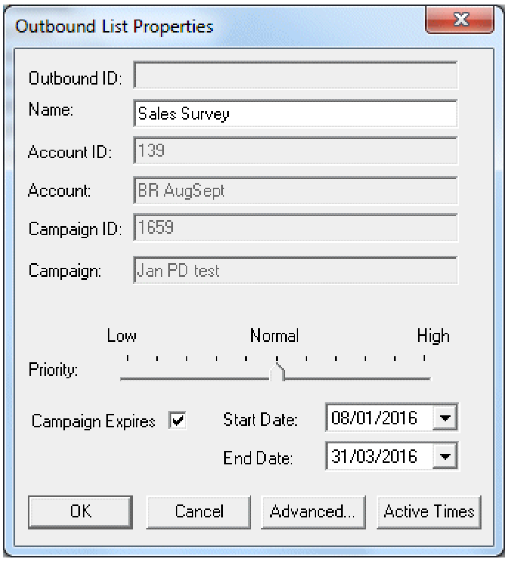
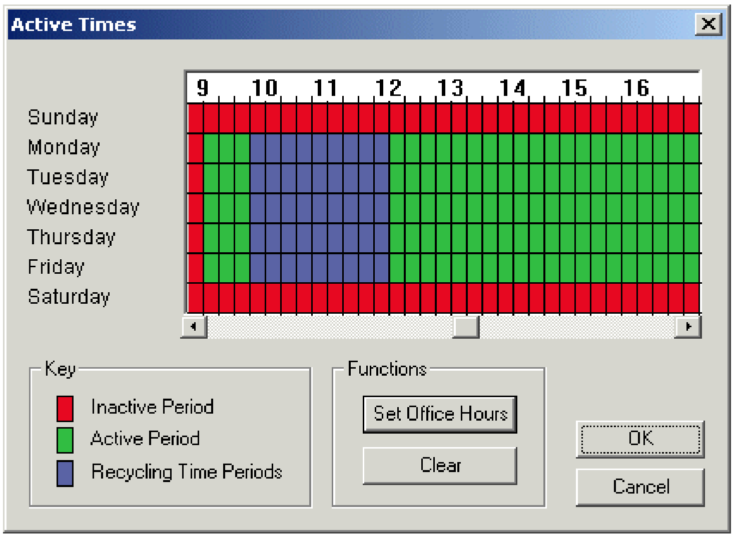
SYNTHESYS OUTBOUND

Adding Outbound Lists



Setting Active Times



SYNTHESYS OUTBOUND MANAGER

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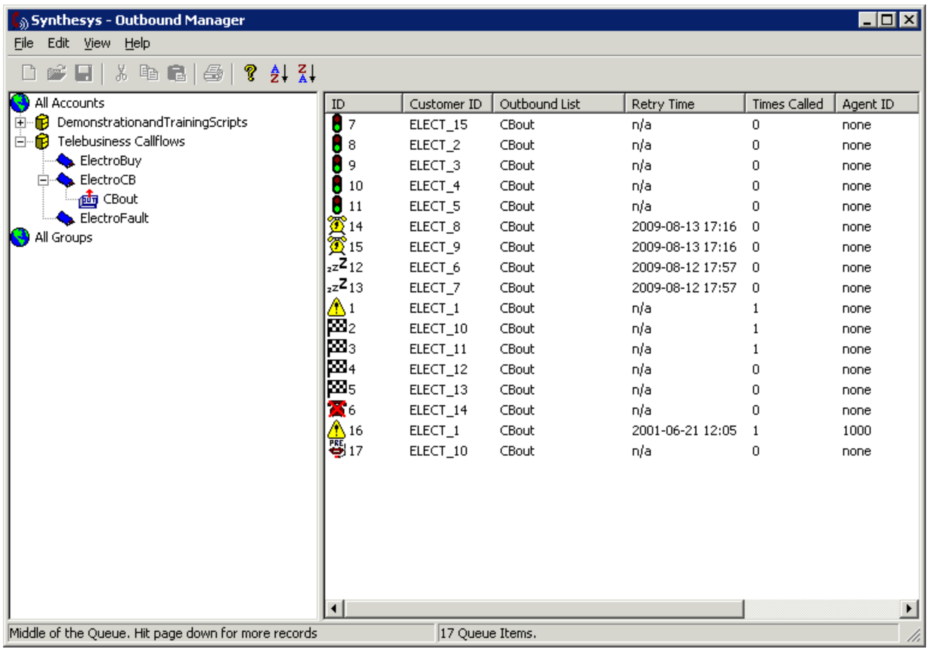
THE OUTBOUND MANAGER MAIN SCREEN

In the Outbound Manager you can attach preview, predictive, SMS and Email Outbound lists to any campaign that has been assigned CRM (Customer Relationship Management), and you can specify the date and time frame during which the call should be taken and by which agents.

A priority can be assigned to the outbound list and lists can be activated and deactivated at any time, as required.

To view a list of all client accounts and campaigns set up in Synthesys

- Open the Synthesys ***Outbound Manager.***
- Double click on the ***All Accounts*** icon in the left-side window and click on the plus sign next to the desired account to display the campaigns for that account.
- To display inactive Outbound lists, as well as active Outbound call lists in the tree structure, select the ***Display Inactive OBCampaigns*** option via the *View* menu of the Outbound Manager.



A **blue book** next to a campaign shows that this callflow contains Customer Relationship Management.

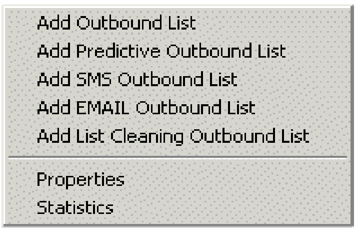
A **red book** is displayed if the campaign does not contain a CRM.

You can only attach an Outbound list to a callflow that has been assigned Customer Relationship Management.

ADDING PREVIEW OUTBOUND LISTS

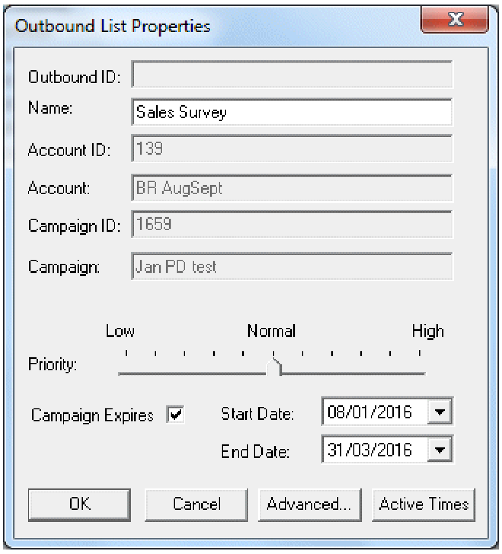
To add a preview outbound list:

- Right click on your campaign in the **Outbound** Manager and select ***Add Outbound List*** from the drop down menu.



- In the ***Outbound List Properties*** page now displayed, enter a name for the Outbound list into the *Name* field.

Account and campaign details are displayed automatically.



- Tick ***Campaign Expires*** if you wish to select a *Start Date* and *End Date* during which to run the outbound list.

- Use the slider to assign the level of priority for the outbound list.

- Click **OK** to attach your outbound list and ***Yes*** to activate the list.

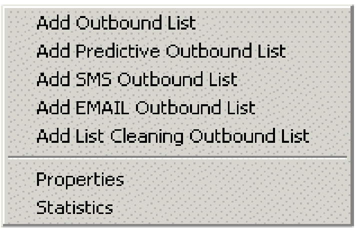
Please see the section **Setting Active Times** for information about setting the time periods for presenting queued calls to the agents.

See the section **Advanced Options for Outbound lists** for information about available settings to customise the way Outbound calls are presented to agents.

ADDING PREDICTIVE OUTBOUND LISTS

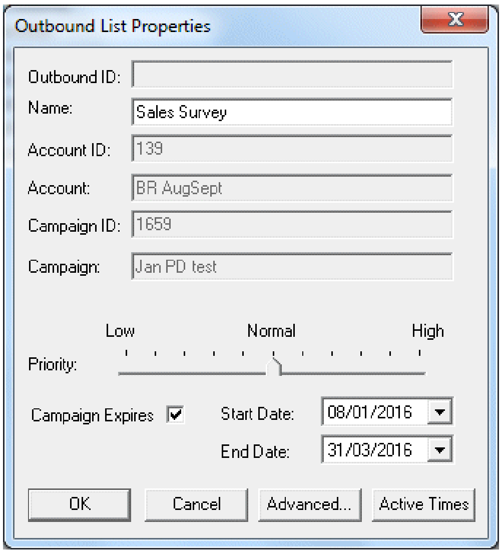
To add a predictive outbound list:

- Right click on your campaign in the **Outbound** Manager and select ***Add Predictive Outbound List*** from the drop down menu.



- In the ***Outbound List Properties*** page now displayed, enter a name for the Outbound list into the *Name* field.

Account and campaign details are displayed automatically.



- Tick ***Campaign Expires*** if you wish to select a *Start Date* and *End Date* during which to run the predictive outbound list.
- Use the slider to assign the level of priority for the outbound list.
- Click OK to attach your outbound list and ***Yes*** to activate the list.

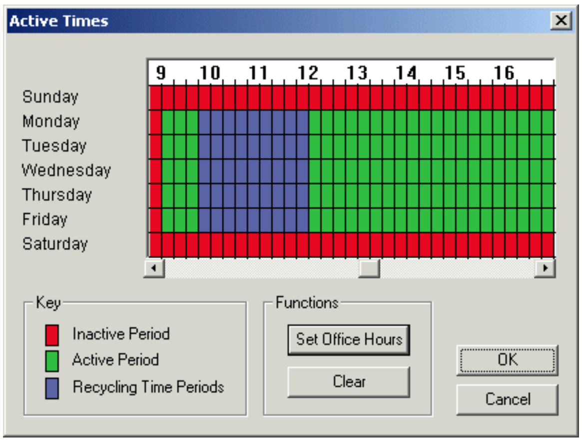
Please see the section **Setting Active Times** for information about setting the time periods for presenting queued calls to the agents.

See the section **Advanced Options for Outbound lists** for information about available settings to customise the way Outbound calls are presented to agents.

SETTING ACTIVE TIMES

In the Active Times window you can specify the time period during which the Outbound calls for the campaign should be taken:

- Click on the **Active Times** tab in the *Outbound List Properties* window.
- Click **Set Office Hours** to activate calls from Monday to Friday between 9.00am - 5.30pm.
- To select different time periods, move your mouse pointer to the required cell and drag the pointer from left to right, to the desired time slot.
- Click OK to confirm the active times for your outbound list.



To ***deactivate selected time periods*** click your right mouse button and drag the pointer from left to right, to the desired time slot.

To deactivate all active time periods click the 'Clear' button.

Red Cells	Display the inactive times
Green Cells	Display the active times
Lavender Blue	Displays Time Periods allocated in the Recycling Designer

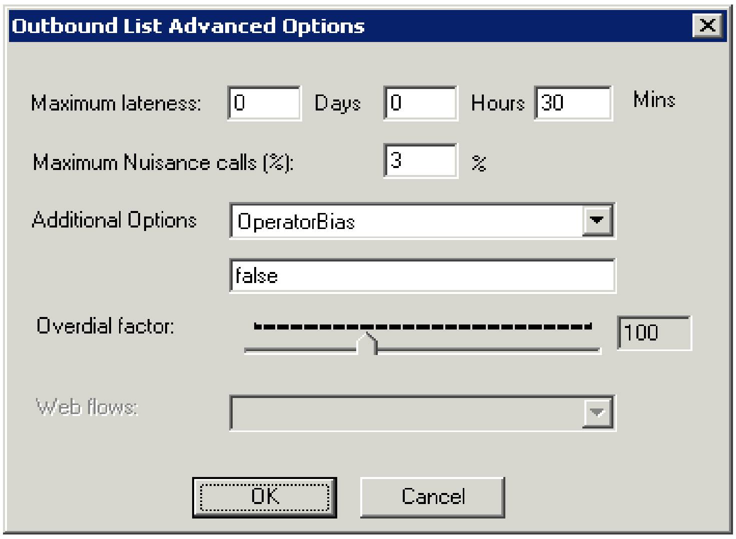
Default **Active Times** are set from 09:00 to 17:30. These settings can be changed in the Synthesys.inf file. Please ask your System Administrator, or contact Noetica for more information.

Time Periods allocated in the Recycling Designer (shown as Lavender Blue) need to be cleared in the Recycling Designer selecting the relevant Time Period and then clicking the 'Clear' button.

ADVANCED OPTIONS FOR OUTBOUND LISTS

In the Outbound List Properties dialog:

- Click the **Advanced** button, to open the *Outbound List Advanced Options* window.
- Set ***Maximum lateness*** to specify the time range in which rescheduled calls will be re-presented to the agents.
- For predictive Outbound lists you can also specify the maximum level of nuisance calls in %.



- ***Over dial factor***: Moving the slider (default setting 100%), the amount of over dial for predictive OB campaigns can be increased or decreased.

Please see next page for information about additional available Outbound property settings, available via the ***Additional Options*** drop down menu.

ADDITIONAL ADVANCED OUTBOUND LIST OPTIONS

Available Options	Use
Answer machine detection	True/ False. Turns on/ off Answer Machine Detection, providing the switch supports AMD.
AutoDialDelay	The number of seconds that the Auto Dial should be delayed, after the script pop.
Cli to present	The telephone number that will be shown on the customer phone when receiving the call.
CLIToPresentOnTransfer	Enter "**CustomerNumber"** as a string, to display the customer number the Switch has called
CallBackMaxDaysFromToday	The number of days, from selection (current date +N), for which call-backs can be rescheduled at run time. If agents select a later date, a message showing the latest possible date (YYYY/MM/DD) for selection is displayed.
CallBackActiveTimesOnly	True/ False. Enter True to specify that call-backs can only be rescheduled within an OB lists active time periods. If the day/time selected does not pass validation, agents will see the message 'you must reschedule this call during campaign active times'.
DedupeQueueOnTelephone	True/ False. If set to *True* a duplicate check will be carried out on the Queue table to ensure that when queuing new records, no duplicate telephone numbers will be added to an Outbound list. Instant call-backs will be queued as before.
Dial Preference	Enter ***Sleeping, Queued*****, or** ***Both*** to determine if due sleeping or queued calls should be dialled first, or if a mixture of both should be presented to agents in order of their QueueID. ***Deactivate and re-activate*** the OB list to refresh the internal PD dialling list.
Dial Prefix	Enter the dial prefix used to dial out (e.g. 9).
Dial Order	Instruct the dialler in which order to retrieve queued items. Enter ***ReverseID*** if new Queue items should be presented to agents before old Queue items. Enter ID, to present older queued items before the newly queued calls. ***Deactivate and re-activate*** the OB list to refresh the internal PD dialling list.
Idle Timeout	Specify in seconds (i.e. 15), the time for the automatic screen pop of the next preview record. By default, no Idle Timeout is set and agents need to click the *Get Next Record* icon at run time to request the next preview call.
ListCleaningLinesToUse	The number of calls to be made concurrently by the dialler on a list cleaning campaign (ensuring the number is lower than the actual lines in use, depending on the lines\trunks available).
ListCleaningSwitchToUse	The switch name, if List Cleaning is used in a multi switch environment.
MaximumNextCallLateness	Specify in minutes the maximum lateness by which ***calls requested via the Call Diary*** (Call Next) should be presented to the agent, before they will be recycled as missed latest time.

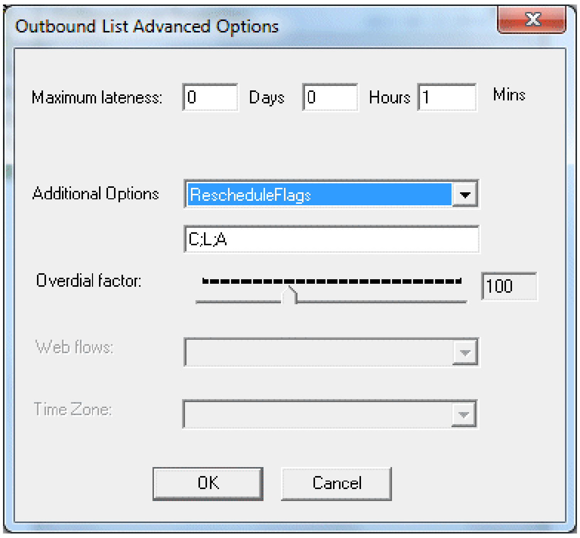
Available Options	Use
MinCallsBeforePredictive	Enter the minimum number of calls to be dialled for this campaign, before predictive dialling starts, max is 99.
No answer timeout	The number of seconds the Switch allows the call to ring, before dropping it as no answer.
Operator Bias	**True or False**. If true, rescheduled calls due will only be presented to the agent that scheduled the call, if false, rescheduled calls will go to any agent.
Priority Order	Enter ***None, Asc* or *Desc*** to specify the order in which to present priority calls. Entering ***Desc will present calls with higher priority settings first. Deactivate and re-activate*** the OB list to refresh the internal PD dialling list.
Rescheduled Flags	Enter ***C.L.A*** and/ or **P** to determine how the **Reschedule dialog** is presented to agents when aborting p*review* or p*redictive* outbound calls. Enter: **C**, to display all CRM numbers to the agent. **L**, to display the last number dialled to the agent. **A,** to allow the agent to enter a new telephone number, and **P,** to sleep, rather than reschedule the call, to enable predictive calling, rather than re-presenting the call in preview mode.
RescheduleSelectDefault	**True/ False**. If set to True, will pre-select a Default telephone number in the Reschedule abort dialog at run time, providing the Rescheduled flags OB property contains the 'L' option.
Use do not call list	**True/ False**. If True, allows Synthesys to check the telephone numbers in the **PHOENIX_DoNotCallList** table and to remove associated records from the Outbound call list.
UseMaxLatenessOnSleeping	**True/ False.** Set to True to set a latest re-try time for presenting sleeping calls at run time. If not presented, they will go to advanced recycling rules as missed latest call.
UseGlobalDNC	**True/ False.** Turned on by default for all outbound lists, to enable the PD to check entries in the Phoenix_DoNotCall table, to determine whether or not to make a call.
DNCScope	Used by the PD to decide which record to insert into Phoenix_DoNotCall in response to an abandoned/ nuisance call or answering machine (when using AMD). The default DNCScope is set to **Entity (CRM Prefix).** To override, you can enter **Global** to block the call Globally (Call Centre wide), or to block the call for a particular customer id, list, campaign or workspace (account), enter either **Customer**, OR **List**, OR **Campaign** OR **Workspace**.

If you are using the Synthesys Switch, please take a look at the module document **Noetica Voice Platform** for a description of additional Outbound list properties.

Please also take a look at Reschedule Flags on the next page, and the ***Use Do Not Call List*** section.

Reschedule Flags

Reschedule Flags are set up in the ***Advanced*** properties dialog of an outbound list to determine how the *Reschedule* dialog is presented to agents when ***aborting*** *preview* or *predictive* outbound calls.



Setting up Reschedule Flags

Using the Reschedule flags ***C; L; A,*** separated by a semicolon, you can configure the Reschedule dialog:

Flag	Description
C	Display all CRM numbers to the agent
L	Display the last number dialled to the agent
A	Allow the agent to type the number, rather than limiting choice to the list formed above
P	Instead of rescheduling the call to the time selected, it will be 'slept' which will enable predictive calling, instead of a preview call

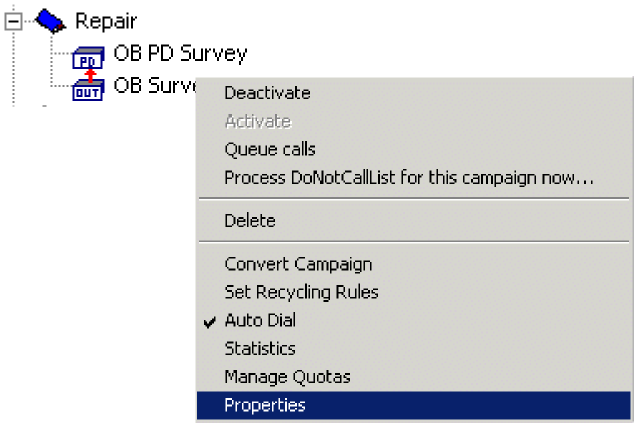
The order of C and L in the Advanced properties dialog determines the order in which the telephone numbers are displayed in the Reschedule dialog, i.e. if L is entered before C, the last number dialled is shown at the top of the list.

If you simply enter the flag L, agents in Take Calls will merely see the last number dialled, without being able to select or enter any numbers.

Changing Advanced Options & Active Times

To view or change any of the settings if and when required:

- Open the *Outbound Manager* selecting Outbound under the Setup heading in the Synthesys main screen.
- Locate and right click on the ***Outbound List***.
- Select ***Properties*** from the drop down list.



This will open the ***Outbound List Properties*** window. Click the

- ***Active Times button*** to set or edit active times for the Outbound list
- ***Advanced*** button to specify maximum lateness for rescheduled calls, Operator bias or Dial prefix or other options, as required.

SETTING UP SMS OUTBOUND LISTS

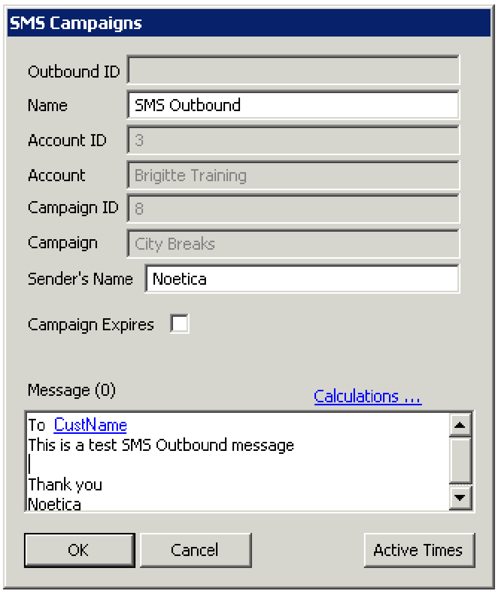
SMS outbound lists are used to send bulk SMS to customers. This functionality can also be used as part of a full contact strategy. For example, customers could be called three times and then they could be sent an SMS, followed by an email.

To send **bulk SMS** you need to set up a separate **SMS Outbound list.**

When setting up an SMS Outbound list you must ensure that the CRM for this Outbound list includes a telephone field containing the customer's mobile number.

In the Outbound Manager:

- Right click on your campaign and select ***SMS Outbound List*** the drop down menu.



Enter a name for your SMS Outbound list

Enter the name of the Sender

Enter your SMS message, including a calculation with details captured in the CRM fields.

To cut and paste word documents into the message page use the keyboard command ***Ctrl + V.*** The text must not exceed 150 characters, including the text used in your calculation, which is not registered in the Message () count.

Queuing Customers for an SMS Outbound list

All customers for your SMS Outbound list now need to be **queued on** the telephone field containing their **mobile number**.

Providing that the **SMS Outbound list** is **active**, an **SMS message will be sent** automatically to all customers in the active queue and to customers where the sleeping time has expired and action is due.

To set Active Times, please refer to the section **Setting Active Times**.

To use SMS Outbound lists as part of a full contact strategy, you can set up your recycling rules in the Recycling Designer.

SETTING UP EMAIL OUTBOUND LISTS

Email Outbound lists are used to send bulk Emails to customers. This functionality can also be used as part of a full contact strategy. For example, customers could be called three times and then they could be sent an SMS, followed by an email.

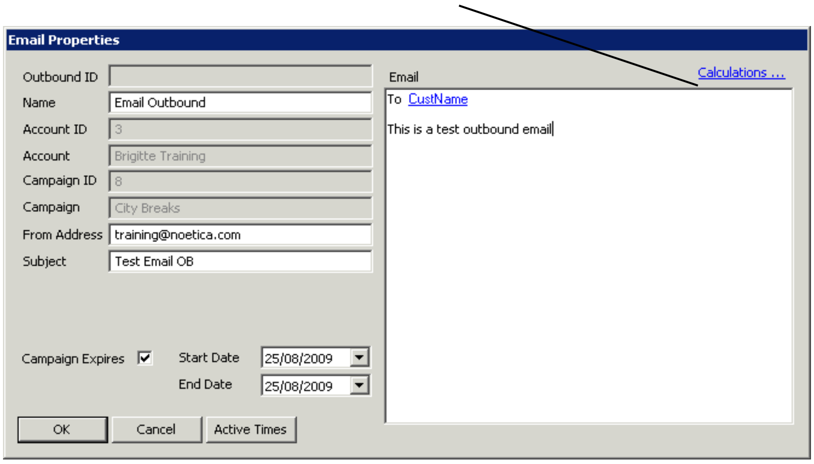
To send **bulk emails** you need to set up a separate **Email Outbound list**.

When setting up an Email Outbound list, you must ensure that the CRM for this Outbound list includes an Email field containing the customer's email address.

In the Outbound Manager:

- Right click on your campaign and select ***Email Outbound List.***
- Type the required text into the *Email* message page or paste a word document or html code into the message page using the keyboard command ***Ctrl + V.***

The email text can include calculations using information captured in the CRM fields.



Queuing Customers for an Email Outbound list

All customers for your Email Outbound list now need to be **queued on** the **telephone field** containing their **email address**.

Providing that the **Email Outbound List** is **active**, an email will be sent automatically to all customers in the active queue and to customers where the sleeping time has expired and action is due.

To set Active Times, please refer to the section **Setting Active Times**.

To use Email Outbound lists as part of a full contact strategy you can set up the recycling rules in the Recycling Designer.

SMS and Email Outbound & the Recycling Designer

To use SMS and Email Outbound lists as part of a full contact strategy, set up your recycling rules in the Recycling Designer.

- Use the ***Change Telephone*** icon to switch to the telephone field containing either the Mobile number (for SMS) or Email address (for emails) and **end** the **branch** with a ***Change Campaign*** icon.

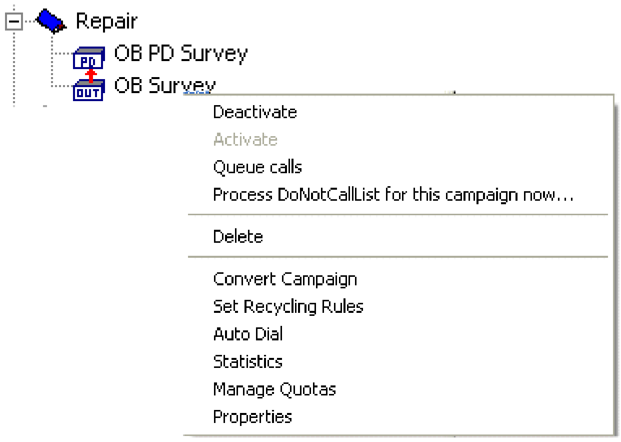
Select the SMS or Email Outbound list that you have created earlier, to place the calls in the queue of the selected list.

- To change back from an SMS or Email Outbound list to a telephone call, **drop** a **new decision** based on ***Last call result*** and select the condition SMS or Email.
- **Use** the ***Change Telephone*** icon and select the number on which to contact the customer next.
- End the branch with a ***Change Campaign*** icon and select the outbound list to which the calls should be queued.

For more information please refer to the section: ***Synthesys Call Recycling*****.**

OPTION MENU FOR OUTBOUND LISTS

When you right click on an outbound list, the drop down menu displays a range of options available.



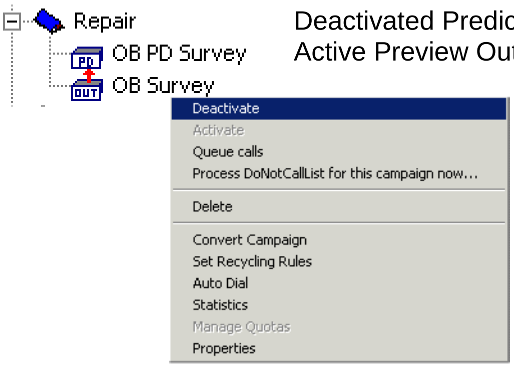
Option	***Uses To***
Activate / Deactivate	Activate the Outbound list to present calls from that list to the agents, deactivate if calls should not be presented.
Queue calls	Place customers to be called into the Outbound list.
Process DoNotCallList for this campaign now	Checks telephone numbers in the PHOENIX_DoNotCallList table and removes associated records from the outbound list immediately. To process, the option **UseDoNotCallList** must also be set to **True** in the Outbound List Advanced Options dialog.
Delete	Delete a selected preview or predictive Outbound list.
Convert Campaign	Convert a preview Outbound list to a predictive Outbound list or vice versa.
Set Recycling Rules	Set up rules for recycling to determine when a call will be presented to the agents.
Auto Dial	Tick so that the telephone number will be dialled automatically.
Statistics	View statistical information of all queued calls.
Manage Quotas	Set quota targets which need to be met, before an Outbound list is deactivated automatically.
Properties	Access account and campaign information.

Activating and Deactivating Outbound Lists

You can make outbound lists active or inactive at any time, as required:

- Right-click on the relevant outbound list and select either ***Activate*** or ***Deactivate*** from the drop down menu.

A red arrow displayed with the outbound list icon confirms that the outbound list attached is active.



Deactivated Predictive Outbound List
Active Preview Outbound List

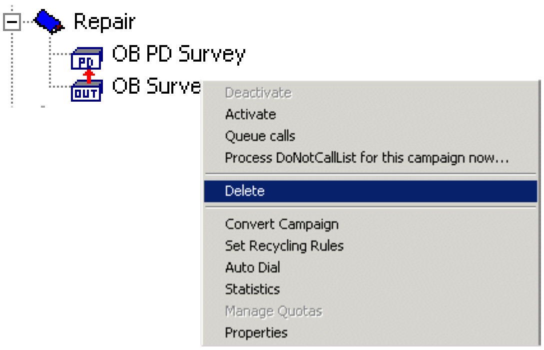
Deleting Outbound Lists

If there are calls queued for the outbound list that you wish to delete, a message will be displayed informing you that with deleting the outbound list you will automatically also delete the queued items associated.

To delete an outbound list:

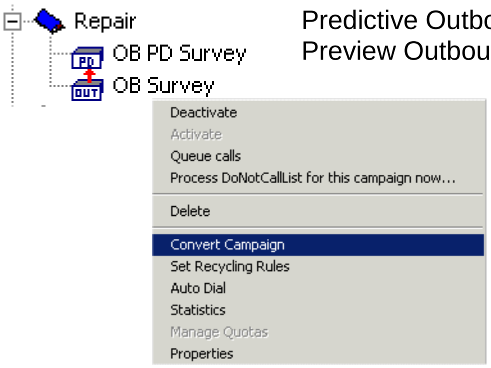
- Select ***Delete*** from the drop down menu.

- Click ***Yes*** to delete the outbound list and associated queued calls.



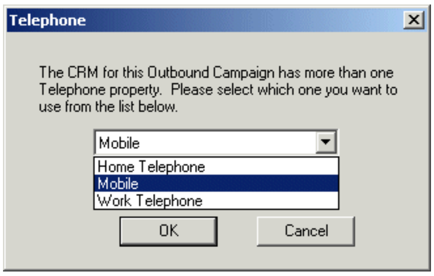
Converting Outbound Lists

It is possible to convert a preview Outbound list to a predictive Outbound list or alternatively a predictive Outbound list to a preview list using the ***Convert Campaign*** option of the drop down menu.



Predictive Outbound List
Preview Outbound List

If the preview Outbound list that is to be changed to predictive Outbound list contains more than one telephone number, you need to select the number to be dialled from the Telephone window displayed.



Auto Dial

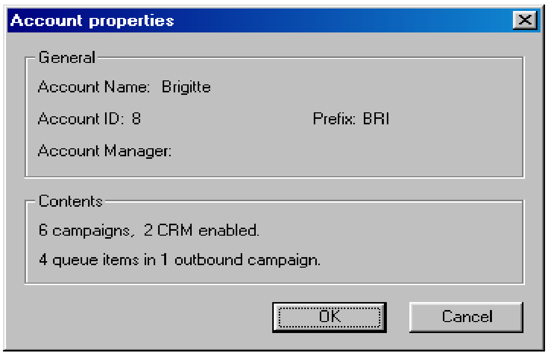
Ticking the ***Auto Dial*** option will enable the Switch to dial the customer contact number automatically, rather than it being dialled manually by the agent.

Viewing Account and Campaign Properties

To view account, campaign or Outbound list properties:

- Click the right mouse button on the account, campaign or Outbound list name.
- Select ***Properties*** to display the appropriate window.

In our example we have opened the Account properties window.



Displayed is **General** information, such as the Account Name and ID and a **Contents** section with campaign information. In our example there are:

6 campaigns for the account

2 campaigns have been assigned Customer Relationship Management.

4 calls have been placed in the queue for 1 outbound list.

Use Do Not Call List

The **Do Not Call List** feature is used to remove people from individual call lists in the Outbound Manager if they have requested to be removed, for example, by calling the *Customer Preference Service* or an In-house *Complaints* department.

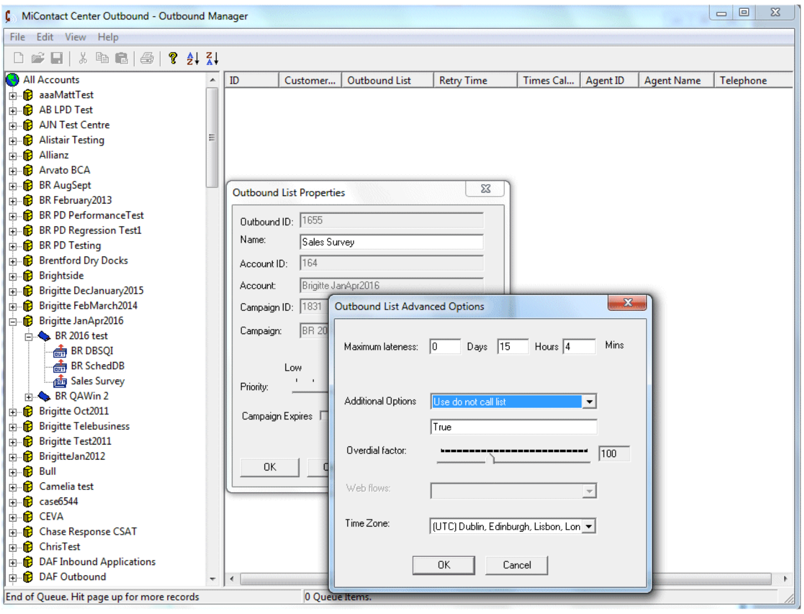
The contact numbers of persons to be removed will have to be added by the client into the Telephone field of the **PHOENIX_DoNotCallist** table on the Synthesys server.

The Synthesys **DoNotCallService** will check this telephone field at 3am every morning and automatically remove associated records from the Outbound list.

Enabling the Use Do Not Call List feature

In the Outbound Manager:

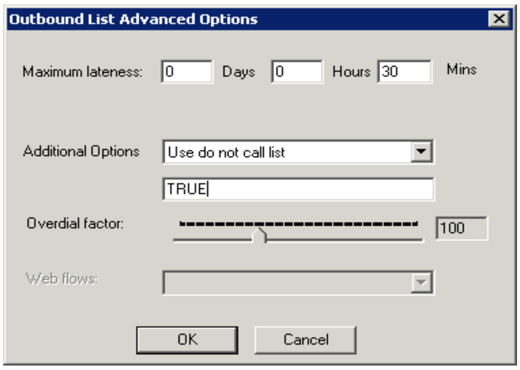
- Right click on the outbound list for which you want to enable the *Do Not Call List* feature and choose ***Properties*.**
- In the *Properties* window click the ***Advanced*** button and select **UseDoNotCallList** from the *Additional Options* drop down menu.



Please see next page for more information.

Having selected **UseDoNotCallList** from the **Additional Options** drop down menu:

- Add the word **TRUE** and click ***OK*** to enable the *UseDoNotCallList* feature.
- To disable the *UseDoNotCallList* feature, add **FALSE** and click OK.

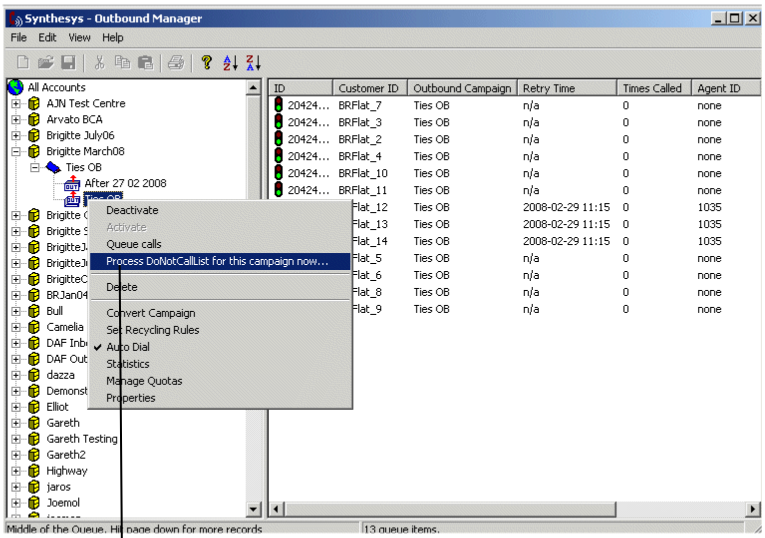


The Do Not Call List check is carried out at 3 am in the morning, every day.

Process DoNotCallList for this Campaign now

To run the check process manually and to remove persons from the queue of a particular Outbound List immediately:

- Check that **UseDoNotCallList** in the Outbound List Advanced Options dialog is set to TRUE.
- Right click on the outbound list and select ***Process DoNotCallList for this Campaign now***.



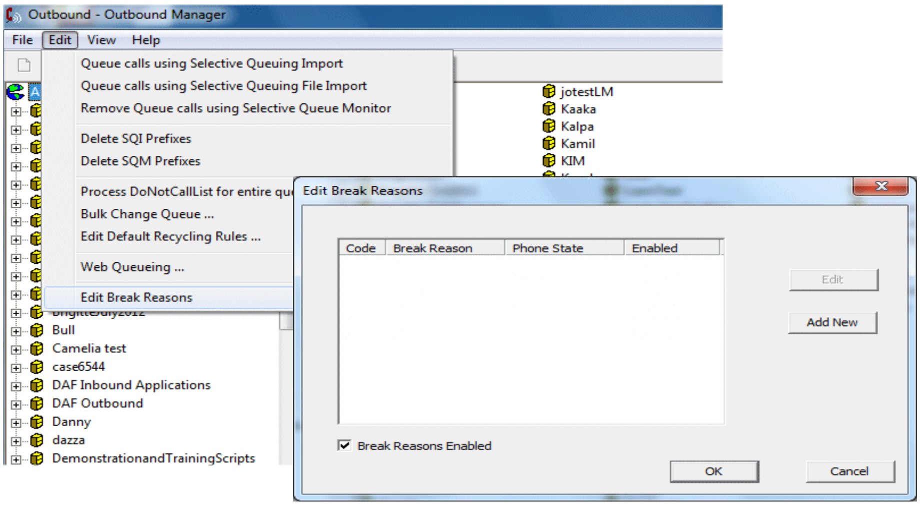
Select Process *DoNotCallList for this Campaign*, to run the check process immediately.

EDITING BREAK REASONS

The ***Edit Break Reasons*** option in the **Outbound Manager** allows users to add and edit reasons for going on a break. These reasons will be stored in the Phoenix_BreakReason table and can be selected by agents when taking calls, by clicking the ***Break*** icon on the *Telephony* toolbar.

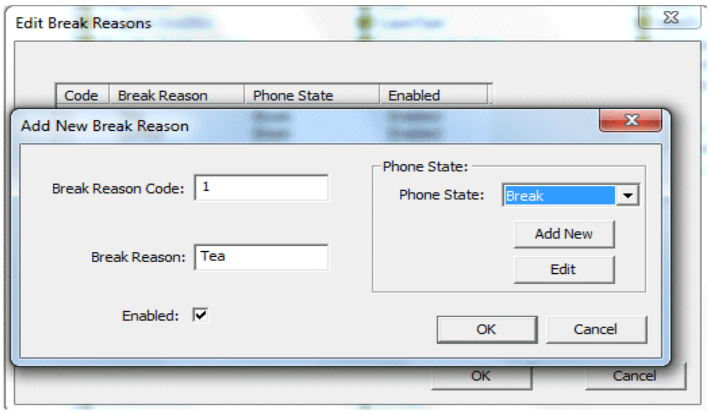
To add new break reasons

- Open the Synthesys Outbound Manager.
- Go to **Edit** on the menu bar and select **Edit Break Reasons.**



In the **Edit Break Reasons** dialog click the **Add New** button, to enter new break reasons.

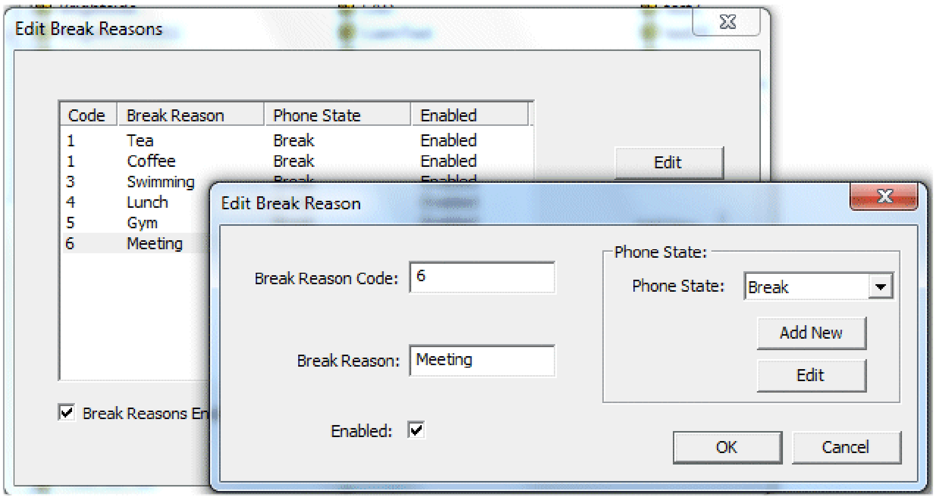
- Enter the ID/ code (as used by your Telephony Switch) for first reason, into the **Break Reason Code** field.
- Enter the reason for the break into the **Break Reason** field.
- Tick the **Enable** box to display the reaon at run time and allow selection.
- Select or enter the **Phone State** (to reflect the phone state used by your Telephony Switch).



- Click OK to save the changes.

To change information of existing break reasons

- Select the break reason that you wish to edit and click the **Edit** button.
- In the *Edit Break Reason* dialog now displed, update the relevant fields, as required.
- Click OK to save the changes.



At run time, when clicking the **Break** icon on the *Telephony* toolbar, the added break reasons will be displayed for selection.

If the message: *Failed to save 'break reasons enabled' to synthesys.inf* is displayed when ticking/ un-ticking the **Break Reasons Enabled** checkbox, please ask someone from your IT department with full system administration rights to enable or disable the break reasons.

MANAGING QUOTAS

The *Manage Quotas* option in the Outbound Manager is used to deactivate an Outbound list automatically once a predefined number of calls on a specified call result is achieved and written to the database.

For more information, please use the document: **Synthesys Outbound – Managing Quotas.**

OUTBOUND GROUPS

Outbound Groups are used to present agents with a combination of calls from multiple call lists of multiple Outbound Lists.

Each Outbound list within a group has a weighting, which determines the ratios of calls that are made from an Outbound group should it contain multiple Outbound list.

For more information, please use the document: **Synthesys Outbound Groups.**

IMPORTING & QUEUING CUSTOMER RECORDS

The Selective Queuing Import ("SQI") utility allows the import, update and queuing of customer records from an external database or file, using the existing Synthesys CRM and Outbound mechanisms.

Using the SQI Wizard users determine which data source to use, the import selection criteria and whether or not the import/ queuing process should be run immediately or at a later stage via a SQI report and schedule.

For more information, please use the document: Selective Queuing Database Import or Selective Queuing File Import.

DEFINING RECYCLING RULES

Using Synthesys *Scripted Call Recycling* simple and complex recycling rules can be created utilizing a graphical script, built much like a Synthesys Callflow.

Each Outbound list has a default Recycling script attached, which will serve as a useful starter to help customers generate their own scripts.

For more information, please use the document: **Synthesys Call Recycling.**