NOETICA
ACTIVE X CONTROLS

Standard Active X Controls

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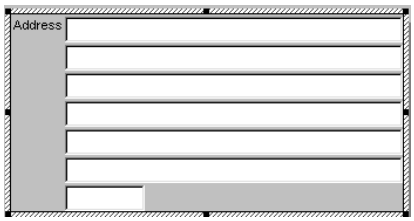
NOETICA ACTIVE X CONTROLS

ADDRESS

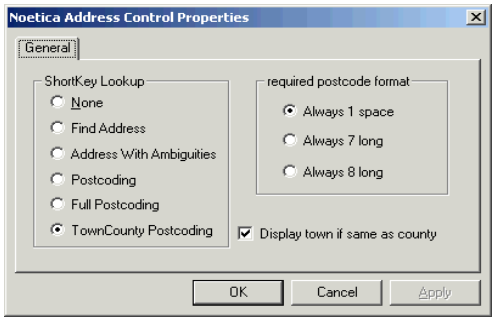
The *Noetica Address* control allows the capture of a postal address (including postcode). Address details can be entered manually, or if additional addressing software is used, address fields can be entered automatically, based on the entry of a postcode.

Appearance 



Property Page

Right click on the control and open the *Properties* dialog, where you configure the type of address facilities that you wish to use.



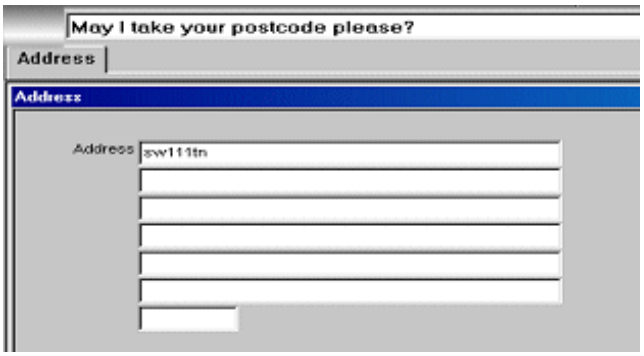
Depending on the addressing software used, the following properties are available:

None	The full address has to be entered manually.
Find Address	Entering the postcode will display the rest of the address when *Enter* is pressed. The House/flat number needs to be put in manually.
Address with Ambiguities	Adding the postcode will display the rest of the address when *Enter* is pressed. Details such as house number or company name can be selected from a window displayed.
Postcoding	Entering the postcode will display the address, typing the address will display the postcode on pressing *Enter*. Select house number manually.
Full Postcoding	Adding the postcode will display the address, typing the address will display the postcode on pressing *Enter*. Various details, such as house number /name can be selected from a window displayed.
Town County Postcoding	Displays the town and county in line 5 & 6 respectively. If 'display town if same as county' is ticked both the town & county name will be displayed, even if they are the same.

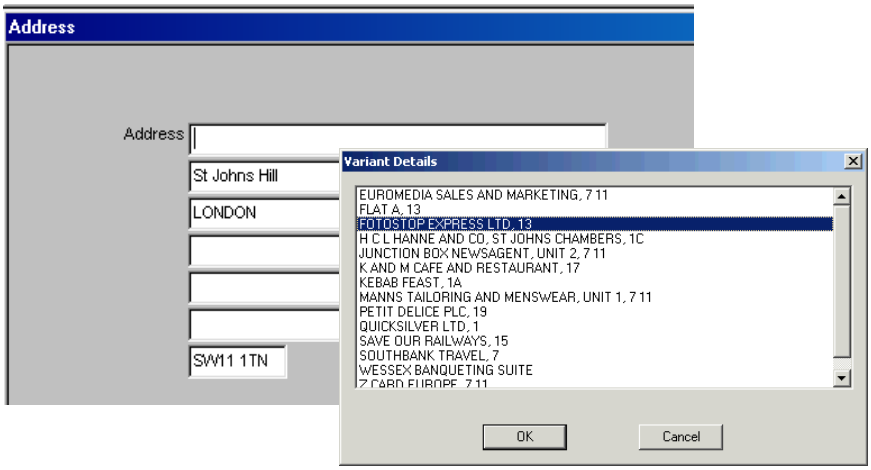
General Use when Taking Calls

When taking calls, the cursor is placed on the first line of the address control. The next action depends on the configuration of the control:

- If no addressing software is used, enter the caller's full address into the address fields displayed.
- If addressing software is used, enter the caller's postcode into the first line of the address control.



- On pressing **Enter** the caller's address will be displayed.
- If the *Variant Details* dialog opens, select the additional details, which can include company name or apartment number. They will then be placed into the first line of the address control.
- If the *Variant Details* dialog does not open, ask the caller for the additional details required to complete the address and enter them manually.



- To quickly clear an address so that you can add a new address, press the **F2** Function key at the top of your keyboard.

APPLICATION LAUNCHER

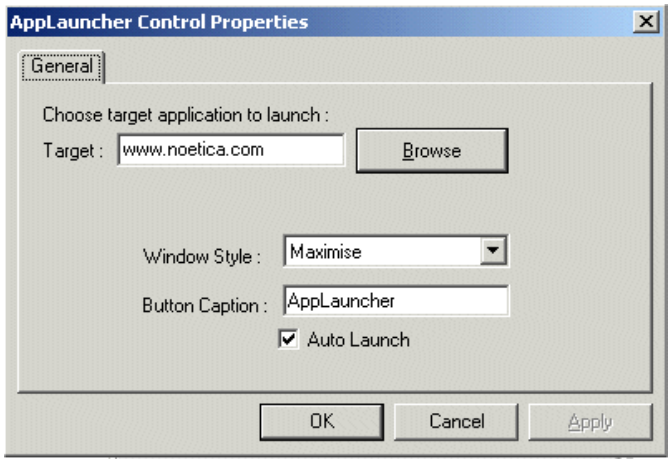
The *Noetica Application Launcher* allows users to launch websites or target applications at strategic points in the callflow when talking calls.

Appearance 

Properties

Right click on the control and open the *Properties* dialog, from where you locate the target application using the *Browse* button.

Enter the full path, including machine name and drive of the application to be launched, i.e.*\\Martini \E\Planning\ExpensesClaim, or* the path of a website, i.e. www.noetica.com .



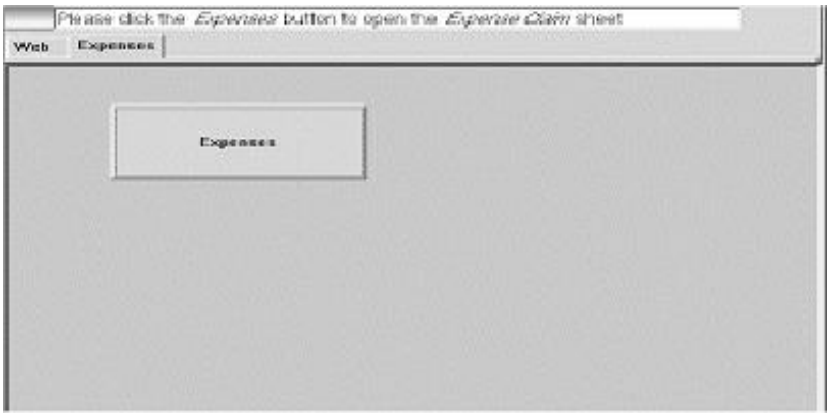
Choose target application to launch	Click the **Browse** button to locate the full path (including machine name and drive) of the file you wish to open.
Target	The path of the selected application will be displayed in the *Target* field.
Window Style	Select the window size for opening the target application.
Button Caption	Enter a name for the *Application Launcher* button. In our example '*Expenses'.*
Auto Launch	To automatically launch the application or website on reaching the control when taking calls.

General Use when Taking Calls

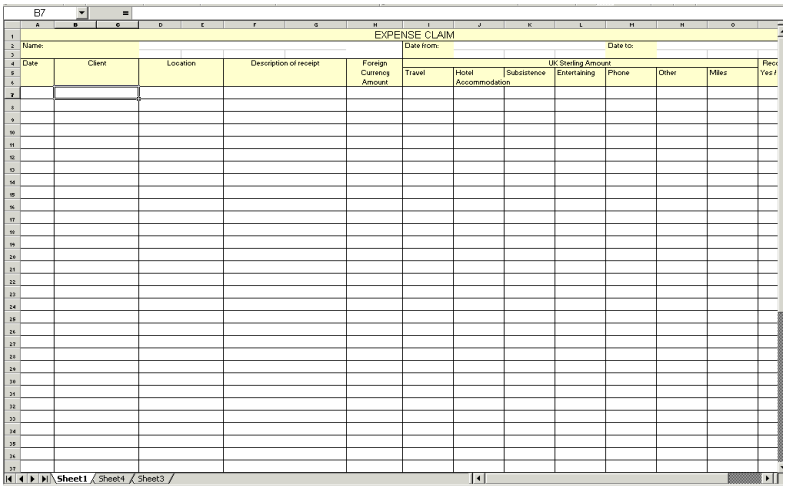
The website or target application

- can be set to launch automatically on reaching the control
- agents can click the button of the *Application Launcher.*

The name of the button will reflect the type of application that is about to be launched, in our example, an *Expense claim* sheet.



- In the target application you can view existing details and you can add new entries or make changes, as required.
- When exiting the target application, you will return to the Synthesys callflow.

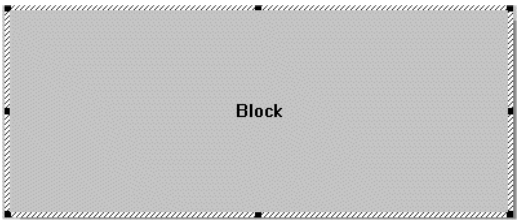


Enter or *Ctrl and Enter* will move you to the next section in the callflow.

BLOCKING

The *Noetica Blocking* control is an invisible control that can be used in conjunction with calculations to stop agents advancing in a callflow, if the calculation requires it. An appropriate error message is entered and displayed to the agents.

Appearance



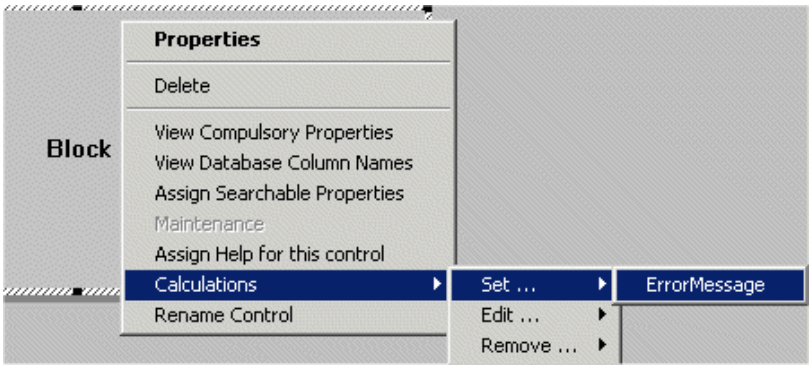
Pre-requisites

Due to the way Synthesys works, the *Blocking* control needs to be set up according to the following guidelines:

- The *Blocking* control should be the first control in the next section, following the section containing the control on which the calculation is based.
- The section containing the *Blocking* control needs to contain another control after it.
- The *ErrorMessage* property should never be an empty string, as these properties are not re-evaluated when switching sections in Take Calls.

Setting a Calculation

Right click on the control and select ***Calculation – Set - ErrorMessage.***

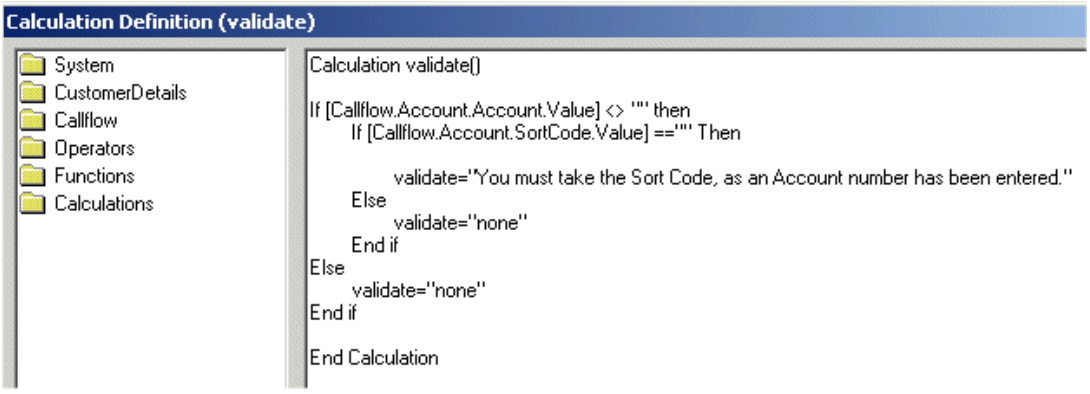


In our example, the calculation in our example specifies that:

If account details have been entered, agents must enter the Sort Code as well, otherwise they can't move to the next section. However, if no account number has been taken, the Sort Code field can be empty.

- If the property ***ErrorMessage*** is set to "none" (this is case sensitive) in the calculation, the control will automatically post a *Ctrl-Enter* when taking calls, so that it will skip through itself.
- If the property is set to anything else, the *Blocking* control will display a message and prevent agents from advancing any further in the Callflow.

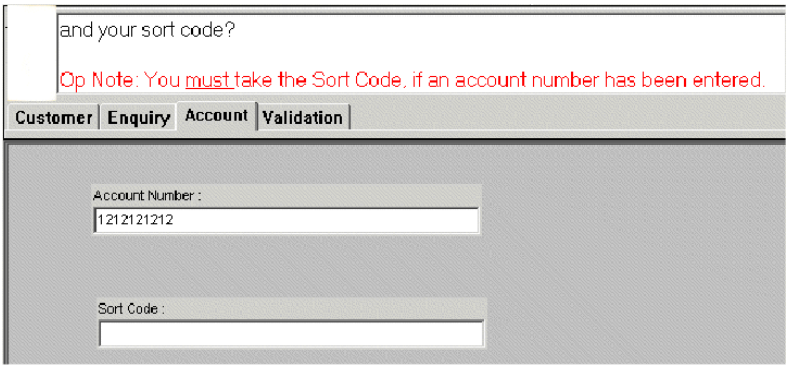
"You must take the Sort Code, as an Account number has been entered."



Other calculation used in conjunction with the Blocking control could, for example, prevent agents from entering any undesired characters, such as unwanted spaces, dashes or apostrophes.

General Use in Take Calls

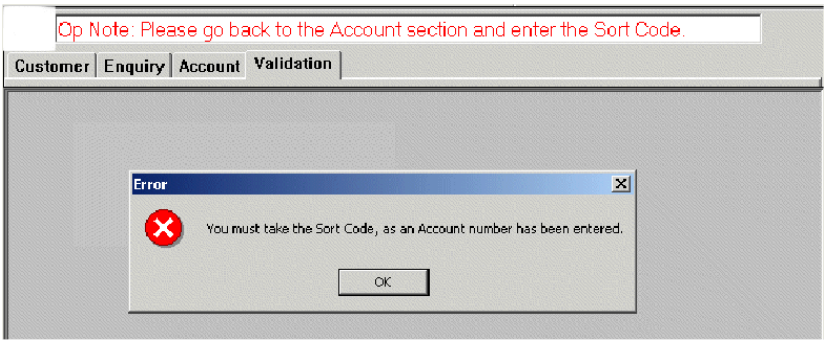
In our example, the *Noetica Blocking* control has been configured to ensure that agents enter the *Sort Code*, if account details have been entered.



Agents that ignore the prompt and try to move to the next screen without entering the Sort Code will go through the *Blocking* control, which will stop the agent from moving any further, until the *Sort Code* is entered.

An error message to this effect will be displayed:

"You must take the Sort Code, as an Account number has been entered."

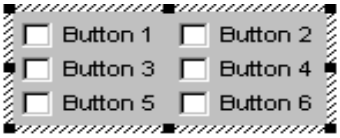


When the Sort Code is entered, agents will press *Enter* on their keyboard to skip the *Blocking* control and to move straight to the next section in the callflow.

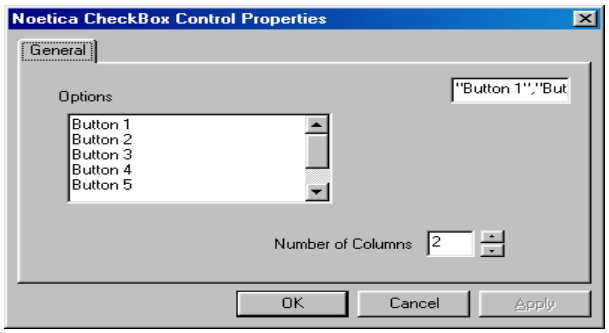
CHECK BOX

The *Noetica Check box* control displays a group of Windows style check boxes. Up to 20 boxes can be created and the control allows multiple selections of options.

Appearance



Right click on the control and open the *Properties* dialog, to enter text for up to 20 boxes. The appearance of the control can be change, selecting the number of columns displayed, up to a maximum of 5 columns.



To enter your own text:

- Move your cursor into the *Options* window.
- Replace the existing options, i.e. Button 1…etc. with your own options, as required, pressing *Enter* on the keyboard to move down to the next line.
- Next, select the number of columns and the click 'Apply' and 'OK'.

Next, configure the appearance of the control, selecting the number of columns to be displayed and click 'OK'.

In our example, one control is set to display 1 column, the other displays 3 columns.

General Use when Taking Calls

The Check box control is designed to allow the selection of any number of choices from the options available.

The boxes can be selected and deselected using the mouse or the keyboard.

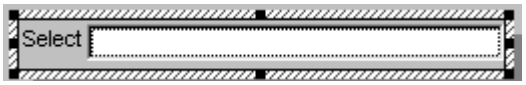
- If you use your mouse, click the left mouse button into a box, to make a selection.
- If you want to use your keyboard, use the arrow keys to move between the available options and make the selection using the space bar.

A black tick will show the options that have been selected, in our example 'Visa, Mastercard, Store Cards and Dinners Club.

COMBO LIST

The *Noetica Combo List* control displays a Windows style drop down list. The list of available items will be referenced from the database.

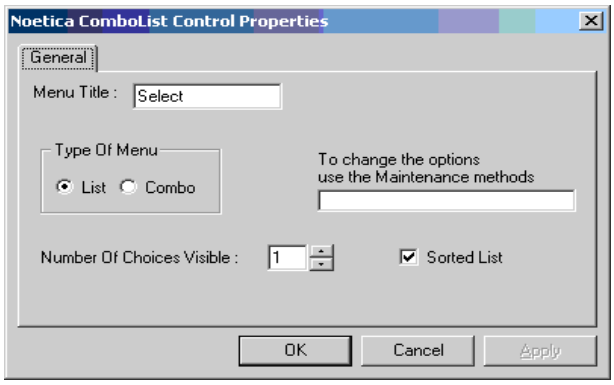
Appearance



Properties

Right click on the control and open the *Properties* dialog:

- Enter a caption into the *Menu Title* field.
- In the *Type of Menu* select the ***List*** or ***Combo*** button to display the control as a normal list or as a combo list to the agents, when taking calls.
- Place a tick in the *Sorted List* box to display the choices entered in alphabetical order.
- In *Number of Choices Visible* specify the number of items to be displayed at any one time.

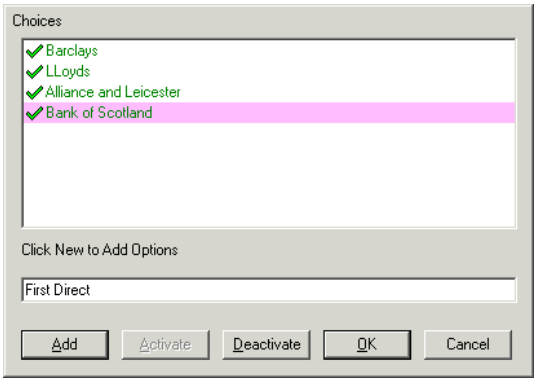


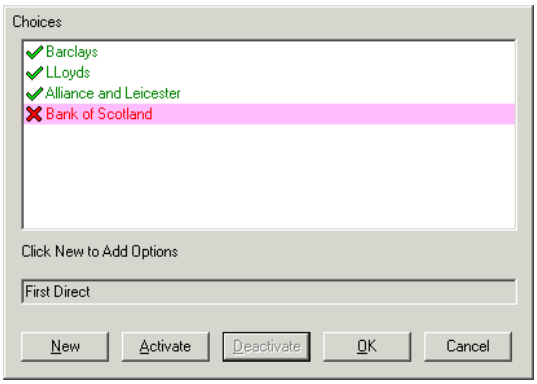
Please see next page for more information.

Maintenance

To enter your selection of choices:

- Click the ***New*** button and add your first option into the *Click New to Add Options* field.
- Press ***Enter*** on your keyboard or click the ***Add*** button, to add the entry into the Choices section of the control.





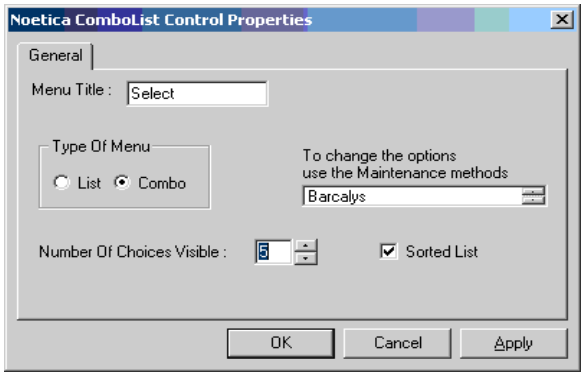
You can't delete any of the options once they have been entered, but you can deactivate entries so that they are not shown to the agents when taking calls:

- Select the option and click the ***Deactivate*** button.
- To reactivate your choice, select it and click ***Activate***.

Activated options display a green tick, deactivated options a red cross.

Back in the Property Page

After you have entered your choices in the *Maintenance* page, go back to the control *Properties* page, select the number of choices that you wish to show to the agents at any one time.



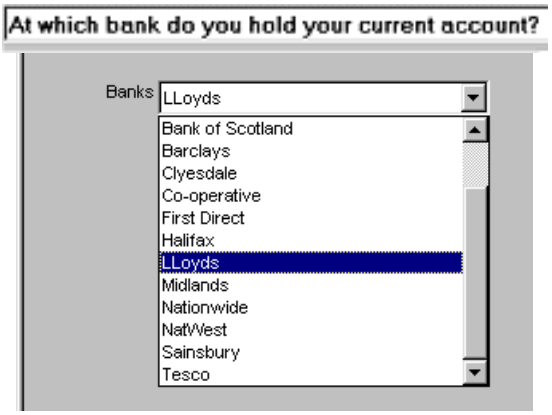
General Use when Taking Calls

In our example we display a list of bank names.

To select the required item:

- Click your left mouse button onto the arrow of the combo box to open the drop down menu with a selection of different banks.
- Select the required bank name from the list by clicking your left mouse button on the bank name.

You can use your mouse pointer and the vertical scroll bar to move up and down the screen, or you can use the arrow keys to the right of your keyboard



CRM PROPERTY

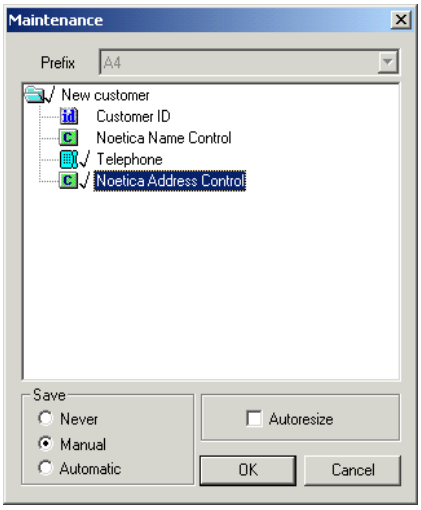
The *Noetica CRM Property* control enables the modification of customer details set up in Customer Relationship Management. The control can be positioned at strategic points anywhere within the callflow.

Appearance 

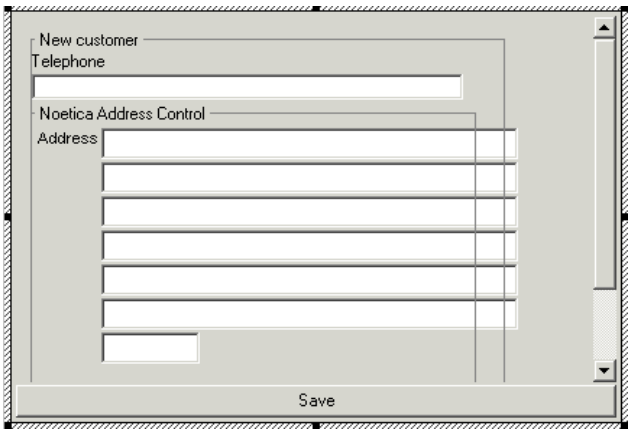
Maintenance

Right click on the *CRM Property* control and select ***Maintenance.***

- The prefix or name of the CRM used in the Callflow is automatically displayed.
- Tick the controls that you want to be visible in the CRM Property control, for example 'Telephone' and ‘Address’.
- Next, select **Save Manual**, to display a save button, which agents will need to click to save changes manually or select **Automatic** to auto save any changes made.
- If *Autoresize* is selected the control will automatically resize itself depending on the size of the selected items.



The CRM Property control will now display all options controls that you have ticked in the *Maintenance* page.



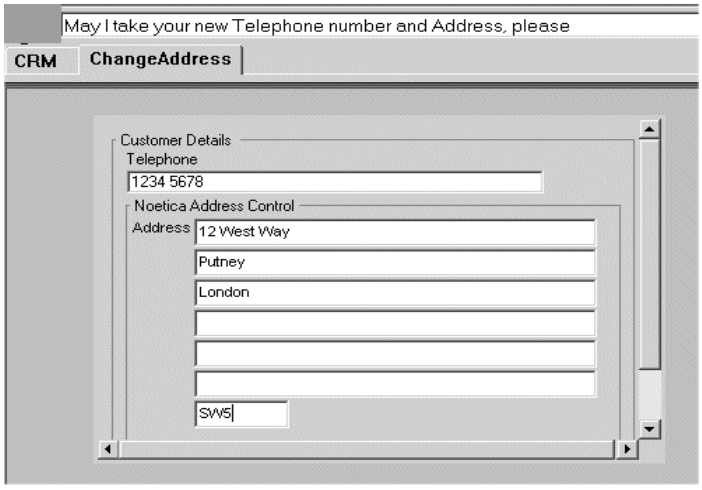
You can set a calculation '***Calculation – Set – CustomerID'*** for the CRM Property control to ensure that the customer details are automatically updated, if agents select another customer in the CRM using the F2 key and CRM Search.

General Use when Taking Calls

On reaching the *CRM Property* control, details for the selected customer are displayed, for example the customer's telephone number and address details.

To modify and update the information:

- Click your left mouse button into the relevant fields and replace the existing information with the new details, as required.
- To clear the existing information first, before updating details, press F2.
- If a ***Save*** button is displayed, you need to press the *Save* button to commit the changes to the database and to update the customer record. If no **Save** button is displayed, the changes will be save automatically



DATE OF BIRTH

The *Noetica Date of Birth* control allows the capture of a caller's date of birth.

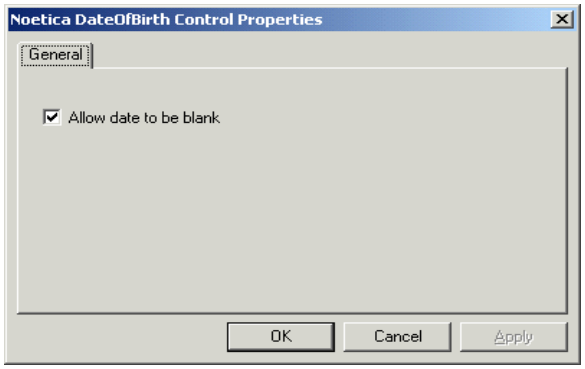
Appearance

Properties

Right click on the control and open the *Properties* dialog:

- Tick the ***Allow date to be blank*** option to allow for no date to be entered when taking calls.

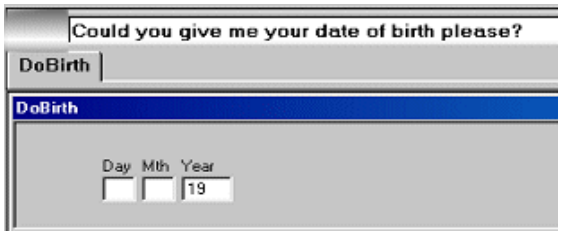
If the option is <u>not</u> ticked, the entry of a date is compulsory



General Use when Taking Calls

To enter a caller's date of birth:

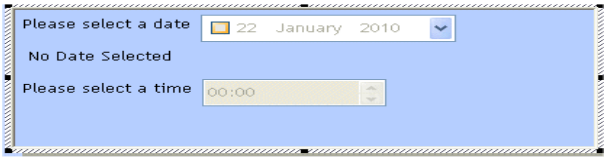
- Click the left mouse button into the ***Day field,*** *to* enter the caller's day of birth.
- Use the Tab keys ⇆ on your keyboard to move into the ***Month*** and ***Year*** fields, to enter the month and year of birth.
- Press Shift⇧ and Tab on your keyboard to move back to the previous field.



DATE TIME PICKER

The *Noetica Date Time Picker* control allows the capture of any date (past, present and future) and the capture of the time.

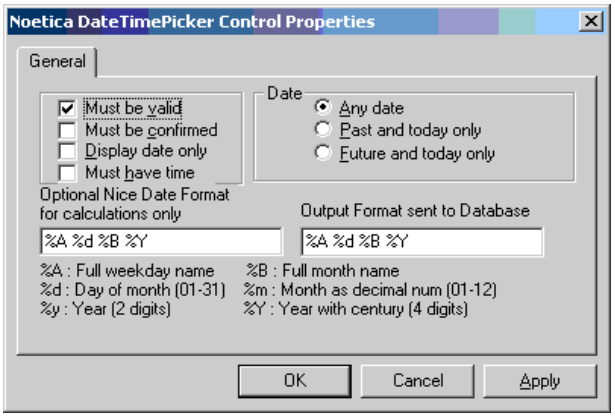
Appearance



Properties

Right click on the control and open the *Properties* dialog and tick any options as required.

- To set a calculation to display the time selected, for example in the agent dialogue, enter the desired date format into the ***Optional Nice Date Format*** field.
- To export entries of the *Date Time Picker* control to another database, enter the desired date format in the ***Output format*** field.

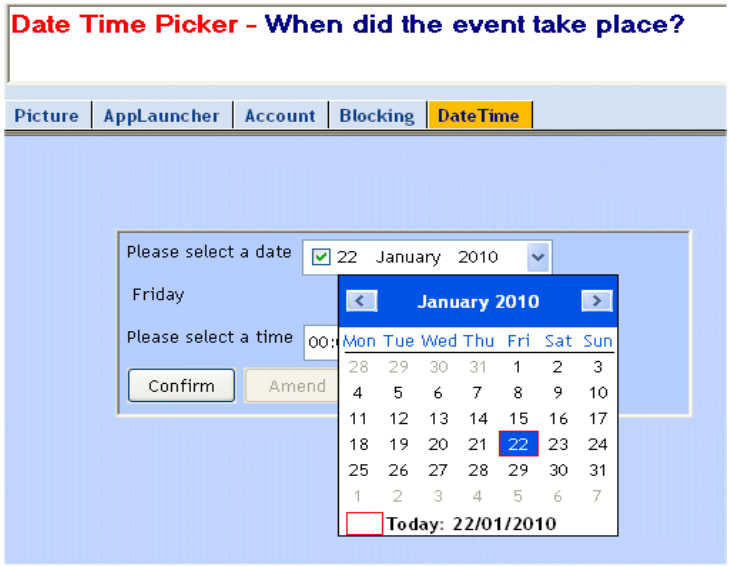


Must be valid	Only enables the selection of valid dates from the diary page in Take Calls. If *Past and today only* is ticked, agents can only select dates for today and in the past.
Must be confirmed	If ticked, agents have to click the *Confirm* button before they can move to the next control.
Display dates only	Dates will be displayed without the time option.
Must have time	Display the time field without the tick box option
Any date	Enable the selection of today's date, past and future dates.
Past and today only	Only enable the selection of today's date and dates in the past.
Future and today only	Only enable the selection of today's date and dates in the future.

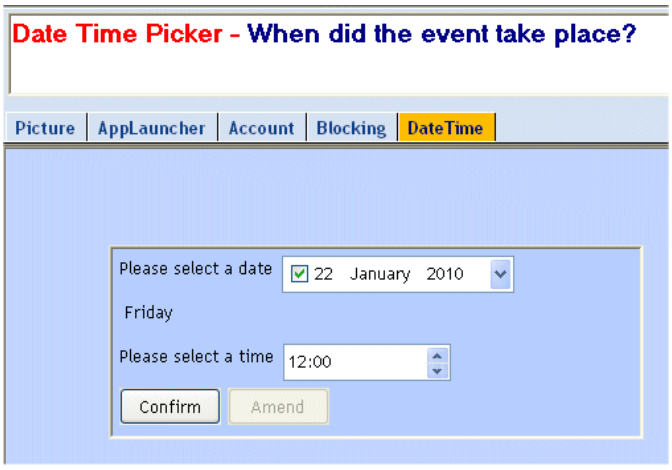
General Use when Taking Calls

To select a date:

- Click the arrow of the ***Please select a date*** field, to open the diary page.



- Locate and select the required date. A tick will automatically be placed into the *Please select a date* box.
- If the time option is displayed, place a tick into the ***Please select a time*** box and select the time, as required.

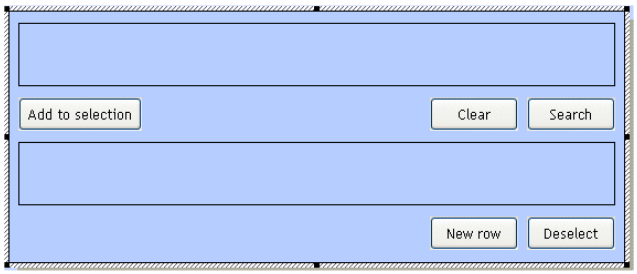


- If the ***Confirm*** button is displayed, click the button to confirm the date and time selected.
- To change the date and time that you have entered, click the **Amend** button and select the appropriate date and time, repeating the above steps.

DATA VIEWER

The *Noetica Data Viewer* control displays information from a data table or view in a grid format and allows agents to select existing records and to create new records.

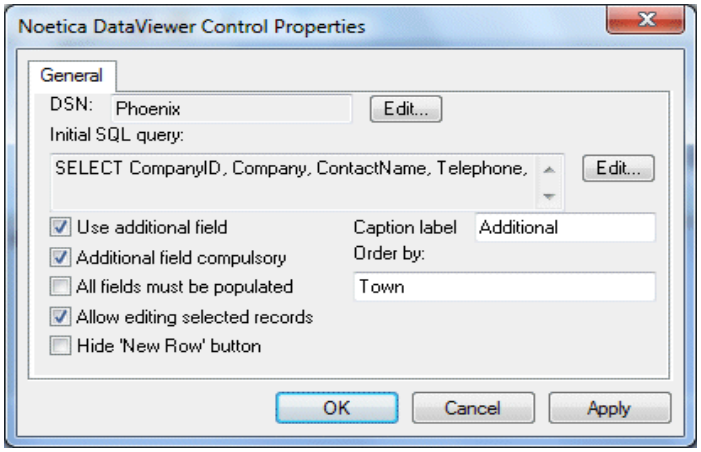
Appearance



Properties

Right click on the control and open the *Properties* dialog.

- Choose the required *Data Source* in the **DSN** field.
- Select the table and fields from the data source to be used, entering a corresponding SQL statement or using the *DataViewer* wizard in the *maintenance* of the control.

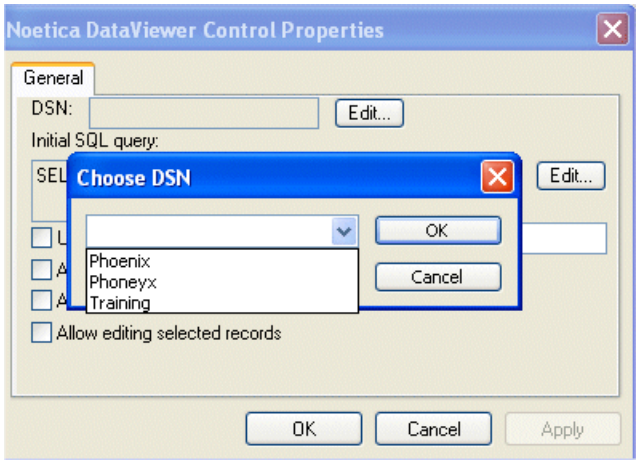


Option	Tick to
Use additional field	Add an extra column to the selection area of the control.
Additional field compulsory	Ensure that agents enter information into the added column, before they can move on to the next section.
All fields must be populated	Ensure that information has been entered into all fields, before agents can move on to the next section.
Allow editing selected records	Allow agents to modify/ change selected details.
Hide ‘New Row’ button	Remove the **New row** button from view at run time.

Entering a SQL query

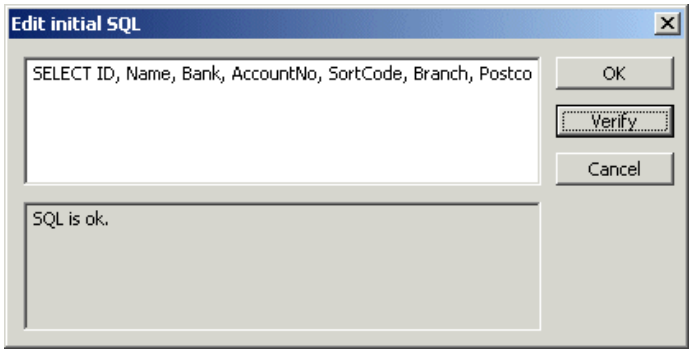
In the *properties* page of the *Data Viewer* control

- Identify which data source you wish to use.
- Click the *Edit* button on the **DSN** field and select the data source name, as required, from the drop down menu.



Next, you can edit the initial SQL query to determine, which table and fields from the selected data source you wish to use.

- Click the *Edit* button on the **'Initial SQL query'**.
- In the text box now displayed, type the appropriate SQL statement, i.e.: *"Select column 1, column 2… from table where condition=".*



- Click the ***Verify*** button to check that the specified table and columns are valid. If this is not the case, an error message will be displayed.

Instead of entering a SQL statement, you can select the required data table and fields for a selected data source in the maintenance option of the control, using the DataViewer Maintenance *wizard.*

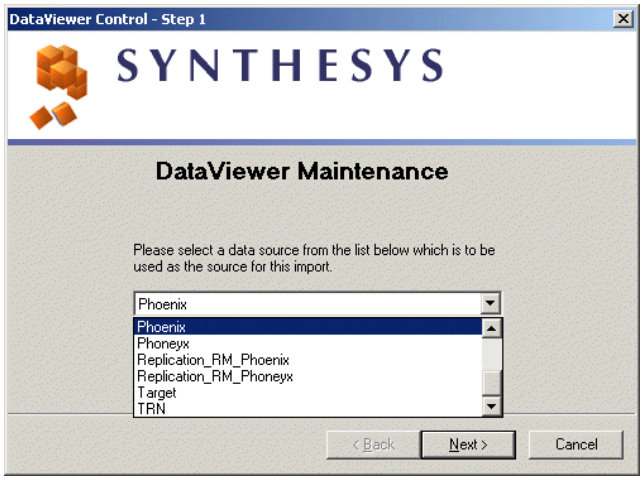
Please see the next page for more information.

The DataViewer Maintenance Wizard

Step 1: Selecting the Data Source

In the *maintenance* page of the *Data Viewer* control:

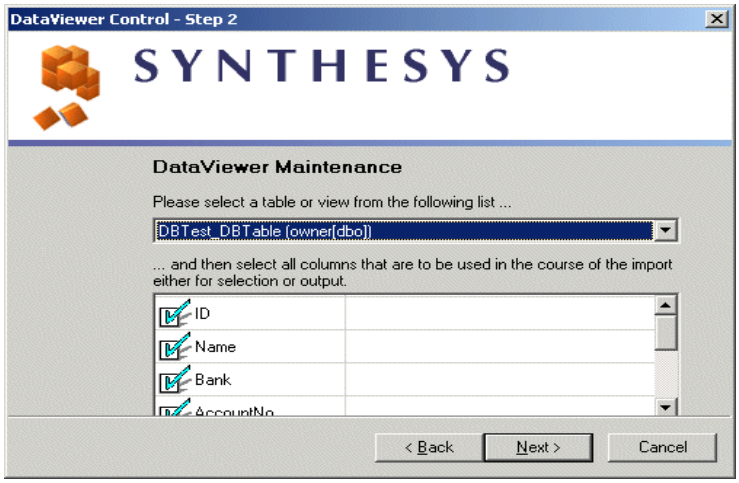
- Select the name of the data source that you wish to use.
- If you have selected the data source in the *properties* page of the control, check that the correct data source name is displayed in the *DataViewer Maintenance* wizard. Move to the Next> page of the wizard.



Step 2: Selecting the Data Table and Fields

The next page of the *DataViewer Maintenance* wizard will prompt you to:

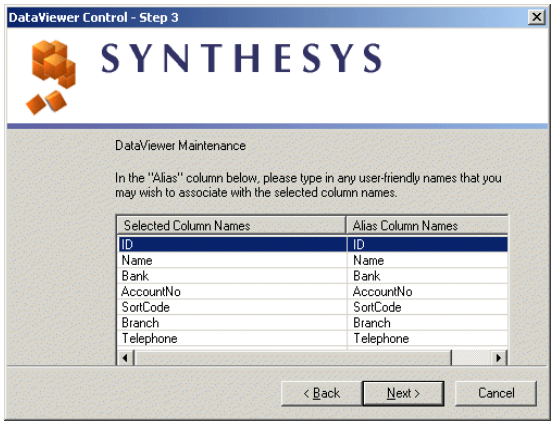
- Select the required table or view from the selected data source.
- Check that all columns that you wish to use are ticked.



Step 3: Alias Column Names

The first column contains the selected column names, the second column the ‘Alias column’ Names.

The ‘Alias column’ names can be edited, to associate more user-friendly names with the selected column names on the left.

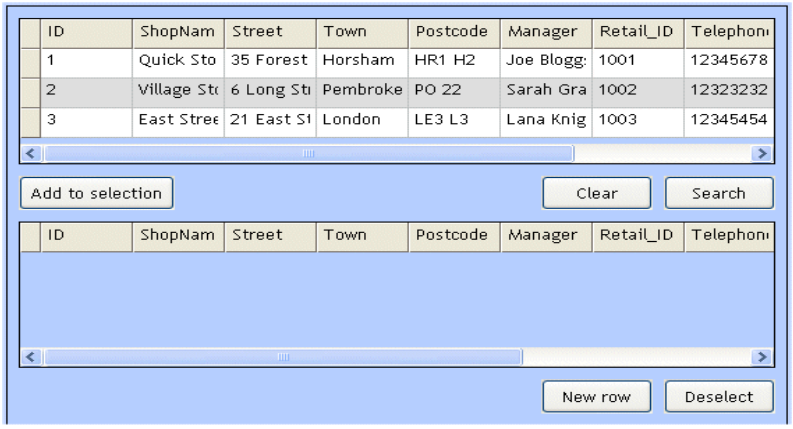


Step 4: Adjusting Column Width

This page of the *DataViewer Maintenance* wizard allows you to adjust the column width of the selected columns, before you click *Finish*, to display the associated data.

Display Data

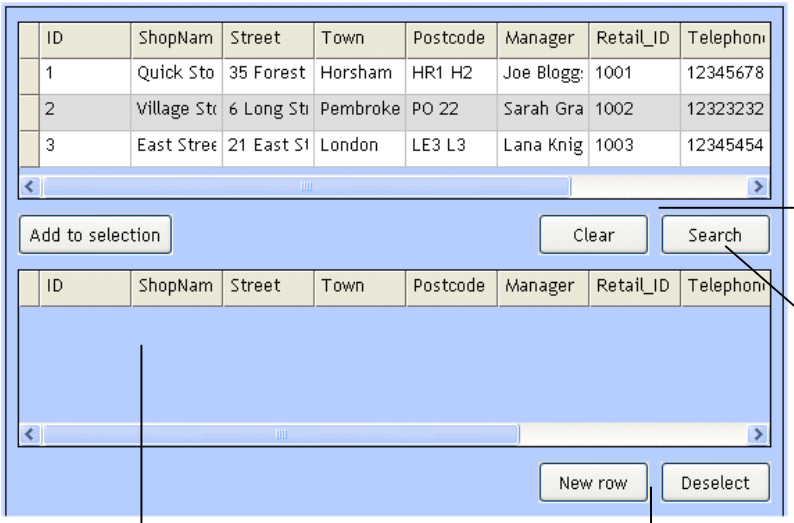
Having clicked the *Finish* button in the *DataViewer Maintenance* wizard, the records associated with the selected data source, table and fields are displayed.



If required, users can set the RowsSelected property to compulsory, to ensure that agents at run time select and add at least one record to the selection area using the Add to selection button, before moving to the next section.

General Use when Taking Calls

The *Noetica Data Viewer* control displays information from a data table or view in a grid format and allows you to select existing records and to add new records.



Clear button to clear records displayed

Search button to enable the search for a specific record

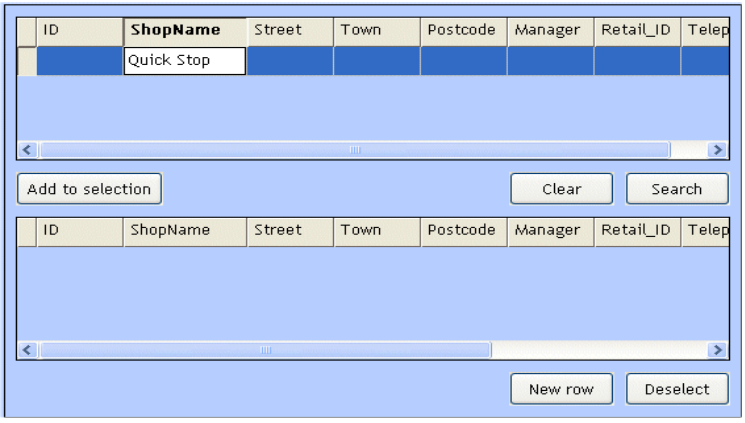
Selection Area

Buttons to add or deselect (remove) rows from the selection area.

Searching for a specific Record

Providing that no other records are displayed in the *Data Viewer* control, you can search for a specific record. If existing records are displayed:

- Click the **Clear** button first, to remove the records displayed, before typing your search criteria into the relevant field, i.e. customer name into the name field.
- Click the ***Search*** button to bring up the associated record.

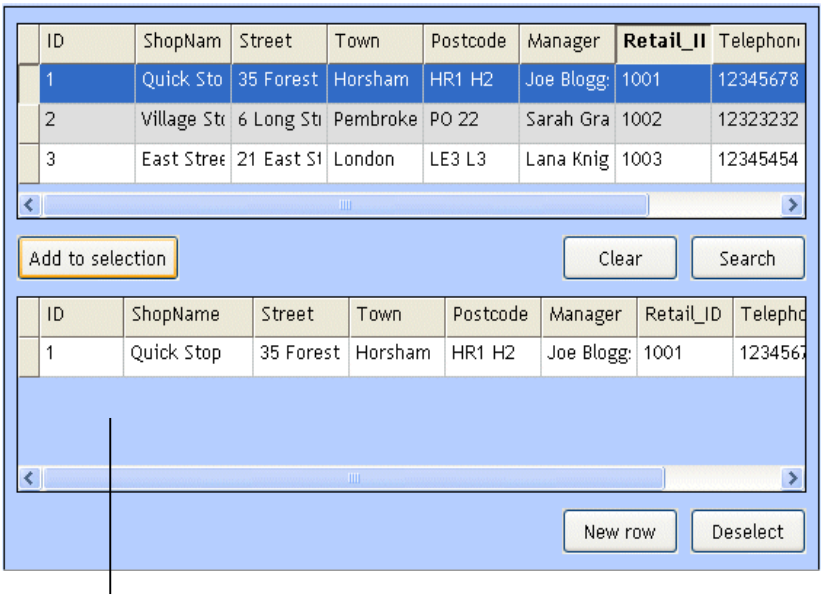


If all available fields must be completed before you can move on, a relevant message will be displayed.

Adding Records to the Selection Area

To add a record to the selection area of the *Data Viewer* control

- Select a record as required and click the ***Add to Selection*** button.

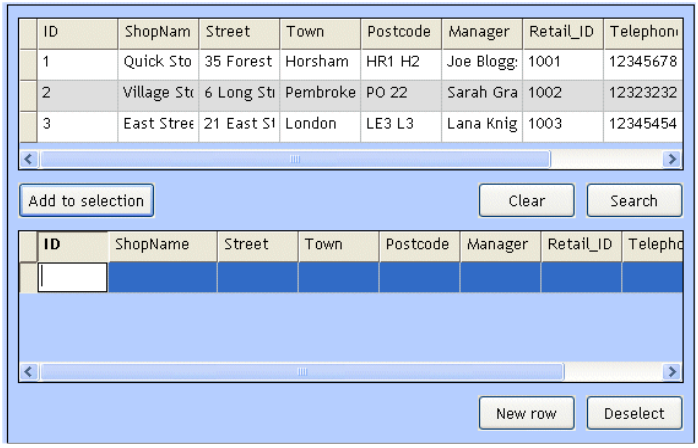


Selection Area

*If you need to add at least one record into the **Selection area** before you can move on, a relevant message is displayed.*

Adding new Rows

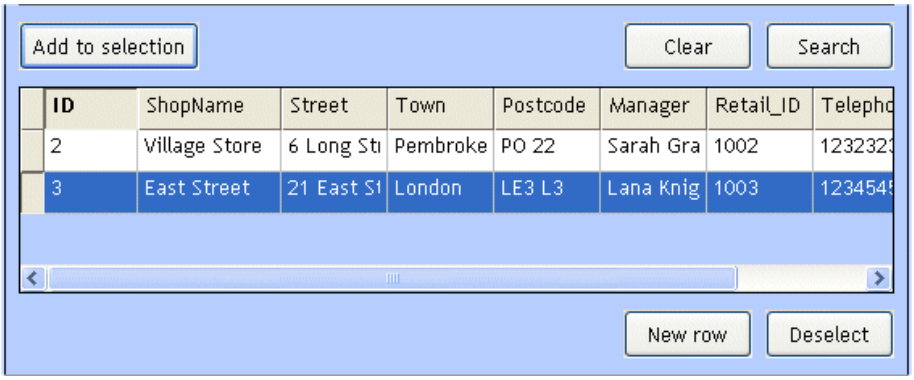
- Click the *Add new row* button, to add a new row to the selection area of the *Data Viewer* control.
- Double click your left mouse button into the first field, to enter information into the fields available.
- Use the tab keys on the keyboard to move to the next fields and back again.



Deselecting Rows

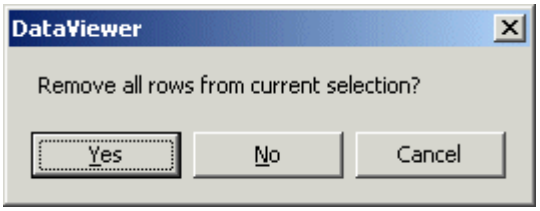
To deselect and remove a specific record only from the selection area:

- Select the record that you wish to remove, before clicking the ***Deselect rows*** button.



To deselect and remove all records from the selection area:

- Click the **Deselect rows** button, without first highlighting a specific record.



- Click ***Yes*** to remove all or the rows that you have selected from the selection area.
- If you do not wish to remove any rows, click ***No.***

*If the **RowsSelected** property has been set to compulsory at design time, agents have to select and add at least one record to the controls selection area, using the **Add to selection** button, before they are able to move to the next section.*

When making fields mandatory at design time, a clear message should be entered for the agents.

DATABASE COMBOBOX

The *DB Combo box* control allows users to return data from a user defined table into the Synthesys database by means of a “SQL” statement, containing Column names and the table the data resides in. In addition agents can enter text not contained in the drop down list.

If a database other than Phoenix is used, the database name needs to be entered into the ‘Synthesys.inf’ file.

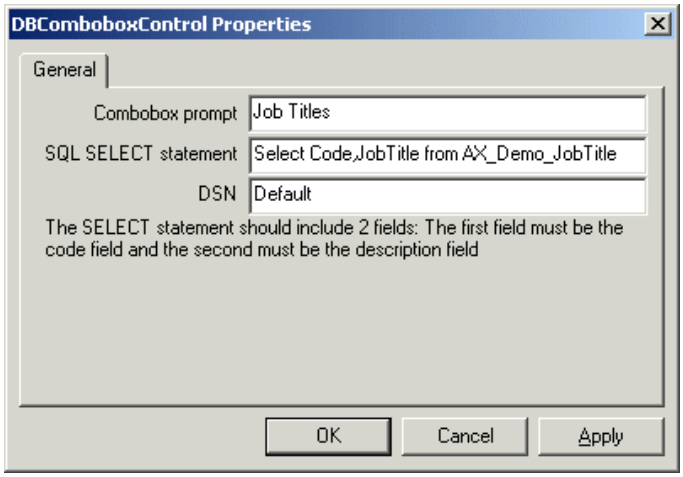
Appearance

Properties

Right click on the control and open the *Properties* dialog.

- In the first edit box, enter a caption for the control.
- In the second, enter a **SQL statement** to return 2 columns to the control.

The first field must be the **code field** and is hidden from agent view, the second field the **description field**, which contains the relevant entries, in our example the Job Titles, is displayed.



The SQL statement can also be entered via a calculation by setting the SQL property. The value of the calculation needs to be a text string. I.e.

```
Calculation SQL()
SQL=”Select column1,column2 from Table_X”
End Calculation
```

General Use when Taking Calls

The *Noetica DB Combo box* displays a list items via a drop down menu, in our example a list of job titles. New items can be added to the existing list.

To select the required item:

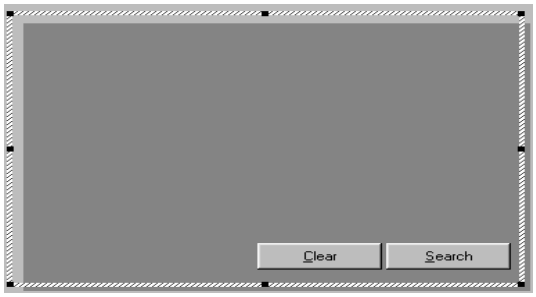
- Locate, in our example the job title, in the drop down list.
- Click your left mouse button on the chosen option, to select it.
- If the Job Title that you are looking for is not displayed, you can type it into the *Job Title* field.

DB TABLE

The *Noetica DBTable* control is typically used to maintain lists of clients and sites. It allows you to carry out searches and updates of client information.

If the Rota option is ticked in ***Properties***, the DB Table can be used in combination with *Theatres* to bring up details of call-out procedures for different area offices. The Theatres need to be set up in the Campaign Editor as part of the Follow-up procedures.

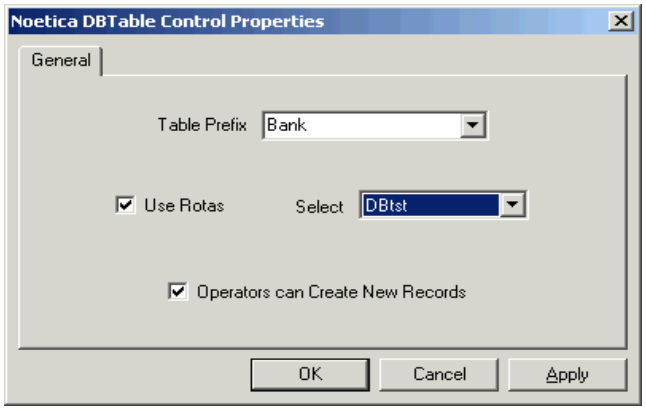
Appearance



Properties

Right click on the DB Table control and select ***Properties***.

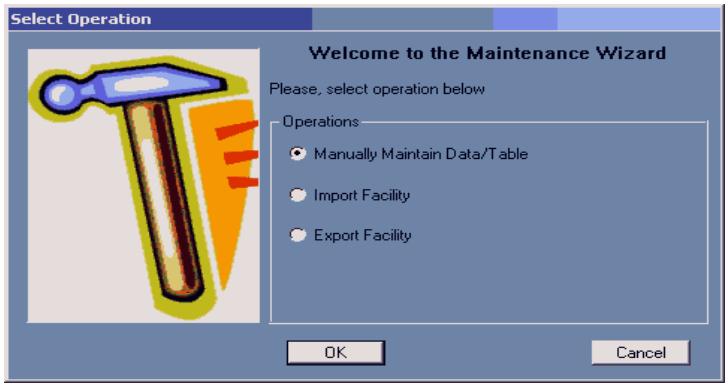
- Enter a ***Table Prefix*** for your DB table.
- To allow agents to create new customer records, tick the ***Operator can Create New Records*** field.
- If the table is used in Call Tracker escalation procedures, tick the ***Use Rotas*** field and select the rota prefix to be used from the ***Select*** drop down menu.
- Click OK to exist the properties page and go to Maintenance of the control to set up your DB table.



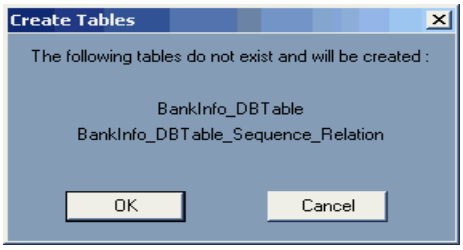
Maintenance

In the first window of the wizard you can select to create or edit a DB Table or to perform an import or export.

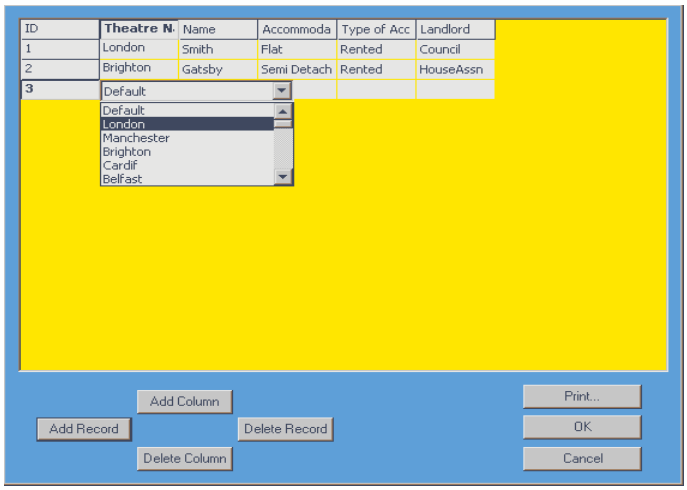
- To create your DB table column fields, select ***Manually Maintain Data Table*** from the options displayed.
- Click OK to continue and to create your DB table



- Click OK in the Create Table dialog to display the DB table.



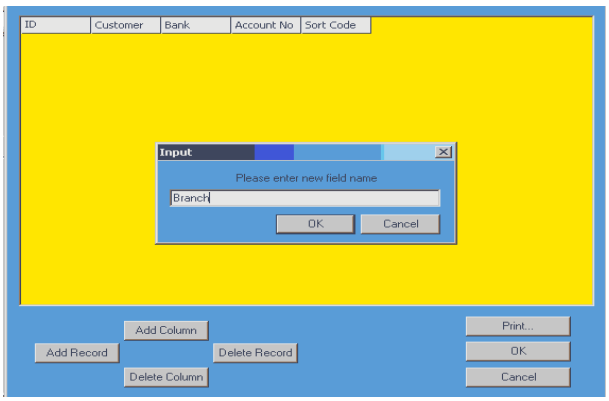
If you are using the DB table with rotas, the ***Theatre Name*** field will automatically display the area offices for the prefix selected and associated records.



Creating Column Headings/ Field Names

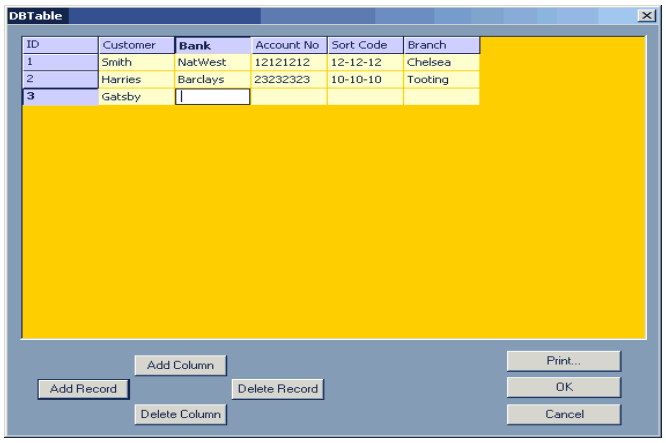
If you do not use the DB Table control with rotas, a column for the ***ID*** number will have been added automatically to the DBTable, but you need to add required *Column Names:*

- Click the ***Add Column*** button to display the Input window and enter the name of your first column field.
- Enter the other *Column Names*, as required.



When you have added all the required column names:

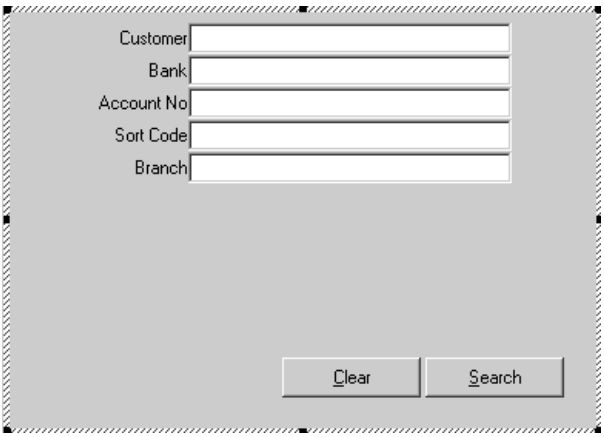
- Click the ***Add Record*** button to add the necessary information.



- To delete existing records, use the Delete Record button.
- To delete existing columns, use the Delete Column button.

When you delete records or columns, a message will prompt you to confirm that you wish to delete the selected column or row of records containing the record selected.

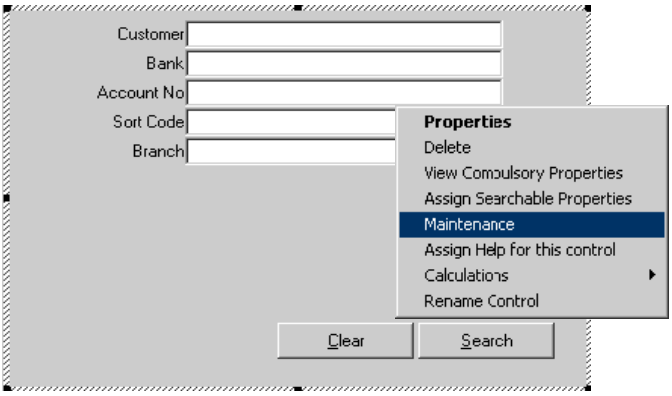
When you have entered all necessary information, click OK to return to your DBTable control now displaying all the Field names/Column headings that you have entered.



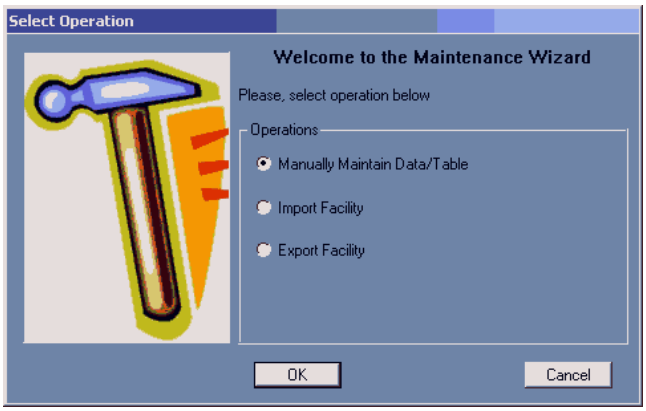
Editing your DB Table control

To edit your DB Table at a later stage:

- Right click on the control and select Maintenance.



The DB Table Wizard opens and you can choose to maintain your Data table, adding or deleting field names and records or to use the Import or Export option.



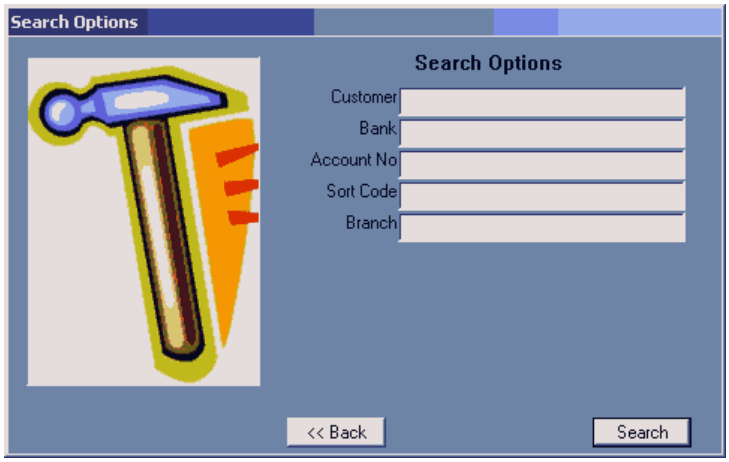
Editing Columns and Records

To edit information in the DB Table at a later time:

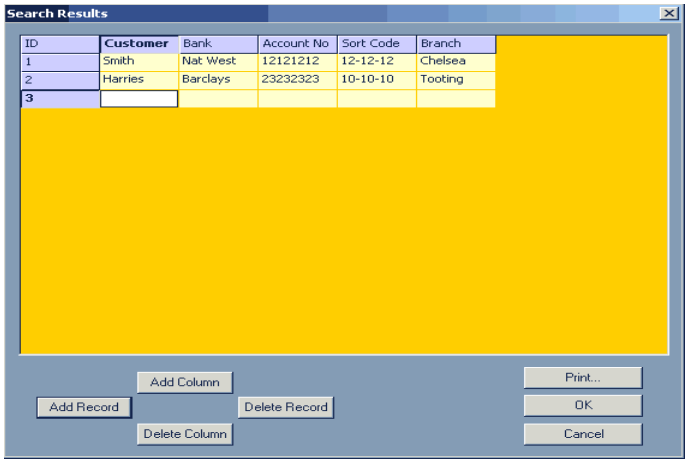
- Click Manually Maintain Data/ Table.
- In the ***Search Options*** window you can search for the customer records that you wish to edit, entering the details into the relevant fields.

If more than 200 records fit your search criteria, the message: ***Too many records returned, refine search*** will appear and you have to redefine your search.

- Click ***Search*** to continue to the next page of the DB Table wizard.
- Click ***Back*** to return to the previous screen.



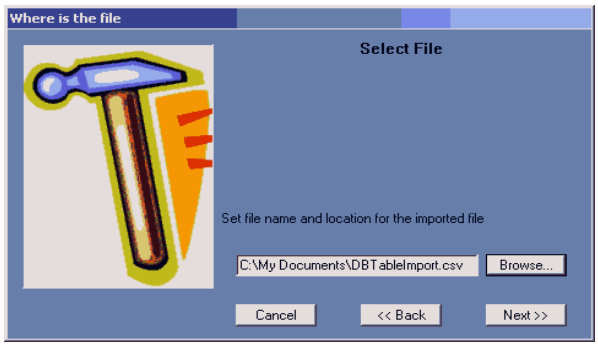
- Clicking the ***Search*** button in the *Search Options* window opens the ***Search Result*** window containing your DB Table information.



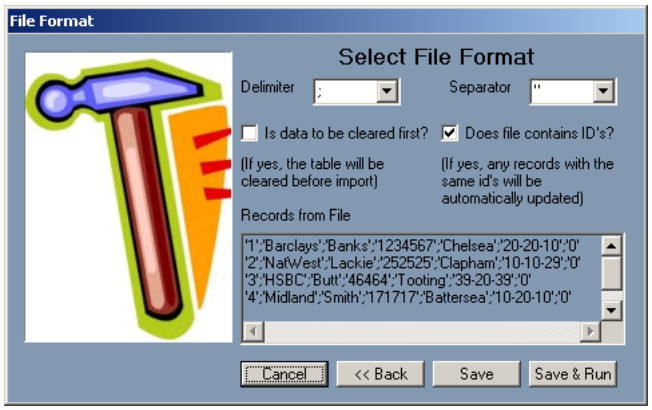
Importing Data into your DB Table

To import data, select ***Import Facility*** in the first page of the DB Table Wizard.

- In the ***Where is the File*** window, enter the path of the file that you wish to import or click the ***Browse*** button to locate the file.



- In the File Format window, select the format and type of import to be performed. Click ***Save & Run*** to start your import immediately.



Records from File: To view Records prior to import.

Delimiter / Separator: Select as required. To import a CSV file, select a comma in the 'Delimiter' field.

Is Data To Be Cleared First: To clear the existing data from your DB Table before importing new data tick the ***Is data to be cleared first box***. To add new records to the existing data, do <u>not</u> tick the box.

Does File Contain Id's: If the file contains ID's, tick the 'Does file contain ID's' box, so that any records in the DB Table with matching ID's can be updated with the records from the import file.

Cancel: will close the DB Maintenance Wizard.

Back: will return you to the previous window of the DB Maintenance Wizard.

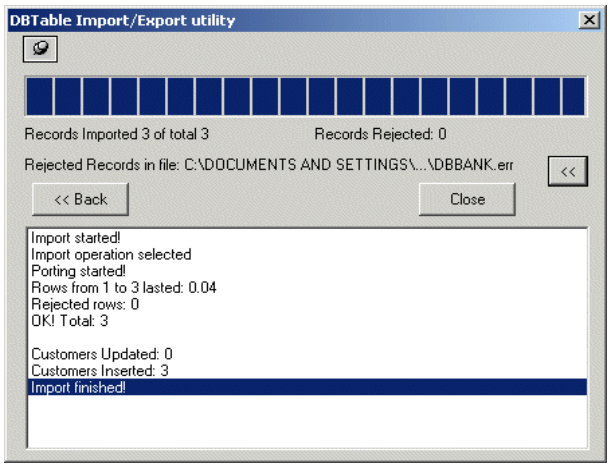
Save: Will store the parameters set above to a configuration file, to be used at a later date to schedule the data import via the Campaign Manager.

Save & Run: Will launch the import program and load the data immediately, as well as save the configuration into a settings file.

The final part of the wizard is the progress and status bar showing the details of your data import.

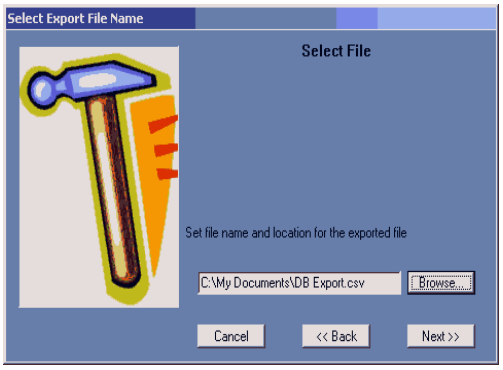
Information displayed includes the number of records imported, the number of records rejected and the location of the rejected file.

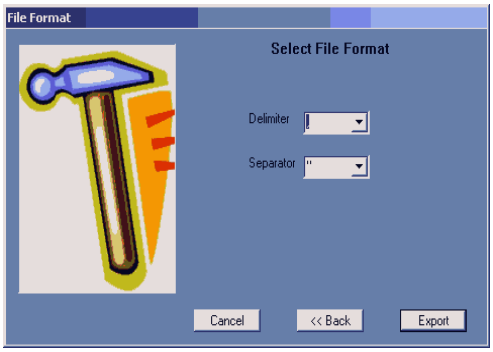
- To display more detailed information, click on the << button.



Exporting Data from your DB Table

- To export data from your DB Table, select Export Facility in the first page of the DB Table wizard.
- Enter (or select using the Browse button) the file name and location for your DB export (Fig1) and click Next>.





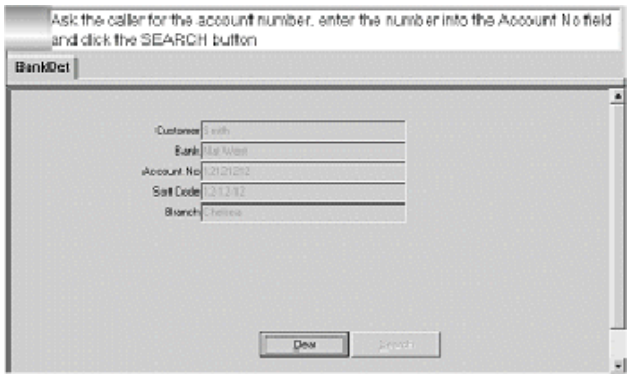
- Select the file format for exporting the data, i.e. a comma in the ***Delimiter*** field to export a CSV (comma separated) file and click ***Export*** to start the export.

The next window of the wizard will show the details of your export, including the records exported and the records rejected.

General Use when Taking Calls

The *DBTable* in our example is used to bring up details of a customer's bank account.

- Enter the caller's account number or other details, as required, and click ***Search*** to displays the associated details.
- To remove the information displayed, press the ***Clear*** button.

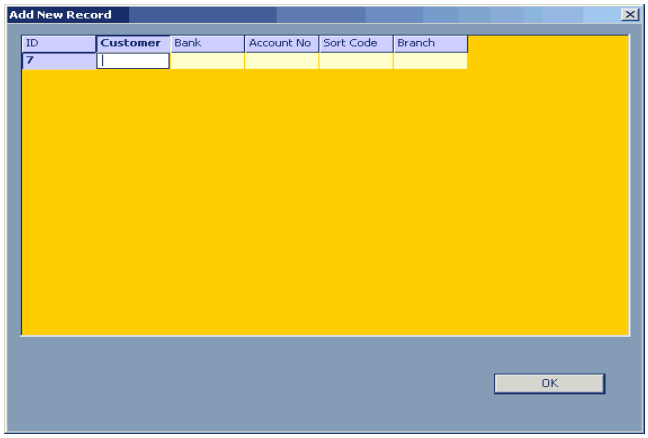


Using a star (*) will bring up a list from which you can select the customer and associated details.

Creating a New Customer Record

Provided that permission has been granted when the control was configured, you will be able to add new customer details to the DBTable control. If no customers are found, following a search, the ***No Records*** window will open.

- Click the ***Create New Record*** button.
- Enter details for the new customer into the each of the available fields in ***Add New Record*** window and click OK to display the customer details.



DB RELATIONAL TABLE

The *Noetica DB RelTable* control (Database Relational Table) uses two look up tables/views, which are created and maintained by the customer.

The first table, the ***Data Table***, contains, for example, details of sites/agents while the second table, the ***Reference Table***, contains the allocation criteria with a criteria column (i.e. postcode but could be anything) and an id/key column, which then links back to the site/agent table.

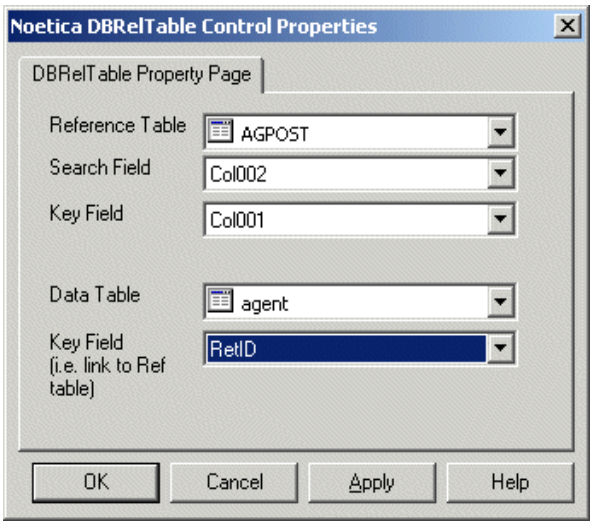
Appearance

Properties

Right click on the control to open the *Properties* dialog and using drop down boxes:

- Select the ***Reference Table*** that contains your search criteria and the column that will determine the search criteria (for example, the postcode) and the column that contains the key (i.e. the link to the *Data Table* i.e. site/agents ID).
- Next, select the ***Data Table*** containing the site/agent details and the column that contains the key, i.e. the link to the *Reference Table*.

Reference Table: The DB table containing your search criteria.



Search Field: The columns that will determine your search criteria, i.e. postcode.

Key field: The columns that will link back to the site/agent table.

Data Table: The DB tables containing the site/agent details.

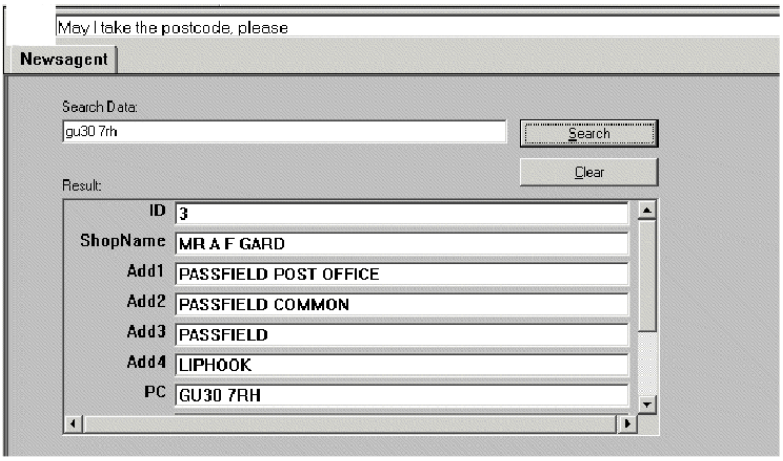
Key field: The columns that contain the key to link to the *Reference Table*.

General Use when Taking Calls

The *Noetica DB RelTable* control displays a *Search Data* and *Result* field and a *Search* and *Clear* button. The search criteria to be entered are determined by the search criteria specified when the control was configured.

In our example the search criteria is based on the postcode for an area office. To display details of the required area office:

- Enter the postcode in the ***Search Data field***. The postcode must be entered with a space, i.e. gu30 7rh.
- Click the ***Search*** button to bring up a record in the ***Result*** fields, displaying the address of the area office.



- Click the *Clear* button, if you wish to clear the information displayed in the *Result* fields.

If there is more than one search field match in the reference table, an ambiguity list will be displayed, from which the agent can select the required record.

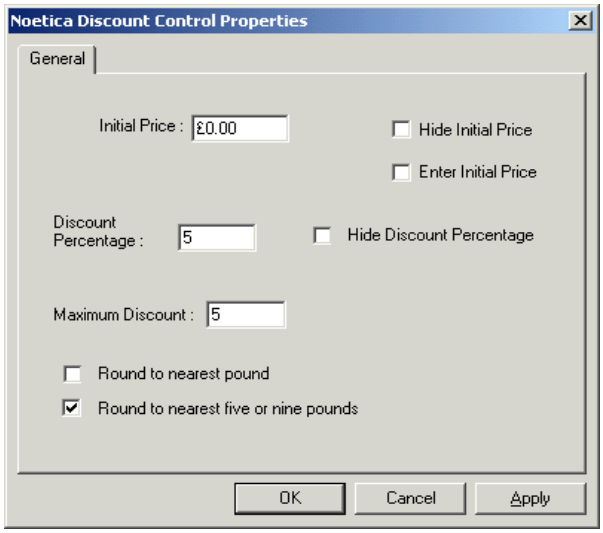
DISCOUNT

The *Noetica Discount* control is used for calculating discounts based on an initial price and discount percentage. The resulting price is displayed to the agent in the ***Discounted Price*** field.

Appearance

Properties

Right click on the control and open the *Properties* dialog, where you can configure details, such as price, discount percentage and the general appearance of the control.

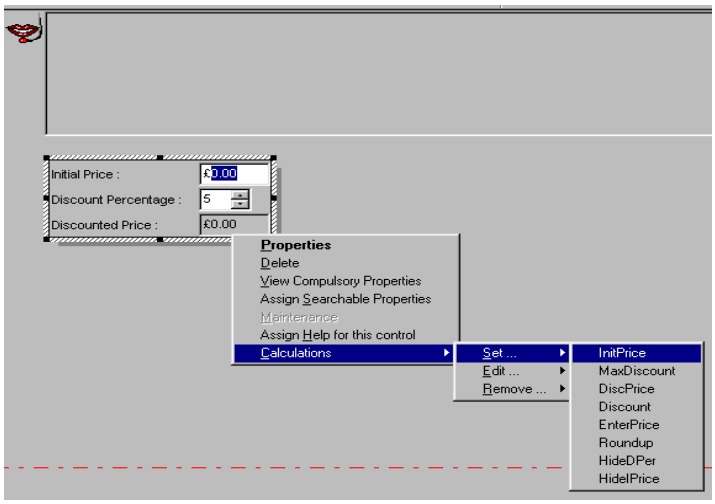


Initial Price	The initial price can be entered in the Initial Price field, or it can be carried forward from another control using calculations.
Discount Percentage	The available discount is entered in the Discount Percentage field. If the ***Roundup Discount*** field is ticked, the total amount, after deducting the discount, will be rounded up to the next full pound.
Hide Initial Price Hide Initial Discount	Tick the Hide Initial Price and/ or Hide Discount Percentage fields if you do not wish to display these fields to the agent when taking calls.
Maximum Discount	It is possible to enter the maximum discount percentage available, which cannot be exceeded when taking calls.

Using Calculations for Displaying the Initial Price

To set up your calculation:

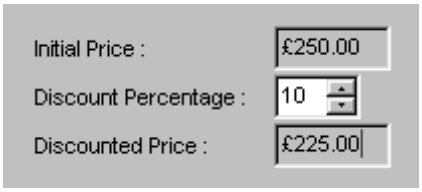
- Right click on the control and select **Calculations – Set - InitPrice** from the drop down menu.



General Use when Taking Calls

Depending on the configuration, the Discount control may show

- The Discounted Price field only
- The Discounted Price field, plus the Initial Price and Discount Percentage fields:



The initial price will either be entered by the agents or it can be brought forward automatically via a calculation.

DO NOT CALL

The *Noetica Do Not Call* control is used to remove a customer from an outbound call list if the customer phones in, before the callback is due.

In the Outbound Manager the call will be displayed as a completed call, represented by a chequered flag, with a CRM History event text of **'Queue *Changed State to Done'.***

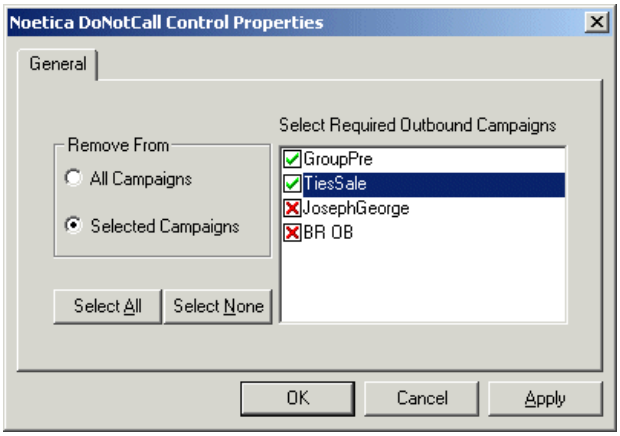
Appearance 

Properties

Right click on the control and open the *Properties* dialog. You can remove a customer from the queue of *All Campaigns* of *Selected Campaigns* only.

To remove a caller from selected campaign only:

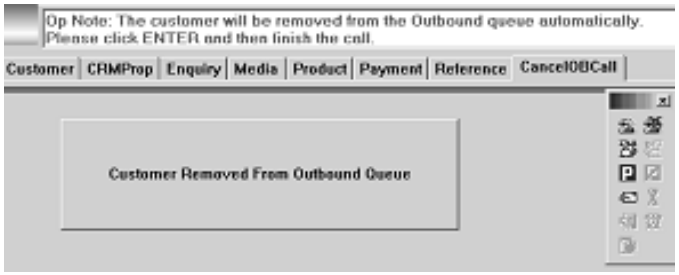
- Select the ***Selected Campaigns*** option to display a list of your Outbound call lists.
- Click on the box next to the Outbound list from which you want to remove the caller, to show a green tick.
- To select or deselect all Outbound lists, use the Select All and Select_None buttons.



General Use when Taking Calls

The customer scheduled for a call back will automatically be removed from the queue in the Outbound Manager, when the agent passes the ***Customer Removed from Outbound Queue*** control.

- Agents simply press ***Enter*** on the keyboard, to move to the next screen and then click OK in the *Conclusion* window to finish the call.



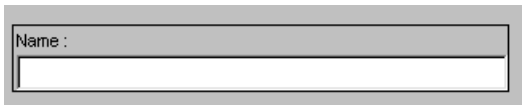
When the call has been completed, the outbound call list will be updated.

A chequered flag will be displayed next to the customer record in the Outbound Manager, showing a completed call with a CRM History event text of '**Queue *Changed State to Done'.***

EDIT

The *Noetica Edit* control can be configured to allow numerical or text input only or to accommodate alphanumeric input.

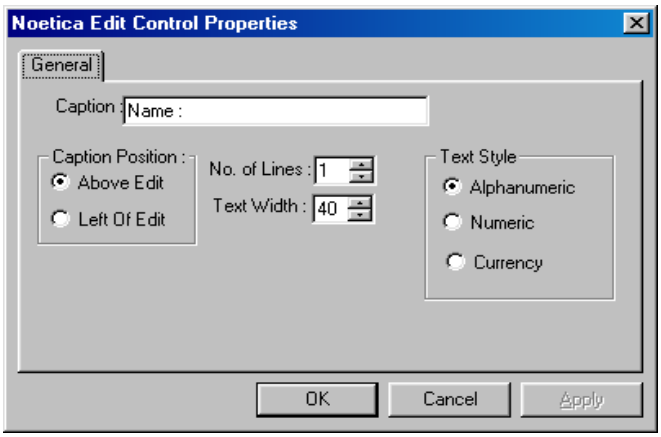
Appearance 



Property Page

Right click on the control and open the *Properties* dialog.

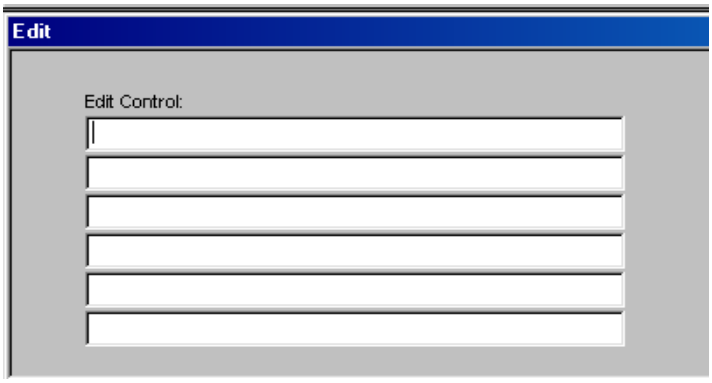
- Enter a ***caption*** for the control. The caption position can be set to ***Above Edit*** or ***Left of Edit***.
- The text width can be altered (to a maximum of 40).
- Text style can be set to Alphanumeric/ Numeric/ Currency.
- If text style is set to Alphanumeric, the number of lines in the control can be altered (to a maximum of 10).



General Use when Taking Calls

To enter text into the Edit control:

- Click the left mouse button into the first line of the control and enter your text or numbers, as required.
- Use the Tab keys ⟵ ⟶ to move to the next line down.



EDITABLE CALCULATION

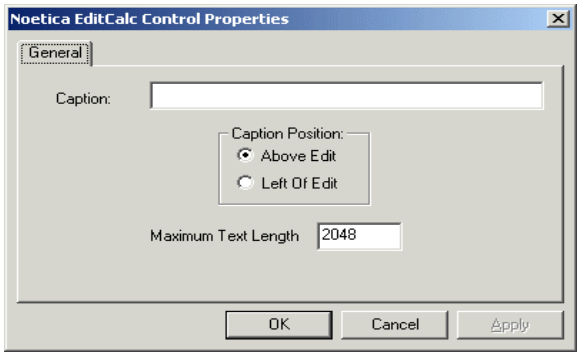
The *Noetica Editable Calculation* control (EditCalc) works like a text control, but the initial Input Value can be set to a calculation. Agents can then edit this field, and the edited value will be saved to the database.

Appearance 

Properties

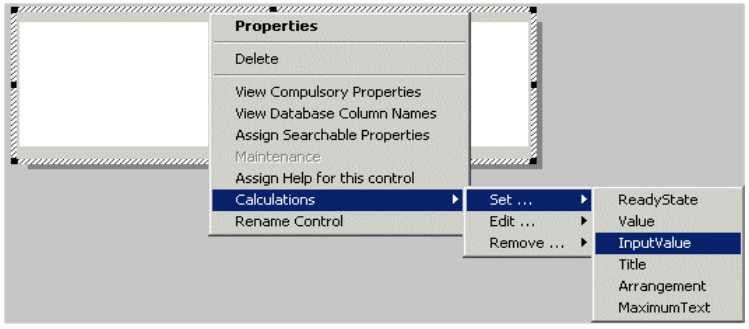
Right click on the control and open the *Properties* dialog.

- Enter a ***caption*** for the control. The caption position can be set to ***Above Edit*** or ***Left of Edit***.
- The text length can be set to a maximum of 2048 characters.



To set the desired calculation:

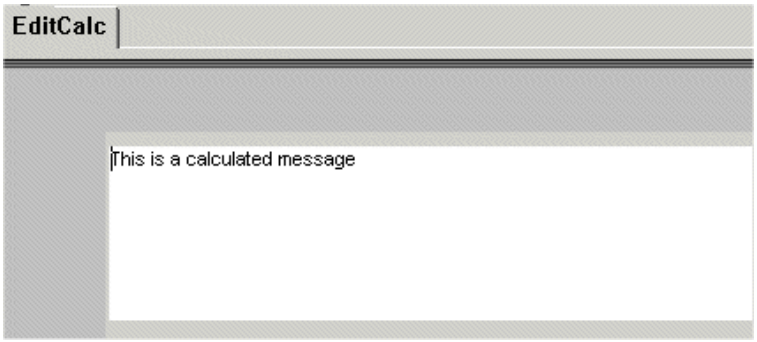
- Right click on the *Editable Calculation* control, select **Calculation – Set – Input value.**
- Enter the required text for your calculation: Editcalc="This is a calculated message".



General Use when Taking Calls

When agents reach the N*oetica Editable Calculation* control, a predefined text, as set up in the calculation, will be automatically displayed.

- Agents can view the details and add additional information, overwrite the information altogether, if required, or leave the text already displayed unchanged, as required.



FORMATTED EDIT

The *Formatted Edit* control is used in conjunction with ***Regular expressions***, to specify acceptable entries for the control.

If the entry fails validation, an error message is presented and agents are prevented from advancing in the callflow, until they enter information that passes validation in the control.

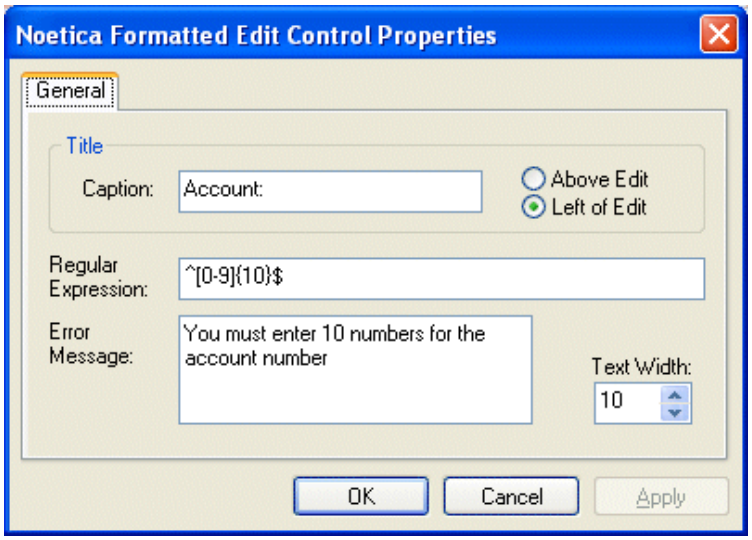
Appearance

Properties

Right click on the control and open the *Properties* dialog.

- Enter a caption
- Enter the required ***Regular Expression***, and ***the Error message*** that is to be displayed to the agents, should the entry not match the criteria specified.

The Regular Expression in our example allows the entry of numeric characters (0-9) but specifies that it will only accept an entry of exactly 10 numbers, no more and no less.



In the Error message field, we have entered the message: *You must enter 10 numbers for the account.*

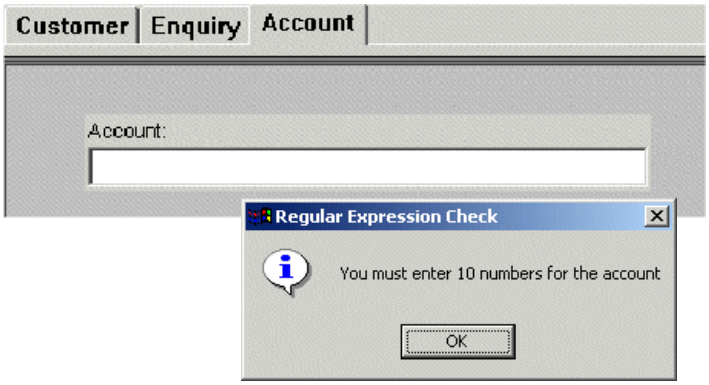
General Use when Taking Calls

The *Noetica Formatted Edit* control uses ***Regular expressions***, to stop you from advancing in a callflow, if the entry does not match the criteria specified, i.e. 10 numbers, or an @ sign for an email address.

In our example, the *Formatted Edit* control has been set up to stop agents from advancing in a callflow, if account number does not contain 10 numbers.

- If agents enter any other characters, or if the account number entered is longer or too short, an error message will be displayed prompting agents with the action to take.

In our example the message reads: You must enter 10 numbers for the account.



When agents enter the required 10 numbers, as required, they can move to the next section of the callflow.

FOLLOW UP

The *Noetica Follow-up* control is used to handle calls that are a follow-up of a previous call.

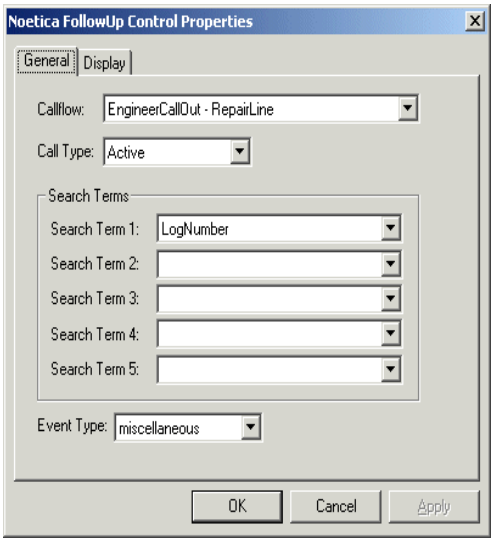
For example, an engineer may phone the ***Engineer Callback line*** to request further information regarding a repair or to pass on details about the solution of a problem, as reported in a ***Repair Line*** campaign.

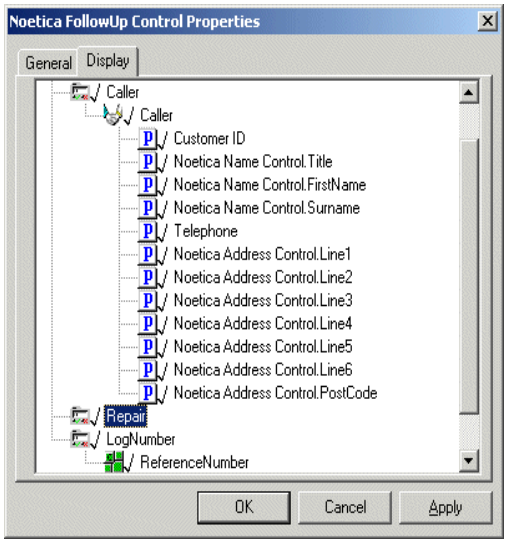
Appearance 

Properties

Right click on the control and open the *Properties* dialog.

- Select the *Callflow* that the current campaign is a *Follow-up* to, as well as the ***Call Type*** and any ***Searchable fields*** related to the selected callflow.
- In the **Details** section of the properties page, tick the fields of the selected callflow that you wish to display in the current Follow-up callflow.





Please see the next page for more information.

Details of the Follow Up Control Properties

Callflow	Select the callflow that this current call is a follow-up to
Call Type	Refers to the call status that the search will look for, i.e. Active, Inactive or Archive calls etc.
Search Terms	Consists of up to five fields, which allow the user to select "Searchable Properties" that have previously been set up in the selected callflow. Search Terms are used in conjunction with calculations.
Event Type	Refers to the event type to be attached from the callflow selected in the 'Callflow' field. At present the only event type available is 'miscellaneous'.
Event Type – Display	Any "ticked" fields will be displayed as headings in the Follow-up control.

Search Terms and Calculations

Using Search Terms in conjunction with calculations enables the user to filter out particular customer records to be displayed to the agent.

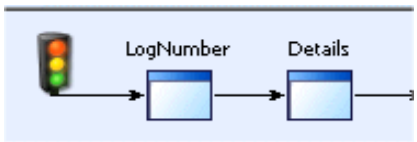
You can display, for example, only customers who live in a particular postcode area, or filter out and display only one customer record at a time, corresponding to a 'Log number' passed on by an engineer.

Search Term

In our example, we wish to follow up actions taken on our 'Repair Line' campaign and therefore use the Follow-up control in our 'Engineer Callback' callflow.

When calling, the engineer will refer to a log number generated in the initial callflow.

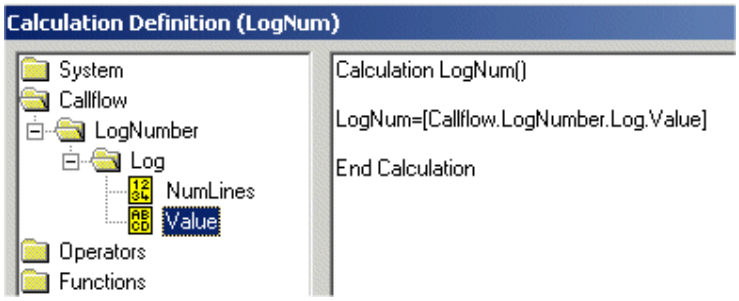
In order to filter out customer data based on the 'Search Term(s)' selected, in our case **Search Term 1: Log Number**, we have created a section called 'LogNumber', in which we collect the log number using an 'Edit' control and a section called 'Details', containing the Follow-up control.



Calculation

The calculation is set on the Follow-up control in the 'Details' section, based on the 'Edit' control in the 'LogNumber' section:

Calculation – Set – SearchValue1
The calculation will look roughly like this: LogNum=[Callflow.LogNumber.Log.Value]



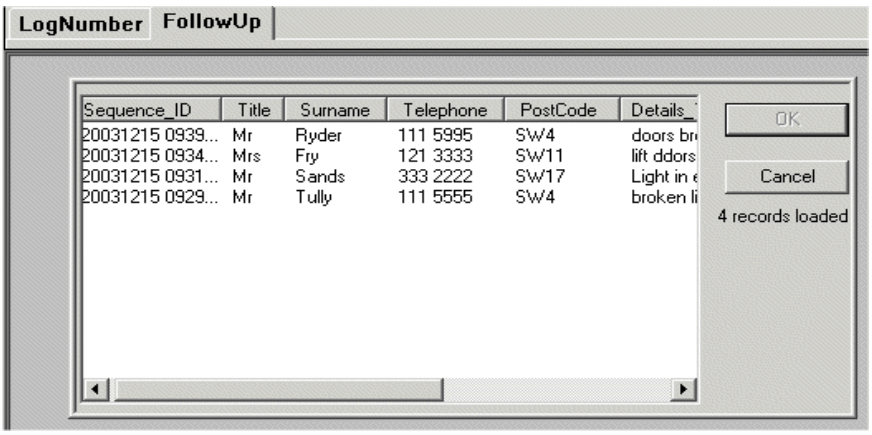
General Use when Taking Calls

In our example, an engineer will phone the ***Engineer Callback line*** to pass on details about the solution of a problem, as reported in a ***Repair Line*** campaign.

Usually ***Search Terms,*** for example *a Log Number,* are specified when configuring the Follow-up control, to filter out a specific customer record.

- Agents ***must select*** the record displayed and ***click OK*** to generate a link.
- The now ***linked call*** has to be displayed ***in red.***

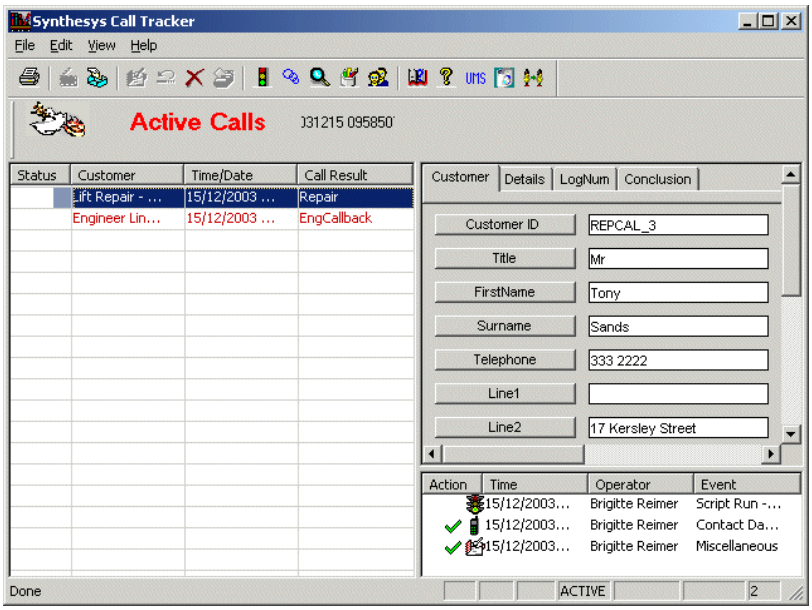
If more than one customer record is displayed, agents <u>must</u> select the relevant record from an ambiguity window, and then click ***OK*** to generate a link.



Follow up Control in the Call Tracker

In the Call Tracker details of the ‘Engineer Callback’ and ‘Repair Line’ calls can be viewed, using the **Link** icon on the Call Tracker toolbar.

- Locate and select one of the ‘Engineer Callback’ calls.
- Click the ***Link*** icon on the Call Tracker toolbar to display both, the ‘Engineer Callback’ and the associated ‘Repair Line’ call.
- Click on each call in turn, to view the associated call details.

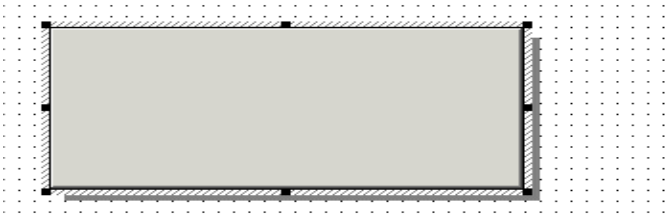


MACRO

The *Noetica Macro* control allows users to invoke client side macros. The Macro itself, a saved sequence of commands or keystrokes is written by the client to simplify tasks, for example the transfer of selected data to a target application.

Please take a look at the list of Virtual Key codes that work with the Noetica Macro control.

Appearance 

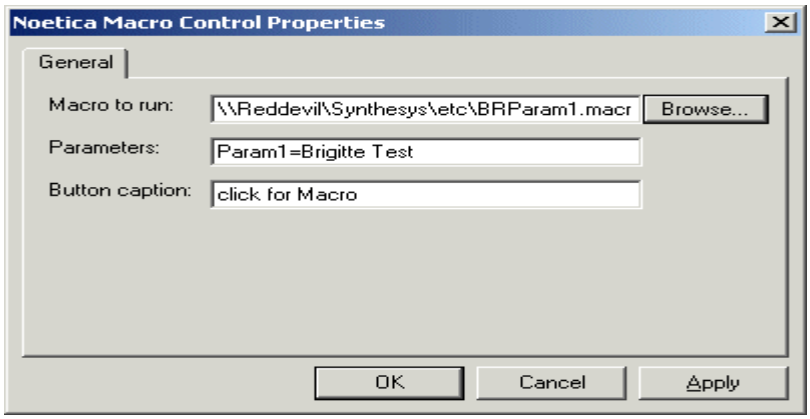


Properties

Right click on the control and open the *Properties* dialog.

- Locate and pick up the macro, using the ***Browse*** button, to display the path of the macro in the ***'Macro to run'*** field.

Usually the macro will be stored on a central server, rather than a local PC, to ensure that agents taking a call can access the macro. The path therefore will need to include the machine name: ***\\MachineName\ Folder Name\Filename.macro.***

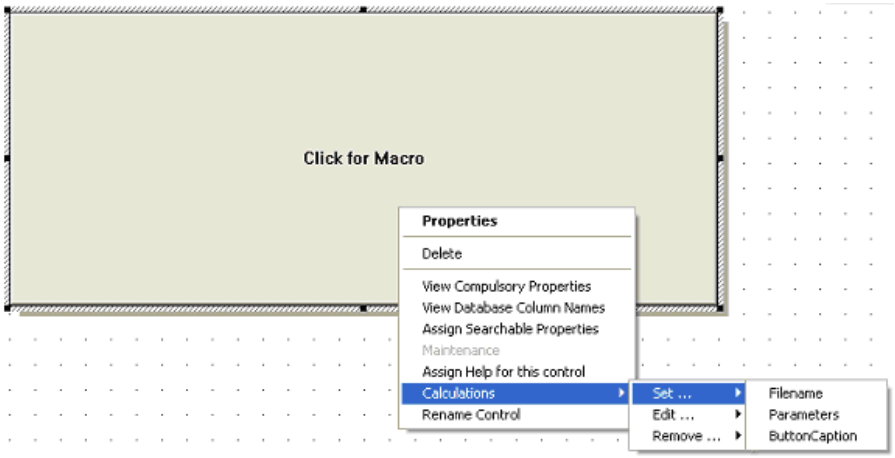


The Parameter name (as defined in the macro file) and value is entered into the ***Parameters*** field (Param1=XXX).

If multiple parameters are required, a *semi-colon* is used between parameters: ***ParameterName=ParameterValue;ParameterName=ParameterValue*** e.g. **CustomerID=1234;Screen=ABC1**

Setting up Calculations

Parameters can also be set by a calculation, to allow the use of dynamic parameters, for example, to set the parameter to be equal to Customer ID.



Calculations can be used to set the ***Filename,*** any or all of the ***Parameters*** and the text of the ***ButtonCaption***.

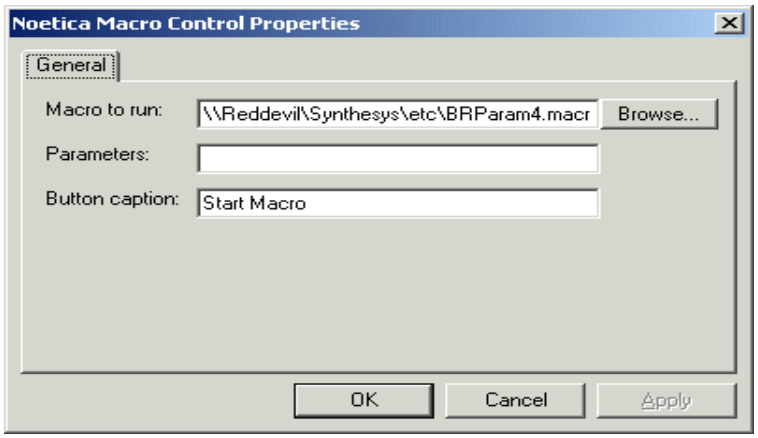
A calculation to set a parameter for the CustomerID would look somewhat like this:

Calculation ParametersCalc()

ParametersCalc = "Param1="&[CustomerDetails.Customer ID]

End Calculation

If the parameter is set using a calculation, the Parameter field in the Macro control is left blank.



List of Virtual Key codes that work with Macro control

When creating the Macro file instructions, clients should be aware that there are a limited number of Virtual Key codes that can be used with the Noetica Macro control:

Symbolic Constant Name	Value (hexadecimal)	Keyboard (or Mouse) equivalent
VK_RETURN	0D	ENTER key
VK_ESCAPE	1B	ESC key
VK_F1	70	F1 key
VK_F2	71	F2 key
VK_F3	72	F3 key
VK_F4	73	F4 key
VK_F5	74	F5 key
VK_F6	75	F6 key
VK_F7	76	F7 key
VK_F8	77	F8 key
VK_F9	78	F9 key
VK_F10	79	F10 key
VK_F11	7A	F11 key
VK_F12	7B	F12 key
VK_SCROLL	91	SCROLL LOCK key
VK_BACK	08	BACKSPACE key
VK_SPACE	20	SPACEBAR
VK_PRIOR	21	PAGE UP key
VK_NEXT	22	PAGE DOWN key
VK_HOME	24	HOME key
VK_END	23	END key
VK_UP	26	UP ARROW key
VK_DOWN	28	DOWN ARROW key
VK_LEFT	25	LEFT ARROW key
VK_RIGHT	27	RIGHT ARROW key

Macro Example

```
Param CustomerID
FindWindow "Untitled - Notepad"
Press "VK_HOME"
Type CustomerID
Press "VK_RETURN"
```

Param CustomerID	declares an expected parameter for this macro. Also specifies parameter's name, in this case we are passing the CustomerID.
FindWindow window	finds an application with name declared by the window variable in our example we are looking for an open application of notepad the title of which would be "Untitled - Notepad"
Press "VK_HOME"	this function will set the cursor position to the top of the notepad application
Type CustomerID	simulates keyboard input, typing specified string, in this instance it types a CustomerID into notepad. If this argument is enclosed in quotation marks, the following escape sequences are recognized and replaced \n - newline, \t - tab character, \" - will be replaced with quotation mark, \\ - will be replaced with single backslash
Press "VK_RETURN"	simulates keyboard input, pressing one specified key. Should be used for difficult keys, in this case we are simulating a carriage return

— So taking this further a macro consisting of:

```
Param CustomerID
Param Firstname
Param Surname
Param Telephone
FindWindow "Untitled - Notepad"
Press "VK_HOME"
Type CustomerID
Press "VK_RETURN"
Type Firstname
Press "VK_RETURN"
Type Surname
Press "VK_RETURN"
Type Telephone
Press "VK_RETURN"
```

— would produce a notepad output of:

```
ID1234
Peter
Smith
0207111111
```

The calculation that needs to be set up for a macro that contains multiple parameters should look something like this, but ensuring the calculation is displayed all on one line:

```
Calculation BRTRN()

BRTRN="CustomerID="&[CustomerDetails.Customer
ID]&";Firstname="&[CustomerDetails.Firstname]&";Surname="&[CustomerDetails.Surname]&
";Telephone="&[CustomerDetails.Telephone]

End Calculation
```

General Use when Taking Calls

To run the Macro, for example to transfer selected information to a target application:

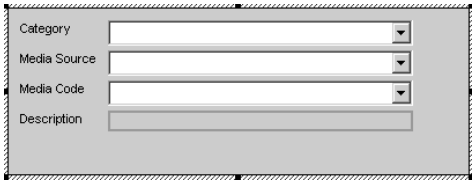
- Agents click on the button displayed. The name of the button will reflect the task in hand.

The data transferred could, for example, be a specific CustomerID, used to bring up a customer's insurance details from within the target application.

MEDIA

The *Noetica Media* control allows the capture of a media source code and display of media sources together with related information.

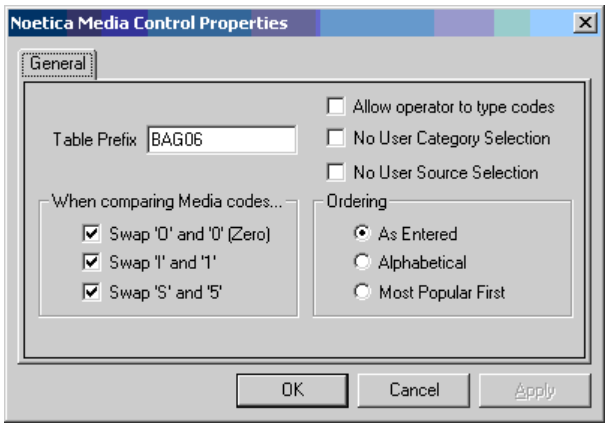
Appearance



Properties

Right click on the control and open the *Properties* dialog.

The Table Prefix field will automatically contain your Account Prefix and Campaign ID but you can enter a new Prefix, if required.

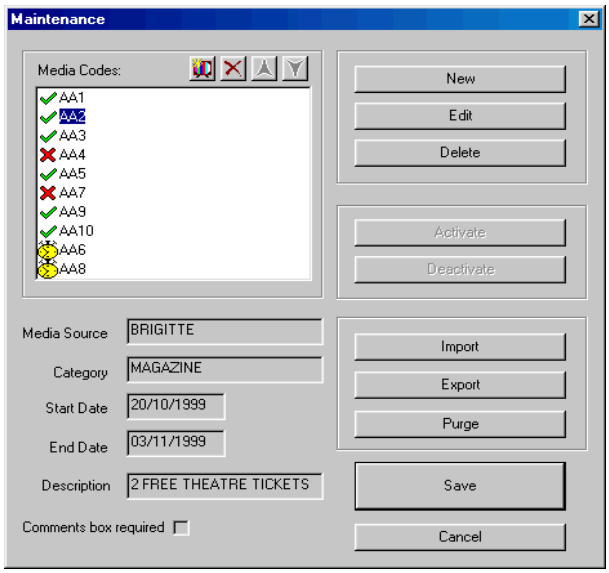


Option	Used To
Swap 'O' and 0	Accept entries of either the letter 'O' or Zero
Swap 'I' and 1	The letter 'I' or the number one are interchangeable
Swap 'S' and 5	The letter 'S' or the number 5 are interchangeable
As Entered	Display all information as entered in Maintenance
Alphabetical	Display the information in alphabetical order A-Z
Most Popular First	Places the media code used most often to the top of the list
Allow operator to type codes	Allows agents to enter media codes
No User Category Selection	Disable the Category Selection field
No User Source Selection	Disable the Source Selection field

Maintenance

Right click on the *Media* control and select ***Maintenance***.

- Using the appropriate buttons in the Maintenance window you can add new information and edit or delete existing information.
- To commit the information entered to the database you must click the **Save** button.




New. Use this icon or the New button to add new media codes and details.


Delete. Use this icon or the Delete button to delete the media code and associated Information.


Up and **Down**. Allows you to move a media code up or down to the desired position.


Green tick shows Active media codes.


Timer shows Media codes not yet active, with starting date set in future.


Red cross shows date of code has expired.

Activate / Deactivate buttons: Manually activate/ deactivate the media code. This option is only available if no specific start/ end date has been entered for the media code.

Import / Export: To import existing media codes from a csv file and to export existing media codes and information as a csv file.

Purge: Delete all expired media codes up to a specified date.

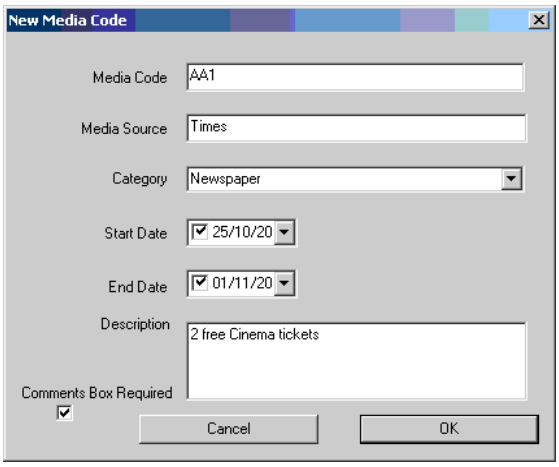
Save: To commit the information entered to the database you must click the **Save** button.

Cancel: To exit the maintenance window without saving the recent changes.

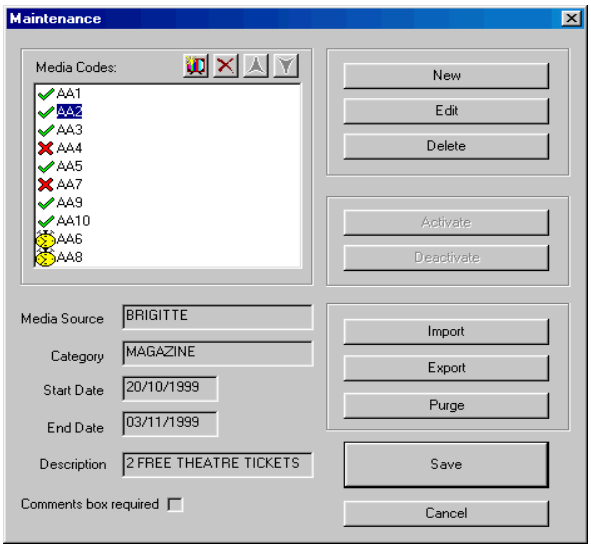
ADDING NEW INFORMATION

To add media code & source, publication dates and information as required:

- Click the ***New*** button or the Add New icon.
- Enter all details about your ***Media Code, Media Source, Category*** and ***Description*** into the relevant fields of the *New Media Code* dialog.
- Select the ***Dates*** during which the media codes should be activated
- Tick the ***Comments*** box if you want to enable agents to add comments required.
- Click ***OK*** to save the entries and to return to the ***Maintenance*** page.



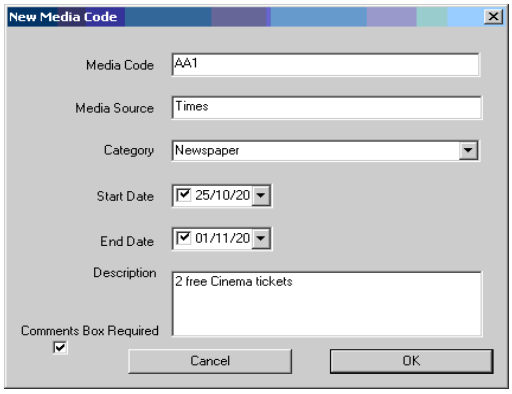
- To add the information to the database, you <u>must</u> click the Save button.
- To exit the ***Maintenance*** page without saving your changes, click ***Cancel***.



Editing existing Media Codes and Information

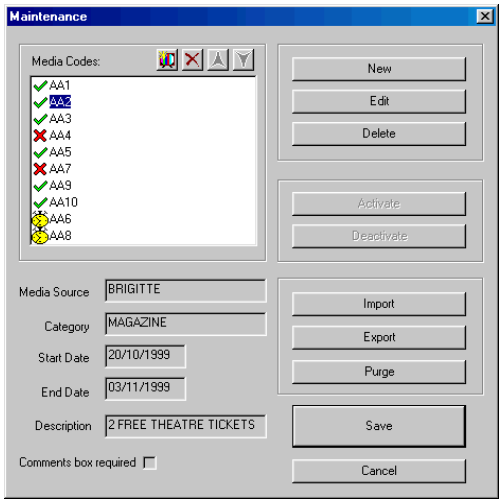
To edit Media Codes and Information:

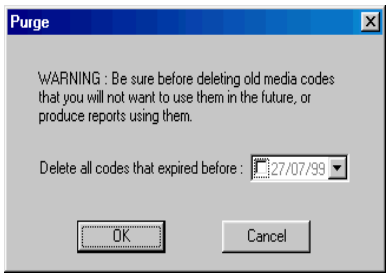
- Click the Edit button in the Media ***Maintenance*** dialog.
- In the Edit Media Code window put your cursor into the desired field and make any changes, as required, and then click OK.
- Remember to also click the ***Save*** button in the ***Maintenance*** dialog of the Media control, to save your changes made to the database.



Deleting existing Media Codes

- To ***delete individual media codes*** select the appropriate code in the *Media Codes* field and then click the Delete button.
- To ***delete a range of expired media*** **codes** or ***all your expired media codes***, up to a particular date click the Purge button.
- In the ***Purge*** window, select the required date from the diary page, opening the drop down menu, and then click OK.





IMPORTING & EXPORTING EXISTING MEDIA CODES

When importing media codes from a csv file, ensure that the fields in the csv file include MediaCode, MediaSource, Category, StartDate, FinishDate, Active (with entry of either Y or N), Description and Commets box.

Before you import a file, it is advisable that you enter a record into your media control and export this to check the format required for the import.

To export existing media codes:

- Click the ***Export*** button in the Media ***Maintenance*** dialog to export existing media codes and information as a csv file.

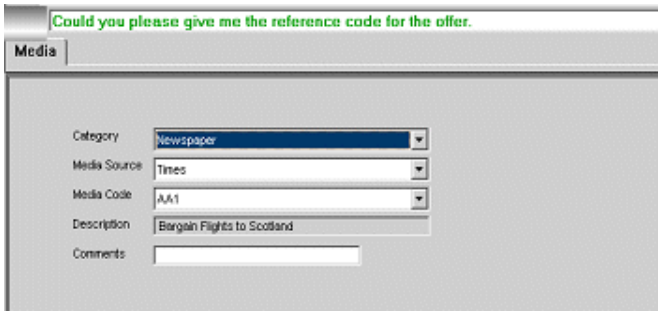
To import existing media codes from a csv file.

- Click ***the Import*** button in the Media ***Maintenance*** dialog and locate the csv file that you wish to import.

General Use when Taking Calls

- Agents will use the mouse to select a relevant ***Media Code, Media Source*** or ***Category*** from the drop down menu.
- If the Comments field is enabled, any comments can be entered, as required.

Agents can use the arrow keys on the keyboard to scroll through the information provided. The Tab keys will move you from one field to the next.



- If more than one media code is displayed for a selected Media source, the ***Please confirm Code/Date..*** window will open.
- Select the required media code from the list and click OK to display it in the Media control.

MEMO

The *Noetica Memo* control allows the entry of large amounts of text, as it uses a memo field in the database, rather than a text field.

Information in the Memo Control can be displayed to the agent as 'Read only', in text or HTML format.

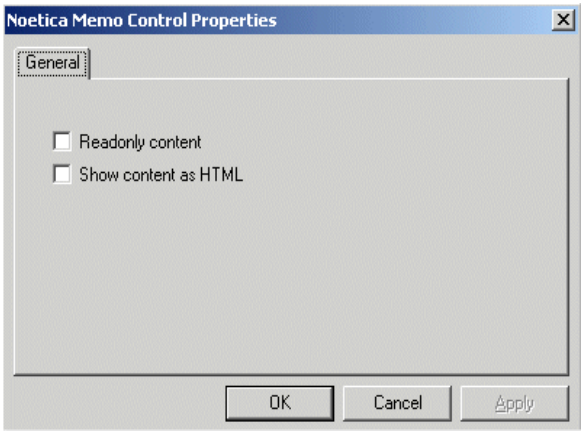
Appearance

Properties

Right click on the control and open the *Properties* dialog, you can select:

Read only content	This option does not allow agents to add information when taking calls. Tick, if you want to display, for example, a summary of call information taken, using a calculation.
Show content as HTML	Tick to display the content as in HTML format. Again, this option does not allow agents to add information themselves when taking a call.

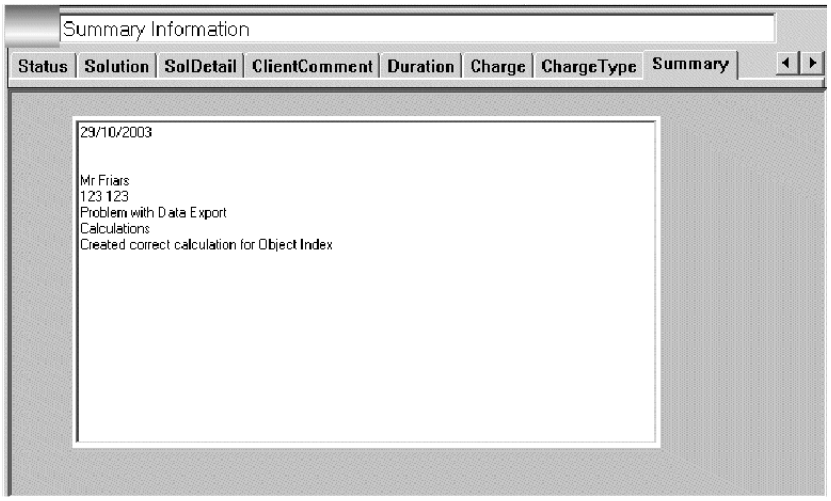
If none of the available options is ticked, agents can enter a text when taking calls.



General Use when Taking Calls

In our example, the *Memo* control displays a summary of information taken during the call. This information can be used to email a confirmation letter to the customer.

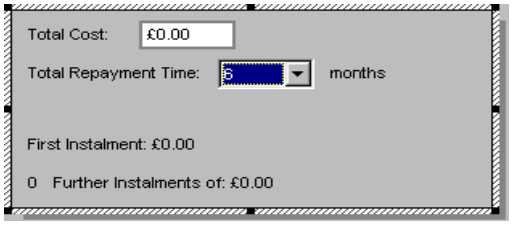
If editing is enabled, agents can add any relevant information, as required.



MONTHLY PAYMENT

The *Noetica Monthly Payment* control enables the calculation of repayments in instalments, taking into consideration the total cost, a minimum first instalment and the time over which the payments will be made.

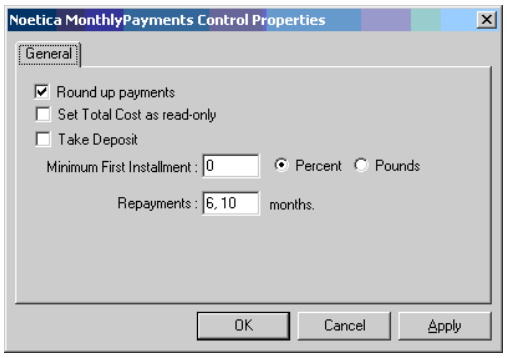
Appearance

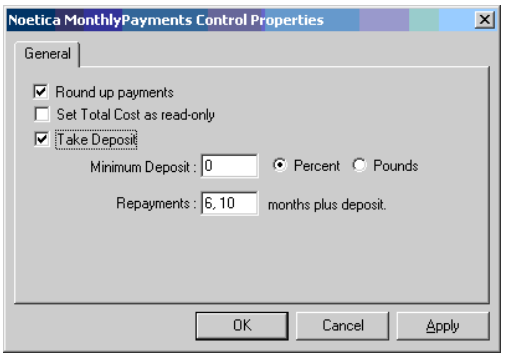


Properties

Right click on the control and open the *Properties* dialog. Placing a tick in the appropriate boxes, you can set the control to:

- *Round up payments* to the nearest pound
- Set the Total Cost field as read-only
- Take Deposit
- Specify *Minimum First Instalments* or *Minimum First Deposit in* 'Percent' or 'Pounds'.
- Set *Repayment* periods in month, separated by a comma (i.e. 6, 8,10)





If ***Take Deposit*** is ticked, the control will display ***Minimum Deposit,*** instead of *Minimum First Instalment* and calculate payments accordingly.

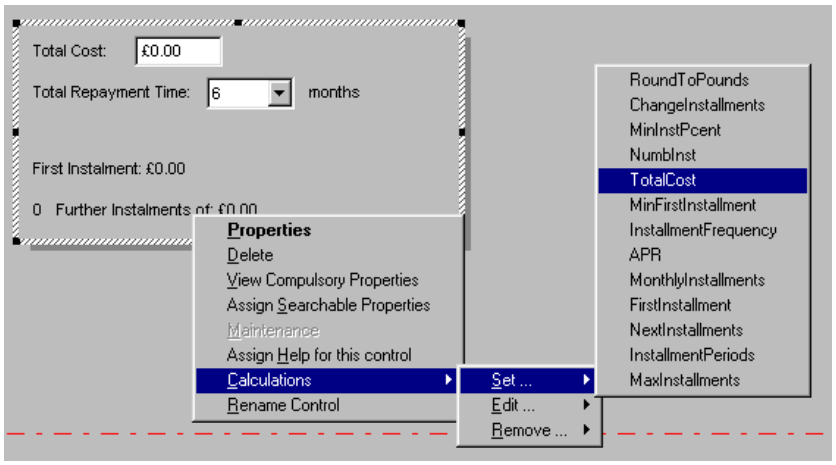
If the ***Roundup Payment*** field is ticked, the outstanding instalments are calculated using the rounded up figure and payments due will be displayed in full pounds.

Using Calculations for Displaying the Total Cost

To automatically display the *Total Cost* when agents reach the *Monthly Payment* control, you can set a calculation:

- Right click on the control and select ***Calculations*** from the drop down menu.

Next select ***Set,*** then ***TotalCost*** from the respective drop down menus.



General use when Taking Calls

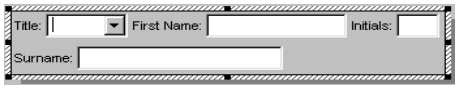
To pass on the relevant repayment details to the customer when taking calls, agents simply select a customer's preferred repayment period from the drop down menu.

The amount of the first instalment or deposit and subsequent instalments due will be calculated and displayed accordingly.

NAME

The Noetica Name Control allows the capture of a caller's title, initials, first name, surname and honours.

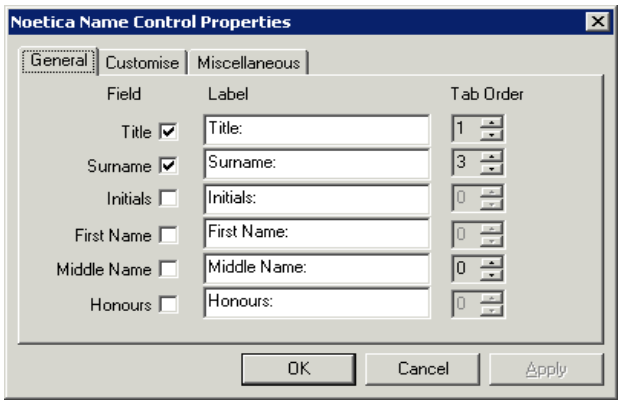
Appearance



Property Page

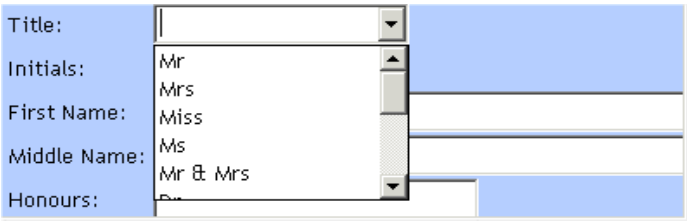
Right click on the control and open the *Properties* dialog, where you can configure the control.

General	Where you select the ***Field Properties*** and ***Labels*** that the control will display and the ***Tab Order*** in which they appear.
Customize	Where you ***add, edit*** and ***delete*** the ***titles*** displayed in the Title drop down menu.
Miscellaneous	To enable ***capitalisation of the first letter*** of words entered in lower case and set the ***width*** of the control.



General use when Taking Calls

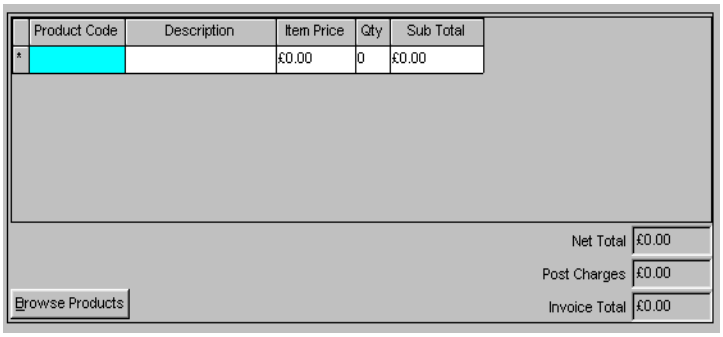
Agents, when taking call, can select a title from the drop down menu and then enter the rest of the name details, as required, into the fields displayed.



ORDER

The Noetica Order control allows the taking of orders including discount schemes, postage and packing costs and other features. Lists of products and prices are used from the database.

Appearance



Properties

Right click on the control and open the *Properties* dialog.

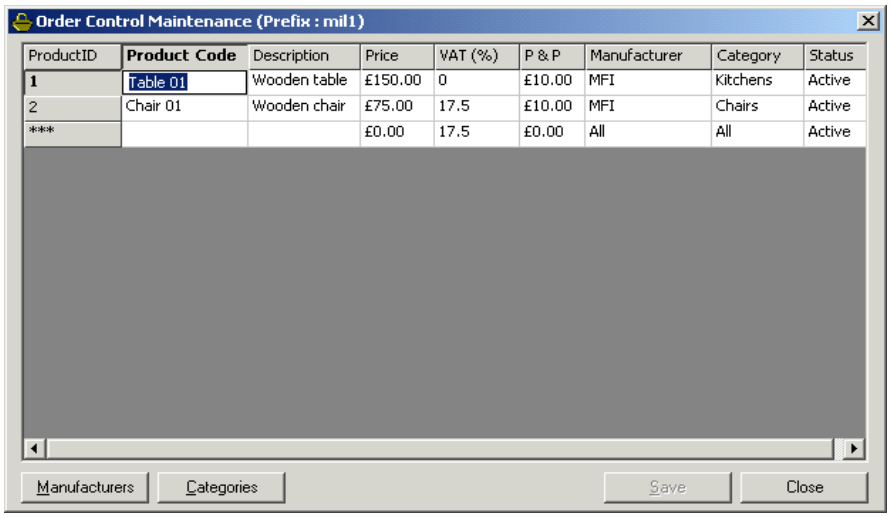
- First, enter a ***Prefix*** or short descriptive name in the Prefix/Name field and the ***Currency Symbol***.
- Next, you can tick any of the other properties as required. In our example we have ticked *Use Product Code*, *Use VAT* and to calculate *Postage and Packaging* per order.
- We have also selected the *Categories Available* and *Manufacturers Available,* to filter and speed up the search for requested products.

If the *Discounts Available* option is ticked, enter the allowable ***Maximum*** discount that agents are able to offer customers, when taking calls.

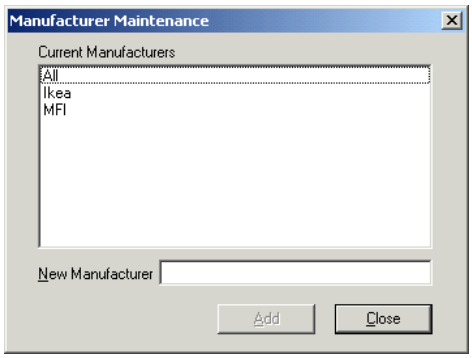
Maintenance

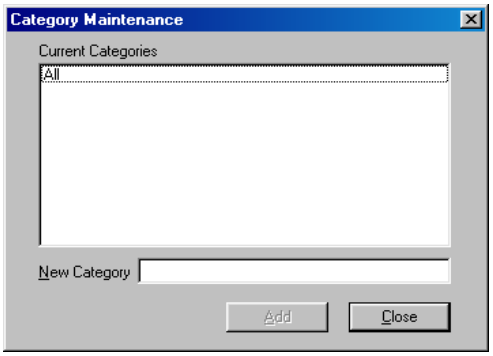
To add product items:

- Right click on the *Order* control and select *Maintenance* to display the *Order Control Maintenance* table.
- To enter the product code, description and price, click your mouse pointer into the relevant fields and type in the required information.



- Click the ***Manufacturer*** button, and in the *Manufacturers Maintenance* dialog, enter your manufacture into the ***New Manufacturers*** field. Click ***Add*** to display your entry in the *Current Manufacturers* page.
- Click the ***Categories*** button, and in the Categories *Maintenance* dialog, enter your category in the ***New Category*** field. Click ***Add*** to display your entry in the *Current categories* page.
- Click close to return to the *Order Control Maintenance* table.



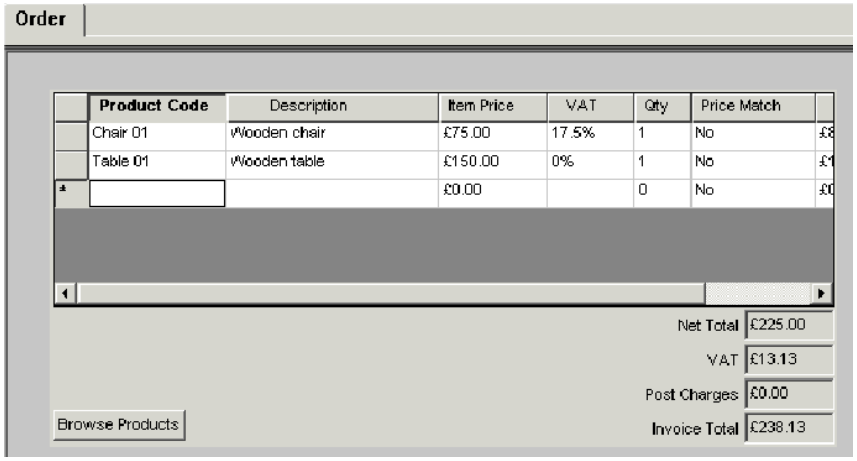


Back in the *Order* control *Maintenance* table, click ***Save*** to confirm your entries, and then Close.

General use when Taking Calls

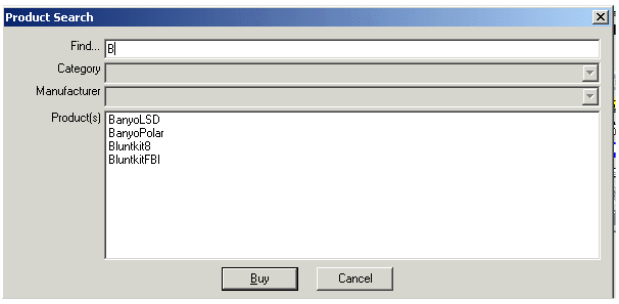
The order control in our example has been set up for a furniture store. If the caller knows the correct product code:

- Agents simply type the ***product code*** into the ***Product column*** to display the product and all relevant details, including a description and the price.
- To change the quantity of items, agents click on the ***Qty*** cell and enter the required number of items. *Sub Totals* and *Invoice Total* will be adjusted automatically.
- To delete a selected product, agents click into the left-hand square to highlight the complete row and then press ***Delete*** on the keyboard.



If the product code is not known:

- Agents click the ***Browse Product*** button to open the ***Product Search*** window.
- The ***Find, Category*** and ***Manufacturer*** fields, if enabled, help with the product search.
- Agents select the required items from the list and click the ***Buy*** button, to add the selected product to the order form, including the product code, description and item price and to update the Invoice Total.

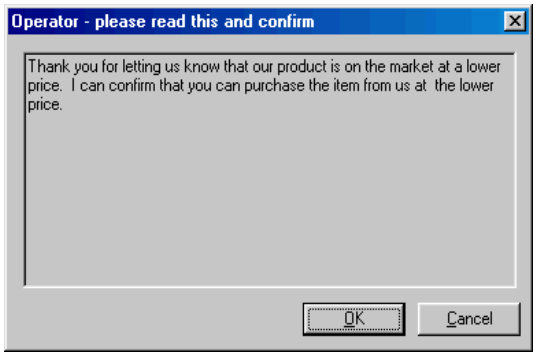


Discount and Price Match

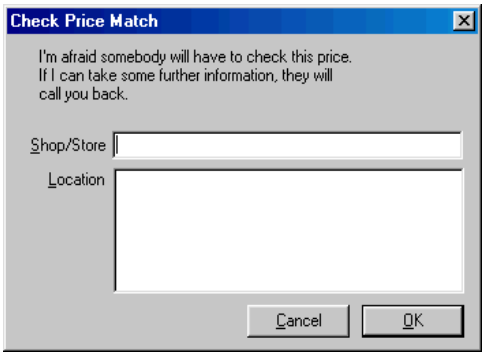
If the Discount and Price Match options are enabled and a customer asks for a reduction, as he or she has seen the product at a lower price at another store:

- Agents click into the ***Discount*** or ***Price Match*** field for the relevant product to open the *Discount* or *Price Match* window.
- They then ***enter the discount*** (maximum % discount available should form part of the agent dialogue), ***or the selling price*** of a single product at the other store and click OK.

- If the price or discount entered is acceptable, the message displayed will confirm that the product can be sold to the customer at the reduced price.
- If the price or discount mentioned is not acceptable, the message displayed will say that a price check needs to be carried out, before the item can be reduced.



Price Match confirmed



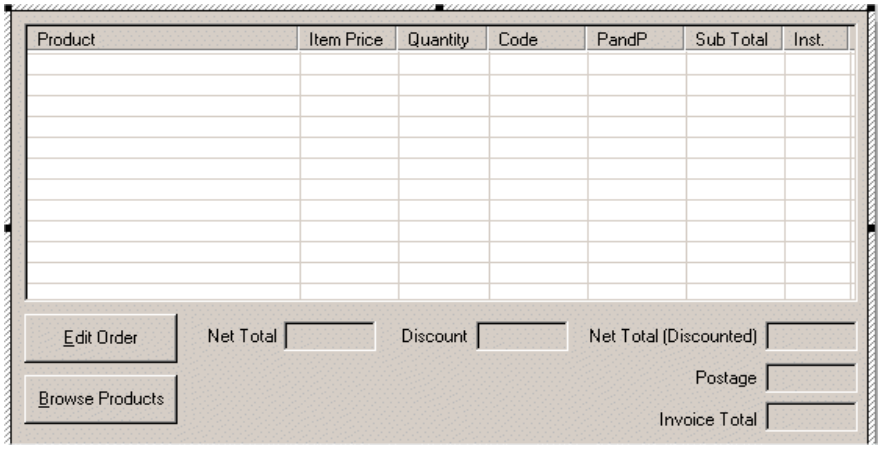
Price check needed

When a price reduction is confirmed, the amount in the order control will adjust accordingly and display the lower price as the amount due.

SPECIAL ORDER

The Noetica Ans*Order* control allows the taking of orders including up sell schemes & special offers, postage and packing costs and other features. Lists of products and prices are used from the database.

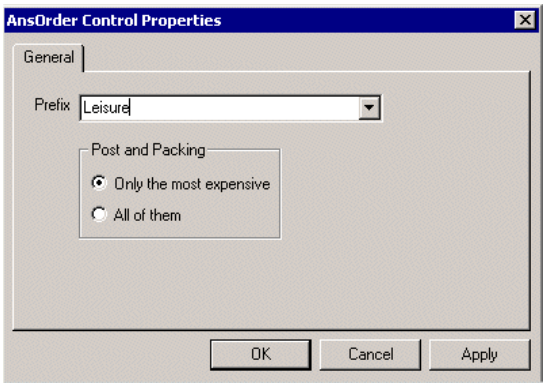
Appearance 



Properties

Right click on the control and open the *Properties* dialog.

- Enter a ***Prefix*** or a short descriptive name into the Prefix field.
- Under the Post and Packing heading, tick ***Only the most expensive***, if only the highest post & packing cost is to be charged or ***All of them***, to charge post & packing for each item.

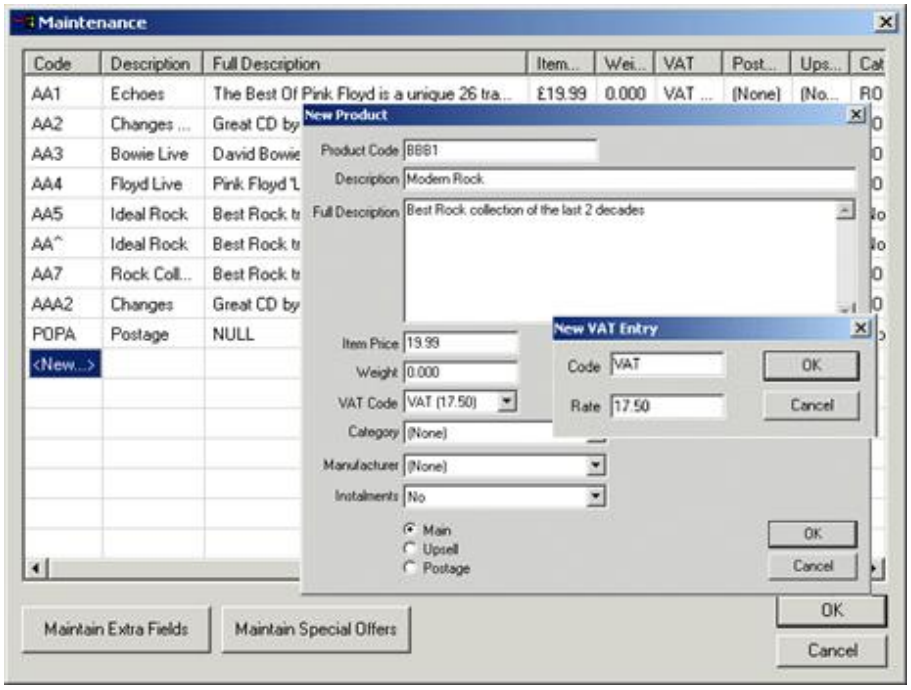


- Click ***OK*** to return you to the order control. For a new Prefix, click ***Yes*** to confirm that you want to create the database tables for the new prefix.

Maintenance

Product details for the *Special Order* control are entered in the control's *Maintenance* page.

- Right click on the *Special Order* control and select *Maintenance* to display the *order control maintenance* table.
- Click your left mouse button on ***<New..>*** in the Code field, to open the ***New Product*** window, where you enter product code and product details.
- To enter ***VAT***, a ***Category*** and ***Manufacturer***, click on the respective drop down menus.

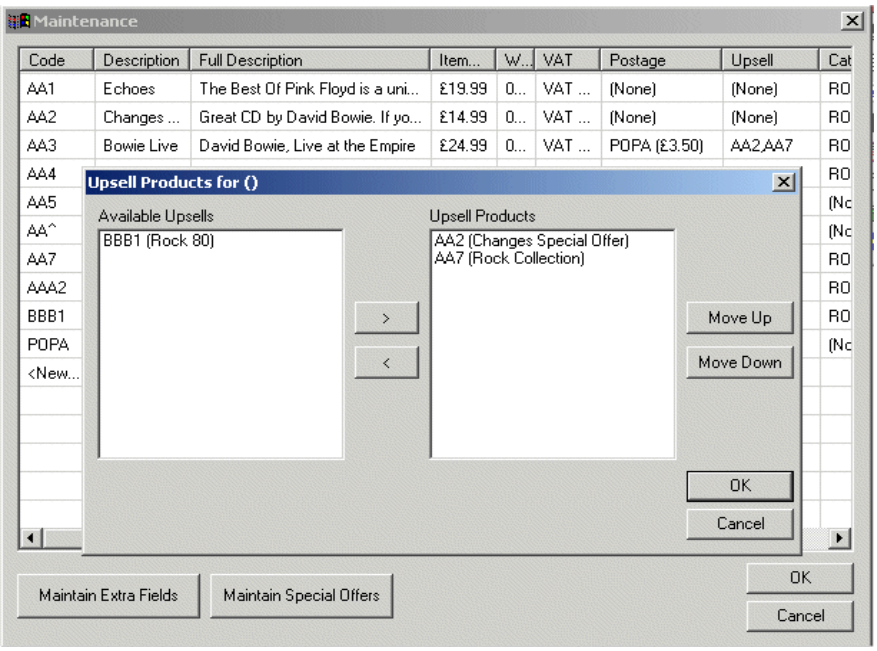


New VAT Entry	Enter the new VAT details (Code and Rate) in the New VAT Entry window. Click Ok to display your entry in the *VAT Code* field.
New Category	Enter the new Category in the *New* Category window. Click Ok to display your entry in the *Category* field.
New Manufacturer	Enter the manufacturer in the *New Manufactures* window. Click Ok to display your entry in the *Manufacturer* field.
Instalments	To enter Instalment details, click on the *Instalments* drop down menu, select 'Yes' and enter the number of instalments and the amount payable in the window displayed.
Main	Tick 'Main', to show the products entered in the main product table
Up sell	Tick 'Up sell' if the product entered is to be used for Up sell offers
Postage	Tick 'Postage' if the details entered refer to postage and packing

Up sell OFFERS

To assign the Up sell products:

- Locate the product that attracts the up sell offer(s) in the order maintenance table.
- Click the left mouse button into the corresponding Upsell column and select the required product(s) from the 'Available Upsells' section, in the 'Upsell Products for ()' dialog now displayed.
- Use the > button, to move desired product(s) from the 'Available Upsells' to 'Upsell Products' section. You can assign up to 10 Upsell products.
- To remove products from the 'Upsell Products' section, use the < button.



- Using the ***Move Up*** & ***Move Down*** buttons, you can move selected products to the top or bottom of the list, the order, in which *Upsell Products* are displayed in the *Product Purchase* dialog when taking calls.

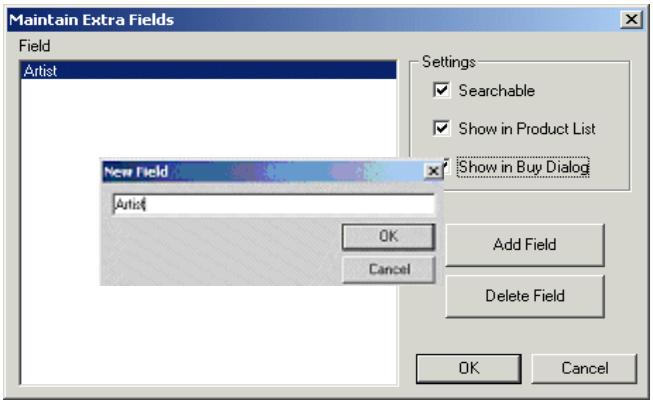
To assign Postage and Packing cost:

- Locate the product that attracts the postage cost in the order maintenance table.
- Click the left mouse button into the corresponding ***Postage*** column and select the associated postage and packing cost from the drop down menu.

Maintain Extra Fields

If required, additional fields can be added to your order maintenance table, using the *Maintain Extra Fields* button:

- In the *Maintain Extra Fields* dialog subsequently displayed, click ***Add Field***; enter the new field name, then click OK.
- To delete an existing field, select the name displayed in the Field section and click the ***Delete Field*** button.



Fields Settings

New fields can be set to ***Searchable, Show in Product List or Show in Buy Dialog*** to determine, where the extra field information is displayed in the Browse Product Dialog when taking calls.

Any combination (including none) of these settings is possible.

Option	**Appearance in the Browse Product Dialog in Take Calls:**
Searchable	A drop-down menu for the new field name, i.e. Artist, will be created below the Manufacturer button, to assist operators in their search for required products.
Show in Product List	The Extra Field value will be shown in brackets after the Product Name in the Products lists, i.e. Echoes (Pink Floyd).
Show in Buy Dialog	The Extra Field value and Extra Field name will be shown in the Buy Dialog i.e.: Echoes: Price £19.99 Artist : Pink Floyd

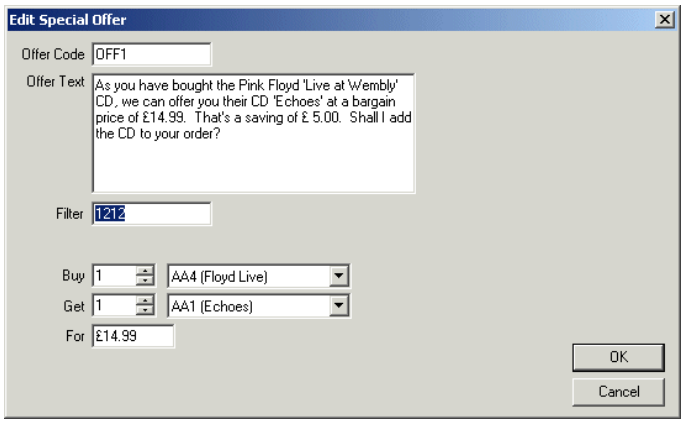
Click OK, to return to the o*rder maintenance* table.

MAINTAINING SPECIAL OFFERS

If you wish to use the *Special Offer Types* option:

- Click the ***Maintain Special Offers*** button in your Order maintenance table, to open the *Maintain Special Offers dialog.*
- To edit an existing offer, click ***Edit Special Offer.***
- Click ***New Special Offer*** and select the type of offer that you wish to create into the select the ***Special Offer Type*** dialog.

- Enter the details, including *Offer Code and* a descriptive text and select other relevant information, i.e. *Buy and Get* and associated products.



You can leave the Filter field empty, or set with a filter and a calculation:

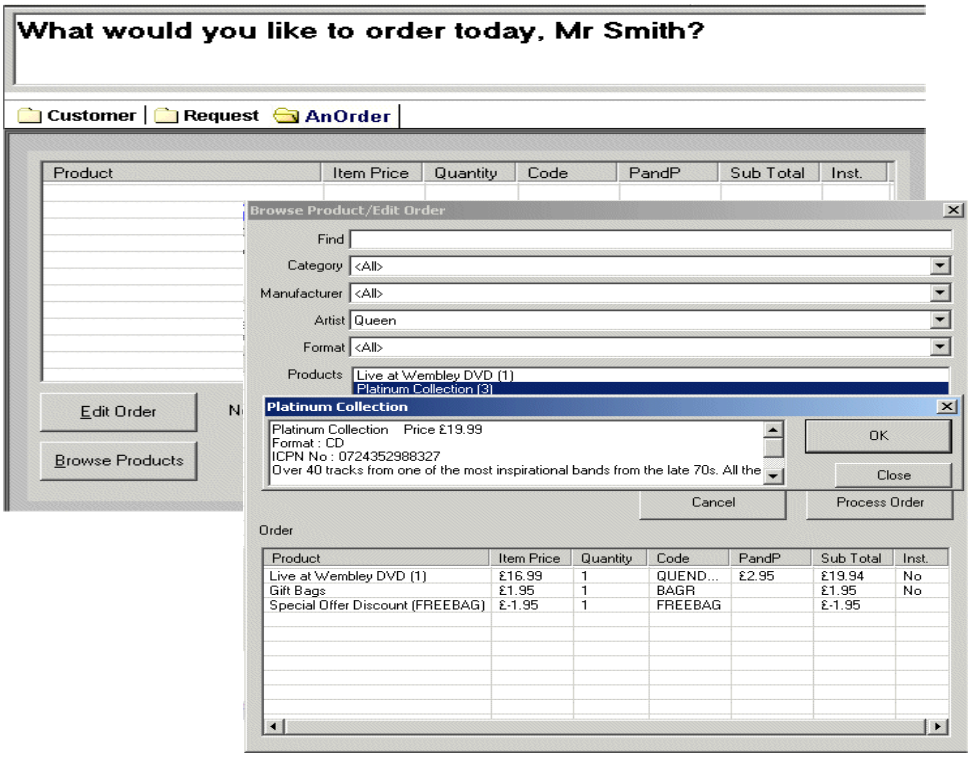
- For example, to display only offers associated with selected DDI numbers, right click on the Order control and select (**Calculations – Set – OfferFilter),** and set a calculation based on the *System.DDI*
- Enter the DDI number that attracts the special offer into the Filter field.

General use when Taking Calls

To process an order:

- Agents click the **Browse Products** button to open the Browse *Product/ Edit Order* window, to show a list of available products. The ***Find, Category*** and ***Manufacturer*** fields, if enabled, help with the product search.
- Next, they double click on the product that the customer wishes to purchase and ***OK*** in the product detail window, to add the item to the order form.

The selected products will be displayed in the Order section, including the product code, description and item price. The Invoice Total will be updated accordingly.

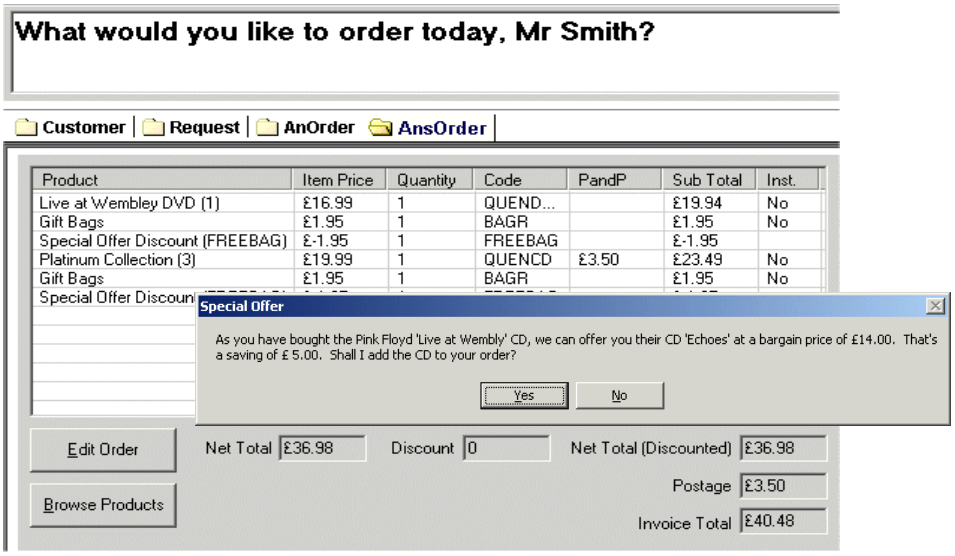


- To close the product details window without adding the selected item to the order form, click the ***Close*** button.
- To cancel the action, without adding any of the selected products to the order, click the ***Cancel*** button.
- To process your order and to return to the Order control main screen, click the ***Process Order*** button.

Editing an Existing Order

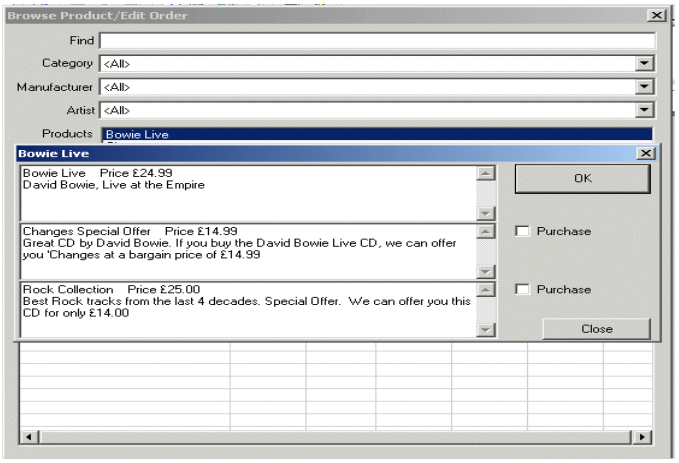
All selected ordered items are displayed in the Order section. To edit an order:

- Agents click the ***Edit Order*** button to access the Browse *Product/ Edit Order* window.
- To ***change the quantity*** of items selected, agents click on the ***Quantity*** cell and enter the required number of items. *Sub Totals* and *Invoice Total* will be adjusted automatically.
- To ***delete a selected product***, agents click into the ***Quantity*** field for that product, type in cero (0), and then click Enter on the keyboard.



A message will alert agents about any ***up sell products*** and ***special offers*** connected to a selected product. If the customer wishes to buy any of these:

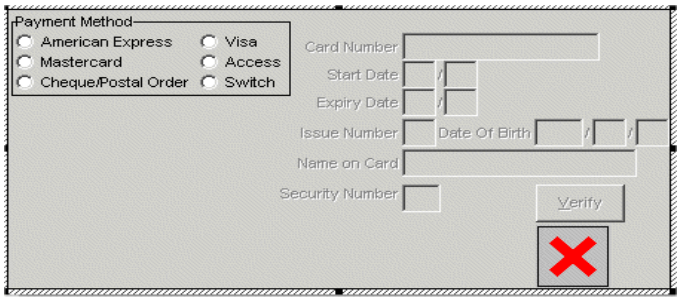
- Ticks the corresponding ***Purchase*** check box to add the up sell product to the order form and to adjust the Sub Totals and Invoice Total.



PAYMENT

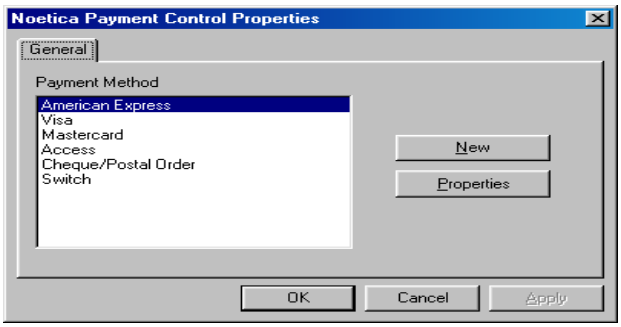
The Noetica Payment control allows you to specify various methods of payment and their related details, such as card number, expiry date etc.

Appearance

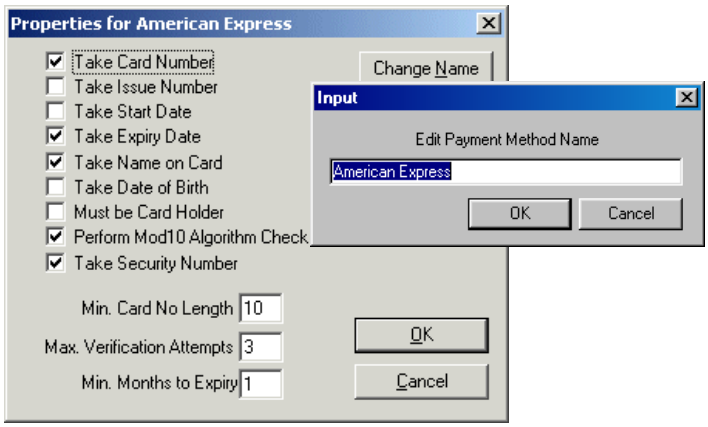


Property Page

- Right click on the control and open the *Properties* dialog.
- To add new payment methods, click the ***New*** button.



- Click the ***Properties*** button to open the '*Set Properties for*…window, tick any of the available options as required and set the card length, verification attempts and expiry period for the various credit cards.
- Click the ***Change Name*** button to change the name of a payment method.



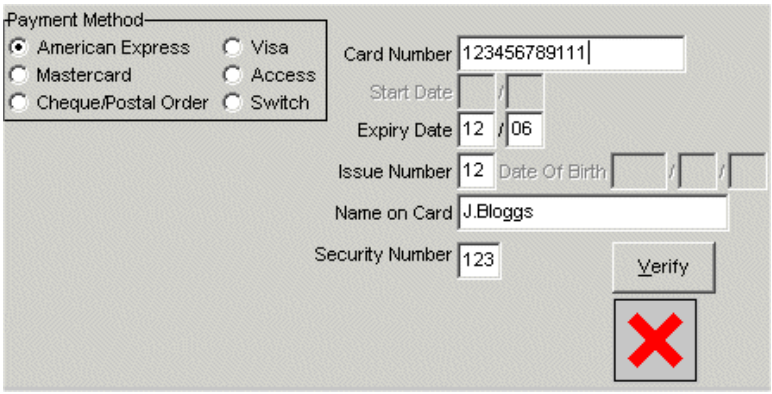
General Use when Taking Calls

When taking calls, agents select the credit card that the caller wishes to use. All fields that need to be completed before the card can be validated will be activated.

- Agents enter the number for the selected card and complete all enabled fields, to activate the *Verify* button.
- Having confirmed the details entered with the customer, agents need to press the ***Verify*** button to confirm the method of payment.

Pressing ***Enter*** on the keyboard or using the Tab keys ⟵ ⟶ will enable agents to move to the next fields.

Shift ⇑ and Tab enables agents to move back through the fields in case you need to make any changes.



If the card has been cleared, the red cross will change to a ***green tick***.

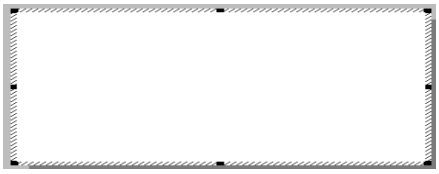
If the card details have not been accepted an error message will be displayed:

- Agents will have to check the card details with the caller.
- If the card can't be verified, they have to ask the caller for another credit card or another method of payment altogether.

PICTURE

Using the *Noetica PictureX* control, JPEG, GIF, or PNG pictures can be displayed in a screen, together with other controls.

Appearance 

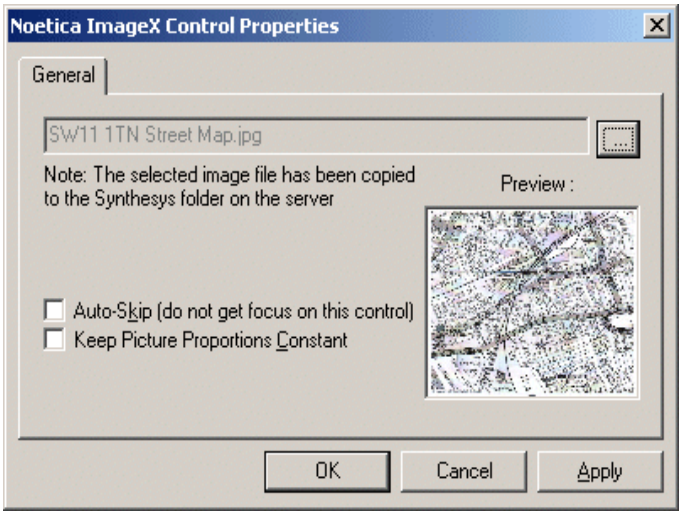


Properties

Right click on the control and open the *Properties* dialog, where you can load the picture file:

- Click the Browse button marked "…" on the right of the *Image File* field and locate the picture file in the "Open" dialog window.

When the picture file is selected, the image appears in the preview window.

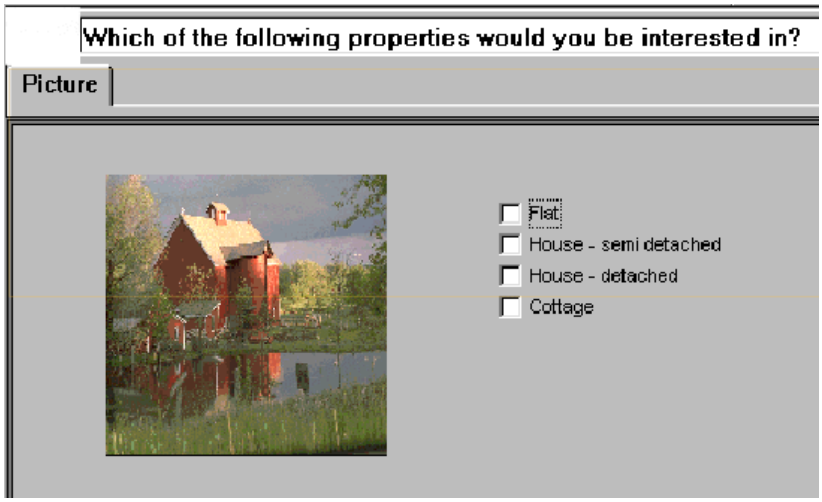


- Tick **Auto-Skip** to ensure that the focus is sent immediately to another control within the section, without operator intervention.
- Tick **Keep Picture Proportions Constant** to ensure that the Image retains its proportions when resized.

General Use when Taking Calls

If ***auto-skip*** has been enabled when configuring the *PictureX* control, a picture will be displayed together another with another control.

- If the auto-skip has not been enabled, agents will initially only see the picture.
- The next control will be displayed, as soon as agents press *Enter* on the keyboard, or the *Next Question* icon.



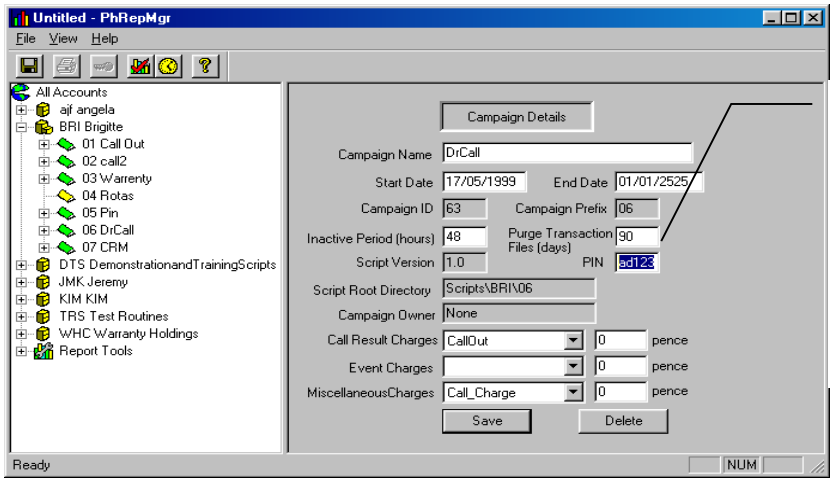
PIN

The *Noetica PIN* control is used for entry of personal identification numbers. In the Campaign Manager the *Pin* control can be linked to a particular campaign to filter out and display only details of active calls for the selected campaign in the Call Tracker.

Appearance 

Adding a Pin Number to a selected Campaign

- In the Campaign Manager, select the campaign to be used and enter the Pin Number that, for example your doctors or engineers will use, when phoning back on a collect line.



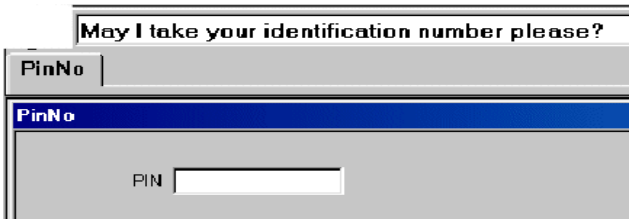
The campaign selected in our example is 'DrCall'.

In the ***PIN*** field we have entered the Pin Number 'ad123'

General Use when Taking Calls

When agents reach the section with the Pin control, they enter the doctor's or engineer's *Pin Number.*

When the call is completed, only the messages associated with the pin are displayed in ***Call Tracker***.



POP WATCH

The *Noetica Pop Watch* control enables incoming emails to be inserted into the Call Tracker as a new call, based on the callflow that contains the Pop Watch control. The Emails are then picked up and dealt with in the callflow. An automatic reply confirming the receipt of the email can be sent to the customer via a report.

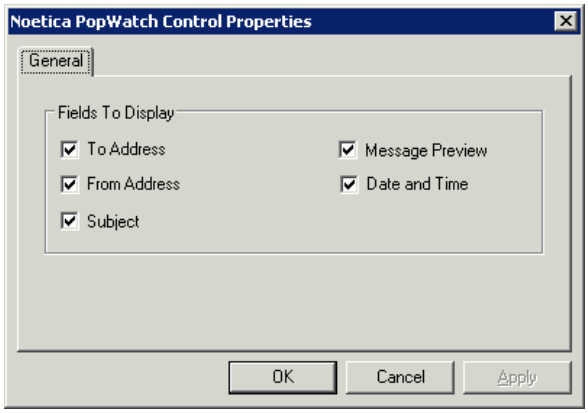
A separate email account needs to be set up for each callflow/ campaign, in which the Pop Watch control is used.

Appearance

Resize the Pop Watch control to display all details, including the 'Reply' and 'Open' buttons.

Properties

Right click on the control and open the *Properties* dialog.



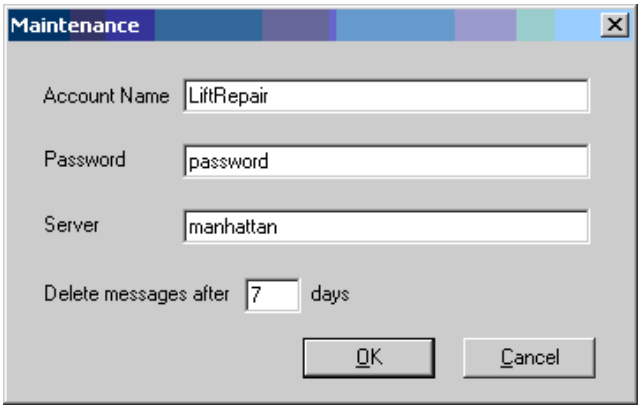
Ensure that all the fields that you wish the control to display are ticked.

To Address	Display the email address of the recipient
From Address	Show the email address of the sender
Subject	Heading referring to the subject matter of the email
Message Preview	Window showing a preview of the email message.
Date and Time	Date and time of the email arriving on the email server

Maintenance

In the *Maintenance* window of the control:

- Enter the **account name**, the **password** to access your email account and the **name of your email server**.
- In the ***Delete messages after*** field you can specify the number of days (minimum is 7 days) after which your emails will be removed from the email server.



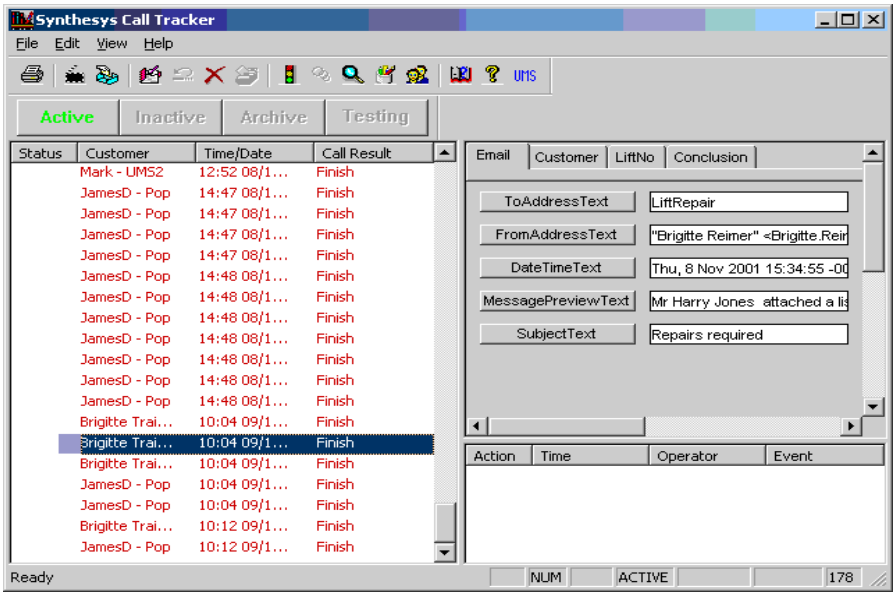
Call Status

The Call Status has to be set to ***Active*** in the Conclusion flag in the Callflow Editor, in order for the Email to be displayed as an active call in the Call Tracker.

General Use when Taking Calls

Incoming emails will be displayed in the *Call Tracker* as active calls, requiring action.

- Open the *Synthesys Call Tracker* by clicking on the ***Call Tracker***  icon on the **Take Calls** toolbar.
- Selected a call, to display the relevant details in the right side of the window.



If Teams have been set up, only 50 incoming emails will be displayed as active calls at any one time.

Additional emails will initially have a queue status but will become active as soon as a space has been cleared via processing some of the actively displayed emails.

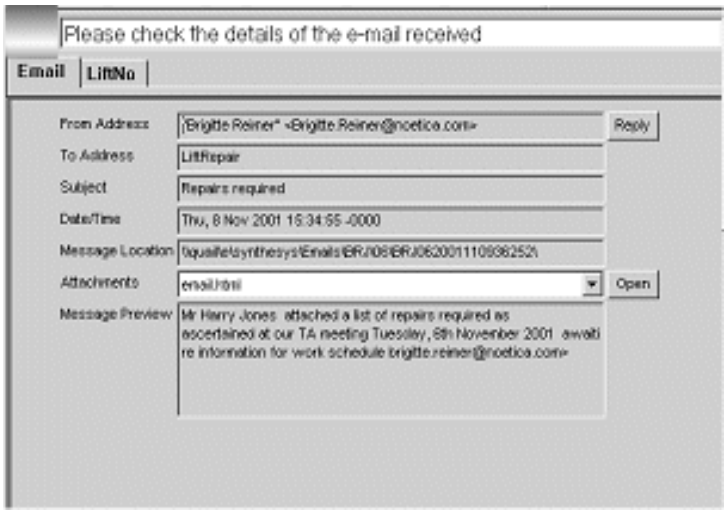
Please see next page for more information about dealing with an Email.

To access and deal with an Email:

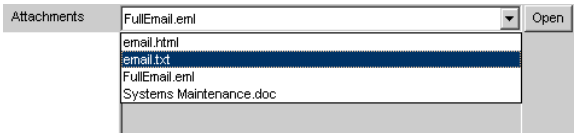
- Click the Edit call icon to open and enter the callflow.

You will see the Pop Watch control, containing all relevant information about the email received.

- To send a reply to the sender, click the ***Reply*** button.



- To open the email and attachments, click the ***Open*** button of the 'Attachment' field.
- Using the drop down menu, either open your full email application and attachments or view the email in html or text format.



Press *Enter* on your keyboard, to move to the next screen.

The callflow will now guide you through the relevant sections to enter data about the email content.

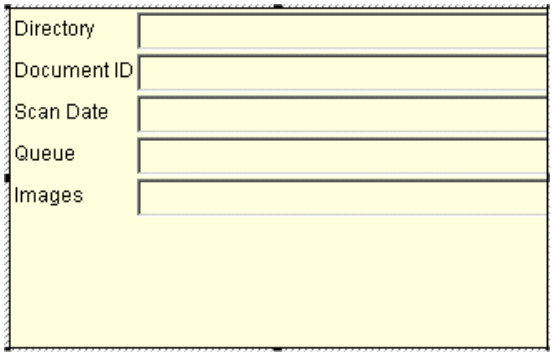
POST WATCH

The *Noetica PostWatch* control is designed to integrate the processing of incoming post and faxes as part of your agents' workflow, generating personalized replies as required.

Post is initially scanned in using an external scanning system and then is placed as a workflow item in the Call Tracker; where it is queued and routed to the correct team, department or individual, ready to be processed.

In order to be able to use Postwatch, customers need additional Software, i.e. 'Recomatics Scanning Software'.

Appearance

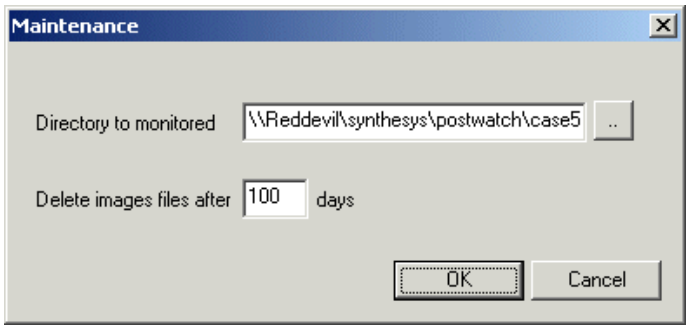


Maintenance

The scanning system used will scan the item of post, write an xml file for PostWatch to read and then puts the scanned image into the relevant work queue.

The PostWatch control is set up within Synthesys to watch a particular folder per work queue for the xml files to process.

The full path to the folder is entered in the *Maintenance* page of the PostWatch control, including ***\\machinename\foldername\filename.xml***.



Example xml file

This xml file that needs to be produced by the scanning solution in order to interact with Synthesys should look as follows:

```
<DOCUMENT>
<DOCID>849302</DOCID>
<CLIENT>Outright</CLIENT>
<QUEUE> Renewals </QUEUE>
<SCANDATE>03/17/2005</SCANDATE>
<IMAGES>
        <IMAGE> z:\spool\postwatch\guardian.jpg </IMAGE>
</IMAGES>
</DOCUMENT>
```

DOCID	A unique reference that can be used to search for the image.
CLIENT	A reference field that is stored in the database and can be used for reporting as well as searching.
QUEUE	A reference to the queue that the document should be added to, again only used for storing in the database.
SCANDDATE	The date the image was scanned.
IMAGE	The location of the scanned image.

Assigning Teams

If you wish to route incoming post to specific teams, you need to:

- Set up the required teams in the *Synthesys Team Manager* and add the agents responsible for handling selected post items to the relevant team.

Enabling Postwatch in your Callflow

When designing your callflow for the Postwatch campaign:

- Ensure that you set the default conclusion flag in your callflow to active.
- If you wish agents from a particular team to deal with the email, select the relevant team in your conclusion.

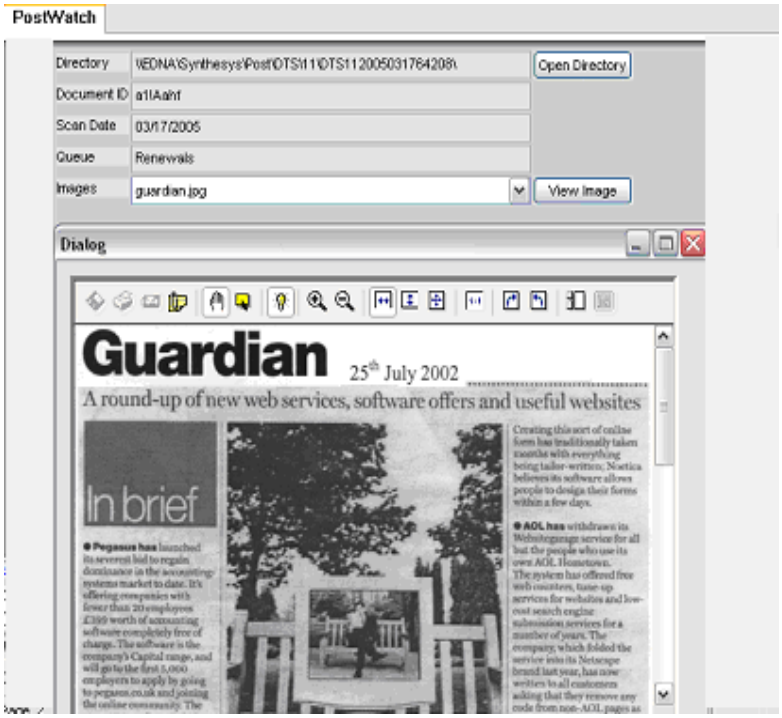
General Use when Taking Calls

To deal with an item of post:

- Agents open the *Synthesys Call Tracker* by clicking on the ***Call Tracker*** icon on the **Take Calls** toolbar.
- They then selected an Email, to display the relevant details in the right side of the window.

To access and deal with the item of post:

- Agents click the Edit call icon to open the callflow and to view the email.



The callflow will guide the agents through the relevant sections and branches, allowing them to enter data about the email content.

PROMPT

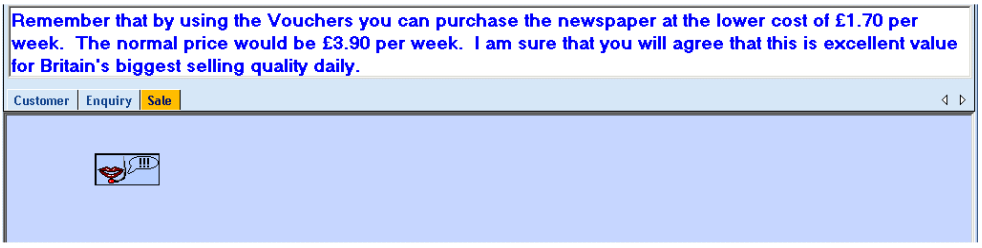
The Noetica Prompt control is a none-data capture control, used to prompt agent dialogue during a call.

Appearance 

General Use when Taking Calls

When you reach the prompt control, no data needs to be captured. Simply take a look at the text, as it will include:

- The questions that you have to ask the caller or person called
- Information that you need to pass on to the caller or person called
- Prompts for you, containing, for example, instructions about the actions that you need to follow

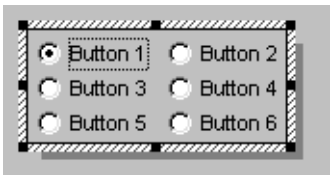


Press *Enter* or *Control (CTRL)* and *Enter* on the keyboard to move on to the next screen.

RADIO

The Noetica Radio control allows a mutually exclusive selection to be made from a number of configurable buttons.

Appearance

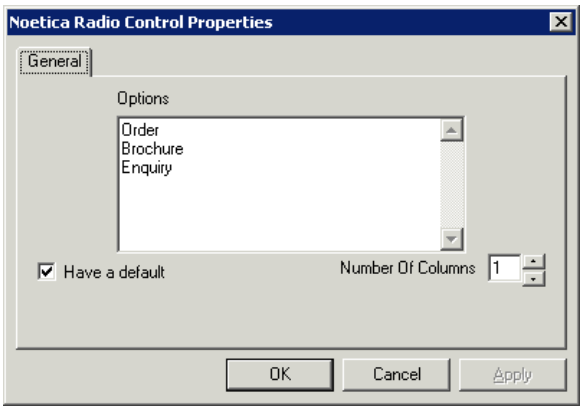


Property Page

Right click on the control and open the *Properties* dialog. Here you can enter the text required for up to a maximum of 20 boxes and specify the number of columns to be displayed, up to maximum of 5 columns.

To enter your own text:

- Click you left mouse button into the *Options* window
- Delete or overwrite the text displayed. In our example, i.e. replace Button 1 etc… with your own words, pressing Enter on the keyboard to move down to the next line.



- Tick the ***Have a default,*** if you wish the control to display a black dot in the first button of the control when taking a call.
- Specify the number of columns to be displayed and click OK.

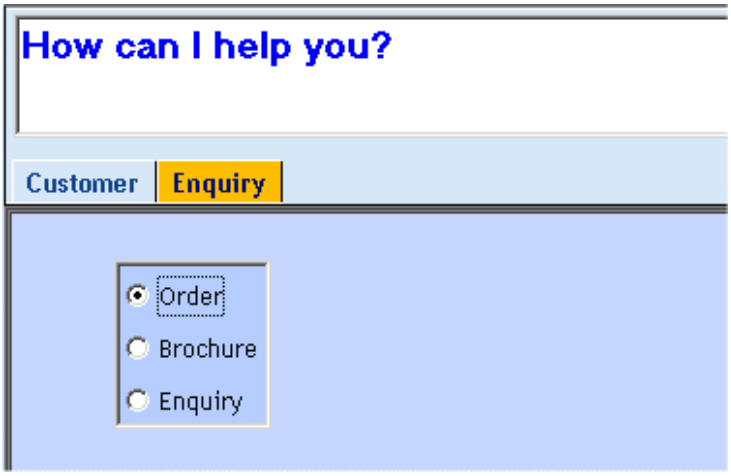
General Use when Taking Calls

The *Radio* control in our example, displays the options *Order, Brochure* and *Enquiry*.

To make the required selection:

- Agents click the left mouse button into the circle next to your caller's choice.

A black dot will confirm the selection, i.e. ***Order***.

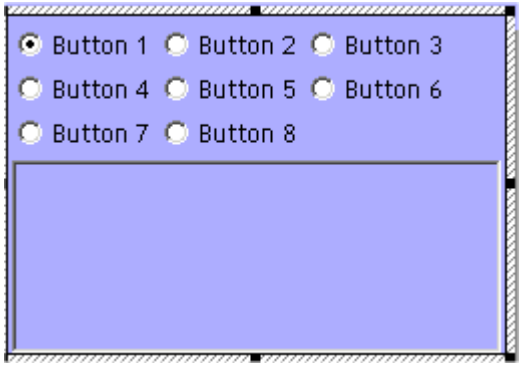


If a black dot is already displayed in the control, agents can use the arrow keys on the keyboard to move up and down the choice buttons.

RADIO TEXT CONTROL

The Radio Text Control combines the functions of a Radio control and a Text box control. A mutually exclusive selection can be made from a number of options and comments for each selection can be added into an associated text box.

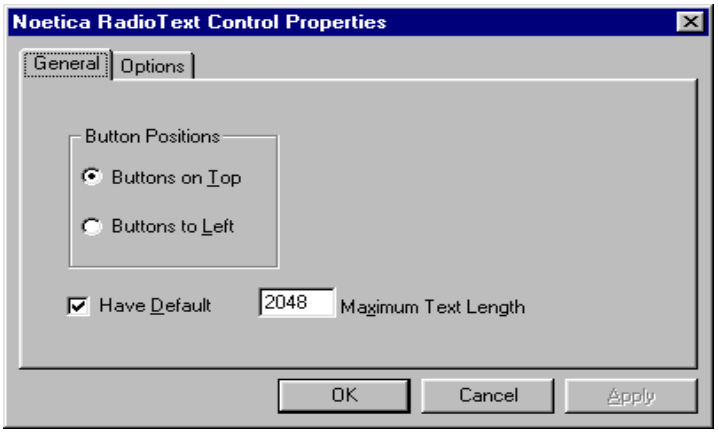
Appearance



Properties

Right click on the control and open the *Properties* dialog.

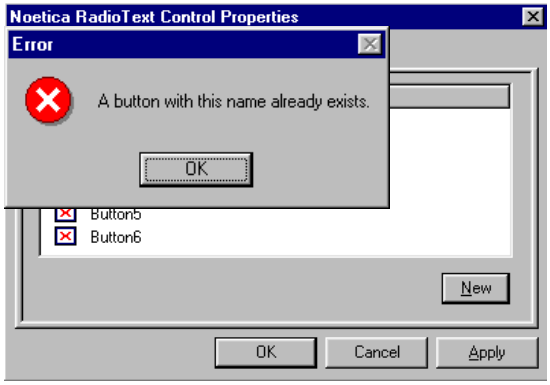
General page	Determine the layout of the control, displaying the buttons on top or to the left of the text box, enable or disable the *Default* button and set a maximum text length for the text box.
Options page	Rename, add or delete buttons and attach one of three states to determine the availability of text for each button.



Editing Buttons

To edit the name of an existing button

- Go to *Options,* highlight the button by clicking on it twice and then type in the new button name.
- If the new button name already exists (in either upper or lower case) then the user is informed with the message ‘a button with this name already exists’.



Adding Buttons

To add new buttons to the control

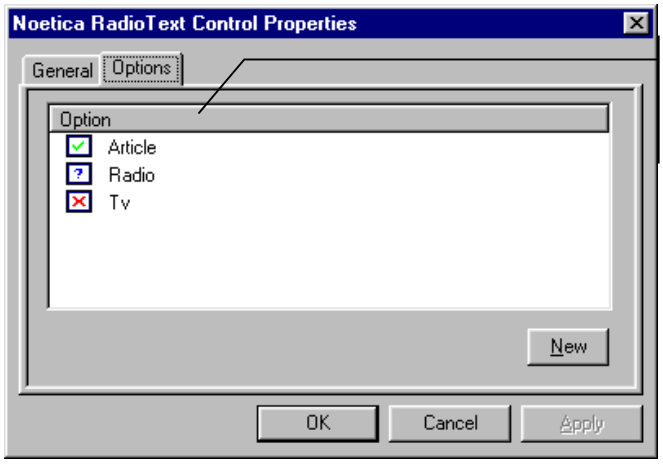
- Click on the ***New*** button to open the ***New Button Name*** window, where the name for the button can be entered.
- On pressing **OK** the new button appears in the list with a default state **X**.

If the new button name is the same as an existing button then a prompt informs the user that a button with that name already exists.

Determine Text Availability

Attached to each button are three states that determine the availability of text:

- ✓ indicates that text **must be entered** in the text box**.**
- **X** indicates that text is **not required**
- **?** indicates that text is **optional**.



To change between states, press the "icon area" to the left of the button name; each "click" changes the state.

Deleting Buttons

To delete an existing button

- Select the button and press the ***Delete*** key on the keyboard.
- Confirm that you wish to delete the button by clicking YES in the next window displayed.

General Use when Taking Calls

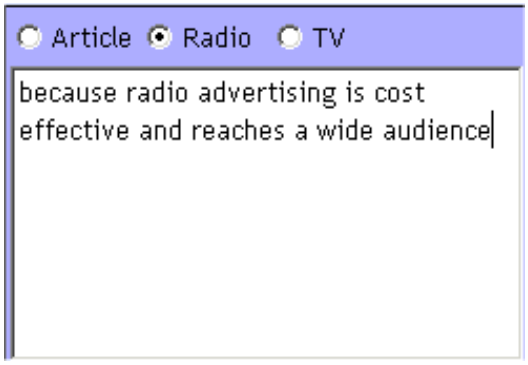
The *Radio Text* control in our example, displays advertising choices, *Article, Radio* and *TV*.

To make the required selection:

- Agents click the left mouse button into the circle next to your caller's choice.
- A black dot will confirm the selection, i.e. Radio and agents can add any information, as required, into the text box displayed.

Text entries may be compulsory, depending on how the control has been set up in the *Campaign Editor.*

If this is the case, a text has to be entered, before agents can move to the next section or control.



SURVEY RADIO

The *Noetica Survey Radio* control is typically used to design survey questionnaires.

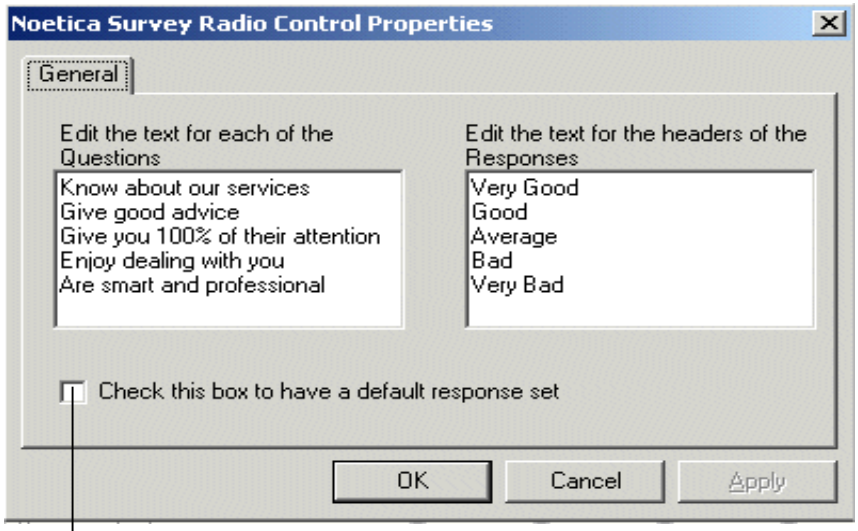
One option per question can be selected from a range of questions and associated responses, displayed together with a set of radio buttons.

Appearance 

Properties

Right click on the Survey Radio control and open the *Properties* dialog

- You can enter a choice of up to 12 survey questions.
- You can enter up to 12 responses (max character length 10) into the *Responses* column.



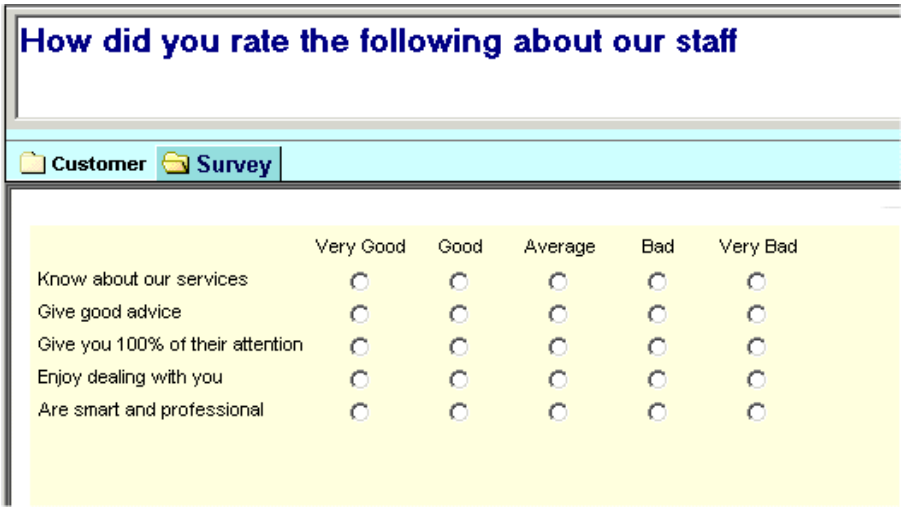
Tick the check box, to display a default response.

If you copy and paste more than 12 questions or responses into the associated columns a message will inform you that these will be ignored.

General Use when Taking Calls

The control displays a range of survey questions and associated responses.

- In response to the caller's answers provided, agents select one option per question by clicking into the available Radio buttons.

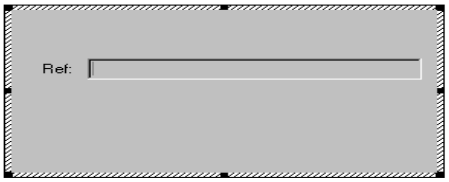


Use *Enter* or *Control (CTRL)* and *Enter* on the keyboard, to move to the next screen.

REFERENCE NUMBER

The *Noetica ReferenceNumber* control allocates a system-wide unique reference number according to a predefined configurable format.

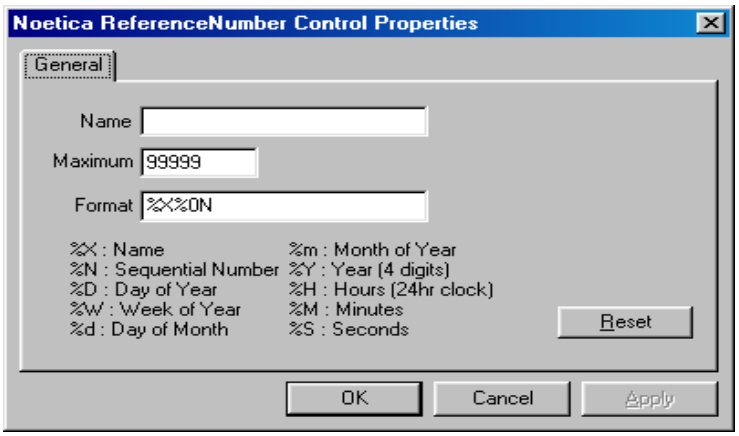
Appearance



Property Page

Right click on the control and open the *Properties* dialog and enter the name or prefix into the ***Name*** field, which will be stored as the database table prefix.

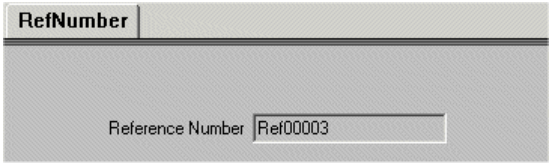
- To display the name or prefix as part of the reference number, select **%X** in the *Format* field.
- To display the serial number, enter **% 0N.**
- To include any other information as part of the reference number, i.e. the month of the call, select **%m(or %0m** if you wish the month to show as 03 for March, for example.



General Use when Taking Calls

When agents reach the section with the *Reference Number* control, a system-wide unique reference number will be allocated automatically.

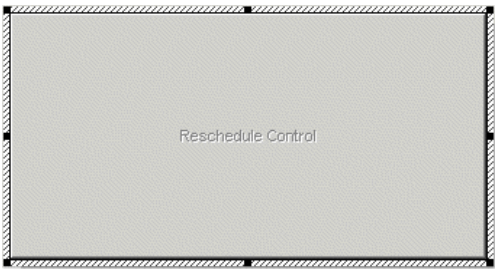
No further action is required. Agents simply press Enter to move to the next section.



RESCHEDULE (NEW)

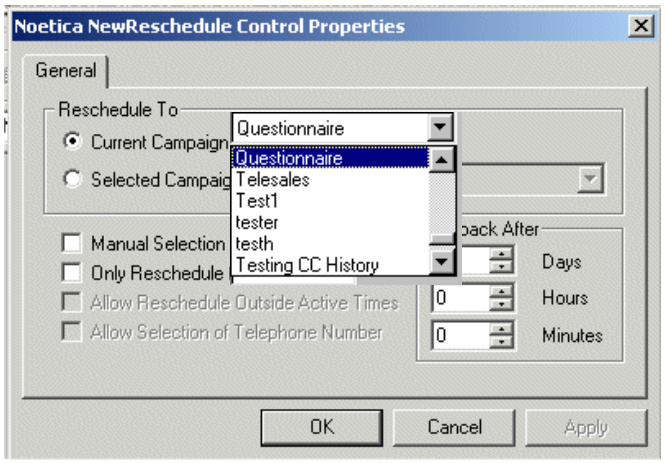
The *New Reschedule* control allows calls to be scheduled to the current or a selected Outbound list, with agents being able to selecting a telephone number for the callback.

Appearance



Property Page

Right click on the control and open the *Properties* dialog, where you can configure the control to *Reschedule To* a ***Current Campaign*** or ***Selected Campaign'***, as required.



Reschedule to:

Current Campaign	To reschedule the call to the same Outbound list that the current call was from (can't reschedule Inbound Calls)
Selected Campaign	To reschedule the call to the Outbound list selected from the drop down menu. Only Outbound lists using the same CRM Prefix will be available for selection. You can schedule Inbound and Outbound calls to an Outbound list.

Other Option available:

Manual Selection of Callback Time	Option ticked: Agents are able to select the time that the call should be scheduled for. The call will be scheduled in the queue with both, the latest and retry times. Option not ticked: The length of time to wait before calling back can be selected in Days, Hours, and Minutes. The calls will be slept rather than rescheduled, allowing the dialler to place the calls after the retry time, but with no latest time.
Only Reschedule for Current Agent	Option ticked: The call will be scheduled for the current agent. Option not ticked: The call will be scheduled for any agent.
Allow Reschedule Outside Active Times	Option ticked: Agents are able to schedule the call for a time that the selected OB Campaign is inactive. Option not ticked: Agents can only schedule the call for a time that the selected O/B Campaign is active. The available active times can be viewed via an 'Active Times' button.
Allow Selection of Telephone Number	Option ticked: Agents are able to select the number to call back on, if the CRM contains more than one telephone number. Option not ticked: The call will be scheduled back to the telephone number that was dialled.

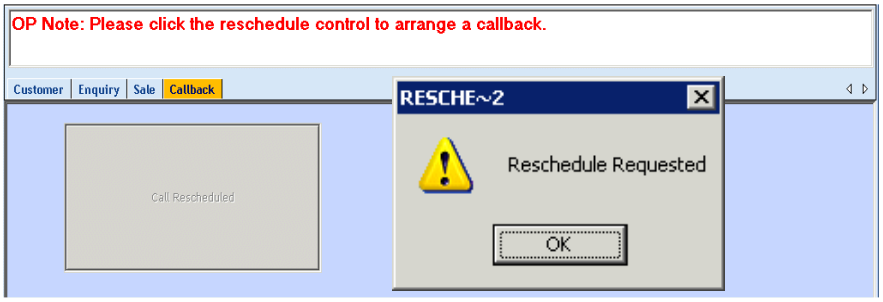
*When **Manual Selection of Callback Time** is selected in the Reschedule controls properties page, you can use the option View Compulsory Properties to set 'AbsoluteRescheduleTime' as a compulsory property, with a message: 'Please click on the Reschedule control and select the date & time for the callback' to prevent agents from skipping through the control without rescheduling the call.*

The actual rescheduling of the call will be handled by the Recycling Engine, which will put a record into the Phoenix_Recycling table, which will contain historically the calls Retry and Latest times.

General Use when Taking Calls

To reschedule the call with a default time:

- Agents click OK in the ***Reschedule Request*** dialog.
- They then click ***Enter*** to move to the next page and finish the call.

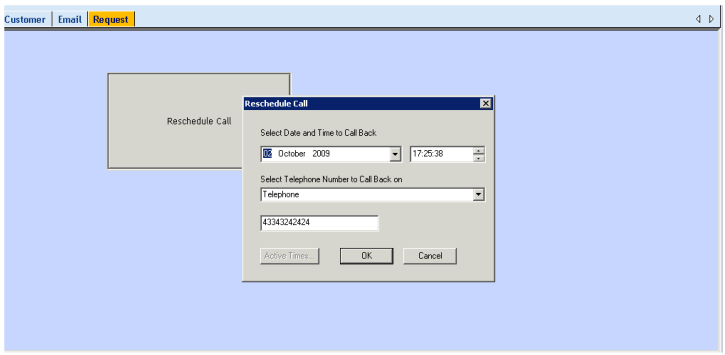


To reschedule the call using the ***Diary Page***:

- Agents open the drop down menu and select the required date from the diary page.
- Next, they select the time for the callback.

If the Telephone option is enabled:

- Agents select the ***telephone type***, i.e. work or mobile and then enter the number on which to call the customer back.
- If the ***Active Times*** button is enabled, they can check the active time settings.
- Clicking the ***OK*** button will reschedule the call.



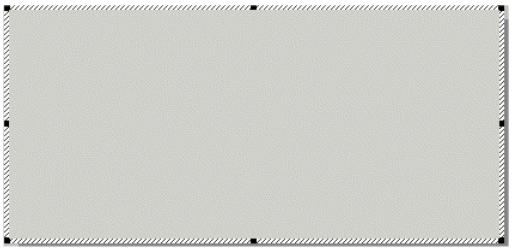
SYMBOL TABLE

The *Noetica Symbol Table* control enables users to utilize data captured in a main callflow and use it within a *Popup script*.

A Popup script is a callflow that is popped into another callflow using the Popup script  *icon on the Tools toolbar in the Campaign Editor.*

Appearance 

The Symbol table control is 'invisible' and does not display any information.



Requirements for using the Symbol Table

In our example we wish to display, inside our Popup script, the caller's *first name*, *surname* and *postcode* that was initially collected in our main Callflow.

The property names required for the Symbol table control therefore need to be added to the ***Synthesys.inf file****, in our case:*

- **[Symbol Table]**
- **PropertyNames=Forename,Surname,Postcode**

Having added the names that you wish to use in your Symbol Table to the Synthesys.inf file, they will subsequently be displayed as public properties in the ***Synthesys Control Gallery.*** You must now go to the Synthesys Control Gallery and *set these properties (in our example Forename,Surname,Postcode) to* ***DB,*** *ignoring the existing Field1-10 properties).*

Any other property names that you may want to use in the Symbol Table, must again initially be added to the Synthesys.inf file and then set as DB properties in the Synthesys Control Gallery.

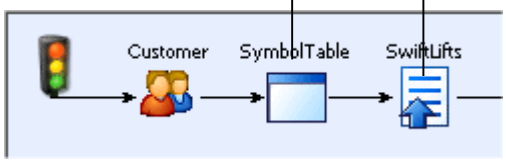
Please contact your system administrator to assist you with entries into the Synthesys inf file and changes to property settings in the Synthesys Control Gallery, as wrong entries could corrupt the workings of Synthesys.

Designing your Callflow using the Symbol Table

In the *Campaign Editor*, a section with a *Symbol Table* control needs to be placed in our main callflow, followed by a Popflow also containing a section with a Symbol Table control.

Main Callflow View:

Section with Symbol Table Popflow containing section with Symbol Table

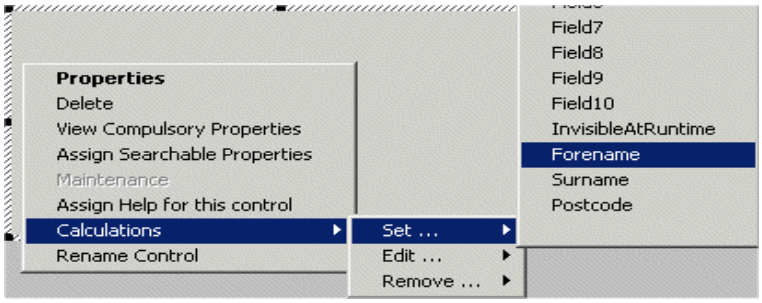


We then need to set up calculations to link the Symbol Table control to the property names created in the Synthesys inf. file.

Calculations for the Symbol Table in the Main Callflow

Inside our Popflow, we wish to display the caller's first name, surname and postcode, initially collected in the main Callflow.

On the Symbol table control, we therefore need to create three calculations based on the *Symbol Table* property names, as entered in the ***Synthesys inf. File: Forename, Surname, Postcode.***

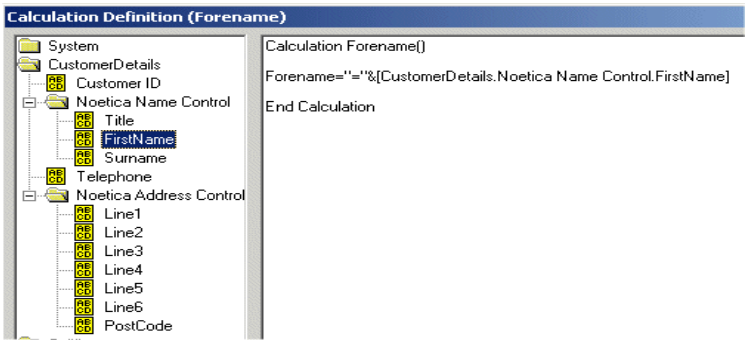


Calculations Example

Calculation for Caller's First Name: Forename="="&

followed by the section and control name in which we collect the caller's first name, in our case the CRM section [CustomerDetails.Noetica Name Control.FirstName].
The full calculation is as follows:

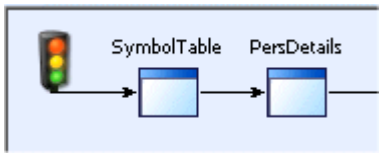
- Forename="="&[CustomerDetails.Noetica Name Control.FirstName].



Following the example above, create a second calculation to display the caller's Surname and a third to display the postcode.

Inside the Popflow

Inside the Popflow we have placed a section with a Symbol table control, followed by a section containing the control(s) to display the information collected in the main Callflow.

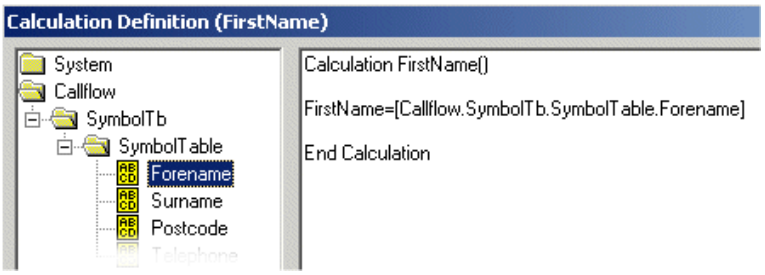


Calculations Example

We now need to create calculations on the control(s) in the Personal Details (PersDetail) section, based on information contained in the Symbol Table control, i.e. Forename, Surname, and Postcode.

Calculation for Caller's First Name:

- Forename=[Callflow.SymbolTB.SymbolTable.Forename]



Following the example above, create a second calculation to display the caller's Surname and a third to display the postcode.

General Use when Taking Calls

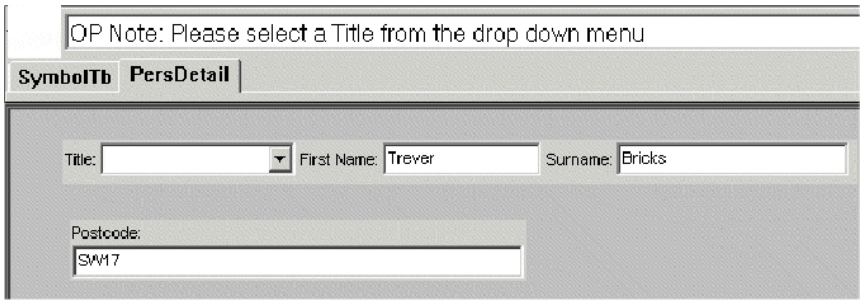
The *Symbol Table* control itself is 'invisible' and does not display any information.

- Agents take a call as normal, collecting all relevant information.
- They skip the 'invisible' *Symbol Table* control pressing ***Enter*** on the keyboard.

The Popup script will open automatically, and again, agents skip a *Symbol Table* control clicking *Enter* on the keyboard.

On reaching the next screen, in our example the *PersDetails* screen, the customer's *First Name, Surname and Postcode* collected in the main callflow are displayed automatically in the relevant control fields.

- In our example, all you would have to enter is the Title.



TELEPHONE

The *Noetica Telephone* control allows the capture of two telephone numbers.

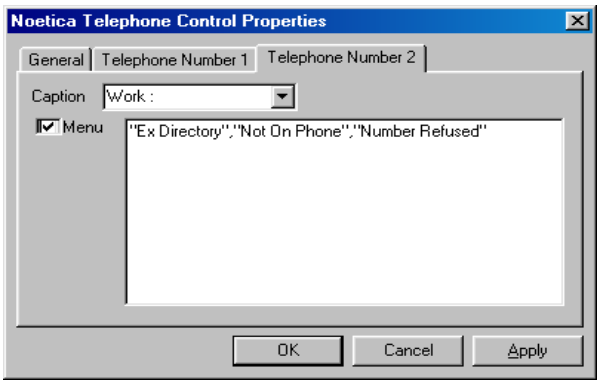
Appearance

Property Page

Right click on the control and open the *Properties* dialog.

- In the General tab, you can select to display 1 or 2 telephone numbers.

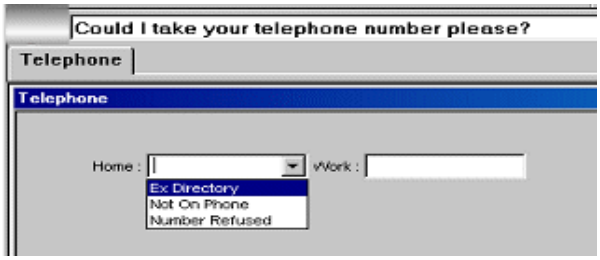
- In the Telephone Number1and Telephone Number 2 tabs, you can tick the Menu field to display possible reasons for not entering a phone number.



General Use when Taking Calls

When agents reach the telephone control, they are able to:

- Enter up to two telephone numbers.
- If they are unable to enter a telephone number and providing that the reason option has been enabled, agents can select a reason for not entering a number from a drop down menu.



- Agents can use the Tab keys ⟵ ⟶ on the keyboard to move to the next field to enter the caller's second telephone number.
- Pressing Shift ⇧ and Tab will move agents back to the previous field again.

TEXT BOX

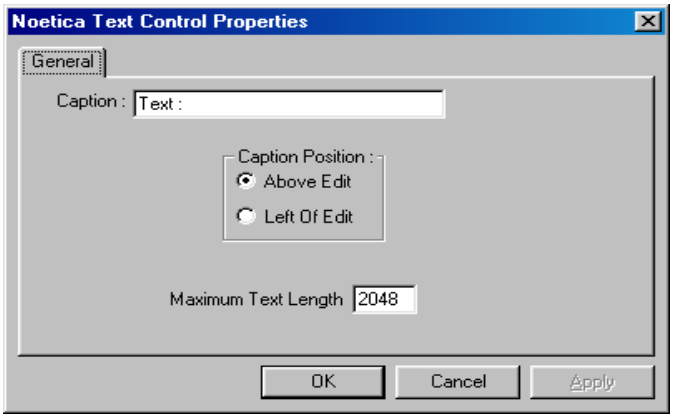
The Noetica Text Control can be used to enter free format text, such as the nature of a call, or a software problem that is being experienced.

Appearance

Property Page

Right click on the control and open the *Properties* dialog. Here you can:

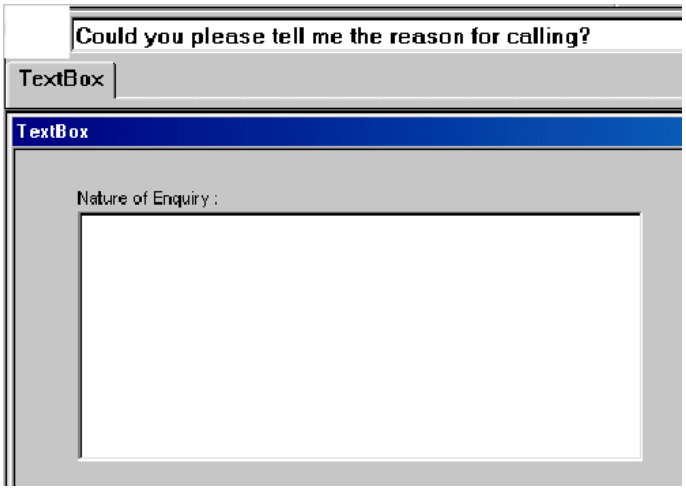
- Enter your ***Caption*** for the text box control.
- Select to display the caption ***Above*** or to the ***Left of the Edit*** control.
- Set the ***Text Length*** allowed, up to a maximum of 2045 characters.



General Use when Taking Calls

Agents when taking calls can enter free text, as required:

- Clicking their left mouse button into the ***Text*** control.
- Typing in the required text or information.



To move on to the next screen agent need to press *Control (CTRL)* and *Enter* on the keyboard.

VERIFICATION

The Noetica Verify control allows only persons with appropriate permissions to go through a certain path in the callflow.

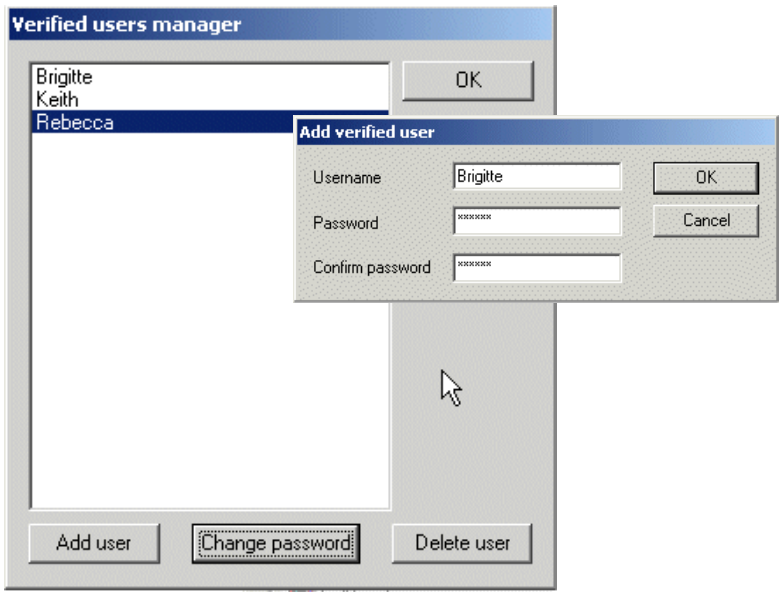
User name and password need to be entered to bypass the verification control, for example after a supervisor has confirmed details of a sale.

Appearance

Setting up User name and Password

The acceptable user names and passwords for the *Verify* control need to be added to the ***AcxVerification.exe*** in the Synthesys bin.

- Open the ***Verified users manager*** screen, logging on with a valid login name and password as set up in Synthesys Personnel.
- To enter new users, click the ***Add user*** button. Enter a user name and password, confirm the password and then click OK.



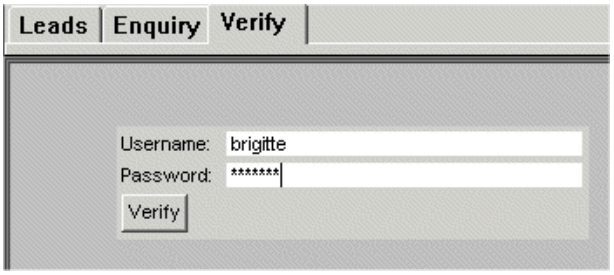
- To change a password, click the ***Change password*** button. Enter the old password, then enter and confirm the new password and click OK.
- Existing users can be deleted via the ***Delete user*** button.

General Use when Taking Calls

When agents reach the *Verify* control they will be unable to continue in the callflow, until a supervisor enters a User ***name*** and ***Password*** into the verification control, having confirming particular details, for example, of a sale.

After a valid user name and password have been entered:

- Click the ***Verify*** button, to continue and finish the call.
- If the user name and password entered for the Verify control are accepted, a message is displayed: ***Verification successful***.
- If the user name and password entered are incorrect a message is displayed: ***Verification failed! Please check you username and password***.



To move to the next section of the callflow, press *Enter* on the keyboard.

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