

Reassigning an Agent through the Call Module

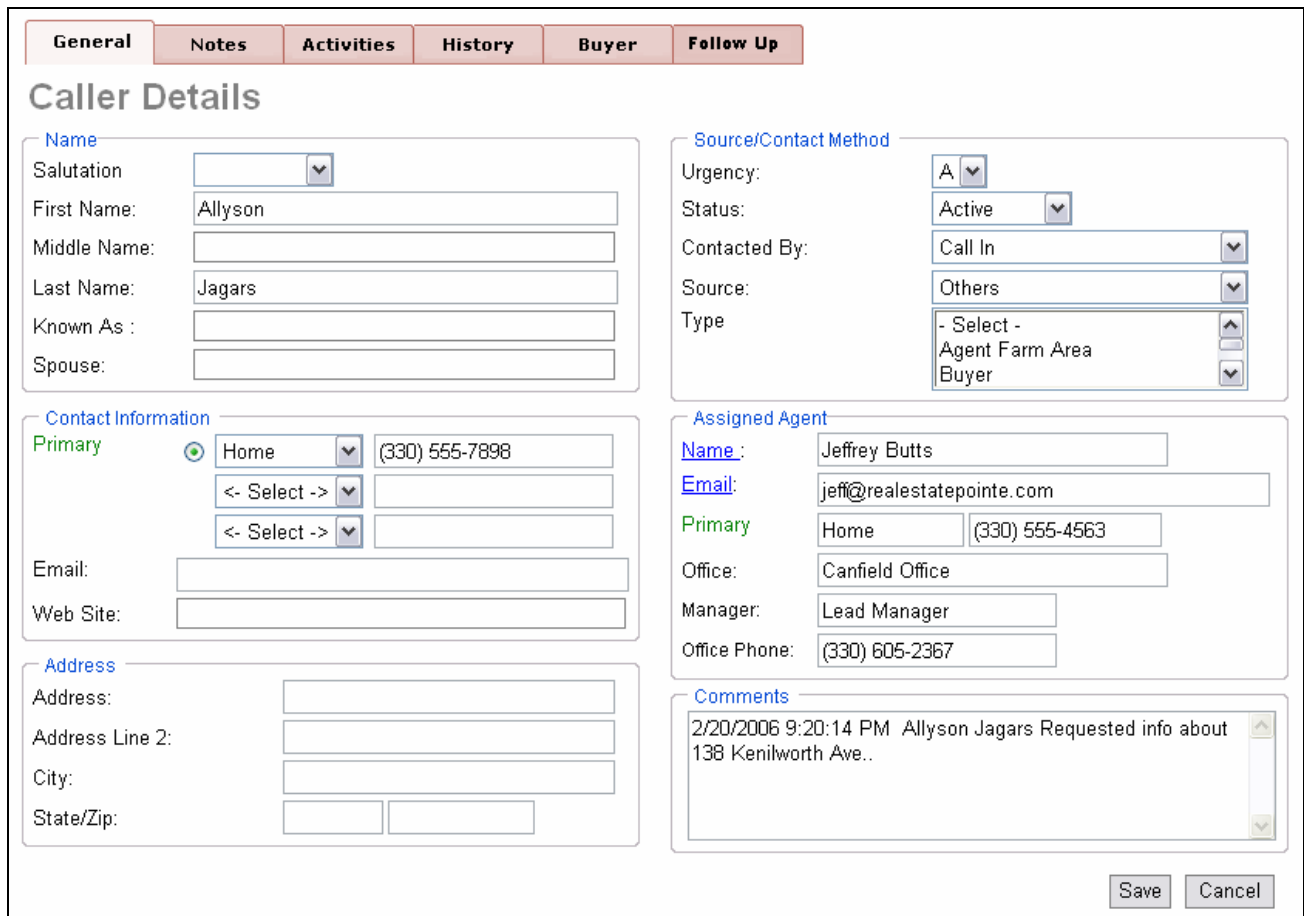
At times the call center employee will find it necessary to perform an agent reassignment in the ShowingPointe application in order to provide the quality of service the customer seeks. Usually this happens when the currently assigned agent fails to call in to the call center to receive the new lead information. The following process is one of several ways to accomplish an agent reassignment in the smoothest workflow scenario.

❶ From the call center dashboard the activity failed due to the current assigned agent's inability to accept the new lead information in the given time frame and the call center employee is notified by the activity changing to the color of red. Click on the Primary Party (customer) name located as shown below.



Channel	Date/Time	Type	Subject	Primary Party
<input type="checkbox"/> Call In	2/20/2006 11:18 AM	Call	Agent Call In for Lead	Allyson Jagars

This will take you to the “general” tab of the contact record for the selected customer.



General | Notes | Activities | History | Buyer | Follow Up

Caller Details

Name

Salutation:

First Name: Allyson

Middle Name:

Last Name: Jagars

Known As:

Spouse:

Source/Contact Method

Urgency: A

Status: Active

Contacted By: Call In

Source: Others

Type: - Select -
Agent Farm Area
Buyer

Contact Information

Primary: Home (330) 555-7898

<- Select ->

<- Select ->

Email:

Web Site:

Address

Address:

Address Line 2:

City:

State/Zip:

Assigned Agent

Name: Jeffrey Butts

Email: jeff@realestatepointe.com

Primary: Home (330) 555-4563

Office: Canfield Office

Manager: Lead Manager

Office Phone: (330) 605-2367

Comments

2/20/2006 9:20:14 PM Allyson Jagars Requested info about 138 Kenilworth Ave..

Save Cancel

- 2 Find the Assigned Agent section and click on the Name link.

Assigned Agent

[Name:](#) Jeffrey Butts

[Email:](#) jeff@realestatepointe.com

Primary: Home (330) 555-4563

Office: Canfield Office

Manager: Lead Manager

Office Phone: (330) 605-2367

- 3 Clicking on the Name link opens the Advanced Agent Search window where you can begin entering the information and searching for the next assigned agent. Once you find the correct agent select the radio button next to their name to bring the information back to the contact record.

Advanced Agent Search

Contact Type: In-house Agent

First Name: beth Contains

Last Name: Contains

Office: - Select -

Name	PrimaryPhone	City	Address	Em
<input type="radio"/> Beth McCallister	(330) 729-3557			beth

- 4 Once the new agent information appears in the contact record be sure to click the Save button at the bottom right hand corner of the screen. This assigns the new agent to the customer but that will leave a few more steps before you're done.

- 5 If you would return to the call dashboard you would see that the activity is still waiting and still overdue so in order to finish completing the activity from where you are in the contact record (general tab) select the "follow up" tab at the top.

General Notes Activities History Buyer **Follow Up**

Caller Details

This takes you to the follow up area of the contact record and pulls up the current activity information.

The screenshot shows a web interface for managing contact records. It is divided into three main sections: 'Activity Details', 'Notes', and 'Contact'.
- **Activity Details:** This section contains several input fields: 'Status' is set to 'Complete' with a dropdown arrow and a 'Priority' checkbox; 'Date' is '2/20/2006' with a calendar icon; 'From' is '11:13 AM' with dropdowns for hours, minutes, and AM/PM, and a clock icon; 'To' is '11:18 AM' with similar dropdowns and a clock icon; 'Type' is 'Call' with a dropdown arrow; 'Subject' is 'Agent Call In for Lead'; and 'Place' is 'Front Desk'.
- **Notes:** A large, empty text area for adding notes.
- **Contact:** This section is split into two parts: 'Contact' for 'Allyson Jagars' with home phone '(330) 555-7898'; and 'Assigned Agent' for 'Jeffrey Butts' with address '2357 Somewhere Ave., NE Warren, OH 44483', home phone '(330) 394-1724', cell phone '(330) 219-1628', and email 'jeff@realestatepointe.com'.
At the bottom, there are four buttons: 'Save and Dash', 'Save and Add', 'Save and View', and 'Save Notes'. An arrow points from the 'Save and Add' button towards the 'Notes' field.

6 Type in the notes field that the activity failed due to no contact from the agent and click the **Save and Add** button to not only complete this activity but to create a new one for the newly assigned Agent to Call in.

7 In the New Activity Screen make any necessary date and time changes that will need to be input for the new activity. Be sure to allow for the predetermined time frame that an agent is allowed to have before losing the lead to another available agent.

The 'New Activity' form is a web interface for creating a new activity record. It includes the following fields:
- **Date:** '2/20/2006' with a calendar icon.
- **Status:** 'Active' with a dropdown arrow.
- **From:** '3:07 PM' with dropdowns for hours, minutes, and PM, and a clock icon.
- **To:** '3:12 PM' with dropdowns for hours, minutes, and PM, and a clock icon.
- **Primary Party:** 'Allyson Jagars'.
- **Flag:** 'Gray' with a dropdown arrow and a flag icon.
- **Type:** 'Follow Up' with a dropdown arrow.
- **Urgent:** An unchecked checkbox.
- **Subject:** An empty text field.
- **Place:** An empty text field.
- **Description:** A large text area for a detailed description.
At the bottom, there are three buttons: 'Save and Dash', 'Save and Add', and 'Save and View'.

⑧ Select the Type as Call to have the activity alert enter into the Urgent Lead Related Activities or Follow Up to have it appear in the lower call dashboard area. (Should be set to “Call” for all call centers). Then select the correct subject or create the appropriate subject if not available by selecting the Subject link. Type any notes that maybe important to other workers or managers.

⑨ The final step is to Click Save and Dash to return to the Call Dashboard and contact the new agent if you haven’t already done so.