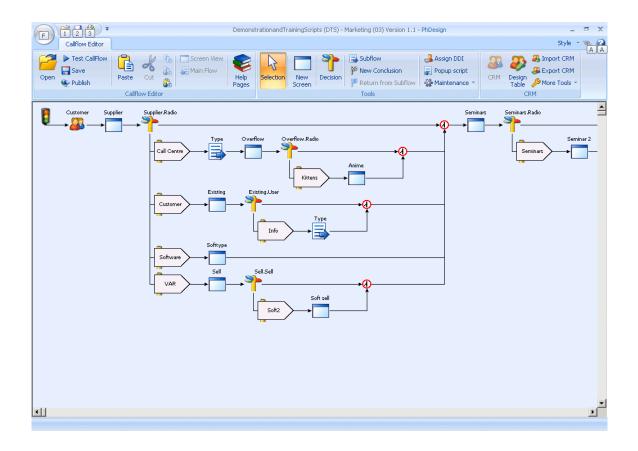


The Callflow Editor Callflow Design





SYNTHESYS CALLFLOW DESIGN

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Introduction

A callflow drives the conversation between an agent and a caller. It achieves this by displaying prompts to agents showing a question to ask, or information they may require during the course of the conversation.

A carefully planned and well-designed callflow should provide all the necessary information to maintain a professional and consistent relationship with a caller. A callflow containing comprehensive details about a campaign allows an agent to respond to any guery quickly and accurately.

The *Campaign Editor* provides you with all the tools you need to design and implement a callflow with the minimum of technical know-how. You can:

- Create and maintain callflows for use within the call centre.
- Develop the callflow, as it will be seen in the agent module during a live call.
- Cc additional support during a live call.
- Produce follow-up procedures to aid call tracking.

The *Campaign Editor* achieves this high level of usability via a Graphical User Interface (GUI), and the implementation of an object orientated design philosophy.

This format provides you with a powerful, elegant and sophisticated interface for callflow development.



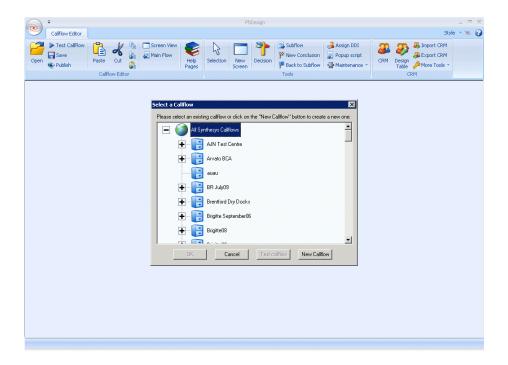
STARTING THE CAMPAIGN EDITOR

At the Synthesys Main Screen:

• Click on *Campaigns* under the **Setup** heading.

The *Campaign Editor* will open, provided that you have the required access permission set up in Synthesys Personnel.

The Campaign Editor displays the Edit Room, with the Select a Callflow screen. Here users can either select an existing callflow, or create a new one.



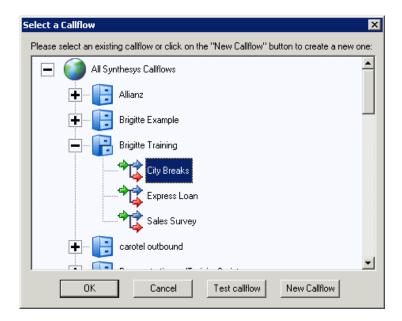


Understanding the Select a Callflow Screen

The Select a Callflow screen shows a tree structure, similar to the one in your Windows Explorer and graphically represents the customer accounts and callflows that are stored within the system (Edit Room).

A callflow is created for each campaign you are managing and is stored under the appropriate customer account.

The Edit Room in which all callflows are held.





A filing cabinet represents a customer account.



The open drawer represents a customer account that has been selected.



The group of arrow icon shows a campaign for which a callflow has been created.



Selecting an Existing Callflow

To work with an existing callflow, follow the steps below:

At the **Select a Callflow** screen, locate the customer account to which the callflow relates. You can do this in two ways:

- Use the vertical scroll bar to move up and down the structure of accounts until the required customer account is displayed.
 - -Or-
- Press the first letter of the required customer account to move to that section of the directory.

When the required customer account is displayed, click on 🖶 next to the account's filing cabinet. Existing callflows for the selected customer are displayed.



If no \boxdot is shown next to the customer account, then no campaigns currently exist for that customer. For details on how to create a new callflow, see the next section.

Click on the callflow that you want to work with.

Click on to open the selected callflow in the *Campaign Editor* main screen.



Setting Up A New Account

At the Select a Callflow screen:

• Click on New Callflow to display the New Callflow window.



- Click on New Account... to display the New Account window and enter the details of the new account.
- The Account Name, Prefix and Account Manager fields are compulsory and must be completed.

The Prefix that you enter must be unique and only contain three letters. It is used to identify all data held against the account and allows easy identification of data held in database tables.



When you have entered the account details click OK to save the details and return to the New Callflow window.



Setting Up A New Campaign

Back in the New Callflow window:

 Enter a name for the campaign into the Name field, in our example it is 'Training'. The name should represent the campaign it is designed to support.



Accept the default Auto Archive and Auto Purge settings, or enter alternatives if required. See the following for details:

Auto Archive	Defined in days. When a call becomes the specified number of hours old and it has either an Active or Inactive status, it is automatically archived.
Auto Purge	Defined in days. Any archived call files that are older than the specified number of days are automatically removed from the server.

- Click on OK to return to the *Select a Callflow* screen, where the new callflow is added to the directory under the new customer account.
- Click on OK to display the Campaign Editor main window and to start building your new callflow.

The new account and callflow will be added to the directory.

For an overview of the Campaign Editor and the functions that are available to help you build a callflow see the next section **Using the Campaign Editor Main Screen**.

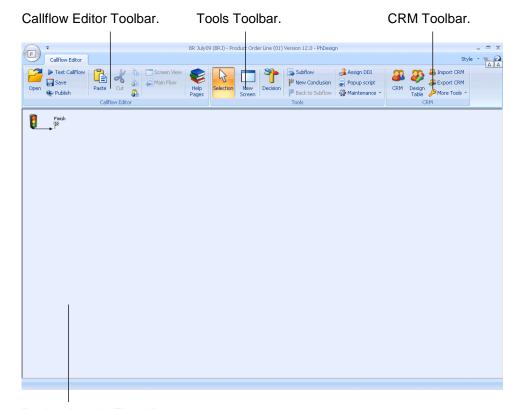


USING THE CAMPAIGN EDITOR MAIN SCREEN

To open the Campaign Editor main screen:

• Select your campaign in the **Select a Califlow** screen and click OK.

The *Campaign Editor* main screen is displayed. It is here that you build and modify the overall flow of your callflow and the paths that can be taken through it.



Design Area in Flow View.

The following sections describe each of the elements indicated above.



THE TOOLBARS

The Campaign Editor main screen has three toolbars in Flow View:

- · Callflow Editor Toolbar.
- · Tools Toolbar.
- CRM Toolbar.

Callflow Editor Toolbar

The Callflow Editor toolbar is used for opening, editing and publishing callflows, for assigning web style help pages and for moving between screen and flow view and subflow and main flow.

Tools Toolbar

The Tools toolbar enables users to build callflows quickly and easily, dropping screens, decisions and conclusion flags, as required.

Via the Maintenance drop down menu of the Tools toolbar users can import existing callflows, assign a DDI number to a campaign and import rota details for a specified prefix.

CRM Toolbar

The CRM (Customer Relationship Management) toolbar is used to access and design CRM tables and to import or export customer data.

Via the More Tools drop down menu of the CRM toolbar users can access the Synthesys Global Gallery and can maintain the CRM, deleting selected CRM history events and unused CRM prefixes.

Please see the next pages for more information regarding the options available using the Callflow Editor, Tools and CRM toolbars.



The Callflow Editor Toolbar



Option Description



Open. Display the *Select a Callflow* window. From this window users can open an existing callflow or create new callflow.



Test Califlow. Testing of a callflow before it is published.



Save. Save the currently displayed callflow. Callflows are automatically saved to the central server using a fixed format file name. The file name is generated using the account prefix and the name of the callflow.



Publish. Publish the callflow to save it to the central server and to broadcast it to the entire call centre. Agents in the call centre can only use a callflow after it has been published.



Paste. Paste the contents of the Windows clipboard at the cursor /insertion point.



Cut. Remove the currently highlighted selection and place it on the Windows clipboard.



Copy. Copy the currently highlighted selection to the Windows clipboard.



Copy Global Block. Copy a selected screen, subflow or CRM and save it to the Global Gallery.



Insert Global Block. Pick up a Global block from the Global Gallery and insert it into the callflow.



Screen View. Switch to display *Screen View* mode.



Main Flow. Switch from Subflow View back to Main Flow View.



Help Pages. Assign and create web style help pages. Help can be assigned to the customer account, the callflow, an individual screen of the callflow, or a control.



The Tools Toolbar



Option Description



Selection. Activate the selection tool. Your cursor is changed to an arrow, which can be used to select a specific area of the callflow.



New Screen. Add a new screen to the callflow.



Decision. Add a new decision to the callflow. A decision allows the callflow to react to questions in different ways.



Subflow. Add a subflow to the main callflow to help keep the callflows uncluttered. A subflow may contain screens that you want to use several times throughout the callflow.



New Conclusion. Add a new conclusion point to a particular area of the callflow.



Back to Subflow. To enter the subflow again.



Assign a DDI number to the callflow. This allows calls for a campaign to be routed to specific agent(s), automatically displaying the appropriate callflow.



Insert Pop script. Add a pop script to a current callflow to allow agents in *Take Calls* to move from the original callflow through an embedded pop script and back to the original callflow.



MAINTENANCE. To access a range of available maintenance functions via a drop down menu, including:



Export to CSV file. Allows you to export callflow design details, i.e. screen/control names and agent dialogue prompts, as a csv file.



Import PHT file. Allows you to import existing callflows.



Check Calculations. Check through all calculations in the callflow.



Add Tables to Impromptu Catalog. Will automatically add tables and create joins for the Cognos Impromptu report writer.



Import Rotas. The Rota Import facility allows the import of rota information using csv or xls files. The Rota import programme loads the input file and puts the associated data in the rota tables for the specified prefix.



Maintain Synthesys Controls Gallery. Access the Synthesys *Gallery*, where *ActiveX Controls* can be added and deleted.



The CRM Toolbar



Option Description



CRM. Add Customer Relationship Management to a callflow.



Design Table. Opens the CRM Design Table, where users add any data fields, as required.



Import CRM. Opens the CRM Import wizard, guiding users through the process of importing customer data.



Export CRM. Opens the CRM Export wizard to enable users to export customer data as a csv file.



MORE TOOLS. To access CRM maintenance and the Synthesys Global Gallery via a drop down menu:



History Cleanup. Delete specified CRM history events selecting CRM prefixes and date range.



Delete Prefixes. Delete unused CRM prefixes. A CRM prefix can only be deleted if it is no longer used inside a callflow.



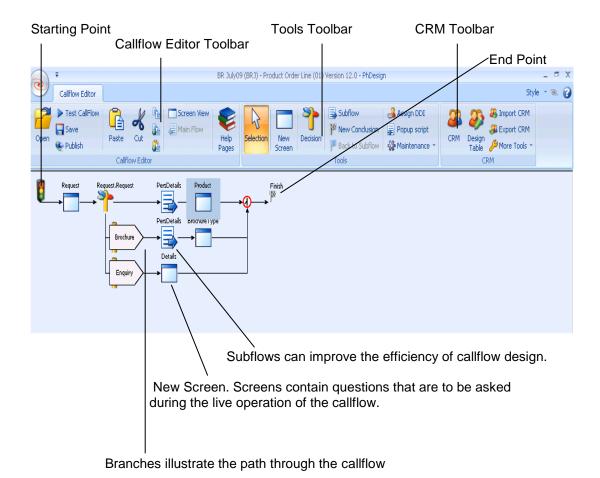
CRM Control Gallery. To access the list of controls available in the CRM.



VIEWING THE PATH OF A CALLFLOW

On accessing the *Campaign Editor*, the *design area* automatically shows the selected callflow in *Flow View*.

Using a road analogy, traffic lights indicate the starting point of your callflow and a chequered flag signals the end.



To build a callflow, new screens placed in between the start and finish, contain the questions that are to be asked during live operation of the callflow. A *Decision Point* and associated branches within the Callflow determine the paths that can be taken during a call.

All callflow elements are represented by symbols, which are described in the table on the following page.



Symbol Represents



The start of a Callflow. It is automatically placed in the *Design Area* when building a new callflow.



A Conclusion Point within the callflow. A *Conclusion* is automatically placed in the *Design Area* when building a new Callflow to indicate the end of the callflow. Further *Conclusion Points* can be placed on branches, if the call needs to be ended before the natural end of the callflow is reached.



A *Screen* within the callflow. The name of the screen is shown above the symbol. You can view the contents of a screen by double clicking on the symbol. This displays the *Design Area* in *Screen View* mode. See page 46.



A **Decision Point** within the callflow. Decision points are used to split the flow of the Callflow, by allowing for different branches to be taken if certain conditions are fulfilled.



The end of a decision point. All branches for a particular flow converge on this point, ready for the flow to move onto the next appropriate screen.



A Branch, or path, that can be taken through the callflow. A branch always belongs to a decision point.



A *Subflow* contained within the main callflow. Subflows are mainly used to stop the *Design Area* becoming too cluttered. For example, if a particular sequence of screens is used more than once, then that sequence can be contained within a subflow and reused as many times as required throughout the callflow. It should be noted that a subflow can only be used once in the same flow (i.e. whichever way you traverse the callflow you will only encounter the same subflow once.)



A Popup script can be inserted into a current callflow. In the Agent view, the agent will initially take information on the original callflow, with the embedded callflow popping at the appropriate point. Once the relevant details have been collected the call will return to the original callflow.

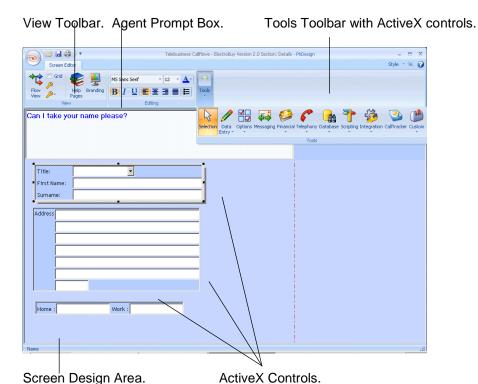


WORKING WITH A SCREEN

Screens within a callflow contain the questions that are to be asked during a live call.

To view or maintain the contents of a screen within a callflow:

• Double click on the *Screen* icon on the *Tools* toolbar in the *Flow View*.



Questions within the screen can be designed in a WYSIWYG (What You See Is What You Get) fashion using *ActiveX Controls*. These can be sized and positioned as required. Text for the *Agent Prompt Box* can be produced in a variety of sizes, fonts, styles and colours. This type of embellishment is ideal for highlighting intonation or important areas of the callflow.



All ActiveX Controls placed in a screen must be contained within the red dotted lines. Anything you place outside the dotted lines may not display correctly at certain screen resolutions.

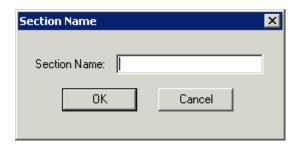
To return from inside a screen back to the *Flow View*, click on the *Flow View* icon.



Adding a New Screen to the Callflow

To add a new screen to the callflow:

- Click your left mouse button on the New Screen icon at the Tools toolbar.
- Move your mouse pointer over to the new callflow. Your mouse pointer has changed to a box attached to an arrow.
- To drop the screen, left click on the line between the traffic lights and the chequered flag.
- A dialog box is displayed prompting you to give the new screen a name.



 Enter a name into the Section Name field and click OK to add the new screen to the callflow.



Always give your screens a descriptive name, as they will be displayed as tab headings when taking calls, helping the agent to navigate backwards and forwards through the callflow.

To enter the required controls and agent dialogues:

• Double click your left mouse button on the screen to open the Screen View.

The following pages explain the main features of the *Screen View*.



THE SCREEN TOOLBARS

The screen view consists of three main toolbars:

- View Toolbar
- · Editing Toolbar
- Tools Toolbar

View Toolbar

The View toolbar is used to specify grid settings, colours and branding and for assigning web style help pages.

Editing Toolbar

The Editing toolbar enables users to apply formatting to text entered into the agent text prompt box.

Tools Toolbar

The Tools toolbar provides access to Noetica ActiveX controls and services via a range of drop down menus to facilitate the design of complex campaigns.



The Tools toolbar is configurable. You can add any of the available controls to the existing control categories and even add the same control under several headings.

For more information please see the next section 'Configuring the Tools toolbar'.

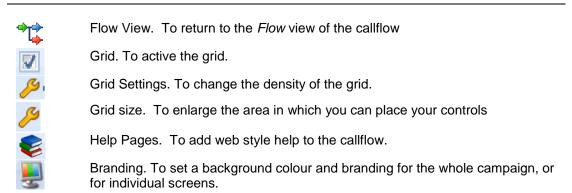
The next few pages provide a description of the available toolbars in *Screen View* and of the existing Noetica ActiveX controls.



View Toolbar



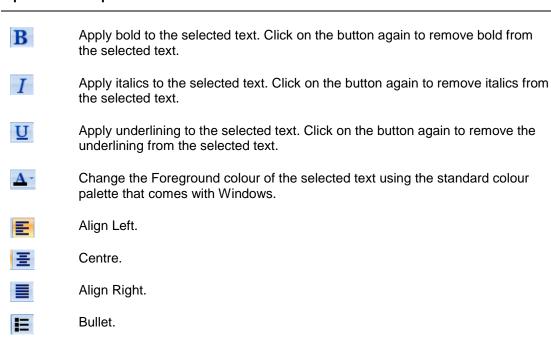
Option Description



Editing Toolbar



Option Description





Tools Toolbar

The Tools toolbar is totally configurable. You can add any of the available Noetica ActiveX controls to any of the existing control categories.

If you wish, you can also display selected ActiveX controls under several category headings.



Symbol Tools Control Category



Selection. Activate the selection tool. Your cursor is changed to an arrow, which can be used to select a specific area of the Callflow.



Data Entry. Configure to display Noetica data entry type controls, as required, including for example the Address, Text and Edit controls.



Options. Configure to display any Noetica controls, as required.



Messaging. Configure to display Noetica controls associated with messaging, including for example the Popwatch or Postwatch controls.



Financial. Configure to display any Noetica controls associated with finance and payment, including for example Payment and Discount controls.



Telephony. Configure to display Noetica controls around telephone and dialling, for example New Reschedule, DoNotCall and Telephone controls.



Scripting. Configure to display Noetica controls supporting specific campaign requirements for example the Blocking, Reference Number and Verification controls.



Database. Configure to display Noetica controls that require creating a database table via the control maintenance page or that return data from a user defined table by means of a "SQL" statement, including for example the DB Table and DB Combo box controls.



Integration. Configure to display Noetica controls integrating to third part software, for example the Address and Exchange Diary controls.



Call Tracker. Configure to display Noetica controls associated with the Call Tracker and escalation procedures, for example the UMS Message, Theatre Allocation and Follow up controls.



Custom. Configure, for example, to display controls specifically developed for your company or for a specific purpose.

For more information about adding selected controls to the above control categories, please see the next page *Configuring the Tool toolbar*.

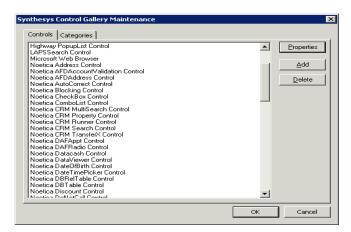


Configuring the Tools Toolbar Categories

To arrange the existing Noetica controls under the available category headings, to meet your own requirements:

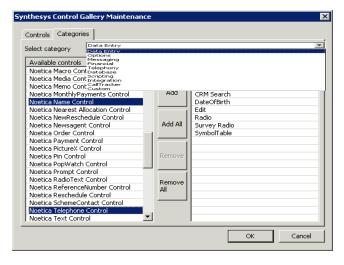
- Return to the Main Flow of the Campaign Editor.
- Click on Maintenance on the Tools toolbar and select the Maintain Synthesys Controls Gallery.

The Synthesys Control Gallery Maintenance dialog, with available Noetica ActiveX controls.



To put existing controls under different category headings:

- Click the Categories tab at the top of the dialog.
- From the Select category drop down menu, select the category heading.
- In the Available controls column of the left, highlight the controls that you wish to move.
- Use the Add button to move the selected controls into the Category Controls column on the right of the dialog.



To add all controls from the Available controls column into the selected category, use the **Add All** button.

Use the **Remove** button, to remove selected controls, or the **Remove All** button, to remove all controls.

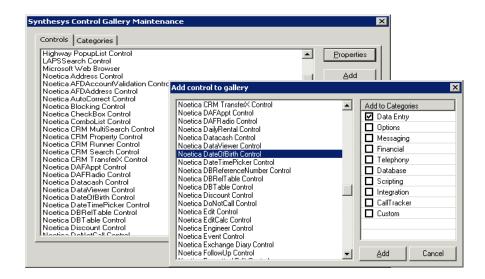


Importing ActiveX Controls into Synthesys

Third party *ActiveX Controls*, or ones you have created yourself using Visual C++, can be imported for use within *Synthesys*. The compiled code for the existing controls (.ocx files) are stored within the Synthesys\bin directory of your server, along with the other executable files for *Synthesys*.

To insert a new control into *Synthesys* you must first copy your compiled code to the Synthesys\bin directory on the server and then follow the steps below:

- In the *Main Flow* of the Campaign Editor go to the **Tools** toolbar and select **Maintenance** and click the *Maintain Synthesys Controls Gallery*.
- The Gallery window is displayed, which lists all the controls that are currently stored within Synthesys.
- Click on display the Add Control to Gallery window to display all registered ActiveX Controls that are installed on the Synthesys server:



Select the required control and Category click on _____. The selected control is added to the category list. *Please see the next page to configure the control.*



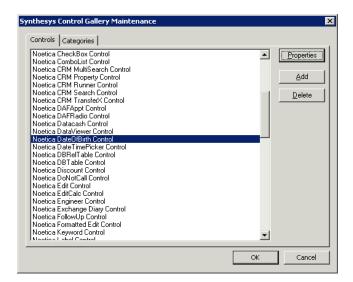
If the control you wish to add to the Gallery is not displayed in this list then the control has not been placed into the Synthesys\bin directory on the Synthesys server -or-

The control has not been registered on the local machine. When the .ocx file of the required ActiveX Control is placed within the Synthesys\bin directory it should be automatically registered. Alternatively, to register the control manually, go to the DOS prompt and find the directory in which the regserv32.exe file is located. Type in regserv32, followed by the path of your .ocx file and press the Return key on your keyboard.

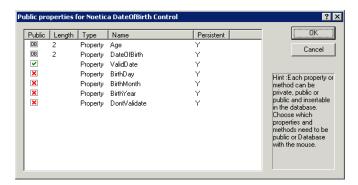
Please contact your IT department, to assist you with importing and registering new ActiveX controls.



Select the control you have just added and click on Properties



• The *Public Properties* window for the selected control will be displayed:



- Select the *Public* check box so a green tick is displayed. This setting makes the property available for branching.
- Select the Public check box again to display the Maximum Field Length window:



- Click on _____. This makes the property both public and its value can be stored within the *Synthesys* database.
- Click on to return to the Gallery window and then again to return to Screen View. The new control should now be displayed in the selected toolbar.



Customizing ActiveX Controls

If required, size and colour settings of Noetica ActiveX controls can be changed adjusting the settings in the Branding.inf file, which is located on the Synthesys Server:

\\Server\Synthesys\etc\Custom

```
### Branding controls the default look and feel of the Take Call modules.

[General]

NormalTextColour=0,0,80

BackgroundColour=190,194,194

Font=Arial,140,FW_BOLD

[SymTabCtrl]

SelectedTextColour=255,255,300

; Font is any Windows font. Second parameter is point size*10. Third can be ; FW_BOLD, FW_THIN, FW_EXTALIGHT, FW_BOLD, FW_NORMAL, FW_BLACK etc.

SelectedFont=Arial,140,FW_BLACK

; otherTextColour is used for the Left/Right Scroll Buttons as well as Text on Other Tabs ; otherTextColour=0,0,0 otherTabcolour=255,255,255

; Position Options are Center,Tile,Stretch (default)

[PhRun]

DefaulTPicture=%LOCAL%\bin\Runner.jpg

DefaulTPicturePosition=Stretch

IdlePicturePosition=Stretch

IdlePictureStion=Stretch

IdlePicturePosition=Stretch

MinimumPromptLhes=4

(CTITOolbarbocking=Top the CTITOolbarbocking=Top the CTITOolbarbocking=Floating

[Label]

TextColour=120,140,250

Font=Arial,18,FW_Thin
```



Please contact your IT department, to assist you with changing the Branding.inf file, as this will effect the appearance of all Noetica controls in all your campaigns.



ACTIVE X CONTROLS

ActiveX Controls are essentially the building blocks of your Callflow. As the Callflow is made up of screens, each screen is made up of ActiveX Controls and associated text that has been entered into the Agent Prompt Box.

The combination of an *ActiveX Control* and *Agent Prompt Box* text constitutes a question within the screen. These questions are used to collect data from campaign calls.

Each ActiveX Control defines how a screen is presented when the Callflow is run. They also control related background tasks, such as building database tables and retrieving specific data.



Noetica Controls will be provided as part of your ongoing maintenance and support contract. Ranges of other controls are also available from a variety of third party sources, such as Microsoft.

These can be added to the toolbar using the Control Gallery option, which is located on the Maintenance pull down menu on the Tools toolbar.



List of Standard Noetica ActiveX Controls:

Control Used To



Address allows the capture of a postal address, including postcode. Address details can be entered manually or using additional addressing software, the address can be completed automatically on the entry of a postcode.



Application Launcher is used to link Synthesys to other applications by launching target applications at strategic points in the callflow when talking calls.



Blocking 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.



Checkbox displays a group of Windows style check boxes. Any number of boxes can be created.



Combo List displays a Windows style drop down list. The list of available items is referenced from the database.



CRM Property enables the modification of customer details set-up in the CRM control (Customer Relationship Management). Multiple instances of the *CRM Properties* control can be positioned at strategic points anywhere in the callflow.



Date of Birth allows the capture of a caller's date of birth.



Date Time Picker allows the capture of any date (past, present and future) from a diary page displayed, as well as allowing the capture of the time.



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



DB Combo box 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.



DBTable is typically used to maintain lists of clients and sites. It allows users to search on client data to bring up full information about that client or site. The control is often used in conjunction with Synthesys service call rotas. Based on the location of an office the correct Service team for that area can be contacted automatically.



Control Used To



DB 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.



Discount 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.



Do Not Call is used to take customers scheduled for a call back out of the queue of an Outbound list, if they phone in before the scheduled Outbound call is due.



Edit is a text box that can accommodate numerical, currency, text or alphanumeric input. Specific masks can be created which force the agent to enter information in a specific format or automatically converts it into that format.



Editable Calculation 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.



Formatted Edit 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.



Follow-up is used to handle calls that are a follow-up of a previous call. The callflow and required fields to be displayed are selected in the controls properties page and search terms can be identified.



Media Code allows the capture of a media source code. Based on a reference number or media name, full source details can be displayed on screen. The control is used primarily for the purpose of market research.



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



Memo 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.



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.



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



Control Used To



Order is used for placing orders for multiple goods and services. Products and prices are set up in the control and VAT, post and packaging, invoice sub-totals and totals can be calculated automatically. Goods can be searched for by product category, manufacturer or product code. Discounts, price matching and product warranties can also be included.



Special Order allows the taking of orders including up sell schemes & special offers, postage and packing costs and other features. Lists of products and prices can be imported from the database.



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



Picture allows JPEG, GIF, or PNG pictures to be displayed in a screen, together with other controls.



PIN 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.



PopWatch enables incoming emails to be inserted into the Call Tracker as a new call, based on the callflow that contains the *Pop Watch* control. Emails can be accessed and dealt with by entering the callflow using the Edit icon in the Call Tracker. An automatic reply regarding the receipt of the email can be sent out to the customer via a report.



PostWatch 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 (i.e. 'Recomatics Scanning Software) and then 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.



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



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



Radio Text combines the functions of a *Radio* control and a *Text* 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.



Reference Number allocates a system-wide unique reference number according to a predefined configurable format.



Control Used To



New Reschedule allows the agent to schedule a call to a more convenient time for the customer. Calls can be rescheduled automatically to call customers after a pre-selected period or the operator can choose a date and time from a diary page. Calls can be rescheduled to the current or another Outbound list and agents can select the telephone number for the callback.



Survey Radio is typically used to design survey questionnaires. From a range of questions and associated responses, displayed together with a set of radio buttons, one option per question can be selected.



Symbol Table enables users to utilize data captured in a main callflow and use it within a pop flow.



Telephone is used to capture up to two telephone numbers.



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



Verify allows 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 for a supervisor to confirm a sale.



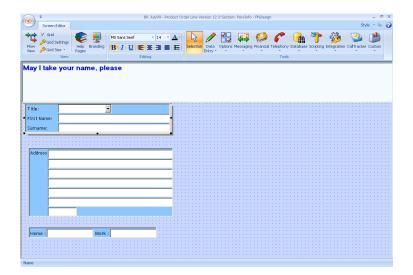
THE SCREEN DESIGN AREA

The *Screen Design Area* can be thought of as a blank canvas on which you paint the required controls. Controls are selected from the *Tools Toolbar* and placed into the *Screen Design Area*. Once placed, each control can be configured as required by setting a number of properties.

Grid Settings

When you put more than one control into a screen you may find it easier to line up the controls using a grid.

- To activate the grid, select Grid from the View toolbar
- To change the density of the grid, select *Grid Settings*
- To enlarge the area in which to place your controls, select *Grid Size*.



Show all Controls

In some cases you may wish to display all controls within a screen to the agents when taking a call, rather than displaying one control at a time.

• To enable the all controls option, go to the *Tools* toolbar in the main flow of the *Campaign Editor*.

Select *Maintenance* and *Show All Controls* from the drop down menu.



Background Colour and Branding

You can set a background colour and branding for the whole campaign, or for individual screens.

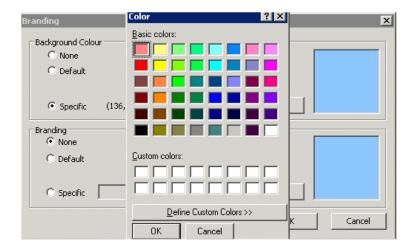


To set different colours and branding images for particular screens, open the screen, before selecting the Background Colour & Branding option.

Background Colour

To display background colours and to insert a branding image, go to the:

- **Tools** toolbar in the main flow of the Campaign Editor.
- Select Maintenance and Background Colour & Branding from the drop down menu.
- In the Background colour section of the Background dialog, select 'None', if you do not want to display a background colour.
- Select **Default**, to display the default colour.
- Tick Specific in the Background colour section and click 'Select' to pick a
 colour from the Basic colours panel in the Color window. To define the colour
 further, click the Define Custom Colors>> option.



Branding Image

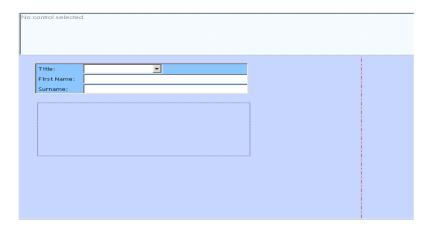
To select a branding image (BMP, Jpeg, etc) of your choice, tick **Specific** in the Branding section and select the required file via the *Open* dialog.



Placing ActiveX Controls

To add the desired ActiveX controls to the screen, select the control from the relevant drop down menu by clicking you left mouse button on the control.

- Having selected the control, move your mouse to the top left corner of the design area in the screen.
- Click and hold down the left mouse button and drag the mouse to the right and down slightly to produce the outline of a rectangle. For example:



- Release the mouse button and click OK to drop the control.
- Enter a short, descriptive name for the control so that the information recorded by it can be easily identified in the system database.
- Click OK. The *ActiveX Control* is created and placed within the *Screen Design Area*.



Examples of ActiveX Controls

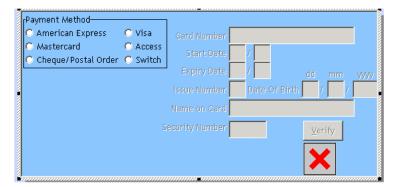
When a control is selected from one of the category folders on the Tools *Toolbar* and placed within a screen, it looks very much as it does in the Agent view, when the live callflow is run.

The following are typical examples of ActiveX Controls used within a callflow screen.

Example 1: Cheque and Credit Card Verification

This control is created using the *Noetica Payment Control* option. This control consists of radio buttons and input fields that confirm valid payment details.

Radio buttons, from which one selection can be made



Fields that become active when a radio button selection has been made.

Example 2: Name

This control is created using the *Noetica Name Control* option. The control displays input fields for a client name.

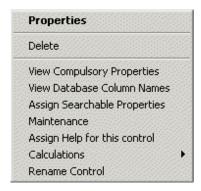




Understanding ActiveX Options

If you right click on an *ActiveX Control* a pop up menu is displayed which provides access to a number of options.

Each control has a delete option, a properties page and the ability to set compulsory and searchable fields. Some controls also have maintenance options:



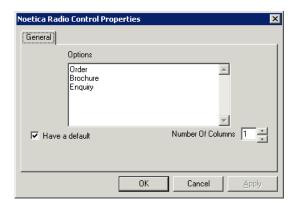
See below for a brief description of the main options available from this pop up menu.

Properties

Using the *Properties* option, the way information is presented in the control can be changed.

For example, the *Radio* control allows you to display the buttons horizontally, vertically, or in a specific number of columns and existing options can be replaced.

In our example, we have replaced the existing options of Yes and No with the options required in our campaign.



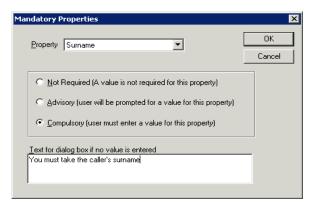


Compulsory Fields

Selected fields within an ActiveX control can be set as mandatory using the *Compulsory Fields* option. Mandatory fields are used to stop agents from moving to the next point in the callflow until they have entered all the required information to produce accurate and meaningful reports.

For example to set the *Surname* field of the Name control to be compulsory:

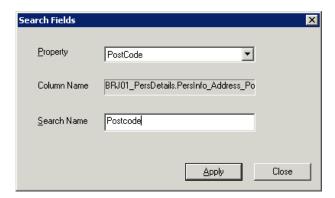
- In the Mandatory Properties dialog of the control, select Surname from the Property drop down menu
- Select the *Compulsory* option and in the text field subsequently enabled, *add a clear instruction* for the agents.



Searchable Fields

Searchable fields are used to assign a meaningful name to the data collected using the control so that more extensive searches can be carried out when in the Call Tracker. To Assign a Searchable Property to the Postcode for example:

- In the Search Fields dialog of the address control, select Postcode from the Property drop down menu
- Enter a descriptive name for the search field into the Search Name field.



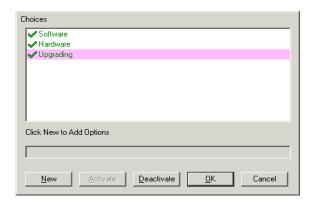


Maintenance

The *Maintenance* option is enabled when a control has links to a database. For example, the *Order* or *Combo List* controls.

The *Combo List* is set up to display different items in a list. A list may need new items inserted into it, or old items deactivated. This can be achieved through *Maintenance*. It is a way of maintaining the data associated with a specific control.

Combo List control:

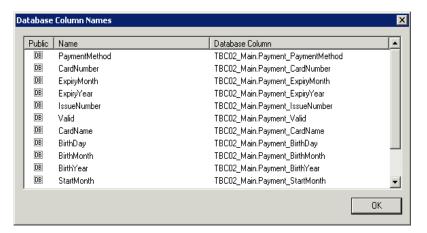


View Database Column Names

The option *View Database Column Names* allows users to check the table and column names under which the selected ActiveX control is stored in the database.

Table and column names can be passed to the reporting team, identifying the screens and controls that need to be included into the relevant reports.

The table and column names are also required when users set up *Hidden Fields* to hide certain database information, for example a credit card number, from the view of the agent when they check call details in the Call Tracker.





Hidden Fields

Hidden Fields are used to hide certain database information of Active X controls from the view of the agent when they check call details in the Call Tracker.

Hidden Fields Permissions In Synthesys Personnel

The permissions associated with *Hidden Fields* are assigned in Synthesys Personnel:

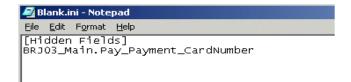
- To hide specific details from agents, the permission View Hidden Fields
 needs to be moved out of the Current Permissions box for the Agent group
 and into the Available Permissions box.
- To hide the database column name and script property name from view as well, the permission *Modify Hidden Fields* must be removed from the *Current Permissions* box for the Agent group and placed back into the *Available Permissions* window.

Entry in Blank.ini File

After the *View Hidden Fields* and *Modify Hidden Fields* permissions have been removed from the selected user or user group, the Blank.ini file in the Synthesys etc folder on the Server must be configured.

To hide for example a credit card number, we need to add the database column name for the Payment Active X control to the Blank.ini file. The database column name must include the *Table Name* and *Column Name* as displayed below.

To check the table and column name for the control either right click on the control in the screen view in the Campaign Editor or look it up in the database.



Appearance of 'Hidden Fields' in the Call Tracker

When agents access the Call Tracker, any 'hidden' information entered in the Blank.ini file can't be viewed by agents without the 'View Hidden Fields' permission.

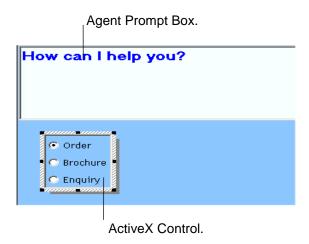
In our example, we have hidden the credit card number from view.





Agent Prompt Box

When an *ActiveX Control* is selected within the *Screen Design Area*, the *Agent Prompt Box* becomes active:



Text prompts entered in this box assist agents during a live call.

The text that is entered is usually the question that should be asked, by the agent, at that moment within the callflow. Alternatively, it may be to offer supporting advice, such as 'Don't forget to offer caller the Spring promotion!'

The appearance of the text within the *Agent Prompt Box* can be changed using the *Editing Toolbar*.

Using *Calculation Substitutions* you can also include information that has been recorded in a previous screen of the callflow as part of the agent prompt. You may, for example, include the caller's name or an item they have ordered.

For more information about Calculation Substitutions, please see the next page.



Using Calculation Substitution

Substitution takes an item of information that has been recorded in one screen of a Callflow and inserts it within the current *Agent Prompt Box*. Calculation substitutions help to personalise the conversation and to build a relationship between the customer and the company, as well as giving vital information to the agent. It presents an image of professionalism as customers feel that the agent is helpful and attentive

For example, using the *Noetica Name Control*, a caller's name is recorded, i.e. Mr Jones. This name can then be inserted into the text accompanying a closing statement, such as '*Thank you for your order Mr Jones*'.

Substitution can also be used to perform more complex events, such as calculations. These calculations can be used to quickly inform a caller of their total sales order, i.e.: sales order value, plus any VAT and delivery charges.

To perform a substitution you need to know where in the callflow the information that you want to use is kept. Three sets of information are required:

- The name of the screen in which the information was recorded
- The name of the control that captured the information within the screen
- The name of the property within the control that contains the specific item of information you wish to use in substitution.

The names are case sensitive and can be found by highlighting the appropriate control within the *Screen View*.

For an example of a calculation substitution see next page.



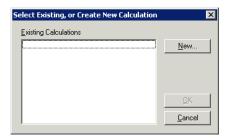
NAME SUBSTITUTION

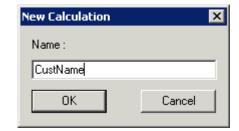
To create the substitution, click your right mouse button in the agent dialogue box and select *Insert Calculation*.

Which product would you like to order



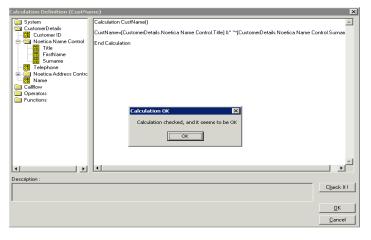
- In the Select Existing or Create New Calculation window, click on the **New**.. button.
- Enter a name of your calculation into the *Create New Calculation* window, i.e. *CustName* and click OK.





- In the *Calculation Definition* window, select and open the folder that contains the screen used to collect the caller's name.
- Double click your left mouse button on 'Title' to move the information into the right-hand side window.

Next, add a space using &" "& on the keyboard and then double click on the Surname to move the surname substitution into the window on the right-hand side.



Check your calculation by clicking the *Check It* button.

Next click OK to enter your substitution into the agent dialogue box.

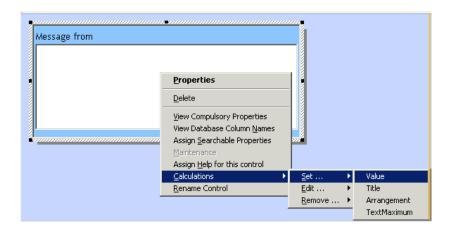
Enter the remainder of your agent dialogue as required. Remember to **Save** and **Publish** your callflow before testing your substitution in the **Agent** view.

Which product would you like to order <<CustName>>



Placing Substitutions into Controls

To bring forward information collected in one control and place it into another control, right click on the latter control and select Calculations - Set - Value.



Click on the NEW button in the Select or Create Calculation window.

Enter a name for your calculation and move the required information from the folder on the left into the right-hand side of the *Calculation Definition* window via a double left mouse click.



DEFINING BRANCHING

Decision points and the associated branches will determine the flow of the call.

A decision point can, for example, be based on the Noetica Radio control. The path through the call will change depending on the option a caller selects.

To add a branch the Decision tool is selected from the Tools toolbar in the *Main Flow* of the Campaign Editor:

- Move your cursor so that it is positioned on the line after the screen that contains the information on which you wish to branch.
- Click your left mouse button to add the decision point.
- The Select Value for Decision window is displayed.



An icon representing the Request screen, along with a - sign is displayed at the top of the window.

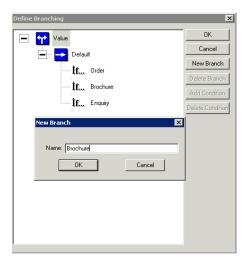
- Click on the
 ∃ sign to display the controls within the Request screen.
- Click on the ⊕ sign next to the *control option, also called Request* and then select *Value*:

Click on OK, to add the decision point to the *Flow View* at the Campaign Editor main screen.



To display the *Define Branching* window double click on the decision point.

- Click on the Value option at the top of the window and then New Branch to display the New Branch dialog.
- Enter a descriptive branch name and click Ok to create the branch.
- Select New Branch again and create further branches, as required.

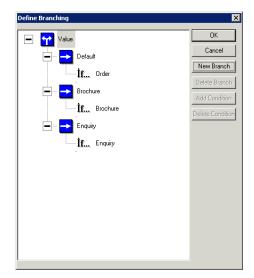


In our example we have created a brochure and an enquiry branch.

We keep the If...Order option on the Default branch, as this represents the main table for the campaign in the database and because for the order request we need to ask the most questions.

The If...Brochure and If...Enquiry options however need to be moved into the appropriate branches.

- Click your left mouse button on the *If...Brochure* value, hold down the mouse button and drag it down to the *Brochure* branch. Release the mouse button to place the value under the selected branch.
- Next, click and hold down your mouse button on the If...Enquiry value and drag it down to the Enquiry branch.



Click OK to return to the *Main Flow* and to display the new branches in your callflow.

Return to the Main Flow and save wour callflow.

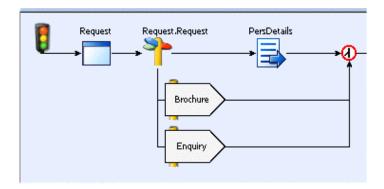


CREATING SUBFLOWS

Subflows are miniature callflows used if a particular sequence of screens is repeated more than once in different branches.

A subflow could, for example, contain information regarding a caller's personal details or employment or it could contain information around available payment methods.

- Left click on the subflow icon
 on the Tools toolbar.
- Move the subflow to the required position in the callflow and click the left mouse button to display the subflow name dialog.
- Enter a short descriptive name and click OK to add and display the subflow.



• Double click your left mouse button on the subflow to enter it.

The subflow view is almost identical to the main callflow view except that the default branch inside a subflow displays a blue end flag to allow a return to the main flow.

Any screens and controls can now be placed inside the subflow in the same way as they are added to the Main Flow.



To return from the subflow to the main flow, click the *Main Flow* icon on the *Callflow Editor* toolbar.



Reusing existing Subflows

To increase the efficiency of callflow design, it is possible to pick up and place an existing subflow on other branches within the callflow should the same set of questions be required at this point.

When picking up an existing subflow we reuse the existing underlying database table for that subflow and therefore any changes made to one of the subflows will automatically be reflected in the others.

In our example, we want to ask the questions contained in our PersDetails subflow on the Brochure branch of the Callflow.

- To reuse the existing *PersDetails* subflow, pick up a new subflow icon from the *Tools* toolbar in the *Campaign Editor* main screen.
- Place it on the Brochure branch
- Select the existing subflow PersDetails, from the drop down menu and click OK.



To check the content, double click on the subflow to open it. Return to the main callflow.

Copying and pasting existing Subflows

Another way of utilizing existing subflows is the copy and paste option.

When copying and pasting a subflow, you will be asked to rename every screen and every branch within the subflow.

This way, you will create a new database table for the copied subflow.

Both subflows will initially contain the same information, but any changes made to one will no longer be reflected in the other.



WEB STYLE HELP PAGES

Context-sensitive help pages can be created using any Web Page/HTML Editor, to offer additional support and advice to agents when taking calls. For example, you could create and assign help pages to an *Order Control* showing product listings and examples of the products that are available.

Text, graphics and sound can all be included within the help pages. Furthermore, the help facility can be extended to allow direct access (via hypertext links) to the World Wide Web, or company Intranet.

The assigning of web page help to a particular area of a callflow takes place within the *Screen View*.

• To create a web style help page, click on which is located on the Callflow Editor Toolbar.

The following window is displayed, which allows you to select the item to which you want to assign the web style help:



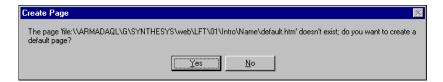
This Account	If you assign help to the account, the help will be available for all Callflows that are created for the account.
This Campaign	If you assign the help to the whole campaign (Callflow), the help page will be available at any point during a call.
This Section	If you assign the help to the currently displayed screen, then the help will only be available to an agent when working in that screen.
This Control.	If you assign the help to the currently selected control then the help will only be available when an agent is entering information into that control.



After a selection has been made, click ______.

If this is the first web page you are creating for the selected account, callflow, section or control, then you are asked whether you want to create a default page.

For example:



Click to display the *Web Help Picker* window. From here you can access your HTML editor to modify the default page as required.

When web pages have been created they are automatically saved to the central server.

- Click Edit Help to open your Help Page Editor, create and save your Help Page.
- Exit your Help Page Editor and remember to click Refresh page back in the Web Help Picker window, to update your Help Page.





GLOBAL BLOCKS

In the Callflow Editor, you can use Global Blocks, if you wish to re-use an existing screen or subflow in a number of different callflows. You can in effect design a 'template' subflow (or section), containing all the questions, screens and branches related to a specific topic, i.e. employment or payment details, and then save it to the Global Gallery.

To use the information in different campaigns, simply pick up the subflow (or section) from the Global Gallery and add it to the relevant callflow. Any changes that you subsequently make to the subflow (or section) will only be reflected in the new callflow, not in the template still in the Global Gallery.



When saving a **CRM** to the Global Gallery however, any changes made to the CRM will affect the original CRM table, unless you save the CRM under a new prefix (CRM Maintenance – Save As), after adding it to a new callfow.

Saving items to the Global Gallery:

- Select the screen, subflow or CRM that you wish to save to the Global Gallery, and click the *Copy Global Block* icon on the *Callflow Editor* toolbar.
- Enter a name for the selected item into the 'Enter file name ...' window and click OK.

Picking up items from the Global Gallery:

- Open the destination callflow and pick up the *Insert Global Block* icon from the toolbar.
- Select the required screen, subflow or CRM in the *Insert Global Block* window, then click OK to add the item to your callflow.



If your callflow already contains a section/ branch with the same name, you will be prompted to rename every duplicate instance, before you can paste it into the callflow.

Deleting Global Blocks

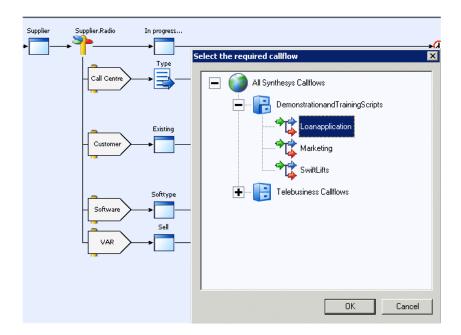
Global Blocks can be deleted from the Gallery in the Synthesys Campaign Manager.

- Go to Setup Reports, to open the Synthesys Campaign Manager.
- Select *View* on the menu bar, and then *Show Global Blocks*, to open the *Global Block* dialog.
- Here, select the item(s) that you wish to delete, then click the **Delete** button.



POPSCRIPTS

Using the Popup script icon on the Tools toolbar, you can insert another callflow into the callflow that you are currently working on.



When taking a call, agents will initially take information on the main callflow.

At the appropriate point, the embedded callflow will be popped; the agent will run through the pop script to collect the relevant details after which the call will return to the main callflow.

The pop script can be used most efficiently in conjunction with the Symbol Table control, as the Noetica Symbol Table control enables users to display data captured in a main callflow, within a pop script.



To enable agents to launch the Popup script when taking calls, please ensure that the main callflow and the Popup script is in their Team.

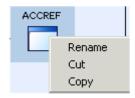
To send HTML emails from within Popup scripts you need to tick the checkbox "Run from Inner Popflow", when setting up your HTML Email in the Campaign Manager, via Setup - Reports.

For more information regarding the Symbol Table control, see the section Noetica Active X controls in the appendix of this document.



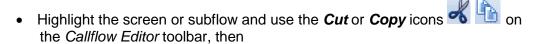
CUTTING, COPYING & PASTING OPTIONS

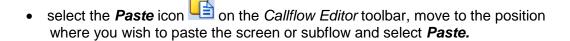
When designing or editing your callflow you may want to cut, copy and paste a selected screen or subflow. To do this, either:



- Right click on the screen or subflow and select *Cut* or *Copy* then
- move to the position where you wish to paste the screen or subflow, right click and select *Paste*

Or

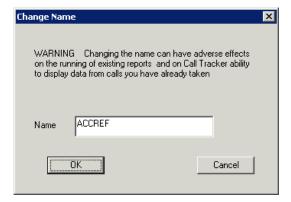






When you copy a screen, the **Change Name** window will open, prompting you to rename your screen before you can paste it.

When you copy a subflow you have to rename each screen and branch name contained within the subflow, before you can paste the subflow into your callflow.





You do not need to rename a screen or subflow when you Cut and Paste it within a callflow.

You will be unable to cut and paste a screen or subflow if there are decision and branches based on the selected screen or subflow.

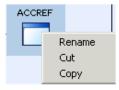


RENAMING SCREENS AND CONTROLS

When adding or renaming screens you must notify the person responsible for setting up your reports, as they will have to be updated to display the required information.

Renaming Screens

To change the name of an existing screen, right click on the screen to open the *Rename Block* window.

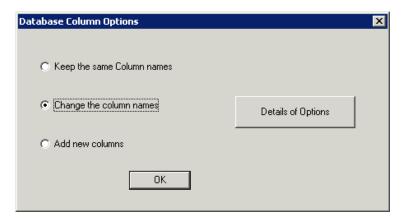


In the *Change Name* window type in the new name for your screen, then click OK.



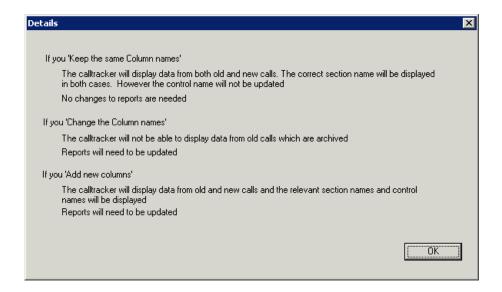
In the *Database Column Options* window, select whether you wish to 'keep the same Column names', 'change the column names' or wish to 'add new column names'.

For explanations regarding the choices click the *Details of Options* button.





DETAILS OF OPTIONS



KEEPING THE SAME COLUMN NAMES

- If this option is chosen all information taken during a call prior to the name change will be displayed under the original screen name in the Call Tracker
- Information taken after the name change will be displayed under the new screen name.
- No changes are required in your report set up.

CHANGE THE COLUMN NAMES

- Only information taken under the new screen name can be accessed in the Call Tracker.
- If you change screen names you have to replace the old column names with the new column names in your report folder.

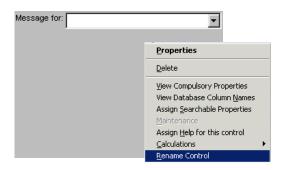
ADD NEW COLUMN NAMES

- As with the first option you can access information from calls taken prior to the name change (under the original screen name) and information taken after the name change (under the new screen name).
- However, you have to add the new column names to your report folder.



Renaming Controls

To change the name of an existing control, right click on the control and select *Rename Control* from the drop down menu.



As with renaming screens, the *Change Name* window will be displayed. Type in the new name for your control and click OK.

Next select whether you wish to keep the same Column names, change the column names or add new column names in the *Database Column Options* window.

KEEPING THE SAME COLUMN NAMES

- All information taken during a call prior to and after the name change will be displayed under the original control name in the Call Tracker.
- No changes are required in your report set up.

CHANGE THE COLUMN NAMES

- Only information taken under the new control name can be accessed in the Call Tracker.
- If you change the control name you have to replace the old column name with the new column name in your report folder.

ADD NEW COLUMN NAMES

- As with the first option you can access information from calls taken prior to the name change (under the original control name) and information taken after the name change (under the new control name).
- However, you have to add the new column names to your report folder.



NEW CONCLUSIONS & CALL RESULTS

Whenever you complete a branch, having taking all relevant information, you may wish to add associated conclusions, together with the appropriate call result to distinguish the nature of the calls.

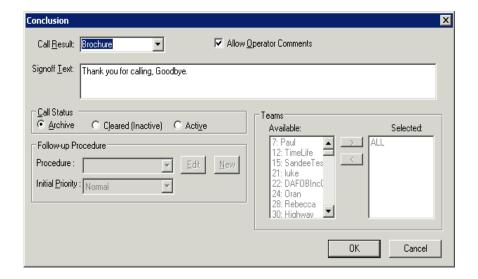
A call may for example have different branches for 'Order', 'Brochure Request' and 'General Enquiry'.

Pick up a New Conclusion icon from the Tools toolbar and place it onto the appropriate branch.

Double click you left mouse button on the conclusion to open it and enter a suitable name into the Call Result field, i.e. *Brochure*.

Add any signoff text as required into the Signoff text box bellow and click ok.

You can also add a text substitution as part of the dialogue in the Signoff Text box.





TAKING A TEST CALL

Taking test calls, users can check the callflow structure to ensure that the right questions are asked and the appropriate information is collected at each point in the campaign, depending on the caller's requirements.

To run a test call, click on the *Test CallFlow* icon on the Callflow Editor toolbar in the Main Flow of the Campaign Editor.

Alternatively you can Publish your callflow to broadcast it around the Network and then take a call in the Agent view.



IMPORTING EXISTING CALLFLOWS

Importing callflows means that you can design and release a callflow on one machine (e.g. Laptop) or Network, then copy it onto another machine/network by importing the relevant pht.file.

- To import a callflow into a new campaign, you have to set up a separate callflow on the recipient machine/network and release it firstly before the importing, then after importing.
- To override an existing callflow, simply open that campaign, import the relevant callflow and release it to replace the existing callflow.
- Before you import a callflow, have a look at the callflow that you wish to copy in the Campaign Editor. If it contains any database dependant Active X controls (such as the Combo List, CRM or DBTable controls, then the data behind the controls will be lost because importing does NOT copy over the database tables as well. You will have to re-enter this data in the maintenance of the control.
- However, you can export and import the data in the tables rather than copying the data down, then inputting it back into the newly imported callflow.

IMPORTING CALLFLOWS

To import an existing callflow, select *Maintenance* on the *Tools* toolbar in the Campaign Editor.

- Click on Import .PHT file.
- A message will inform you that this will override the existing callflow.
- Click **Yes** to confirm that you wish to replace the currently open callflow with the callflow you are about to import.

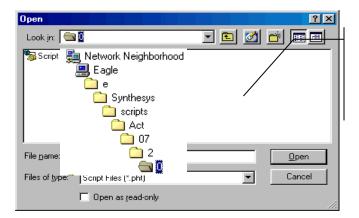
In the Open dialog now displayed, you need to locate the callflow that you wish to import.

Please see next page for more information.



Locate the callflow you wish to import in the relevant directory:

Server\Drive\Synthesys\Callflows\prefix\CampaignNo\Latestversion\0\Script.pht



In our example, the callflow is located at:
Eagle\\e\Synthesys\scripts\
Act\07\2\0\Script

A Tree hierarchy exists

- Account Prefix (i.e. the prefix you gave the account during initial design)
- Callflow campaign number (i.e. a single account can have several campaigns)
- The major versions of each callflow Every released version of a particular callflow is kept in its own directory.
- The minor versions of each callflow –Version 0 is the released version of a callflow (and the one you should copy), version 1 is the saved version of a callflow.



Always copy the latest released version of a callflow because then you will know exactly what to expect. The latest version is the one with the highest directory number.

If you are uncertain about which campaign number the callflow you wish to copy is, then open the callflow in the Campaign Editor, and look at the top of the screen – where you will see the account and campaign names, the prefix and the release version.

When you double click on Script. PHT a message will be displayed informing you that Database style controls may have lost their data, which needs to be re entered.

Click OK to import the callflow and then release the callflow before taking a call in the Agent Workstation.

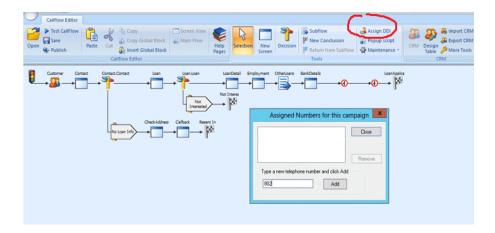


ASSIGNING DDI TO INBOUND CAMPAIGN

Assigning a DDI (Direct Dial In) allows Inbound calls for the campaign to be routed to specific agents, and on answering the call, enables the automatic screen pop of the associated callflow.

The **Assign DDI** option is used to add, modify and delete a DDI number for the selected campaign.

- Left click on the Assign DDI icon on the Tools toolbar.
- Enter the DDI to be used for the selected callflow into the 'Type a new telephone number' field, then click the Add button to add and save the number.
- To remove an existing DDI number, select the DDI that you wish to remove and click the *Remove* button.



If the DDI that you enter has already been assigned to another callflow, a message will inform you that the number is already used by another account/ campaign.



• Click **Yes**, to **re-assign** the DDI to the current callflow, click **No**, **t**o assign the DDI to both campaigns, or **Cancel** the action.



If multiple DDIs are assigned to the one campaign, the associated callflow will pop to the agent screen. If the same DDI is assigned to more than one campaign, agents need to select the appropriate callflow from the list of available campaigns displayed.

The DDI number that you need to enter depends on the configuration of your telephony system, so please ask your System administrator, or take a look at the document 'Capturing DDI by Prompt control and Calculation'.