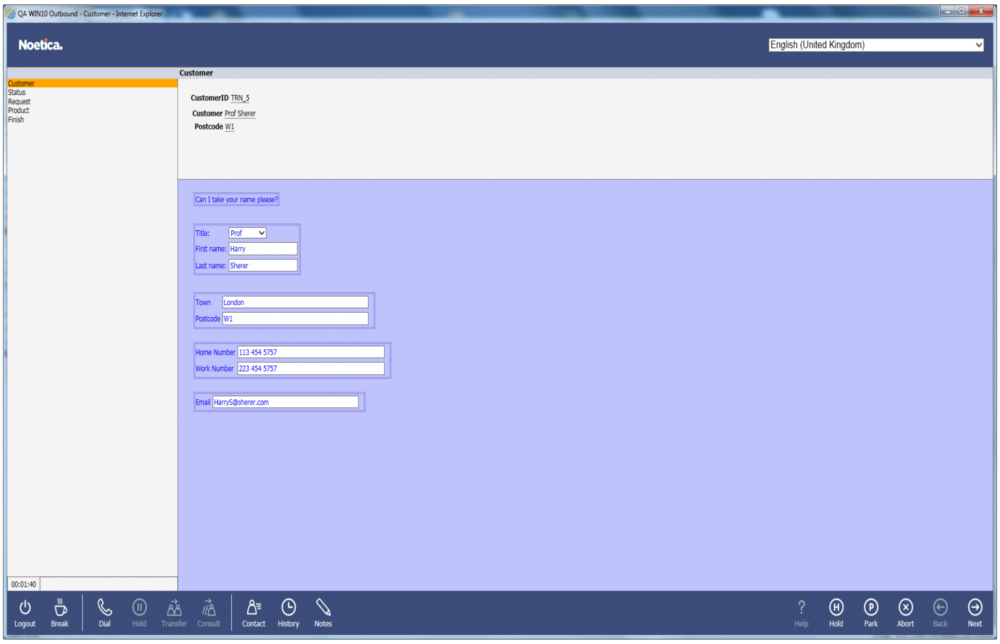


- To view existing notes, or to enter further comments, as required, select the **Notes** icon or **Add Note** in the Entity control, as above.

AGENTS DIALOG 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.

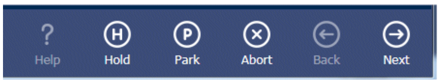


The text prompts can be the actual dialogue that should be spoken, or prompts to help you to recognize areas of the scripted app that need special attention. To highlight the difference, different colours and font sizes are typically used.

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

NAVIGATING THROUGH A SCRIPTED APP

To move through the Scripted app, 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 Scripted app, 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 scripted app, click on **Back**  .

Completing a Call

When you are in the last section of the scripted app, the **Next** button changes to **Submit.** Click  **bmit** **,** to finish the call and submit the data collected to the database.

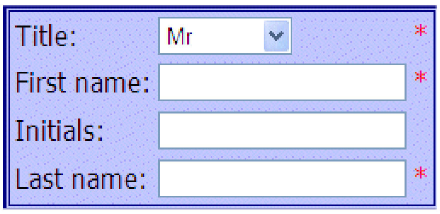
Moving between Questions

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.*



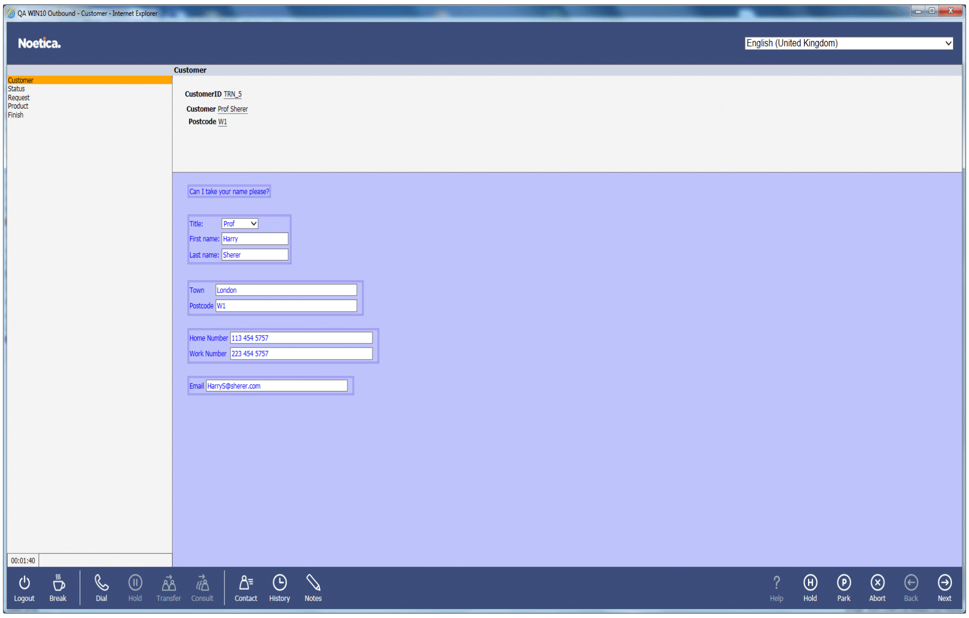
To move forward between these fields, press the *Tab* key on your keyboard. To move backwards through these fields, press *Shift + Tab*.

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 Scripted app, *Section Titles* will be displayed on the left side of the web page.

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



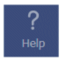
When moving backwards and forwards in the Scripted app, all relevant information that you have entered will be retained.

Web Help Pages

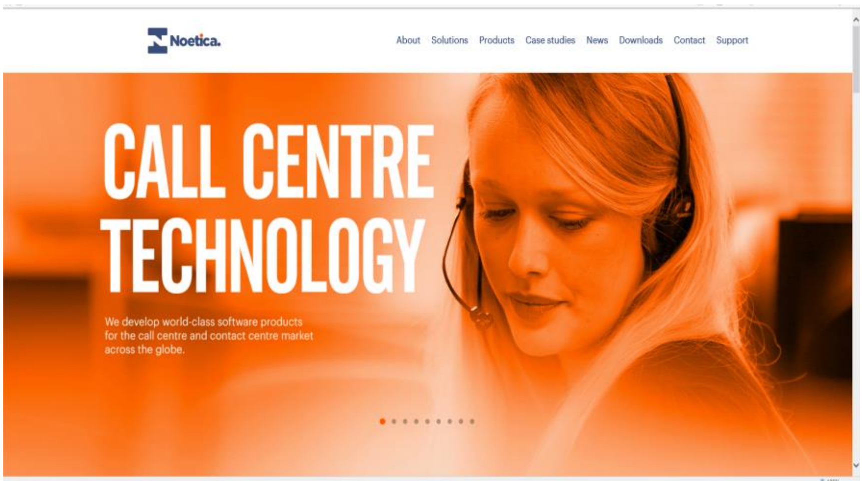
Help pages can provide additional information regarding a company, its products and services.

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** 

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 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 Scripted app 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 Scripted app and access the information previously collected.

Parked calls

Select to unpark:　　Page size: 5

Webflow	Park reason	Park time	Parked by
BR DecJan - CRMNOEmailField 95.0	xxxxxxxxxxxxxxxxxxxxxxx	18/03/2016 16:08:59	Kim Constantine (NOETICAX\kim)
ChrisB - Test 2.0	with active call	27/03/2015 12:21:00	chris b (chrisb)
BR QAWIN!10 TEST - QAWIN10Inbound 6.0	will call back with extra info	06/06/2016 16:59:00	Brigitte Reimer (brigitte)
BR SeptOct - FirstDYnOB 4.0	un-parking and parking call	01/05/2014 16:58:38	Brigitte Reimer (brigitte)
BR DecJan - CRMNOEmailField 95.0	testing1000000000	23/03/2016 10:25:40	Kim Constantine (NOETICAX\kim)

Refresh　　1 of 9　　Go

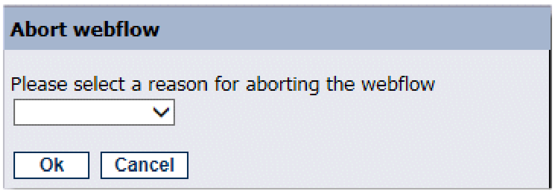
Run parked or held calls

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

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

Aborting Scripted apps

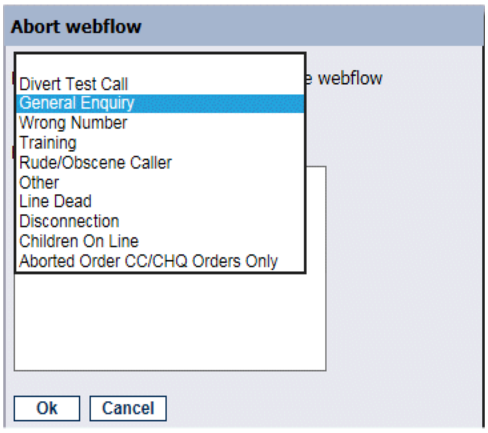
T exit your Scripted app without saving the information entered, click the **Abort** option on the *Navigation* toolbar, to open the ‘Abort’ window.



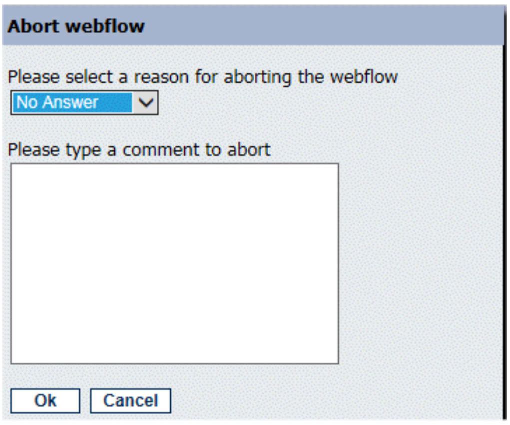
Open the drop down menu and select the reason for aborting the call. If required, enter further information in the text box now displayed.

Click ‘**OK**’ to Abort the call.

Abort Options Inbound



Abort Options Outbound



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

To return to the scripted app without aborting the call, click ‘**Cancel**’.

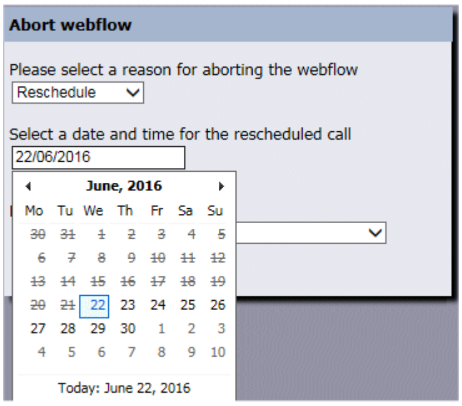
Reschedule and Special Reschedule

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

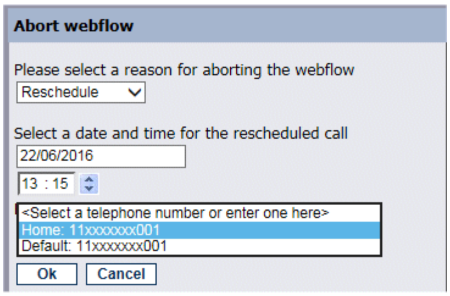
- Click the Abort option, and in the *Abort Webflow* dialog select ***Reschedule*** from the drop down list.
- Select **Special Reschedule (**or similar, depending on the entry in the *Outbound Abort Reason* section), to reschedule a partly completed scripted app, retaining the information collected 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.
- Specify the time for the callback.



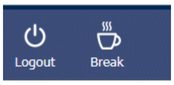
The ***Reschedule/ Special Reschedule*** dialog, depending on the set-up, either simply displays the last number dialled or, if Reschedule Flags are enabled, allows you to select or enter a telephone number for the callback.



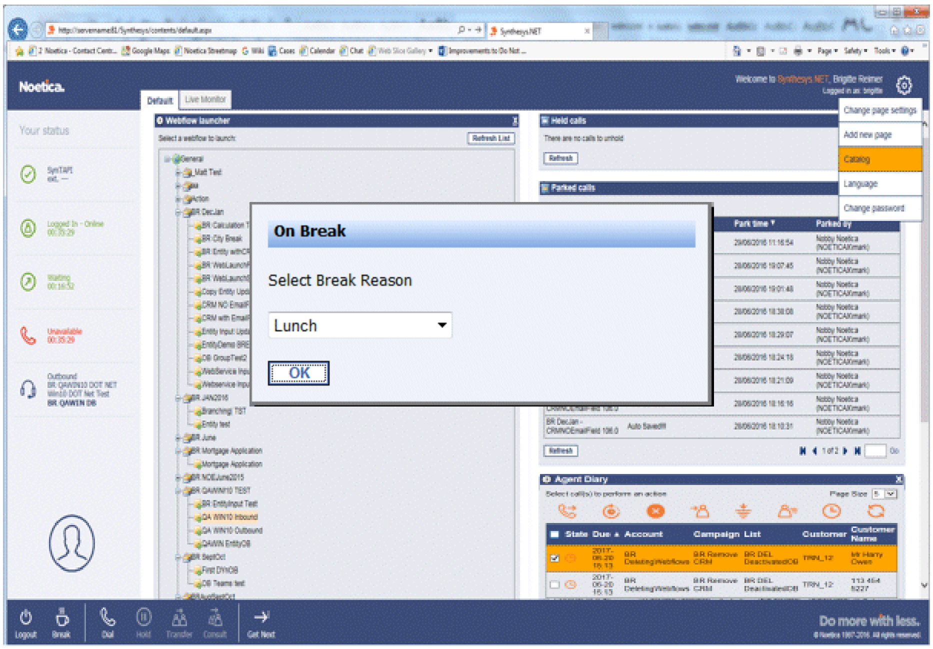
A scripted app that was aborted using the special reschedule option, when re-presented to the agent, will open at the point at which it was rescheduled, still containing the details collected. Agents can then finish the partially completed call, without having to re-enter the information collected previously.

Going On Break

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

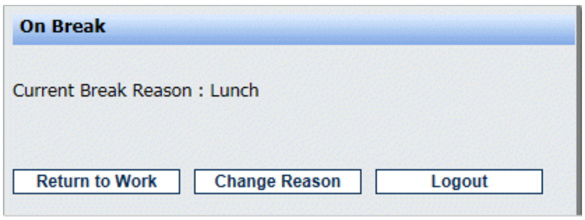


- Click the **Request a Break**  icon on the ***Session*** toolbar***,*** while still in a call.
- After you have completed or aborted the current call, the **On Break** dialog will open.
- If the ***On Break Reason*** function is enabled, select the reason for going on break from the drop-down menu,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



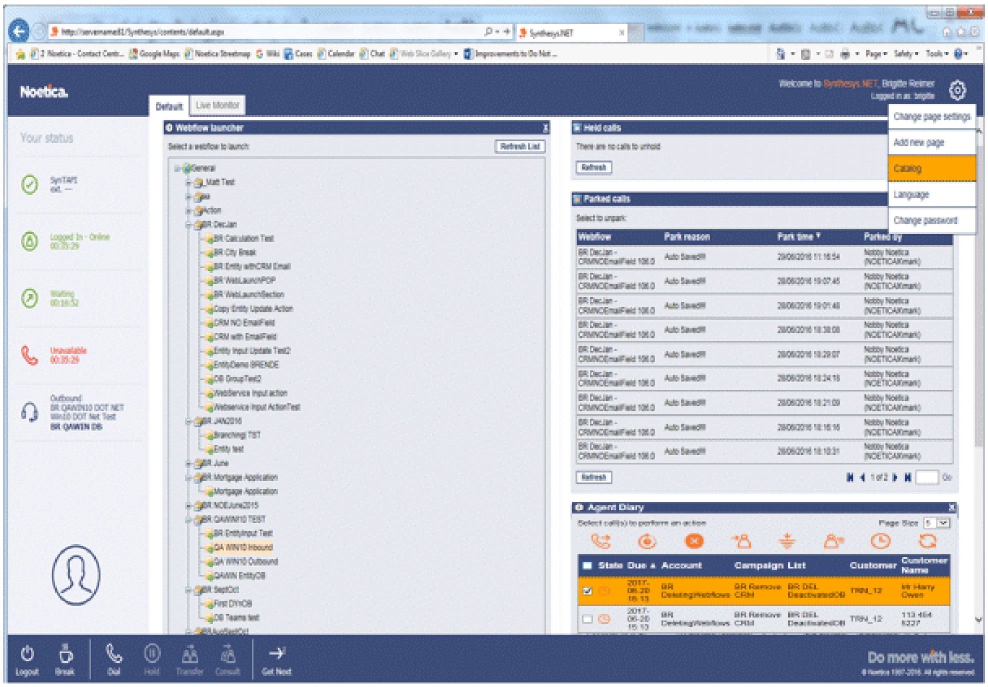
USER LOGOUT

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

- Click the **Logout** 

icon on the Portal or Webflow toolbar
- The **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.