Portrait Dialogue

Telemarketing User Guide

Version 6.0 SP1

Pitney Bowes Software

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- The circumstances in which the problem arose
- What error messages you saw (if any);
- The version of the software that you were using.

Pitney Bowes Software Inc.

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Basics

In this section:

TM Web - Basics

This chapter introduces the basic concepts underlying TM Web. Besides a few important terms, you learn how to start the application and how its windows are organized.

If you are an experienced windows user, you will probably find that once you grasp the general principles in this chapter you wont have any further need for this documentation.

Starting TM Web

TM Web supports two login types. The two login types are: Normal login and Automatic login. When Normal login is enabled, you have to manually type in a username and password. Automatic login does exactly what the name implies. You do not have to enter a username and password and are instead automatically logged on to TM Web.

Normal login

1. To start the TM Web, double-click this icon on your Windows desktop:

   

   Or

   Start the program from the favorite list in your web browser:

   - Choose **TM Web**.

   (PS! Your organization can also have included a link to the TM Web from a portal or intranet)

2. Type your user name and password (obtained from your system administrator.)

   When you log in, the system will display stars instead of the password you type.

3. Click **Log in**.

Automatic login

When automatic login is enabled you do not have to supply a username and password. You are automatically logged on to TM Web as the user you logged on to windows with. However, this requires that your windows user have access rights to TM Web.

1. To start the TM Web, double-click this icon on your Windows desktop:

   

   Or

   Start the program from the favorite list in your web browser:

   - Choose **TM Web**.

2. TM Web opens on the page configured as the startup page.

   Note: If your windows user does not have access rights to TM Web then your are presented with the same login page as shown under Normal login. If you have been supplied with a username and password to use specifically in TM Web, then you can enter these here.

Starting TM Web - Advanced log in

1. **INSTANCE**. When logging in to the TM Web, the system can be set up to give access to different instances. To access this option, click on the button **Advanced** in the right lower corner. The window will expand and a drop down box will show available instances. Select the wanted instance and continue log in.
2. **CACHE**. In order to speed up the performance in TM Web, domain data is cached on the Web server. When the System Administrator does changes in the domain data, data cache has to be deleted. To access this option, click on the button **Advanced** in the right lower corner. The window will expand and a check box will give access to delete cache on the web server. Check the box and continue to log in.

Remember that user name and password are personally and shall not be shared with other persons!

Finding your way around TM-WEBs windows

TM Web is a web-based application and runs in the same kind of window that you are familiar with from other windows applications. When you start TM Web a new window will be opened.

What you will find in the main window:

- On the left side is a menu that lets the user access:
  - **Projects**
  - **Reports** (dependent upon permissions)
  - **Settings** (user set up)
  - **Help** (opens this document)
  - **Exit** (will exit TM Web)
- In the main window there is a project overview that gives the user access to available projects (call customer and/or register response) and details regarding each of these.

TIP!

If you are running the TM Web when opening a second web link, this link can be opened in the same window as the TM Web. In order to avoid this, first open a new browser window before starting the second web link.

Search window

In TM Web the information is organized in a few main windows where the search window is the most important. Here you will information like:

- Project

- Project status
- Search criteria to find a customer

The search window has a menu on the left side to give an overview of the project. See the next chapter (**Detailed description of the TM Web**) for information on how you search for customers locked, assigned to you or on recall.

TIP!

For the most efficient use of the application, we recommend that you use the <TAB> function to move the cursor from field to field. In a window, if you press the key <enter>, Dialogue Server will execute the command that is activated (shown with a darker frame around the button)

"Flying start" for the TM Web

This section will give a short introduction to practical use of the application. Next chapter contains more in-depth details of the system.

Choose TM-project

- Log on to the application
- Choose a project to work with from the project list by double clicking the project.

Call customer

- In the search window, click Fetch Next
- The application will now search for the customer who is to be called and will show customer information in the left menu. The answer form is shown in the middle of the window.
- Call the customer
- Register answer while talking to the customer.
- Use scroll bar to move downwards in the answer form.
- A questionnaire can have jump functionality implemented on some of its questions. This will simplify use of questionnaires in order to help the TM operator remember when and what question to skip.

For example, on question 1, answers alternative A, you can implement jump to question 5. This means that the application will move focus from question 1 to question 5 when alterative A is chosen.

Complete call

- After a successful call, select the Post button below the answer form.
- The application will now save the customers answers and returns to the search window. In order to continue with next call, select the Fetch next button.

No answers from customer

If the customer does not answer or he is busy and wants to be recalled, do the following:

- In the menu to the left, select End call
- Choose suitable reason for why the conversation is not completed.
- Select the Post button

Next chapter will give a more detailed introduction to functionality in the application and will explain how the different non-completed-call reasons will affect the calling queue.

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Details

In this section:

Detailed description of the TM Web

Overview of the menu

The TM Web menu should by now be familiar. Your menu choices are dependent upon where you are in the application.

The **main menu** is always visible to the left side of the application. The menu consists of two parts (or three if any reports are available):

1. Customer information
2. Call status
3. Reports menu (only shown if reports are available and you have the appropriate access rights).

Questionnaires are always situated in the main window. The questions are placed in a list. If the questionnaire consists of many questions, you must use the scroll bar to access all the questions. Remember that a question can have jump functionality implemented.

Menu	Command	Function
Participant info	Customer info	Shows customer details or the current customer.
	Edit	Gives access to edit customer information as name, telephone number and email address. Which fields allowed to be edited are set by the system administrator and using this functionality is depending upon having sufficient permissions for the TM operator The button will open a new edit window.
Call status	Call number	Shows the number of times the customer has been called fin this TM project.
	View call log	This is only shown if the customer has been called earlier in the same project. The button will open a new window that contains a log of when the customer has been contacted, who contacted him or her and comments from the operator who performed these calls. If the log opens, the button text will change to "Close call log". Click the "Close call log" to return to the customer window.
	Cancel call	Opens a new window where different choices for call status can be set. For details look for separate description. If "Cancel call" is chosen, the button text is changed to Questionnaire. Click the "Questionnaire" button to return to the customer window without cancelling the call

	End	Ends the call and returns the customer back into the calling queue. PS! This function does not record a new customer contact and will not be shown in the log or increase the amount of calls.

Search for a customer

Before a customer can answer a questionnaire, you first have to search for a customer in the database.

In the TM Web you can search for customers in many different ways. This section will show you how the most common searches are performed.

How do make an automatic search

1. Choose the desired TM project.
2. Click Fetch next or click <enter> on your keyboard.

   The application will now return the next customer to be contacted. The application will choose the customer using the following rules of priority:

   1. Customers marked as: Wants to be contacted by me and the next call date/time is in the past.
   2. Customers marked as: Wants to be contacted and the next call date/time is in the past. (Does not belong to a specific TM operator).
   3. Randomly picked from the TM call queue.

Note: Automatic search should only be used to optimize search time and to secure that customers in the call queue waiting for call back will be handled at the correct time and by correct person.

How to do a more specific search

The TM Web lets you pick a customer based on certain fields in the customer database. It is possible to perform a search using multiple fields. If the search result is too big, it is recommended to refine the search by adding more criterias and rerun the search.

1. Choose the desired TM project.
2. Fill in values in one or more fields. For example:
   - Fill in P in the last name field to find everyone who has a last name beginning with P (Paulsen, Pedersen, Pran, etc.).
   - Fill in E in the first name field to find everyone who has a first name beginning with E (Egil, Elin, Else, Espen, Eva, etc.).
   - Use combo boxes to choose fields like sex and status fields
3. Click Search.
4. You will be shown all persons qualifying your search criteria.
5. Double click a line to open the desired customer.

Locked, assigned to you or on recall

In the search window there are three check boxes to use before performing a search, **"Locked by you"**, **"Assigned to you"** and **"On recall"**.

Locked by you

When a customer is picked out of the calling queue, he is locked in the application with status set to Locked by you, so that no other TM operator can open the same customer at the same time. When you finish the call, the answers will be saved and the customer is unlocked in the application.

There are few exceptions where the system is unable to release the customer locks. These are:

- You lose connection between your PC and the network while working with a customer. This can happen if you lose electrical power or your network connection is broken.
- If you open up a customer in order to call him or her, but leave you computer to take a break before the call is completed, the system will, for security reasons, disconnect your session after a given time with no activity, and the lock will still be in the system.

If the left menu below **Project status** shows customers locked by you, you will have to search for these customers. Check the box **"Locked by you"**, and click the **Search** button, and the system will return the locked customers.

In order to ensure that a customer does not remain locked for a long time, there is standard functionality in the TM Web that checks which customers are locked and release all lock older than a given time. Default configuration is 1 hour.

Note: The system administrator can change the configuration of 1-hour lock to suit the use in your organization. Ask your system administrator if you are not sure of the current setting for your system.

Assigned to you

If you try to contact a customer and fail to get hold of him or her, set the status to Call later. The customer is then put back into the call queue and will only be available for a new call after the date/time that is agreed upon. In TM Web it is also possible to register who should contact the customer. You here have two choices:

- **By anyone**. Here the customer will be put back into the calling queue and will be available for all TM operators in the current project.
- **By me**. Here the customer will be put back into the calling queue, but only you will be able to recall him or her when the recall date/time is reached.

Note: If you use the **"Fetch next"** functionality, TM Web will always check whether there are any customers assigned to you and prioritize them before other customers in the calling queue.

On recall

If you check this box, only customers that has already been called and marked to be called back (recall) will be returned.

Wild cards (*) let you search for more

The character < * > works as a joker or "wild card" when searching in a text field. The character can also be used in searches for telephone number, because telephone number normally is a text field.

If you know that the customer’s name starts with Jo, but you cannot remember how it ends, you can use wild cards like this: Jo*

TM Web will find customers like Johannes, Johansson, Johnson, etc.

It is also possible by default to make all criteria using wild card. By doing this, you will not have to remember this every time you make a search. By clicking on the "User setting" in the start page, check the wild card box in order to activate this functionality.

You can use * before or after your value. Keep in mind that using * before a value usually makes the search take lots longer, because TM Web can not use its indexes to speed up the search.

Comparatives < or > when searching for numbers

In fields that contain numbers, for example the Customer ID field or the Bonus points field, you can use the < or > symbol to search for all customers with a number below or above the given value.

For example, search using >2000 in the Bonus points field to find customers with more than 2000 bonus points.

Upper or Lower case in searches

When you type values to search for, remember that **"Dave"** is not the same as **"dave"** or **"DAVE"** to your computer. Searches in databases are depending on the type of database your organization is using. When using Microsoft SQL Server, the database will normally return the same result if you search for **"andy"** or **"ANDY"** in the field first name. Check with your system administrator how your system is handling upper and lower case in searches.

Drop-down list: Search on values

Some fields contain standard values. (E.g.: Country, county, address type. martial status and sex) A Drop-down list can be used to simplify the search.

A search on Marital status

All fields that have a Drop-down list available will be recognised by a black arrow within a grey box on the left hand side of the field. To use the list:

1. Click on the black arrow within the field.
2. The resulting window will offer a complete list of values. If the list contains a large number of values, a scroll-bar will be shown on the right-hand side. Use the cursor to move up and down in the list.
3. Select one of the values with the cursor and click.

The field will now contain the selected value.

If you don not want to restrict the search to one of the available values, click on the top of the list (blank field) and you will return to the search window without a value in the field.

Note: If you can not find a value necessary for a search in a drop-down, contact your system administrator to check if the list can be expanded with the needed values.

When you have found many customers

If you have searched for all customers who have a last name starting on A and found a list of several hundred. TM Web will not show all customers, but depending on your search setting, show the first 25/50/75 or 100 customers matching the criteria. The following tip can be of use when searching for the right customer:

- If you are searching with B in last name, try to write more of the name. E.g.: try to write Bro in order to narrow the search (Brook, Brown).
- If the list is still to long, add more criteria. E.g.: combine last name with first name, add address or phone number.

- If you get to many persons in the search result list, use the scroll bar to move up and down in the list.

Edit customer details

If the customer details shown in TM-WEB is not correct, and you as a user have the permission to update customer details, follow these steps:

1. From the questionnaire page, in the left menu showing Participant info, click Edit.
2. A new window will open.
3. Change the customer details as needed or add information missing.
4. Click Ok.

Your system administrator controls, which fields that, the users can update. Fields can be shown in the window Participant info, but still not be editable.

If you do not have access to edit customer data, the Edit button will not be shown in the menu.

Closing a call

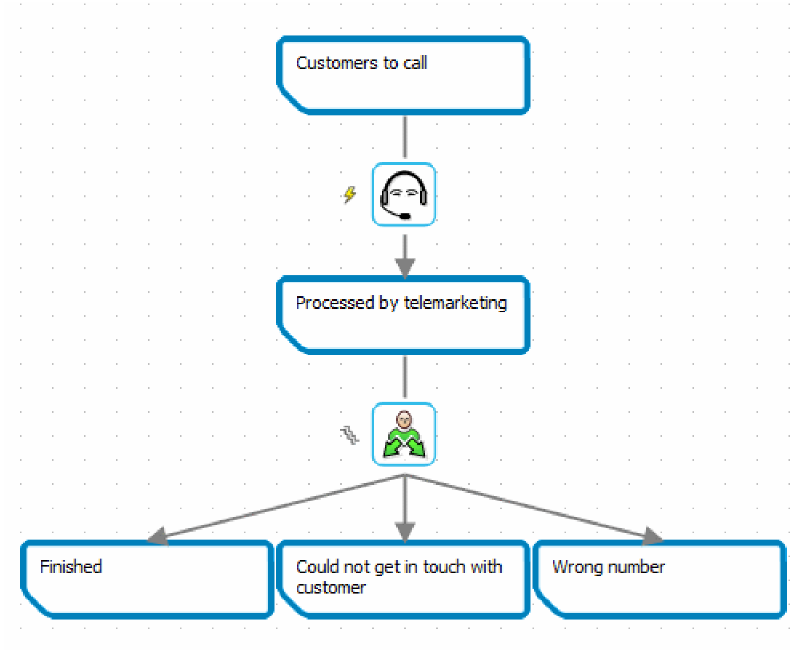
TM Web is an application that provides an overview of all customers that should be contacted. It is important that the correct status code is used if call is closed without being completed. The use of status codes determines when and how a customer is contacted the next time.

Queue system

A customer is included in a TM-project by Dialogue Server (in a dialog). It is Dialogue Server who monitors the activity on each customer and decides to put a customer on hold in the queue or move her out of the queue.

A customer will always be moved out of the queue as soon as an answer is registered to the TM questionnaire. Other reason for being moved out of the queue is when the customer contacted exceeds the limit for call attempts. (Number set for the project can be seen on top op the screen Call attempts). Other reason for being moved out of the queue is when status code Blocked or Wrong Number is set.

Other codes can be used to move a customer out of the queue. Check with your system administrator to verify the functions for all codes in your TM-projects.



The picture shows how Dialogue Server controls the queue system in TM Web.

Call attempts

When a TM-project is created in Telemarketing, settings are made for

- **Call attempts** - Max number of times allowed to contact a customer in the project)
- **Time between calls** - (Min. number of minutes between each time you can try to call the same customer)

The settings valid for your TM-project is shown in

- Overview window for all available projects
- The info bar on top of the screen inside a project

Register a status code

If you start a call, but cannot reach the customer, follow these steps:

1. From the menu in the window Actions, click on **End call**.
2. A new window is open.
3. Choose **Call later**
4. Select date and time for when the customer should be called back. Decide who should contact the customer. If you wish to leave a message to the next person calling the customer, write in the comments box.
5. Click on **Post**.

If you start a call, but by some reason cannot reach the customer, follow the following steps:

1. From the menu in the window Actions, click on **End call**.
2. A new window is open.

3. Choose **Unsuccessful**
4. Select the appropriate status code for the call. If you wish to leave a message to the next person calling the customer, write in the comments box.
5. Click on **Post**.

The following codes are available in TM-WEB:

- Blocked Used if the customer does not want to be contacted by TM again. The customer is moved out of the TM queue.
- Wrong number Used if the customer phone number is wrong. The customer is moved out of the TM queue.
- Line Busy Used if the customers line is busy. The customer is put back in the queue.
- Wrong person Used if the wrong person answer the phone. The customer is put back in the queue.
- No answer Used if there is no answer on the line. The customer is put back in the queue.
- Line dead Used if the line is dead. The customer is moved out of the queue.
- Left message Used if the wrong person answer, and the operator leave a message to the customer. The customer is put back in the queue.
- Other Used if the customer cannot be reached due to other reasons. The customer is put back in the queue.

Note: The status codes as described above, are the default codes installed with TM-WEB. System administrator can remove or add new codes to suit the need at you organization. The list might differ from the one you will see when using the application.

Using keyboard and shortcut keys

TM-WEB is not using any shortcut keys.

You can still use the standard shortcut keys in windows when working in the application entering a new customer or editing fields. For example:

<Ctrl> <C> - copy the marked text

<Ctrl> <V> - past the text copied

<Ctrl> <X> - to delete marked text

Help function in the TM-WEB

To view the Help on your screen, click on the Help link on the Main menu.

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Reports and statistics

In this section:

Reports and statistics

TM Web is saving information in the Dialogue Database regarding all calls and call-attempts performed in each TM-project. This valuable information can be used in reports or statistics.

Report function in TM Web

If you have access to the report function in TM Web, Reports are visible in the menu under General. Click on Reports, and a page will show which TM-project you want to view a report on. After selecting a project, a report will be generated showing:

- how many customers are completed in the TM-project (Completed)
- how many calls are in process at the moment (In Process)
- how many customers are left to call (Left to call).

In addition you will see user statistics. The most important column is the number of calls completed per TM operator.

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Customizing TM Web

In this section:

Customizing TM Web

TM Web is a very flexible application. If there is something that does not suit the way you work, theres a good chance that it can be changed: Either by you, or by your system administrator.

Changes you can make: Language, Start page and Search behavior

All changes here will not affect other users, and will follow your log on other PCs. All changes can be edited at any time.

From the toolbar, you can choose **Project** > **User Setting** . The following changes are possible:

Program setting

- **Language.** Choose the language you want in TM-WEB.

  Note: Some fieldnames are defined in a global setting for your organization, and will not be affected by your change of language.

- **Start page.** Choose the start page for TM-WEB after log in.

Search setting

- **Use wildcard**. If this function is ticked off, the search function will automatic fill in "*" after a search is started (only for text fields). This will increase the possibilities to find the customer in a search, but the search might take longer time to complete.
- **Max number of rows**. Let you define how many customer records that will be displayed in the search result window after a search. Choose between 25, 50, 75 and 100 customer. Increased number of customer in the search window will affect the speed of the search.
- **Wrap text in grid**. Let long text or value in a field be shown in several rows in order to view the full content. Only affect the search result Window.

Changes the system administrator can do

Please note that the TM-WEB can be configured to suit your group or company by your system administrator or by a consultant. Advanced configuration possibilities include, but are not limited to:

- Set different fields visible for different groups.
- In most drop-down lists, change the names of values, add new values, or remove values.
- Change fieldname in all windows.
- Change text in headings for Windows and menu boxes.
- Change colors and look on the application.

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