

Training

Phone Widget



START



The generic training is based on explanations for basic operating procedures on TaskFlow. Users are encouraged to explore the functions of the system

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Click on a Step to View

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Website Live Chat Channels

CREATE

Click to define a new website live chat channel.

You can create channels for each website on which you want to install the website live chat widget, allowing you website visitors to talk in real time with your operators.

Each channel has it's own URL that you can send by email to your customers in order to start chatting with you.

-  Discuss
-  Calendar
-  Contacts
-  Sales
-  Call Centre
-  Campaigns
-  Loans
-  Faker
-  Bank Acc...
-  Credit Re...
-  Link Track...
-  Accounting
-  Project
-  Website L...
-  Apps
-  Settings

Any application can be opened to use the phone widget. Be sure to have an extension assigned




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 NEXT

Offline (9100)



SIMULATE INBOUND CALL

Campaign: None

#773	04/08	Charl Naude	✓
#772	04/08	Lead 1723	✓
#771	04/08	Lead 1722	✓

Dashboard

To do Today: 0 Meetings, Next 7 days: 9

7 Next Actions, 28

Hi there! Performance: 94 Activities Done, 78,140.03€ Won in Opportunities

YOUR PIPELINE

Direct Sales

PIPELINE

Pipeline Analysis
Activities Analysis

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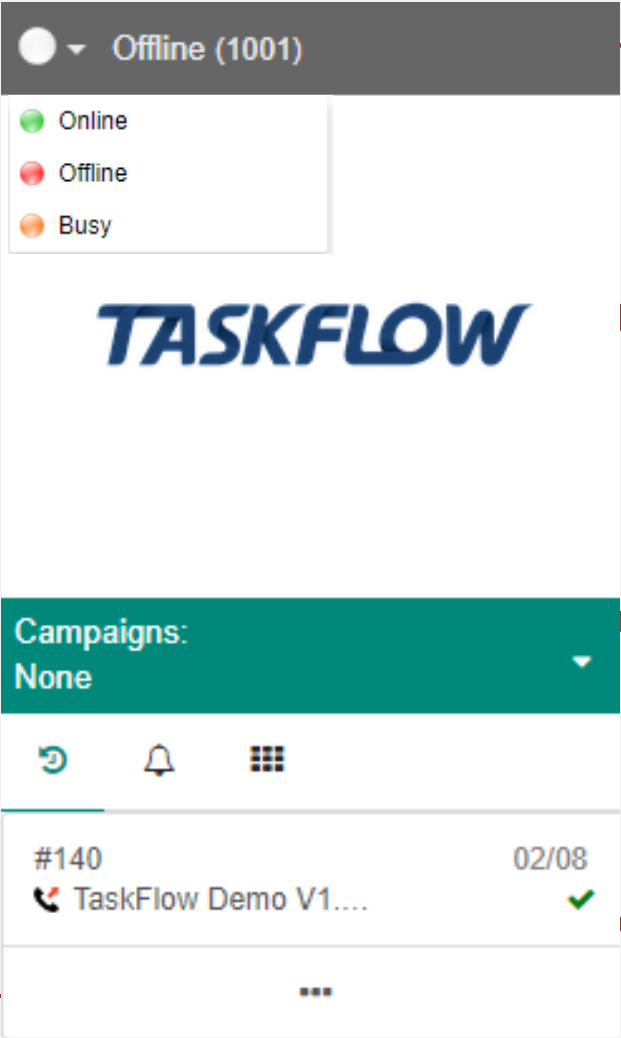
When a user on TaskFlow is created and assigned with an extension, they will be able to operate the phone widget

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The Phone Widget in TaskFlow serves as the work platform for call centre agents

Depending on the setup for the company, agents will be able to make inbound and outbound calls, followed by a process where an agent may need to complete details of a customer, decide on a phone call outcome or convert a lead to an opportunity.

This training documentation will cover the use of the phone widget in it's general capacity. Further training may be required if your company differs from the generic use



Three choices are available:
Online – Agent can make and receive calls
Offline – Agent unavailable
Busy – Agent is busy, can make calls

Agent Status with assigned extension

Menu Items
1. Logs: View Call Logs
2. Scheduled: View all calls dispositioned as rescheduled
3. Use the keypad to dial

When calls are in progress, this screen will be filled with actions that agents can use at their disposal

View more calls on your list

Agent can join and leave campaigns by using the drop-down arrow

4. Latest dialled numbers
5. Check mark ensures that the call has been dispositioned

Receiving Calls

The screenshot shows a mobile application interface. At the top, a dark green header displays 'Offline (9100)' with a left-pointing arrow. Below this is a white notification card for an 'Incoming Call' from '27102388600'. The card features a green 'ACCEPT' button and a red 'REJECT' button. Below the buttons is a dark green bar with 'Campaign: None' and two yellow starburst icons labeled '1' and '2'. Below this is a white bar with a refresh icon and a bell icon. The bottom section is a list of call history items, each with a number, name, date, and status.

Number	Name	Date	Status
#773	Charl Naude	04/08	✓
#772	Lead 1723	04/08	✓
#771	Lead 1722	04/08	✓

Until your version of TaskFlow is live, agents will not be able to make or receive call in offline mode

Indication of an incoming call

1. Answer the call and speak to the customer or lead
2. Decline the call

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Receiving Calls

Offline (6000)

In progress 00:08

Unknown
2710 7957

1 MUTE 2 HOLD 3 TRANSFER

END CALL

Outcome

Select type of call:

- 4 LOAN APPLICATION
- 5 CAMPAIGN CONTACT
- 6 LOAN
- 7 LEAD/OPPORTUNITY
- 8 PROJECT ISSUE
- 9 CUSTOMER/VENDOR

Campaigns:
None

No calls made

Call duration

1. Mute: Agent can mute his/her voice
2. Hold: Put client on hold
3. Transfer: Transfer to another extension or foreign number

4. Open or create a new customer loan application
5. Create or associate a contact on the system
6. Create a new Loan
7. Create or select an existing lead
8. Create a project issue
9. Create or associate a customer on the system

The above options will appear if TaskFlow does not recognise the incoming call as an existing contact/lead/customer

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Outgoing Calls

Offline (9100)



SIMULATE INBOUND CALL

Campaign: Test Campaign

START DIALLING **2** **3**

Ready for next item


#992	Lead 1718	13:10	✓
#991	test	13:07	✓
#773	Charl Naude	04/08	✓

Campaign: Test Campaign

Test Campaign 2922

LEAVE

Offline (9100)



SIMULATE INBOUND CALL

Campaign: Test Campaign

STOP DIALLING

Calling in 8 seconds...

#1026	Lead 1922	07:22	✓
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Before making calls, be sure to join a Campaign first

1. Click on "Start Dialling" to commence with outgoing calls
2. When done with a call, click "Next" to attempt the next call
3. Options for: "Open form view" and "Wrap-up time"

A countdown timer will start as soon as the agent begins dialling

Offline (9100)

In progress 00:05

Lead 2506 4
2782440713

MUTE HOLD TRANSFER

END CALL

Outcome 1
Interested

Additional notes... 2

SAVE 3

Campaign:
Test Campaign

STOP DIALLING 5 Busy...

#1026 07:22
Lead 1922

Interested 1

Interested

Voicemail

Call Back

Not Interested

Wrong Number

Outgoing Calls

1. During the call, the agent will have a drop-down menu available to select the outcome of the call
2. An agent can write additional notes that can go along with the call outcome
3. When the outcome is saved, the agent can move to the next call
4. When calling a client of a lead, a form will open that is related. The agent can open "Edit" view and change the details.
5. When the agent is done calling, click on the "Stop dialling" to seize call production

1 Calls

Lead 2506 4

Company Name		Title	
Address	4606 Gareth Street Lols Place Brits South Africa	Name	Nonkululeko
Campaign Batch	Test Batch 0003	Surname	Beck
Last Disposition		ID Number	6301174910089
Outcome		Job Position	
Outcome Date		Email	
Feedback		Primary No.	2782440713
Salesperson	Administrator	Rating	☆☆☆
Sales Team	Direct Sales	Tags	

INTERNAL NOTES EXTRA INFO

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