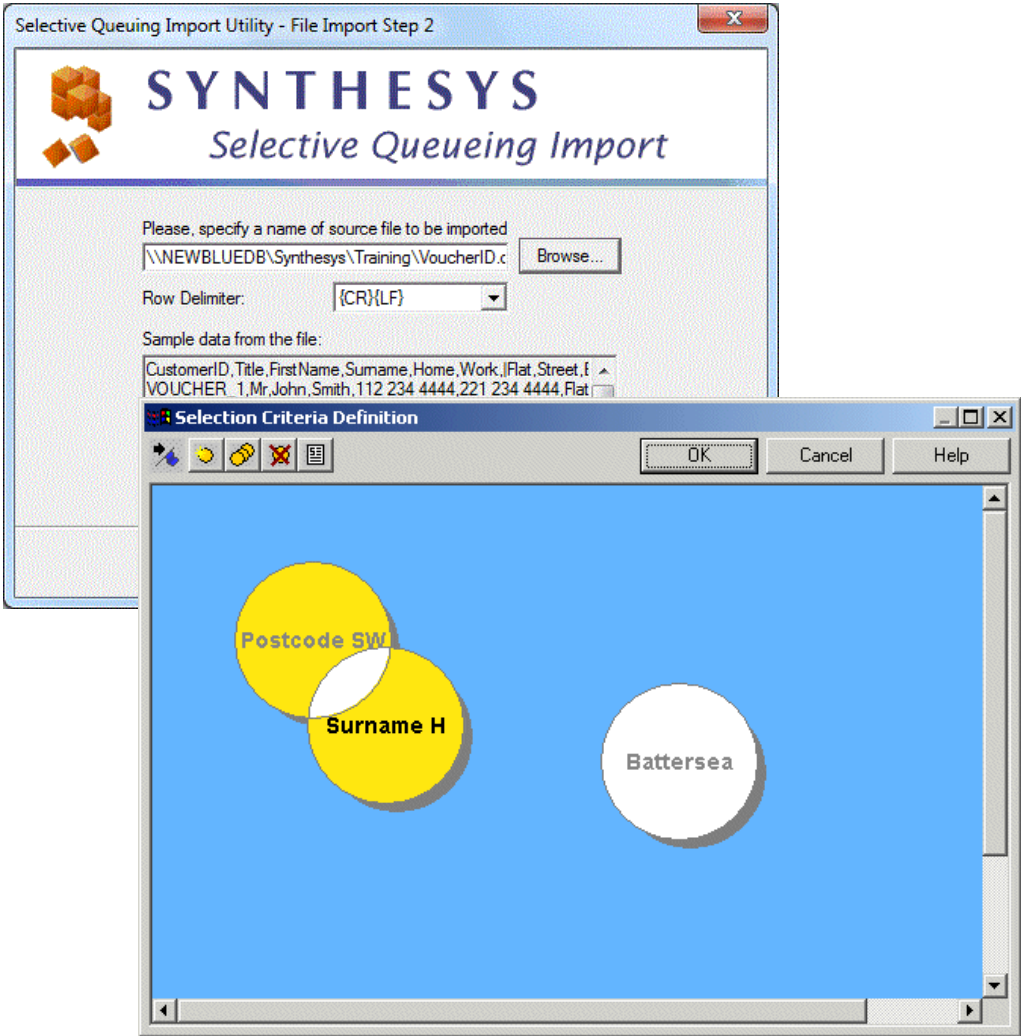


OUTBOUND

Selective Queuing File Import “SQI”



SELECTIVE QUEUING FILE IMPORT (“SQI”)

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INTRODUCTION

The Selective Queuing File Import utility allows the user to import, update and queue customer records from a flat file.

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

Users determine which file is to be used for 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 data to be imported relates 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 FILE WIZARD

To place customers to be called into an outbound list using the Selective Queuing File Import option:

- Open the *Synthesys Outbound Manager*.
- Select the required Outbound list and go to **Edit** on the menu bar.
- Select Queue calls using Selective Queuing File Import to open the SQI Wizard.

The SQI Wizard provides a step-by-step guide through the process of importing or updating data, using the Selective Queuing File Import.

Please see the following pages for details.

Part 1: Data Input, Source File and Table Columns

Selecting the Data File

The first part of the wizard will determine which data file is to be used for the import.

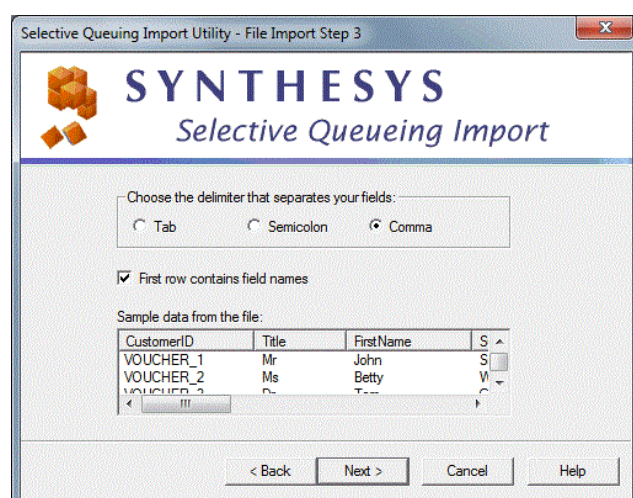
Step 1: SQI Welcome screen. Click the *Next* tab of the SQI Welcome screen to move to the next page of the Wizard.

Step 2: The next step involves the selection of the source file. Click the *Browse* button, to select the file, choose a *Row Delimiter* if required and view the data that you are about to import.



Note: The name of the source file needs to contain the full UNC path and therefore contain \\MachineName\Drive\....

Step 3: Now, select the delimiter that separates your fields, i.e. 'Tab', 'Semicolon' or 'Comma' and view the effect in the *Sample data from the list* section.



To display the column headings contained in the File that you import, tick the 'First row contains field name' box.

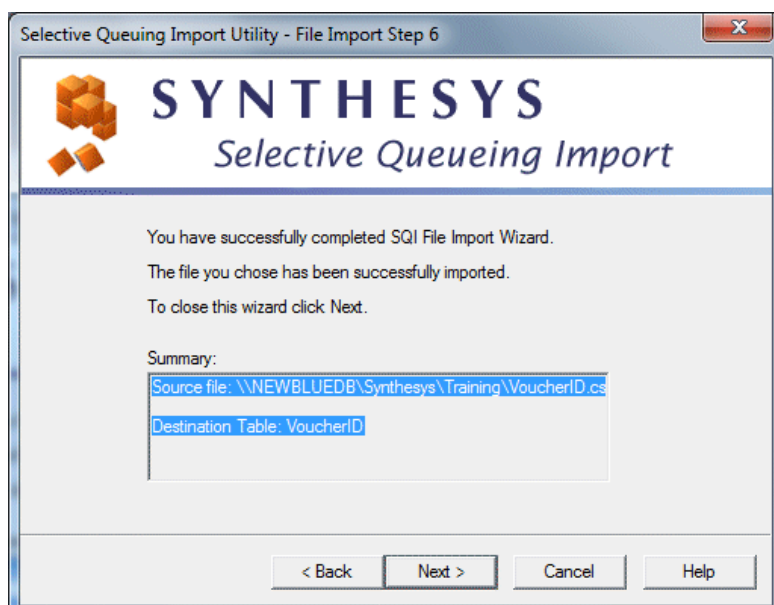
Creating a Temporary Data Import Table

You now need to create a temporary database table where the data from your flat file will be stored initially, before you choose the destination data source later on in the wizard.

Step 4: This is where you enter the name of the table in which the data from your flat file will be stored temporarily.



Steps 5 & 6: Show the process of importing the flat file data, and that the temporary table has been created.



Data Source and Table Columns

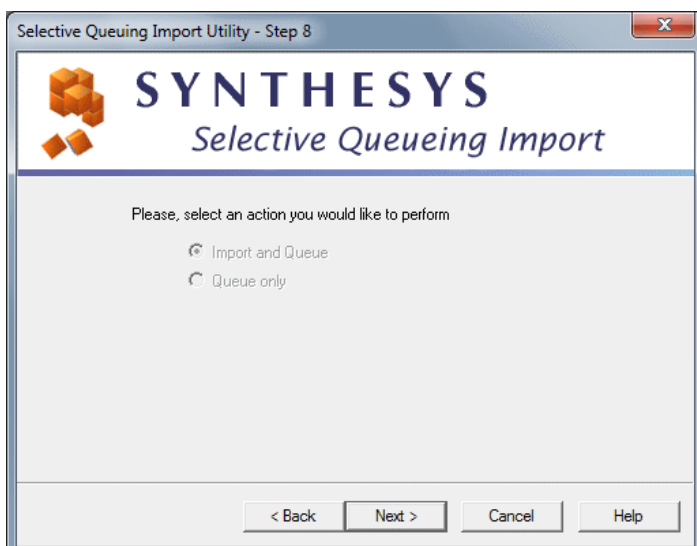
Having successfully completed the import of the flat file data to the temporary table, you now need to create or select a name for your SQL import, select the Database with the temporary table that you have created and specify the columns to be used in the import.

Step 7: Enter a **new name** for your SQL import **or** select an **existing SQL name** from the drop down menu.

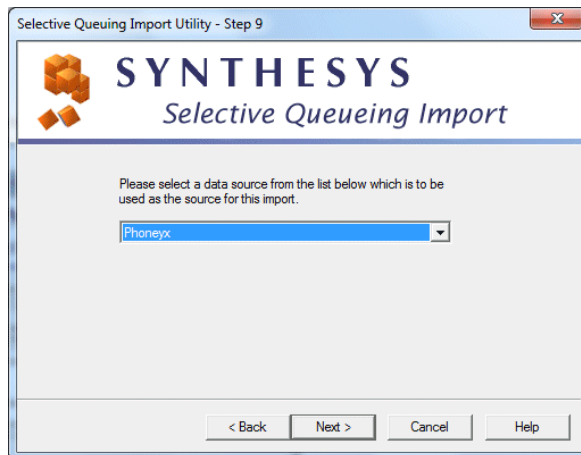


When selecting “Queue Calls using Selective Queuing File Import” you will be prevented from picking up a Queue Only SQL name. A message will inform you that *Queue Only* prefixes are not allowed for file imports.

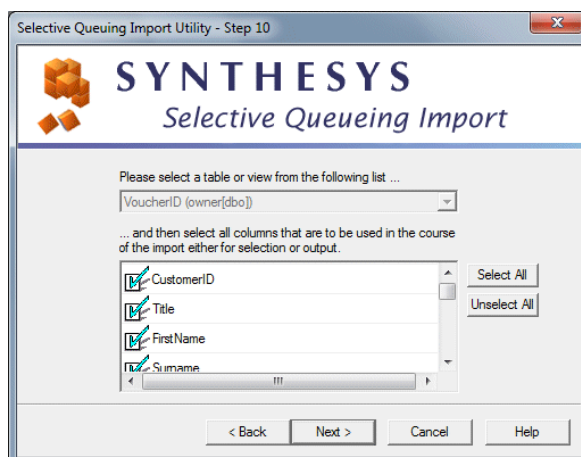
Step 8: This dialog shows the input action for the File import. The *Import and Queue* or *Queue Only* option will be greyed out, as the action associated with a new file SQL import has already been selected, i.e. Import and Queue.



Step 9: Now, select the required data source from the list of ODBC data sources available on the system. You need to select **Phoenix**, as this is the location of the temporary table that you have created.



Step 10: Your temporary table will be displayed automatically. You can now tick the columns from the table that you wish to use for the import.



Step 11: 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.



To change the name displayed in the Alias column, click into the field and type in the user-friendly name.

You then must press enter after each name change, to commit the changes made in the Alias column.

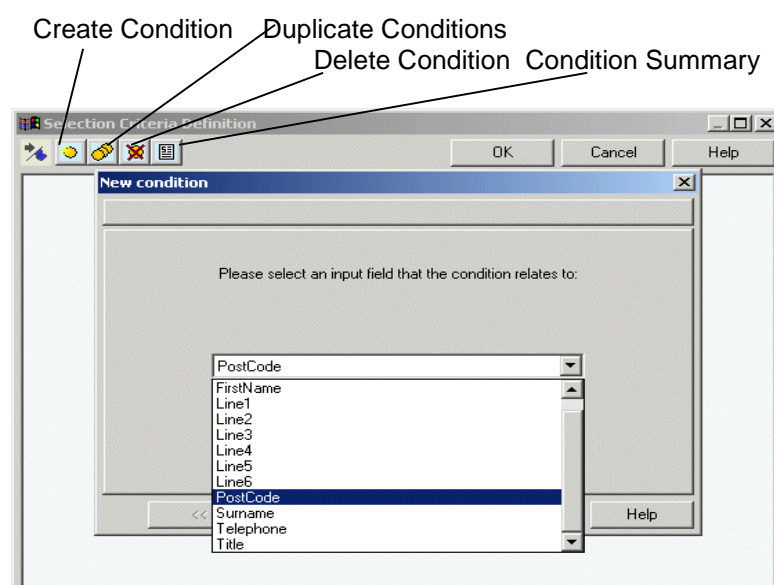
Part 2: Defining Import Selection Criteria





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 the 'Next' tab.

Step 12: Clicking the 'Selection Criteria' button will open the 'Selection Criteria Definition' screen.





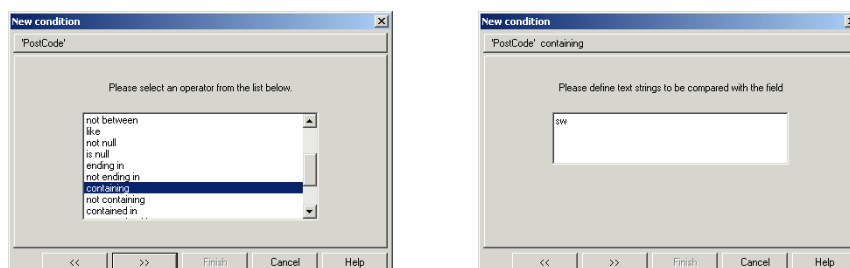
The *Selection Criteria Definition* screen consists of a work area, also called "the canvas", where coloured discs will represent different conditions.



-  **'Create Condition'**. Click this icon, to create a new condition. To **edit** 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

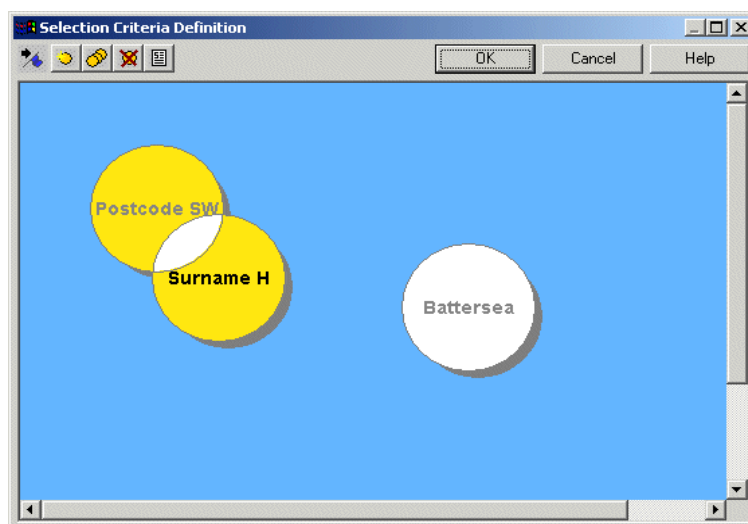
- Click the Create Condition  icon.
- In the *New Condition* window select the property to define your search using any fields available in your CRM (for example the *Postcode* field).
- Click the  button to move to the next screen of the wizard to select the required operator, i.e. containing and then type SW to specify that you wish to queue all customers in the SW area.



We are now prompted to enter a name for our condition, i.e. **'Postcode SW'**.

Once the condition is defined and a name has been entered, it will appear as a free, floating disc on the canvas.

- To create another condition, click the 'Create Condition'  icon.
- To edit existing conditions, double-click on the relevant condition disc.



Ungroup Groups by clicking on the non-intersecting part of a disc and dragging away.

If 2 discs are overlaid completely you need to 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 step.

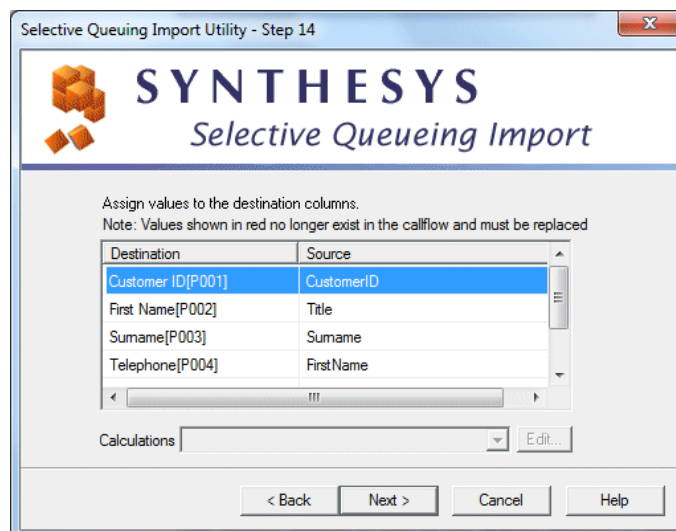
Part 3: Binding Source Fields & CRM Columns

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.

Step 13: Selection of an Outbound list. This will automatically determine the CRM prefix to be used. 'Next' will move you to the next page of the wizard.



Step 14: The next step involves assigning values to the fields defined in steps 10 and 11 with actual CRM columns.



To change a Source field, click on the relevant field in the Source column and select the required field from the drop down menu.

The Source column is one of the aliases defined in step 11 (Part1), the Destination column is the CRM table.

The Wizard will also potentially allow for calculations based on the Source fields to be used. This however is not available in the current version.

Part 4: Queuing Customer Records

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

Step 15: If your CRM contains more than one telephone number, select the telephone number that is to be queued and dialled first, in the event of the campaign being turned into a Predictive Outbound list.



Step 16: Defining 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 relevant box of possible call outcomes and if required select a date as appropriate.



Step 17: This option 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 is advisable, but can take a long time to perform.

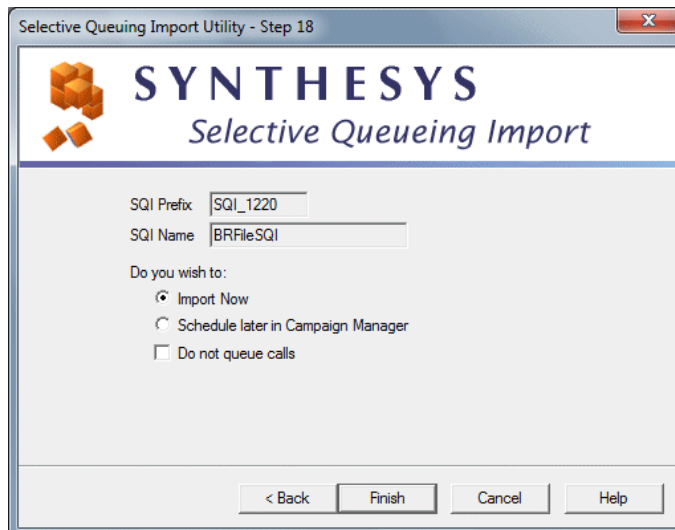


Do NOT tick the 'Update all fields' box, if you only wish to update some of the selected CRM fields.

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.

Step 18: Finally, the last step gives you the option to run the import immediately or at a later stage and gives you the option not to queue calls in the Outbound Manager.

- Import now
- Schedule later in Campaign Manager
- Do not queue calls



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 **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, 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 entered, as you will need the SQI name, when scheduling 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.

SCHEDULING SQI REPORTS IN CAMPAIGN MANAGER

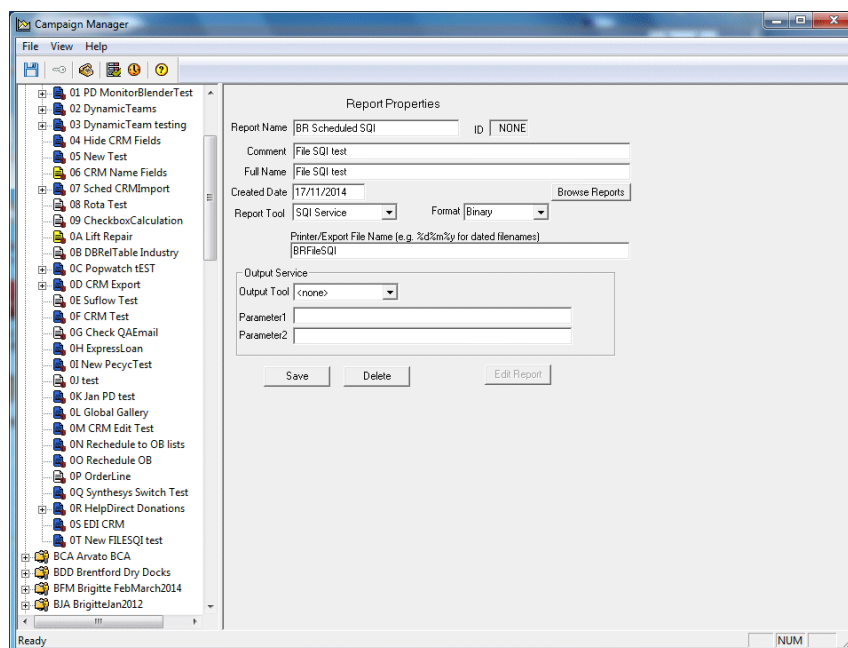
To set up a SQL report and schedule in the *Campaign Manager*:

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

Setting up a SQL 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 *SQL name* as entered in Step 6 of the SQI Wizard into the *Printer/Export File Name* field, for example *BRFileSQI*.
- Save your SQL report.

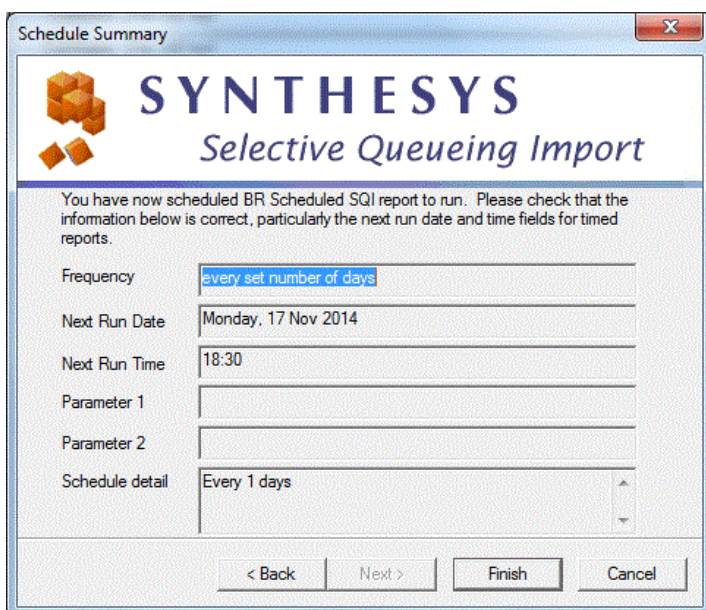


Scheduling a SQI Report

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.



Schedule Summary

SYNTHEYS
Selective Queueing Import

You have now scheduled BR Scheduled SQI report to run. Please check that the information below is correct, particularly the next run date and time fields for timed reports.

Frequency: every set number of days

Next Run Date: Monday, 17 Nov 2014

Next Run Time: 18:30

Parameter 1:

Parameter 2:

Schedule detail: Every 1 days

< Back Next > Finish Cancel

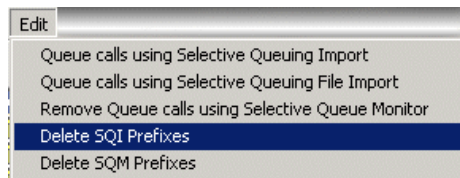
In our example, the SQI report will run daily, at 18:30.

To check that your SQI report has run successfully

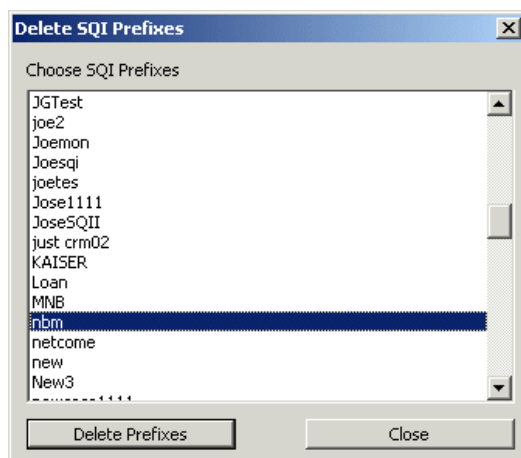
- Go to *Report Runs* or alternatively check the queue in the Outbound Manager.
- In the Change Queue Item State dialog select the queue state that you wish to display for the selected calls.

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 exist, they will have to be removed first and the delete request is ignored.

NOTES