OUTBOUND

Selective Queuing Import "SQI"

SELECTIVE QUEUING IMPORT ("SQI")

INTRODUCTION

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

The SQI Wizard provides a guide through the various steps of setting up a Selective Queuing Import.

Users determine which data source and which columns in one specific table from that data source are to be used in the import. They then can define the import selection criteria, specifying which records to import and define the output of the import process, which is essentially a Synthesys CRM table and the way in which the input columns relate to the CRM columns.

Users can furthermore decide whether to run the data import immediately or at a later stage, creating a SQI report and schedule for the report to be run and if required customer records to be queued.

THE SQI WIZARD

To import data and place customers to be called into an outbound list using the *Selective Queuing Import:*
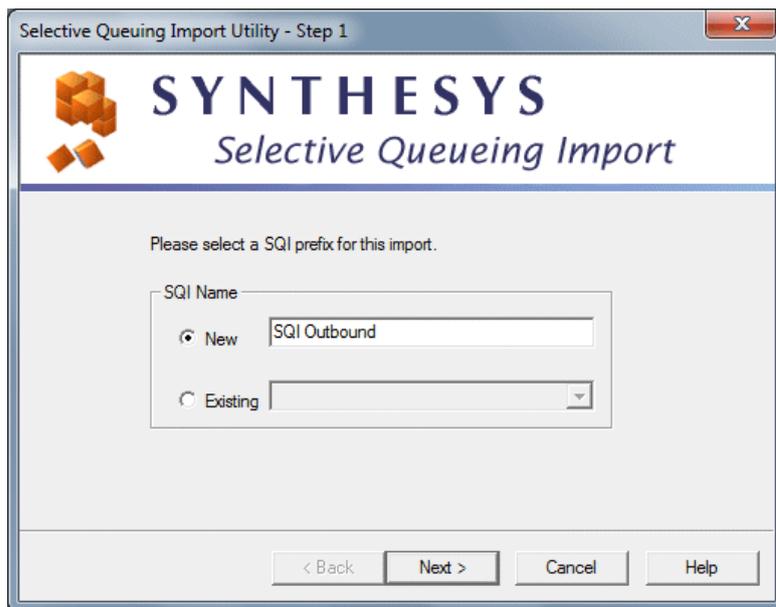
- Open the *Synthesys Outbound Manager*.
- Select the required Outbound list and go to **Edit** on the menu bar.
- Select *Queue calls using Selective Queuing Import* to open the SQI Wizard.

In the first window of the SQI Wizard

- Enter a name for a *New* SQI import

Or

- Select an *Existing* SQI name from the drop down menu.

Click Next> to continue to the next page of the wizard.

SQI 'Import and Queue'

In the second page of the SQI Wizard, you can now select either:

Import and Queue   To Import customer data into the CRM, as well as queuing customers in the Outbound Manager

Queue only   To simply queue the customers already in your CRM

To queue customers from an external data source, use the 'Import and Queue' option to import the customers into the CRM first, before placing them into a queue. If the customer records are already in the CRM, you can use the 'Queue only' option.
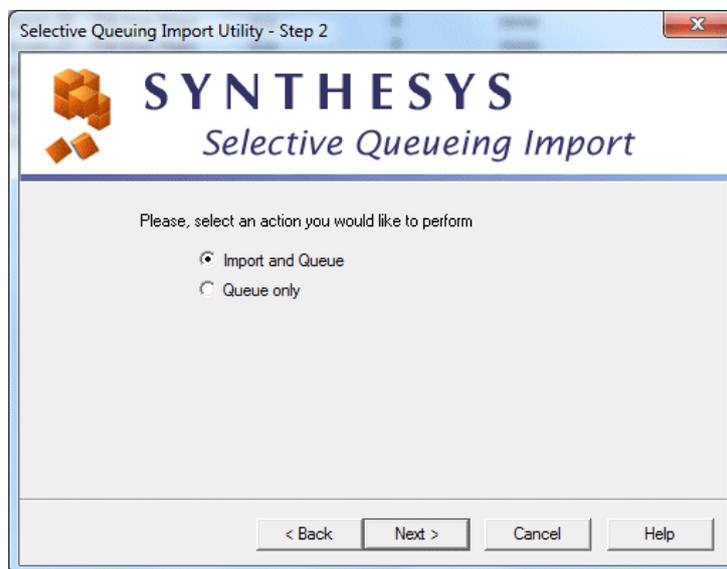
Click Next> to continue to the next page of the wizard, where you select the required data source, database table and columns.

## Part 1: Input – Data Source & Table Columns

You now need to select the database that contains the table with the data to be imported from the list of ODBC data sources available on the system.
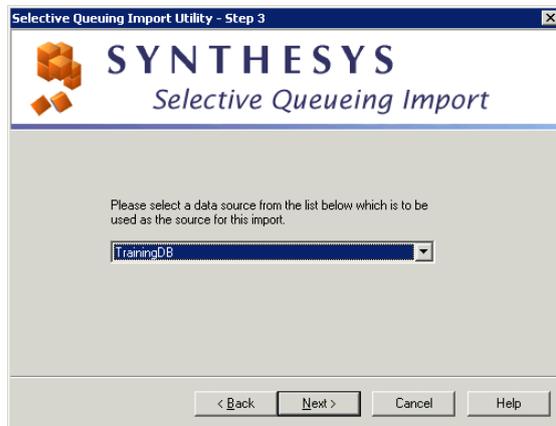
Next, select the table or view from the selected data source, and the columns from that table/ view to be used in the import.

The last step in this part allows you to give the selected fields more user-friendly names.
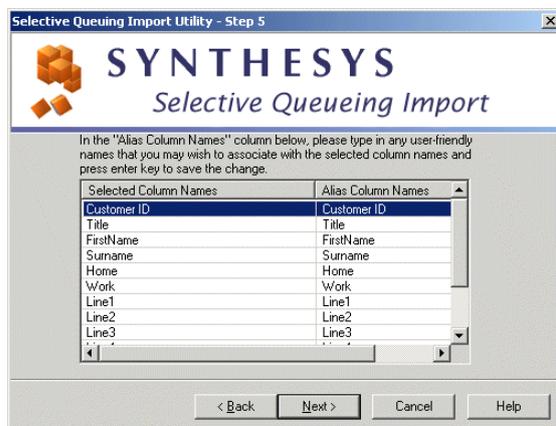

The first column contains the selected column names.

The second column ('Alias column') an editable field in which you can type any user-friendly names that you may wish to associate with the selected column names.

Press ENTER each time, to save any name changes made in the Alias column.

Part 2: Import Selection Criteria

The 'Import Selection Criteria' allow you to choose which records to import, by specifying a set of conditions. If you wish to import all records, skip this step by clicking Next>.
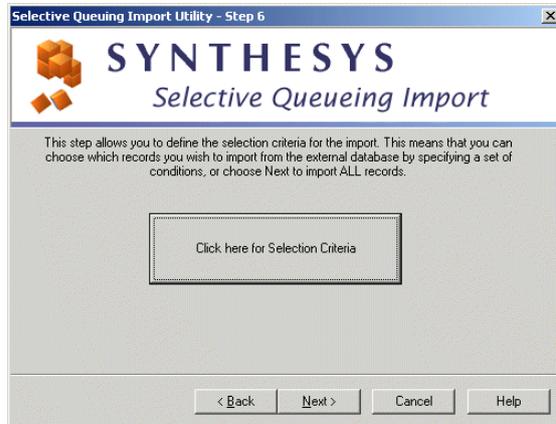
Clicking the 'Selection Criteria' button will open the 'Selection Criteria Definition' screen.

The *Selection Criteria Definition* screen consists of a work area, also called "the canvas", where coloured discs represent the different conditions.

Create Condition   Duplicate Conditions
                                    Delete Condition View Condition Summary
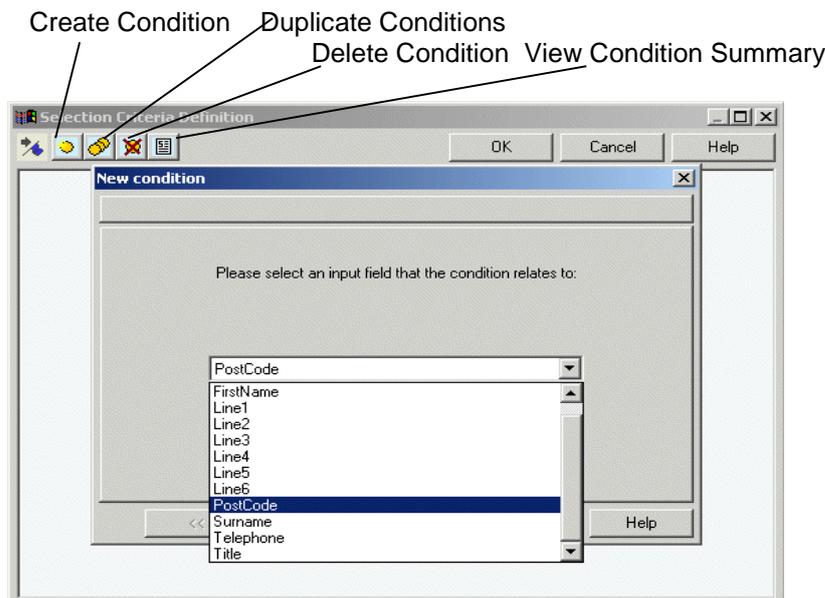
'Create Condition'. Click this icon, to create a new condition. To e**dit** existing **conditions**, double-click on the relevant condition disc.

'**Duplicate condition'.** Click this icon, to duplicate an existing condition.

'Delete a condition'. Click on the disc that you wish to delete, and then on the 'Delete condition' icon.

'View condition summary' click this icon, to view a summary of all conditions.

To create a new condition:

- Click the **Create Condition** icon.

- In the ***New Condition*** window select the property to define your search using any fields available in your CRM (for example the ***Postcode*** field.

- Click the [>>] button to move to the next screen of the wizard to select the required operator, i.e. **containing** and then type **SW** to specify that you wish **to queue all customers in the SW area**.
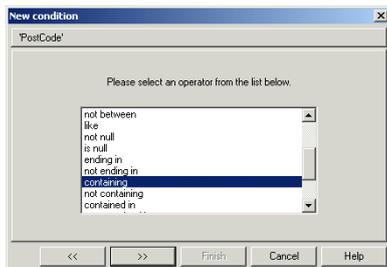
We are then prompted to enter a name for our condition, i.e. Postcode **SW**.

When the condition has been defined, the name entered next will appear on the free, floating disc on the canvas.

- To create another condition, click the **'Create Condition'** icon**.**

- To e**dit** existing **conditions**, double-click on the relevant condition disc.
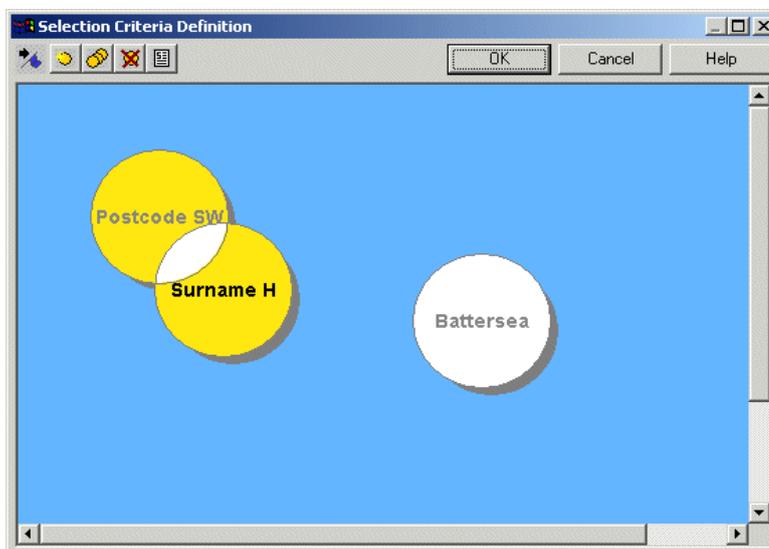
If two discs are overlaid completely, press Control on the keyboard to drag them apart.

Each condition disc can be manipulated, clicking and dragging it around the canvas. Any discs that ***overlap*** with one or more other discs will ***imply a Boolean 'AND'*** to operate between the conditions. For example, customers are to be queued if:

(Postcode SW **AND** Surname begins with H) **OR** (Borough = Battersea)

Click OK and proceed to the next page of the wizard.

Part 3: Binding Source Fields & CRM Columns

This part defines the output of the import process, which is essentially a Synthesys CRM table and the way in which the input columns relate to the CRM columns.

- Click Next> in the *Selection criteria* window to move to the next part of the SQI Wizard.
- Select the Outbound list for which you want to queue the calls.

Selecting the Outbound list will automatically determine the CRM prefix to be used.
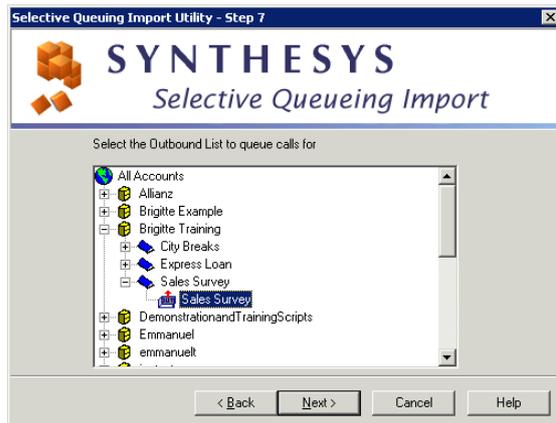
The next step involves assigning values to the destination fields.

The Source column is one of the aliases defined in Part1; the Destination column is the CRM table. To change a source field:

- Click into the required field in the Source column and from the drop down menu displayed, select the appropriate field.

The *Calculations* option is not available in the current version.

If your CRM contains more than one telephone number, the next screen of the wizard will ask you to select the number that you wish to use in the event of the campaign being turned into a Predictive Outbound list.
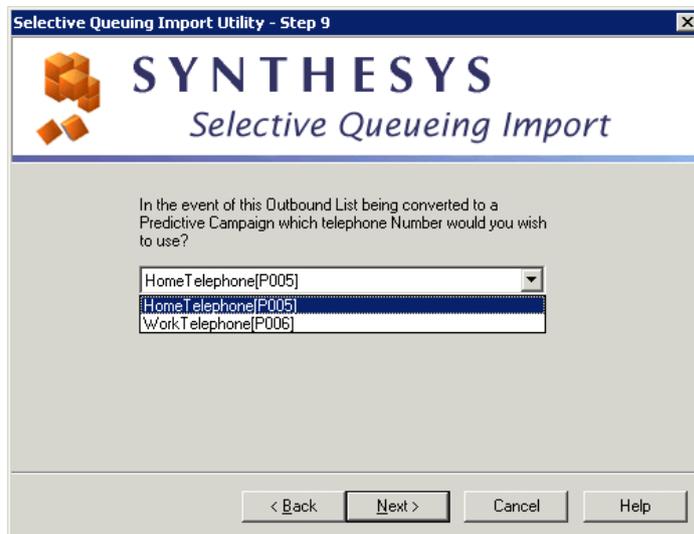
## Part 4: Queuing Customer Records

This part is concerned with the parameters governing the queuing of Outbound calls.

In this part of the wizard you can define restrictions to be imposed when queuing calls, based on previous contact with a specific customer.

To *exclude* customers from the call queue:

- Place a tick into the boxes of the call outcomes to be excluded, selecting a date if required.
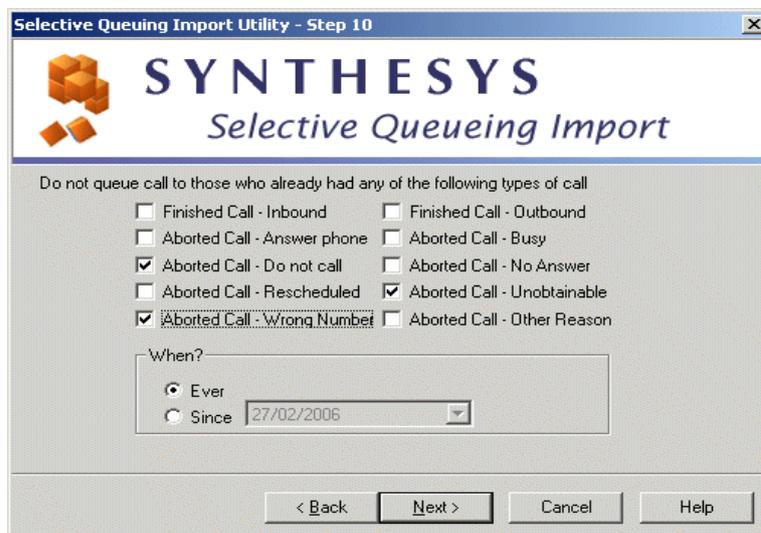
The next page of the SQI Wizard allows you to check for possible duplicates in the queuing process, i.e. to check that no call is already queued for this person. Note: Checking for duplicates can take a long time to perform.
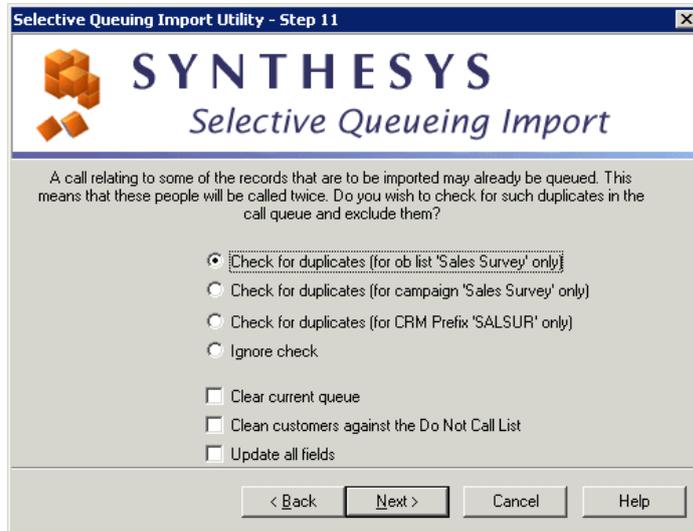

Do NOT tick the 'Update all fields' box, if you only wish to update some of the selected CRM fields.

Select Option	Description
Check for duplicates (for Outbound list 'Outbound list Name' only)	To check the current Outbound list selected for duplicates.
Check for duplicates (for campaign 'Campaign Name' only)	To check all Outbound lists associated with the selected Campaign for duplicates.
Check for duplicates (for CRM Prefix 'Customer_Prefix' only)	To check all Outbound lists that use the same CRM prefix.
Ignore check	If you do not need to check for duplicates, for example queuing calls for a new campaign.
Clear current queue	To remove customers from the selected outbound list, before queuing calls.
Clean customers against the Do Not Call List	To check the Phoenix_DoNotCallList table for telephone number and to remove customers from the call queue if a match is found.
Update all fields	Tick to update all fields within your CRM, do NOT tick, if only selected fields are to be updated.

Finally, the last step gives you the option to run the import immediately or at a later stage and whether or not to queue calls in the Outbound Manager.

The available options for placing customers into the call queue are:

- Import now

- Schedule later in Campaign Manager

- Do not queue calls
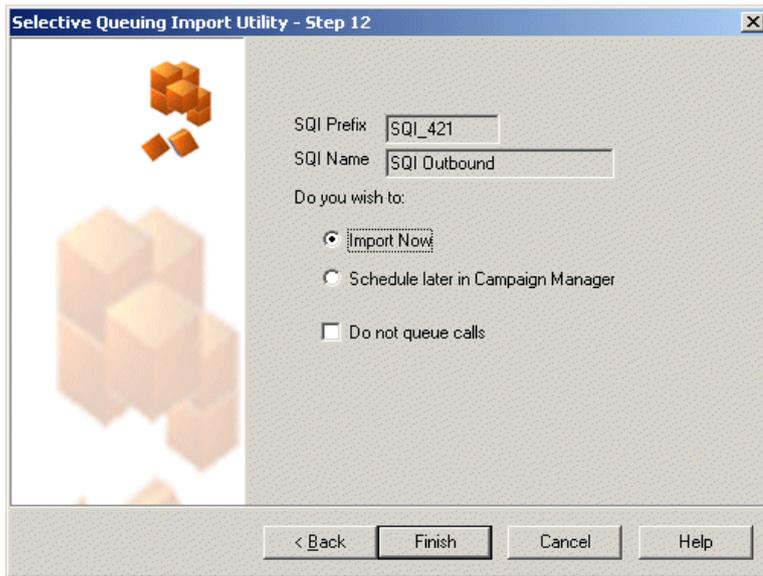
- Tick Import now to queue the customers immediately. The queue process will start in the background and after a short while all relevant calls will be displayed. To refresh the Outbound Manager, you can press the F5 key.

- Tick Schedule later in Campaign Manager to queue customers at a later stage, running a SQI report. Make a note of the SQI name, as you will need the SQI name, when setting up your SQI report.

- Tick Do not queue calls, if you want to run the CRM Import without queuing customers.

If you tick the Schedule later in Campaign Manager option, make a note of the SQI name entered, or copy it, as you will need the SQI name, when setting up your SQI report and schedule.

Please see the section on 'Schedule a SQI Import in Campaign Manager' for information about setting up and scheduling a SQI report

SQI 'Queue only'

Part 1: Enter or select a SQI Name

- To set up a new Queue Only queuing import, enter a New SQI name.

- To view an existing SQI Import, select an existing SQI name from the drop down menu.

If you select an existing SQI name, the *Import and Queue* or *Queue Only* option in Step 2 of the wizard will be greyed out, as the type of import action associated with the selected SQI name has already been defined.
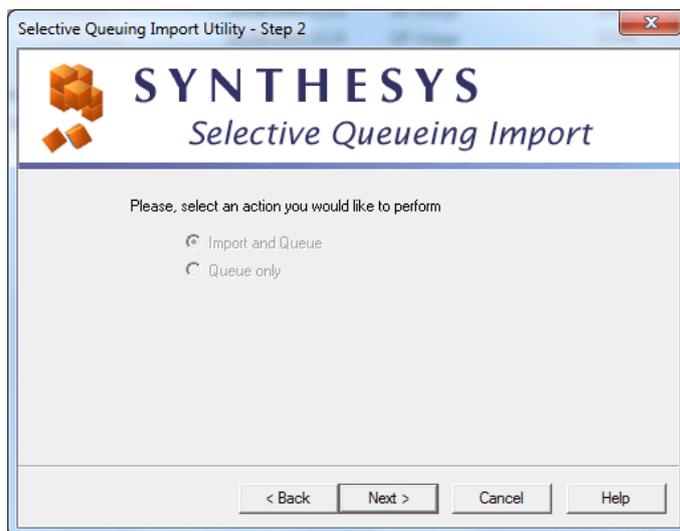
If the customer records are already in the CRM, you can use the 'Queue only' option.

If you need to import customer records first, before placing them into the queue, you <u>must</u> use the 'Import and Queue' option

Part 2: Selection of Outbound List

You now need to select the Outbound list, for which you want to queue the customer records.

Click Next> to move you to the next page of the wizard.

Part 3: Set Selection Criteria for Queuing

The **Selection Criteria** allow you to choose which records to queue, specifying a set of conditions. If you wish to queue all records, skip this step, clicking Next>.
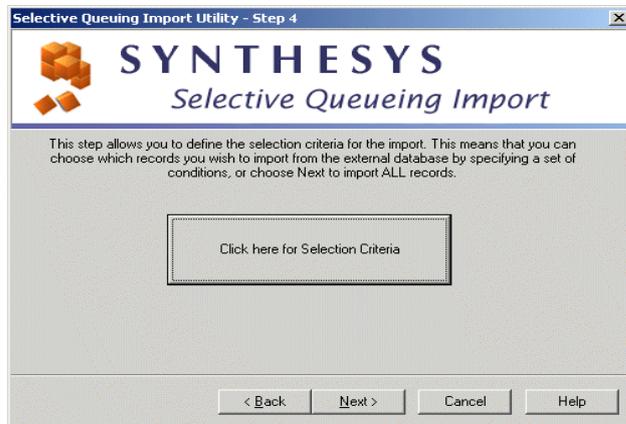
Click the 'Selection Criteria' button will open the 'Selection Criteria Definition' screen.

The *Selection Criteria Definition* screen consists of a work area, also called "the canvas", where coloured discs will represent the different conditions.
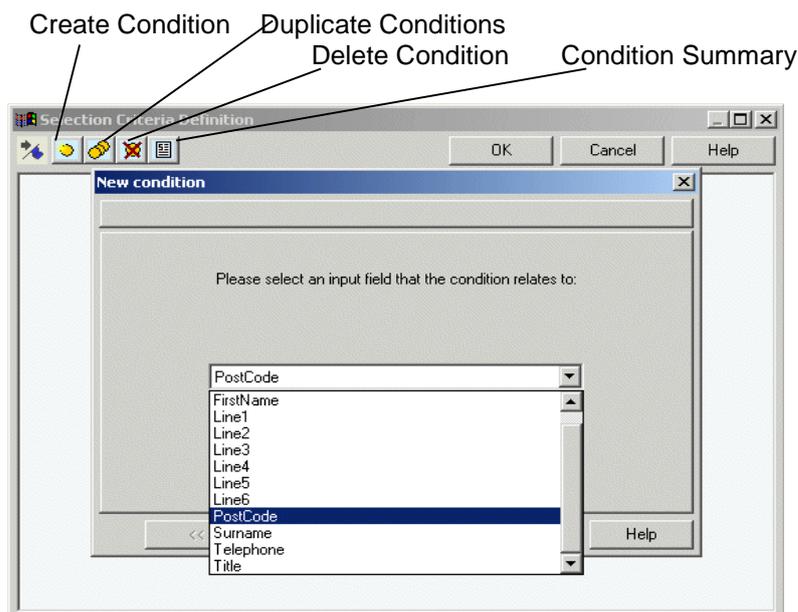
Create Condition   Duplicate Conditions
   Delete Condition   Condition Summary

To create a new condition, click the **'Create Condition'** icon. In the 'New Condition' window, select the property according to which you want to define your search. You can use any field that is available in your CRM (in our example we have selected 'Postcode').

NOTE: For more information about setting selection criteria, see Part2: Import Selection Criteria, in the SQI 'Import and Queue' section.

Clicking OK, and Next>, to proceed to the next part of the Wizard.

Select the telephone number that you wish to use, in the event of the campaign being turned into a Predictive Outbound list.
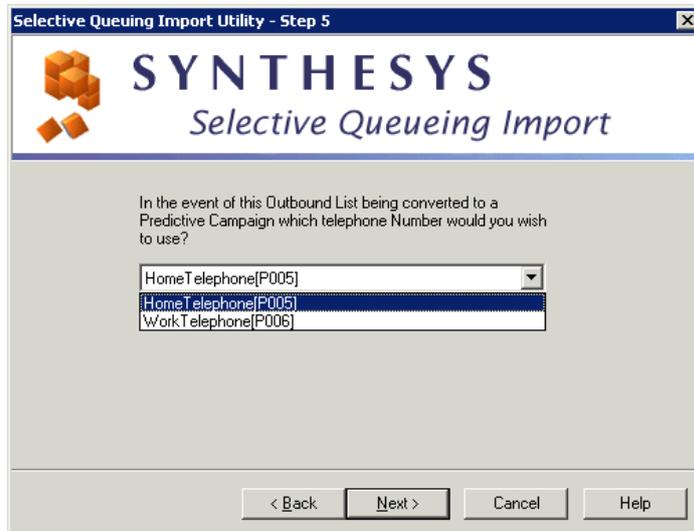

Part 4: Queuing Customer Records

This part is concerned with the parameters governing the queuing of Outbound calls.

Here you can define restrictions to be imposed when queuing calls, based on previous contact with a specific customer.

To *exclude* customers from the call queue:

- Place a tick into the boxes of the call outcomes to be excluded, selecting a date if required.
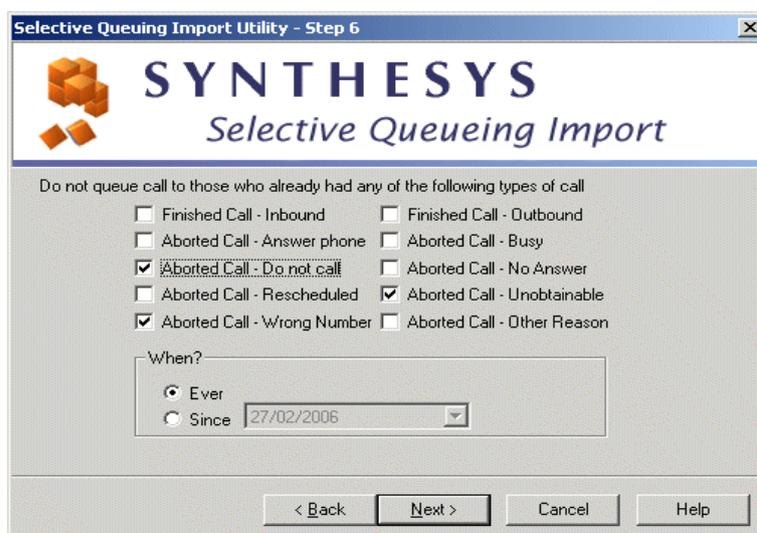
You now have the option to check for possible duplicates in the queuing process, i.e. do you want to check that no call is already queued for this person.
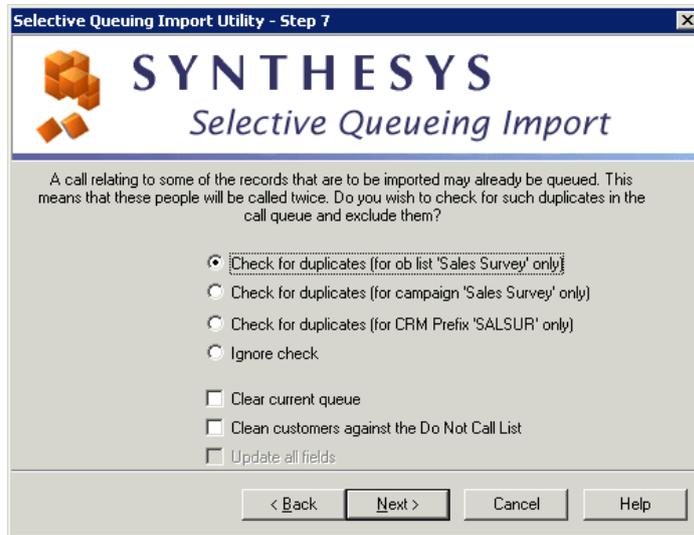

Update all fields is greyed out, as this is only relevant for the 'Import & Queue' option.

Select Option	Description
Check for duplicates (for Outbound list 'Outbound list Name' only)	To check the current Outbound list selected for duplicates.
Check for duplicates (for campaign 'Campaign Name' only)	To check all Outbound lists associated with the selected Campaign for duplicates.
Check for duplicates (for CRM Prefix 'Customer_Prefix' only)	To check all Outbound lists that use the same CRM prefix.
Ignore check	If you do not need to check for duplicates, for example queuing calls for a new campaign.
Clear current queue	To remove customers from the selected outbound list, before queuing calls.
Clean customers against the Do Not Call List	To check the Phoenix_DoNotCallList table for telephone number and to remove customers from the call queue if a match is found.
Update all fields	Tick to update all fields within your CRM, do NOT tick, if only selected fields are to be updated.

The last step of the Wizard gives you the option to queue the customers immediately or to schedule the queuing process for a later stage.

- Queue now

- Schedule later in Campaign Manager'
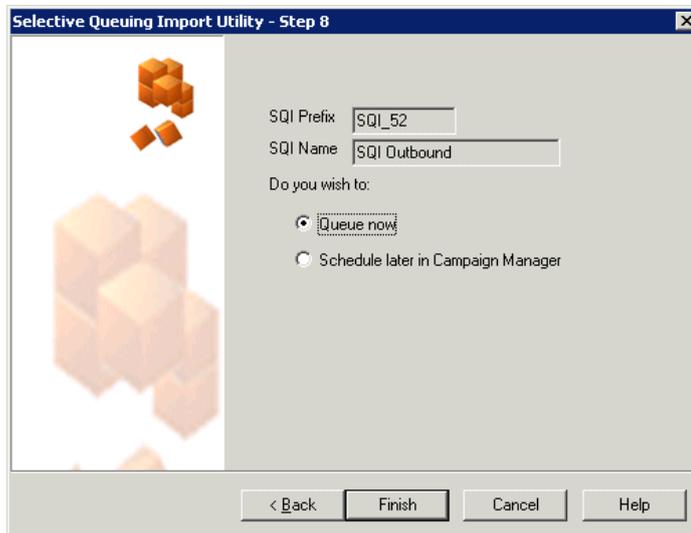
Remember to make a note of the SQI name entered, as you will need the SQI name, when scheduling your SQI report in the Campaign Manager.

- Tick Queue now to queue the customers immediately. The queue process will start in the background and after a short while all relevant calls will be displayed. To refresh the Outbound Manager, you can press the F5 key.

- Tick Schedule later in Campaign Manager to customers at a later stage, running a SQI report. Make a note of the SQI name entered, as you will need the SQI name, when scheduling your SQI report.

*If you tick the **Schedule later in Campaign Manager** option, make a note of the SQI name entered, or copy it, as you will need the SQI name, when setting up your SQI report and schedule.*

*Please see the section on **Schedule a SQI Import in Campaign Manager** for information about setting up and scheduling a SQI report.*
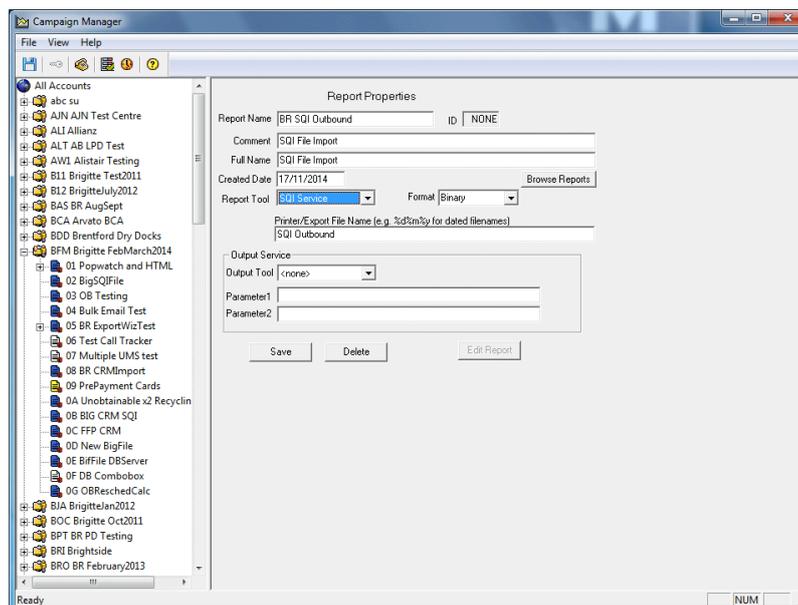
Schedule a SQI Import in Campaign Manager

To set up a SQI report and schedule in the *Campaign Manager*:

- Open the *Synthesys Campaign Manager* clicking on **Reports**.

Setting up a SQI Report

In the Campaign Manager:

- Locate and right click on your campaign and select *Add New Report*.
- Enter the *Report Name*, any *Comments* as required and type a name into the *Full Name* field.
- Select *SQI Service* in the *Report Tool* field.
- Next, type in the *SQI name* as entered in Step 2 of the SQI Wizard into the Printer/Export File Name field, for example *SQI Outbound*.
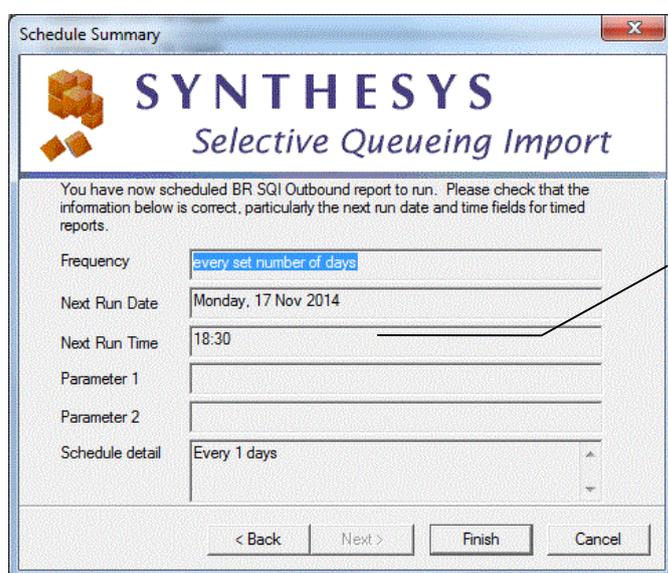- *Save* your SQI report.

Scheduling a SQI Report

To add a schedule for your SQI report:

- Locate and right click on your report in the *Campaign Manager* and select Add Schedule

- In the *Schedule Wizard*, select a start and end date and the *frequency* of the report run.

- *Save* the schedule for your SQI report.

In our example, the next SQI report will run on Monday 17th November at 18:30.

In our example, the SQI report will run daily at 18:30.

To check that your SQI report has run successfully

- Go to *Report Runs* or alternatively check the queue in the Outbound manager.
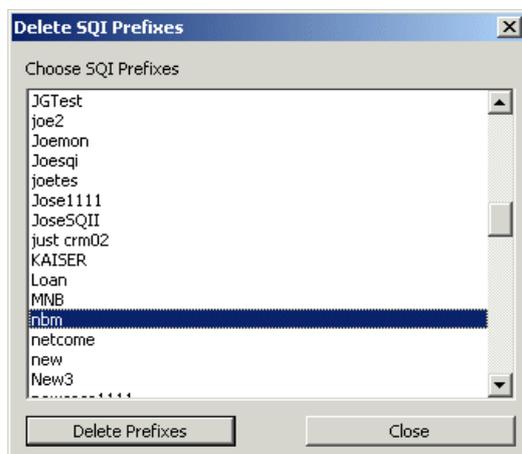
For further information regarding setting up reports and schedules, please see the Synthesys Reports and Schedules manual.

DELETING SQI PREFIXES

The function to delete SQI prefixes has been added to the Edit menu in the Outbound Manager.
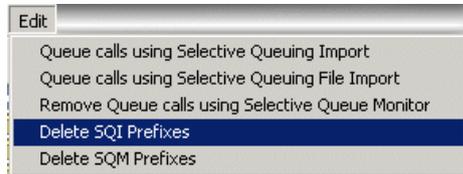
From a dialog listing all SQI prefixes, users can select one or more prefixes for deletion.

Prefixes can only be deleted, if no live schedules are assigned for the selected SQI prefixes.

If schedules exit, they will have to be removed first and the delete request is ignored.