MMDIAL AGENT DESK

Manual for agents

Signing in, calling, documenting – the desk step by step

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1. About this manual

This manual is for everyone who **makes calls** with mmDial. It explains the agent desk: how you sign in, how a call runs, what the buttons do and what to do when something goes wrong.

You need no prior knowledge. If you have used a browser before, that is enough.

1.1 A note on the interface language

mmDial is available in **German, English, Spanish, French, Dutch and Turkish**. The language belongs to your account, so your colleague can work in a different one from you. If your screen is in the wrong language, ask your team leader – it is a setting, not a rebuild.

Many installations still run in German. For that reason, wherever a button, a status or a message is named below, the **original German wording** is given in brackets. Look for the German wording on your screen if the English one does not appear there.

1.2 Not everyone sees the same thing

Your screen may look different from what is described here. That is normal and not a fault. What you see and what you are allowed to do depends on:

- the **scope your company has booked**
- the **permissions** your team leader has given you
- the **campaign** you are currently working in

Manual dialling, transferring, conferences, parking, recording and break reasons are typical examples: sometimes they are available and sometimes they are not.

Sections affected by this are marked like so:

> **NOT VISIBLE IN EVERY ACCOUNT**
> This function is not present everywhere. If the button described is missing, it is not enabled for your campaign – that is deliberate, not a defect.

If something you need for your work is missing, ask your team leader. Whether it can be switched on is for them to decide together with us – some of it depends on the plan booked.

1.3 Who sets up what?

Who	Does what
You as the agent	Making calls, setting outcomes, filling in the form, arranging callbacks
Your team leader / administration	Campaigns, lists, permissions, break reasons, recording

You get your login details from your team leader, not from us.

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2. Signing in

2.1 What you need

- a **current browser** (Chrome, Edge, Firefox or Safari)
- your **user name** and **password**
- a **headset**

You no longer need a telephone program of your own: the phone is in the browser. Only if your organisation deliberately stays with a **softphone** or a **desk phone** does that come on top.

2.2 The built-in phone

On the sign-in page, below the campaign selection, there is a tick box **Use integrated VoIP connection** (*Integrierte VoIP-Verbindung verwenden?*). Tick it before you sign in and allow the browser access to your microphone. There is nothing else to do.

Beside it you can set whether the browser should handle **volume and echo** itself. The default is off; switch it on if the person you are speaking to hears you too loud one moment and too quiet the next.

> **NOTE**
>
> If you do not see the tick box but a message that your browser does not support access to the microphone, it is almost always one of two things: you are not signed in over **https**, or the browser is too old. The message names the reason.

2.3 How to sign in

1. Go to the address your team leader has given you
2. Enter your **user name** and **password**
3. Select the **campaign** you are to work in
4. Sign in

After that you are in the **Ready** state (German: *Bereit*) – or in a break, depending on how your campaign is set up.

> **TIP**
>
> Always sign out properly when you finish for the day. An account that is still signed in may block a seat for your colleagues.

2.4 If signing in does not work

Message	What to do
Wrong password	Check upper and lower case. If it persists: ask your team leader
No campaign can be selected	You have not been assigned to a campaign yet
Sign-in required (*Anmeldung erforderlich*) after signing in	Your session has expired. Sign in again
You are signed out again immediately	You may still be signed in on another PC

3. The screen at a glance

The desk consists of a few areas. You do not need any further windows.

Area	What is there
Header	Your user name, the campaign, your current state and the sign-out button
Customer data	Name, address, phone number, alternative number, comment, last call
Buttons	Everything you need during the call
Outcome list	The possible call results
Order form	If your campaign has one
Callback list	The follow-ups you have arranged

If a **recording** is running, that is displayed clearly and visibly.

3.1 Coloured notices

Some campaigns colour the customer area and display a short guide – for particular groups of records, for instance. Read that notice before you go into the call; it is not there without reason.

4. Setting up the sound

Before you take your first call, check the sound once.

4.1 Choosing the microphone and playback

Under **Sound settings** (*Toneinstellungen*) you choose:

- the **microphone** – usually your headset
- the **playback** – the headset as well, not the PC speakers

With the built-in phone, the browser asks the first time whether it may access the microphone. If you refuse, you will hear but not be heard – and the permission can only be taken back in the browser's settings, not in mmDial.

If only *Default device* can be selected, your operating system determines the devices. In that case, change them there.

4.2 Muting

Mute (*Stumm*) switches your microphone off, **Unmute** (*Stumm aufheben*) switches it back on. Muting takes effect as soon as a call is connected.

> **CAUTION**
>
> Muting is not a substitute for a break. Somebody who is muted still gets calls assigned to them.

4.3 If you cannot hear or cannot be heard

1. Is the headset plug seated properly?
2. Is the right device chosen under *Sound settings*?
3. Is the volume turned up on the headset and in the operating system?
4. Is the microphone muted?
5. If nothing helps: reload the page and sign in again

5. Your states

mmDial always keeps you in exactly one state. Your team leader can see it in the live view.

State	What it means
Ready (*Bereit*)	You are waiting for the next call. The dialler can put a call through to you at any moment
On a call (*Im Gespräch*)	A connection is established
Wrap-up (*Nachbearbeitung*)	The call has ended, you are still documenting
On a break (*In Pause*)	You do not receive calls

The change usually happens by itself: as soon as you have set the outcome and – if necessary – saved the form, you go back to *Ready*.

> **TIP**
>
> Do not stay in *Wrap-up* longer than you need to. That time goes into the reporting and is missing from your team elsewhere. If you need longer, it is better to go into a break deliberately.

6. Making a call

6.1 The usual sequence

1. You are in **Ready**
2. The dialler puts a call through – the customer data appears
3. You have the conversation
4. You **end** it with *Hang up / End* (*Auflegen / Beenden*), or the customer hangs up
5. You **set the outcome**
6. If there is one: you fill in the **order form** and save
7. You are back in *Ready*

6.2 The most important buttons

Button	What it does
Next customer (*Nächster Kunde*)	Fetches the next record and dials it
Next customer (preview) (*Nächster Kunde (Vorschau)*)	Shows the next record first; you decide whether to dial
Take call (*Anruf holen*)	Fetches a waiting call from the queue
Hang up / End (*Auflegen / Beenden*)	Ends the current call
Call lead (*Lead Anrufen*)	Dials the record currently open (again)
Close lead (*Lead Schliessen*)	Closes the record without dialling
Assign outcome (*Status zuweisen*)	Opens the outcome selection
Start / stop recording (*Aufnahme starten / stoppen*)	Controls the call recording
Break (*Pause*)	Signs you out of the call distribution
Sign out (*Abmelden*)	Ends your session

6.3 If the customer hangs up before you do

You see the message *The customer has hung up* (*Kunde hat aufgelegt*). The call is over – set the outcome anyway, otherwise the record stays unworked.

6.4 If somebody else was quicker

When fetching a waiting call, the message *Another agent has already taken this call* (*Ein anderer Agent hat diesen Anruf bereits geholt*) can appear. That is not a fault – just take the next one.

7. Setting the outcome

The outcome is the result of your call. It decides what happens to the record: whether it is dialled again, whether a callback arises, whether it counts as a success.

7.1 Common outcomes

Code	What it means
`A`	Reached
`AA`	Answering machine
`B`	Busy
`N`	Not reached
`NA`	Number unobtainable
`CALLBK`	Callback arranged
`SALE`	Success / sale

In addition, your campaign usually has outcomes of its own, for instance *Not interested*, *Wrong target group* or *Wants information sent*.

7.2 Hotkeys

In some campaigns keyboard shortcuts are set up. Then you set the outcome with a keypress instead of the mouse. Which key sets which outcome can be seen in the outcome list.

> **CAUTION**
>
> Set the outcome **honestly**. A "not reached" wrongly set on a call that did take place distorts the reporting and leads to the same person being called again.

7.3 If the outcome is not saved

If *The outcome could not be saved* (*Der Status konnte nicht gespeichert werden*) appears, try again. If it persists, reload the page and report it to your team leader – otherwise the record could be left unworked.

8. The order form

If your campaign is to capture more than an outcome, you get an **order form** – the screen next to the customer data.

8.1 Filling it in and saving

1. Fill in the fields. Mandatory fields are marked
2. **Save**
3. Only then set the outcome

If *Order form not filled in* (*Auftragsformular nicht ausgefüllt*) appears, a mandatory entry is missing. Particular outcomes – usually the success outcome – can only be set when the form is complete.

8.2 Multi-page forms

Extensive screens have several pages. Page through them and save once at the end – not on each page individually.

8.3 Documents

If your campaign has document sending, you can send material straight from the call. The **Documents** area shows what is available.

If it says *Documents locked* (*Dokumente gesperrt*), the record has already been passed on by outcome forwarding – then sending from here is no longer possible.

9. Callbacks and follow-ups

9.1 Arranging a callback

If somebody would like to be called back later:

1. Set the outcome for callbacks (usually `CALLBK`)
2. Enter the **date and time**
3. Optionally leave a **comment** – your future self will thank you
4. Save

9.2 Your callback list

Under **Callback list** (*Rückrufliste*) you will find the follow-ups you have arranged. From there you make the call at the agreed time.

- **Personal callbacks** are assigned to you
- **Global callbacks** can be taken over by anybody in the team

Your team leader can move callbacks or convert them between personal and global.

> **TIP**
>
> Write in the comment what it was about and what was agreed. "Will call back" helps nobody – "Wants a quote for 3 seats, available from 2 p.m." does.

10. Dialling manually

> **NOT VISIBLE IN EVERY ACCOUNT**
> Manual dialling is not permitted in every campaign.

If your campaign permits manual dialling, you can enter a phone number yourself and call it, without the dialler giving you a record.

1. Open **Manual call** (*Manueller Anruf*)
2. Enter the number
3. Call

Manual calls are documented too and show up in the reporting.

10.1 Alternative number

If a second number is stored in the record, you can dial it using **Alternative** (*Alternativ*) when the main number cannot be reached.

11. Transferring, conference, parking

> **NOT VISIBLE IN EVERY ACCOUNT**
>
> These three functions are enabled individually. So it may be that you are allowed to transfer but not to park – or the other way round.

11.1 Transfer

Transfer passes a call on to somewhere else – to an extension, an external number or a colleague. After the transfer you are out of the call.

11.2 Conference

Conference call (*Konferenzanruf*) brings a third person in.

> **NOTE**
>
> Only conferences with **three** participants are possible. The system does not allow more.

11.3 Parking

If *Parking* (*Parken*) is enabled, you put a call aside briefly and bring it back with **Retrieve** (*Holen*). The other party hears the on-hold music in the meantime.

11.4 Tone dialling (DTMF)

DTMF / tone dialling (*DTMF / Tonwahl*) sends digits into the running call – necessary when you end up in a voice menu at the other end.

12. Recording

> **NOT VISIBLE IN EVERY ACCOUNT**
>
> Recording is not available in every account. If you see no button for it and no running recording is displayed to you either, no recording takes place in your campaign.

Whether and how recording happens is set by your team leader for each campaign.

- **Permanently** – every call is recorded, you do not have to do anything
- **Controlled by you** – you start with **Start recording** (*Aufnahme starten*) and end with **Stop recording** (*Aufnahme stoppen*)

If a recording is running, that is displayed clearly to you.

> **CAUTION**
>
> Tell the person you are speaking to about the recording and obtain their consent before you start – in the way your team leader specifies. Without consent, recording is not permitted.

13. When somebody does not want to be called again

If a person you have called objects to further contact, their number belongs on the **blocklist**. Set the outcome your campaign provides for that – the record will then no longer be dialled.

> **CAUTION**
>
> Take that seriously and do not put it off. An objection that is not recorded leads to another call – and that can become expensive.

14. Taking a break

1. Click **Break** (*Pause*)
2. If asked: choose the **break reason** – break reasons are set up per campaign, so it may be that you are not asked at all – for example short break, lunch or training
3. You no longer receive calls
4. You end the break using the same button

For some break reasons a time limit is set. Your team leader can see in the reporting how much time went to which reason.

> **NOTE**
>
> You finish a call that is currently running – the break only begins afterwards.

15. Signing out

At the end of your shift, click **Sign out** (*Abmelden*). Do not simply close the window: otherwise your session stays alive for a while and occupies a seat.

If the system says *You are being signed in again by an admin* (*Sie werden neu eingeloggt von einem Admin*), your team leader has stepped in – confirm and sign in again.

16. When something does not work

16.1 The most common messages

Message	What it means	What you do
No lead open (*Kein Lead offen*)	No record is currently loaded	Click *Next customer*
List empty (*Liste leer*)	The campaign has no dialable records left	Inform your team leader
No call active (*Kein Gespräch aktiv*)	You used a call function without being on a call	Nothing further
Another agent has already taken this call	Somebody was quicker	Fetch the next call
Order form not filled in	A mandatory field is missing	Complete the form
The call could not be set up (*Der Anruf konnte nicht aufgebaut werden*)	A technical problem setting up the connection	Try again; if it persists: report it
Not on a break (*Nicht in Pause*)	You wanted to end the break but were not on one	Nothing further
Campaign changed (*Kampagne gewechselt*)	Your team leader has moved you	Carry on working
Admin has hung up (*Admin hat aufgelegt*)	Your team leader ended the call	Set the outcome
There is currently no voice connection (*Zurzeit besteht keine Sprachverbindung*)	The telephony connection is missing	Click *Reconnect*
You are not assigned to a workstation (*Ihnen ist kein Arbeitsplatz zugeordnet*)	Your organisation works with fixed desk binding and your assignment is missing	Report it to your team leader at once
A button from this manual is missing	It is not enabled for your campaign	Ask your team leader whether you need it

16.2 Re-establishing the connection

If the voice connection drops, mmDial tries to repair it automatically; you then see *Connection is being re-established* (*Verbindung wird neu aufgebaut*). If that does not help, click **Reconnect** (*Neu Verbinden*).

16.3 Reloading the page

If the interface looks unusual or buttons do not react, reload the page (`F5`). Your sign-in is kept.

16.4 What your team leader wants to know

When you report a problem, these details help:

- your **user name** and the **campaign**
- the exact **time**
- the **exact wording of the message**
- what you did immediately beforehand

Under **Session** (*Sitzung*) you will find technical details – server time, system time, time zone, script version and whether there have been errors since loading. Those details help support.

> **TIP**
>
> If the **workstation clock deviation** differs noticeably from zero, your PC's clock is wrong. That can lead to odd times in callbacks – please report it.

---

17. Appendix

17.1 Quick reference

If you want to …	then …
call the next customer	*Next customer*
look at the record first	*Next customer (preview)*
end a call	*Hang up / End*
record the result	*Assign outcome*
arrange a callback	Callback outcome + date and time
step away briefly	*Break* with a suitable reason
dial a number yourself	*Manual call*
bring somebody in	*Conference call* (max. three participants)
pass a call on	*Transfer*
record	*Start recording* – after notice and consent
finish for the day	*Sign out*

17.2 Ten rules for clean data

1. Always set an outcome – even when nobody answered
2. Set the outcome that really applies
3. Create callbacks with a date, a time **and** a comment
4. Record objections immediately, not later
5. Fill in the order form completely before you set the success outcome
6. Do not stay in wrap-up longer than necessary
7. Use the break function for breaks, not the mute button
8. Give notice of the recording before you start it
9. Report technical problems early instead of experimenting for a long time
10. Sign out properly at the end of the shift

17.3 Terms

Term	What it means
Lead / record	The customer you currently have in front of you
Campaign	The project you are working in
Outcome / status	The result of a call
Follow-up / callback	An arranged return call
Screen / GUI	The order form
Blocklist / DNC	Numbers that must no longer be called
Softphone	A telephone program on your PC. With the built-in phone you do not need one
Built-in phone	The voice connection inside the browser itself, with no extra program
Wrap-up	The time after the call in which you document it

17.4 If your campaign takes incoming calls

If your team also takes **incoming calls**, little changes for you: a call can come in at any time, for known callers the customer data is there immediately, and using *Take call* you pick up a waiting call from the queue. Everything else – outcome, form, follow-up, break – works unchanged.

A fuller description is in the *Supplement – Inbound*.

17.5 If you are assigned to a workstation

In some older setups the telephony is tied to the workstation instead of to your login. Then after signing in you see **which workstation you are assigned to**. If a warning appears instead saying that you are not assigned to a workstation, you cannot make calls – in that case please report it to your team leader at once rather than carrying on trying.

> **DEPRECATED – BEING RETIRED**
>
> This kind of setup is deprecated and is being retired. In most organisations it does not exist at all – there, the reference to a workstation is simply not present.

17.6 Further documents

For your team leader:

- *mmDial Pro manual*

- *mmDial Basic manual*
- *Supplement – Inbound*
- *Supplement – Workstations*

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