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

support@taskflow.co.za

TASK FLOW

INDEX

Click on a Step to View

Phone Widget

CREATE

Click to define a new website live chat channel.

You can create channels for each website on which you want to in
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 yo
customers in order to start chatting with you.

GR   FAVOR

Discuss

Calendar

Contacts

Sales

Call Centre

Campaigns

Loans

Faker

Bank Acc...

Credit Re...

Link Track...

Accounting

Project

Website L...

Apps

Settings

@ 20

Administrator (demo)

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

TASK▶FLOW

BACK ◀ **I N D E X** ▶ NEXT

Offline (9100)

TASK FLOW

SIMULATE INBOUND CALL

Campaign:
None

#773   04/08
📞 Charl Naude   ✓

#772   04/08
📞 Lead 1723   ✓

#771   04/08
📞 Lead 1722   ✓

...

Dashboard

1-1 / 1

To do
Today

Next 7 days

0
Meetings

9

7
Next Actions

28

☺ **Hi there!**
Great sales journeys start with a clean pipeline.
Create a few opportunities to activate your dashboard.

YOUR PIPELINE

Performance

94
Activities Done

100

0

78,140.03€
Won in Opportunities

Direct Sales   More ⌄

PIPELINE   Pipeline Analysis
                         Activities Analysis

2

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

1

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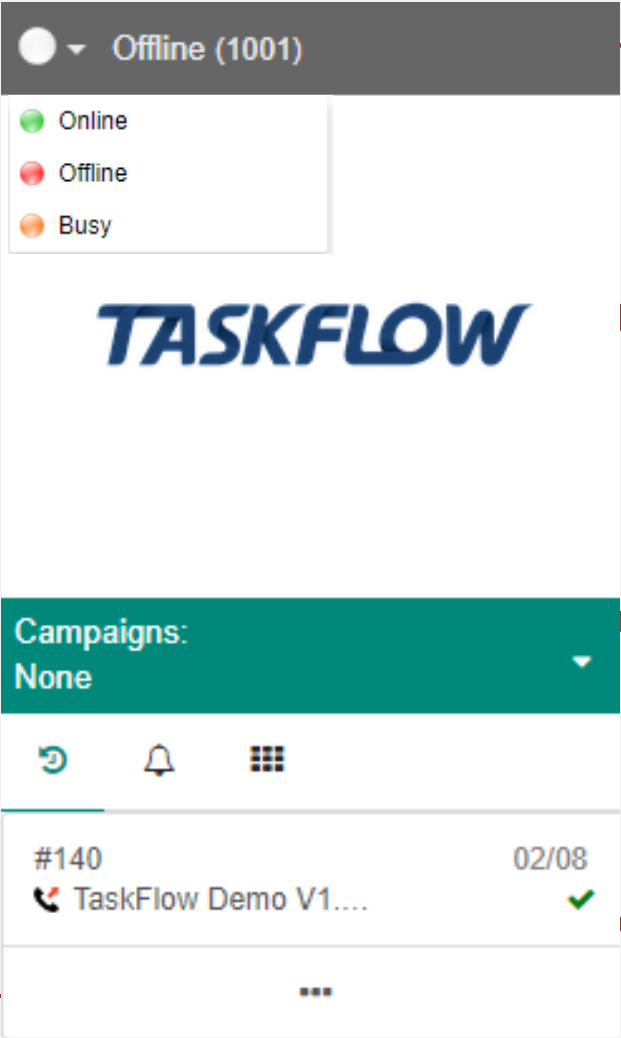
Three choices are available:
Online – Agent can make and receive calls
Offline – Agent unavailable
Busy – Agent is busy, can make calls

Agent Status with assigned extension

Offline (1001)

- Online
- Offline
- Busy

TASKFLOW

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

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

Campaigns:
None

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

#140   02/08
TaskFlow Demo V1....   ✓

View more calls on your list

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

Offline (9100)

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

Incoming Call
27102388600

Indication of an incoming call

ACCEPT (1)   **REJECT** (2)

Campaign:
None

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

#773   04/08
Charl Naude   ✓

#772   04/08
Lead 1723   ✓

#771   04/08
Lead 1722   ✓

...

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

Offline (9100)

TASK FLOW

SIMULATE INBOUND CALL

Campaign:
Test Campaign

Campaign:
Test Campaign

Test Campaign | 2922

LEAVE

START DIALLING ▎ ⚙

1 **2** **3**

Ready for next item

🕓 🔔

| #992 | 13:10 |
| 📞 Lead 1718 | ✔ |

| #991 | 13:07 |
| 📞 test | ✔ |

| #773 | 04/08 |
| 📞 Charl Naude | ✔ |

···

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"

Offline (9100)

TASK FLOW

SIMULATE INBOUND CALL

Campaign:
Test Campaign

STOP DIALLING ▎ ⚙

Calling in 8 seconds...

🕓 🔔

| #1026 | 07:22 |
| 📞 Lead 1922 | ✔ |

···

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

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