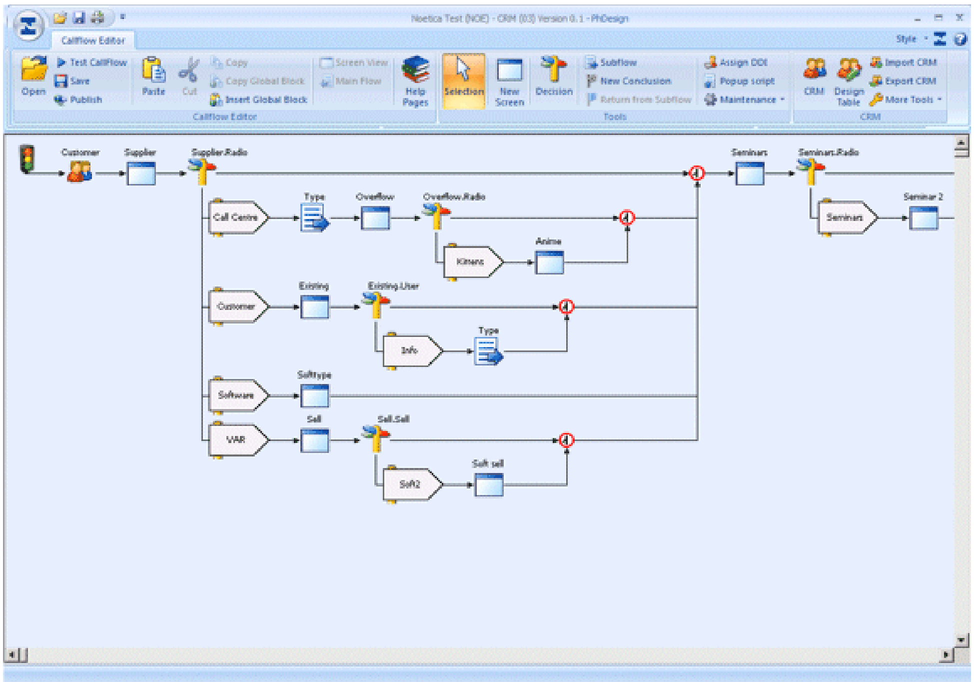
CAMPAIGN SETUP

Callflow Design & Outbound Management



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Notes prepared by Brigitte Reimer

CAMPAIGN SETUP

CALLFLOW DESIGN 14

INTRODUCTION TO SYNTHESYS

Synthesys is a state of the art call centre application, which consists of a number of complementary modules. These modules work in harmony to provide all the tools you need to design and build callflows, handle calls, track and monitor call centre activity and to maintain staff details of those using the Synthesys system. The latest software design techniques have been used to produce an application that is easy to use and flexible.

Designing Callflows and Taking Calls

Callflows, irrespective of their complexity, can be built quickly and easily using the powerful ***Campaign Editor***. Graphical representations, ActiveX controls and point and click mouse operations are all used to build the callflows you need.

When callflows have been designed and tested, they are ready for use within your call centre. The ***Agent*** module is then used to handle calls and you are skilfully guided through the appropriate callflow for the campaign in question. Prompts at the top of the screen provide dialogue to be spoken or supporting information to assist during the course of the call. If the caller decides to select a different option in the callflow, you can easily move backwards to any previous part of the callflow and make the appropriate changes. *Synthesys* then guides you to the next logical part of the callflow and no relevant data is lost.

Mid way through a call you can safely park the callflow and readily retrieve it at an appropriate time with all the data intact. This is useful if a caller has to ring back with further details. If required, calls can just as effortlessly be transferred to another agent, complete with the callflow and all the details that have been collected. The agent receiving the call that you have transferred simply carries on from where you left off.

Attaching Outbound Campaigns

Preview and predictive outbound lists, as well as SMS and email Outbound lists can be attached to any campaign, as long as the callflow has been assigned a CRM (Customer Relationship Management).

You can set the date and time frame during which the call should be taken and specify by which agents. The outbound call will then be placed in a queue according to the priority assigned.

Outbound calls can be activated and deactivated at any time and account and campaign details can be viewed whenever required.

Tracking Calls and Actions

When a call is completed, the details of that call are stored within the *Call Tracker*. On completion calls can be automatically archived and closed or alternatively they can be left active and requiring further action. This action might be to arrange for an engineer to visit the caller on site.

Follow up actions can be assigned to certain conclusions within a callflow to drive the actions that are prompted for within the *Call Tracker*. Call details, including a history of any actions that have taken place, can be viewed at any time. In addition, calls that have been allocated a particular status can be viewed, which is useful for supervisors.

The *Call Tracker* is a useful tool for all members of the call centre. Agents can view a summary of outstanding calls and the appropriate actions that should be taken, while Supervisors can obtain an overall picture of calls and how they are being handled.

TACT or Synthesys Workflow

The Teams Augmented Call Tracker allows the filtering of active calls according to teams so that agents will only handle calls from campaigns assigned to their team.

TACT is also the start to a workflow system as calls can be moved between teams using the ***Pass to Team*** action. An agent taking an Inbound call can pass the callflow containing all call details to the sales team, who can pass it to the accounts department who in turn pass it on to be dispatched.

Reports and Campaign Management

In the *Campaign Manager,* accessed via the ***Reports*** module under the *Setup* heading of the Synthesys main screen, you can rename and delete accounts & campaigns, reset sessions, add and schedule reports, view report run histories and delete reports and report schedules.

Reporting options are as flexible as other modules in the system. Various report writers can be used to produce report formats, which can then be scheduled to run in the *Synthesys Campaign Manager.* Reports can be pre-scheduled, ad hoc or instantly generated and sent by e-mail, fax or modem to a designated printer or web address.

Standard Synthesys Modules

Setup:

- **Campaigns:** Provides access to the *Campaign Editor*, where you build callflows to provide agents with all the necessary information to present a professional and consistent approach to your customers when taking calls. Using the graphical interface you can design and implement callflows with the minimum of technical knowledge and experience.

- *Customer Relationship Management*, which allows access to both customer profiles and customer histories, providing the agent with the best possible help in dealing with customers' queries and requests.

- *The Call Tracker,* which allows you to view the details of any call stored on the Synthesys system. Follow up actions regarding a call can also be recorded and an accurate call history maintained. Details recorded during the original call can be modified if required.

- **Outbound*:*** Allows you to attach Outbound Lists to any callflow containing Customer Relationship Management and to place the customers to be contacted by the agents into a call queue, specifying the date and time frame during which the calls should be taken.

- **Reports:** Provides access to the *Campaign Manager,* where you can rename and delete accounts and campaigns set up in the *Campaign Editor* and schedule the running of reports produced using a recommended report writer. Reports can be based on any information stored within the Synthesys system.

Manage:

- **Personnel***:* Provides access to the *Personnel Manager*, which is used to set up and maintain user information, including staff records, user groups, user accounts. This module also controls user permissions that determine the extent to which individuals can use the Synthesys system.

- **Teams***:* Provides access to the *Team Manager*, used to assign individual agents to specific Inbound or Outbound lists, reflecting the skill level and expertise of the agents.

Monitor:

- **Live Monitor:** Provides *real-time* information of call centre activities. You can view the current state of all live campaigns that are running and observe individual agent activity within your call centre in real-time.

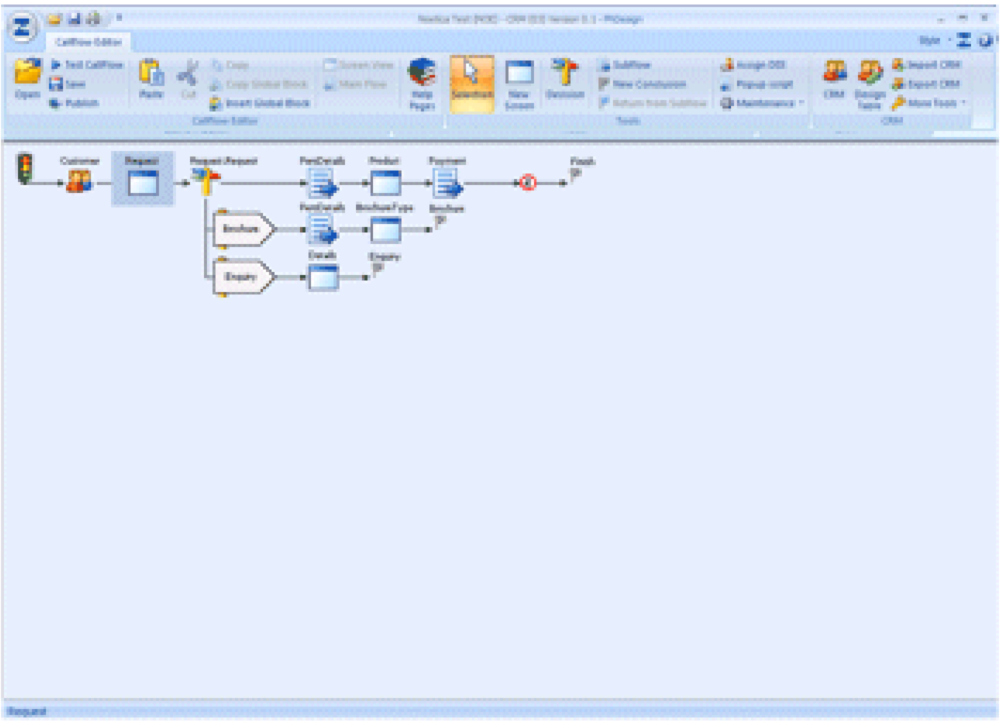
- **Reports**: Provides access to the *Report Viewer,* where you can add and view standard Synthesys reports or reports designed by your reporting team.

Agent:

- **Start Work***:* Used to run callflows that have been implemented within the call centre. The callflow then guides your agents through each stage of the call until the end is reached.

CAMPAIGN EDITOR

Callflow Design



Example Callflow: Product Order Line

CALLFLOW DESIGN

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 query 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.
- Construct web style context sensitive help pages, designed to provide 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.

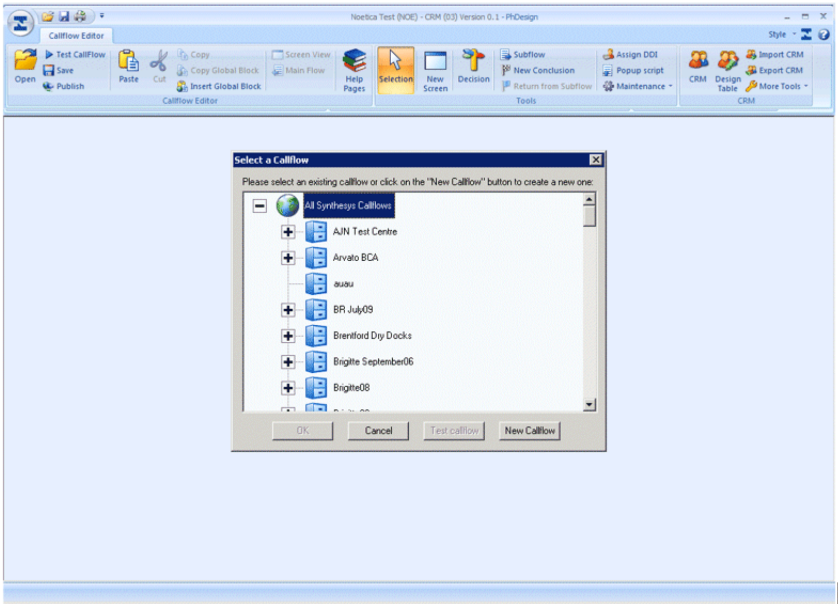
STARTING THE CAMPAIGN EDITOR

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.

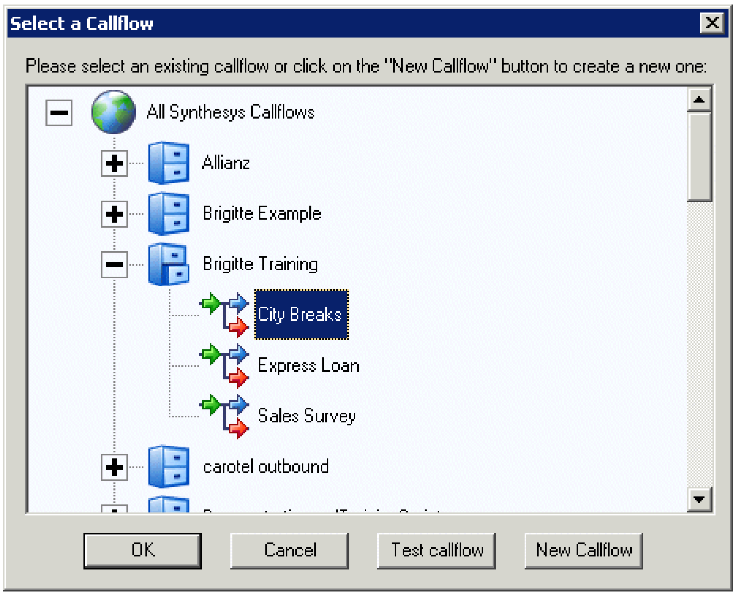


Understanding the Select a Callflow Screen

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*).

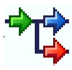
A callflow is created for each campaign you are managing and is stored under the appropriate customer account.

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 ⊞ 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.

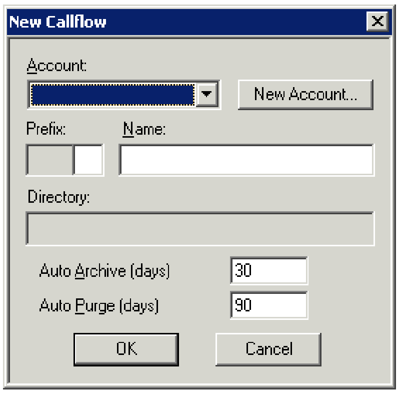
Click on the callflow that you want to work with.

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

Setting Up A New Account

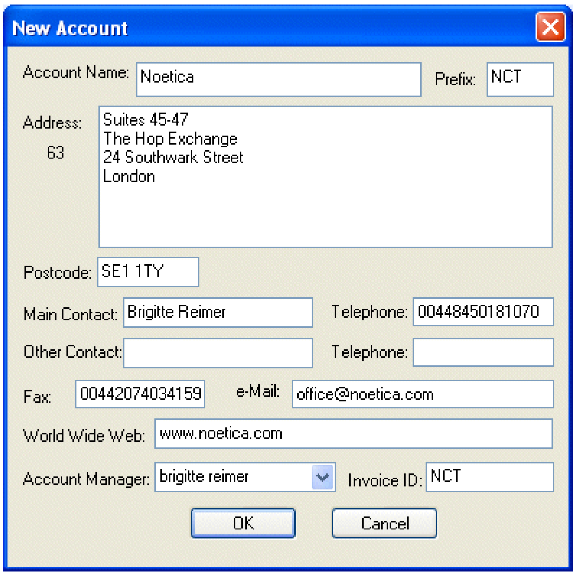
At the Select a Callflow screen:

- 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.

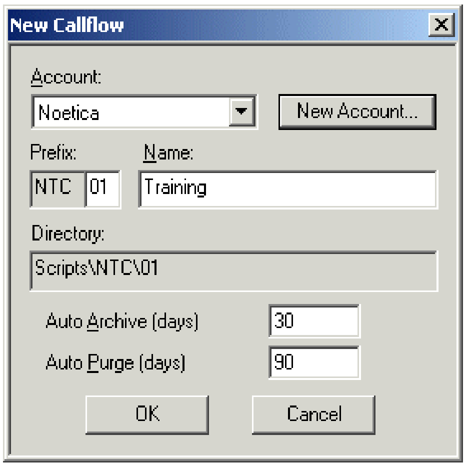


When you have entered the account details click OK to save the details and return to the New Callflow window.

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 days 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**.*

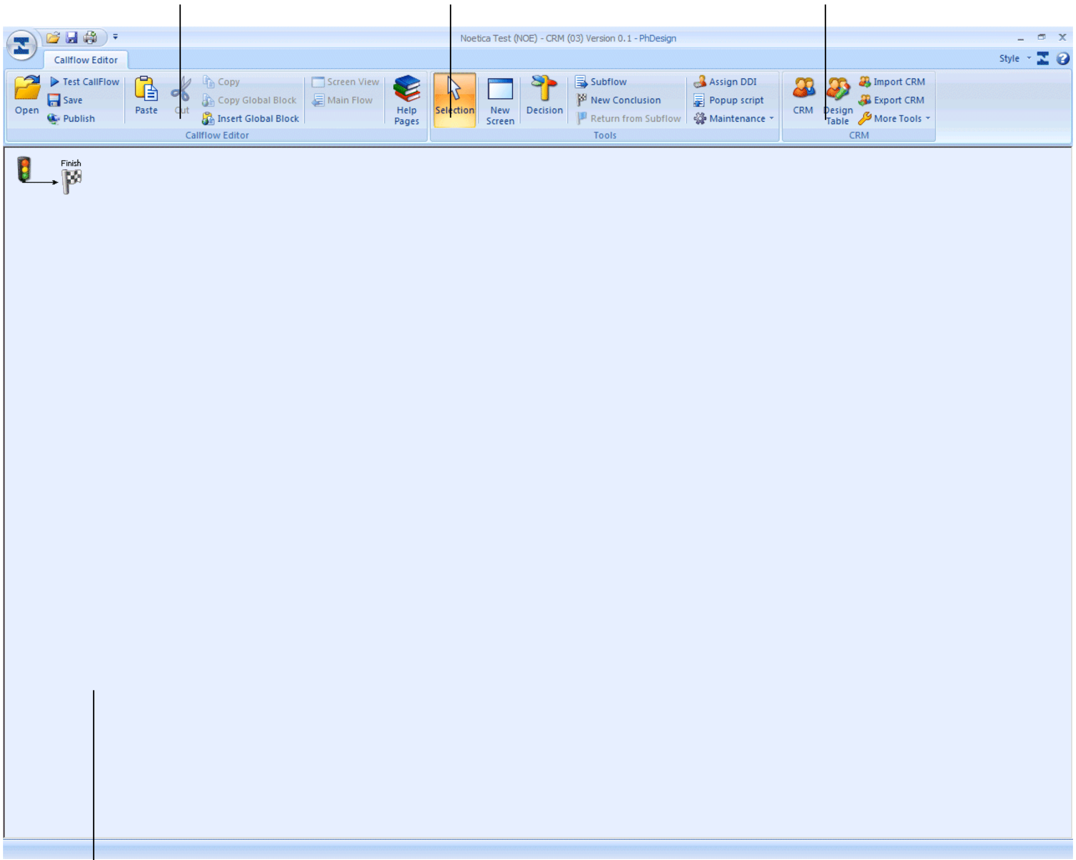
USING THE CAMPAIGN EDITOR MAIN SCREEN

To open the *Campaign Editor* main screen:

- Select your campaign in the ***Select a Callflow*** 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.

Callflow Editor Toolbar. Tools Toolbar. CRM Toolbar.



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.

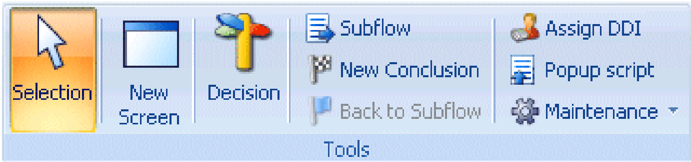
Via the More Tools drop down menu of the CRM toolbar users can access the Synthesys Global Gallery and can maintain the CRM, deleting selected CRM history events and unused CRM prefixes.

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

The Callflow Editor Toolbar

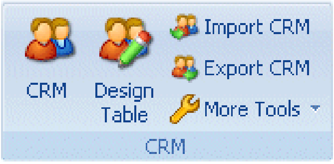
Option	Description
	**Open.** Display the *Select a Callflow* window. From this window users can open an existing callflow or create new callflow.
	**Test Callflow.** Testing of a callflow before it is published.
	**Save**. Save the currently displayed callflow. Callflows are automatically saved to the 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



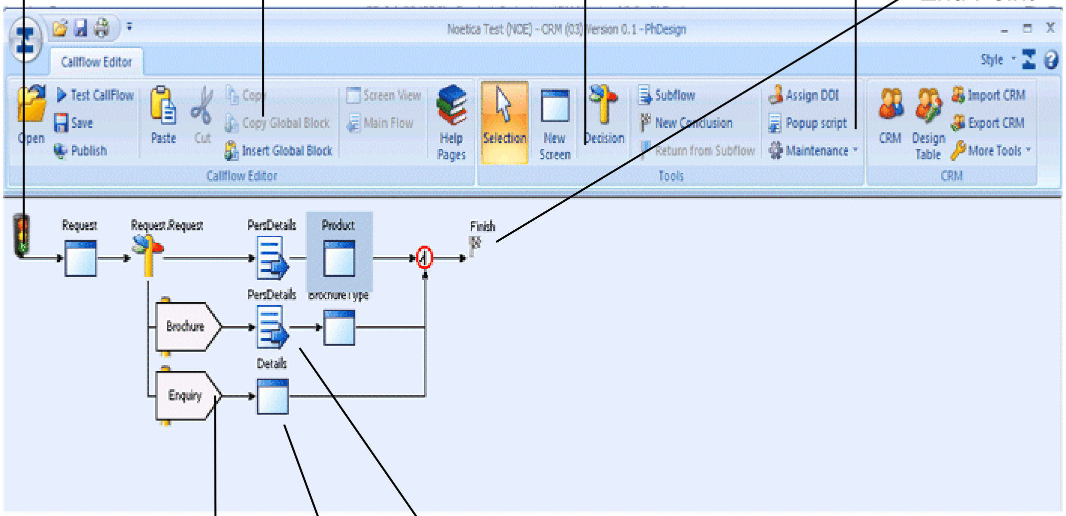
Option	Description
	**CRM.** Add Customer Relationship Management to a callflow.
	**Design Table**. Opens the CRM Design Table, where users add any data fields, as required.
	**Import CRM.** Opens the CRM Import wizard, guiding users through the process of importing customer data.
	**Export CRM.** Opens 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.

Starting Point
Callflow Editor Toolbar
Tools Toolbar
CRM Toolbar
End Point



Subflows can improve the efficiency of callflow design.

New Screen. Screens contain questions that are to be asked during the live operation of the callflow.

Branches illustrate the path through the callflow

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.

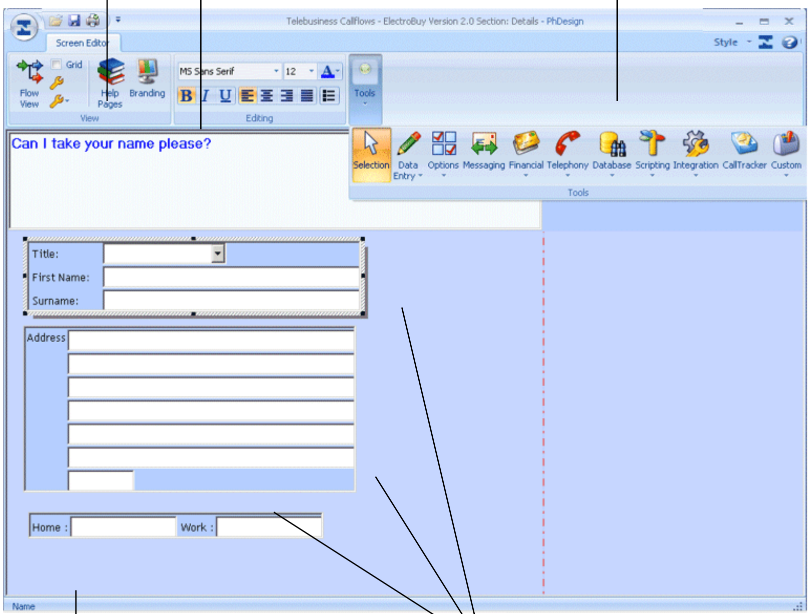
WORKING WITH A SCREEN

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*.

View Toolbar. Agent Prompt Box. Tools Toolbar with ActiveX controls.



Screen Design Area. ActiveX Controls.

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.

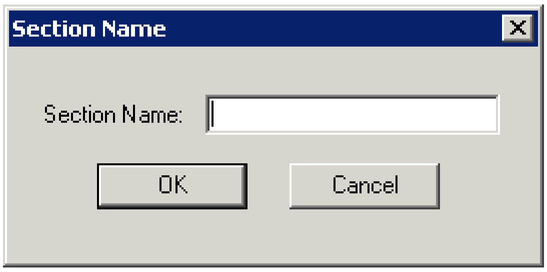
All ActiveX Controls placed in a screen must be contained within the red dotted lines. Anything you place outside the dotted lines may not display correctly at certain screen resolutions.

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
	Flow View. To return to the *Flow* view of the callflow
	Grid. To active the grid.
	Grid Settings. To change the density of the grid.
	Grid size. To enlarge the area in which you can place your controls
	Help Pages. To add web style help to the callflow.
	Branding. To set a background colour and branding for the whole campaign, or for individual screens.

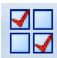
Editing Toolbar

Option	Description
	Apply bold to the selected text. Click on the button again to remove bold from the selected text.
	Apply italics to the selected text. Click on the button again to remove italics from the selected text.
	Apply underlining to the selected text. Click on the button again to remove the underlining from the selected text.
	Change the Foreground colour of the selected text using the standard colour palette that comes with Windows.
	Align Left.
	Centre.
	Align Right.
	Bullet.

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.

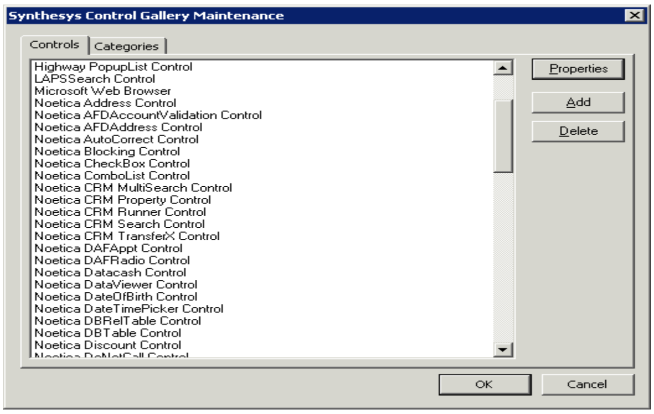
For more information about adding selected controls to the above control categories, please see the next page ***Configuring the Tool toolbar***.

Configuring the Tools Toolbar Categories

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

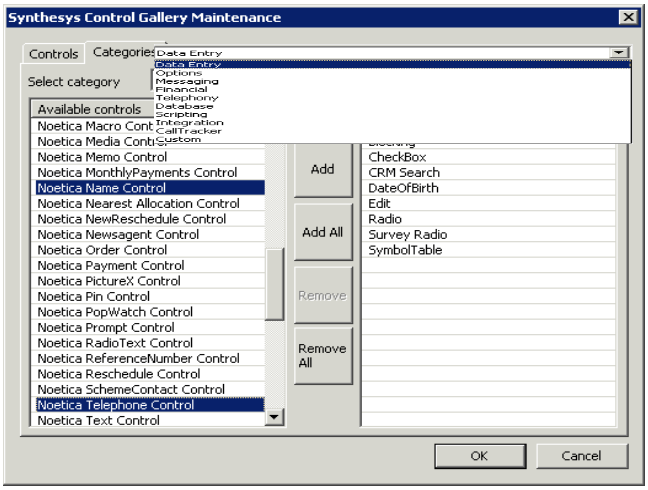
- Return to the **Main Flow** of the Campaign Editor.
- Click on Maintenance on the Tools toolbar and select the Maintain Synthesys Controls Gallery.

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.

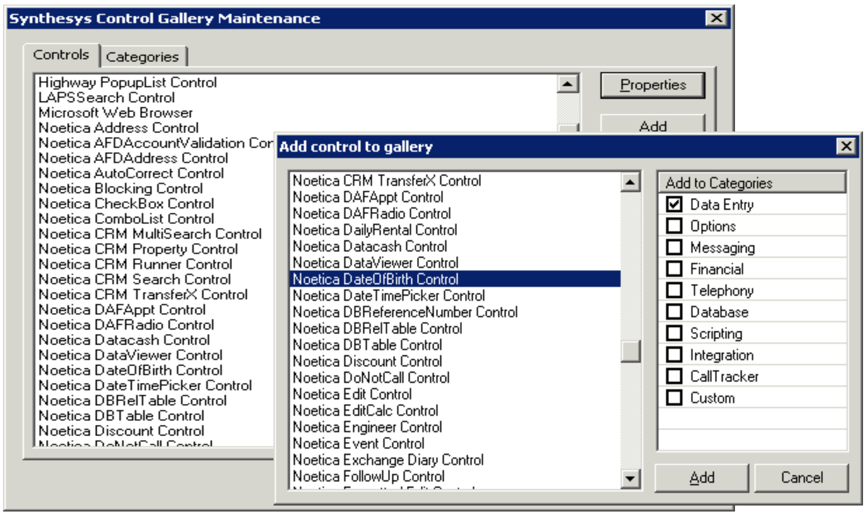
Use the ***Remove*** button, to remove selected controls, or the ***Remove All*** button, to remove all controls.

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 [Add] to display the *Add Control to Gallery* window to display all registered *ActiveX Controls* that are installed on the *Synthesys* server:

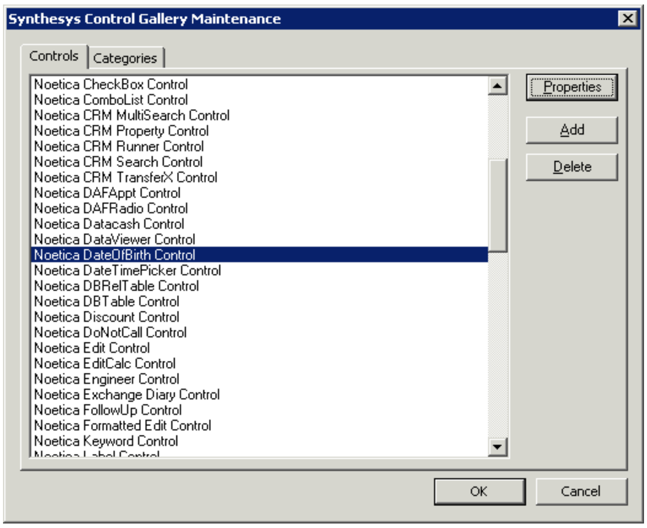


Select the required control and Category click on [Add]. The selected control is added to the category list. ***Please see the next page to configure the control.***

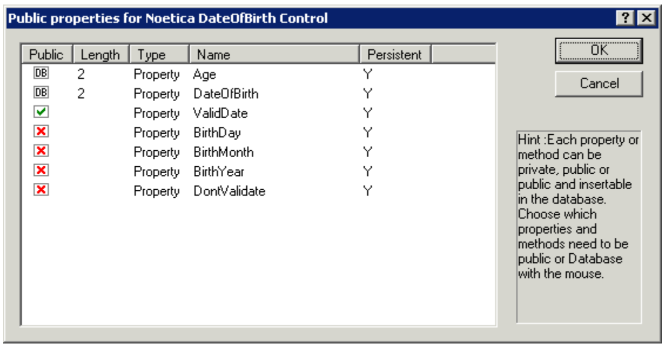
If the control you wish to add to the Gallery is not displayed in this list then the control has not been placed into the Synthesys\bin directory on the Synthesys server -or-
The control has not been registered on the local machine. When the .ocx file of the required ActiveX Control is placed within 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.

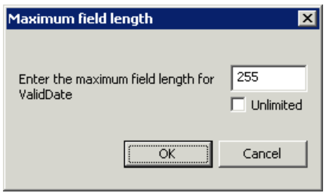


- The *Public Properties* window for the selected control will be displayed:



- 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 OK. This makes the property both public and its value can be stored within the *Synthesys* database.

- Click on OK 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](\\Server\Synthesys\etc\Custom)

Branding.inf - Notepad

File Edit Format Help

```
; 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

[SynTabCtrl]
SelectedTextColour=0,0,80
SelectedTabColour= 255,255,300
; Font is any Windows font. Second parameter is point size*10. Third can be
;FW_BOLD, FW_THIN, FW_EXTRALIGHT, FW_ULTRALIGHT, 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
IdlePicture=%LOCAL%\bin\Runner.jpg
IdlePicturePosition=Stretch
MinimumPromptLines=4
;CTIToolbarDocking=Top
CTIToolbarDocking=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.

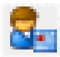
Application Launcher is used to link Synthesys to other applications by launching target applications at strategic points in the callflow when talking calls.

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.



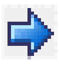
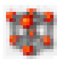
Date of Birth allows the capture of a caller's date of birth.

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.

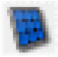
Data Viewer displays information from a data table or view in a grid format and allows agents to select existing records and to create new records.

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.

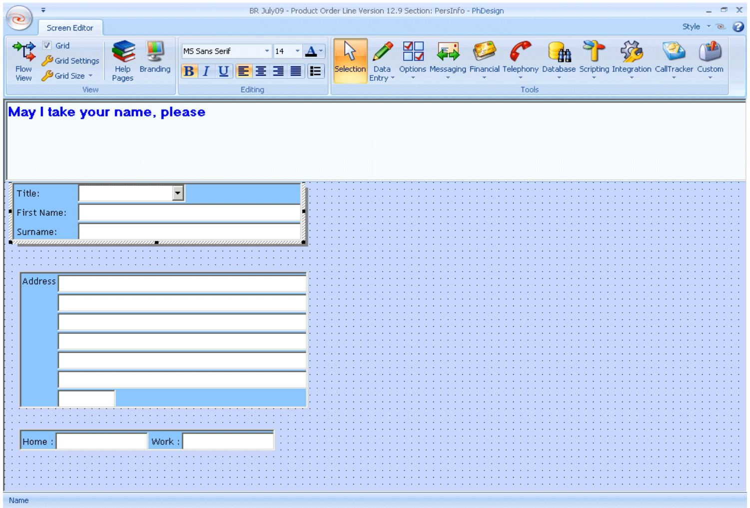
THE SCREEN DESIGN AREA

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

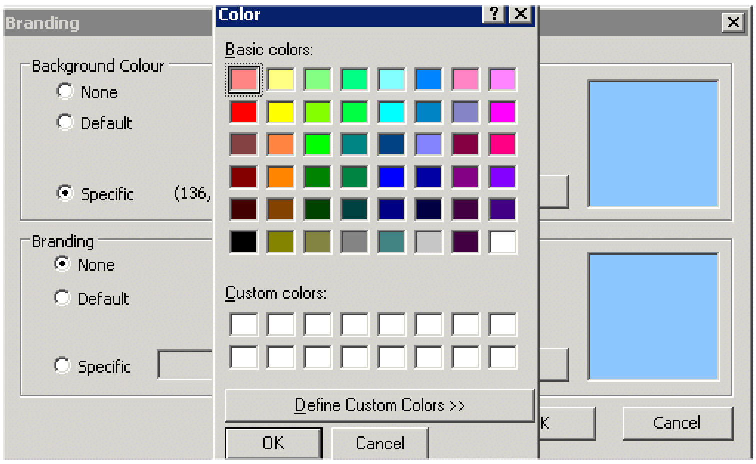
You can set a background colour and branding for the whole campaign, or for individual screens.

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.



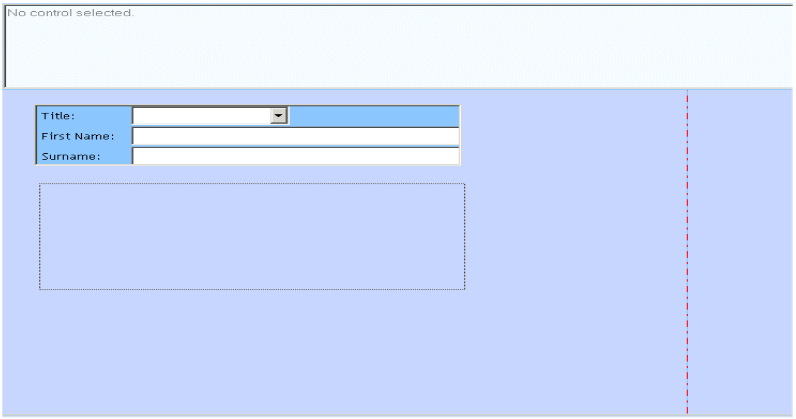
Branding Image

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

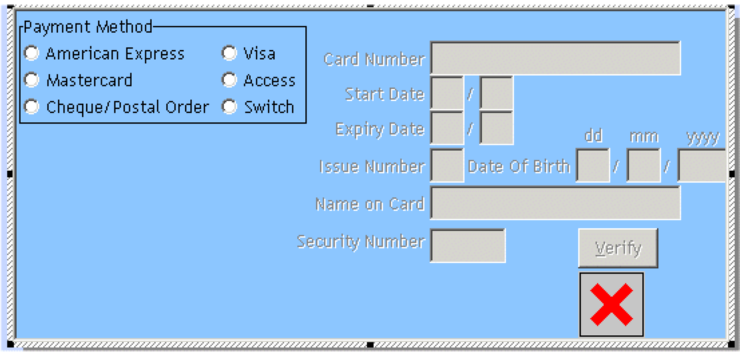
When a control is selected from one of the category folders on the Tools *Toolbar* and placed within a screen, it looks very much as it does in the Agent view, when the live callflow is run.

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.

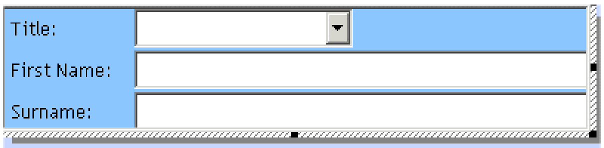
Radio buttons,
from which one selection can be made



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

Example 2: Name

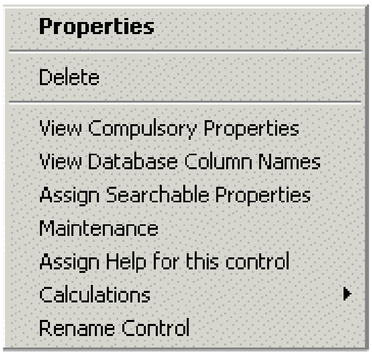
This control is created using the *Noetica Name Control* option. The control displays input fields for a client name.



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:



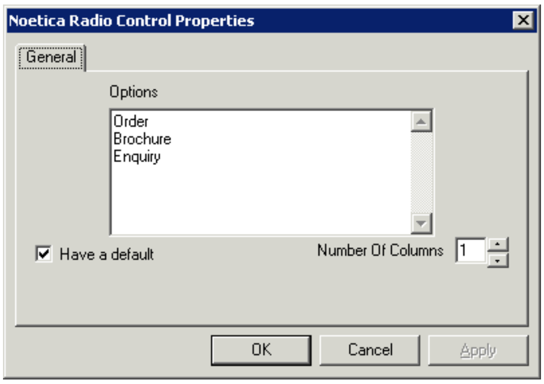
See below for a brief description of the main options available from this pop up menu.

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.

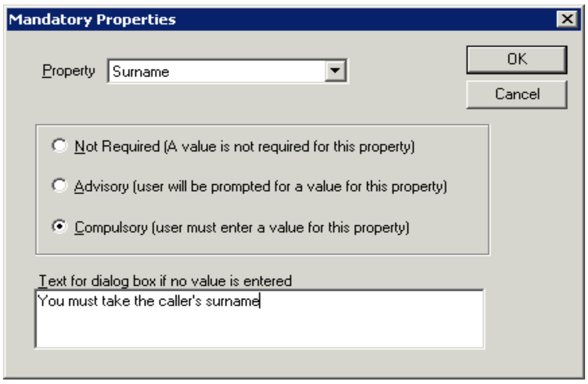


Compulsory Fields

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:

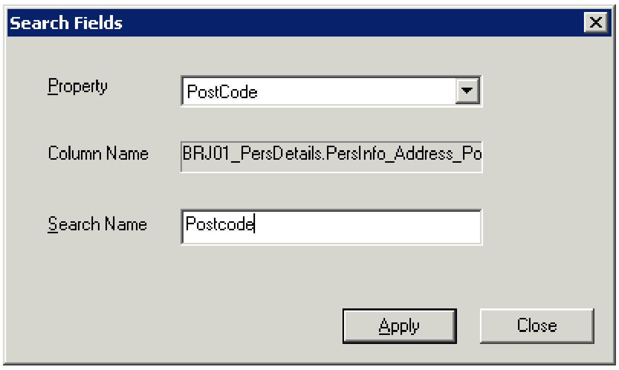
- In the *Mandatory Properties dialog* of the control, select ***Surname*** from the *Property* drop down menu
- Select the ***Compulsory*** option and in the text field subsequently enabled, ***add a clear instruction*** for the agents.



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.

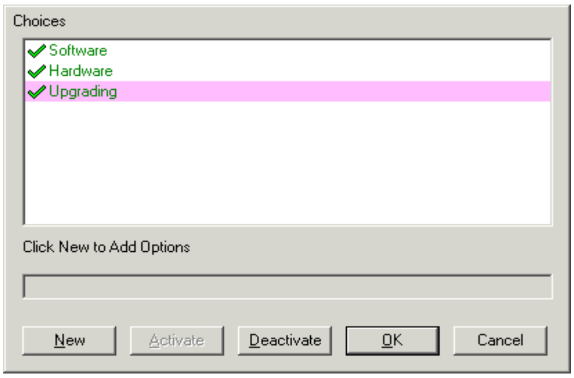


Maintenance

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:

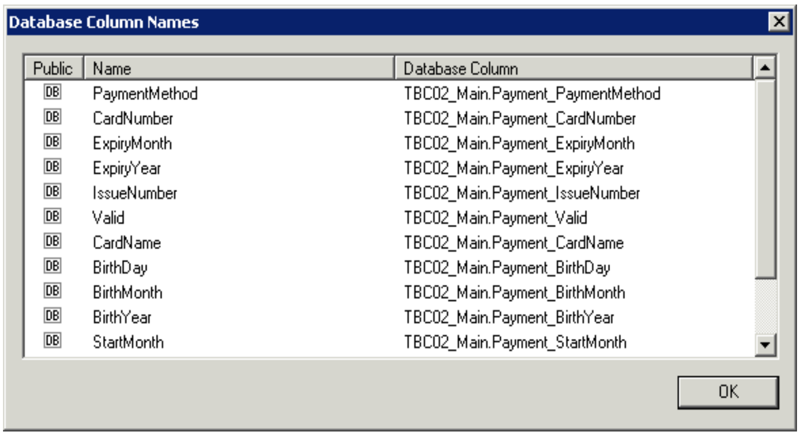


View Database Column Names

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.

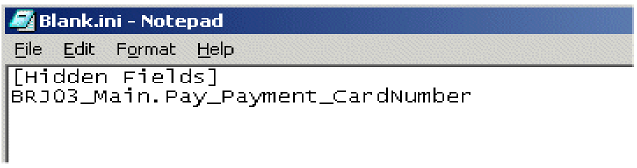
- To hide the database column name and script property name from view as well, the permission ***Modify Hidden Fields*** must be removed from the *Current Permissions* box for the Agent group and placed back into the *Available Permissions* window.

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.

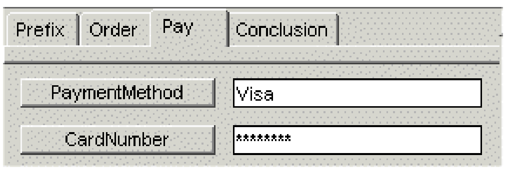
To check the table and column name for the control either right click on the control in the screen view in the Campaign Editor or look it up in the database.



Appearance of 'Hidden Fields' in the Call Tracker

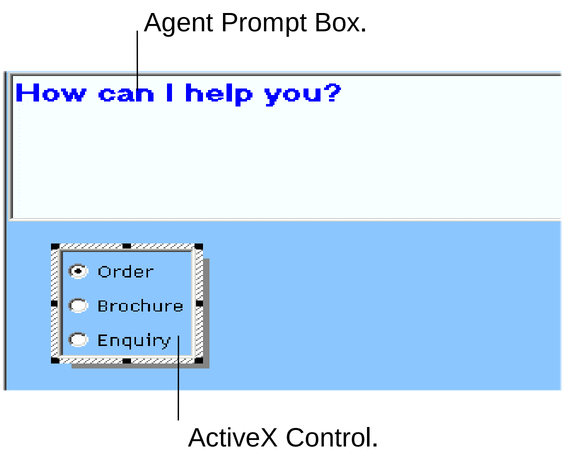
When agents access the Call Tracker, any 'hidden' information entered in the Blank.ini file can't be viewed by agents without the 'View Hidden Fields' permission.

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*.

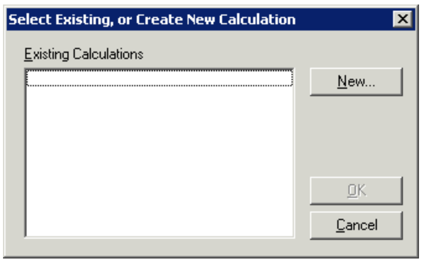
For an example of a calculation substitution see next page.

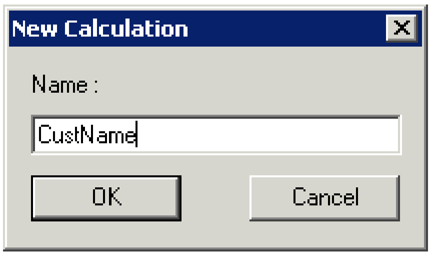
NAME SUBSTITUTION

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

- 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.

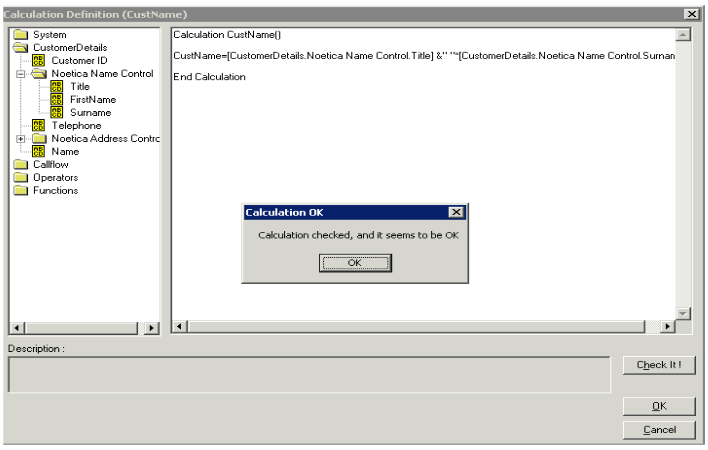




- In the *Calculation Definition* window, select and open the folder that contains the screen used to collect the caller's name.

- 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.



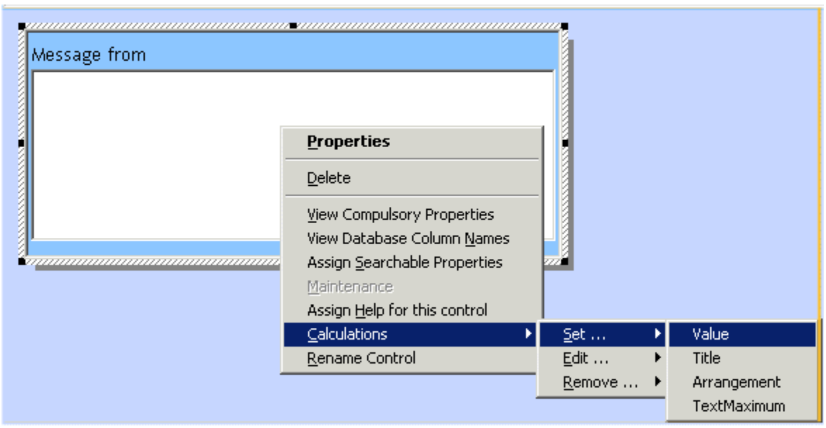
Check your calculation by clicking the *Check It* button.

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.

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.

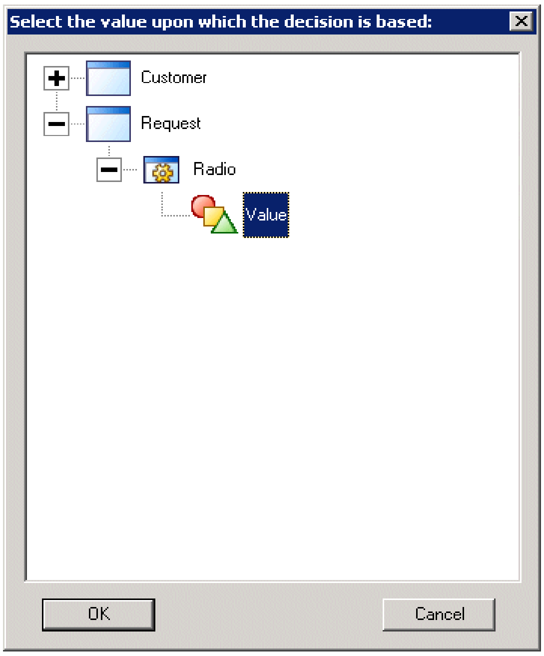
DEFINING BRANCHING

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.



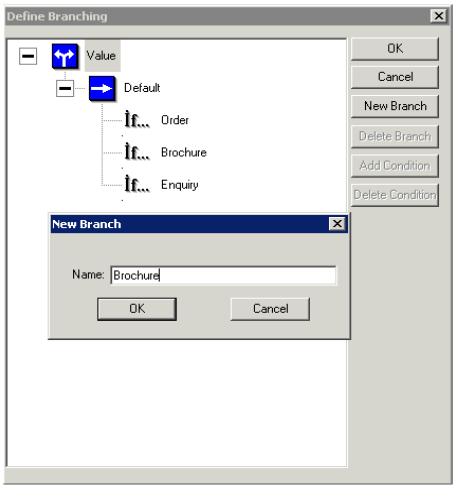
An icon representing the Request screen, along with a ⊞ sign is displayed at the top of the window.

- 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.

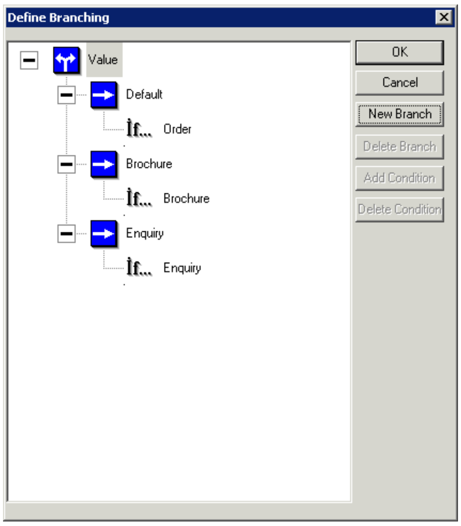


In our example we have created a brochure and an enquiry branch.

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.

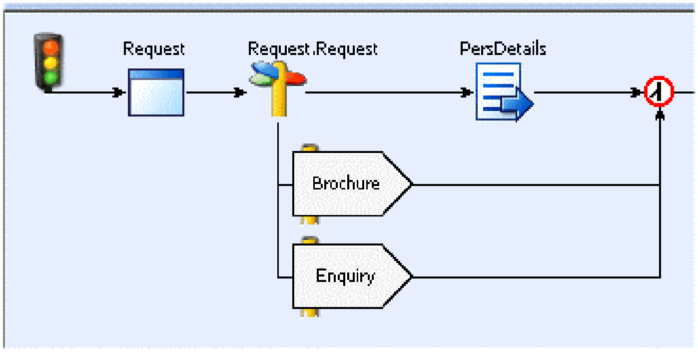
Return to the Main Flow and save  your callflow.

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.

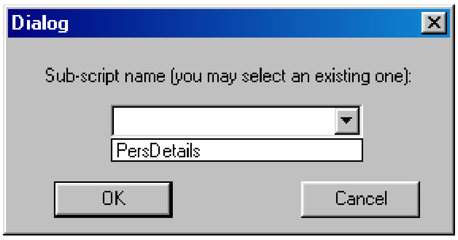
Reusing existing Subflows

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

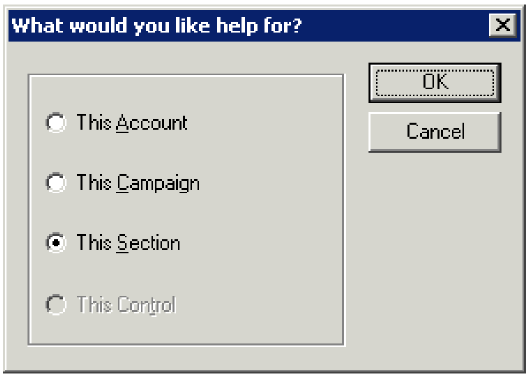
Context-sensitive help pages can be created using any Web Page/HTML Editor, to offer additional support and advice to agents when taking calls. For example, you could create and assign help pages to an *Order Control* showing product listings and examples of the products that are available.

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:

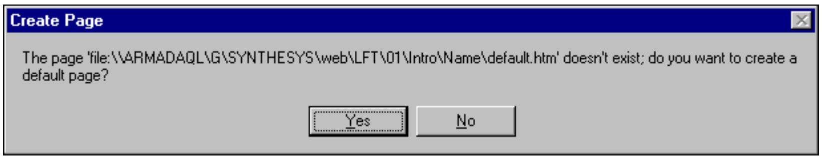


This Account	If you assign help to the account, the help will be available for all Callflows that are created for the account.
This Campaign	If you assign the help to the whole campaign (Callflow), the help page will be available at any point during a call.
This Section	If you assign the help to the 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 OK.

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.

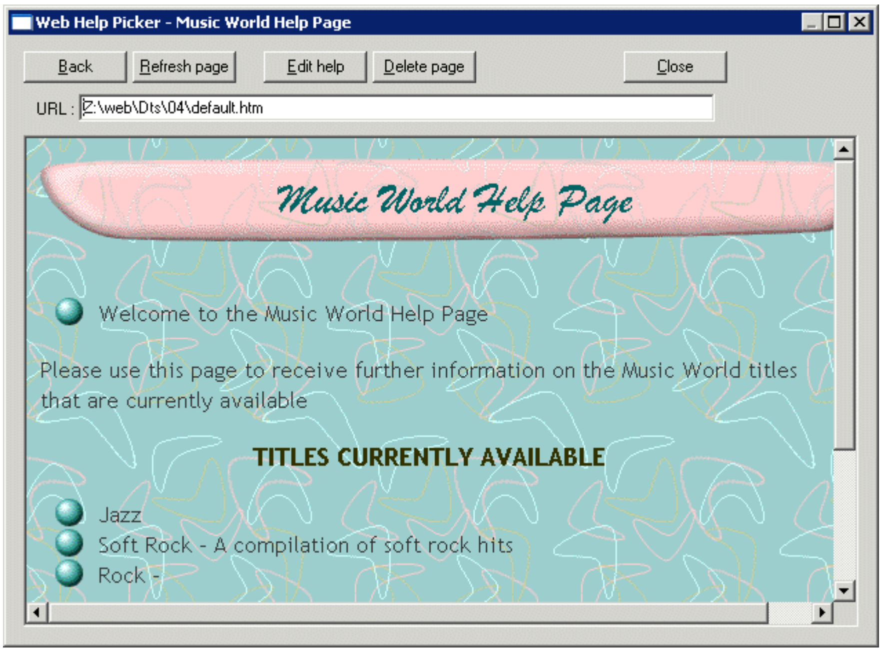
For example:



Click Yes 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.

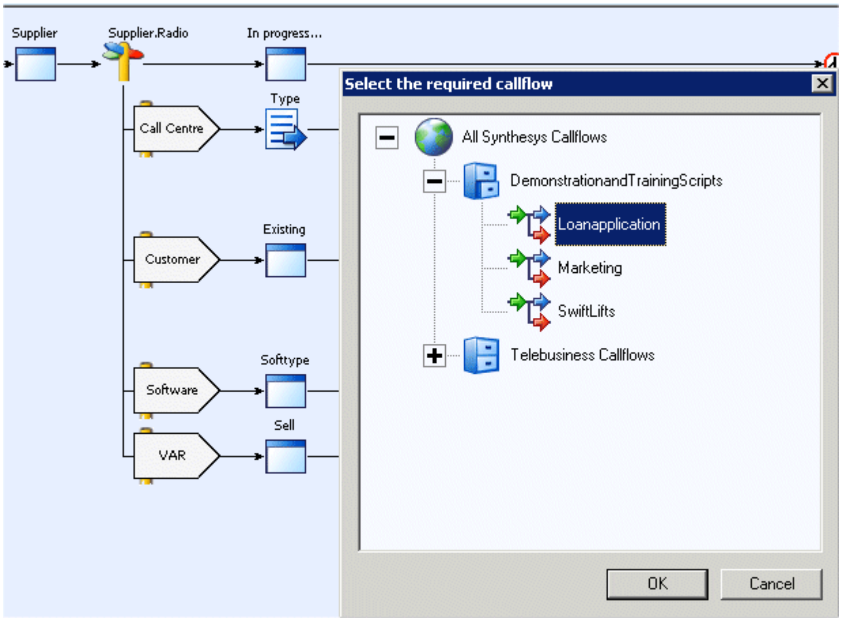
Deleting Global Blocks

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.

POPUP SCRIPTS

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.

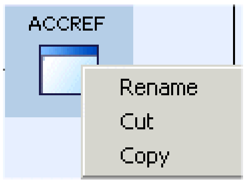
To enable agents to launch the Popup script when taking calls, please ensure that the main callflow and the Popup script is in their Team.

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:



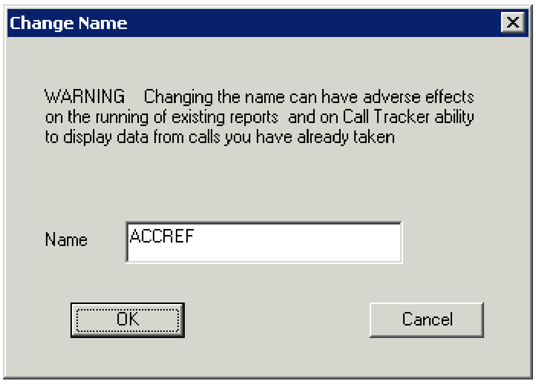
- Right click on the screen or subflow and select ***Cut*** or ***Copy*** then
- move to the position where you wish to paste the screen or subflow, right click and select ***Paste***

Or

- Highlight the screen or subflow and use the ***Cut*** or ***Copy*** icons  on the *Callflow Editor* toolbar, then
- select the ***Paste*** icon  on the *Callflow Editor* toolbar, move to the position where you wish to paste the screen or subflow and select ***Paste.***

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.

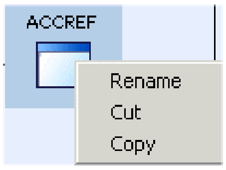
You will be unable to cut and paste a screen or subflow if there are decision and branches based on the selected screen or subflow.

RENAMING SCREENS AND CONTROLS

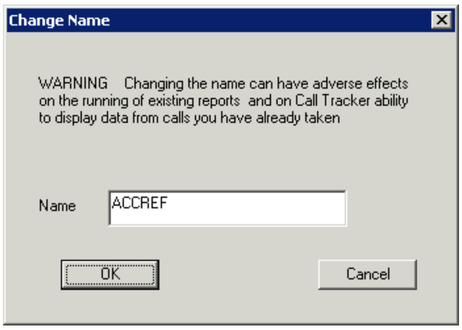
When adding or renaming screens you must notify the person responsible for setting up your reports, as they will have to be updated to display the required information.

Renaming Screens

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

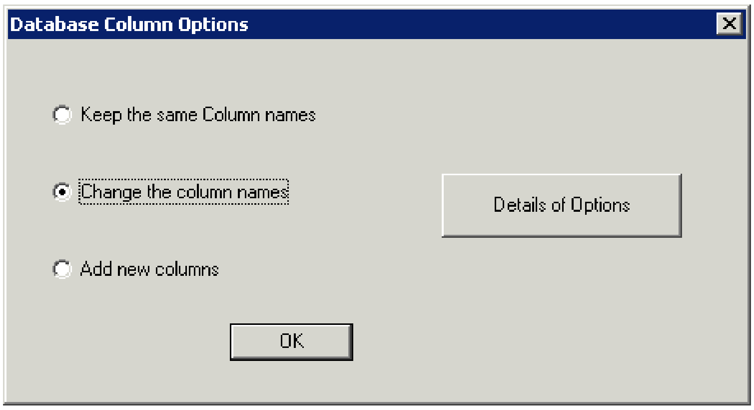


In the ***Change Name*** window type in the new name for your screen, then click OK.

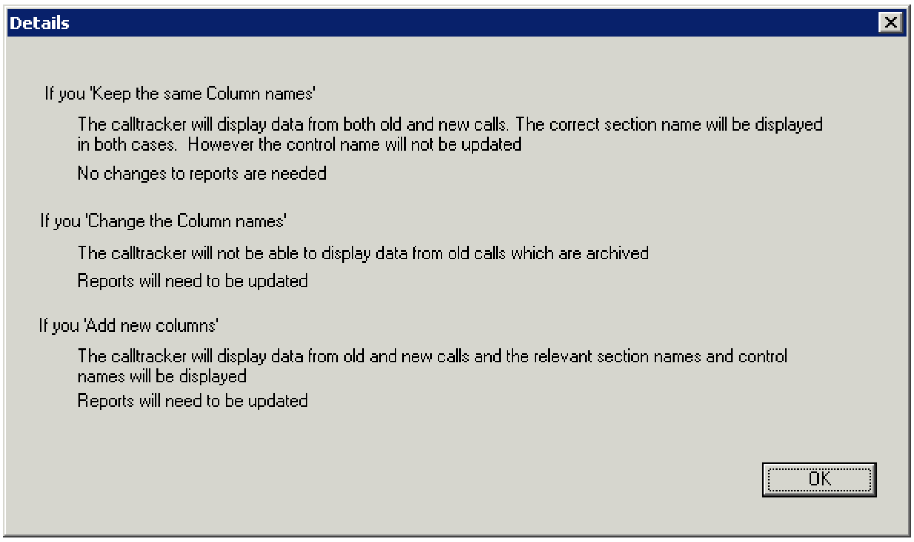


In the *Database Column Options* window, select whether you wish to 'keep the same Column names', 'change the column names' or wish to 'add new column names'.

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

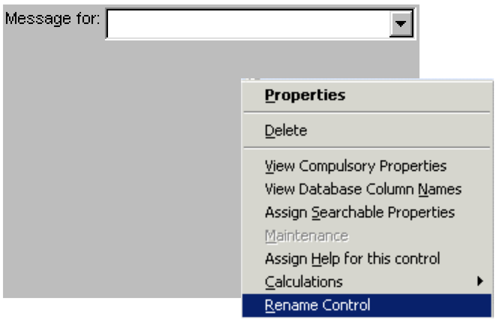
- Only information taken under the new screen name can be accessed in the Call Tracker.
- If you change screen names you have to replace the old column names with the new column names in your report folder.

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.

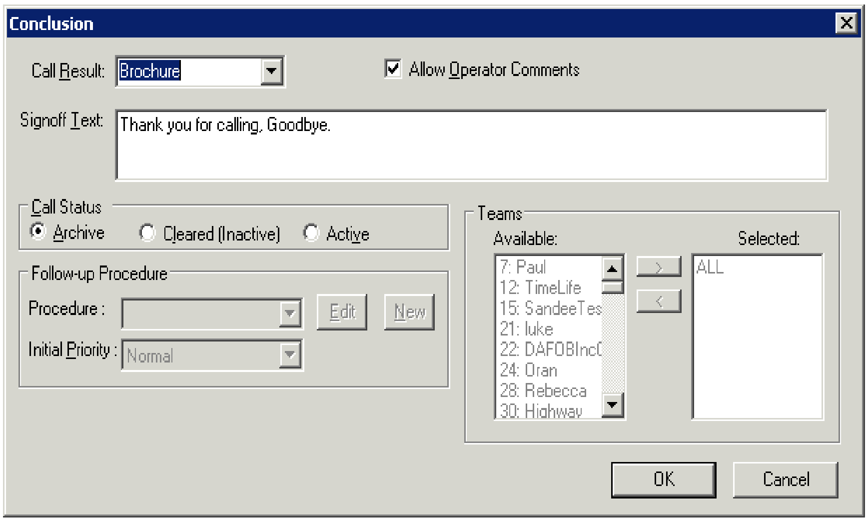
A call may for example have different branches for ‘Order’, 'Brochure Request' and 'General Enquiry'.

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.

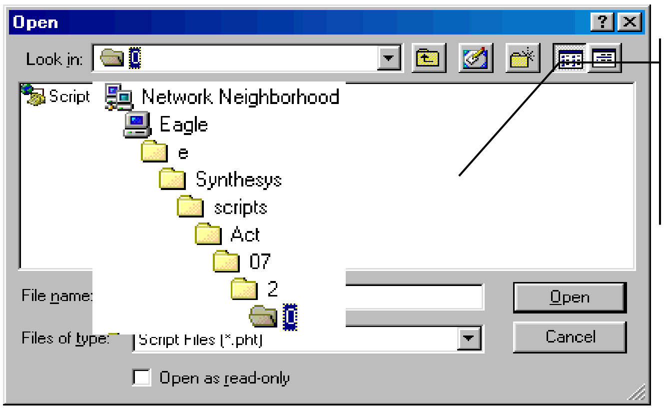
- Click on ***Import .PHT*** file.
- A message will inform you that this will override the existing callflow.
- Click ***Yes*** to confirm that you wish to replace the currently open callflow with the callflow you are about to import.

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.

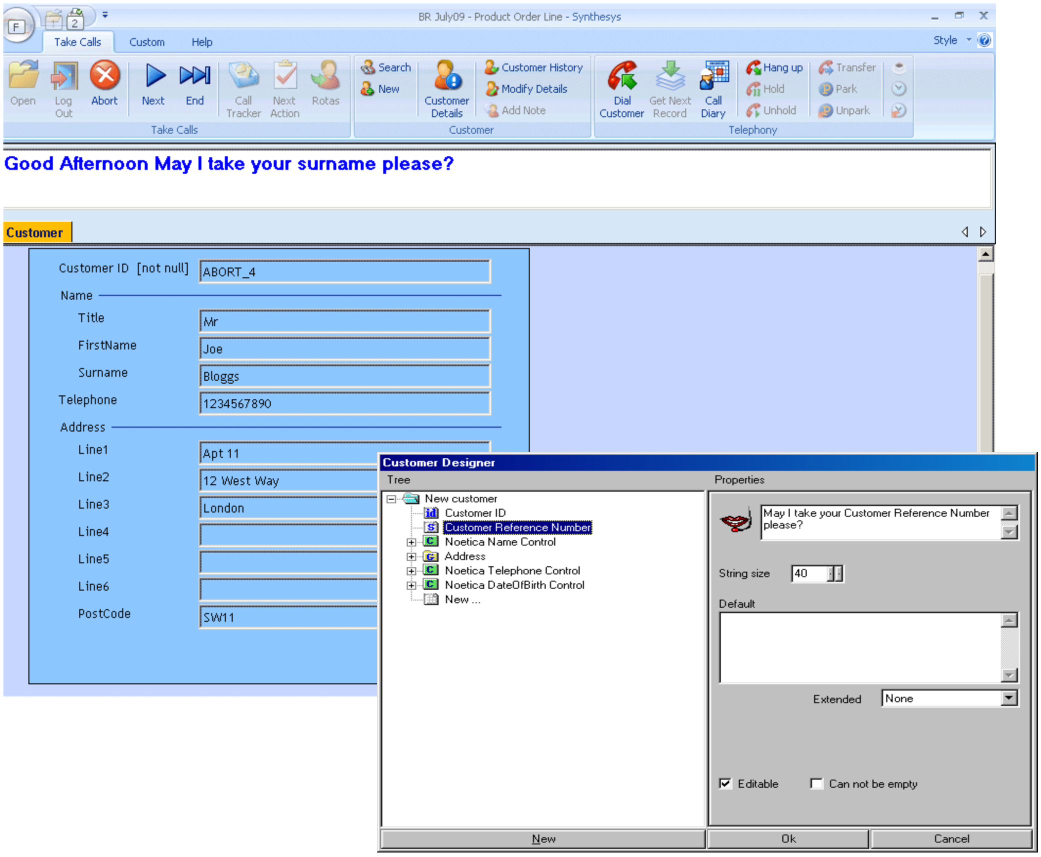
When you double click on 

.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.

CUSTOMER RELATIONSHIP MANAGEMENT

Customer Details



CUSTOMER RELATIONSHIP MANAGEMENT

Introduction

The Customer Relationship Management module is designed to allow access to both customer profiles and customer histories, providing the agent with the best possible help in dealing with customers' queries and requests.

Customer Relationship Management fully integrates with the other functions of Synthesys and allows the agent to view data from a variety of sources.

To the agent the Customer Relationship Management module behaves like another screen of the callflow. Within this screen the agent is able to search for existing customers by entering any known details, such as a telephone number or a name, or simply the first letter of the surname in combination with wildcards (*).

Once the customer has been identified all information previously collected can be accessed and will be available to the agent throughout the call. This can include the customer's personal details and previous contact with the company, as well as the reasons for the call, i.e. brochure request, order or query etc. Agents can also attach notes or documents with information relevant to a customer to a customer record.

In addition to searching for customer details and viewing a customer's history agents can create new customer records following prompts in much the same way, as they would do in a normal callflow run.

Customer interactions can be tracked and viewed in both in-bound and out-bound calls.

ASSIGNING CRM

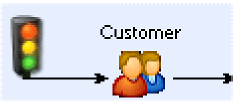
The CRM (Customer Relationship Management) contains the customer data and is usually placed at the beginning of a callflow, directly behind the traffic light.

Select ***Campaigns*** under the **Setup** heading of the Synthesys main screen and open the campaign for which you want to add the CRM.

- In the *Campaign Editor,* click your left mouse button on the CRM  icon on the ***CRM*** **toolbar,** to pick up the CRM**.**

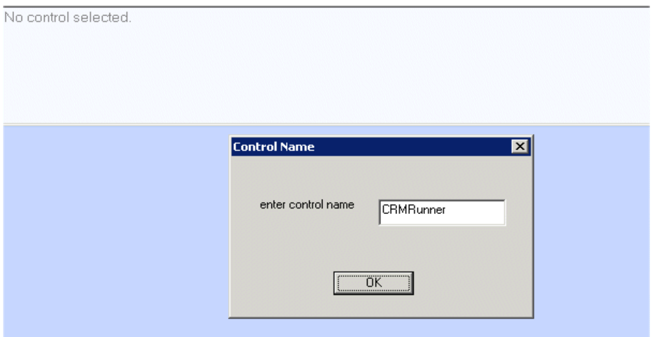
- Place your cursor directly behind the traffic light and add the CRM to your callflow with a click of the left mouse button.

- Enter a short descriptive name for the CRM.

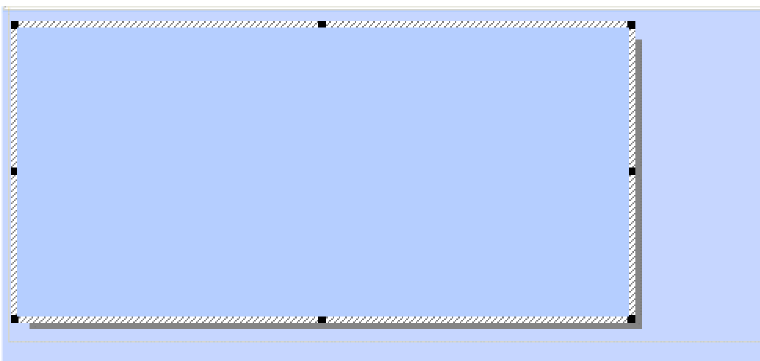


- Open the CRM screen view with a double click of the left mouse button.

- Enter a name for the CRMRunner control and click OK to add the control.



Until you have created the CRM table in the controls *Maintenance* page, no information will be displayed.

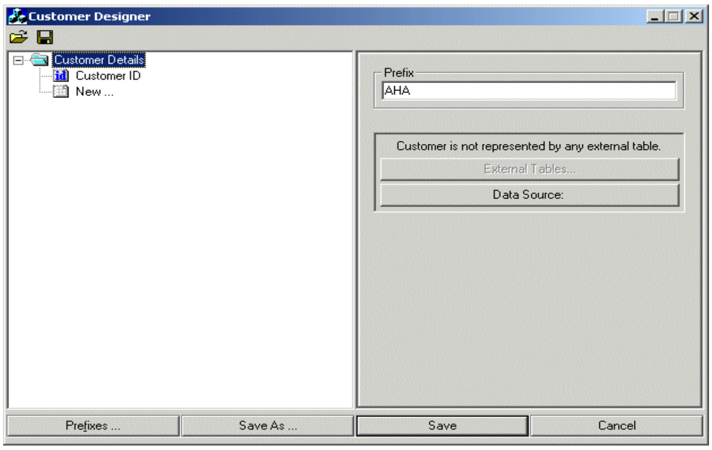


See next page for designing the CRM table.

Creating a new CRM Table

To open the CRM Designer dialog and to set up a new CRM table:

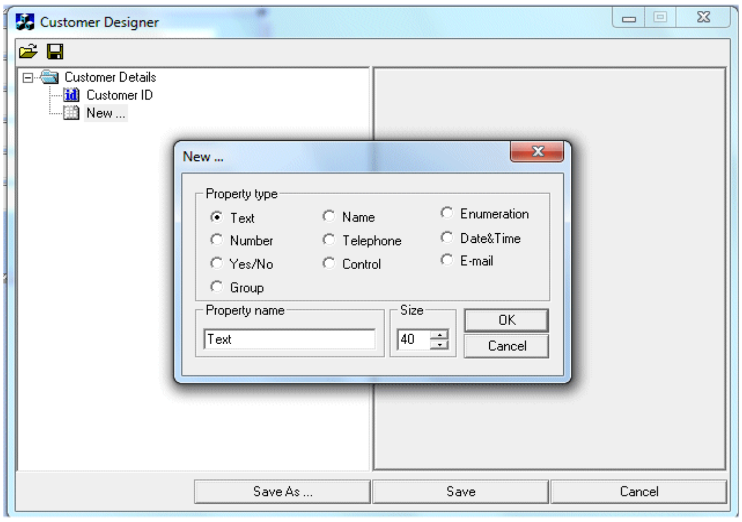
- Click on the Design Table icon on the *CRM* toolbar or right click on the control and select ***Maintenance*** from the drop down menu.
- Select *Customer Details* on the left side and enter a unique prefix into the ***Prefix*** window on the right. The prefix can contain up to 6 characters.



Enter your unique CRM Prefix

For external Data Source option, see section 'CRM & External Database Link'.

- Next, expand the 'Tree' structure, double click on ***New*** and create your CRM table using the property types in the *New…* window.



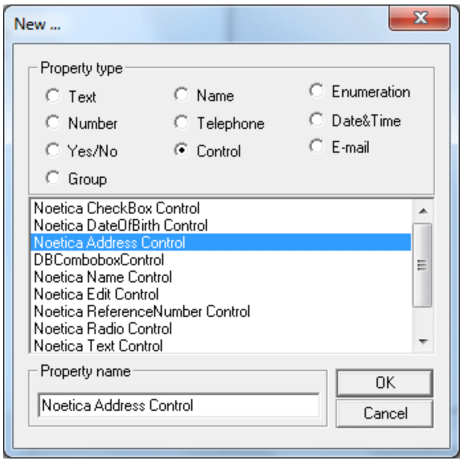
To enable CTI Auto Search you must use the Noetica Telephone control or Telephone field to capture the customer's telephone number and the Email field to capture the email address when using Email OB campaigns as part of your recycling rules.

To display the customer's name when parking/un-parking a call, you must use the Noetica Name control or the Name field.

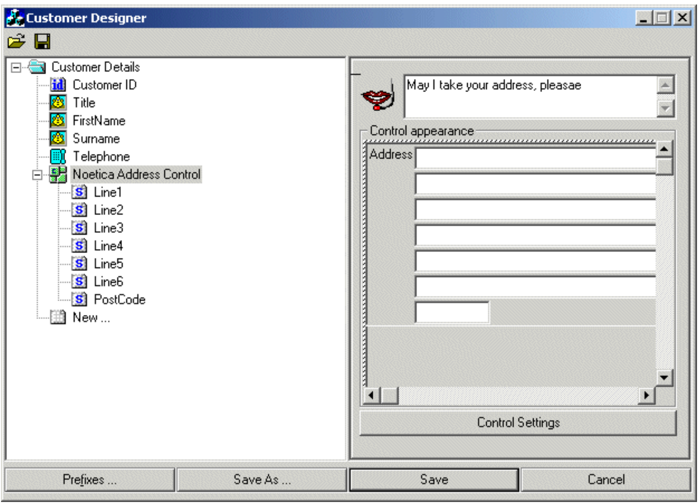
Adding a Noetica Control to your CRM

In the *Customer Designer*, highlight **New** in the tree structure on the left-hand side to display the ‘New’ window.

- Select **Control** in the *Property type* section and from the list displayed
- Select the required Noetica control and click OK.



The selected Noetica controls will now be displayed in the Customer Designer.



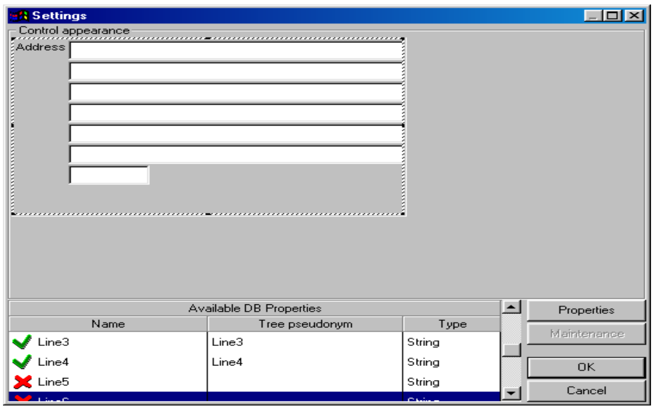
Remember to use the Telephone field or the Noetica Telephone control to capture the customer’s telephone number and email address to facilitate CTI Auto Search and emails as part of advanced recycling rules.

Use the Noetica Name control or the Name field, to display the customer’s name when parking/un-parking a call.

Editing Noetica Controls

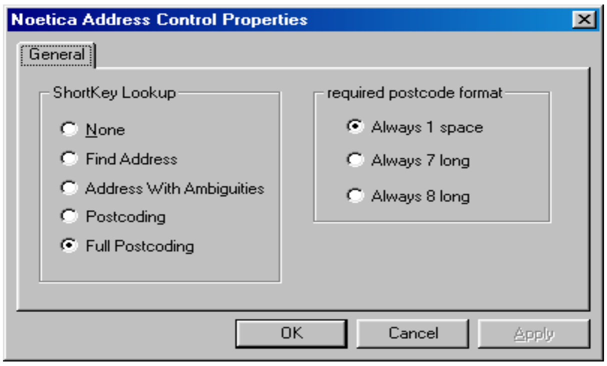
To edit the properties of a Noetica control:

- Click on the **Control Settings** to open the Settings window.
- To remove available DB properties, double click on the green tick in the *Name* column of ***Available DB Properties***, turning the tick into a red cross.



- To display the *Properties* window of a control, click the ***Properties*** button in the Settings window.

In the Address Control Properties window adjust your Address control as required.

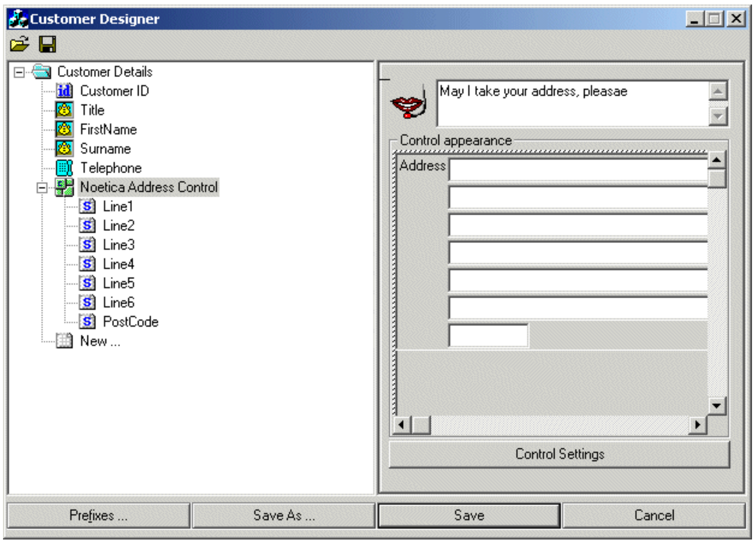


- Click OK to return to the Customer Designer window.

Entering Agent Dialogue

To enter the agent dialogue for the individual controls:

- Select the relevant field on the left-hand side of the Customer Designer window, i.e. ***Address***.
- Type the appropriate prompt on the right-hand side: ***May I take your address, please***?



Saving the CRM Table

Having designed your table:

- Click **SAVE**, to publish your CRM table.
- Click ***Yes*** to the message ***Are you sure you want to modify customer structure***, if you have changed an existing CRM table

Saving a CRM Table under a new Prefix

Using the **SAVE AS** option, users can save an existing CRM under a new prefix, thus creating a new CRM table.

This way, the CRM fields of the original prefix are retained, but without the associated customer data.

Properties: Settings & Customisation

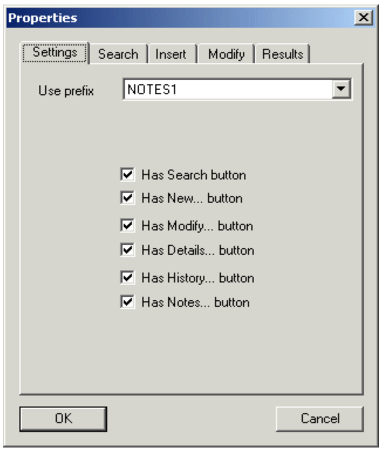
To configure the appearance of the CRM table:

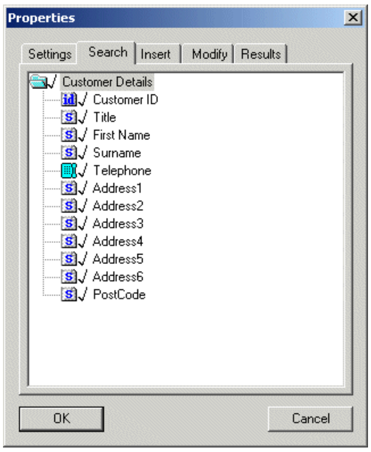
- Right click on the CRMRunner control and select **Properties** from the drop down menu.

In **Settings**, your CRM prefix will be displayed automatically.

- Placing a tick into the available options ‘Search’, ‘Insert’, ‘Modify’ and ‘Results’ will enable the corresponding icons and allow agents access to the associated information when taking live calls.

- Placing a tick against the fields in the CRM table under the specific headings will display the information to the agents when taking live calls.





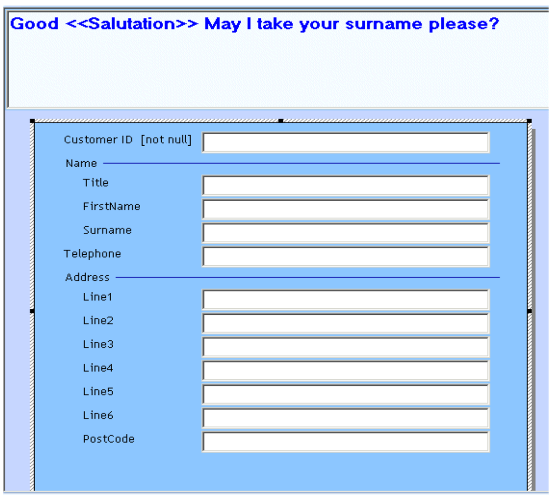
Search: Fields enabled for customer search.

Insert: Fields enabled to enter new customer details.

Modify: Fields enabled for updating customer records

Result: Fields displayed in the ambiguity list.

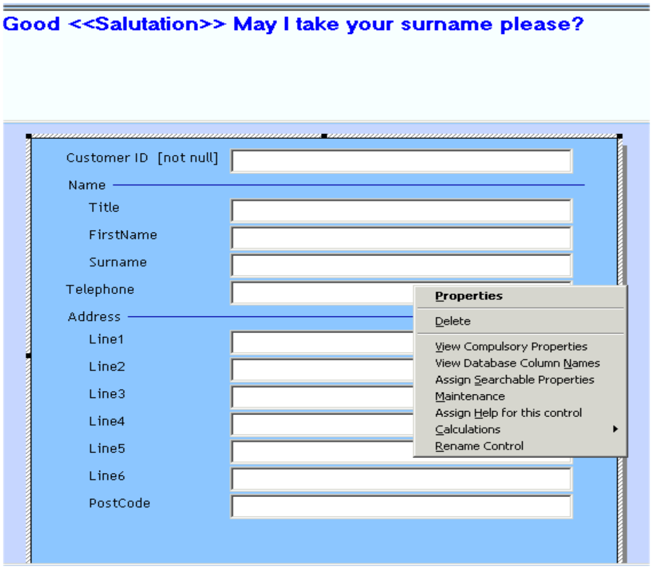
- Click OK to display your CRM.
- Enter the text for the CRM into the agent dialogue box.
- Return to the Flow View in the Campaign Editor and save and publish your callflow, before taking a call in the Agent view.



Viewing & Editing a CRM

To view or edit an existing Customer Relationship Management table:

- Double click on the CRM section in the Campaign Editor
- To add, edit or delete fields in the CRM table, right click on the CRM and select **Maintenance** to open the Customer Designer
- To view or configure the settings in your CRM table, go to **Properties,** where you need to tick any newly added fields to display them to the agents when running a live call.



Picking up an existing CRM Prefix

To reuse an existing CRM table prefix, together with all associated customer data:

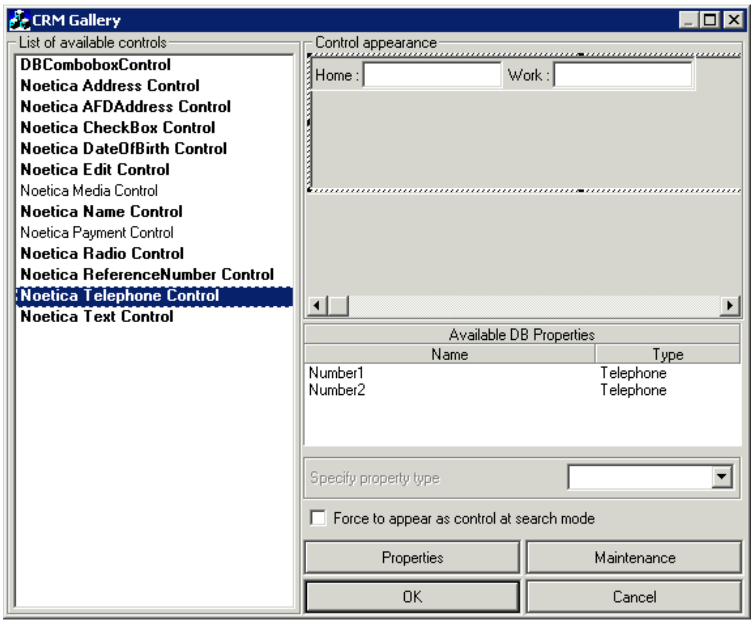
- Pick up the CRM icon  from the CRM toolbar in the Campaign Editor.
- Place it into the callflow and give it a short descriptive name.
- Double click on the CRM section and add a name for the CRM Runner control.
- Right click on the control, select **Properties** from the drop down menu
- In the Properties window **select the required prefix** from the drop down window.
- Next, tick the CRM fields that should be displayed when taking calls.

The CRM Control Gallery

Available Noetica controls can be activated or deactivated in the CRM **Control Gallery.** Only controls that are activated can be added to the CRM table.

- Open the CRM Control Gallery via the ***More Tools*** option on the CRM toolbar in the Campaign Editor.

The CRM Gallery window displays a list of available controls.



To activate a Noetica control in the CRM:

- Double click on the desired control so that is displayed in **Bold** print and then click OK.
- To remove the control again, double click on it once more.

To enable CTI Auto Search, the available DB properties for the Noetica Telephone control are set to Telephone in the Type column.

To display the customer's name when parking/un-parking a call, the available DB property for the Noetica Name control is set to Name.

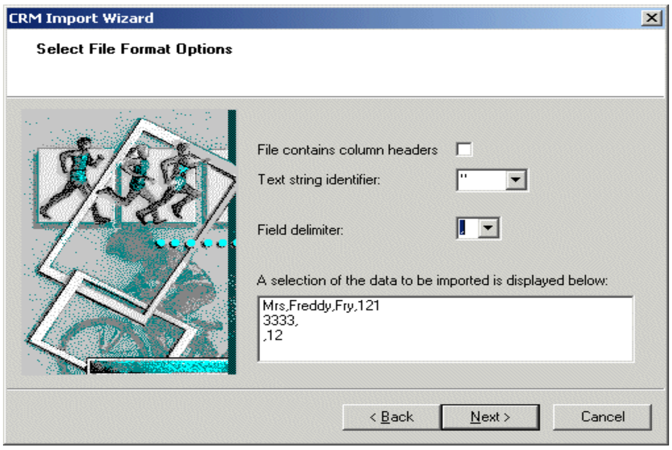
CRM DATA IMPORT WIZARD

The *CRM Import Wizard* provides a step-by-step guide to importing your customer records from a csv file.

Select ***Campaigns*** under the **Setup** heading of the Synthesys main screen and open the campaign that contains the CRM to be used for the import.

- In the *Campaign Editor* click the ***Import CRM***  icon on the **CRM toolbar**.
- Locate and open the file with the relevant customer data via the ***Select file to import customer data*** window.
- Click *Next>* in the introductory screen of the CRM Import Wizard to move to the next window, to select the type of file that you wish to import.

To import a comma- separated file, select the **comma** as the **'Field delimiter'.**

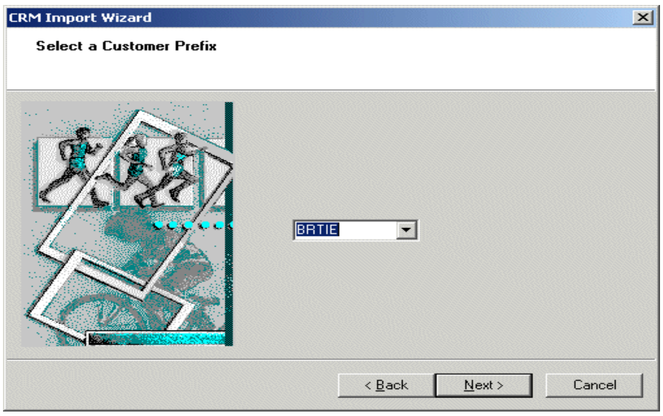


If your file contains column headings, tick the 'File contains column headers' box.

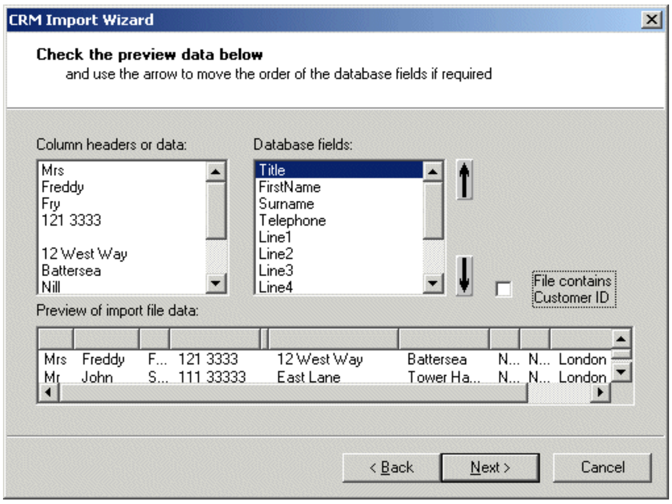
Select the comma to import a comma-separated (.csv) file.

In the next page of the Wizard:

- Select the **CRM prefix** to be used for the import from the drop down menu, then click *Next>* to move to the next page of the Wizard



In the ***Check the preview data*** window of the wizard you can preview your file columns and database fields.



Use the arrow tabs to move the selected database fields up or down to match the data columns in your file with those in the CRM control.

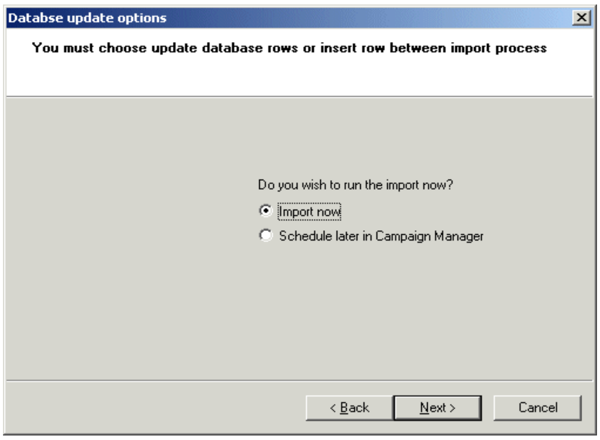
Place a tick into the box, if you are importing customer data containing customer ID's.

In the ***Database Update Option*** window of the *CRM Import Wizard* you can choose to import the customer data immediately or schedule a CRM data import at a later stage in the Campaign Manager.

Importing CRM Data Immediately

To import the customer data immediately:

- Tick the **Import Now** option.



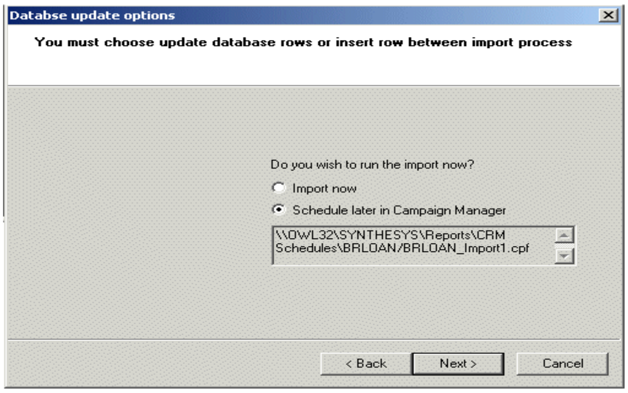
- Click *Next>* to move to the last page of the CRM Import Wizard, which provides a summary of all your selections.
- To import the customer data click ***Finish***.

If you need to make any changes, click <Back until you reach the relevant window.

Scheduling a CRM Data Import

If you wish to run the customer data import at a later stage:

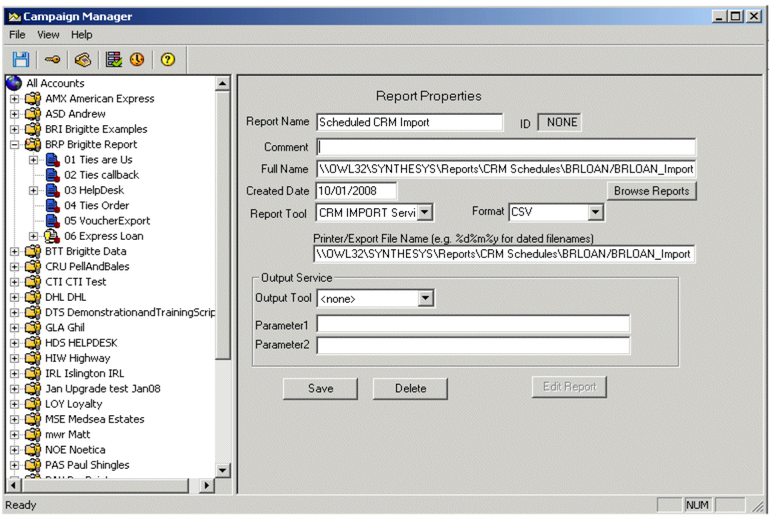
- Select the option **Schedule later in the Campaign Manager** in the Database Update Option window of the CRM Import Wizard.
- Make a note of the file path, as you need this, when scheduling the data import in the Campaign Manager.



- Click *Next>* to move to the last window of the CRM Import Wizard, which provides a summary of all your selections and then click ***Finish***.

Set-up in the Campaign Manager

CRM data imports can be scheduled in the *Campaign Manager*, which is accessed via the ***Reports*** module under the **Setup** heading in the Synthesys main screen.



Select your campaign, click ***Add Report*** and using *Browse Reports*, select the File path for your import.

Copy the file path into the ***Printer/ Export File Name*** field.

- Ensure that the **CRM Import Service** option has been selected as the Report Tool.
- Click **Add Schedule** to set up the frequency for your CRM data Import.

CRM IMPORT LOG FILES

Stages of CRM Fast Import

CRM Fast Import, when importing data with customer ID, has the following stages:

Sorting stage.
At this stage the Import sorts all records in descending order, considering each record as a whole string.
Bulk Copy stage or Initial Load stage
At this stage the Import detects that the table is empty and initially loads all the records. Files without a primary key are handled at this stage as well.
Differentiating stage
At this stage the Import compares all records in the file with records in the table. It skips records that are compared and selects records that are not compared. If a record with a primary key exists it is added into filename.csv.update.txt file. If a record with a primary key is absent it is added to filename.csv.insert.txt file.
Differentiate Bulk Copy stage or Insert stage
At this stage the Import handles filename.csv.insert.txt
Differentiate Update stage or Update stage
At this stage the Import handles filename.csv.update.txt

CRM Fast Import creates the following files:

In our example, we are importing customer data from a csv file called VoucherID. When importing data with customer ID, the following Import files are created:

VoucherID.log
The file VoucherID.log contains summary information of the Import operation result for the VoucherID.csv'file. For example:

Customers Updated: 0,
Customers Inserted: 30,
Customers Ignored: 0,
Customers Failed: 4,
Total Customers: 34,
Log File: C:\Documents and Settings\Brigitte\Desktop\Import\VoucherID.log

VoucherID.csv.sorted.txt
The file VoucherID.csv.sorted.txt contains all records of the 'VoucherID.csv' that you were trying to import.

VoucherID.csv.insert.txt
The file VoucherID.csv.insert.txt contains all new records to be inserted, i.e. data to be added to an existing CRM.

VoucherID.csv.update.txt
The file VoucherID.csv.update.txt contains all existing CRM records that have been updated.

VoucherID.csv.log.txt

The file VoucherID.csv.log.txt contains information about the reason why the failed records of the 'VoucherID.csv'file could not be imported. In our example the data for the CRM field P018 (representing the postcode) was too long.

2005-04-25 11:02:25: ----- Import started -----
2005-04-25 11:02:25: Sorting ...
2005-04-25 11:02:25: Sorted ...
2005-04-25 11:02:25: BulkCoping ...
2005-04-25 11:02:25: Dropping Keys ...
2005-04-25 11:02:25: Dropped Keys ...
Field P018 value (SW12 2 ER) is too long.
See C:\Documents and Settings\Brigitte\Desktop\Import\VoucherID.csv.log.BulkCopy.txt for invalid lines

Field P018 value (BR12 2 ER) is too long.
See C:\Documents and Settings\Brigitte\Desktop\Import\VoucherID.csv.log.BulkCopy.txt for invalid lines

Field P018 value (SW12 2 ER) is too long.
See C:\Documents and Settings\Brigitte\Desktop\Import\VoucherID.csv.log.BulkCopy.txt for invalid lines

Field P018 value (SW12 2 ER) is too long.
See C:\Documents and Settings\Brigitte\Desktop\Import\VoucherID.csv.log.BulkCopy.txt for invalid lines

2005-04-25 11:02:35: BulkCopied ...
2005-04-25 11:02:35: Creating Keys ...
2005-04-25 11:02:35: Created Keys ...
2005-04-25 11:02:35: ----- Import finished successfully -----

VoucherID.csv.log.BulkCopy.txt

The file VoucherID.csv.log.BulkCopy.txt. contains all failed records from the 'VoucherID.csv' that you were trying to import. You can use this file to correct the records as required and then import them again.

VOUCIM_1,Mr,John,Smith,,001 234 4444,Flat 12 ,Kingston Rd,Kingston,London,SW12 2 ER,John.Smith@samsons.com
VOUCIM_20,Mr,Justin,Seals,012 234 1111,001 234 3333,Flat 121 ,Beaver Rd,,Bristol,BR12 2 ER,J.S@samsons.com
VOUCIM_27,Mr,Jeffry,Simons,012 010 4333,222 014 4333,Flat 123 ,Kingston Rd,Kingston,London,SW12 2 ER,JS@samsons.com
VOUCIM_8,Mr,Jason,Smyth,012 234 4333,222 234 4333,Flat 123 ,Kingston Rd,Kingston,London,SW12 2 ER,JS@samsons.com

Differentiate.txt Files

The Differentiate.txt files are created when inserting new records or updating an existing CRM. The examples below are again based on importing customer data from a csv file called ‘VoucherID’.

VoucherID.csv.log.Differentiate.txt

The VoucherID.csv.log.Differentiate.txt file contains records that failed when inserting records or updating an existing CRM, for example because the Customer ID was blank or the number of fields of the record were invalid.

VoucherID.csv.log.DifferentiateUpdate.txt

The file VoucherID.csv.log.DifferentiateUpdate.txt contains all records that failed when updating an existing CRM. You can use this file to correct the records as required and then import them again.

VoucherID.csv.log.DifferentiateBulkCopy.txt

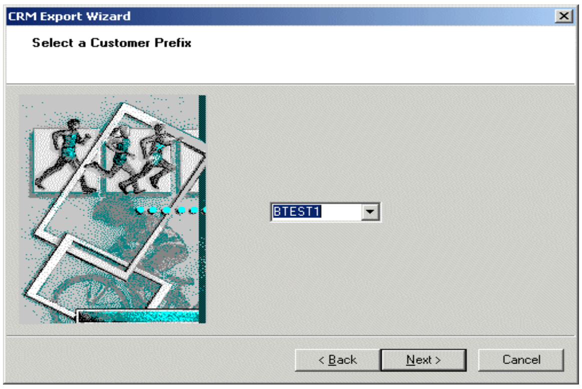
The file ‘VoucherID.csv.log.DifferentiateBulkCopy.txt’ contains all records that failed when inserting new records into an existing CRM. You can use this file to correct the records as required and then import them again.

CRM DATA EXPORT WIZARD

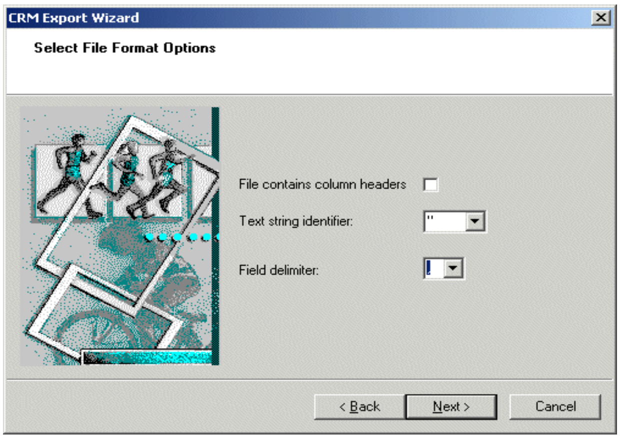
The *CRM Export Wizard*, which is accessed via the ***Campaigns*** module under the **Setup** heading of the Synthesys main screen, provides a step-by-step guide to exporting your customer records to a csv file.

In the *Campaign Editor, s*elect and open the campaign that contains the CRM to be used for the export.

- Click the ***Export CRM***  icon on the **CRM toolbar**.
- In the ***Select file to import customer data*** window select the path and enter the file name for your customer data export.
- Select the **CRM prefix** for the customer data that you wish to export in the *Select a Customer Prefix* window of the wizard.



- Move to the *Next>* page of the *CRM Export Wizard* choose whether or not to include ***column headings*** and to ***select the format*** for exporting the customer data.



The last window of the CRM Export Wizard provides a summary of your selections.

Click ***Finish*** to export the customer data or *Back* if you need to make any changes.

CRM DATA UPDATE, USING THE EXPORT WIZARD

The ***Synthesys Export Wizard*** allows data from a Synthesys call to be formatted as necessary and exported to an external data source, for example, a database table or as a comma separated file.

The Synthesys Export Wizard can also be used to update a CRM, with data collected during a call. The wizard generates a file, which is then used to reproduce the export as many times as required in much the same way as reports are generated.

The ***Synthesys Export Wizard*** is available from the *Campaign Manager, which is* opened by clicking on ***Reports*** under the **Setup** heading of the Synthesys main screen.

Setting up a CRM Update

To update CRM data using the *Synthesys Export Wizard* the following steps are required:

- In the *Campaign Editor* **add** the required **fields to** your **CRM**, so that the information can be entered and updated when the Export is run.
- Before creating the Export, make a note of your CRM Prefix and the CRM section name.
- In SQL- Phoenix, check the CRM column names and associated codes of the fields that you wish to update (i.e. Log Number = P017).
- In the ***Reports*** module under the **Setup** heading of the Synthesys main screen set your export using the ***Export Wizard*** in the Campaign Manager.

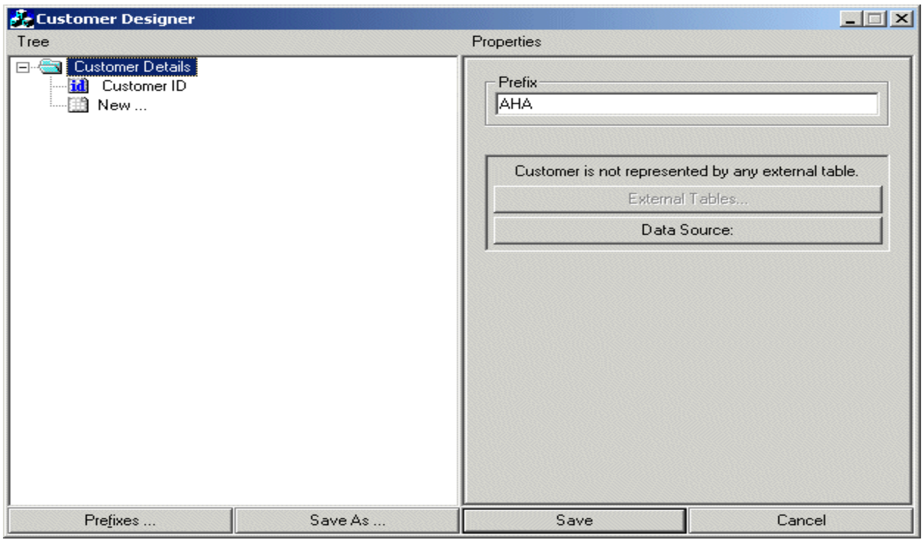
For more detailed information about creating Exports, please refer to the notes on the Export Wizard in the Creating & Managing Reports section.

CRM & EXTERNAL DATABASE LINK

The CRM can be linked to external database tables using the **Data Source option** in the **right-hand window of the Customer Designer**.

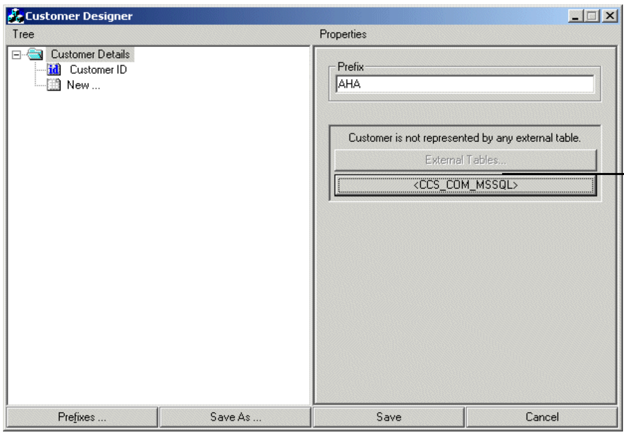
To use the External Data Source option, a DSN name needs to be set up on the server and Noetica will need to add an entry to the CCS_Interfaces table, with the Interface Alias being unique.

The CRM has ‘read only’ access to the external tables and therefore records cannot be modified, added or deleted from the mapped customer.



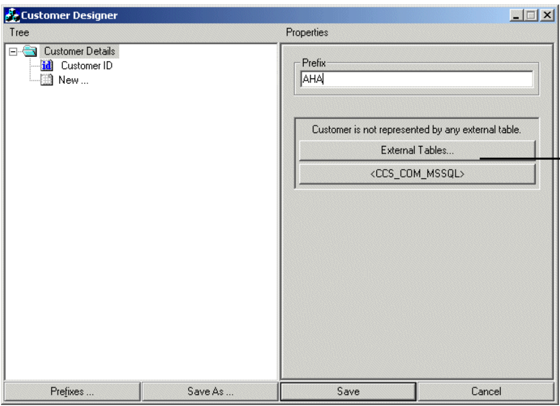
Selecting External Data Sources

- Click the **Data Source** button to display the available DB source or a list of available DB sources if more than one external source exists.



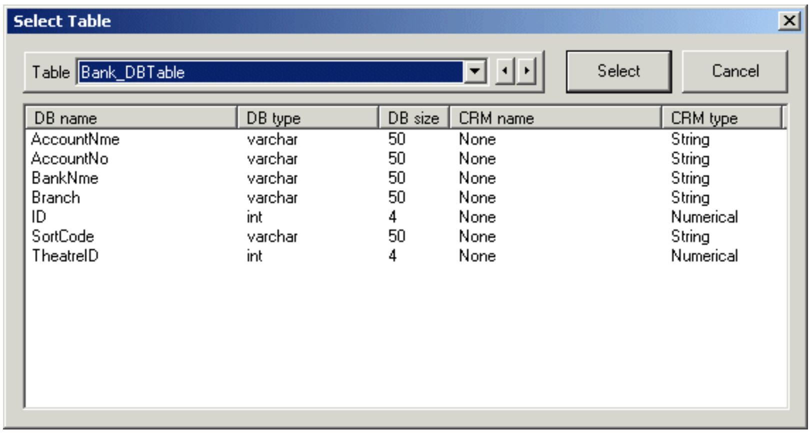
Data Source

On selecting the required DB source, the **External Tables** button will be enabled.



External Tables

- Click the **External Tables** button to open the *Select Table* dialog.
- Locate the desired table from the drop down list and click **Select**.



Select the desired table from the list of all available tables

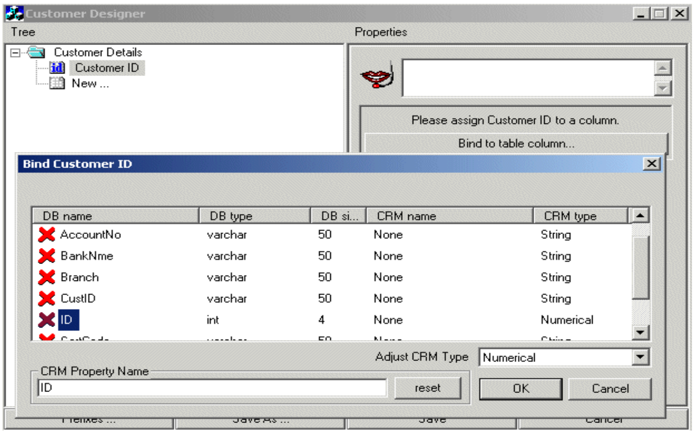
The selected table now represents your ***Main Customer*** table.

Binding Customer ID to External Table Column

To start up the **Bind Customer ID** dialog:

- Select **Customer ID** in the CRM Design table and click the **Bind to table column** button on the right hand side.

- In the *Bind Customer ID* window, select the column to be handled as Customer ID.



In our example, we have linked Customer ID to the 'ID' column in our DB table.

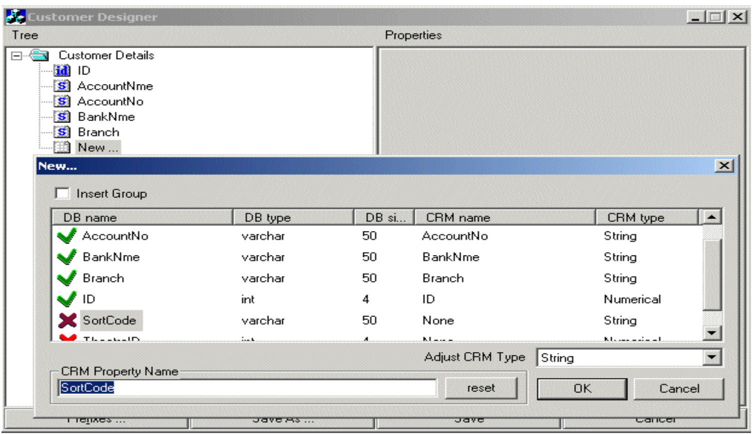
Adding Properties

- To add a table property to your CRM double click **New..** in the Tree of the Customer Designer.

- From the table displayed, select the required column ('DB name' column) and click OK or simply double click on the property name.

- Use the ***CRM Property Name*** field to define a different name for the column in the CRM tree.

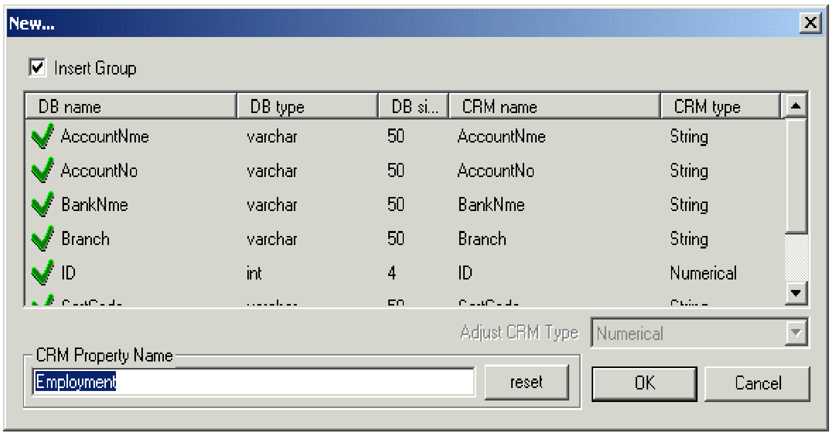
- ***Adjust the CRM Type*** as required, i.e. select 'Telephone' for a telephone number



Adding a Group

To add a group table:

- Double click **New..** in the CRM Design Table.
- Tick **Insert Group** in the window now displayed, enter a CRM Property name and click OK.

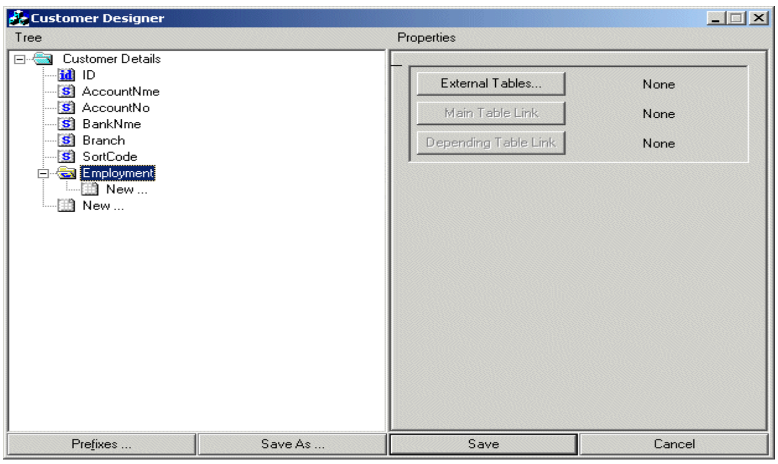


Selecting External Data Sources for a Group

On selecting the group item you will see three buttons in the properties window on the right: **External Tables, Main Table Link** and **Depending Table Link.**

- Click the **External Tables** button on the right hand side to open the **Select Table** Dialog and select the desired table.

Tables already used will no longer appear in the list.



Binding a Group

The Main Customer table or subsequent parent group table now need to be linked to the newly added tables.

- Click **Main Table Link** to select a binding column in the Main Customer table
- Click **Depending Table Link** to select a binding column in the newly added table.

*Before releasing your CRM table, check that you have created a link for the **Customer ID**, the Main Table and subsequent Group tables.*

Settings & Customisation

Having created and released your CRM table:

- Go to Properties of the CRM.
- In **Settings** select your CRM prefix, if not displayed automatically and tick the **Tab headings** that should be displayed in 'Take Calls'.
- Use the ***Search, Insert, Modify and Result*** buttons respectively and tick the fields in the CRM table that you wish to display to the agent in 'Take Calls'.

*The **New** and **Modify** buttons are disabled, as the CRM has **read only** access to the external tables.*

Records cannot be modified, added or deleted from the mapped customer.

CRM MAINTENANCE

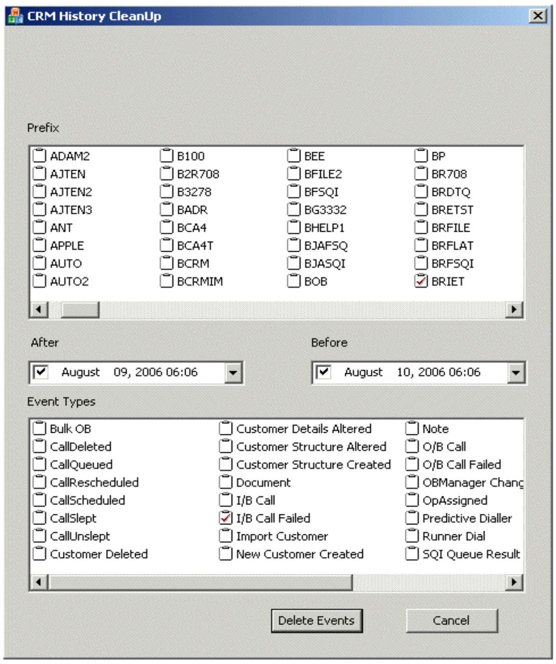
Selected CRM history events and unused CRM prefixes can be deleted in the *Campaign Editor*, which is opened selecting ***Campaigns*** under the **Setup** heading of the Synthesys main screen.

CRM History Cleanup

To clean up CRM history events open a campaign and in the *Campaign Editor*:

- Expand the ***More Tools*** option of the ***CRM toolbar***.
- Click the ***History Cleanup*** icon.

In the *CRM History Cleanup* dialog select the ***CRM prefixes***, the ***date range*** and the ***specific history events*** that you wish to delete.



Prefix	In the *CRM History Cleanup* dialog tick the CRM prefixes for the history events to be deleted.
After / Before	Select the date range (After – Before) for the history events to be deleted.
Event Types	Tick each event that you want to delete from the history of the selected CRM prefixes.

Clicking the **Delete Events** button will delete the selected history events. Clicking *Cancel* will close the *CRM History Cleanup* dialog without deleting history events.

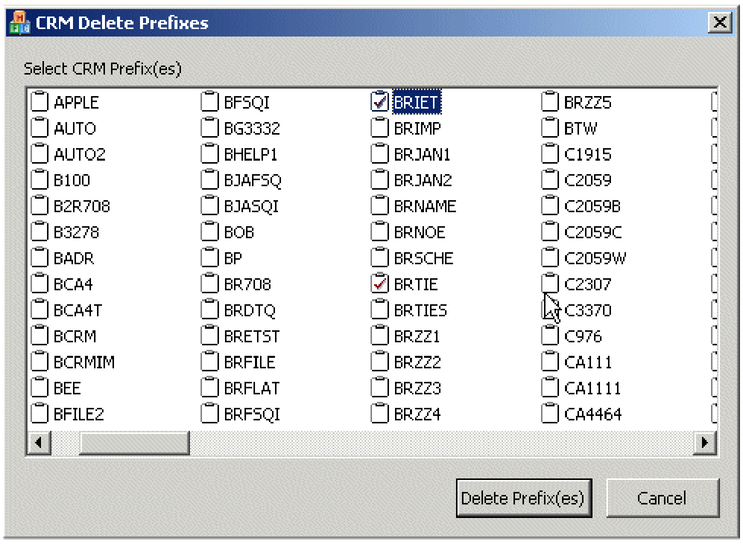
CRM Delete Prefix

To delete CRM prefixes:

- Expand the **More Tools**  option of the **CRM toolbar** in the *Campaign Editor*.

- Click the **Delete Prefixes**  icon.

In the ***CRM Delete Prefix*** dialog place a tick into any of the check boxes next to the CRM prefixes that you wish to delete.



- Click the **Delete Prefix(es)** button, to delete the selected CRM prefixes.

- Click **Cancel**, to close the *CRM Delete Prefixes* dialog, without deleting the selected CRM prefixes.

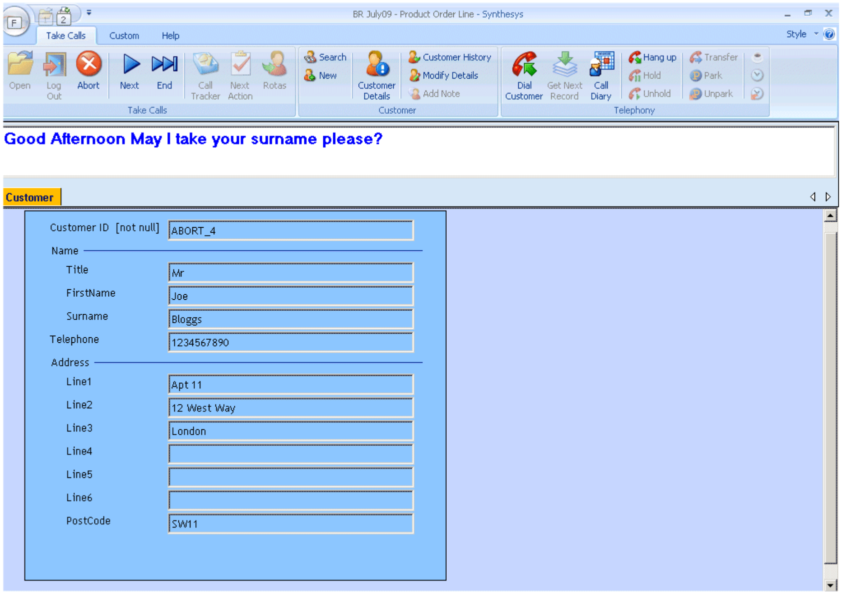
CRM prefixes that are still used in a campaign can't be deleted.

A message will be displayed informing you that the CRM must be removed from the campaign first, before you can delete the prefix.

TAKING A TEST CALLS ON THE CRM

Use the TestCallflow  icon to run a test call in the Campaign editor.

The CRM will be displayed together with the appropriate Agent dialogue. The exact appearance of the control will depend on how the CRM has been configured.



Any of the options below that have been ticked in the CRM Properties page can be accessed via the corresponding icons:

Option	Used To
	**Search**. Enables the search for existing customer details.
	**New**. Add a new customer.
	**Modify**. Allows the modification of existing customer details.
	**Details**. Display customer details.
	**Notes**. Display and add information related to the customer.
	**History.** Access information of a customer's previous contact with the company and attach notes and documents associated with the selected customer

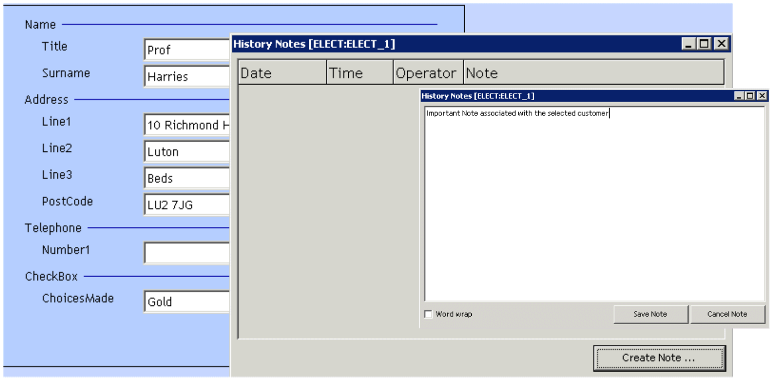
Please see next page for more information about attaching notes and documents.

Attaching Notes to a CRM Record

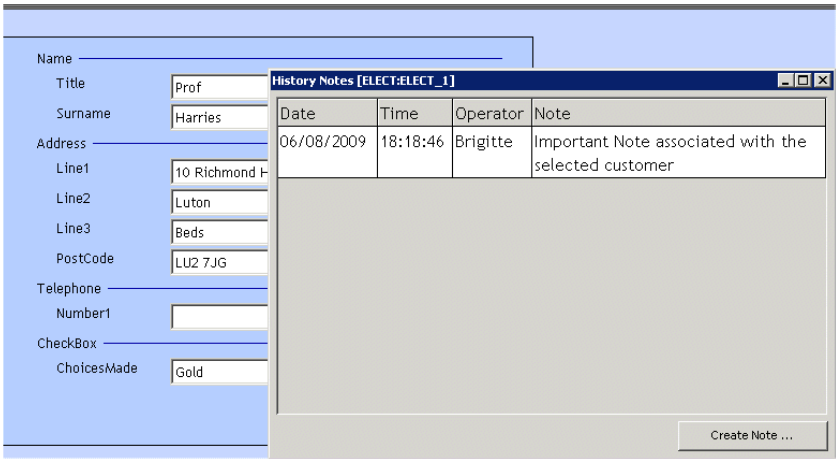
In some cases callflow designers may wish to attach notes or documents to a selected customer's CRM history, which than can be accessed and edited by agents when running a live call.

- To attach a note, click the **Notes**  icon on the Customer toolbar in the agent view.

- In the *History Notes* dialog subsequently displayed click on ***Create Note,*** to enable the text box.



- Add the note associated with the selected customer into the text box and then click the ***Save Note*** button to display the note.



*If **auto pop notes** are enabled, the CRM notes page will open automatically together with the CRM customer record, when running a live call.*

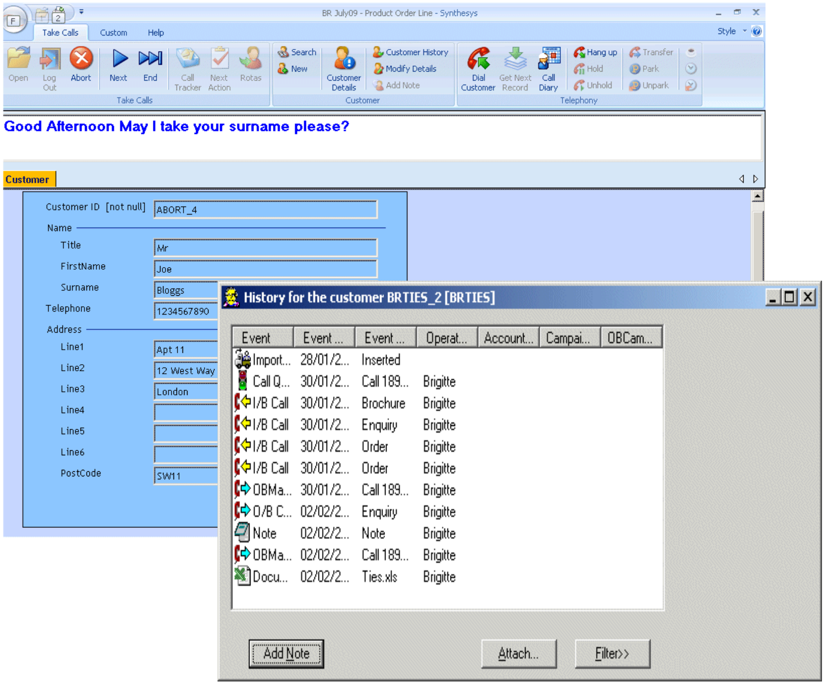
To open a note manually, click on the CRM Notes icon on the Customer toolbar.

Attaching a Document to a CRM Record

To attach a **documen**t, click on the **History**  icon and then the **'Attach..'** tab.

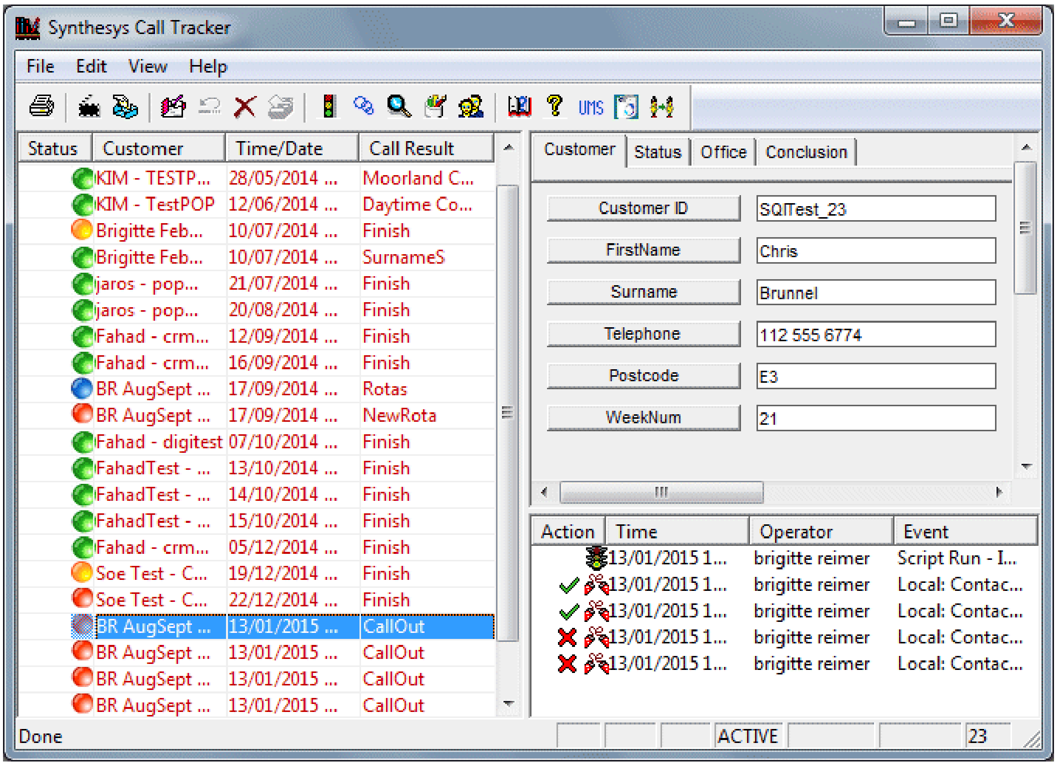
In the **Open File dialogue,** you can browse for the document to attach to the customer's record.

The document that you wish to attach has to be accessible on a ***Network Shared Directory****.*



To read a note or to view the content of an attached document in the CRM **History window**, select and double **click** on the associated **'note' or 'document' icon**.

THE CALL TRACKER
Synthesys Workflow



THE CALL TRACKER (Synthesys Workflow)

Introduction

The essence of call tracking is to allow existing data on the database to be retrieved, viewed and amended if and when necessary. Once a call has been taken in the *Agent Workstation*, what happens to it next depends on the type of call.

Some calls that are handled may just need reports produced about them, whereas other calls may require further action to be taken. Such actions may include contacting an engineer to go out on a site visit, or requesting a Help Desk Specialist to take over the call to solve an outstanding support problem.

The *Call Tracker* is used to follow up and monitor calls that have been taken. Viewing the details of outstanding calls, call centre supervisors can allocate appropriate staff to deal with the problems reported, for example sending out technical specialists.

Call Tracker and On-site Service Calls

The *Call Tracker* facilitates the handling of a sequence of actions that are required to complete and clear a call. For example, a customer may place a call for an engineer to come out on site. Before this call can be cleared, a series of actions must take place, such as:

- Page the engineer.
- Pass call details to the engineer.
- Wait for the engineer to confirm that the call has been cleared.

The *Call Tracker* provides you with intelligent advice regarding the next appropriate action(s) to handle each situation effectively. Each stage in the sequence of events is under the control of *Synthesys*, prompting you at the appropriate time with the next course of action and a choice of alternatives.

At all times you take the final decision as to whether to accept the preferred option, or choose one of the alternatives. For example, if the engineer is paged, but does not respond within a predefined time, *Synthesys* will advise you of the next course of action. This may be to simply page the engineer again, or to escalate the call to the engineer's manager.

Call Tracker and Outstanding Help Desk Calls

The *Call Tracker* provides an instant view of all active calls and therefore aids the deployment of specialist staff to resolve outstanding issues.

If, after working through a callflow, you are unable to resolve the caller's problem, the call remains active on the system. This outstanding call can be viewed and retrieved by a specialist, who can view the history of any actions taken and rerun the original callflow to view the answers that were provided by the caller.

Every action is logged on the system and is stored against the call record. This call history can be viewed at any time allowing anyone to be able to progress the call effectively. For example, should a customer telephone to see if an engineer is being sent out on site, you could access the call details, view the call history and offer an appropriate response.

TACT and Synthesys Workflow

The *Teams Augmented Call Tracker* provides the functionality of filtering active calls according to teams. Agents thus will only handle calls from campaigns assigned to their team.

TACT is also the start to a workflow system as calls can be moved between teams using the 'Pass to Team' action. An agent taking an Inbound call can pass the callflow containing all call details to the sales team, who can pass it to the accounts department who in turn pass it on, to be dispatched.

Unified Messaging Service (UMS)

The Unified Messaging Service (UMS) allows agents to automatically send a message to several customers by various methods, for example via pager, fax, SMS and e-mail.

The UMS can be set up as part of the Callflow, in which case the messages will be send to customers listed in an address book on completion of taking a call or alternatively UMS can be used in the Call Tracker, sending messages to customers using the address book or sending Instant Messages to persons not included in the address book.

To set up the UMS, we use two ActiveX controls, one control contains the message text box and the other maintains the UMS address books. Additional services in the Synthesys Control Programme facilitate each required method of messaging.

Noetica

QUICK REFERENCE GUIDE

A call can be in any one of five states: Active, Inactive, Archive, Testing or Discarded.

Active: Calls that require action in the Call Tracker before the call can be cleared.

Inactive: Calls that have been completed (i.e. all relevant actions have been finalised). They are no longer active, yet the call has not been archived.

Archived: Calls that have been taken and need no further actions.

Testing: Calls that have been completed as test calls.

Discarded: Calls that are marked as discarded (deleted) in the database.

Call tracking allows existing data on the database to be retrieved, viewed and amended if and when necessary. The *Call Tracker* can be used by Agents to follow up and monitor calls that have been taken.

Calls taken on Synthesys fall into two categories: ‘Finalized’ calls (i.e. Archived calls) just need reports processed about them and ‘Follow-up’ calls (i.e. Active calls), which require the agent to take further actions, for example, paging an engineer or contacting a doctor in an emergency.

Synthesys uses the theatre metaphor for the Call Tracker.

Rota: Company employee work roster.

Actor: The different individual employee’s within a firm/company.

Role: The positions of employment held by certain individuals within a company. Every actor must be assigned a role.

Theatre: A branch/area office. A Company may have several of Theatres, for example different area offices, all of which need to be incorporated into the follow-up Callflow. Every branch will have different rotas, actors and roles.

Theatres can only be used in conjunction with either the DB Table control or the Theatre Allocation control.

SETTING UP FOLLOW-UP PROCEDURES

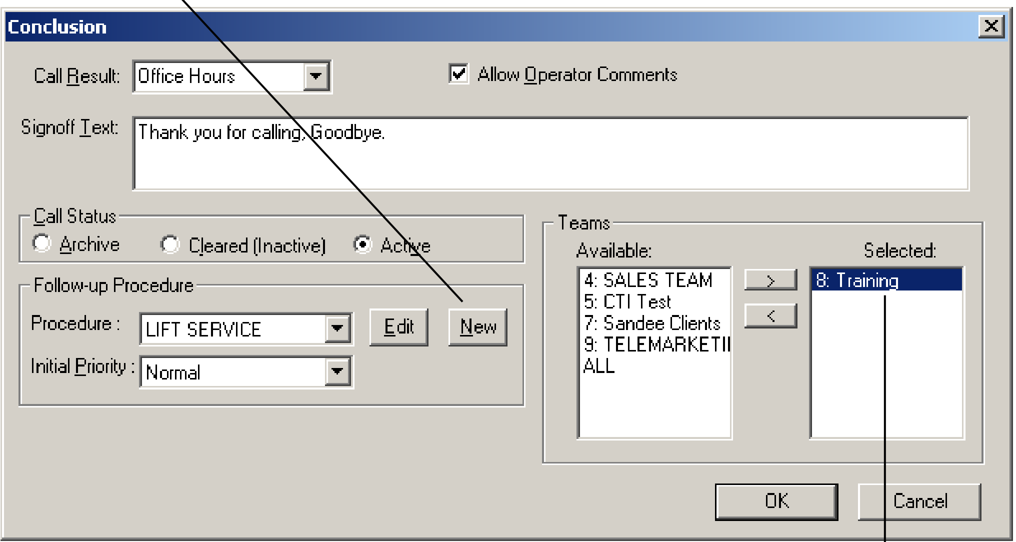
This section will guide you through the process of setting up a ***Follow-up Callflow*** and creating escalation procedures, adding employees, their position in the company, contact numbers and work rosters.

To set up the Follow-up Procedure:

- Go to ***Campaigns*** under the **Setup** heading of the Synthesys main screen and open the callflow to be used for the escalation procedure.
- Double-click the chequered flag ***Finish*** to open the *Conclusion* window.
- Change the default ***Call Status*** from Archive to ***Active*** to activate the Follow-up Procedure dialog.
- Click the ***New*** button and enter a descriptive name in the dialog displayed.

Click ***New*** and enter a name for the Follow-up Procedure in the window displayed.

Select the relevant team(s) if you wish the calls to be handled by specific agents only.

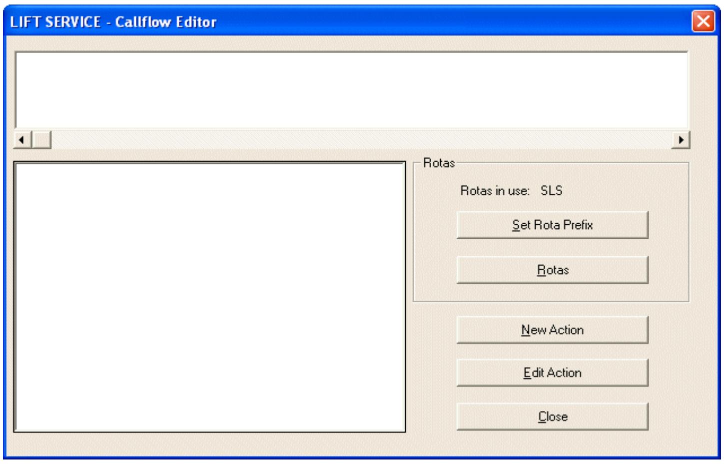


The Teams and the agents belonging to a team need to be set up in the Synthesys **Teams** module.

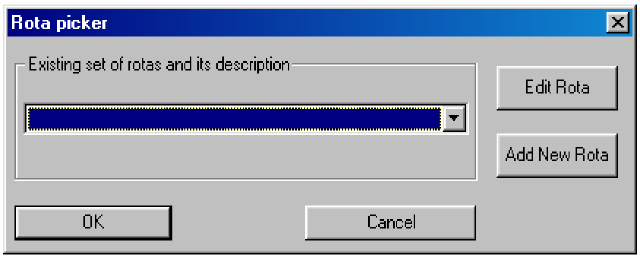
Next you need to create ***Rota Tables***, so that you can set up the work roster for the employees of the Lift Repair Service.

Creating or Selecting Rota Tables

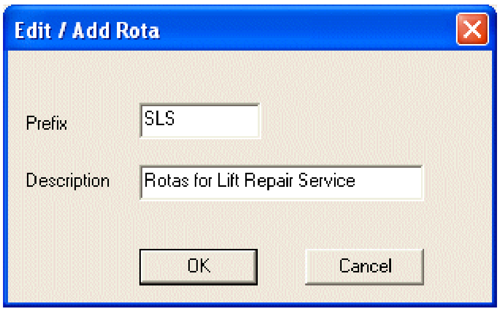
The window now displayed shows the name that was entered for the follow-up procedure, in our example *LIFT SERVICE* - Callflow Editor.



- Click the ***Set Rota Prefix*** button to display the Rota Picker window.
- The drop down menu contains a list of existing Rota prefixes.
- To add a new rota prefix, click the ***Add New Rota*** button.



- Into the *Edit/ Add Rota* dialog, enter a Rota prefix/ name containing up to 5 characters, beginning with a letter.
- Add a brief description, i.e. the name of the account for the Rota details.

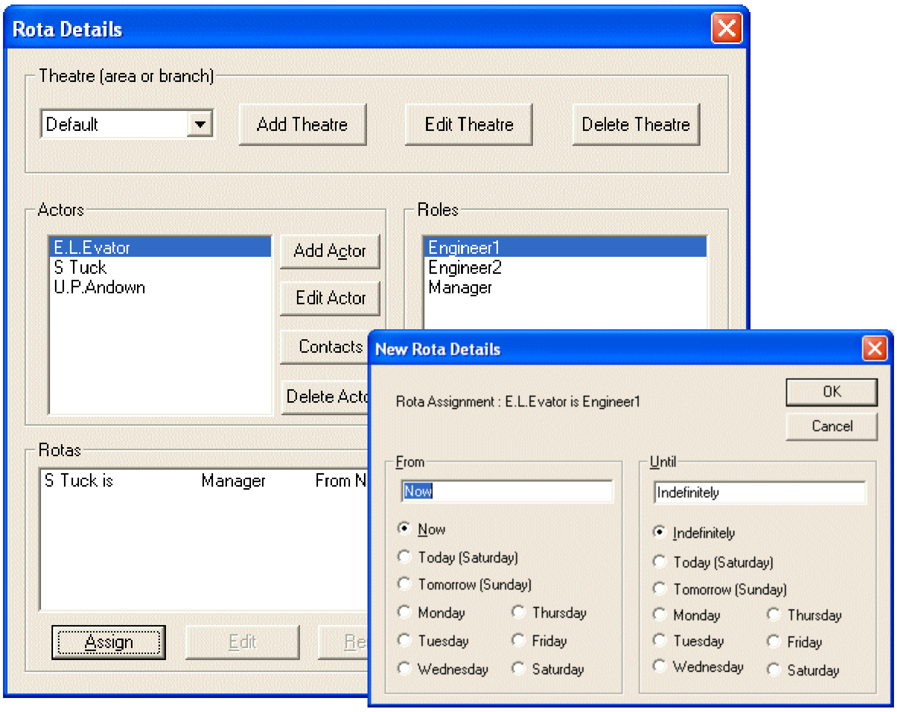


Click OK to return to the *Rota Picker* window. Wait for your details to appear and click OK to return to the *LIFT SERVICE* follow up window to enter contact details.

Entering Contact Details

In the *LIFT SERVICE* follow up window, click the ***Rotas*** button to open the *Rota Details* window.

- Click the ***Add Actor*** button, to add the names of the employees, leaving the *Contact* field blank.
- Next, select ***Add Role*** to add the employee's position in the company, for example Engineer1, Engineer2 and Manager and click OK.



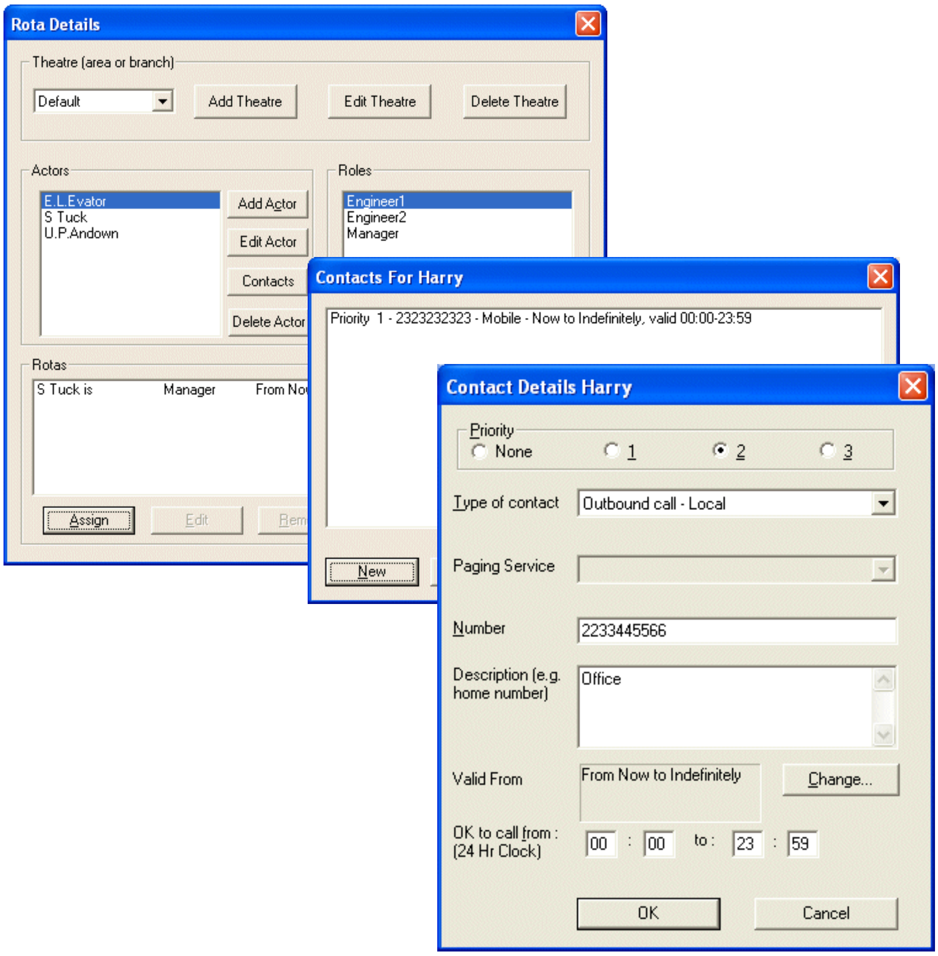
Now assign each employee/ actor a role and work rosters:

- Select an employee**,** i.e. S.Tuck from the **Actor** section and a role, i.e. ***Manager*** from the ***Role*** section.
- Click the ***Assign*** button now activated to open the *New Rota Details* window.
- Assign the rota from ***From Now to Indefinitely*** and click OK.
- The information ***S. Tuck is Manager From Now to Indefinitely*** has been entered in the *Rotas* section.
- Assign the other two employees the role of *Engineer1* and *Engineer2,* also from 'Now to Indefinitely.

Next, allocate the contact numbers for the individual actors.

Firstly, we assign the contact numbers for the manager:

- Select the manager S.Tuck in the **Actors** section.
- Click the ***Contacts*** button to open the *Contacts For* dialogue and ***New*** to open the ***Contact Details*** window.



- Select Priority 1 and from the Type of contact pull down list select outbound call – Mobile.
- Enter a telephone number for the manager S Tuck into the *Number* field
- Enter a description for the number, i.e. Mobile into the *Description* box and click OK to return to the *Contacts For* dialogue box.
- Click the ***New*** button again to add a ***second telephone*** number for the Manager S Tuck, this time selecting ***Priority 2*** and click OK.

Next, repeat the above steps to add the numbers for the engineers, their first contact being the mobile, the second t a local call to the office, as specified on the next page.

Close the *Rota Details* window when all numbers have been added.

Setting up Escalation Procedures

We now have to set up the Follow-up procedures as requested. If there is no response to the first specified action, the priority of the call must increase and further actions are to be added:

1. Phone the mobile number of the duty engineer
2. Wait for 10 minutes
3. Try the duty engineer on the office number
4. Raise the priority to 'Priority'
5. Repeat the above steps for engineer2
6. Raise the priority to 'Urgent'
7. Contact Mr Tuck, the Manager

The sequence of these contacts is defined by the client and can vary week by week, as the rotas of employee's change.

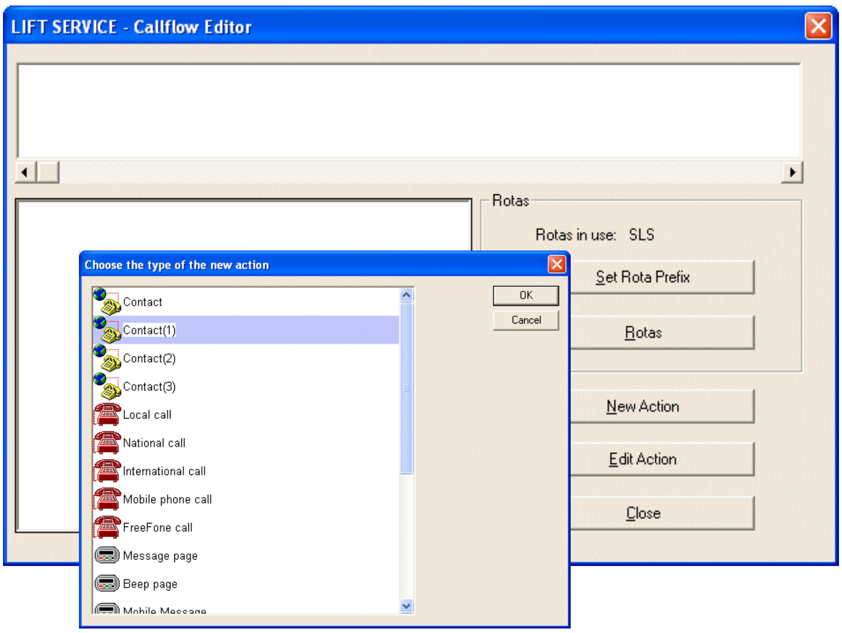
To assign the call out procedure, use the **Contact(1), Contact(2)** and **Contact(3)** options to enable the *Call Tracker* to determine the actor contact to use depending upon priority and time band**.**

Escalation Procedures: Engineer1

Select ***New Action*** at the Follow-up *Callflow Editor* Window.

- In the Choose the Type of New Action window select 

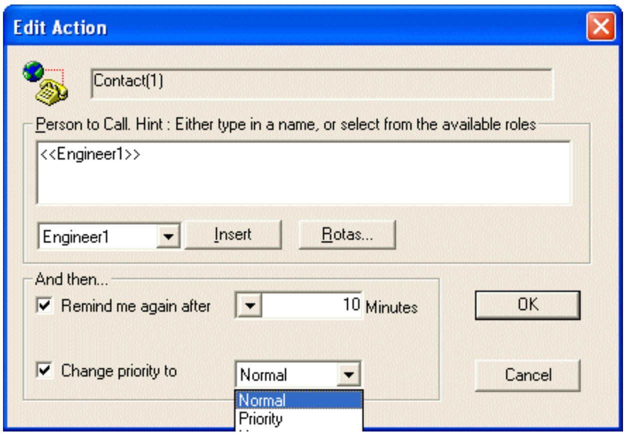
from the list and click OK.



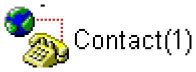
The Edit Action window opens.

- Select ***Engineer1*** from the drop down menu and click the ***Insert*** button to move <<Engineer1>> in the *Person to call* section

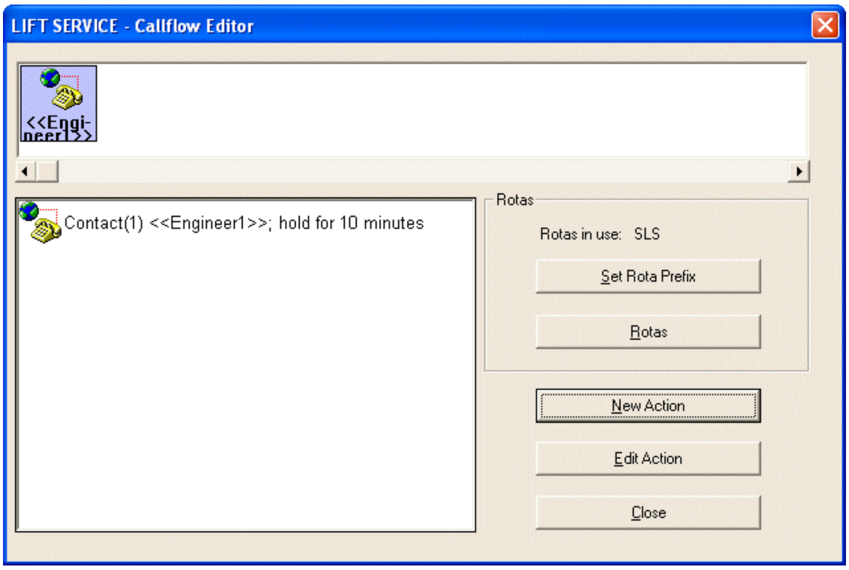
- Tick ***Remind me again after*** and select ***10 minutes*** from the drop down menu and click OK. Ignore the ‘Change priority’ check box for now



- In the Follow-up Callflow Editor window *Contact (1) Engineer1>>, hold for 10 minutes* appears.

- Select  <**Engineer1**>>’ and drag and drop the action into the top section of the window.

The Call Tracker now knows that you wish to contact Engineer1 on his first contact number and the information has been added to the callflow.



Next you want assign the second contact number for the first engineer.

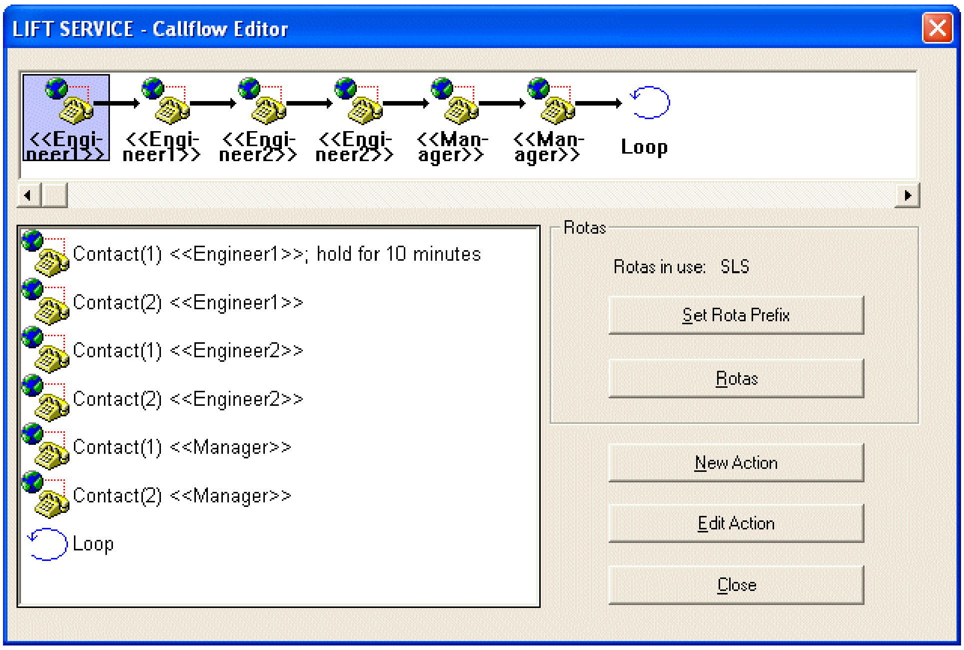
To assign the first engineers second contact number

- Click **New Action** and select Contact(2)
- In the Edit Action dialogue box, select ‘**Engineer1**‘ again, ***Insert*** and OK.
- Tick ***Change Priority*** to and select ***Priority*** from the drop down menu.
- In the Follow-up callflow design window drag ***Contact (2) <<Engineer1>>*** into the top section of the window to put the information about contacting Engineer1 and his second number into the callflow.

Escalation Procedures: Engineer2 & Manager

Set up the contact procedures for Engineer2, selecting Contact(1) - Engineer2 and Contact(2) - Engineer2, and then for the Manager, changing the priority from ‘Priority’ to ‘Urgent’, as required.

Drag the contact actions into the top section of *the* window and add a ‘ ‘ loop action at the end of your follow-up callflow. This will automatically repeat all stages of the call out, starting again with ‘Contact (1) – Engineer1…’



When all the desired actions have been set up, close the Callflow Design window and click OK in the *Conclusion* window.

The chequered flag ***Finish*** has turned from black to red to signify that this is a Follow-up callflow. Save and publish the callflow before taking a call in the Agent view.

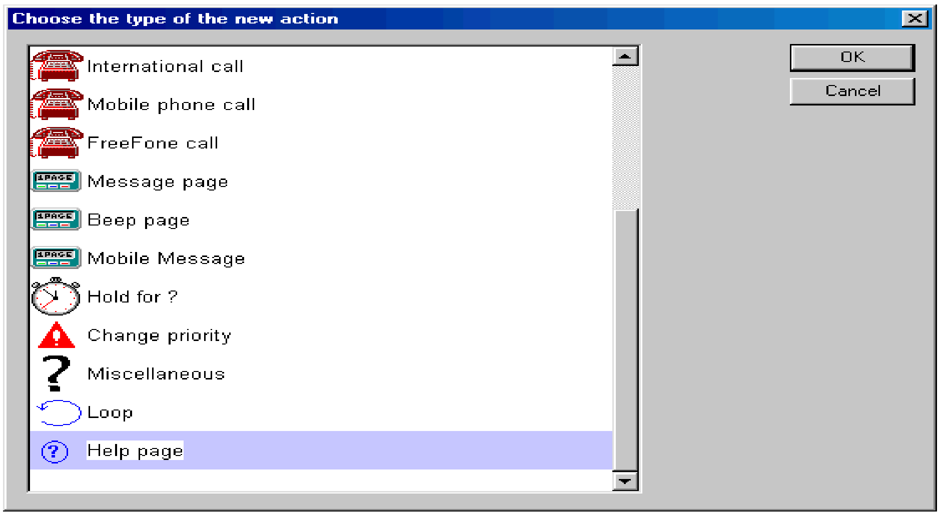
Help Pages in Escalation Procedures

Help Pages can be specifically designed and added as an action at strategic points within the follow-up procedures, allowing the Agent easy access to any relevant information whenever required.

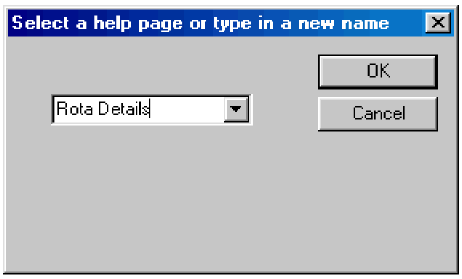
- To design your Help Page(s) select ***New Action*** in the *Follow-up Callflow Design* window.

- In the *Choose the Type of New Action* window select 

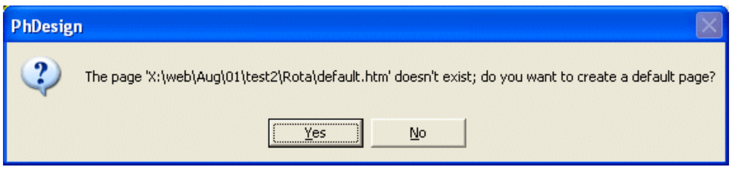
and click OK.



- Enter a name for the new Help Page in the window displayed or select an existing Help Page from the drop down menu, then click OK.



In the *PhDesign* window click ***Yes*** to confirm that you wish to set up a default page.

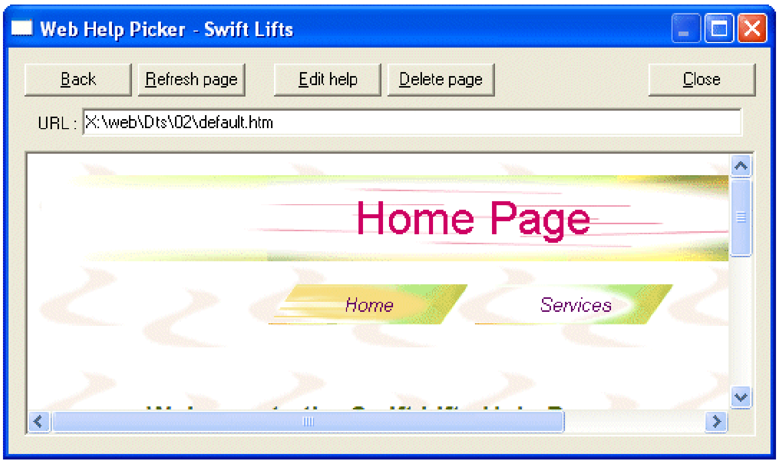


The Web Help Picker window will open.

-

- Click ***Edit Help*** to open your HTML editor, create and save your Help Page.

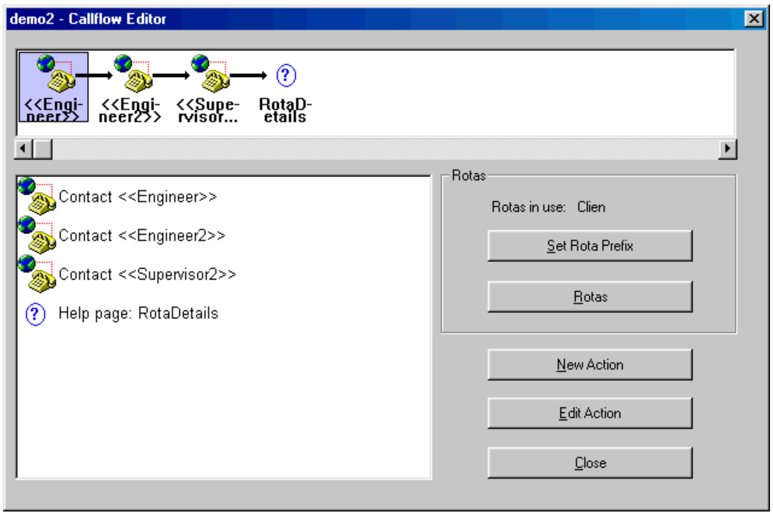
- Exit your Help Page Editor and remember to click Refresh page to update your Help Page.



- Click CLOSE to return to your Follow-up Editor screen.

The Help Page icon together with the name of your Help Page, in our example 'Rota Details', will be displayed.

Select the image of the Help Page and drag and drop it into the top section of the window as part of the escalation procedure.



If you wish to edit your Help Page right click on the Help Page image and click ***Edit***.

Save and publish your callflow before taking a call in the Agent view.

Pass to Team Action

The *Teams Augmented Call Tracker (TACT*) allows the filtering of active calls according to teams so that Agents will only handle calls from campaigns assigned to their team.

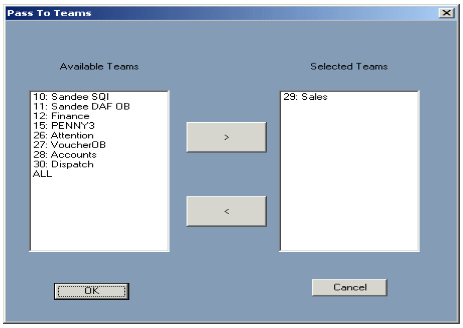
TACT is also the start to a workflow system as calls can be moved between teams using the ‘Pass to Team’ action. A Callflow containing all call details can thus be passed on to another department, i.e. Sales or Accounts, for processing.

To add the ***Pass to Team*** action:

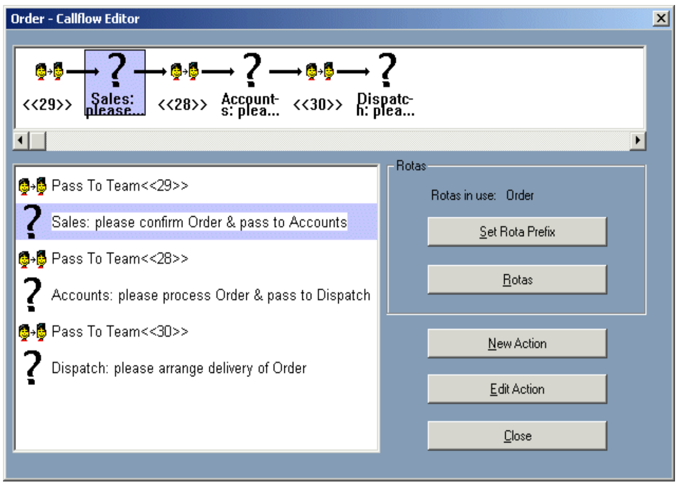
- Select ***New Action*** at the Follow-up *Callflow Design* Window.
- In the ***Type of Action*** window, select the 

action and click OK.

The *Pass to Teams* window is now displayed, containing all the teams that have been created in the Synthesys Team Manager.



- Select the required team and click OK. In our example we have selected the ‘Sales’ Team: <<29>>.
- To add the action to your Follow-up callflow, drag the ‘Pass to Team<<29>>’action into the top section of the Follow-up window.



Use the 

action for brief instructions to the respective departments, i.e. Sales: ‘Please confirm Order & pass to Accounts’

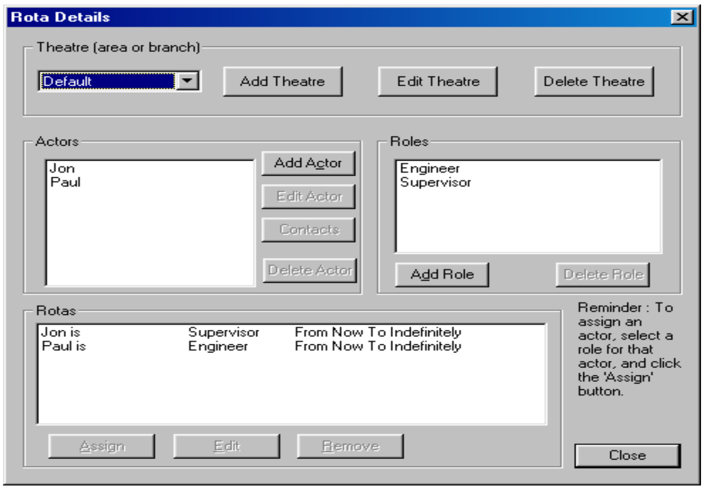
Adding, Editing and Deleting Theatres

A Company may have a number of different area offices with different sets of engineers but using the same call out procedures for all areas.

If the roles and follow-up procedures are different, you need to use separate conclusion flags in the callflow, with associated follow-up procedures.

To create a link to the respective Theatres (area offices) use the DB table or Theatre Allocation control to the callflow.

In the ***Rota Details*** window you can add details of area offices clicking the *Add Theatre* button and edit or delete an existing Theatre using the *Edit Theatre* or *Delete Theatre* options.

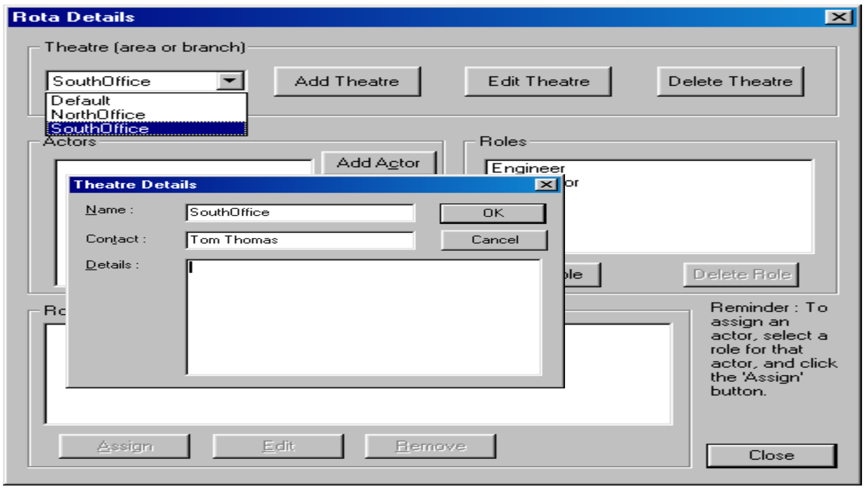


- To add details of area offices, click the ***Add Theatre*** button.
- To edit a Theatre, select the Theatre from the drop down menu and click ***Edit Theatre***
- To delete a Theatre, select the Theatre, remove the actors from the *Rota* window and then click **Delete Theatre**

Before you can delete a Theatre, you must remove the actors from the Rota window first.

To add details for a new area office:

- Click ***Add Theatre***, to open the *Theatre details* window.
- Enter the required information, i.e. name of the area office and manager and other relevant details.
- Click OK to confirm the entry.



- Back in the Rota Details window select the required Theatre (office) from the drop down menu.
- Add the names and contact details of the actors for the selected area office and assign the actors a role and roster.

You can now use the existing escalation procedures, or set up new procedures.

Remember however that you can only use Theatres, if the call out procedures for the Default Theatre and all subsequent Theatres / area offices are the same

If the there are different call out procedures for each of area offices, you need to use separate conclusion flags in the callflow, each with the associated follow-up procedures.

ROTA IMPORT

The *Rota Import* facility allows the import of rota information using comma separated (.csv) or Excel (.xls) files. The Rota import programme will load the input file and put the associated data in the Rota tables for the specified Prefix.

To utilize the *Rota Import* facility, you must create the columns and field types as outlined in the section **Rota Import Specifications**.

If the rota prefix that you import already exists, information of the existing rota table will be updated, with the exception of the **Role, Start, End** table. Role assignment records will always be added, never updated and any existing role assignments for this actor will still be valid.

Please see next page for more information.

Points to consider

Please see the **Rota Import Specifications** section for detailed information regarding the columns and field types used for the rota import.

Please also consider the following points, when checking the data file that you are about to import:

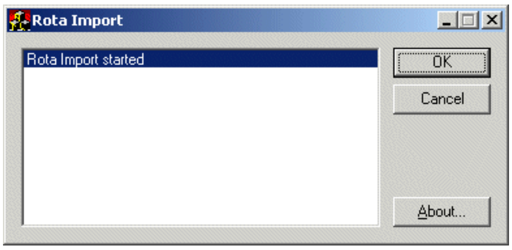
Rota Import using Excel	To import rotas using xls files, Excel needs to be installed on the workstation from which you run the rota import.
Length of Rota Prefixes	Rota Prefixes must not be longer than 5 characters and the Prefix must start with a letter, rather than a number, or the rota import will fail.
Using the Default Theatre	If you wish to use the Default Theatre, either enter the word 'Default' in the Theatre column or leave the Theatre column blank. (If the Theatre column is blank/empty, the Default Theatre will be assigned automatically, unless you cancel the rota import).
Type of Contact	The available options for the type of contact need to be entered in the format specified (i.e. Outbound – Local) otherwise the record will not be imported.
Date Time Format	Dates and time must be entered as the date/time format: yyyy-mm-dd hh:mm:ss (2003-12-31 23:59:59).
Out of Time contacts	To display 'Out of Time' contacts for the various numbers entered for *Contact 1-3*, you must enter the start and end date / time (yyyy-mm-dd hh:mm:ss) into the respective 'Start' and 'End' columns. If the contact numbers are available from 'Now' to 'Indefinitely', the 'Start' and 'End' columns can remain blank.
Date/Time for Roles (Engineer/Manager etc)	The 'Start Date/time' and 'End Date/time' fields, specifying when an actor (Engineer/Manager etc) is on duty, should always contain a date/time format: yyyy-mm-dd hh:mm:ss. If the fields are left blank, the actors will be assigned as being on duty from 'Now' to 'Indefinitely'.

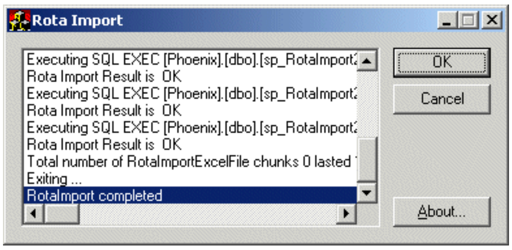
Importing Rotas

The facility to import rota information from csv or xls files is accessed via ***Campaigns*** under the **Setup** heading of the Synthesys Main Screen:

- Open the callflow to be used for the rota import and in the *Campaign editor* go to ***Maintenance*** on the ***Tools toolbar***.
- Select **Import Rotas** from the drop down menu**.**
- Locate the **file** that contains the rota information that you wish to import. The file can be a comma separated (**.csv**) or Excel **(.xls**) file.

The *Rota Import* window will open, indicating the start of the rota import.



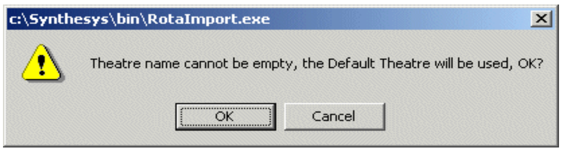


- Click OK when the message **Rota Import completed** is displayed.

Blank Theatre Names

If the Theatre name column is blank/ empty, a message will be displayed informing you that the Default Theatre will be assigned automatically.

Click **OK** to use the *Default Theatre*, or **Cancel** to abort the Rota Import.



When setting up escalation procedures select the rota prefix that you have imported, containing the rota information about actors (Engineer/Manager etc), their roles, contact numbers and Theatres (area offices).

All you need to do is to set up the order of the escalation procedures using ***New Action***.

If Theatres are used, you must use the DBtable *or* Theatre Allocation *control to create a link to the respective Theatres (area offices).*

Rota Import Specifications

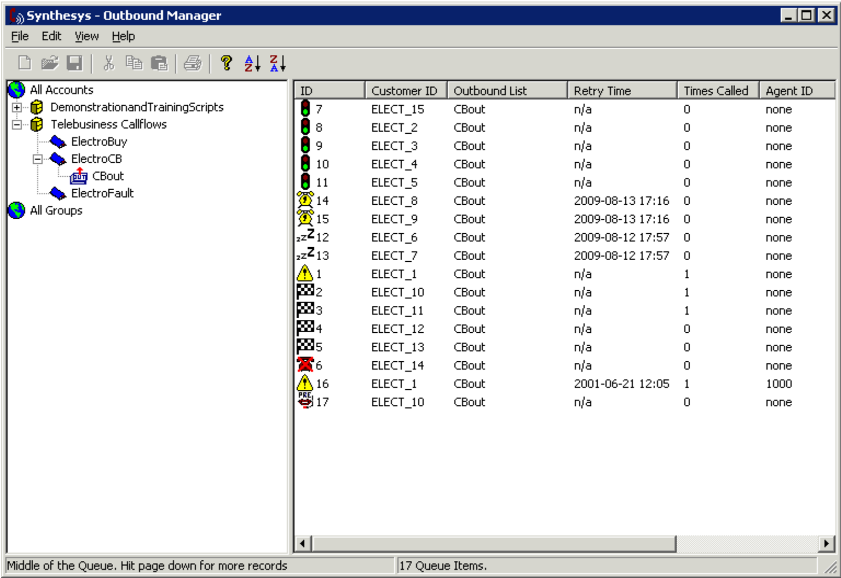
Field	Description	Mandatory	Type
ID	A unique ID for each actor (Engineer/Manager etc)	**Mandatory**	Numeric, a unique identifier
Prefix	The Rota Prefix in use	**Mandatory**	String VARCHAR (10)
ActorName	Name of actor (Engineer/Manager etc)	**Mandatory**	String VARCHAR (100)
Contact	Leave blank if actors have more than one contact number or if you wish to use the Auto Dial option. Use Contact 1-3 instead.	Optional	String VARCHAR (100)
Details	No information required if actors have more than one contact number or if you wish to use the Auto Dial option. Use Contact 1-3 instead.	Optional	String VARCHAR (255)
Theatre	Name of Theatre, if Theatres are used. To *use the Default Theatre* enter the word *Default* or leave blank.	**Mandatory**	String VARCHAR (100)
CONTACT GROUP1			
Contact1	Contact Details: The **first contact number** for an actor. Actors can have up to 3 contact numbers: Contact 1 – 3	Optional	String VARCHAR (80)
Priority1	The Priority for the numbers entered in Contact 1 - 3 Enter **1** to use the Contact1 number as the **first number of contact.**	Optional	Integer INT
Type1	First type of contact, i.e.: Outbound call – Mobile **Available Options:** 'Outbound call - Local', 'Outbound call - National', 'Outbound call - International', 'Outbound call - Mobile', 'Page - Message', 'Page - Bleep', 'Outbound call – Mobile Message', 'Outbound call - Freephone'	Optional	String, VARCHAR (80)
Start1	Contact Starts: the Date/Time from which the number entered in Contact1 is available	Optional	String (date time format '2003-12-31 23:59:59') VARCHAR (20)
End1	Contact Ends: the Date/Time until which the number entered in Contact1 is available	Optional	String (date time format '2003-12-31 23:59:59') VARCHAR (20)

Field	Description	Mandatory	Type
CONTACT GROUP2			
Contact2	The **second contact number** for an actor.	Optional	String VARCHAR (80)
Priority2	Enter **2** to use the Contact2 number as the **second number of contact.**	Optional	Integer INT
Type2	Second type of contact. See Type1 for available options	Optional	String VARCHAR (80)
Start2	Contact Starts: the Date/Time from which the number entered in Contact2 is available	Optional	String (date time format '2003-12-31 23:59:59') VARCHAR (20)
End2	Contact Ends: the Date/Time until which the number entered in Contact2 is available	Optional	String (date time format '2003-12-31 23:59:59') VARCHAR (20)
CONTACT GROUP3			
Contact3	The **third contact number** for an actor.	Optional	String VARCHAR (80)
Priority3	Enter **3** to use the Contact3 number as the **third number of contact.**	Optional	Integer INT
Type3	Third type of contact. See Type1 for available options	Optional	String VARCHAR (80)
Start3	Contact Starts: the Date/Time from which the number entered in Contact3 is available	Optional	String (date time format '2003-12-31 23:59:59') VARCHAR (20)
End3	Contact Ends: the Date/Time until which the number entered in Contact3 is available	Optional	String (date time format '2003-12-31 23:59:59') VARCHAR (20)
Role	The Role of an actor, I.e. Engineer or Manager etc.	**Mandatory**	String VARCHAR (255)
Start Date/time	The date and time from which the actor is on duty	**Mandatory**	String (date time format '2003-12-31 23:59:59') VARCHAR (20)
End date/time	The date and time until which the actor is on duty	**Mandatory**	String (date time format '2003-12-31 23:59:59') VARCHAR (20)

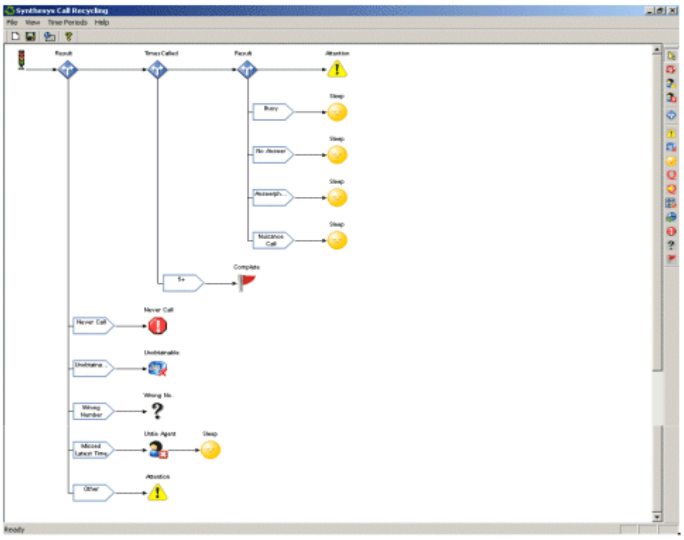
Group contact details are only 'optional', if the contact group is NOT to be used. If the contact group is used, all fields need to be populated.

OUTBOUND MANAGER

Queued Calls



Synthesys Call Recycling



OUTBOUND MANAGER

INTRODUCTION

Outbound Manager

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

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

Selective Queuing Import ("SQI")

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

The SQI Wizard provides a guide through the various steps of the queuing import.

Synthesys Scripted Call Recycling

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

Decisions to enable branching and a range of icons can be dropped anywhere in a *Recycling script*, determining the type of action to be taken on a call. Every recycling rule ends up in a conclusion, specifying what should happen next to the call.

Noetica Predictive Dialler

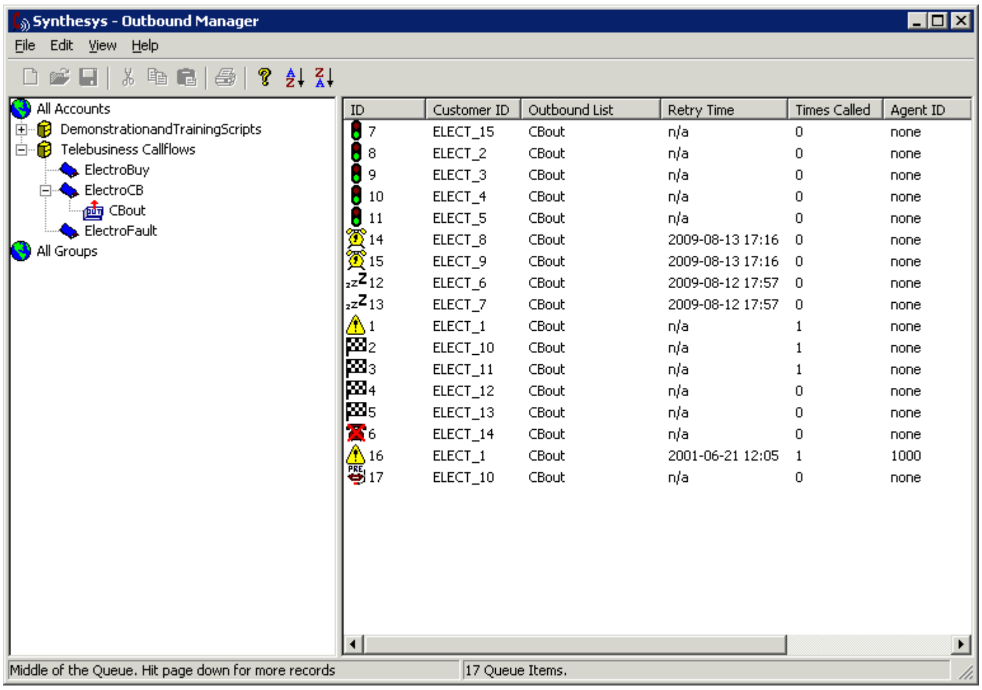
The Noetica Predictive Dialler receives precise information from within the callflow about the progress of each agent through a campaign.

The Predictive Dialler thus knows when agents are about to become free and it uses this information to calculate the number of calls to dial and to place in a queue for the agents to respond to.

The Outbound Manager Main Screen

To open the *Outbound Manager* main screen, displaying a list of all client accounts and campaigns set up in Synthesys:

- Click on ***Outbound*** under the **Setup** heading in the Synthesys main screen.
- 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.*

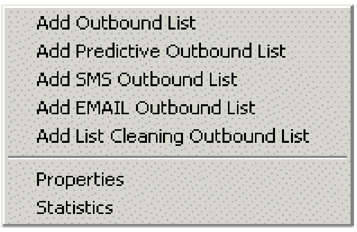
A **red book** *is displayed if the campaign does not contain a CRM.*

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

ADDING PREVIEW OUTBOUND LISTS

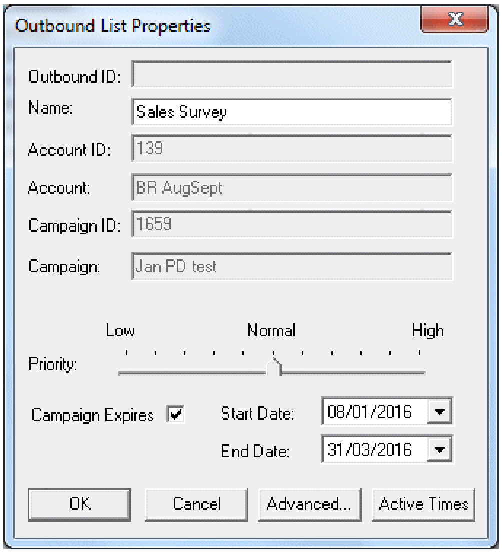
To add a preview outbound list:

- 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.

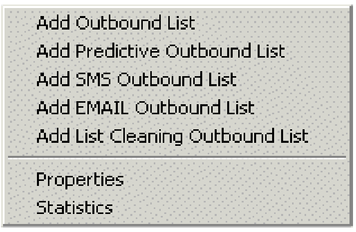
*Please see the section **Setting Active Times** for information about setting the time periods for presenting queued calls to the agents.*

*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

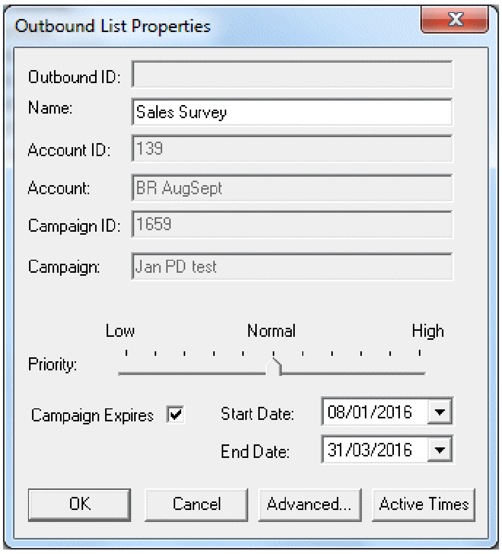
To add a predictive outbound list:

- 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.

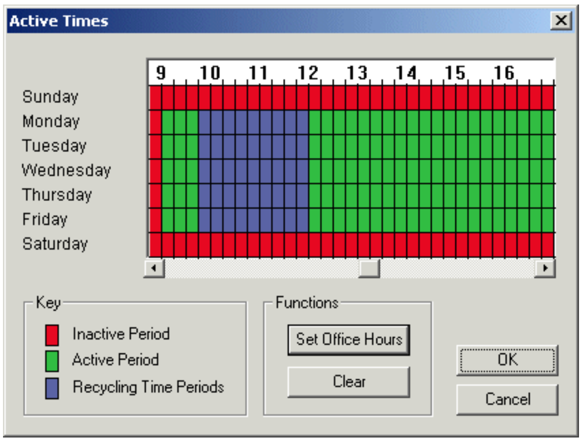
*Please see the section **Setting Active Times** for information about setting the time periods for presenting queued calls to the agents.*

*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

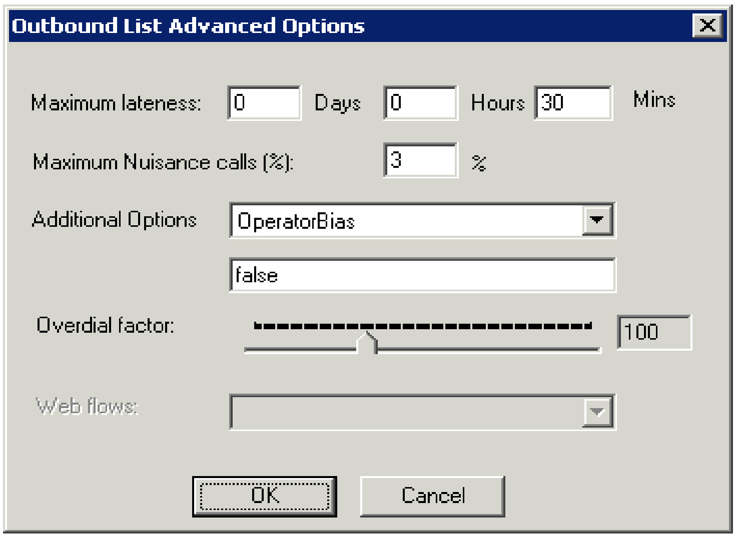
*Default **Active Times** are set from 09:00 to 17:30. These settings can be changed in the Synthesys.inf file. Please ask your System Administrator, or contact Noetica for more information.*

***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 OUTBOUND LIST OPTIONS

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.

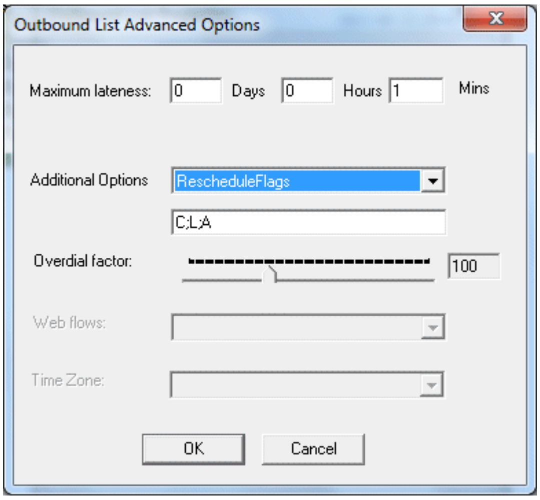
Available Options	Use
MinCallsBeforePredictive	Enter the minimum number of calls to be dialled for this campaign, before predictive dialling starts, max is 99.
No answer timeout	The number of seconds the Switch allows the call to ring, before dropping it as no answer.
Operator Bias	**True or False**. 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

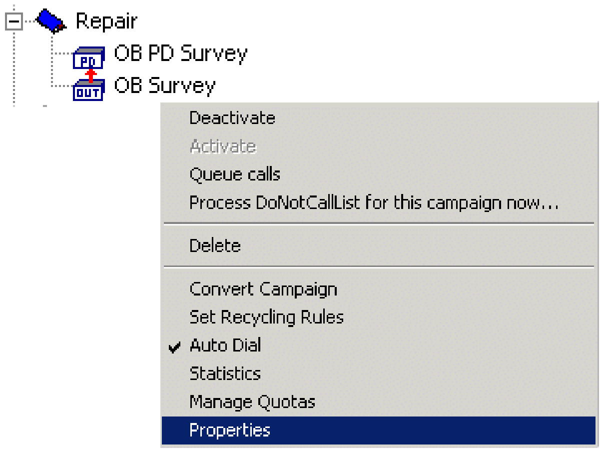
The order of C and L in the Advanced *properties dialog determines the order in which the telephone numbers are displayed in the Reschedule dialog, i.e. if L is entered before C, the last number dialled is shown at the top of the list.*

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

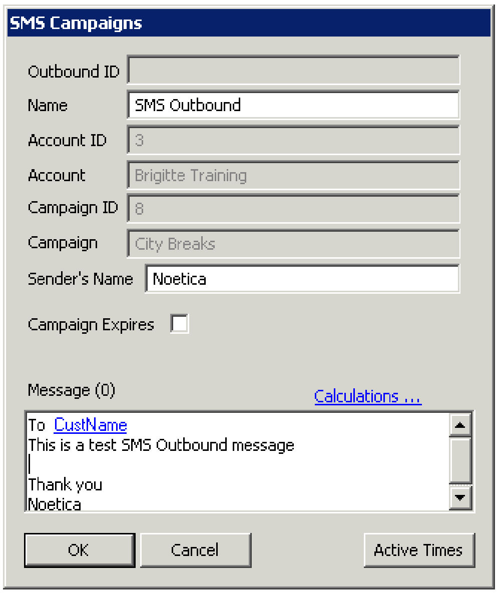
SMS outbound lists are used to send bulk SMS to customers. This functionality can also be used as part of a full contact strategy. For example, customers could be called three times and then they could be sent an SMS, followed by an email.

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.

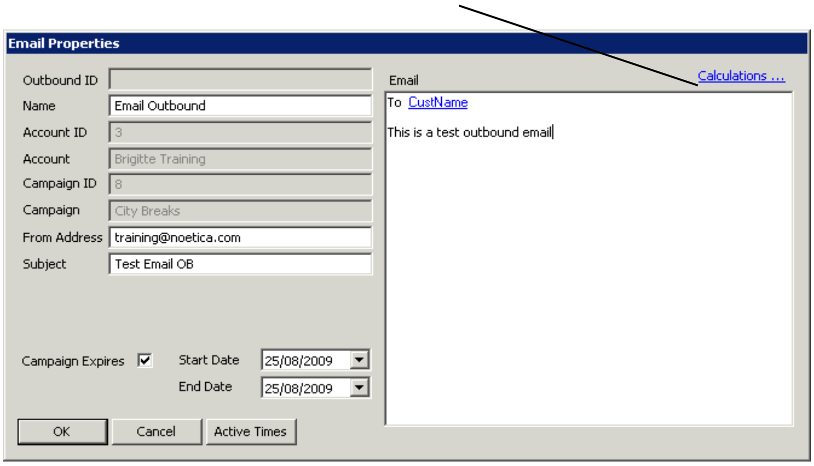
To send **bulk emails** you need to set up a separate **Email Outbound list**.

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.

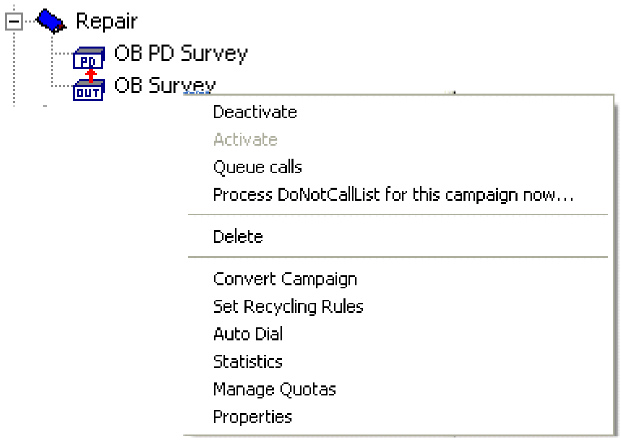
Select the SMS or Email Outbound list that you have created earlier, to place the calls in the queue of the selected list.

- 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.



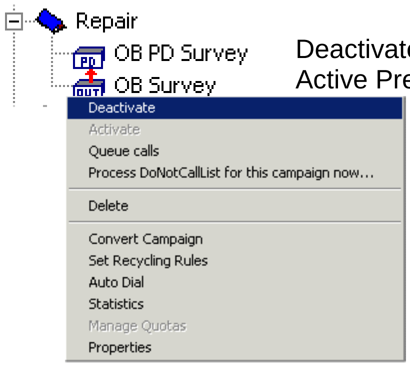
Option	***Uses To***
Activate / Deactivate	Activate the Outbound list to present calls from that list to the agents, deactivate if calls should not be presented.
Queue calls	Place customers to be called into the Outbound list.
Process DoNotCallList for this campaign now	Checks the telephone numbers in 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.



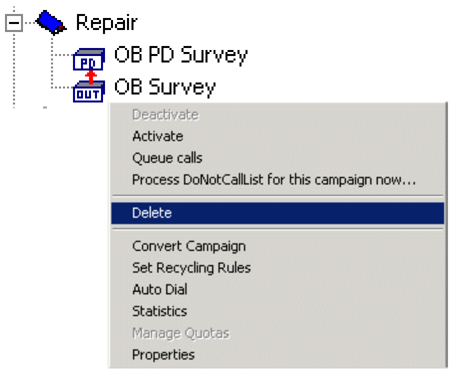
Deactivated Predictive Outbound List
Active Preview Outbound List

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.

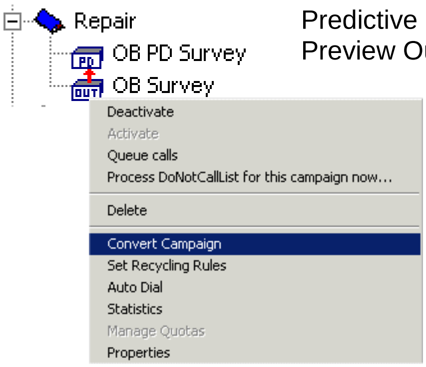
To delete an outbound list:

- Select ***Delete*** from the drop down menu.
- Click ***Yes*** to delete the outbound list and associated queued calls.



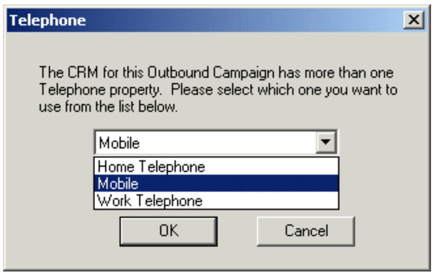
Converting Outbound Lists

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.

Setting Recycling Rules

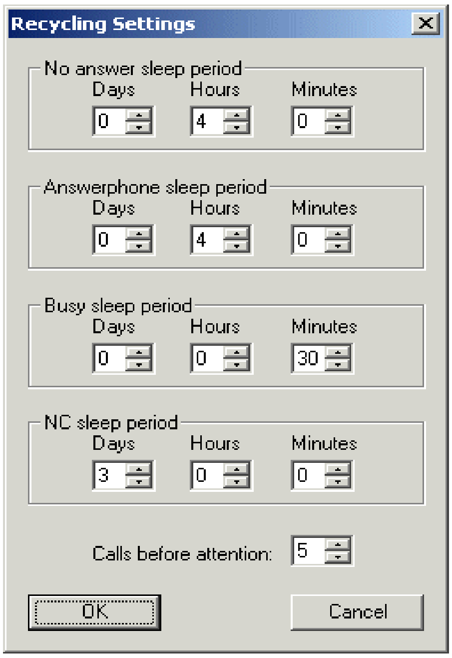
When agents taking calls abort an Outbound call selecting *Answerphone, Busy or No Answer* a sleeping icon will *be* displayed next to that call in the Outbound Manager.

To adjust the sleeping (recycling) periods for individual outbound list:

- Right click on the relevant outbound list and select ***Set Recycling Rule*** from the drop down menu to display the Recycling Settings window.

- Under the aborted type outcome of *Answerphone, Busy, or No Answer,* adjust the settings to the desired number of days, hours and minutes.

You can also adjust the sleeping period for ***Nuisance calls*** (*NC sleep period*) and set the maximum number of call attempts before setting the call outcome to ***Attention*** supervisor (*Call before attention*)**.**



If you have a licence to use the Synthesys Call Recycling Designer, the Recycling Designer will open, instead of the Recycling Settings window.

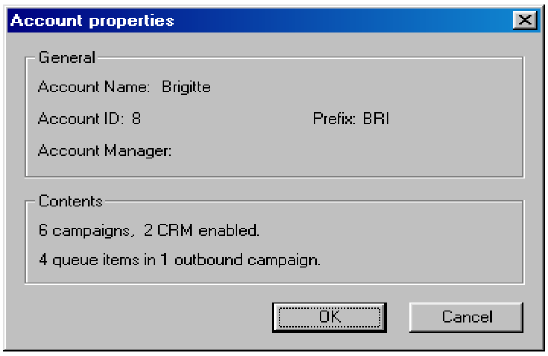
For more information, see the section: ***Synthesys Call Recycling****.*

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.

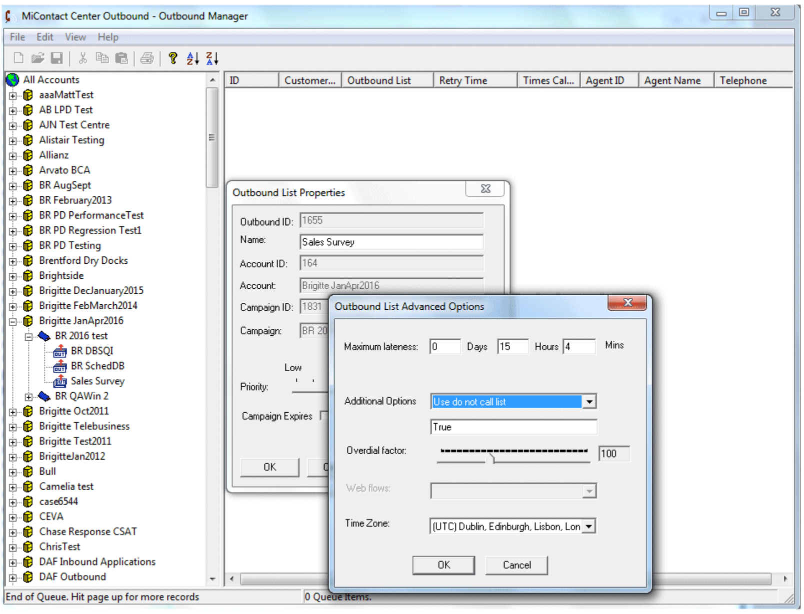
The contact numbers of persons to be removed will have to be added by the client into the Telephone field of the ***PHOENIX_DoNotCallList*** *table on the Synthesys server.*

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:

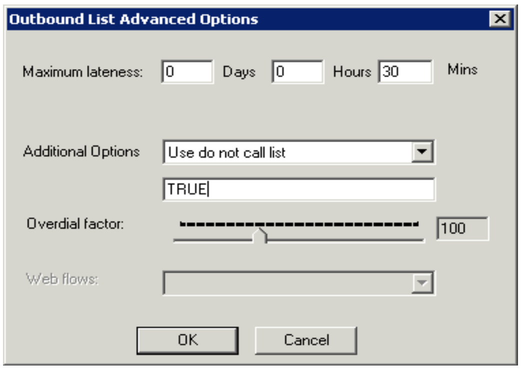
- Right click on the outbound list for which you want to enable the *Do Not Call List* feature and choose ***Properties*.**
- In the *Properties* window click the ***Advanced*** button and select **UseDoNotCallList** from the *Additional Options* drop down menu.



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.

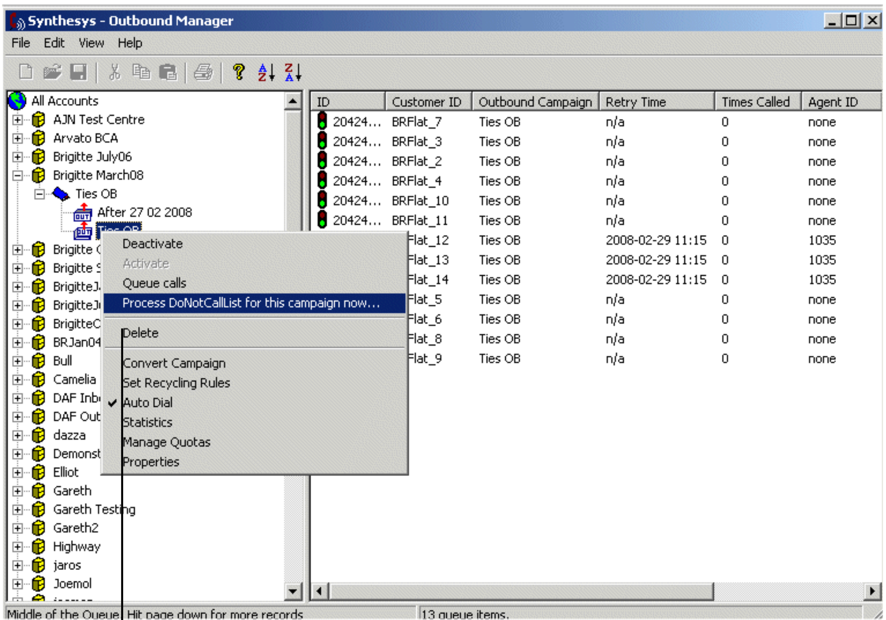


The Do Not Call List check is carried out at 3 am in the morning, every day.

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.

MANAGING QUOTAS

Introduction

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.

When the Outbound list is deactivated, no new calls will be presented to the agents.

The target may be exceeded when there are several agents already in a call for a campaign that has reached its target.

You can specify more than one call result per outbound list.

Example of multiple call results in one condition:

- When a specified number of calls with result A or B are achieved for Today() then deactivate the campaign.

Example of multiple conditions:

- When a specified number of calls with result A are achieved OR when a specified number of calls with result B is achieved, deactivate the campaign.

Quota targets can be changed whilst the campaign is live, without agents having to log out to pick up the changes made.

Defining Quotas

To set up Quotas:

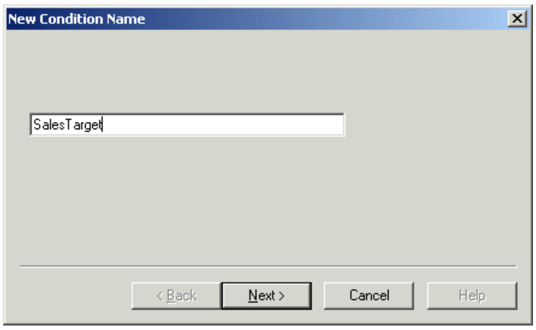
- Open the Outbound Manager clicking ***Outbound*** under the **Setup** heading of the Synthesys main screen.

- Locate and right click on the outbound list for which you want to define quotas and select ***Manage Quotas*** from the drop down menu.

A series of Wizard pages will now guide you through the process of defining the conditions that you wish to specify for your quotas.

New Condition Name

- Enter a name for the condition in the *New Condition Name* window and move to the Next> page of the wizard.



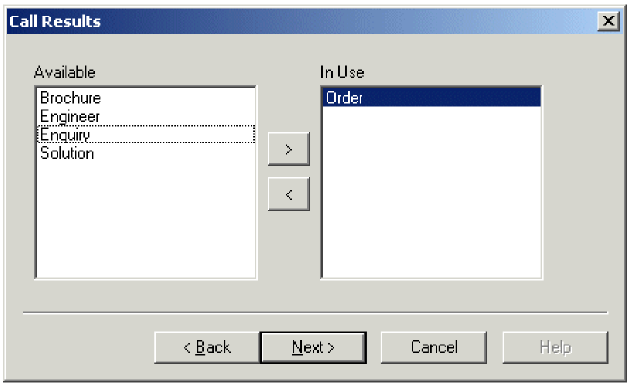
Call Results

To define the call results that you wish to use:

- Click on the relevant call results in the ***Available*** window.

- Use the **>** button, to move the results into the ***In Use*** window.

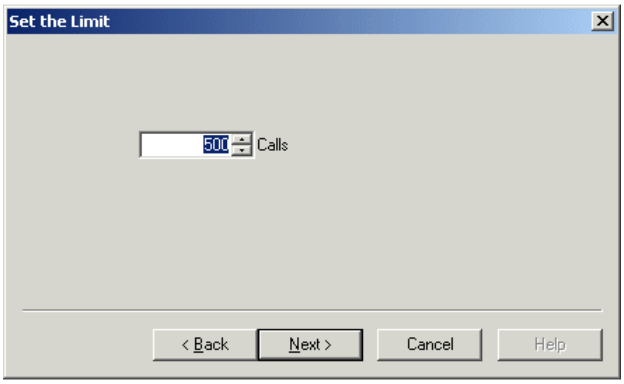
- To move the call result from the *In Use* window back into the *Available* window, use the **<** button.



Specifying Number of Calls

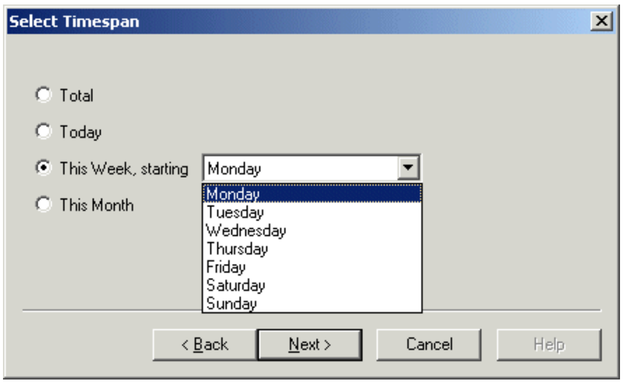
- In the *Set the Limit* window, specify the number of calls to be taken on selected call results.

Once this target is reached, the outbound list will be deactivated automatically.



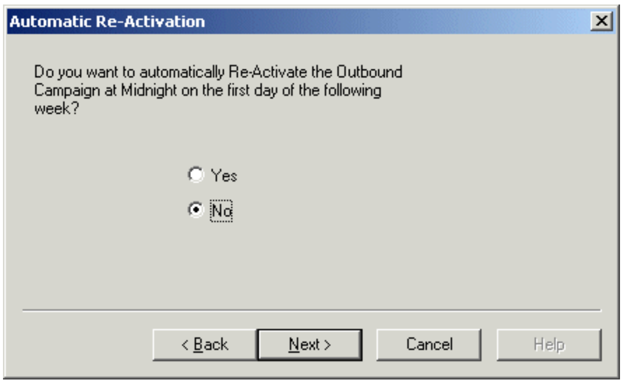
Selecting Time-span

- Next, select the time period in which the calls should be taken.



Automatic Re- Activation

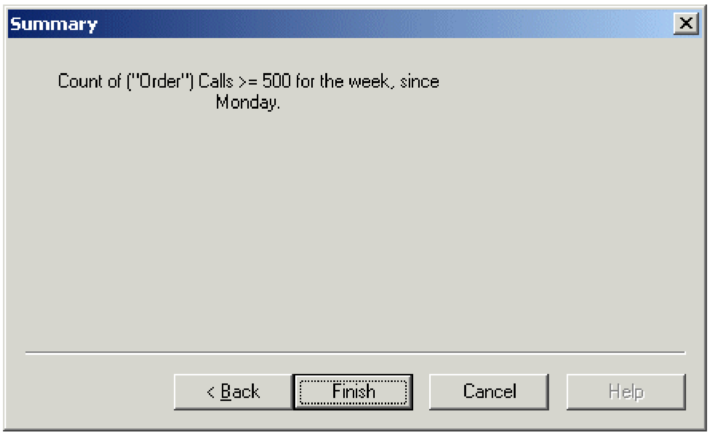
- Click ***Yes*** if you wish to activate the outbound list automatically the following day, week or month, depending on the time-span condition set, else select *No*.



Summary

The final window of the wizard displays a summary of the condition specified, including call result(s), time range and the number of calls to be taken.

- Click ***Finish*** to save the specified condition for the quota.

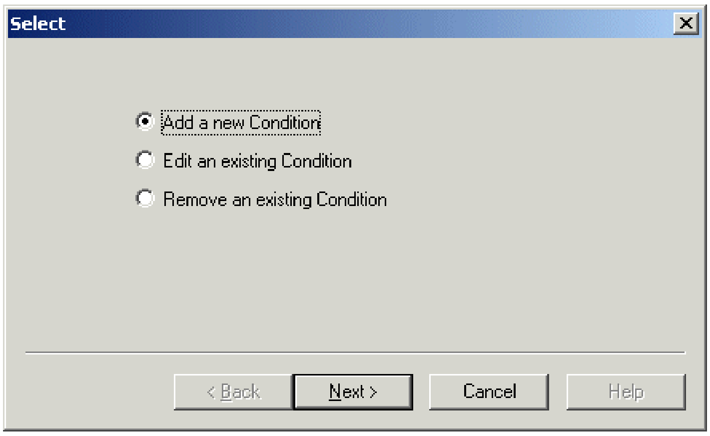


Adding further Conditions to an existing Quota

To add further conditions to an existing quota:

- Locate and right click on the relevant outbound list and select ***Manage Quotas.***

In the first page of the Wizard you can ***Add a new Condition***, ***Edit*** an existing Condition or to ***Remove*** an existing Condition.



- To add a new condition, click **Add a new Condition**.
- Move through the wizard as descript in the ***Defining Quotas*** section.
- Click ***Finish***, to save the new condition for the quota.

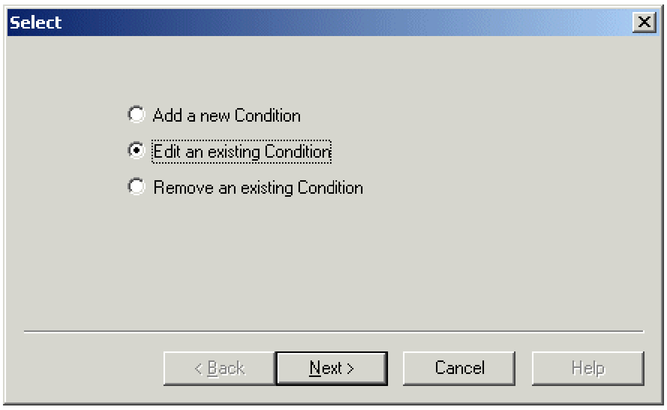
Editing existing Quotas

When a Quota for a particular call result has been met, any changes made to the quota on this call result will be ignored.

To edit or create a new quota on a call result where a quota has been met already, you need to delete the Outbound list and created a new one.

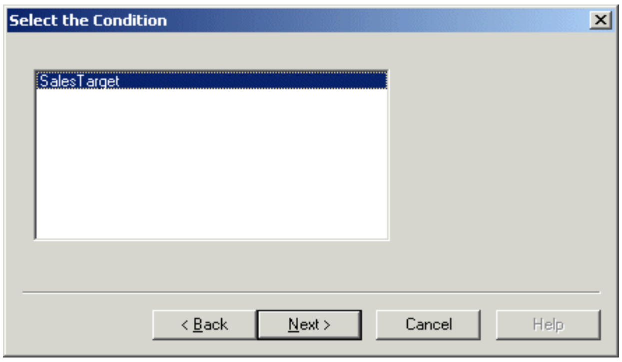
To edit conditions for an existing quota:

- Locate and right click on the outbound list and select *Manage Quotas.*
- In the first page of the wizard select ***Edit an existing Condition***.



Selecting the Condition

- In the next page of the wizard, select the name of the condition that you which to edit.

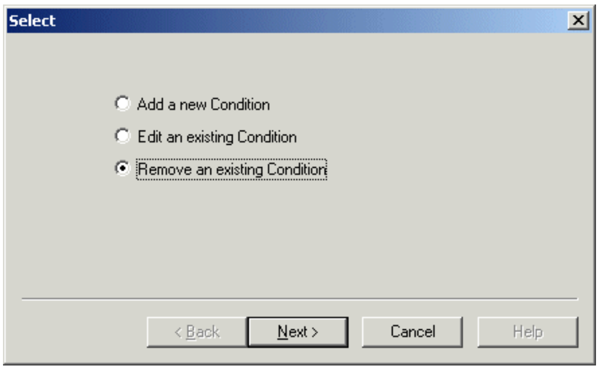


- Follow the pages through the wizard, adding or removing call results, specifying the number of calls on selected call results and time-span, as descript in the *Defining Quotas* section.

Removing existing Quota Conditions

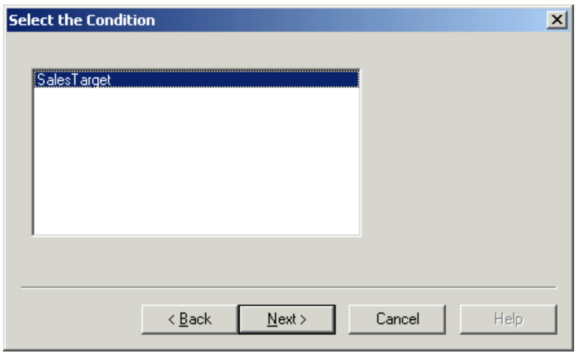
To remove conditions of an existing quota:

- Right click on the relevant outbound list and select **Manage Quotas.**
- In the first page of the Wizard select ***Remove an existing Condition***.



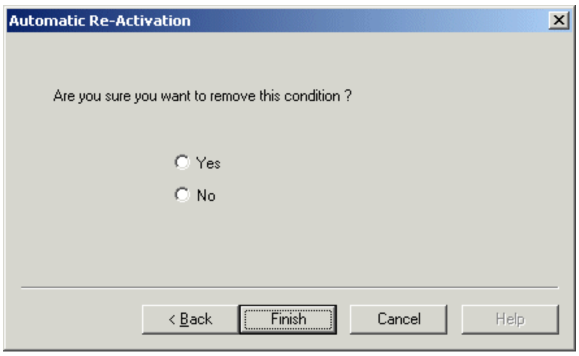
Selecting the Condition

- In the second page select the name of the condition that you which to remove and move to the Next> page of the wizard.



Deleting the Condition

- Click ***Yes*** if you wish to delete the selected condition and click ***Finish***.



Re-activating an Outbound list with attached Quotas

When re-activating an outbound list that was de-activated because the predefined target set in *Manage Quotas* was achieved, a message will be displayed, reminding you that the Quota for this outbound list has been met.

If you decide to reactivate the Quota as well, you will need to edit the Quota, before agents can take calls on the Outbound List.

Whether or not the quota is activated depends on the historical data for the corresponding call results held in the Phoenix_Statistics table.

OUTBOUND GROUPS

Outbound Groups are used to present agents with a combination of calls from multiple campaigns and outbound lists. Using outbound groups, agents don't need to complete the calls of one outbound list first, before being presented with calls from another.

Outbound Groups are used in conjunction with the Team Manager. A team can be set up with several agents and

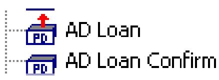
- An Outbound list
- An Outbound Group, itself containing one or more Outbound lists
- A combination of several of these

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.

The following pages describe how to add predictive or preview *Outbound Groups*, how to select outbound lists to assign to the groups and how to enter a weighing factor for a selected Outbound list.

All Groups

Open the ***All Groups*** icon to show all existing Outbound Groups:

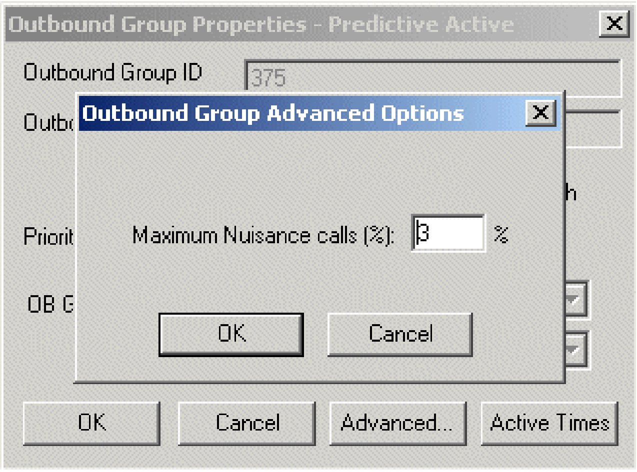
Icon	Displays
	Active Preview Group Inactive Preview Group
	Active Predictive Group Inactive Predictive Group

Under each Outbound group the Outbound lists within that group are shown, displaying the name of the account, campaign and outbound list.

Adding a Predictive Outbound Group

To add a predictive Outbound Group:

- Right click on the *All Groups* icon in the Outbound Manager and select ***Add Outbound Predictive Group*** from the drop down menu.
- In the *Outbound Group Properties* dialog, enter a name for your predictive outbound group in the ***Name*** field.
- Tick ***Campaign Expires,*** if you wish to specify a *Start Date* and *End Date* during which the predictive outbound group is active.
- Set your ***Active times*** for the outbound group.



To set the Maximum Nuisance call
rate (%) click the *Advanced* tab.

Set the Active times for the group via the *Active Times* button.

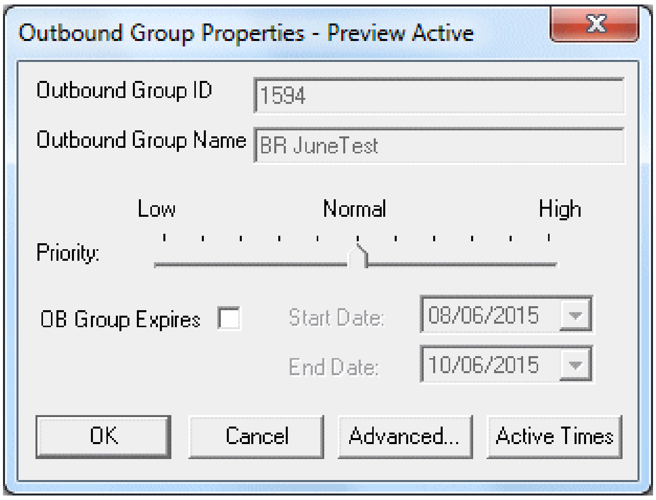
Advanced Options for Predictive OB Groups

Available Options	Use
Dial Prefix	An appropriate dial prefix can be entered (e.g. 9 to dial out).
MinCallsBeforePredictive	Enter the minimum number of calls to be dialled for this campaign, before predictive dialling starts, the max is 99.
AMDFalsePositiveRate	False positive rate for answer machine detection.

Adding a Preview Outbound Group

To add a preview Outbound Group:

- Right click on the *All Groups* icon in the Outbound Manager and select ***Add Outbound Group*** from the drop down menu.
- In the *Outbound Group Properties* dialog, enter a name for your preview outbound group in the ***Name*** field.
- Set the ***Active times*** for the outbound group.



Tick *Campaign Expires* to specify a *Start and End Date* for the group.

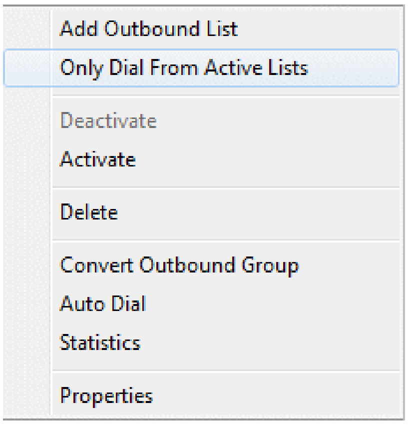
Set the Active times for the group via the *Active Times* button.

Advanced Options for Preview OB Groups

Available Options	Use
Dial Prefix	An appropriate dial prefix can be entered (e.g. 9 to dial out).
AMDFalsePositiveRate	False positive rate for answer machine detection.
Idle Timeout	***Set Idle Timeout,*** to automatically pop records from preview outbound lists within the group, by entering, in seconds (i.e.15), the interval for the screen pops. By default, no Idle Timeout is set, agents need to click the *Get Next Record* icon at run time to request the next preview call.

Outbound Group Context Menu

Right click on an Outbound Group to bring up the context menu.



The following options are available:

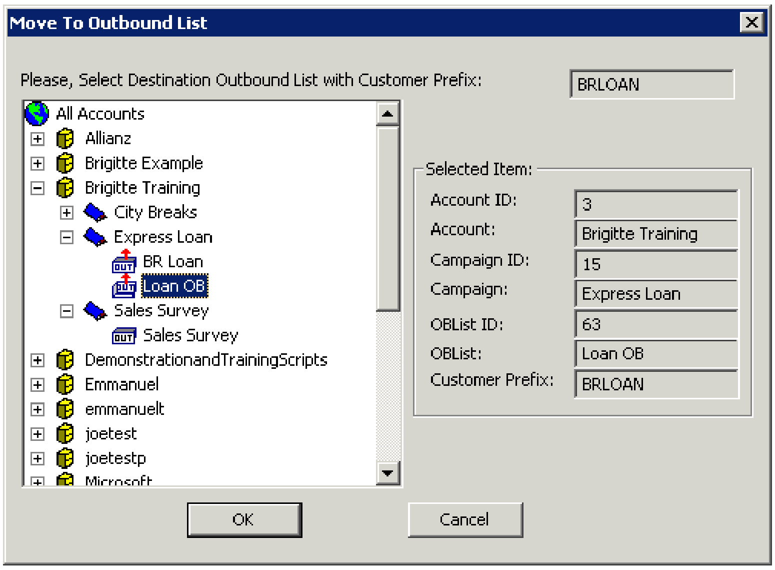
Option	***Used To***
Add Outbound List	Add an existing Outbound list to your Outbound group.
Only Dial From Active Lists	Uses campaign level values, rather than group level values. If the option is ticked, records will only be dialled from active/ non expired outbound lists.
Deactivate	Deactivate an active Outbound group.
Activate	Activate a deactivated Outbound group.
Delete	Delete the group and associated records in phoenix_obgroups. This does not delete interior campaigns.
Convert Outbound Group	Convert different types of Outbound Groups, i.e. preview Outbound groups to predictive groups and vice versa.
Auto Dial	Tick/ untick the auto dial feature to automatically dial the telephone number of a preview Outbound call, without agents having to click the 'Dial' icon of the CTI toolbar.
Statistics	Bring up combined statistics for contained campaigns.
Properties	Open the Outbound group properties dialog.

Adding Outbound Lists to Outbound Groups

To add an Outbound list to your group:

- Right click on the group and select ***Add Outbound List*** from the drop down menu.

This opens the *Select Outbound List* dialog. Expand the ***All Accounts*** icon to display all the currently defined outbound lists (not groups).



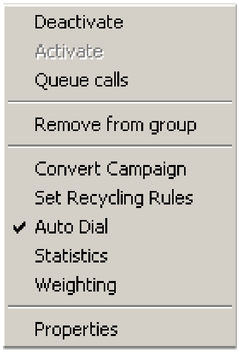
- Locate and select the desired outbound list.

- Click OK to add the Outbound list to the group.

To close the *Select Outbound List dialog* without adding an outbound list click the ***Cancel*** button.

Context Menu of Outbound lists within Group

Right click on an Outbound list within a Group to bring up the context menu.



The following options are available:

Select/ Tick	To
Deactivate	Deactivate an Outbound List, if it is ‘Active’.
Activate	Activate the Outbound List, if it is ‘Inactive’.
Queue calls	Place customers to be called into the queue of the O/B Manager.
Remove from group	Remove an Outbound List from an Outbound Group.
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/ untick the auto dial feature, to automatically dial the telephone number of a Preview O/B call, without agents having to click the ‘Dial’ icon of the CTI toolbar.
Statistics	View statistical information of queued calls.
Weighting	Invoke the weighting dialog, where you can set the ratio of calls the Dialler should present from selected Outbound Lists.
Properties	Access Account & Campaign information.

The options Deactivate, Activate, Queue Calls, Convert Campaign, Set Recycling Rules, Auto Dial, Statistics and Properties are the same as in the Outbound List context menu.

The options ***Remove from group*** and ***Weighting*** are descript on the next page.

Remove from Group

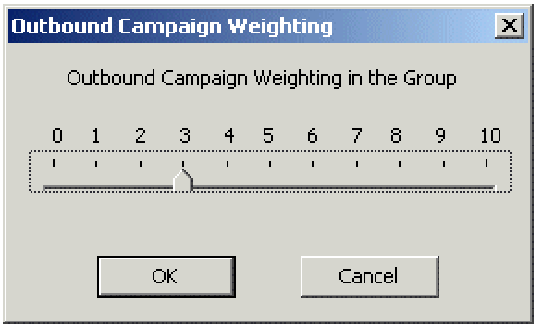
The ***Remove from group*** option removes an Outbound list from the group, but does not delete the outbound list.

Outbound List Weighting

In the Weighting dialog, you can set the number of calls the Dialler should take from a selected Outbound List, before moving to the next.

To open the ***Weighting*** dialog:

- Right click on your Outbound list within the group. The values go from 1 to 10, with the default value for weighting set to 3. You then can, for example, set another campaign to have three times as many, or x times fewer calls, as the one set to the default.
- To adjust the setting, use the slider to determine how many calls of this outbound list will be allocated.



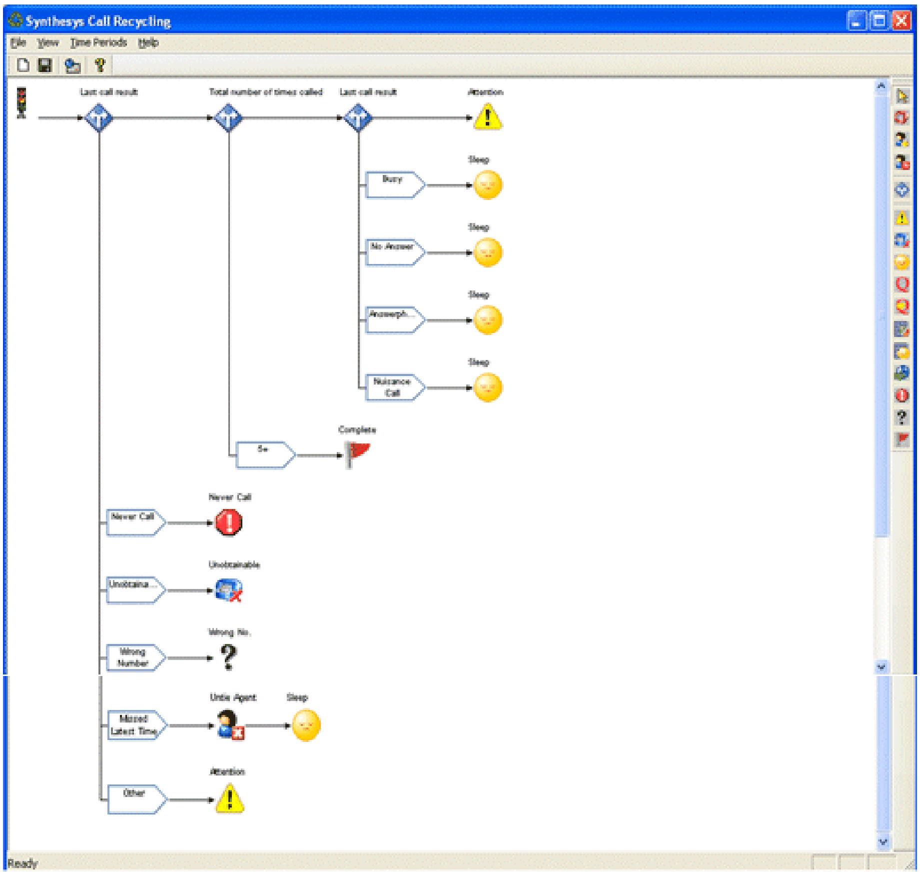
In the Team Manager you can set up different teams and assign specific Outbound groups and call lists to the individual agents.

For further information regarding the Team Manager, please see the section ***Synthesys Team Manager*** in the latter part of this Training brochure.

For agents to be able to take calls on an Outbound group it has to be activated and Active Times must have been set for the Outbound group.

*If the option **Use Campaign Properties** is ticked, the Outbound lists assigned to the group also have to be activated and set to active times.*

Synthesys Call Recycling



SYNTHESYS CALL RECYCLING

INTRODUCTION

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

Decisions to enable branching and a range of icons can be dropped anywhere in a *Recycling script*, determining the type of action to be taken on a call. Every recycling rule ends up in a conclusion, specifying what should happen next to the call.

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

Launching the Call Recycler

To launch the Synthesys Call Recycling Designer, right click on your outbound list and select ***Set Recycling Rules*** from the drop down menu.

Active Times

The only available Time Periods that can be selected in the Time Period window of the Recycling Designer are those that have been set to ‘Active’ in the ‘Active Times’ window when setting up your outbound list.

Multiple Telephone Numbers

When queuing customers, ensure that the telephone number that you select as the first number for contacting a customer, is the same, as the number on which you want to start off your recycling rules.

Synthesys Scripted Call Recycling is not a standard feature but has to be purchased separately.

THE RECYCLING DESIGNER

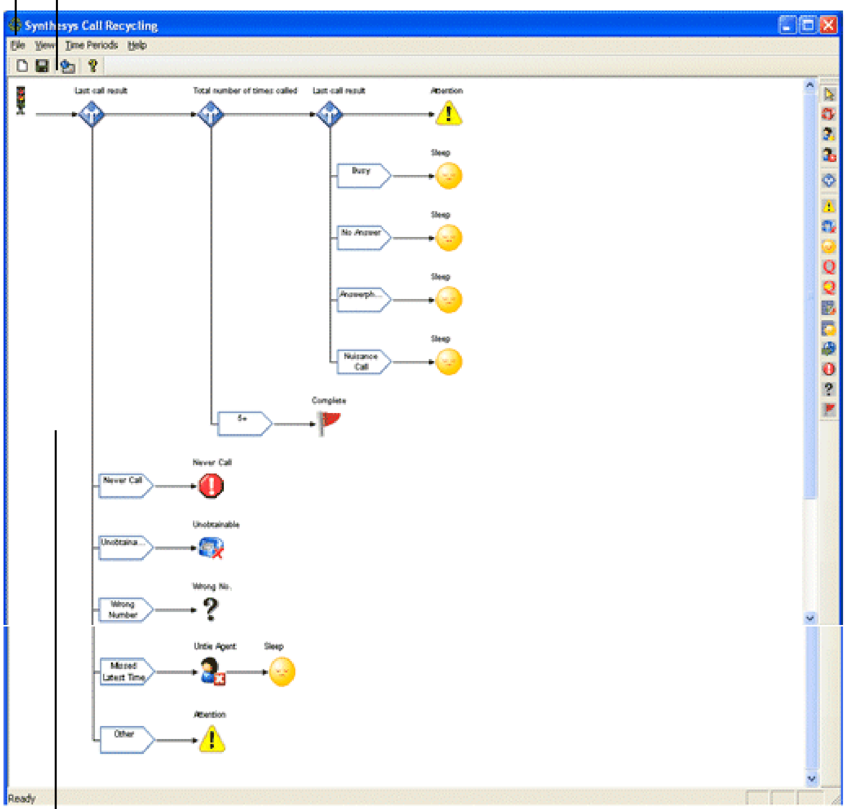
The Synthesys Call Recycling Designer is launched from the Outbound Manager.

- Click on ***Outbound*** under the **Setup** heading of the Synthesys main screen.
- Locate and right click on your outbound list and select ***Set Recycling Rules*** from the drop down menu.

The Synthesys Call Recycling Designer has a default recycling script attached.

Users can edit the recycling rules of the default flow to meet particular requirements or design a totally new recycling script.

Menu Bar
Standard Toolbar



Design Area
Recycling Toolbar

The following sections describe each of the elements indicated above.

The Menu Bar

The *Menu Bar* at the top of the *Recycling Designer Screen* provides access to a series of menu options via four pull down menus.

File Pull Down Menu

Menu Option	Used To
New	Create a new Recycling Script
Save	Save and Release the Recycling Rules
Copy Script	Copy the currently opened Recycling script to a destination Outbound List
Exit	Close the Recycling Designer and return to the Outbound Manager Screen.

View Pull Down Menu

Menu Option	Used To
Toolbar	Hide or display the Toolbar. A tick next to this option indicates that the Toolbar is currently visible.
Status Bar	Hide or display the *Status Bar*. A tick next to this option indicates that the *Status Bar* is currently visible.

Time Period Pull Down Menu

Menu Option	Used To
Edit	Open the *Time Period* window to add, edit or delete time periods.

Help Pull Down Menu

Menu Option	Used To
About Recycling Designer	Display version details of the Synthesys Call Recycling Designer you are running.

THE TOOLBARS

The Synthesys Call Recycling Designer has two toolbars.

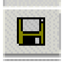
The Standard Toolbar
The Recycling Toolbar

When you first access the *Synthesys Call Recycling Designer*, the *Standard Toolbar* is positioned directly below the *Menu Bar* and the *Recycling Toolbar* is positioned on top of the *Design Area*.

The toolbars can be placed anywhere in the Synthesys Call Recycling Designer. They can be positioned at the top, bottom, or to the left or right of the Design Area. Alternatively, they can be placed on top of the Design Area as a floating toolbar.

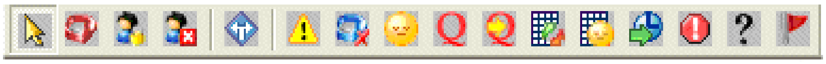
The Standard Toolbar

The Standard Toolbar is positioned directly below the Menu Bar on the Recycling Designer Screen:

Option	Used To
	Start a new Recycling Script.
	Save and Release the currently displayed Recycling Script.
	Open the Time Period window to select or create time periods.
	Display information about the version of the Recycling Designer.

The Recycling Toolbar

The *Recycling Toolbar* lets you build recycling rules quickly and easily.



Activate the selection tool.

Change the Telephone Number to call.

Tie to Agent, to ensure that the agent who took this call will get the call when it is recycled.

Untie from Agent, to allow any agent to take this call when it is recycled.

Add a New Decision to enable Branching on different criteria and events.

Change state to **Attention**.

Change state to **Unobtainable**.

Sleep the call, for example, sleep a 'busy' call for ten minutes'

Queue the call to this campaign, with the number of times called remaining unchanged.

Re-queue to this campaign but set the original call to *Finish* and queue as a new call, with the number of times called being set to zero (0).

Change Campaign will queue the call to a new campaign and marks the call as *Finish* in the original campaign.

Change Campaign and Sleep will queue the call as a sleeping call to a new campaign and marks the call as *Finish* in the original campaign.

Retime (sleep) the call for a particular time band, as set in the Time Period Menu. The time band requires the call to have been dialled either by the PD or manually in Take Calls pressing the Dial button, unless 'Auto dial' is ticked in the Outbound Manager.

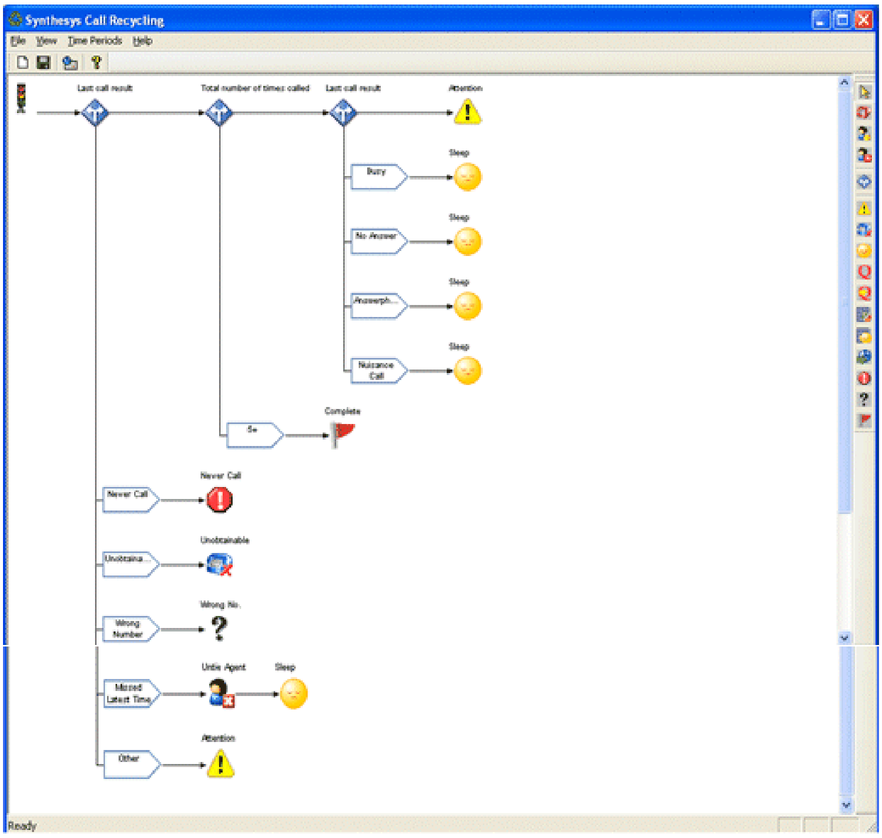
Never Call, shows a list of all clients that do not wish to be contacted again.

Wrong Number, refers to an incorrect number associated with a client to be called.

Change state to **Strategy Complete**. Thus the call is not processed through any other recycling rule and is marked as 'Finished'.

DEFAULT RECYCLING RULES

When opening the *Synthesys Call Recycling* window, the default recycling script is displayed.



The recycling rules of the default recycling script are explained in the next section.

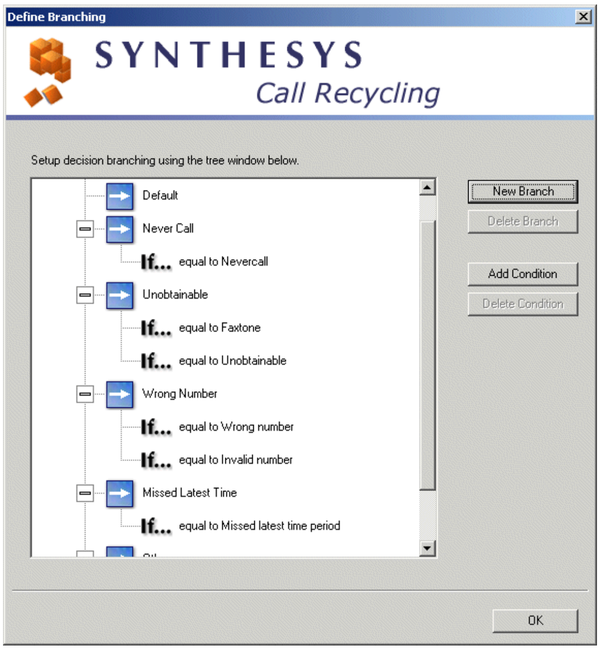
Decisions and Branches in the Default Script

Result Decisions 1& 2

If a call is aborted, we have assigned specific outcomes into our Default script.

Aborted Type	Outcome
Never Call	Never Call
Unobtainable & Faxtone	Unobtainable
Wrong & Invalid Number	Wrong Number
Missed latest time period	Untie from agent, then Sleep for 1min
Other	Attention
Busy	Sleep for 30min
No Answer	Sleep for 4hours
Answerphone	Sleep for 24hours
Nuisance Call	Sleep for 3 days

The branches that we have created reflect these call outcomes and contain the appropriate 'if….' condition.



Result Branch 1

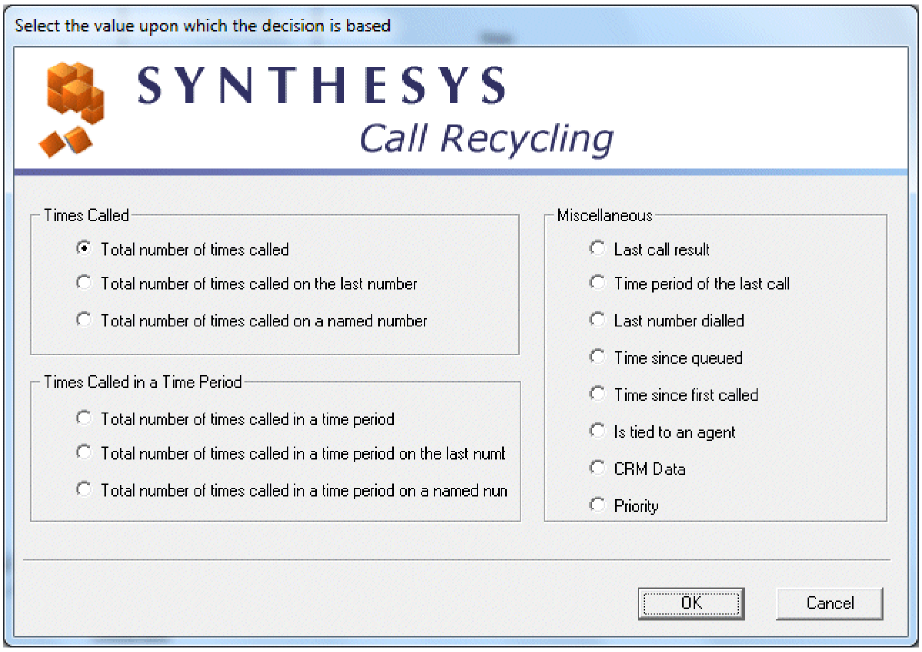
For each of the required Outcomes we then have placed the relevant Conclusion icon at the end of the branch.

Times Called Decision and Branch

Calls in our default script will go to ***Strategy Complete***, if a number has been dialled five times or more, without reaching the customer.

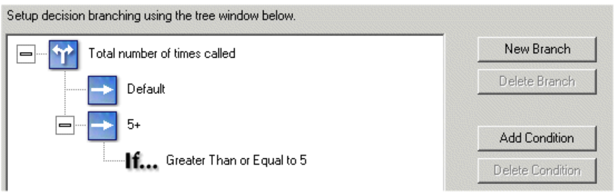
We have picked up a ***New Decision*** and placed it after the traffic lights, to display the ‘Select the value…’ window.

From the options available, we have selected ***Total number of times called***, then clicked OK.



Double clicking on the Decision point opens the Define Branching window, where we have selected the ***New Branch*** button to create a New Branch, called ‘5+’.

Next, we clicked ***Add Condition*** and selected ‘Greater Than or Equal to 5’ from the respective lists.

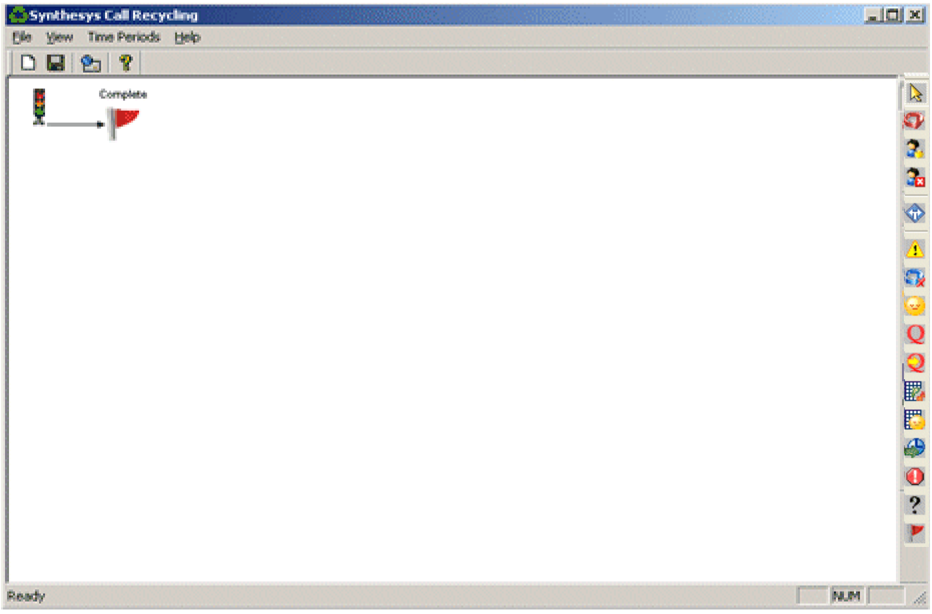


We then dropped the ***Strategy Complete*** icon at the end of the branch.

DESIGNING A NEW RECYCLING SCRIPT

To design a new Recycling script, go to **File – New** on the Menu Bar.

Alternatively click the **'new page'**  icon on the Standard toolbar to display a new Recycling Flow.



The Call Recycling Flow that we will design is based on the following Scenario:

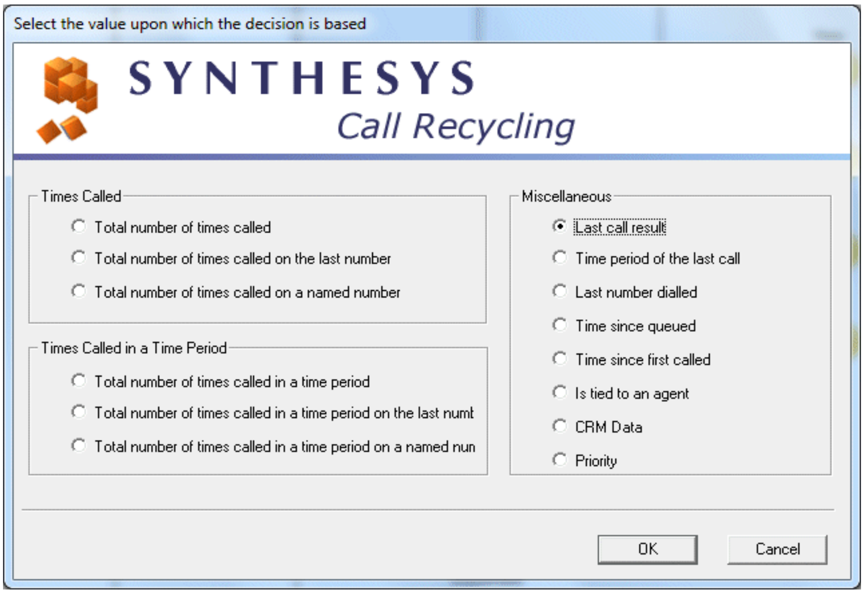
- Calls aborted with 'Never Call', 'Number Unobtainable or Faxtone', 'Wrong Number' or 'Other' should go to the respective conclusion flags.
- Customers initially are to be called on their work number.
- If they can't be reached by the third call attempt, we phone their mobile number.
- If customers still have not been contacted after phoning their mobile number 3 times, we get the agents on the evening shift to call their home number.
- If still no contact has been established after trying the home number twice, we will no longer attempt to contact that customer.
- Calls with a status of 'Busy', 'No Answer', 'Answer Phone' or 'Nuisance Calls' should go to a conclusion with a Sleep time of one-hour.

If you have multiple telephone numbers in your CRM, ensure that you select the correct number as the first telephone number on which to contact the customer, when queuing calls. In our Scenario, this should be the 'Work' number.

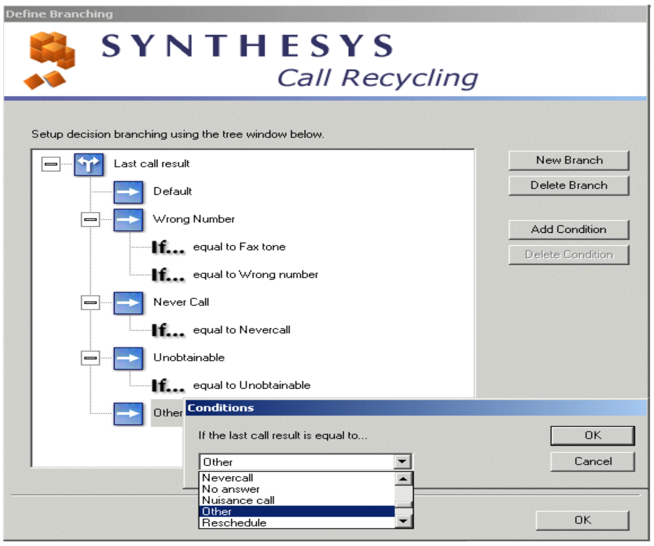
Result Branch Aborted Types

To create a recycling Flow according to the specified requirements, we firstly need to create a New Decision and associated branches for the Aborted Types.

- Pick up a **New Decision**  and drop it after the traffic lights to display the 'Select the value…' window.
- From the options available, select **Last Call Result** and click **OK**.



- Double click on the Decision point, to open the 'Define Branching' window.
- Click New Branch and add a branch for each of the Aborted Types, i.e. 'Wrong Number', Number Unobtainable or Faxtone', 'Other' and 'Never Call'.



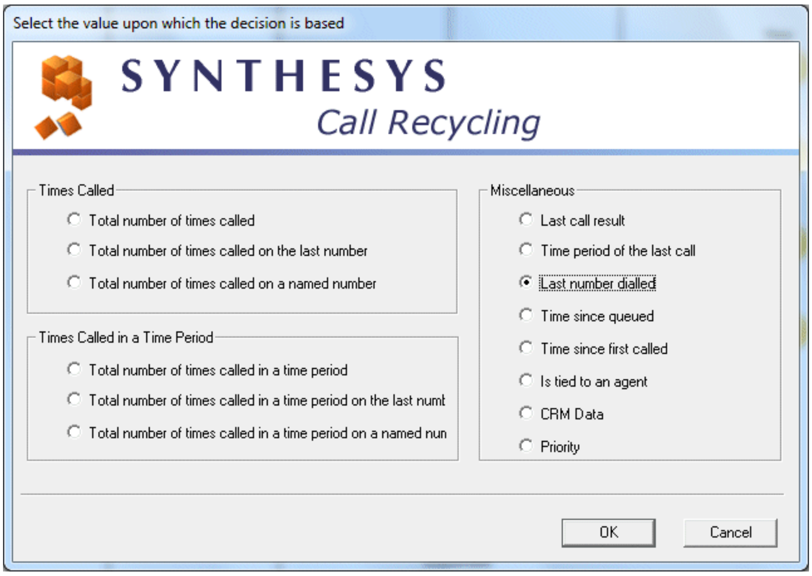
Next, click ***Add Condition*** and select the ***Aborted Type*** for each branch.

Click **OK** in the '*Define Branching'* window to return to the Call Recycling Screen.

New Decision Last Number Dialled

Next, we need to create the decision point and associated branches for the contact numbers.

- Pick up a **New Decision** and drop it on the Default branch, after the 'Result' Decision point. From the options available in the 'Select the value…' window, select **Last Number dialled** and click **OK**.



Select 'Last Number dialled'.

- Double click on the Decision point, click **New Branch,** and add a branch for each of the telephone numbers, i.e. **'Work Number', Mobile Number'** and **Home Number'.**

- Next, click **Add Condition** and select the **relevant telephone** for each branch.

Work Number Branch

We now need to create the recycling rules for each of the selected telephone numbers.

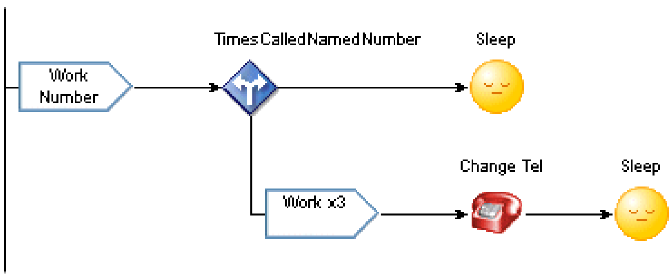
- Pick up a **New Decision**  and drop it on the Work Number branch.

- From the options available in the 'Select the value…' window, select **Number of times called on a named number** and click **OK**.

This time, create a New Branch called 'Work x3' and a Condition 'Greater than or Equal to 3'.

- Next, add a **Sleep** icon to the default line of the Work Number branch and set the sleeping time to 1 hour.

- Add a **Change Telephone** icon to the Work x3 branch and change the number to be called **to Mobile Number**. At the end of the branch add a **Sleep** icon, set to 1 hour.

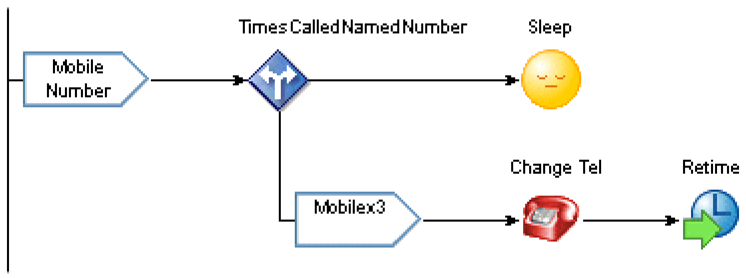


Now create the recycling rules for the Mobile and Home Numbers respectively.

Mobile Number Branch

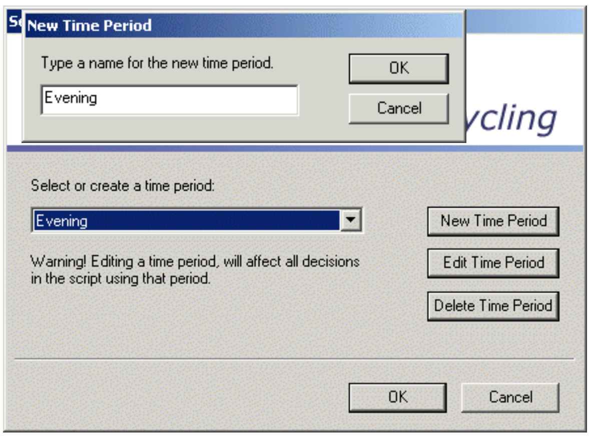
This time, we drop a 'New Decision'  on the Mobile Number branch, again based on 'Number of times called on a named number'. We create a branch called 'Mobile x3', with the Condition 'Greater than or Equal to 3'.

- Add a **Sleep** icon to the default line of the Mobile Number branch and set the sleeping time to 1 hour.
- Add a **Change Telephone** icon to the Mobile x3 branch and change the number to be called **to 'Home Number'**.
- To end the branch, add a '**Retime'**  icon as we wish to call the home number only in the evenings.



Selecting Time Periods

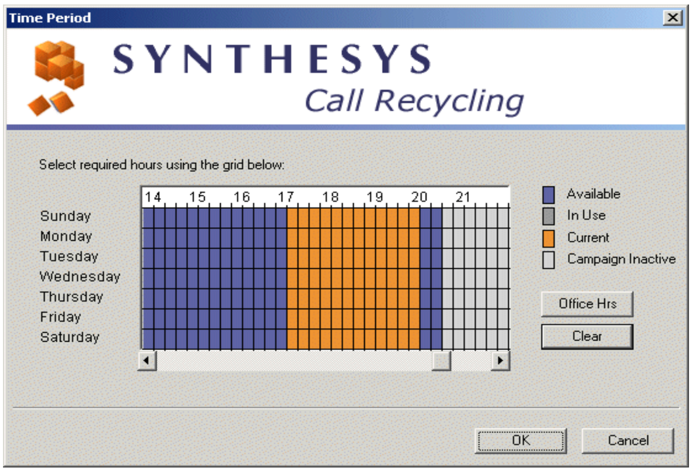
When placing the Retime icon, the **Select Time Period** window opens. Click '**New Time Period'** and enter '**Evenings'** as the name for the time period, then click **OK**.



We now need to select the required time period in the grid of the ***Time Period*** window.

In the **grid** of the ***Time Period*** window, set the required time periods.

The only available Time Periods that can be selected here are those that have been set to 'Active' in the 'Active Times' window when setting up your Outbound List.



The Current active times are displayed in orange colour.

In our example we have set the **Current** active times from 17.00– 20.00.

To set time periods, click and drag your left mouse button in the required cells. To deactivate time periods, use your right mouse button or click the 'Clear' button.

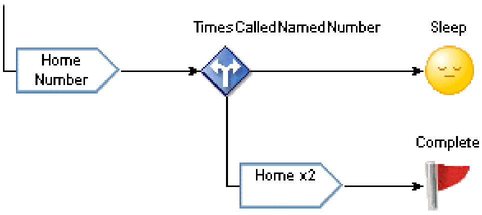
Lavender Blue	Available time periods that can be selected
Dark Grey	Time periods already In Use that can't be selected
Orange	Current active times period, selected for the currently specified time period
Light Grey	The Outbound list is currently 'Inactive' or no active times have been enabled in the 'Active Times' window when setting up your Outbound List

Click **OK** to commit the settings for the selected time period.

Home Number Branch

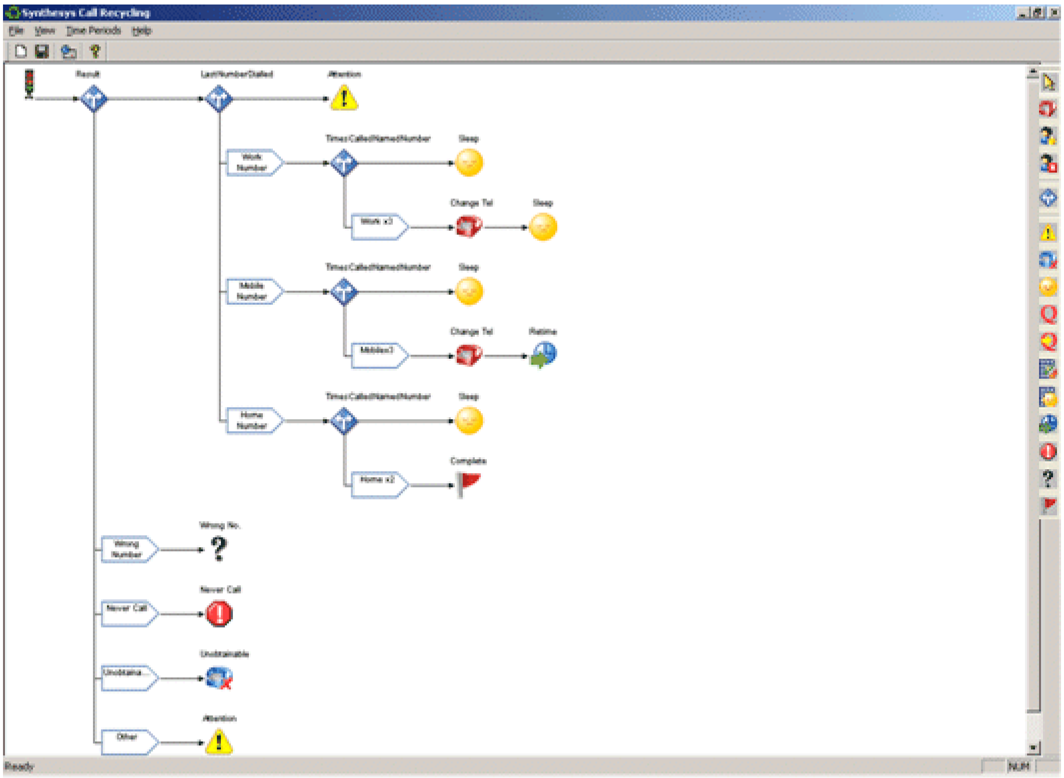
On the Home Number branch, create a 'Home x2' branch, again based on 'Number of times called on a named number', with the Condition 'Greater than or Equal to 2'.

Add a **Sleep icon** (1 hour) to the default '**Home Number'** branch and on the **'Home x2'** branch, add a **'Strategy Complete'** icon. Thus the call is not processed through any further recycling rule but is instead marked as 'Finished'.



Completed Recycling Script

Your completed Recycle Flow should look as follows:



Remember to ***Save*** your recycling rules, before exiting the *Recycling Designer*.

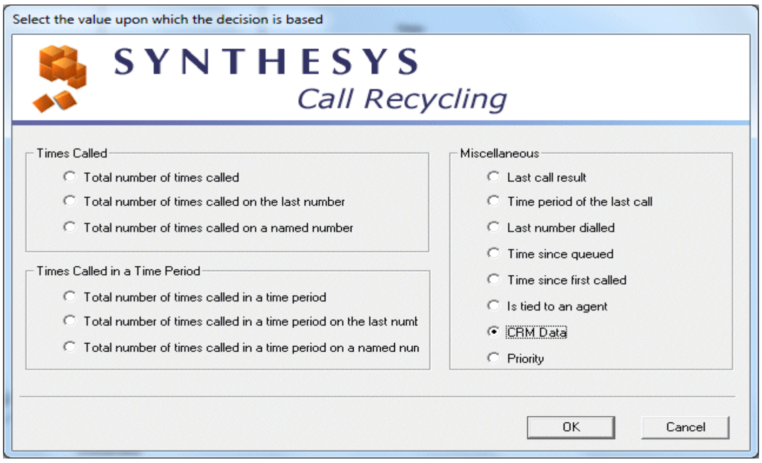
Decisions based on CRM Data

Using the ***CRM Data*** option, users can recycle aborted calls based on information contained within the CRM fields of a campaign.

- Right click on your Outbound list and select **Set Recycling Rules** to open the Recycling Designer:

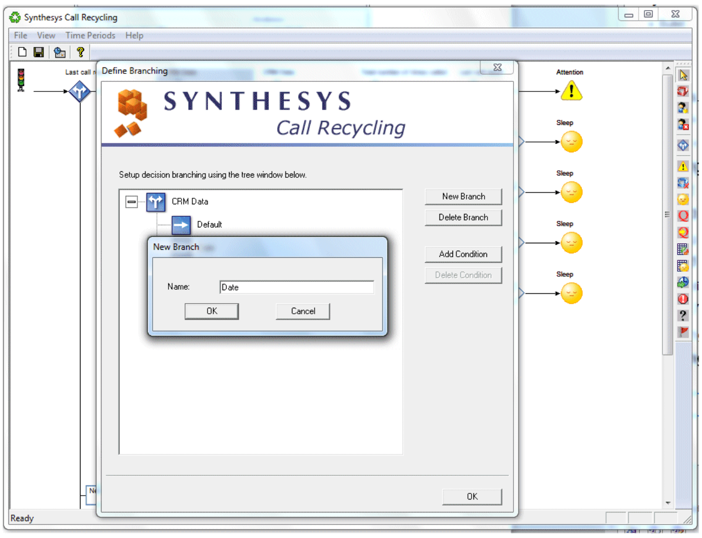
- Pick up a **New Decision** and drop it into your recycling script to display the '*Select the value upon which the decision is based…*' window.

- From the *Miscellaneous* options available, select **CRM Data** and click **OK**.



- Double click on the Decision point and in the ***Define Branching*** dialog, click **New Branch.** Add a new branch entering a logical branch name.

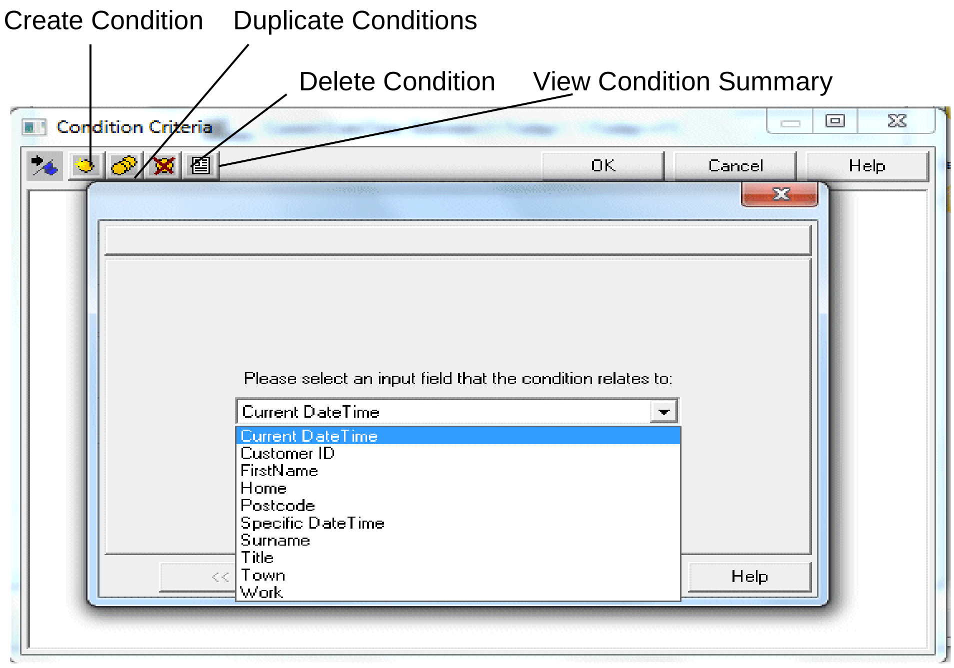
In our example we have created a branch called ***Date.***



Next, click the **Add Condition** button, to open the *Condition Criteria* dialog.

To create a condition based on a CRM field

- Click the ***Create Condition***  icon.
- Select the relevant CRM field to define your condition. In our example we have selected the *CRM DateTime* field **<Current DateTime>**.



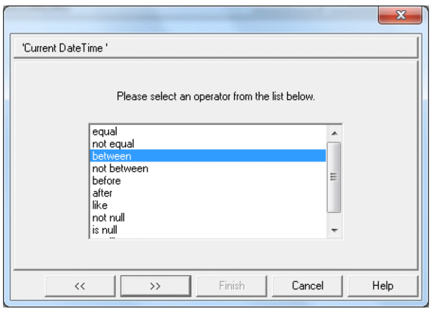
 **Create Condition.** Click this icon, to create a new condition. To **edit** existing conditions, double-click on the relevant condition disc.

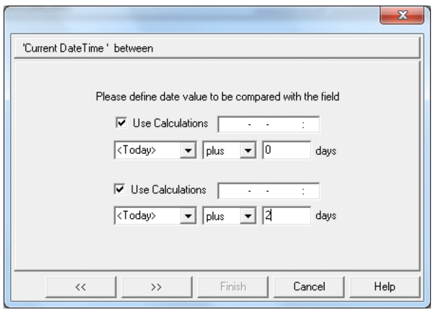
 **Duplicate condition.** Click this icon, to duplicate an existing condition.

 **Delete a condition.** Select the disc that you wish to delete, then click on the 'Delete condition' icon.

 **View condition summary.** Click this icon, to view a summary of all conditions.

- Move to the next pages of the wizard , first selecting the required operator, i.e. '**between',** and then specifying the date and time range for your condition.

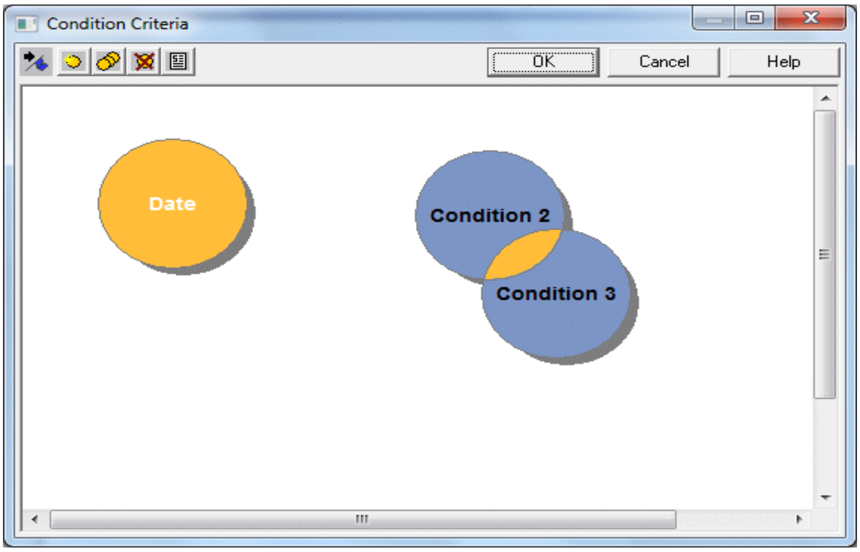




In the next page of the wizard ***add a name for our condition*** and click ***Finish.***

The condition that you have created will be displayed as a *Venn Diagram*, showing a floating disc ‘Date’.

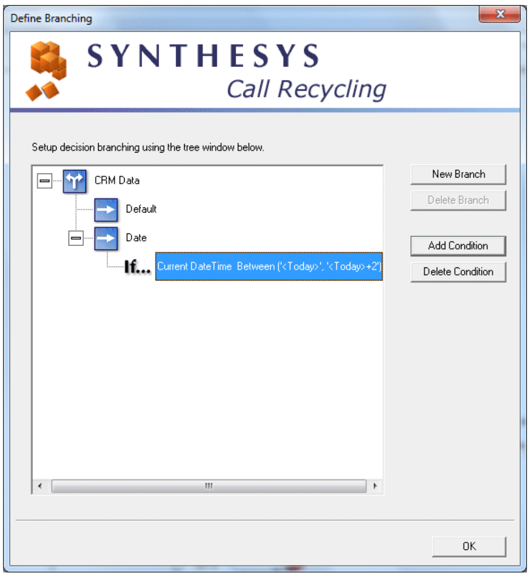
- Further conditions can be defined, clicking the **Create Condition** icon.
- To **edit** existing **conditions**, double-click on the relevant condition disc.



Discs that overlap with one or more other discs imply a Boolean ‘AND’ to operate between the conditions ***(Date)*** OR ***(Condition2*** *AND* ***Condition3).***

Each condition can be manipulated, clicking and dragging it around the canvas. If two discs overlay completely, press ***Control*** *on the keyboard to drag them apart.*

- Click OK to close the *Condition Criteria* dialog and to display the **CRM Data** branch as part of your recycling rules.

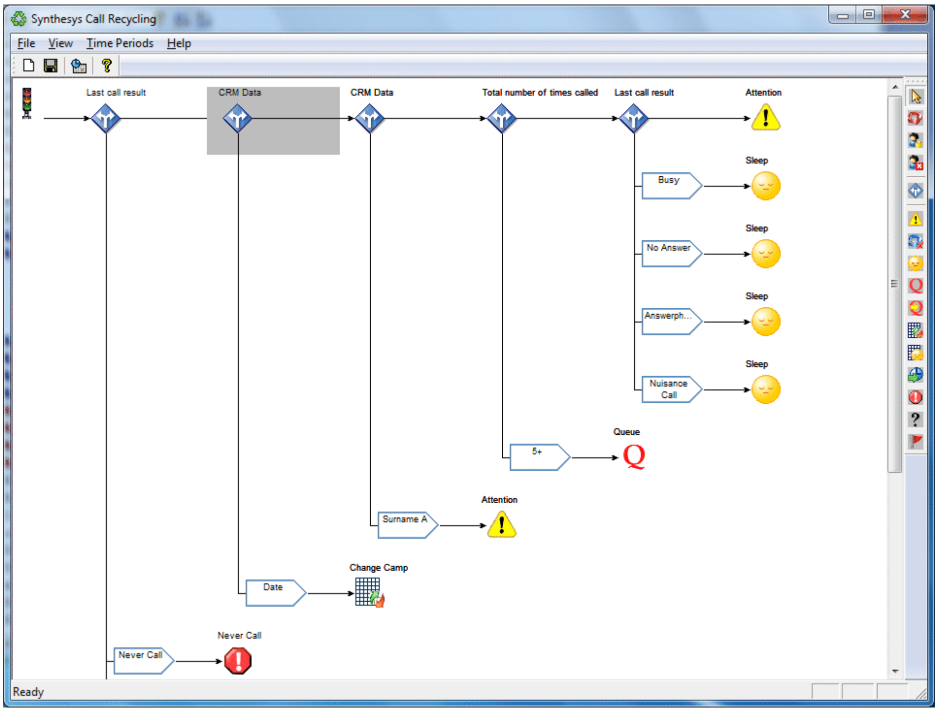


To add the CRM Data branch to our recycling script

- Click **OK** in the ***Define Branching*** dialog, to return to the Synthesys Call Recycling screen.

The **CRM Data** branch will now be displayed as part of your recycling rules.

In our example, we have added a 'Change Campaign' icon at the end of the CRM Data branch, to move aborted calls that match the given criteria to another Outbound list.



Decisions based on Priority of Call

In the Advanced Recycling Designer, aborted calls can also be recycled based on their ***Priority*** setting in the Phoenix_Queue table.

Call priority settings in the Queue table can be changed, for example via Bulk Queue Change selecting from ranges between 0=Idle, 1= Low or 10=High, or by setting a string value, e.g. 'High' or 'Low'.

*In the Outbound List Advanced Options dialog select **PriorityOrder** and enter either **Desc, Asc or None,** to determine how prioritized records are presented to the agents. **Desc** presents calls with higher priority settings first.*

To use the ***Priority*** option as part of recycling rules

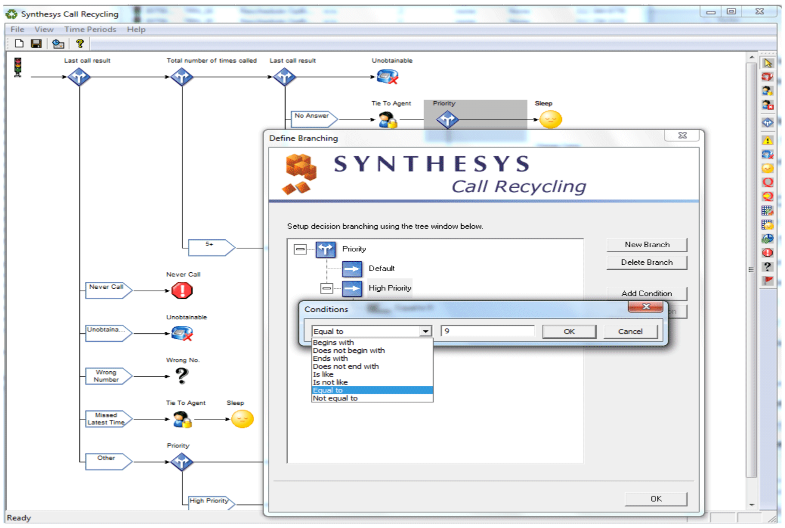
- Right click on your Outbound list and select **Set Recycling Rules** to open the Recycling Designer.
- Pick up a **New Decision** and drop it into your recycling script to display the '*Select the value upon which the decision is based…*' window.
- From the *Miscellaneous* options available, select **Priority** and click **OK**.

Please see next page for more information.

To create the condition based on **Priority**

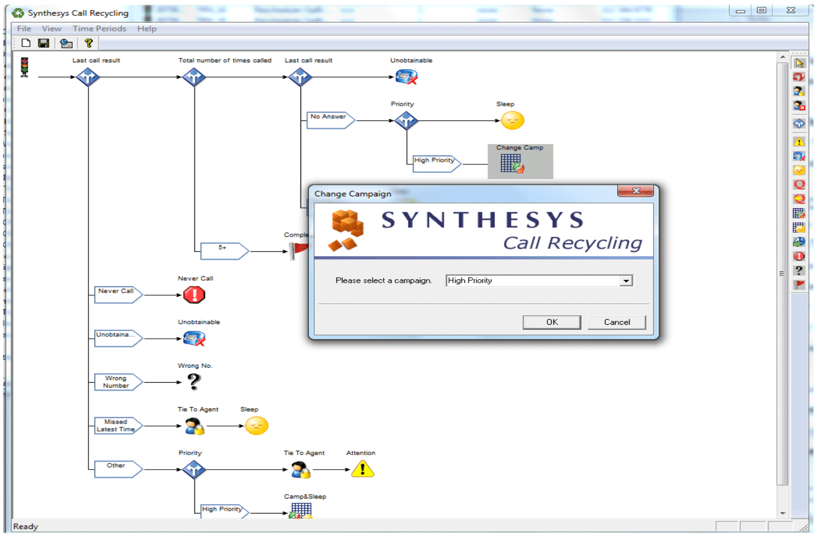
- Double click on the *Decision* point and in the ***Define Branching*** dialog, click **New Branch.** Add a new branch, entering a logical branch name, i.e. **'***High Priority'*.
- Next, click the **Add Condition** button to open the *Condition Criteria* dialog and define your condition, as required.

In our example we have selected ***Equal to*** and entered **9.**



- Click **OK** in the ***Define Branching*** dialog, to return to the Synthesys Call Recycling screen.

You can now define the rules that should apply, for example, move calls with Priority 9 to a High Priority Outbound list.



Remember to ***Save*** your recycling rules, before exiting the *Recycling Designer*.

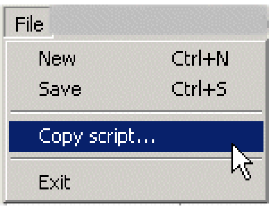
COPYING A RECYCLING SCRIPT

You can copy an existing Recycling script from one Outbound list to another, as long as both outbound lists use the same CRM prefix.

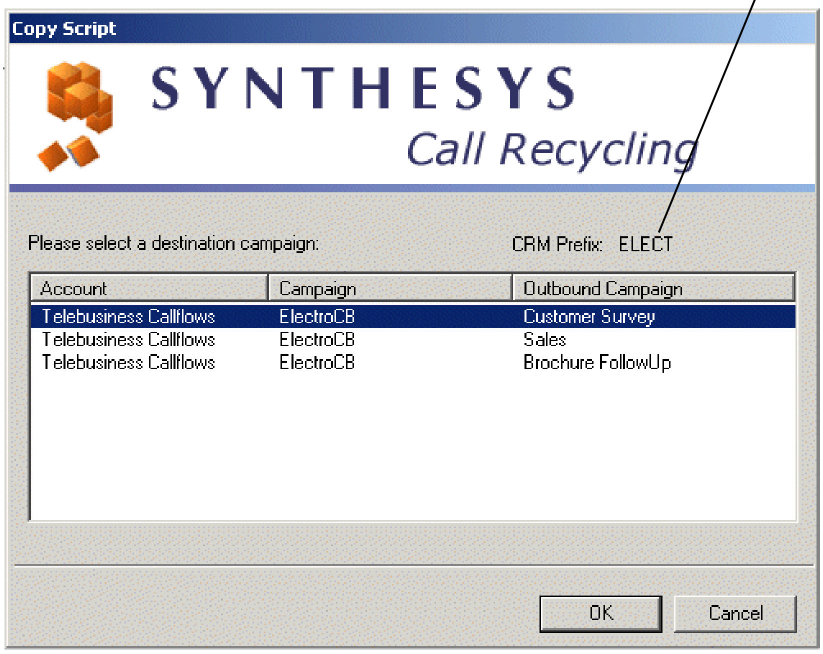
Be aware however that when using the Retime option to set specific time periods for callbacks you must ensure that the Active Times enabled in your destination outbound list match the time periods specified in the Recycling rules that you wish to copy.

In the Recycling Designer:

- Go to *File* on the Menu bar and select the *Copy script* option.



In the ***Copy Script*** window, now displayed, the Outbound lists using the same CRM prefix will be listed. In our example, the CRM prefix is 'ELECT'.



- Select the Destination campaign and click OK.

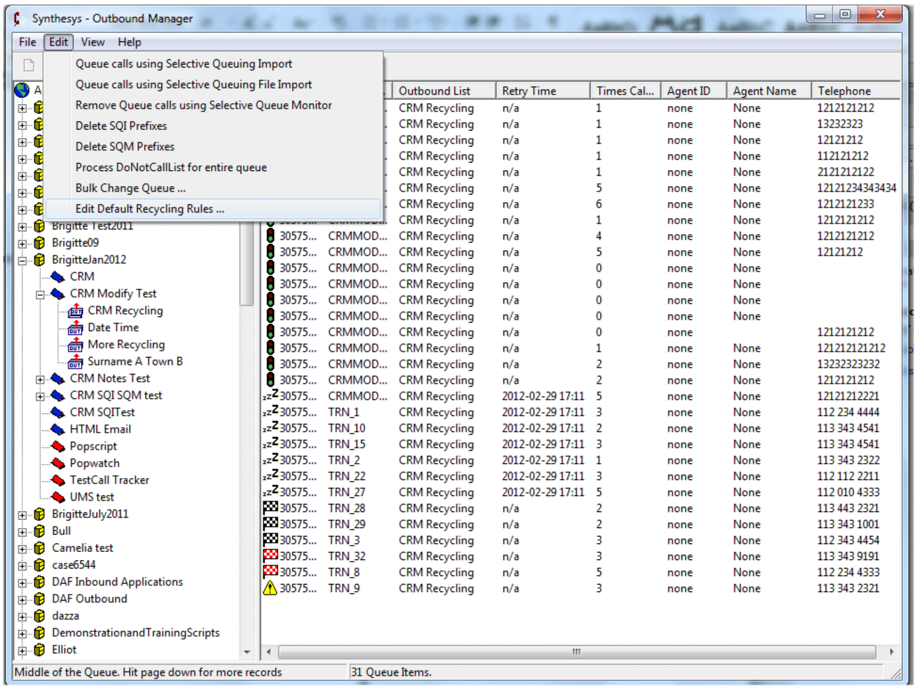
The current recycling script has now been copied to the selected outbound list.

CREATING A RECYCLING RULES TEMPLATE

It is also possible to create a template of recycling rules that fit your own requirements, thus replacing the existing default rules.

To create the template:

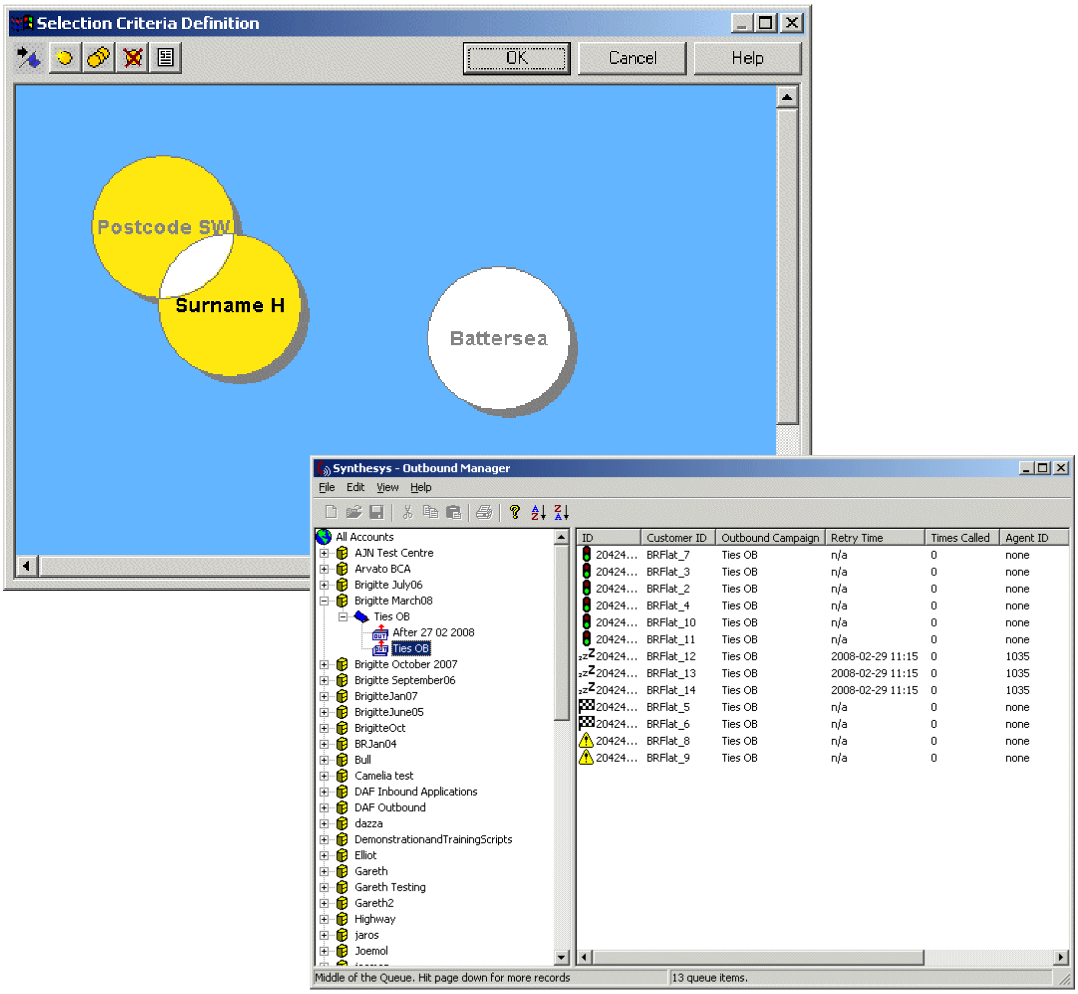
- Go to the ***Edit*** menu in the Outbound Manager and select ***Edit Default Recycling Rules.***



In the ***Recycling Designer*** subsequently displayed, you can edit and save your recycling rules, as required.

*The new **Default Recycling rules** will now be displayed automatically, for any new Outbound list that you set up.*

Queuing Calls

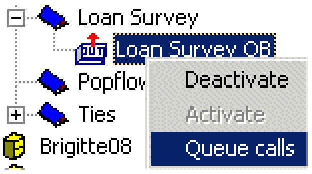


QUEUING CALLS

To place customers to be called into an outbound list:

- Go to ***Outbound*** under the **Setup** heading of the Synthesys main screen to open the *Synthesys Outbound Manager*.

- Locate and right click on the required outbound list and select **Queue calls** from the drop down menu.



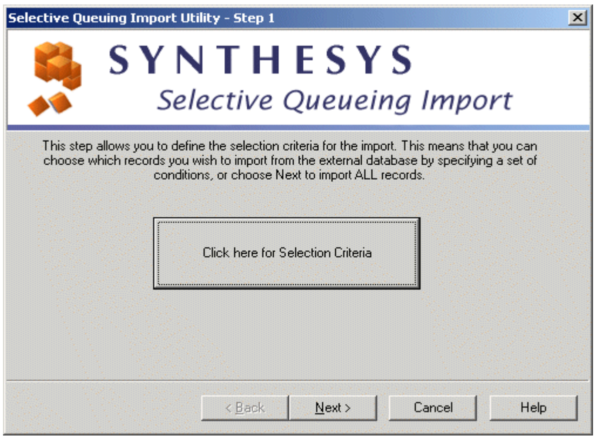
A **Queue *Wizard*** will open, to guide you through the required actions of creating you call list.

*If you wish to queue selected customers based on relatively complex conditions it is recommended that you use the **Queue calls using Selective Queuing*** Import *option via the Edit menu.*

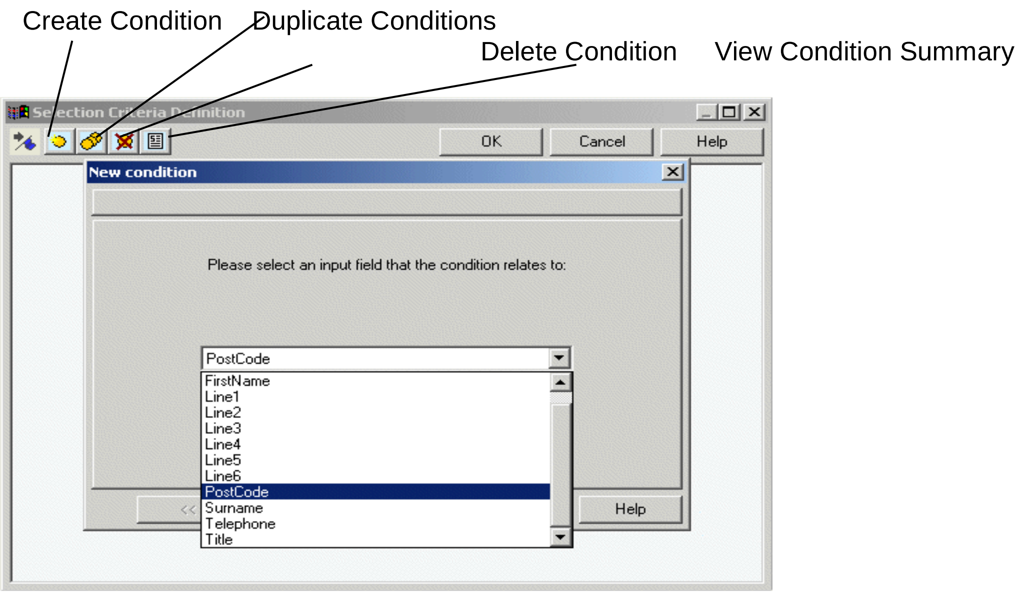
Here the SQI wizard will prompt you early on to enter a logical prefix for the SQI operation. Entering a logical prefix will make it easier to access and edit the existing conditions at a later stage

Setting Selection Criteria for Queuing

The ***Selection Criteria*** option allows you to specify which records to queue, setting a range of conditions. To queue all records skip this step and move to the Next> page.



Clicking the ***Selection Criteria*** button will open the *Selection Criteria Definition* screen. It consists of a work area, also called “the canvas”, where coloured discs will represent the different conditions.



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

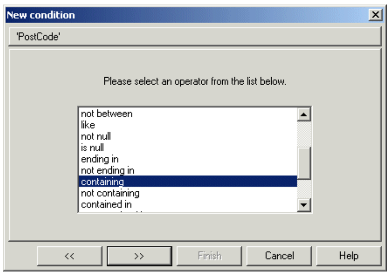
 **Duplicate condition.** Click this icon, to duplicate an existing condition.

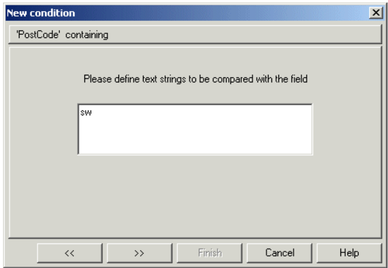
 **Delete a condition.** Click on the disc that you wish to delete, and then on the ‘Delete condition’ icon.

 **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**.

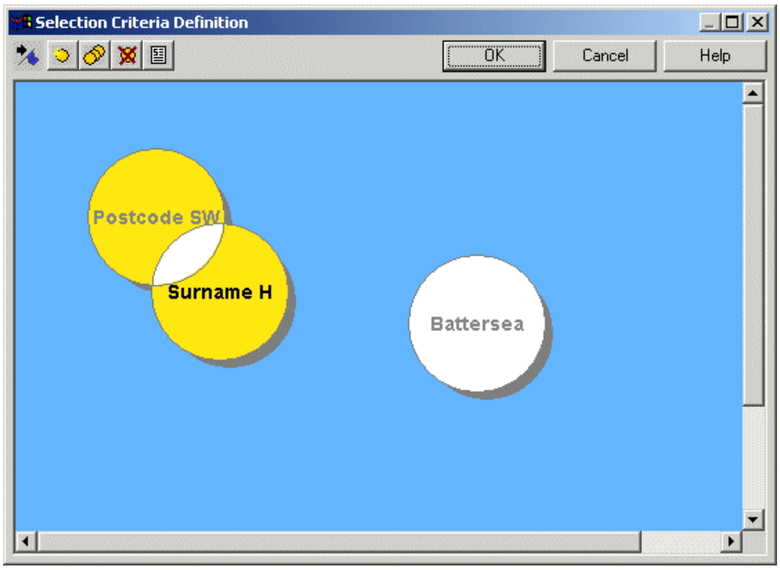




We are then prompted to enter a name for our condition, i.e. Postcode **SW**.

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:

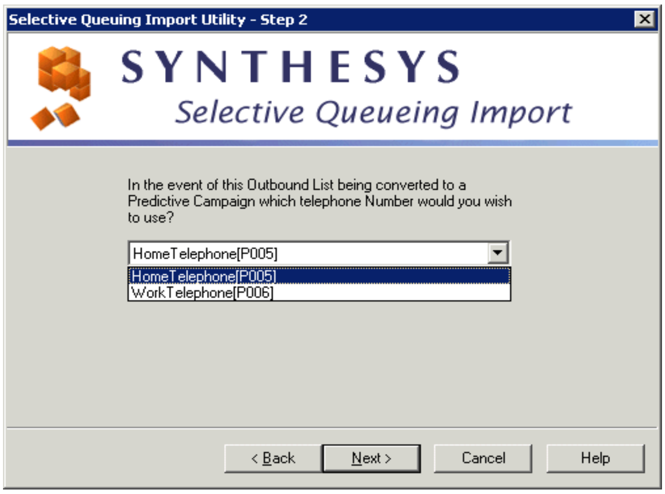
(Postcode SW **AND** Surname begins with H) **OR** (Borough = Battersea)

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

Selecting the Telephone Number

In the window now displayed:

- Select the telephone number to be dialled, in the event of the campaign being turned into a Predictive Outbound List.

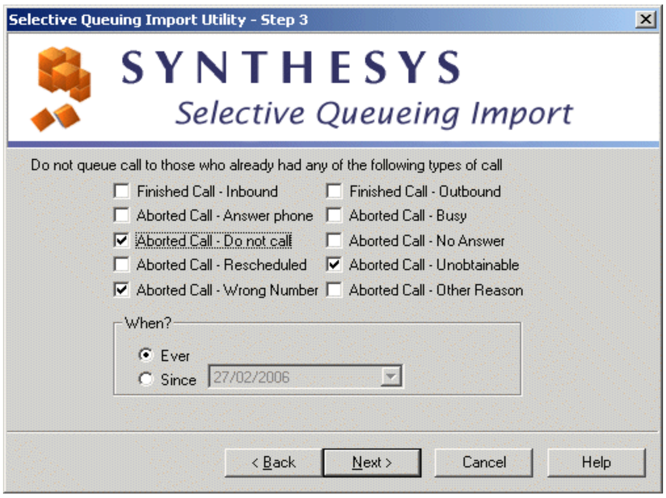


Queuing Customer Records

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.

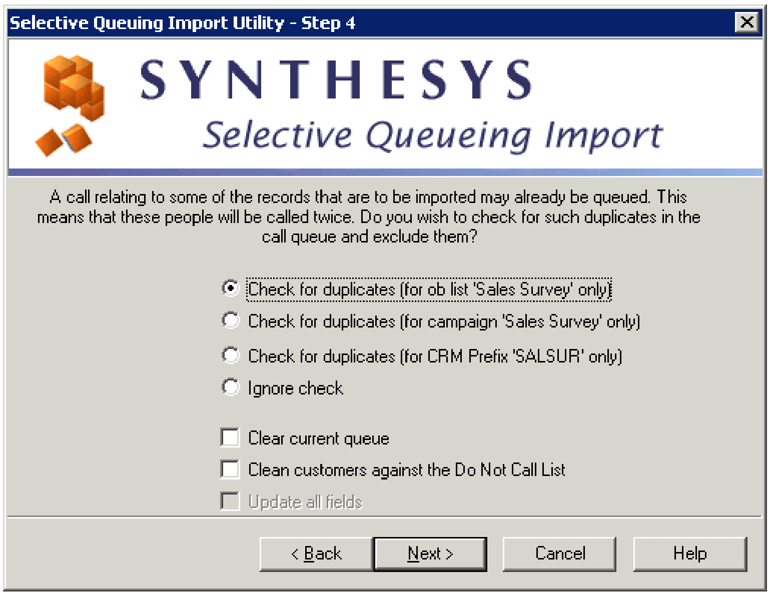
To ***exclude*** customers from the call queue:

- Place a tick into the boxes of the call outcomes to be excluded, selecting a date if required.



To check for possible duplicates in the queuing process:

- Click ***Check for duplicates*** to ensure that no call is already queued for this person.



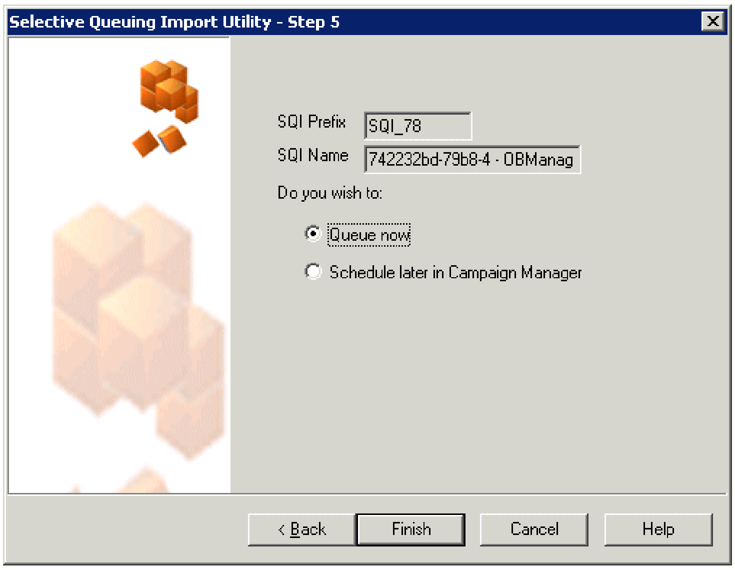
Update all fields is only available for the 'Import & Queue' option.

Select Option	***Description***
Check for duplicates (for ob campaign 'OB Campaign 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 call list of 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	Is activated for Import & Queue option only. Tick to update all fields within your CRM but 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.

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

- Queue now
- Schedule later in 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,** if you wish to queue the customers at a later stage, running a SQI report.

Schedule later in Campaign Manager

When you select the Schedule later in Campaign Manager option, the ***SQI Name*** field is activated and you can replace the default SQI name with a more user-friendly SQI name, as required.

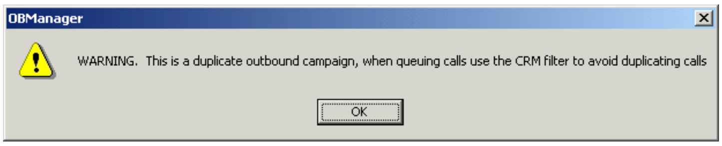
To schedule a SQI report later in the Campaign Manager, make a note of the SQI name entered, or copy it, as you will need the SQI name, when setting up your SQI report.

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

Queuing Customers for a Second Outbound List

If you are setting set up more than one Outbound list for a callflow, a message will be displayed informing you that this is a duplicate Outbound list.

It is advisable to use the *CRM Filter* (using the 'Queuing Customers Based On Selected Conditions' option) when queuing customers to avoid duplicating calls.



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

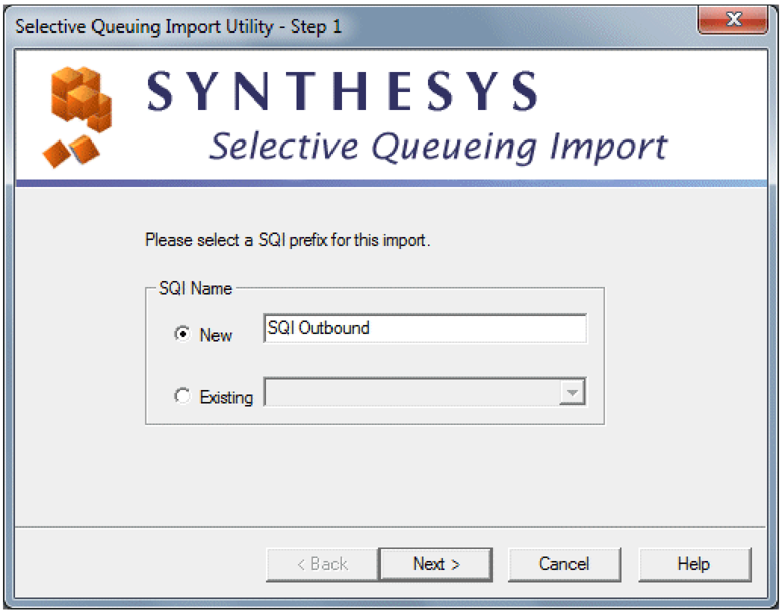
- Go to ***Outbound*** under the **Setup** heading of the Synthesys main screen to open the *Synthesys Outbound Manager*.
- Select the required Outbound list and go to **Edit** on the menu bar.
- Select Queue calls using Selective Queuing Import to open the SQI Wizard.

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.



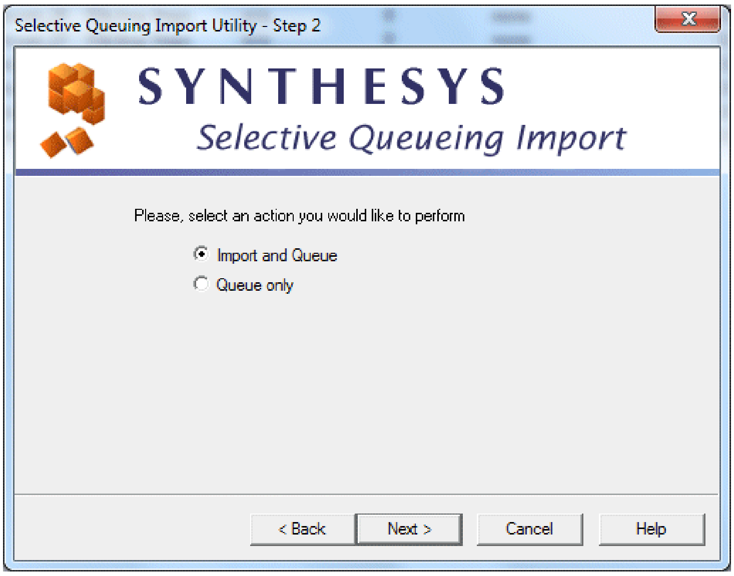
Click Next> to continue to the next page of the wizard.

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

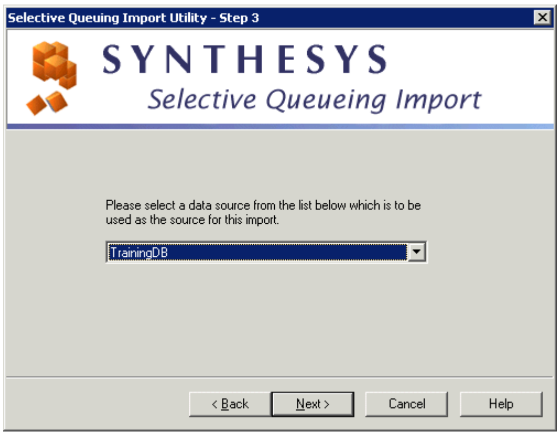
To queue customers from an external data source, use the 'Import and Queue' option, to import the customers into the CRM first, before they can be queued. If the customer records are already in the CRM, you can use the 'Queue only' option.



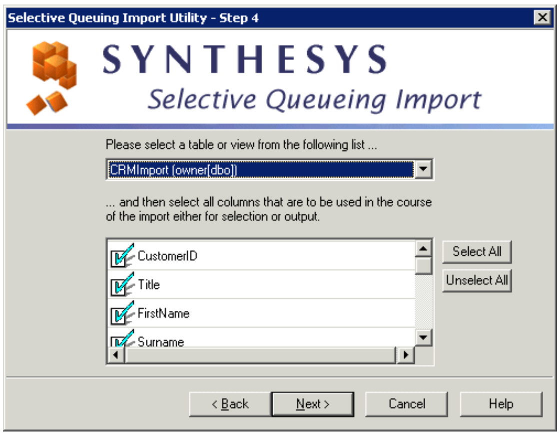
Click Next> to continue to the next page of the wizard, where you select the required data source, database table and columns.

Part 1: Input – Data Source & Table Columns

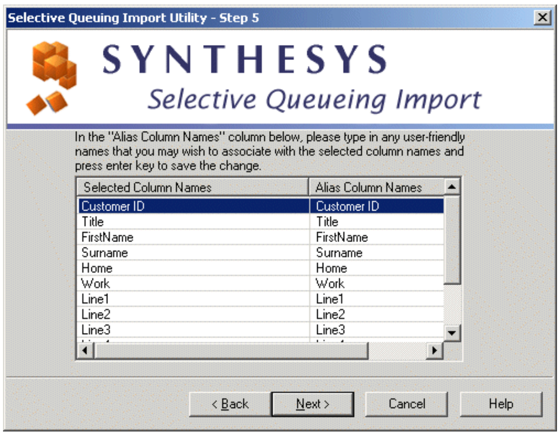
You now need to select the database that contains the table with the data to be imported from the list of ODBC data sources available on the system.



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.



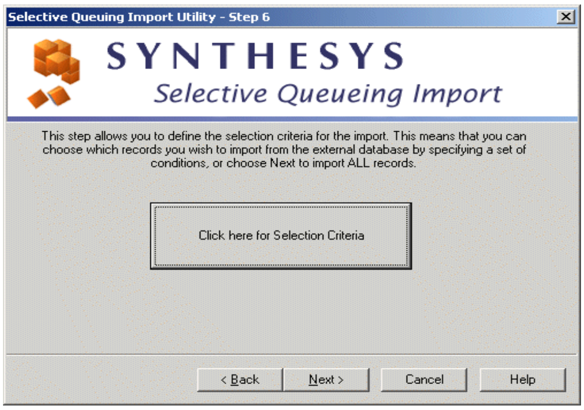
The first column contains the selected column names.

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.

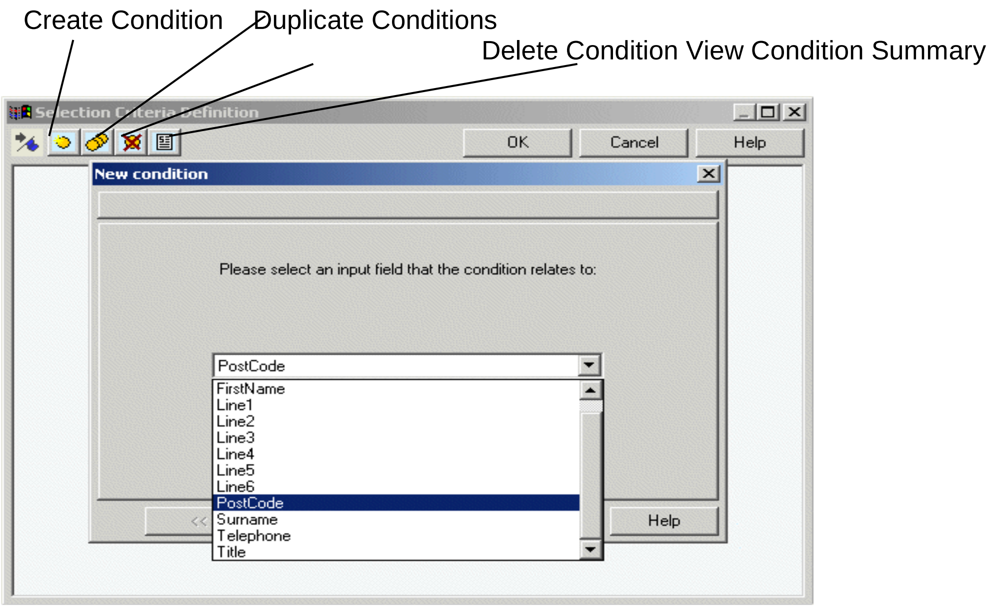
Press ENTER each time, to save any name changes made in the Alias column.

Part 2: Import Selection Criteria

The ***Import Selection Criteria*** allows you to choose which records to import, specifying a set of conditions. To import all records, skip this step by clicking Next>.



Clicking the **Selection Criteria** button will open the Selection Criteria Definition screen. It 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 e**dit** existing **conditions**, double-click on the relevant condition disc.

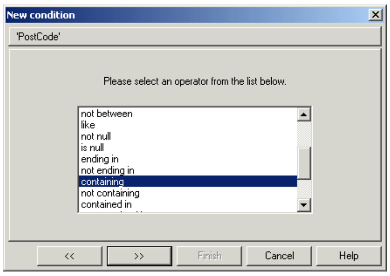
 '**Duplicate condition'.** Click this icon, to duplicate an existing condition.

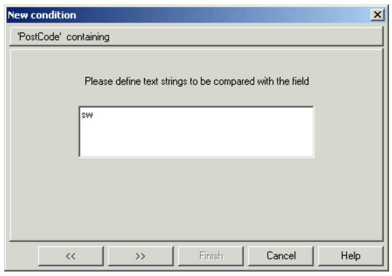
 **'Delete a condition'.** Click on the disc that you wish to delete, and then on the 'Delete condition' icon.

 **'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**.

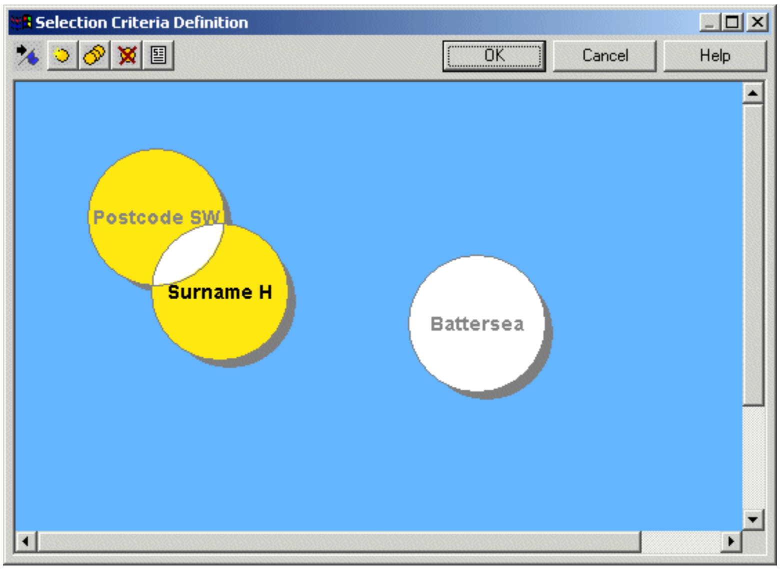




We are then prompted to enter a name for our condition, i.e. Postcode **SW**.

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)

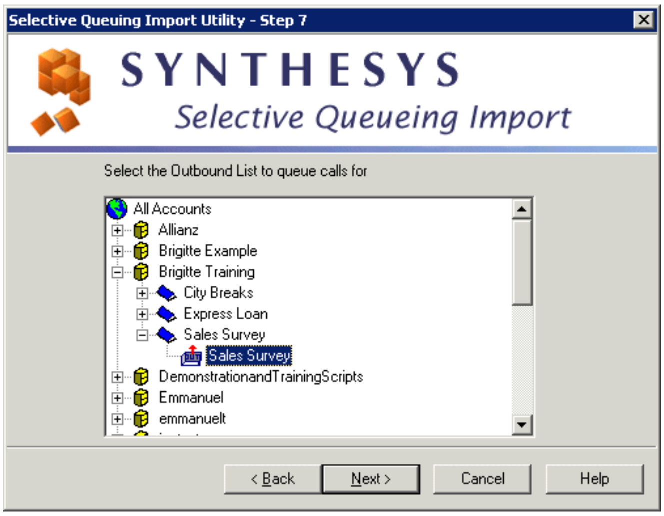
Click OK to return to Step 1 of the wizard and proceed to the next step.

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.

- 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.



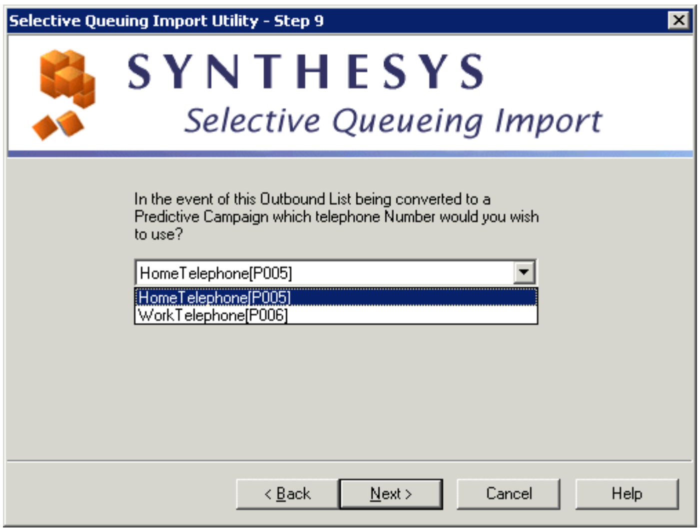
The next step involves assigning values to the destination fields.

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

- Click on the required field in the Source column and select the required field from the drop down menu.

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 to be used should the campaign be turned into a predictive outbound list.



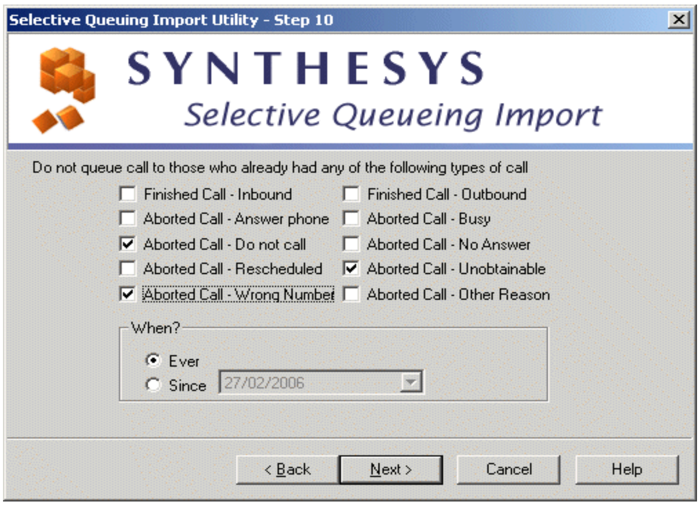
Part 4: Queuing Customer Records

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

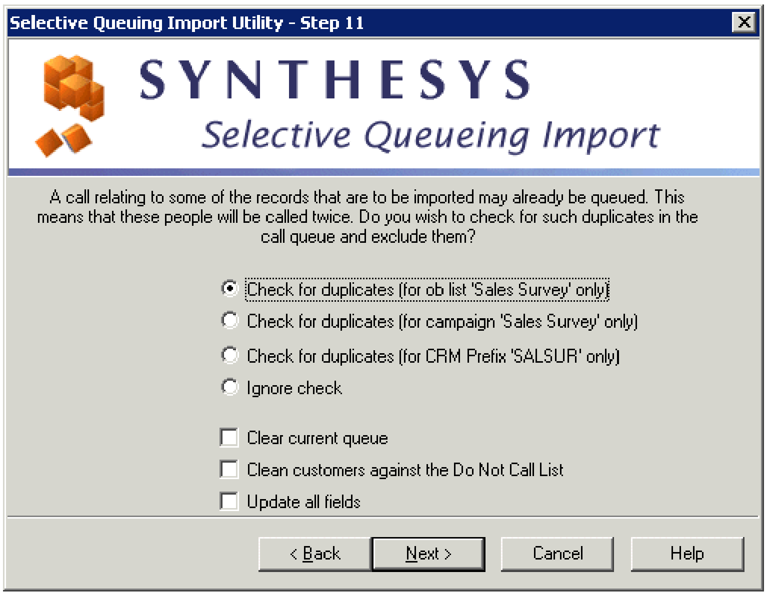
In this part of the wizard you can define restrictions to be imposed when queuing calls, based on previous contact with a specific customer.

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, to check that no call is already queued for this person.



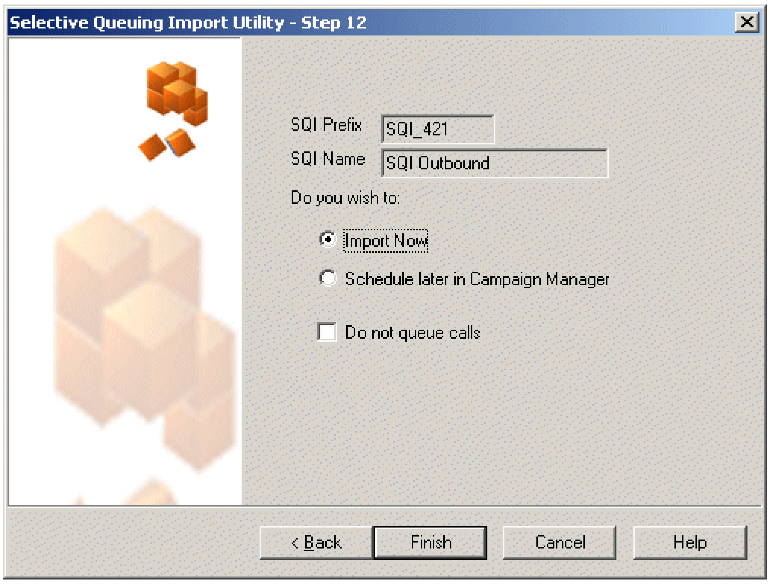
Do NOT tick the ‘Update all fields’ box, if you only wish to update some of the selected CRM fields.

Select Option	***Description***
Check for duplicates (for ob campaign ‘OB Campaign 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 call list of 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.

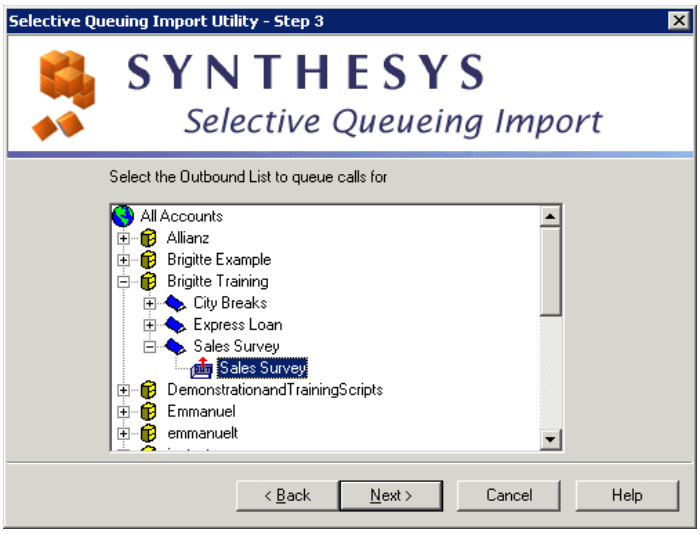
If you select an existing SQI name, the Import and Queue or Queue Only option in Step 2 of the wizard will be greyed out, as the type of import action associated with the selected SQI name has already been selected.

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 must use the ‘Import and Queue’ option

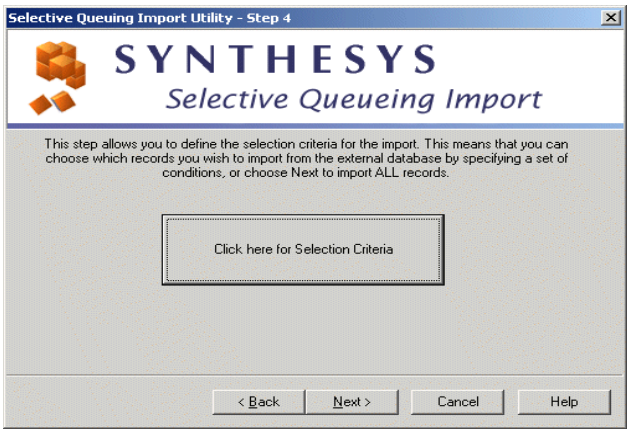
Part 2: Selection of Outbound List

You now need to select the Outbound list, for which you want to queue the customer records, before moving to the Next> page of the wizard.

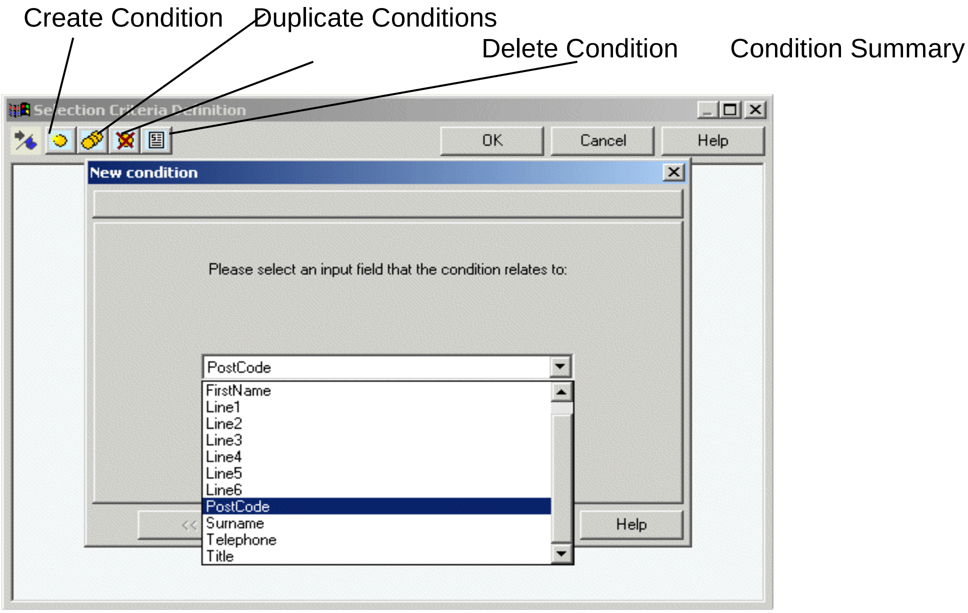


Part 3: Set Selection Criteria for Queuing

The ***Selection Criteria*** allows you to choose which records to queue, specifying a set of conditions. If you wish to queue all records, skip this step, clicking Next>.



Clicking the **Selection Criteria** button will open the *Selection Criteria Definition* screen. It consists of a work area, also called “the canvas”, where coloured discs will represent the different conditions.

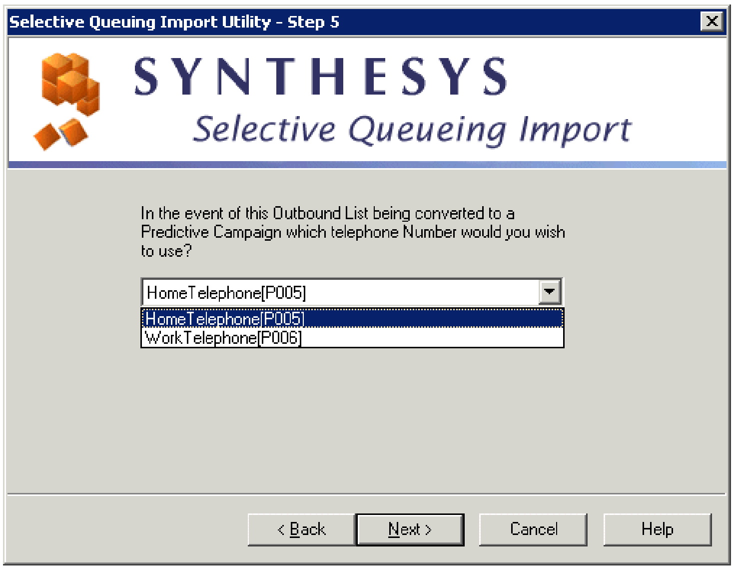


To create a new condition, click the **‘Create Condition’**  icon. In the ‘New Condition’ window, select the property according to which you want to define your search. You can use any field that is available in your CRM (in our example we have selected ‘Postcode’).

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

Click OK and the 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.



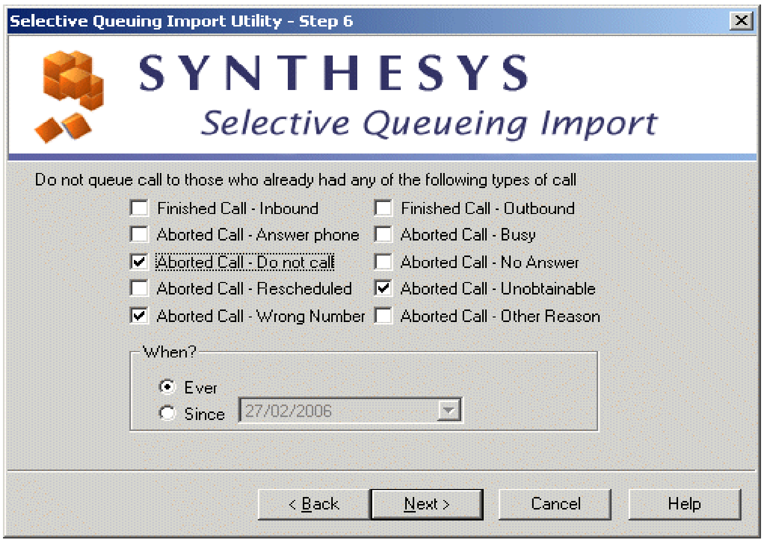
Part 4: Queuing Customer Records

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

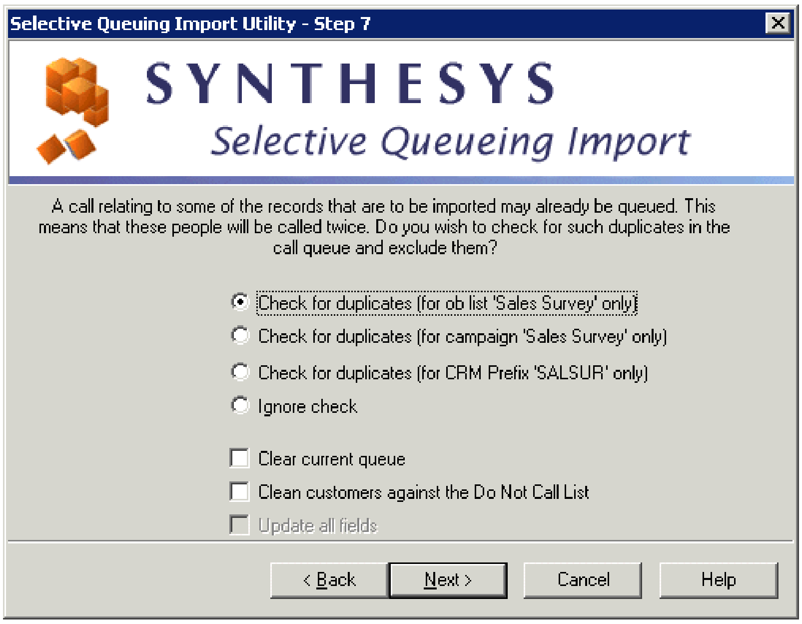
Here you can define restrictions to be imposed when queuing calls, based on previous contact with a specific customer.

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.

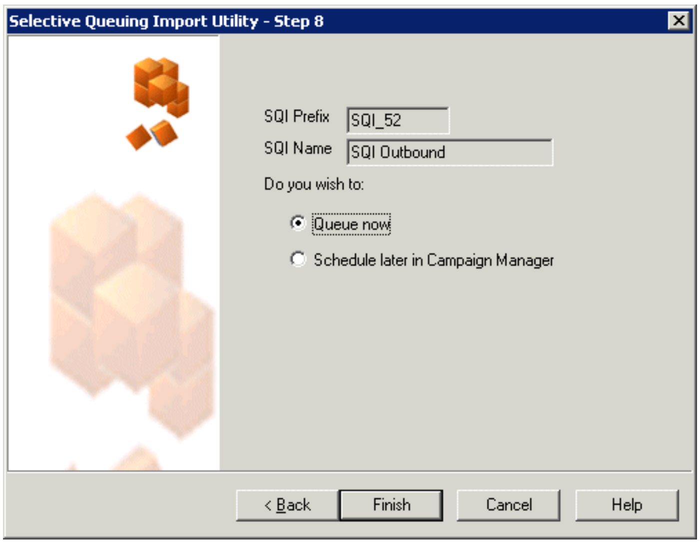


Update all fields is only enabled for the Import & Queue option.

Select Option	***Description***
Check for duplicates (for ob campaign ‘OB Campaign 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 call list of 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	Activated for Import & Queue option only. 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'



- 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

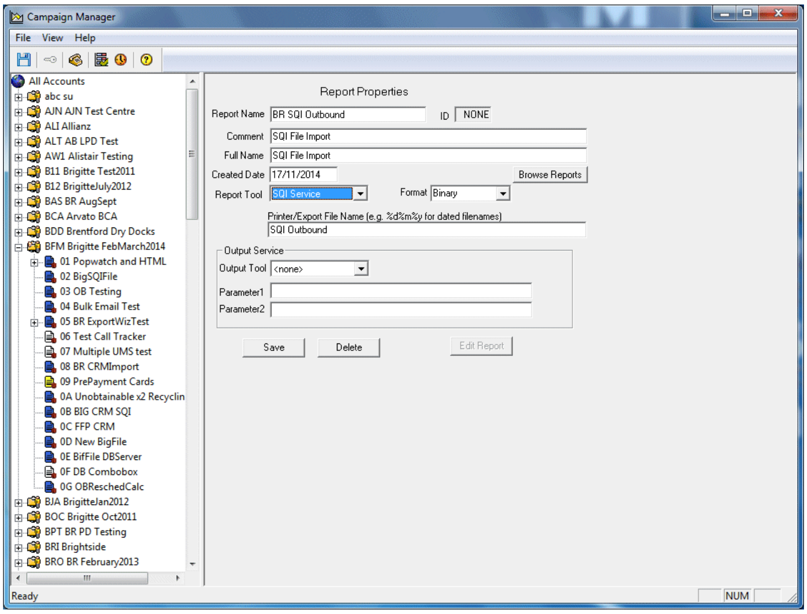
To set up a SQI report and schedule in the *Campaign Manager*:

- Go to ***Reports*** under the **Setup** heading of the Synthesys main screen to open the Synthesys Campaign Manager.

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.

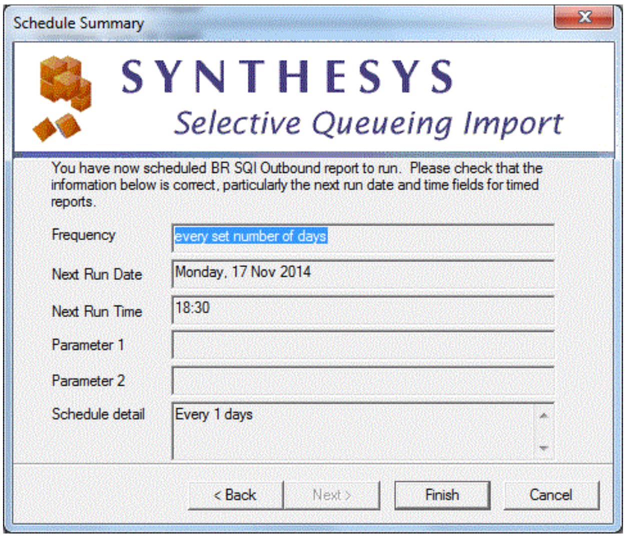


Scheduling a SQI Report

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.

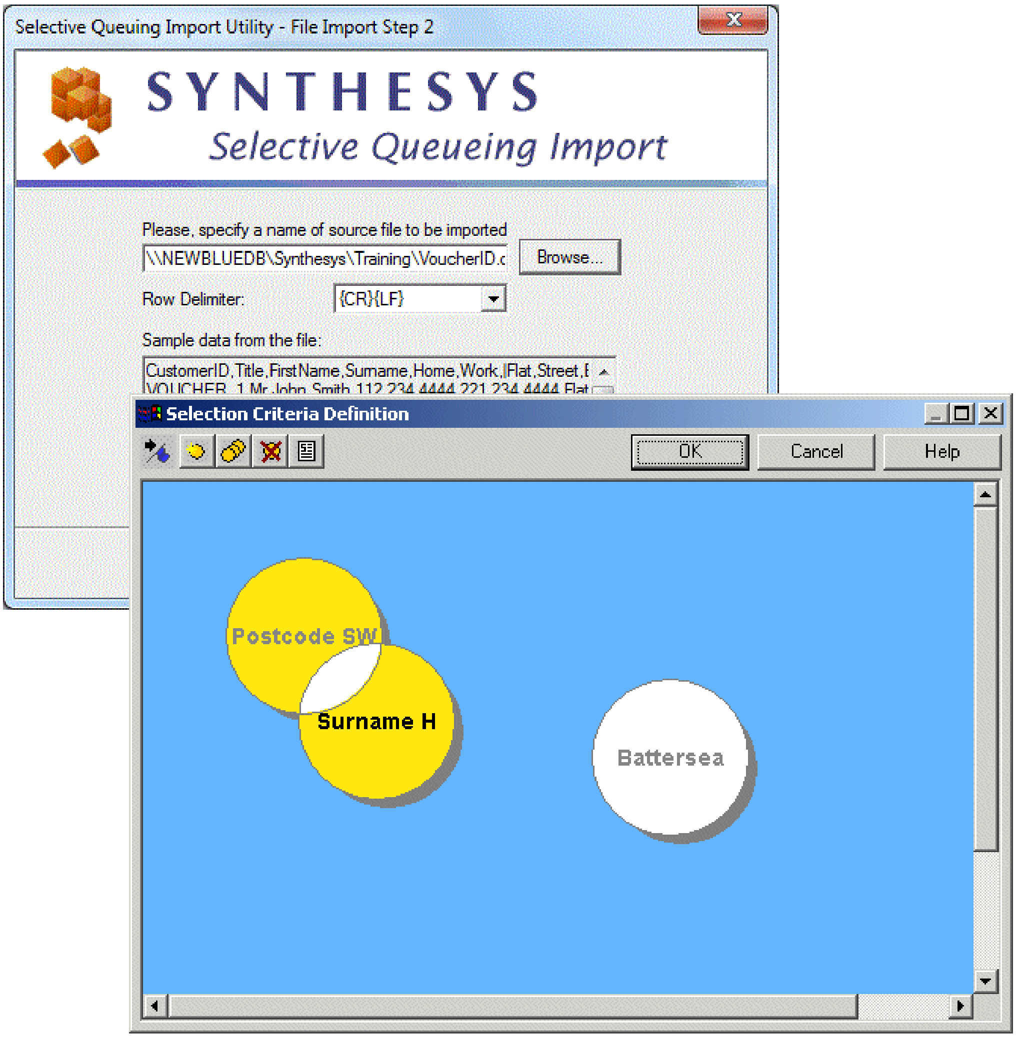


To check that your SQI report has run successfully:

- 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 he ***Reports*** *manual.*

Selective Queuing File Import "SQI"



SELECTIVE QUEUING FILE IMPORT ("SQI")

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.

SELECTIVE QUEUING FILE IMPORT (“SQI”)

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

- Go to ***Outbound*** under the **Setup** heading of the Synthesys main screen to 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

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

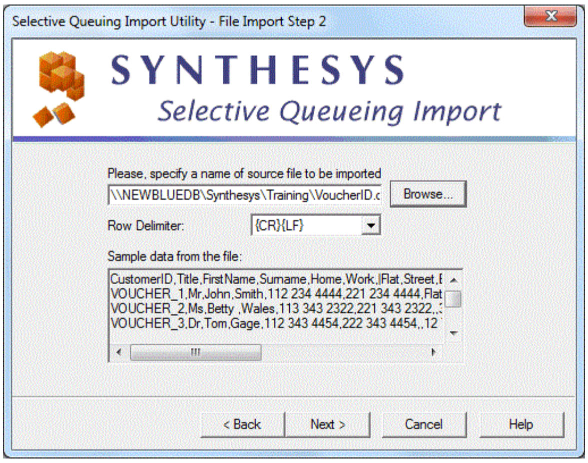
Selecting the Data File

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.

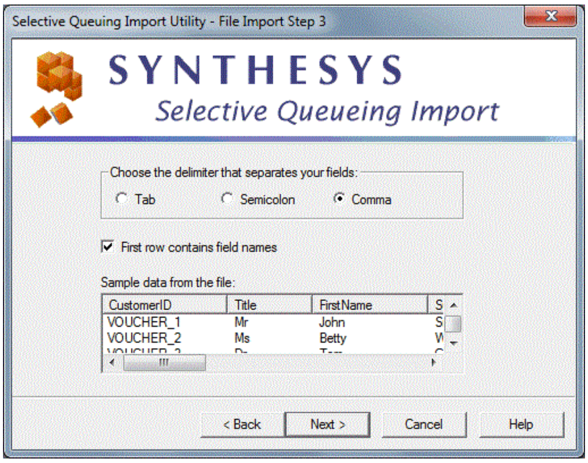
Step 2: The next step involves the selection of the source file. Click the Browse button, to select the file, choose a *Row Delimiter* if required and view the data that you are about to import.

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 for the File that you import, tick the ‘***First row contains field name’*** box.

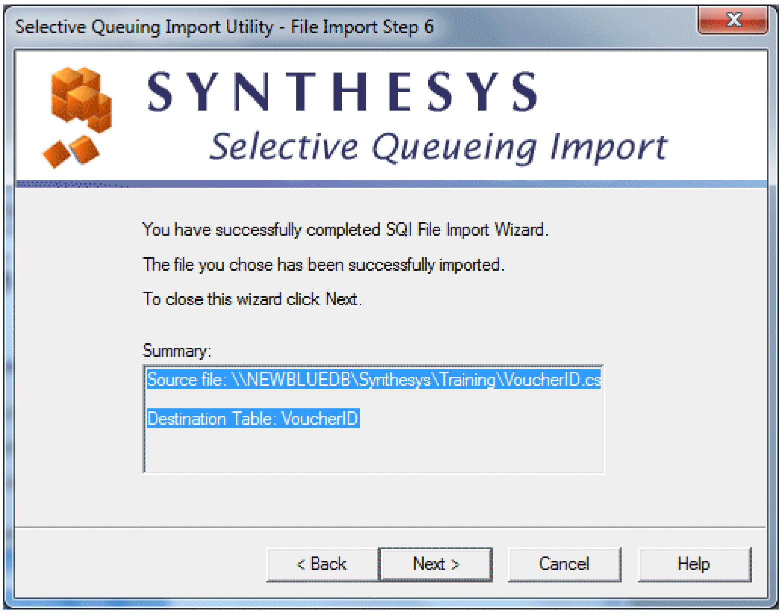


Creating a Temporary Data Import Table

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.



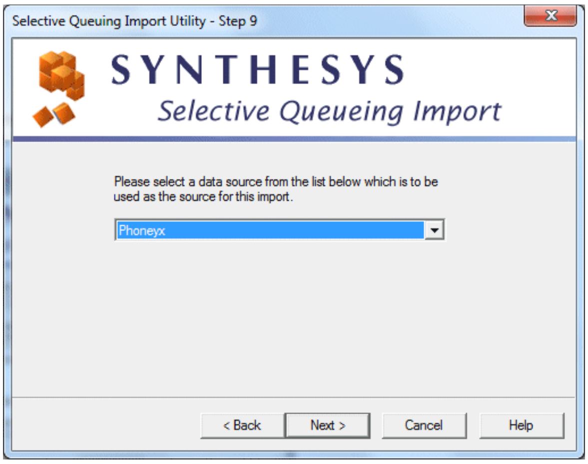
Data Source and Table Columns

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 SQI report, select the Database with the temporary table that you have created and specify the columns to be used in the import.

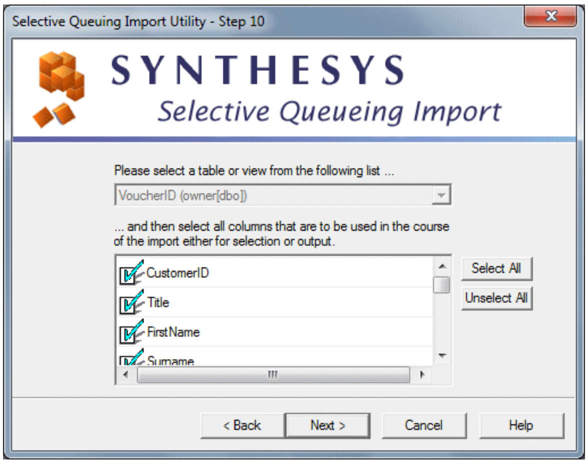
Step 7: Enter a **new name** for your SQI import **or** select an **existing SQI name** from the drop down menu.

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 SQI import has already been selected, i.e. Import and Queue.

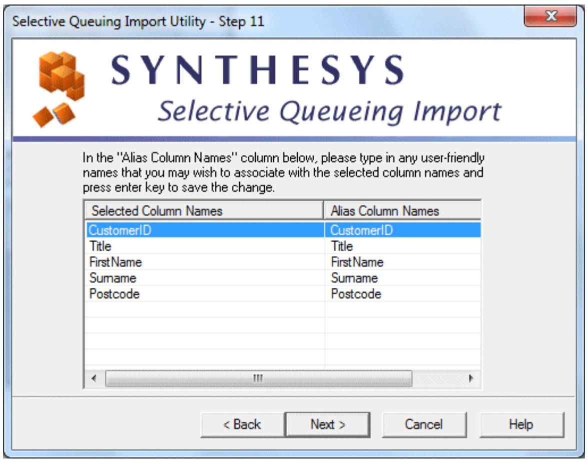
Step 9: Now, select the required data source from the list of ODBC data sources available on the system. You need to select **Phoenix**, as this is the location of the temporary table that you have created.



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.



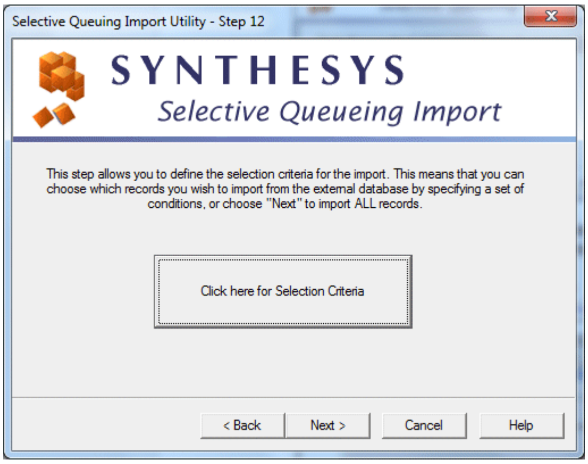
To change the name displayed in the Alias column, click into the field and type in the user-friendly name.

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

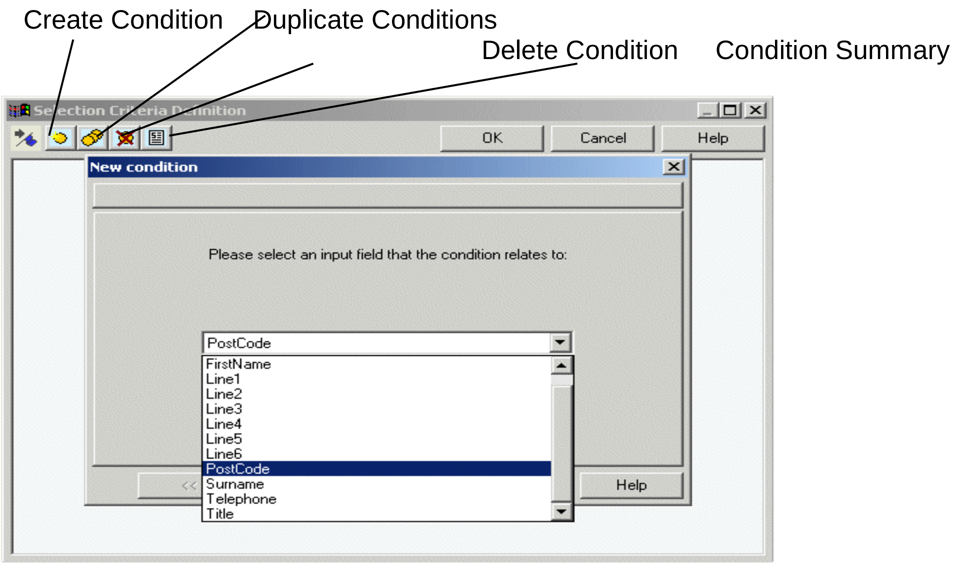
Part 2: Defining Import Selection Criteria

The ***Import Selection Criteria*** allows 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> button.

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 e**dit** existing **conditions**, double-click on the relevant condition disc.

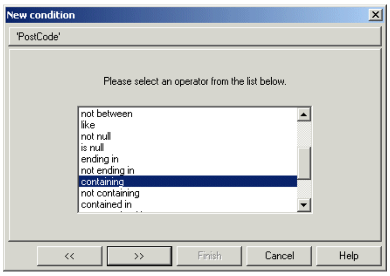
 '**Duplicate condition'.** Click this icon, to duplicate an existing condition.

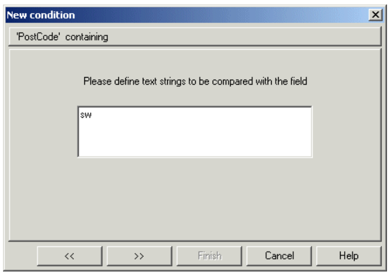
 **'Delete a condition'.** Click on the disc that you wish to delete, and then on the 'Delete condition' icon.

 **'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**.

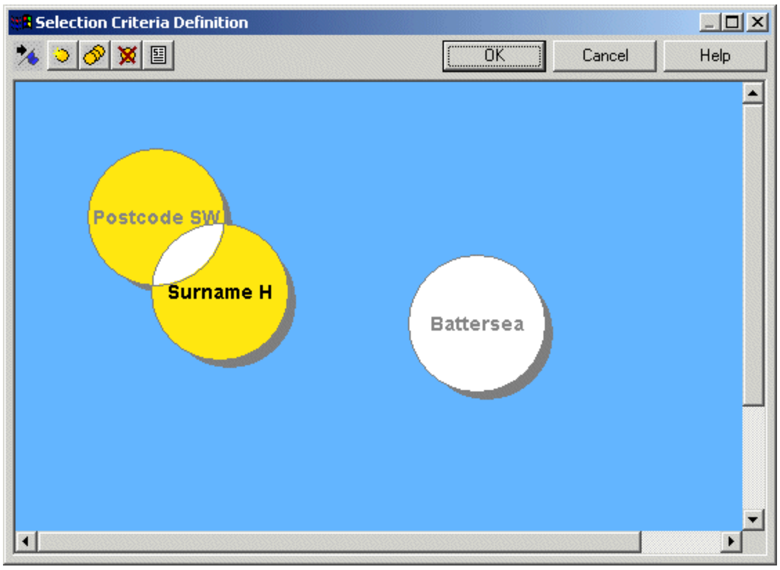




We are then prompted to enter a name for our condition, i.e. Postcode **SW**.

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)

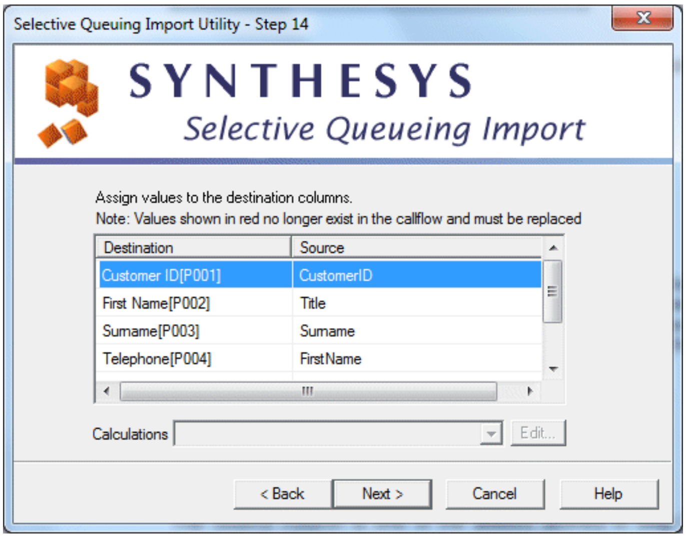
Click OK, and proceed to the next step.

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.

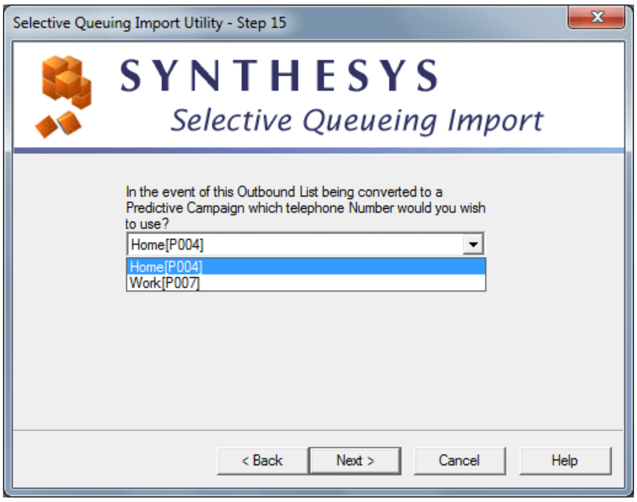
The Source column is one of the aliases defined in step 11 (Part1); the Destination column is the CRM table.

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.

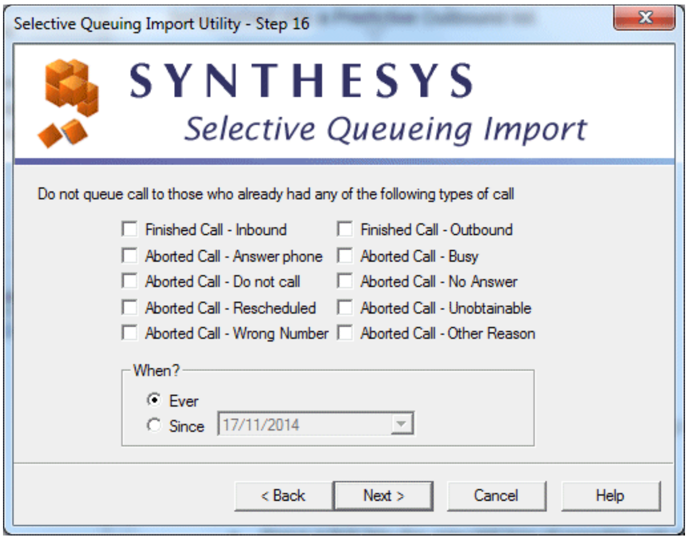
Step 15: If your CRM contains more than one telephone number, select the telephone number that is to be queued and dialled first, in the event of the campaign being turned into a Predictive Outbound list.



Step 16: Defining restrictions to be imposed when queuing calls, based on previous contact with a specific customer.

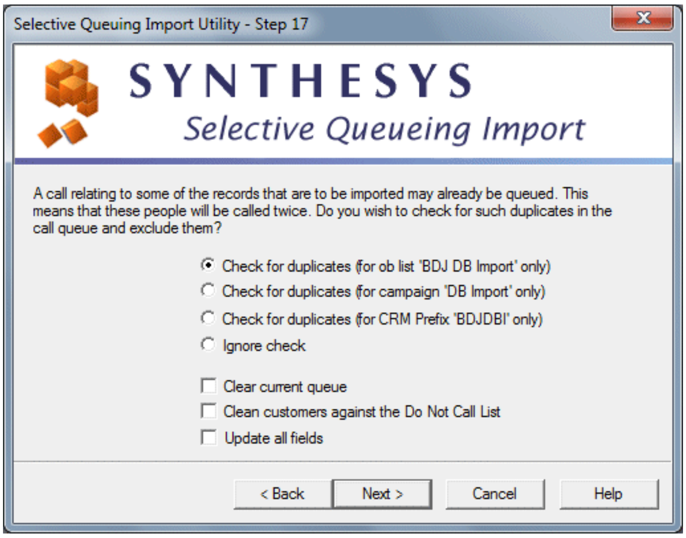
To ***Exclude*** customers from the call queue:

- 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.

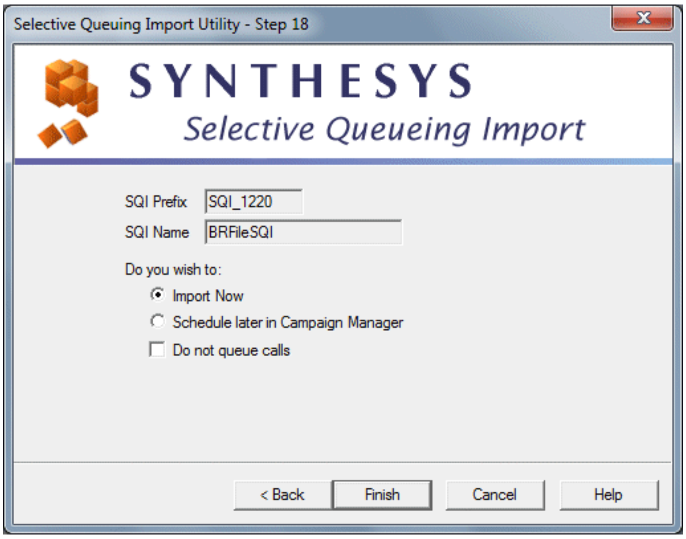


Do <u>NOT</u> tick the 'Update all fields' box, if you only wish to update some of the selected CRM fields.

Select Option	***Description***
Check for duplicates (for ob campaign 'OB Campaign 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 call list of 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.

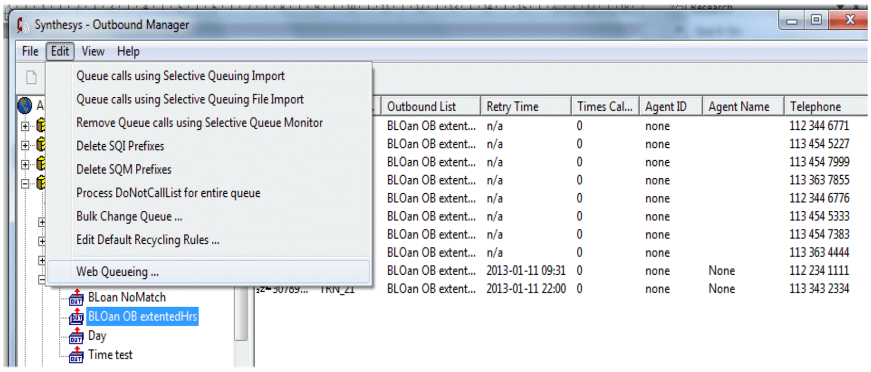
- Tick **Import now** to queue the customers immediately. The queue process will start in the background and after a short while all relevant calls will be displayed. To refresh the Outbound Manager, press the F5 key.
- Tick **Schedule later in Campaign Manager** to queue customers at a later stage, 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

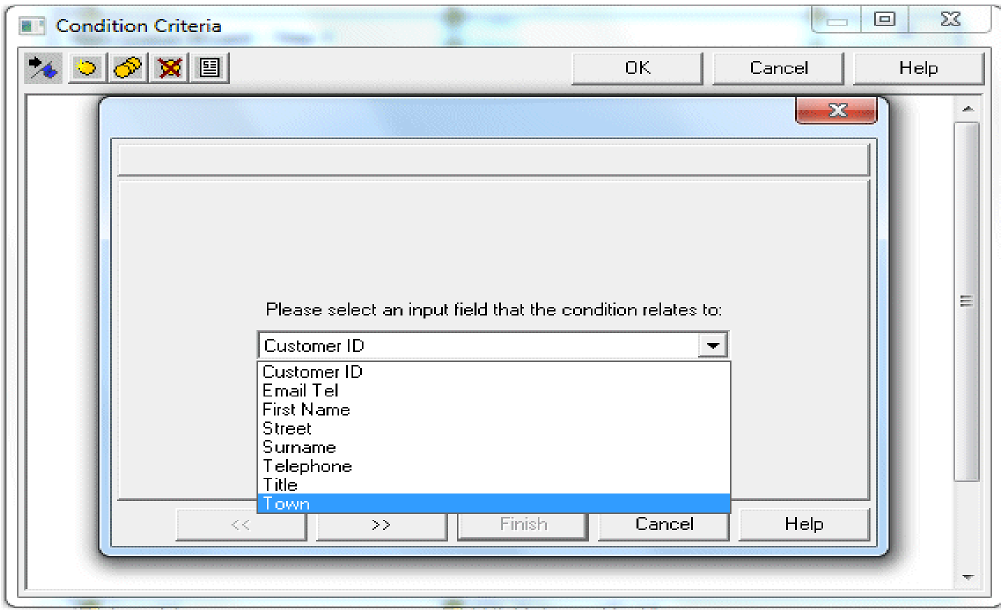
If you tick the Schedule later in Campaign Manager *option, make a note of the SQI name entered, or copy it, as you will need the SQI name, when setting up your SQI report and schedule.*

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

Web Queuing

The Web Queue Wizard





WEB QUEUING – THE WEB QUEUE WIZARD

Introduction

The Web Queue wizard enables users to specify queuing conditions based on CRM data to determine into which outbound list incoming web leads are to be placed.

The Web Queue wizard is used in conjunction with the **CRM Web Service,** the **Rules Engine Web Service** and the **Dialler Web Service**.

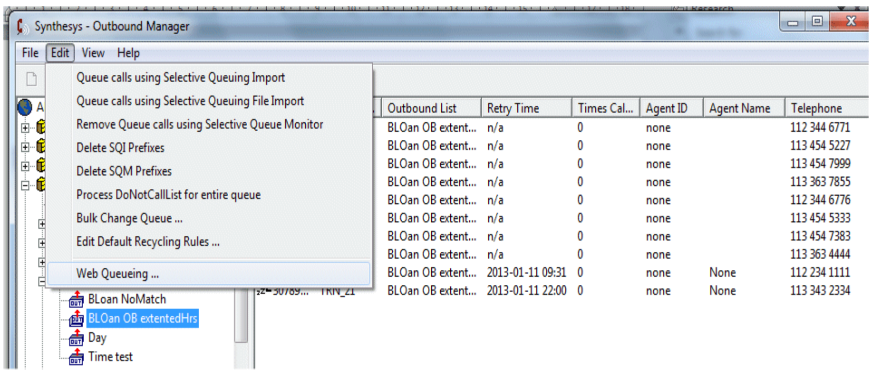
This allows the client technical team to set up a Web Service call that never changes, but then gives the Call Centre the ability to direct these incoming web leads into different outbound campaign lists based on a set of CRM criteria that can be changed, as required.

- In the **Web Queue wizard** users create different web queue prefixes, each containing associated queuing criteria based on CRM data, and the outbound list to be used in the queuing process.
- Incoming customer leads from a web site are added to the CRM via the **CRM Web Service**.
- The **Rules Engine Web Service** then uses the web queue prefix and associated criteria to direct these leads into the appropriate outbound lists.

The Web Queue Wizard

Web queue prefixes to specify queuing criteria and outbound lists are created via the **Web Queuing** option in the **Synthesys Outbound Manager.**

- Open the *Synthesys Outbound Manager*.
- Select the Outbound list required and go to **Edit** on the menu bar.
- Select ***Web Queuing*** to open the *Web Queue* wizard.



Noetica

Step 1: Entering or selecting a Web Queue name

The first page of the Web Queue (WQ) wizard will prompt you to

- enter a name for a new WQ prefix into the **New** field, or to
- select **Existing** to edit a WQ prefix that already exists.

Step 2: Selecting Outbound list for lead

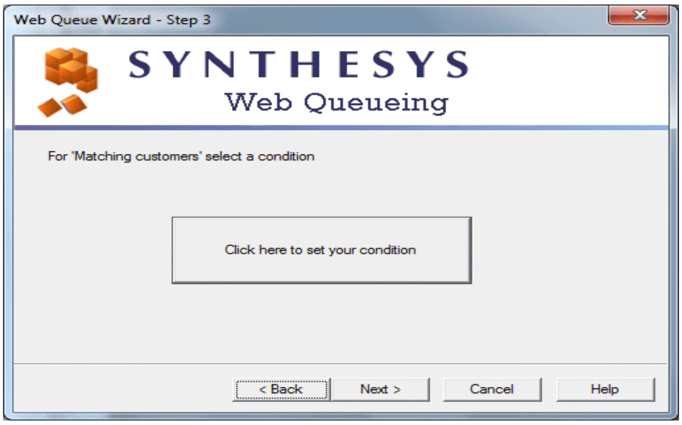
In the next page of the wizard

- Select the Outbound list into which to put the lead if the criteria set is met.

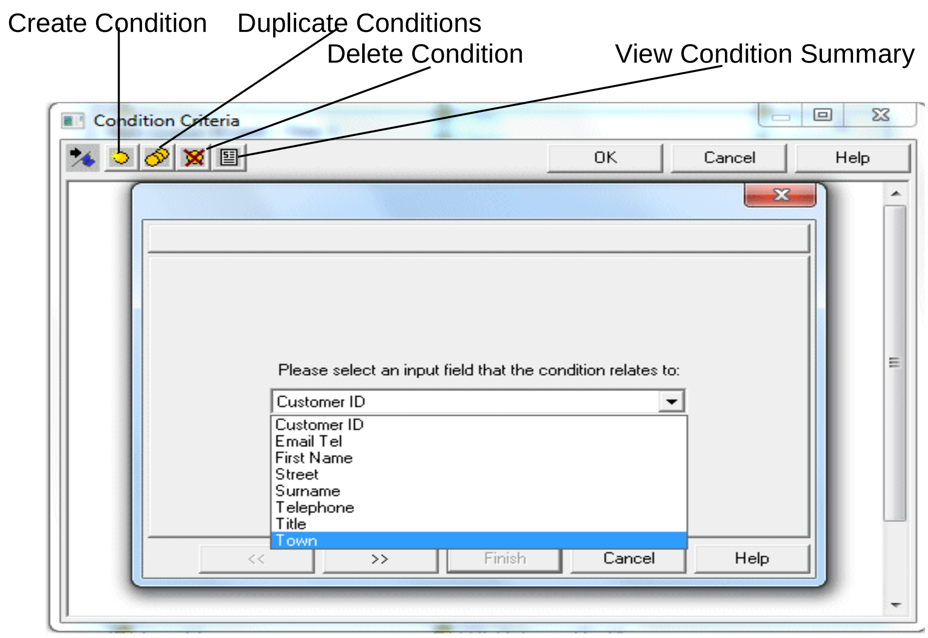
Step 3: Setting criteria based on CRM data

In page 3 of the WQ wizard, specify the conditions that are required to place a customer record into the selected outbound list.

- Press the **Click here to set your condition** button to open the *Condition Criteria* screen.



The *Condition Criteria* screen consists of a work area, also called “the canvas”, where coloured discs represent the different conditions.



 **‘Create Condition’:** Create a new condition. To e**dit** existing **conditions**, double-click on the relevant condition disc.

 ‘**Duplicate condition’:** Duplicate an existing condition.

 **‘Delete a condition’:** Select the disc that you wish to delete, then click the ‘Delete condition’ icon.

 **‘View condition summary’:** View a summary of available conditions.

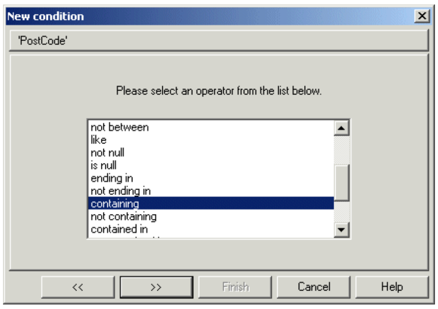
To create a new condition:

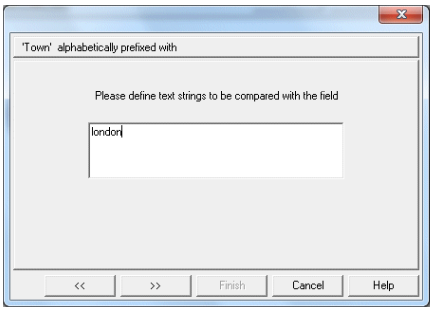
- Click the **Create Condition**  icon.

- In the ***New Condition*** window, select the property to define your search using available CRM fields, for example the ***Town*** field.

- Click the 

button to move to the next wizard screen and select the required operator, i.e. **containing** and then type **London** to specify the name of town in your criteria.

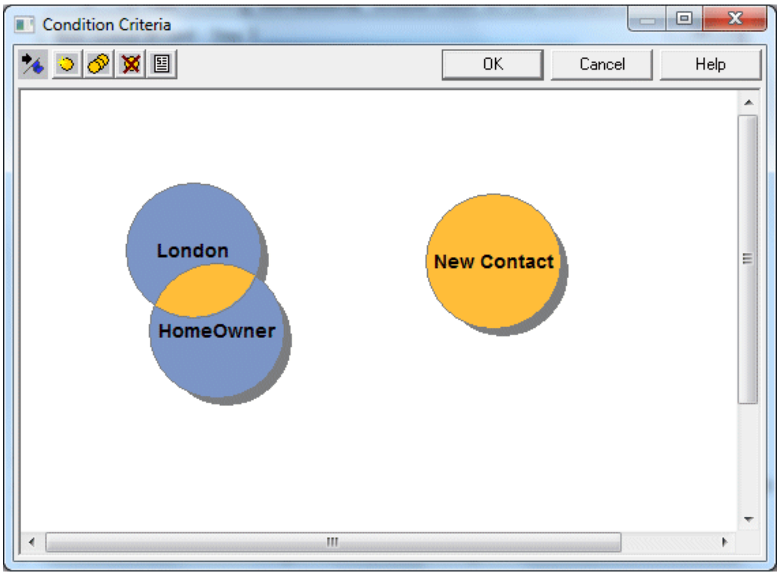




You are then prompted to enter a logical name for the criteria i.e. *London,* which will be displayed on the free floating disc on the canvas**.**

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

- To **edit** existing **conditions**, double-click on the relevant condition disc.



Each condition disc can be manipulated, clicking and dragging it around the canvas

If two discs are overlaid completely, press *Control* on the keyboard to drag them apart.

Any discs that ***overlap*** with one or more other discs will ***imply a Boolean 'AND'*** to operate between the conditions. In our example:

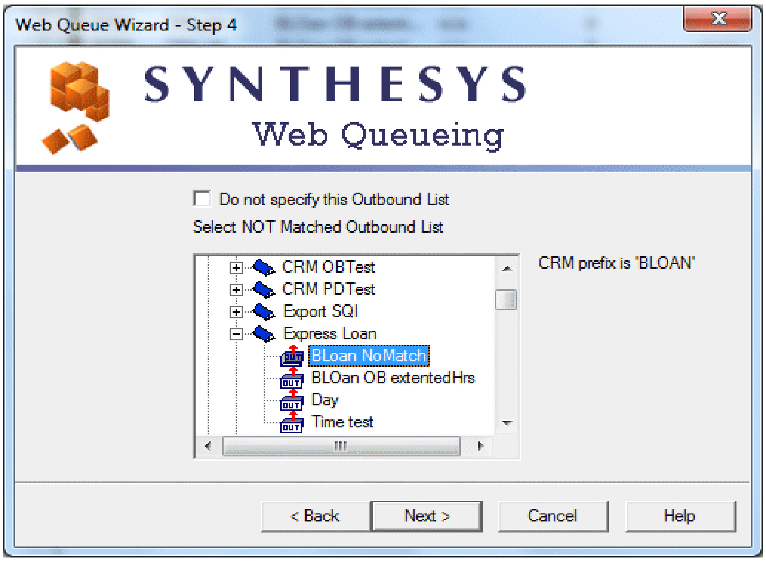
(London **AND** Home Owners) **OR** (New Contact).

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

Step 4: Outbound list to use if criteria is NOT met

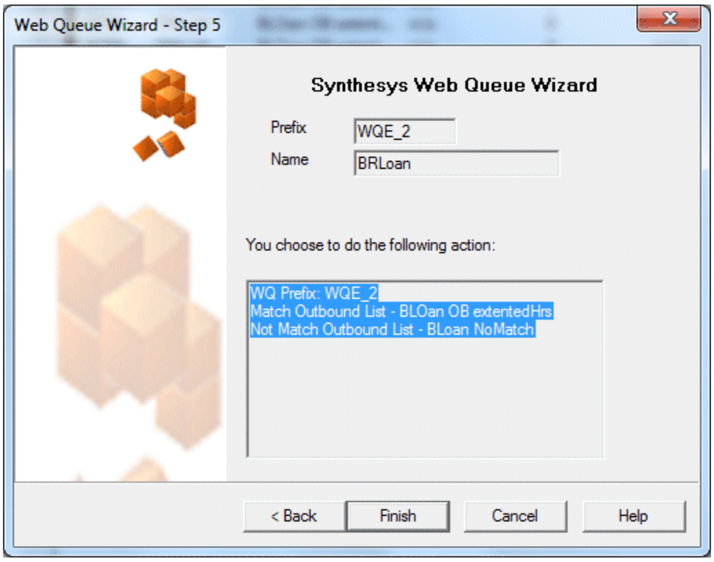
In step 4 of the Web Queue wizard

- Select the Outbound list that the calls will be queued into if the criteria is NOT met, or
- Tick *Do not specify the Outbound List*, if you don't wish to queue the leads that do not match the set criteria.



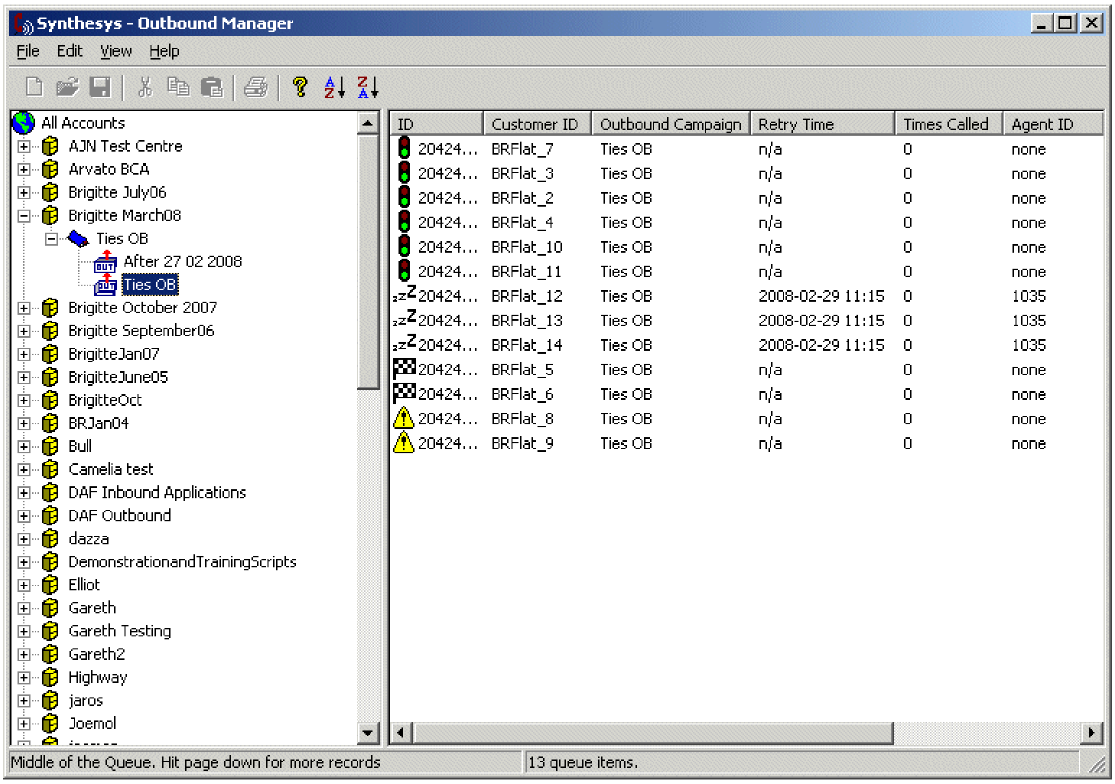
Step 5: Saving the Web Queue prefix

The last step of the Web Queue wizard show a summary of the criteria and the WQ **Prefix** that will be used by the ***Rules Web Service*** to direct incoming web leads to the appropriate outbound lists.



In our example the ***QueuingPrefix*** **parameter** is **<WQE_2>.**

VIEWING QUEUED CALLS

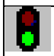
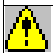
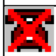
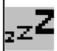
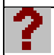
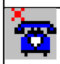
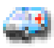


VIEWING QUEUED CALLS

To view the queued calls for an outbound list:

- Go to ***Outbound*** under the **Setup** heading of the Synthesys main screen to open the Synthesys Outbound Manager.
- Select the required outbound list to display all calls queued for this list in the window on the right, showing their current queue status.
- 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.

Explanation of Icons and Queue States

Icon	***Description***	***Queue State***
	Done: refers to outbound calls, which have been completed.	0
	Queued: a green light lists the active calls in the queue waiting to be taken; the red light lists the inactive / deactivated calls	1
	Rescheduled: refers to the number of scheduled calls to be taken at a specific time.	2
	Attention: shows the number of calls, which need the supervisor's attention because the customer to be called has not been reached.	3
	Never Call: lists all clients, which do not wish to be contacted.	4
	Running: shows the number of outbound calls in process.	5
	Sleeping: refers to calls waiting to be put back into the queue.	6
	Wrong Number: incorrect number associated with a client to be called.	9
	Unobtainable Number: if number is not obtainable.	10
	Predictive Call in progress / running	11
	Advanced Recycling strategy complete / done	12
	Emergency: To instigate instant callback	14
	Moved: Shows calls that have been moved to another OB list as part of advanced recycling rules, or using the ***Reschedule control*** to move a record between Outbound lists.	15

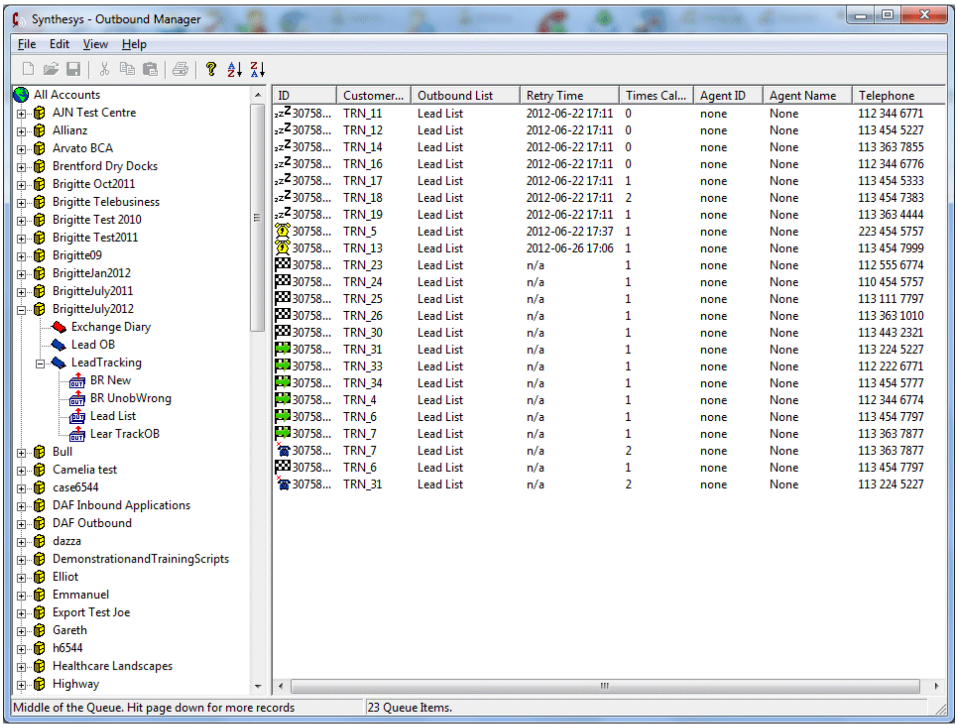
Lead Tracking

Lead Tracking allows users to follow leads in Synthesys providing a complete life cycle of the call, from the time it was queued, past various queue manipulation activities.

To distinguish between queued records moving to ‘Done’ because they are completed and ‘Done’ as a result of certain recycling events, a new queue state ‘Moved’ has been added.

The ***Moved***  queue state is displayed, if

- The ***Change Campaign*** option is used in the Advanced Recycling Designer to move a queued record to a different Outbound list
- A record *is* ***Re-queued*** as part of advanced recycling rules
- The ***Reschedule control*** is used to move a call between Outbound lists

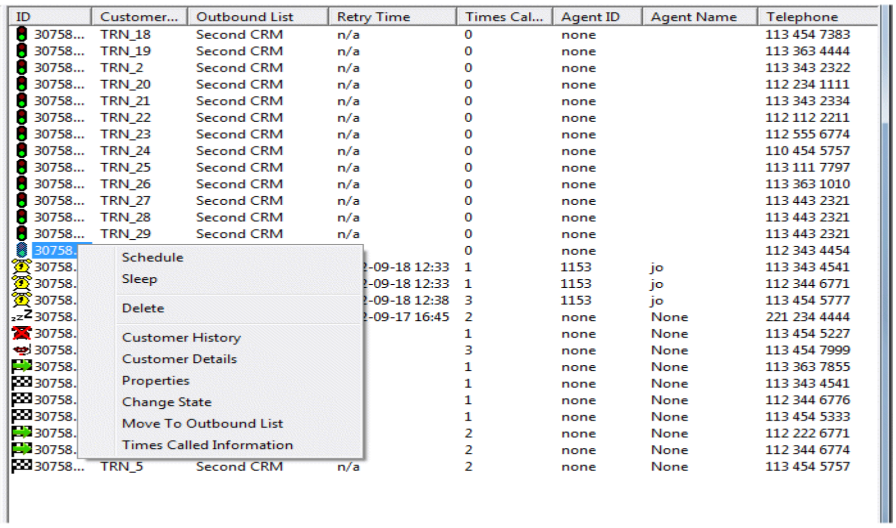


The two tables that support lead tracking are ***Phoenix_Lead*** (containing one row in phoenix_lead for each initial lead created in Synthesys) and ***Phoenix_Lead_Tracking*** (with a record for each queue instance).

Recycling events and queue states can be tied to dial events by linking records between phoenix_recycling and phoenix_statistics using the *ContactID* column.

Queue State

If you select and right click on a queued call, a range of options will be displayed, depending on the call outcome.

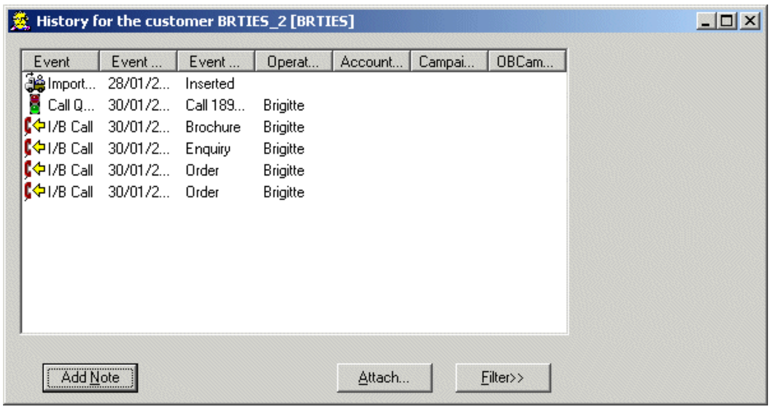


Select Option	To
Operator assign	Select a particular operator from the drop down list to take the outbound call for the selected customer, or remove the agent assignment by selecting **<De-assign Agent>**. Due Sleeping calls assigned to an operator will change to Reschedule state.
Schedule/Reschedule	Display the *Schedule Call* window where you can set the date and time frame in which the call should be taken.
Change the Call Time	Set a start and latest time to present sleeping calls. This will change the state of sleeping calls to reschedule.
Queue	Queue calls with a current state of not queued, for example, ‘Sleeping’ ‘Rescheduled’ or ‘Attention Supervisor’ etc.
Sleep	Set a waiting period, before the call is placed back into the queue for outbound calls to be taken.
Delete	Delete the highlighted customer from the queue.
Customer History	Display details of the caller’s previous contact with the company.
Customer Details	View details of the customer held in the CRM.
Properties	Display detailed information about a queued call.
Change State	Change the queue state, i.e. from ***Attention*** supervisor to ***Queued.***
Move to Outbound	Move calls from one Outbound list to another.
Times Called Information	Details about the number of times called for the selected **Queue ID**, **Lead ID** and **Customer record**.

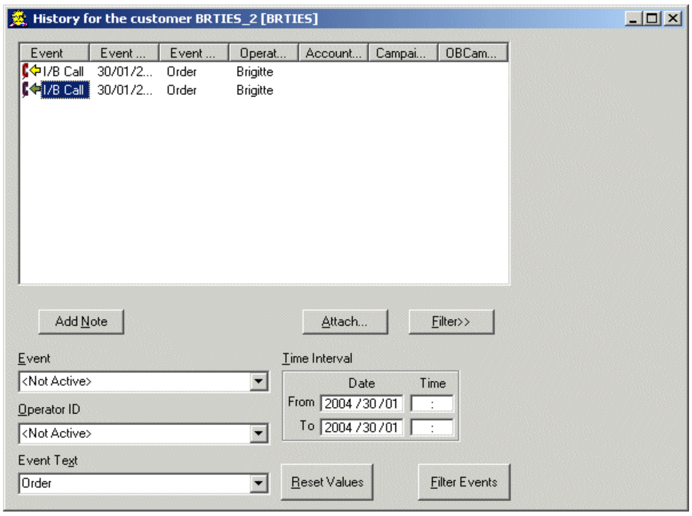
Customer History

To view details of a customer's previous contact with the company:

- Right click on a queued call and select ***Customer History***



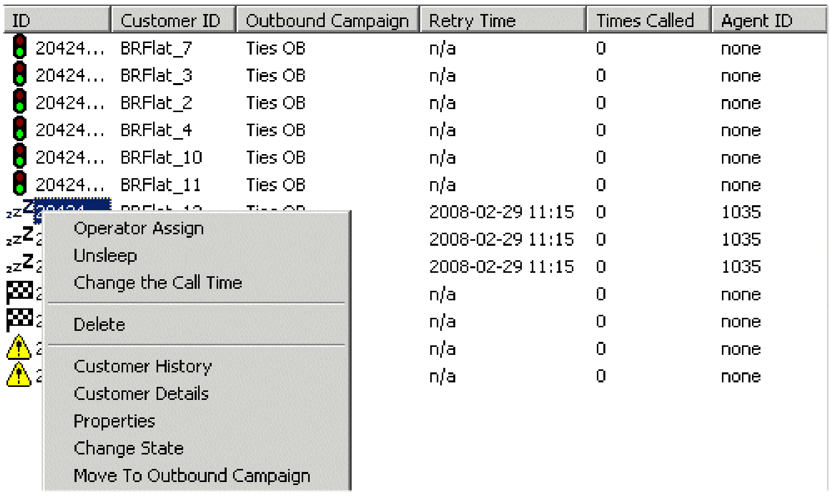
- To filter information, click the **Filter** button.
- Select or enter the *Event, Operator or Event Text* and a date and time period, then click the ***Filter Events*** button on the right.
- To add a Note or document, click the **Add Note** or **Attach..** buttons.
- To display all information associated with the caller, click the '**Reset Values'**



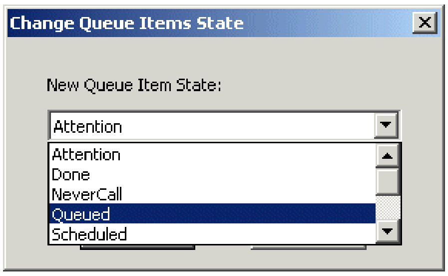
Changing State of Queued Calls

To change the current queue state of a calls with different call outcomes:

- Select and right click on the queued calls
- Select the **Change State** option from the drop down menu.



- In the Change Queue Item State dialog select the queue state that you wish to display for the selected calls.

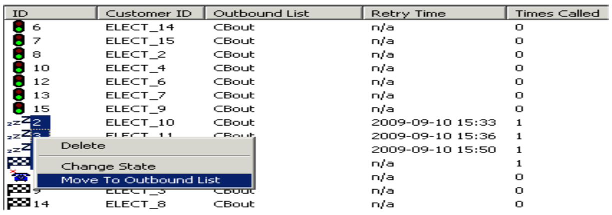


Move to Outbound List

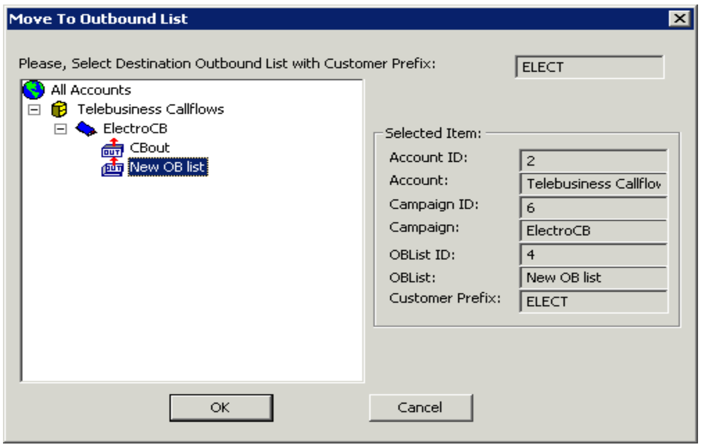
The most efficient way to move queued calls from one Outbound list to another is by using the **Queue Manipulation Wizard** (**Outbound: Edit – Bulk Change Queue**).

However, if you just want to move a few calls from one Outbound list to another, you can also use the following steps:.

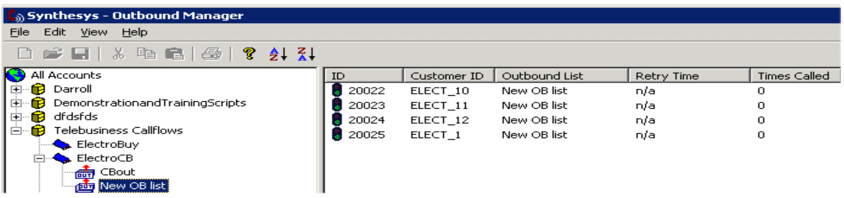
- Right-click on the calls that you wish to move and select the ***Move to Outbound List*** option.



- In the *Move to Outbound List* dialog, select the target outbound list, displaying all relevant details on the right-hand-side.



- Click ***OK*** to remove the calls from the original queue and to queue them as newly queued items in the selected outbound list.



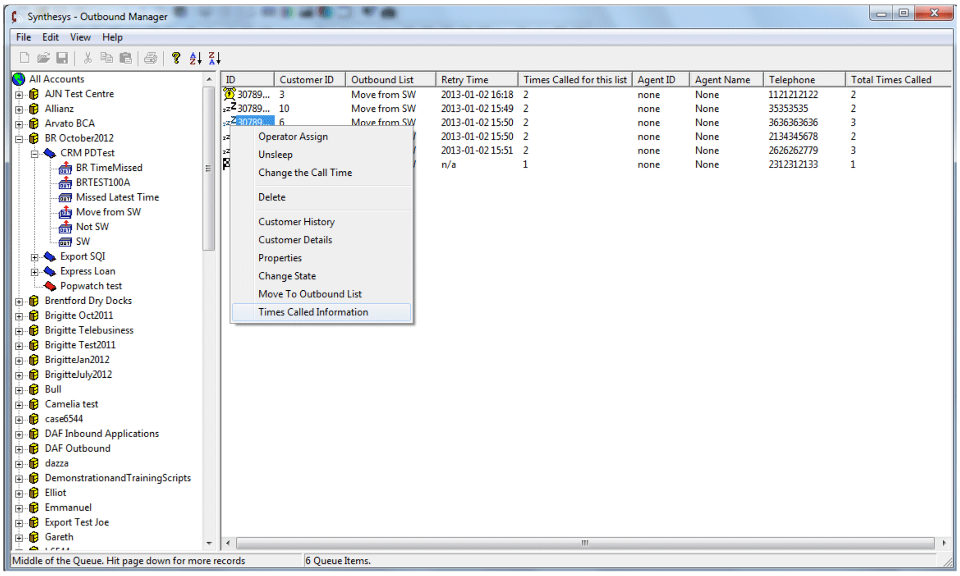
All moved calls, regardless of their current queue state, will be displayed in the target list as freshly queued calls, with the number of times called set back to 0.

To move multiple calls *on a regular basis use the* ***Queue Manipulation Wizard*** *(**Outbound: Edit – Bulk Change Queue**).*

Times Called Information

You can view the number of times a record has been dialled by looking at two columns in the Outbound Manager. The ***Times Called for this list*** column shows the number of dials for the selected outbound list, the ***Total Times Called*** column shows the total number of dials for the lead.

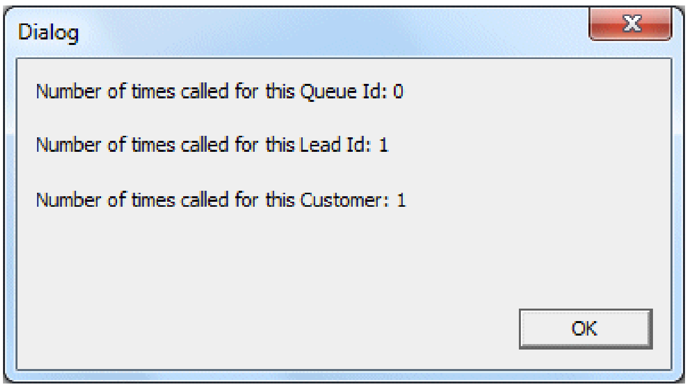
- Right-click on the queued call in the *Outbound Manager* and select the **Times Called Information** option from the drop down menu.



In the dialog displayed you can see the number of dialls for the selected **Queue ID**, **Lead ID** and **Customer** record.

*The **Number of times called** information in our example shows that there are 2 dial events for the **Queue Id** in the current Outbound list.*

*We can however see that the customer record has also been called from another Outbound list, as a '3' is shown for the **Lead Id** and for the **Customer**.*

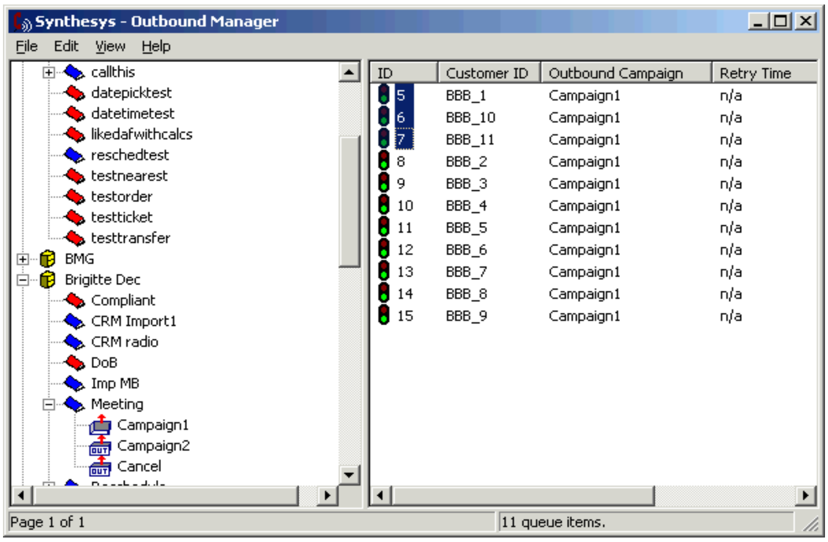


Deleting Queued Items

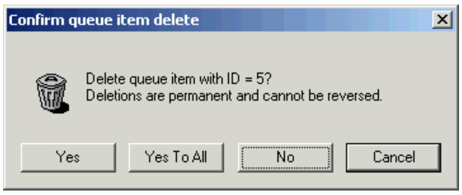
To delete selected items from the call queue:

- Right click on the calls and select Delete from the menu.

For multiple call selection you can use the Shift or Control keys in combination with selecting relevant ID's in the call queue.



- To delete all selected from the call queue click the ***Yes to All*** button in the *Confirm queue item delete* window.



- To check each ID separately click ***Yes*** to delete the ID or ***No*** to retain the ID in the queue.

A message will confirm the number of items deleted successfully.

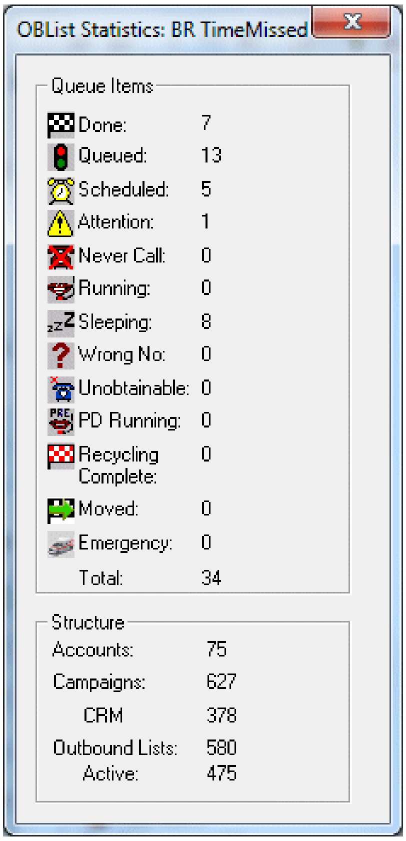
Viewing Queue Statistics

To view statistical information on all calls queued for a particular account or campaign:

- Right click on the relevant account or campaign and select Statistics from the drop down menu.

We have selected Statistics for the account *Sales Survey.*

The Queue Items shown for the currently selected outbound list are as follows:



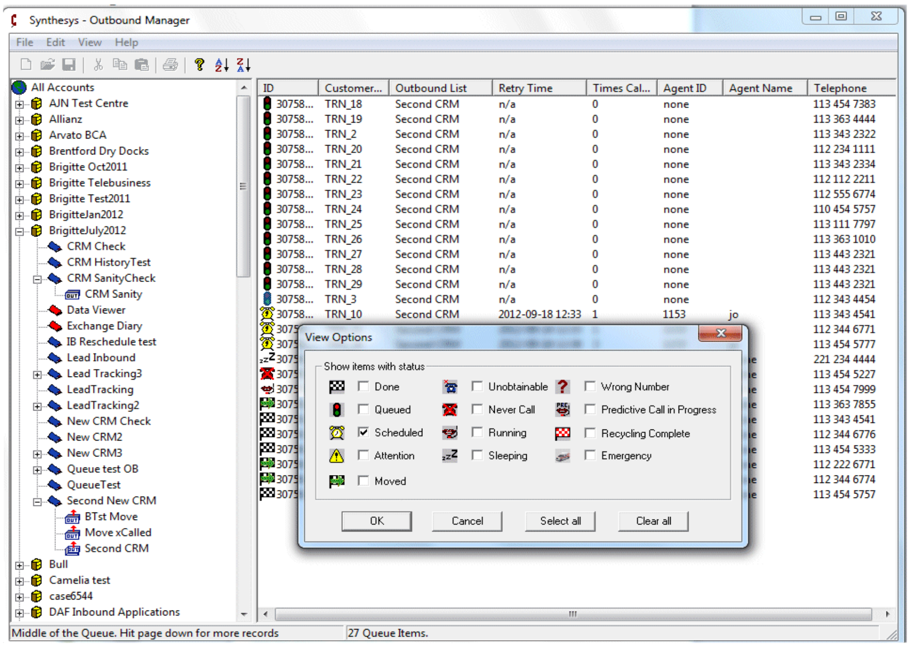
7	O/B calls have been done/ completed
13	O/B calls are queued
5	O/B calls have been rescheduled to be taken at a specified time
1	O/B call is set for attention of the supervisor
8	O/B calls have sleeping status, to be taken at a specified time
34	Total number of O/B calls currently in the queue

Setting a Filter

To set a Filter to display particular call outcomes only, go to **VIEW** on the **menu bar** and select **Set Filter**.

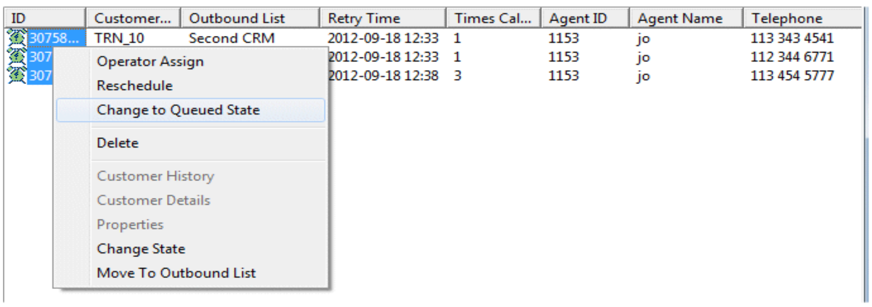
- To show all queued items, click the '***Select all***' tab and then OK.
- To start a new selection, click '***Clear all'***, before ticking the required status.

In our example we have placed a tick into the *Scheduled* box, to display only calls with the status *Rescheduled*.



To place all these rescheduled calls back into the live queue:

- Select and right click on all calls and select ***Change to Queued State***.



To search for a specific Customer ID, Telephone Number, Agent ID, Agent Name or Queue ID, use the **Set Search Filter** option described on the next page.

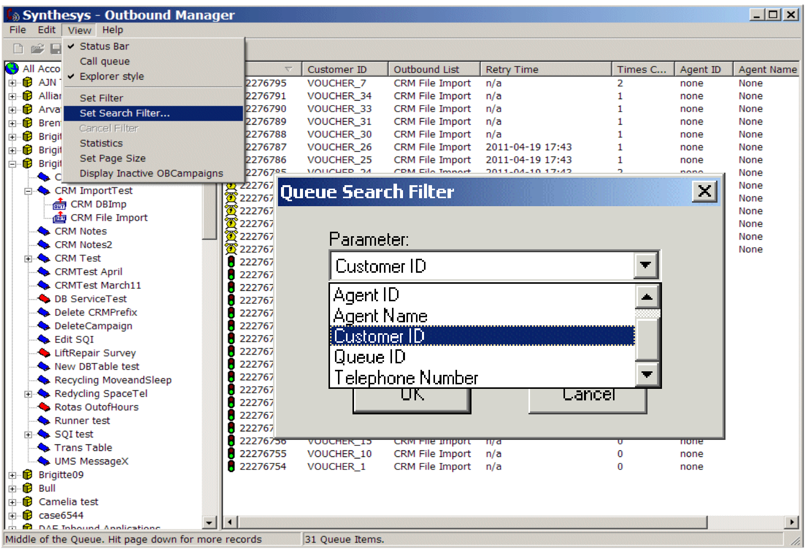
Set Search Filter

The Set Search Filter option is used to carry out searches based on ‘Customer ID’, ‘Telephone Number’, ‘Agent ID’, ‘Agent Name’ or ‘Queue ID’.

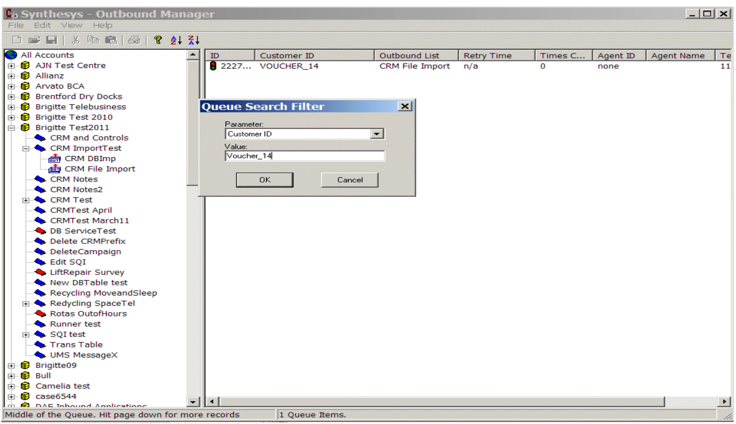
- To search for specific records in all accounts, select the *‘**All Accounts’*** icon in the left-hand side of the Outbound Manager, before clicking on *Set Search Filter.*

- To display matching records for a ***specific Outbound List***, select this Outbound List, before clicking on *Set Search Filter.*

In our example, we select the ***All Accounts*** icon before clicking *Set Search Filter.* As search criteria, we choose ***Customer ID*** from the parameter drop down list.



We enter a specific Customer ID (i.e. Voucher_14) and click OK, to return the matching record(s) for the selected Customer ID.



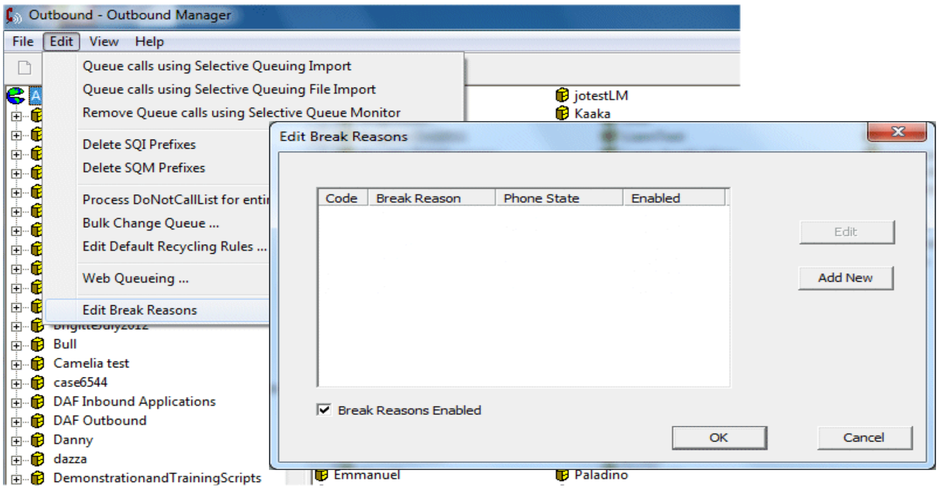
Go to ***View*** on the menu bar and select ***Cancel Filter,*** to display all queued items again.

EDIT 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.

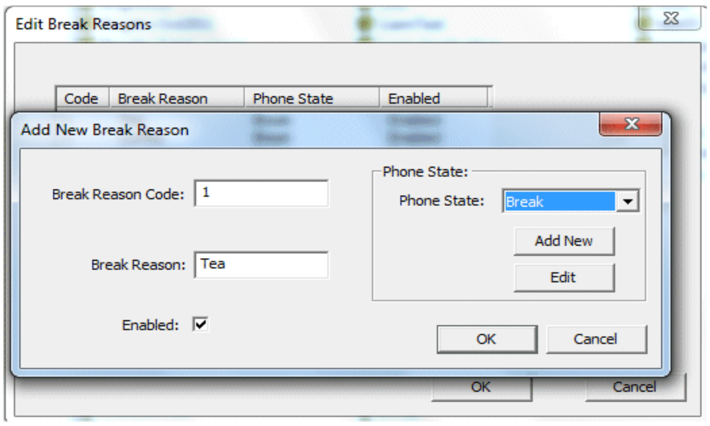
To add new break reasons

- 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.

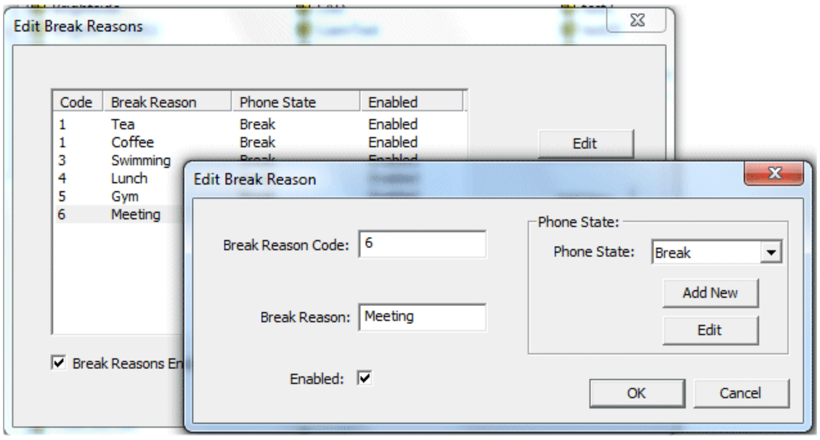
- Enter the ID/ code (as used by your Telephony Switch) for the first reason, into the **Break Reason Code** field.
- Enter the reason for the break into the **Break Reason** field.
- Tick the **Enable** box to display the reaon and allow selection at run time.
- Select or enter the **Phone State (**to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



- Click OK to save the changes.

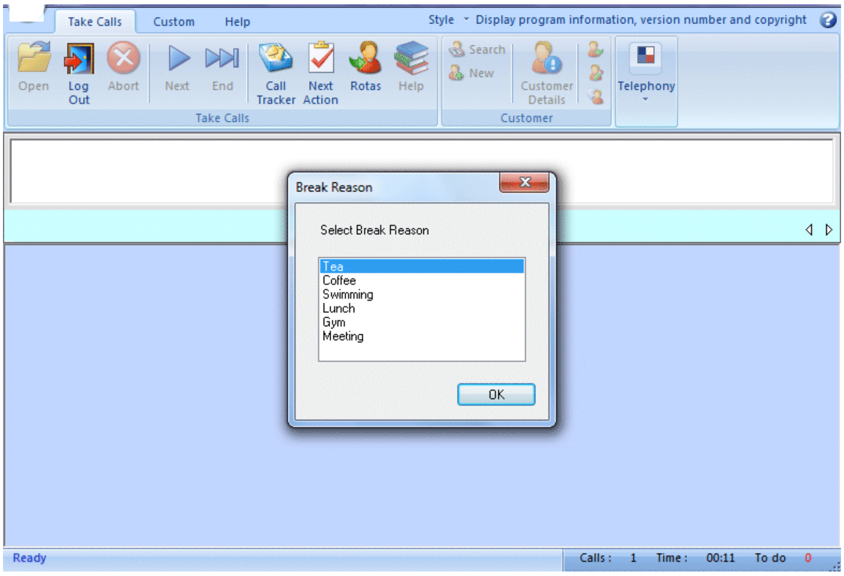
To change information of existing break reasons

- 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.

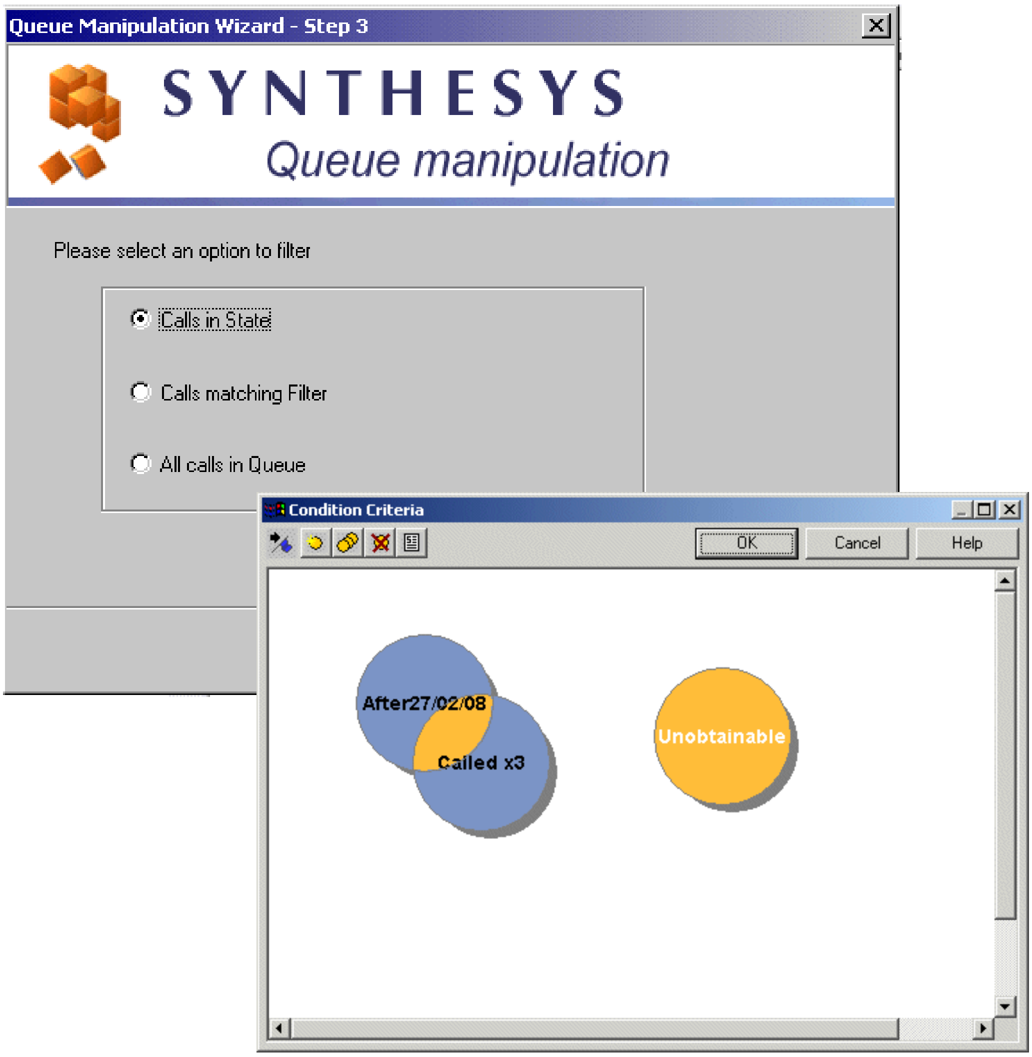


*If the message: **Failed to save 'break reasons enabled' to synthesys.inf** is displayed, when ticking/ un-ticking the **Break Reasons Enabled** checkbox, please ask someone from your IT department with full system administration rights to enable or disable the break reasons.*

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



THE QUEUE MANIPULATION WIZARD



THE QUEUE MANIPULATION WIZARD

INTRODUCTION

The Queue Manipulation Wizard is used for global manipulations on a queue effecting all items queued or to manipulate the queue of a selected Outbound list only.

Global Queue Manipulation 

Occasionally users may want to change the status of all sleeping calls to *queued*, or they may want to move all attention calls to a different outbound list, or queue them.

To achieve this global manipulation of queued items, the **All Accounts** icon has to be selected in the left-hand side of the Outbound Manager, before opening the *Queue Manipulation Wizard.*

In the *Queue Manipulation Wizard* users then choose either the option ***Calls in State*** or ***All calls in Queue*** and follow the instructions as described in the wizard.

Manipulation on OB Campaign level only 

To manipulate queue entries on outbound list level, **a specific outbound list must be selected** in the left-hand side of the Outbound Manager, before opening the *Queue Manipulation Wizard.*

Users then choose one of the available options ***Calls in State, Calls matching Filter or All calls in Queue*** and follow the instructions provided by the *Queue Manipulation Wizard to* change the current queue state of items in the selected Outbound list.

The Calls matching Filter option always implies Outbound list level and is used to define specific selection criteria for manipulating the state of queue entries in a selected Outbound list.

Scheduling a Queue Manipulation Action

Users can decide to manipulate the queue immediately, or at a later stage, creating a report and schedule in the Synthesys Campaign Manager.

The ***Report Tool*** used for the report schedule is the ***GSCScheduler Service*** and users must enter the **name or prefix** associated with the queue change action.

For more information, please see the section ***Scheduling Bulk Queue Change***.

Opening the Queue Manipulation Wizard

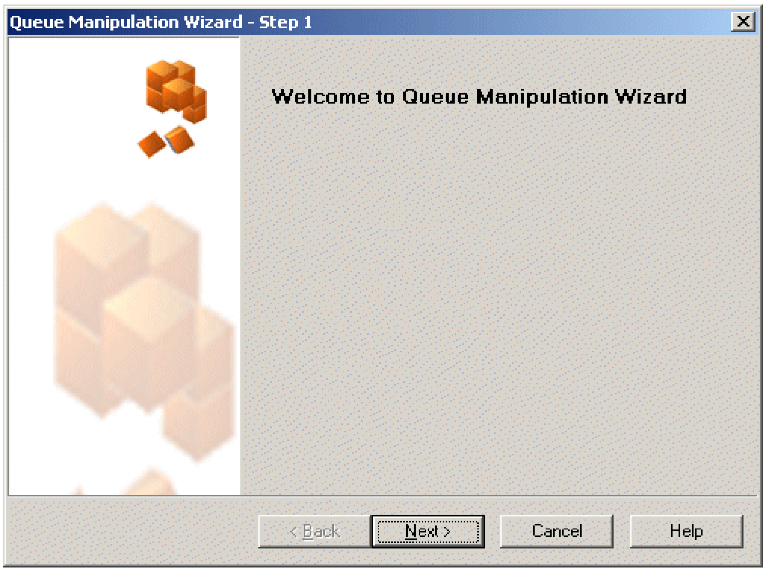
To manipulate queued items of an outbound list using the *Queue Manipulation Wizard:*

- Go to ***Outbound*** under the **Setup** heading of the Synthesys main screen to open the Synthesys Outbound Manager.
- Select the required Outbound list and go to **Edit** on the menu bar.
- Select **Bulk Change Queue** to open the *Queue Manipulation Wizard*.

Before opening the Queue Manipulation Wizard, select All Accounts for a global manipulation of queued items or a specific outbound list to manipulate queue entries on outbound list level.

Queue Manipulation Wizard Welcome Screen

The *Queue Manipulation Wizard* will guide you through the various steps of manipulating your queue entries.



- The *Next*> button is used to navigate to the next page of the wizard.
- The <*Back* button to move back to the previous page.
- To abandon an action without saving the changes, click *Cancel.*

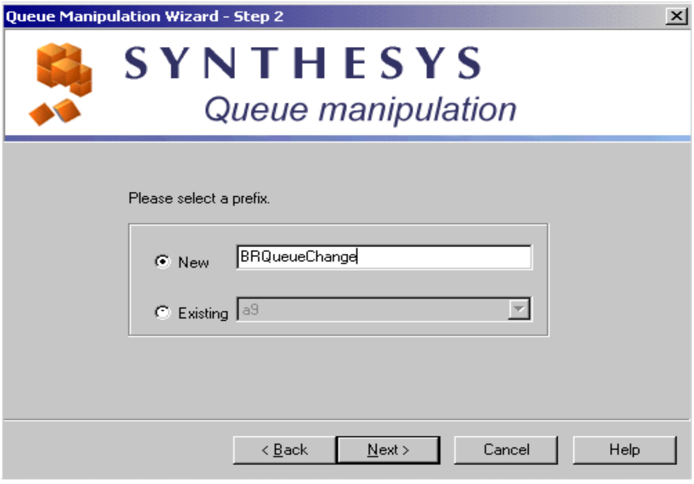
Entering a Prefix or Name

To start your queue manipulation action:

- Enter a **New name or Prefix** for your queue manipulation action

Or

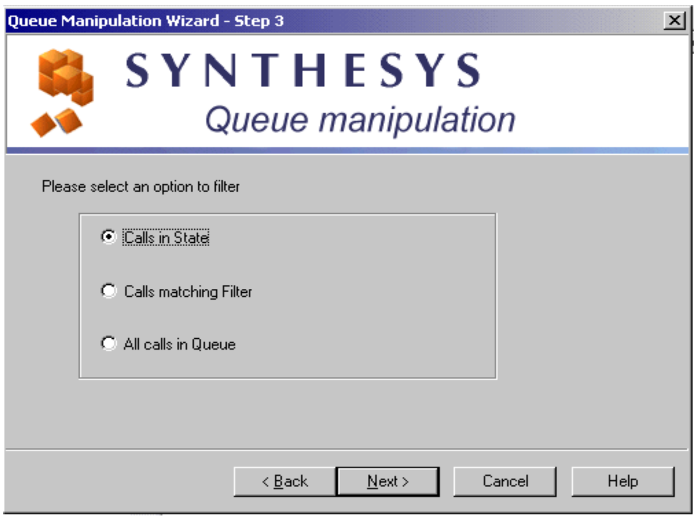
- Select an **Existing name** from the drop down menu.



Available Options

In the next page of the *Queue Manipulation Wizard*, select the required options:

- Calls in State
- Calls matching Filter
- All calls in Queue.

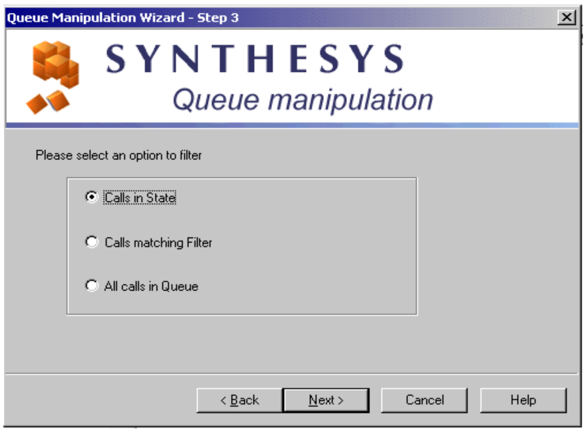


OPTION 1: CALLS IN STATE

Using the ***Calls in State*** option:

Select a specific Outbound list*, to manipulate queued items for that list.*

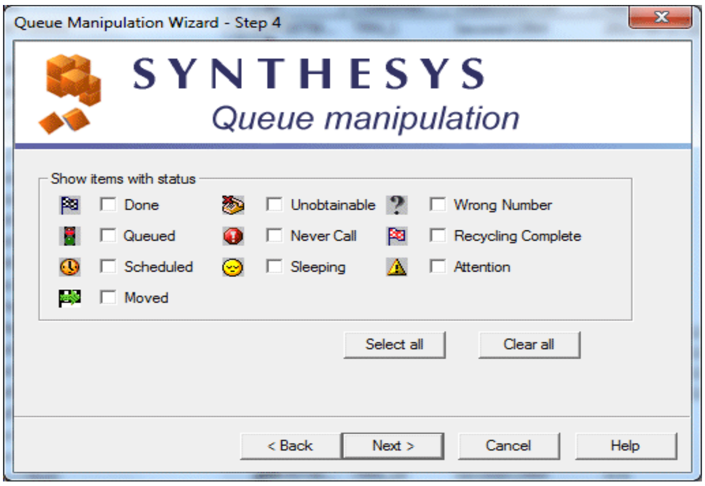
Only select All Accounts before opening the Queue Manipulation Wizard if you wish to manipulate queued items for all accounts.



Move to the *Next>* page of the wizard to select the outcome(s) to be changed.

- Tick any outcome, as required, before moving to the next page of the wizard.

To change the state of sleeping calls for example, tick the checkbox next to the sleeping icon.



Next, select an Outbound list: Move to the next page of the wizard, where you will be prompted to select the Outbound list that you wish to manipulate. Only choose **All Accounts**, if specified changes are to be made for the whole queue, i.e. all call lists.

Following the selection of the Outbound list, move to the next step of the wizard, to specify the changes that you wish to make.

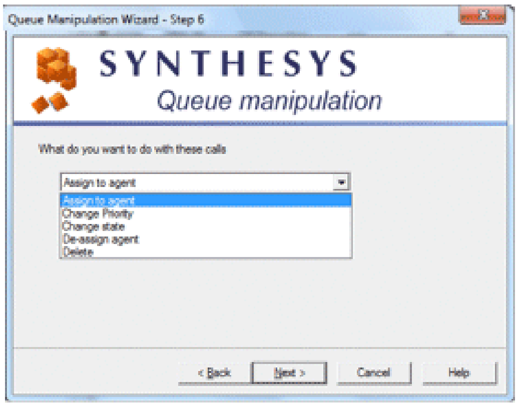
Assign to Agent

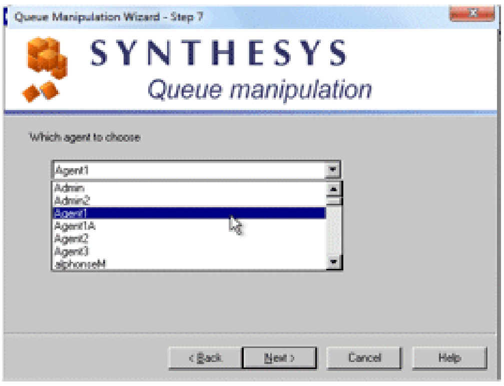
The ***Assign to Agent*** option allows you to assign ***rescheduled and sleeping*** calls to a particular agent.

Any outcomes other than rescheduled or sleeping that may have been selected will be ignored as they can't be assigned.

In the *Next>* page of the wizard

- Select the agent that is to be assigned to the currently rescheduled or sleeping calls.





In the final page of the *Queue Manipulation Wizard* you can manipulate the queue immediately or create a *GSCScheduler* report in the Synthesys Campaign Manager.

For more information, see the section ***Scheduling Bulk Queue Change***.

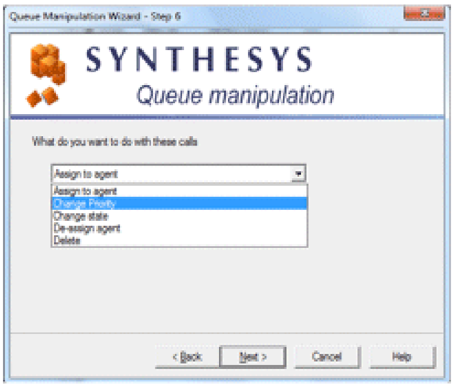
To change details, if required, click the ***<Back*** button. To process the action click ***Finish,*** to abandon the action without saving any changes click ***Cancel*****.**

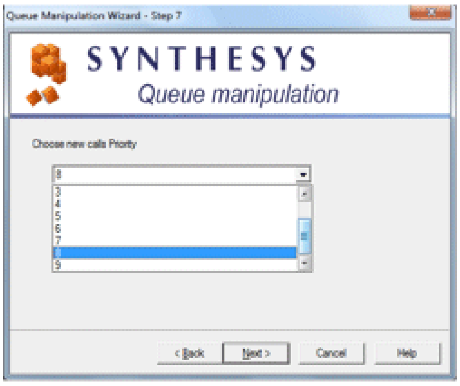
Change Priority

The ***Change Priority*** option allows users to change the call priority of selected records or call outcomes.

Having defined the records or outcomes concerned in Step 4 of the Queue Manipulation wizard

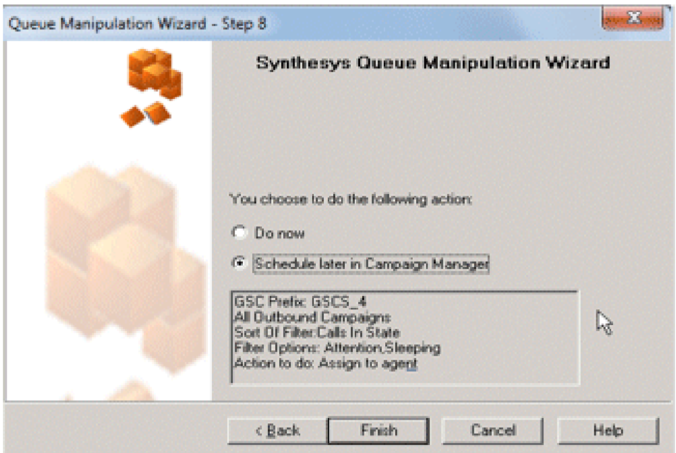
- Select ***Change Priority*** in Step 5 of wizard.
- Next, choose the call ***Priority*** that is to be assigned from a range between 0 – 9 (Idle = 0, Low =1, High = 9).





In the final page of the *Queue Manipulation Wizard* you can manipulate the queue immediately or create a *GSCScheduler* report in the Synthesys Campaign Manager.

For more information, see the section ***Scheduling Bulk Queue Change***.

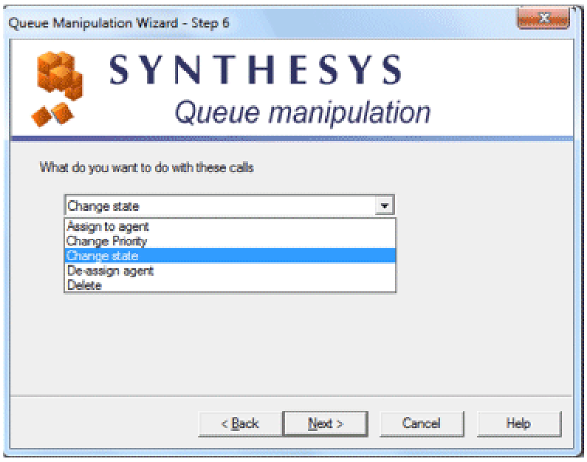


- To change details click ***<Back***.
- To save the changes, click **Finish.**
- To abandon the action without saving changes, click ***Cancel***.

Change State

In this page of the wizard you can select the change that is to take effect.

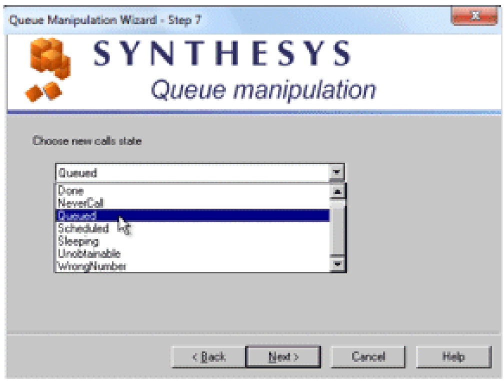
Options include ***Assign to agent*** (only sleeping & rescheduled outcomes), ***Change State, De-assign agent, or Delete***.

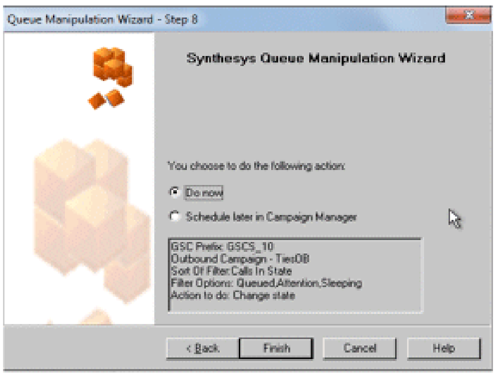


Having selected the ***Change State*** option, the next dialog will show the associated outcomes that can be selected.

- Select the relevant outcome, as required, i.e. *Queued* to change the state of sleeping calls to queued.

The final page of the wizard provides a summary of the action to be taken. You can either manipulate the queue immediately or schedule a GSCScheduler report, described in the section ***Scheduling Bulk Queue Change****.*



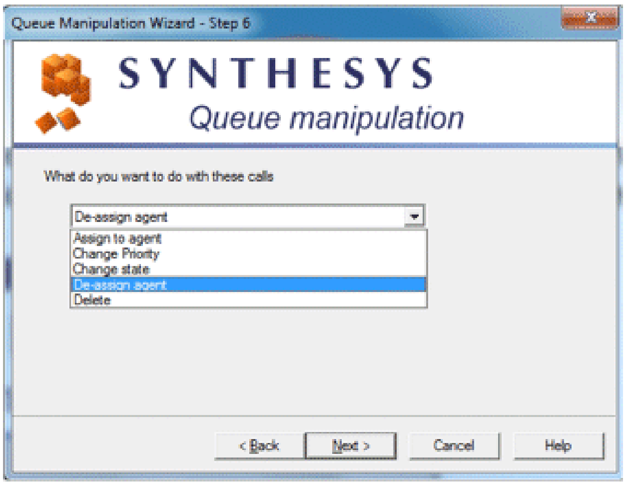


- To change details, if required, click the ***<Back*** button.

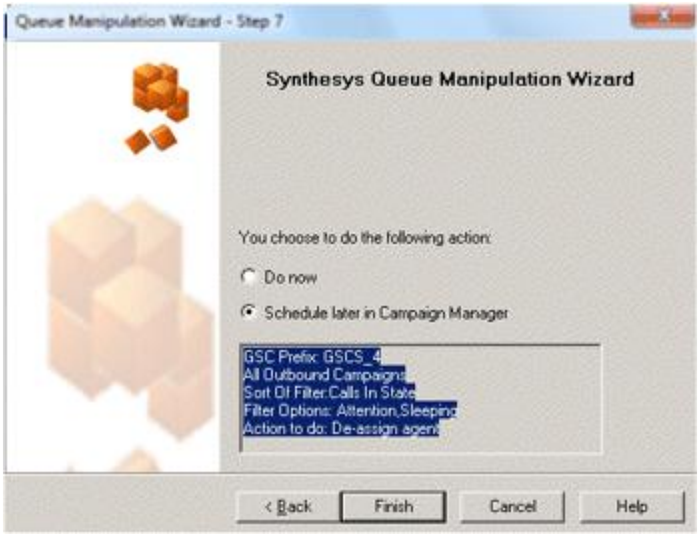
- To process the action, click ***Finish,*** to abandon the action without saving any changes, click ***Cancel.***

De-assign and Delete Options

Further options that can be selected in the *Queue Manipulation Wizard,* as part of the initial *Calls in State* selection, include ***De-assign agent and Delete***.



As no associated selections are required for ***De-assign agent or Delete***, clicking *Next>*, will move you directly to the final page of the *Queue Manipulation Wizard,* providing a summary of the action to be taken.

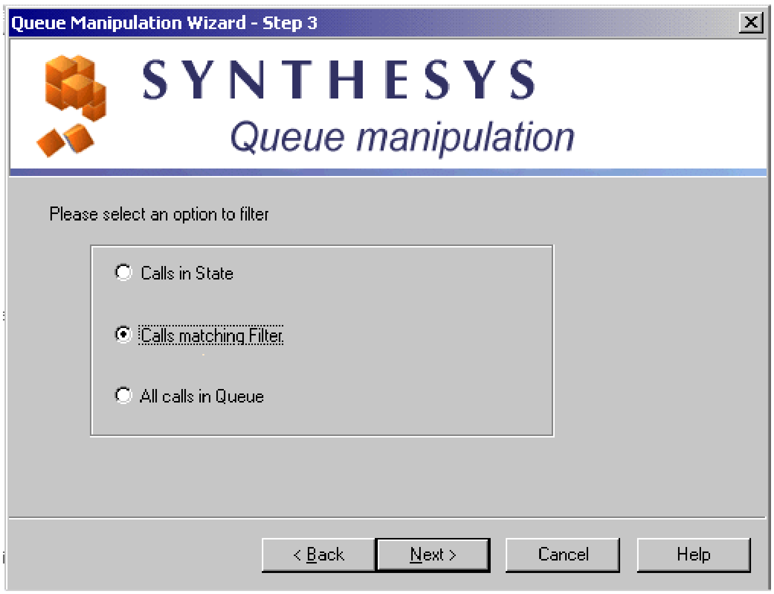


Users can manipulate the queue immediately, or create a GSCScheduler report in the Synthesys Campaign Manager, described in the section **Scheduling Bulk Queue Change**.

- To change details, if required, click the ***<Back*** button.
- To process the action click ***Finish,*** to abandon the action without saving any changes click ***Cancel*****.**

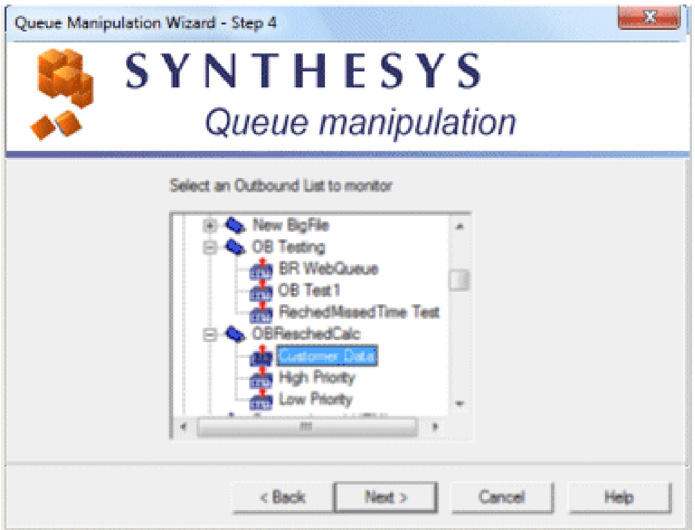
OPTION 2: CALLS MATCHING FILTER

The ***Calls matching Filter*** option, allows users to define conditions for manipulating the queue entries for a selected Outbound list, which should be selected, before opening the *Queue Manipulation Wizard*.



If no outbound list was selected before opening the wizard, users will be prompted to do so after choosing the ***Calls matching Filter*** option.

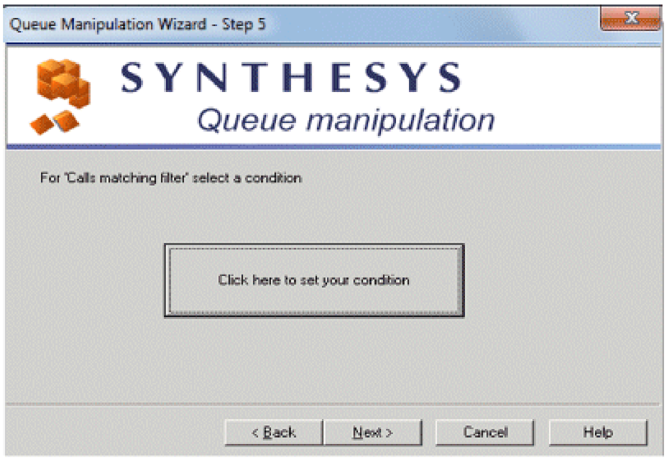
If an Outbound list has already been selected, the wizard will skip this step.



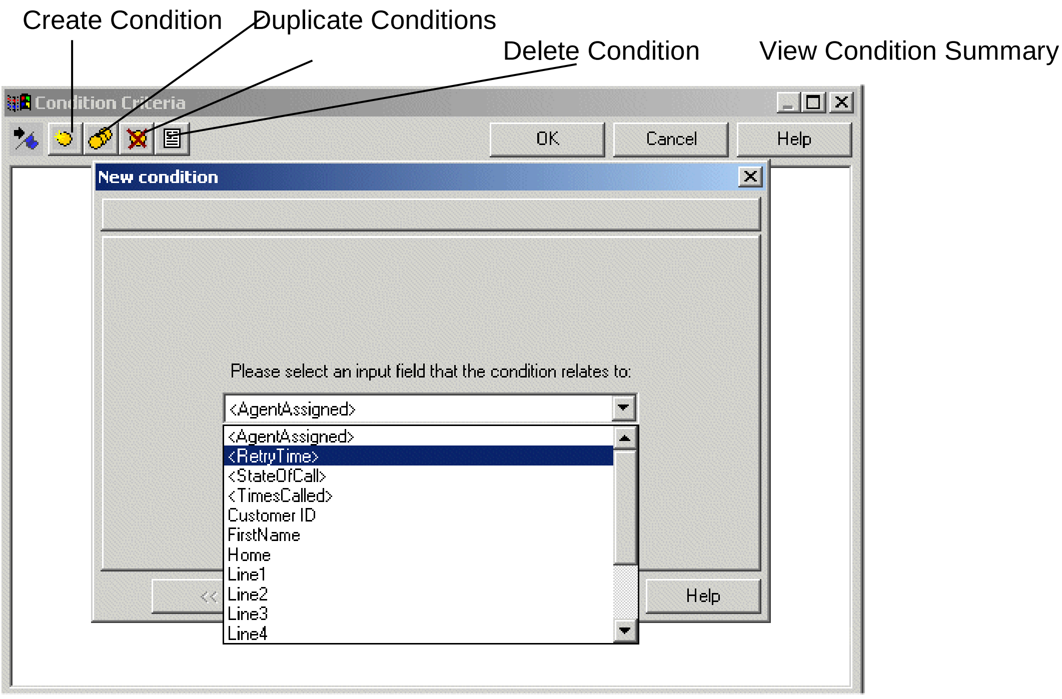
Move to the Next> page of the *Queue Manipulation Wizard,* to define the required selection criteria.

Defining Conditions

In the ***Calls matching filter*** dialog the conditions to be used for the queue manipulation are defined.



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

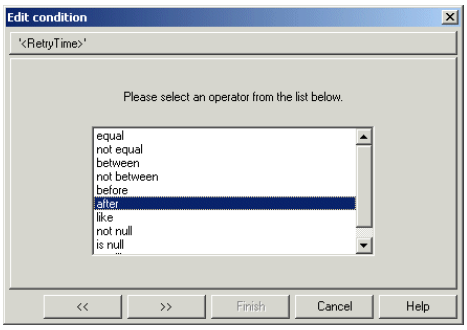


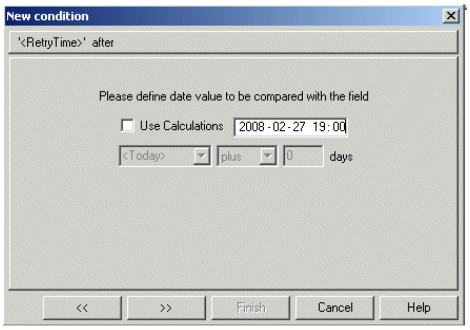
When using the Move to Outbound list option, all moved calls, regardless of their current queue state, will be queued and displayed in the target Outbound list as freshly queued calls, with the number of times called set back to 0.

*To move **queued** calls only, the appropriate condition must be set using the <State of Call> option.*

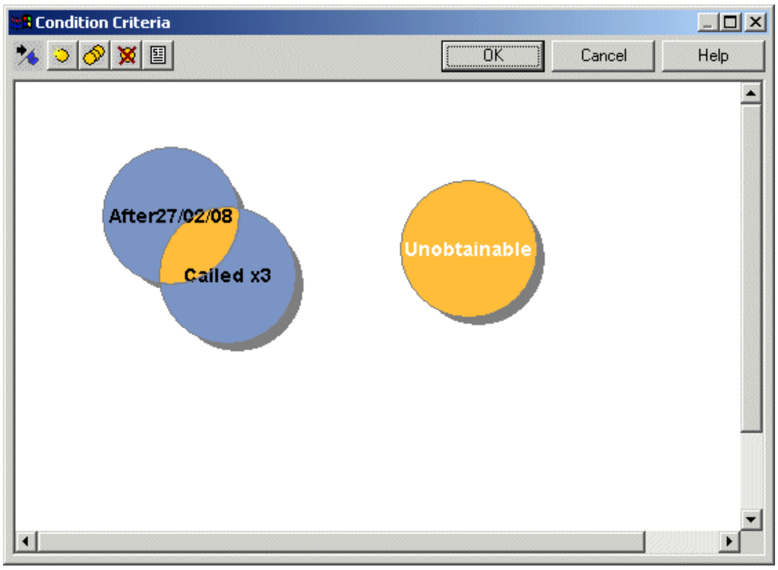
To create a new condition:

- Click the ***Create Condition*** icon.
- In the ***New Condition*** window select the property to define your search (in our example we have selected **<RetryTime>**).
- Click the button to select the required operator **after** and add the date and time **2008 02 27 19:00** to specify that the changes will affect queued calls after the selected date and time entered.





- In the next page of the wizard ***add a name for our condition*** and click ***Finish***, to display a floating disc on the canvas.
- Further conditions can be defined, clicking **Create Condition** .
- To **edit** existing **conditions**, double-click on the relevant condition disc.



If 2 discs overlay completely press Control on the keyboard to drag them apart.

Each condition disc can be manipulated, clicking and dragging it around the canvas.

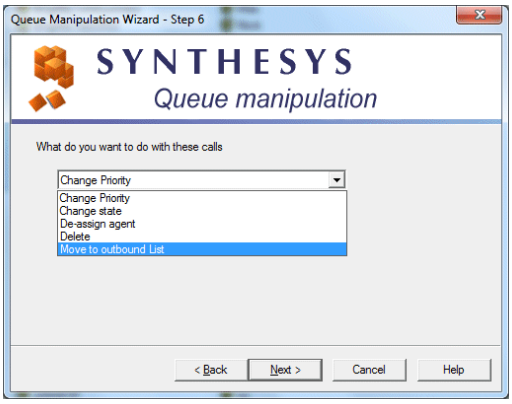
Any discs that *overlap* with one or more other discs will *imply a Boolean 'AND'* to operate between the conditions. For example:

(<RetryTime>'after' '2008 02 27 19:00' AND Times called =3) OR (Result = Unobtainable)

Click OK to return to the *Calls matching filter* screen and Next> to proceed to the next part of the *Queue Manipulation wizard.*

Defining Actions

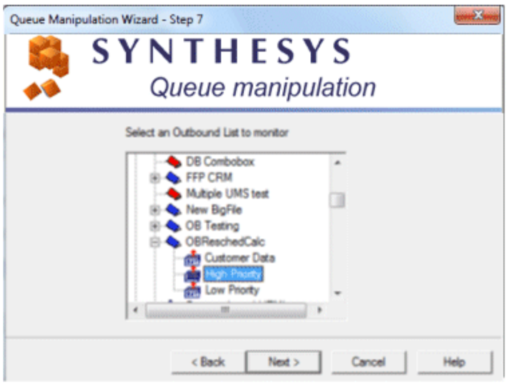
From the options displayed, choose what to do with the filtered queued items, e.g. ***Move to Outbound List***.



* Moved will be queued in the target Outbound list as freshly queued calls, with the number of times called being set back to zero.

To filter out and move selected queue states only, use the <State of Call> option when creating your condition.

The next page of the wizard will prompt users to select the destination Outbound List.



In the final page of the wizard users can either manipulate the queue immediately, or create a GSCScheduler *report in the Synthesys Campaign Manager, described in the section* **Scheduling Bulk Queue Change***.*

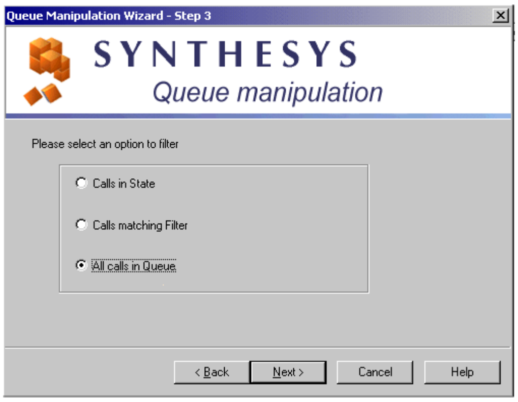
Click *Finish* to process the action.

To change details, if required, click *<Back*, to abandon the action without saving the changes, click the *Cancel* button.

OPTION 3: ALL CALLS IN QUEUE

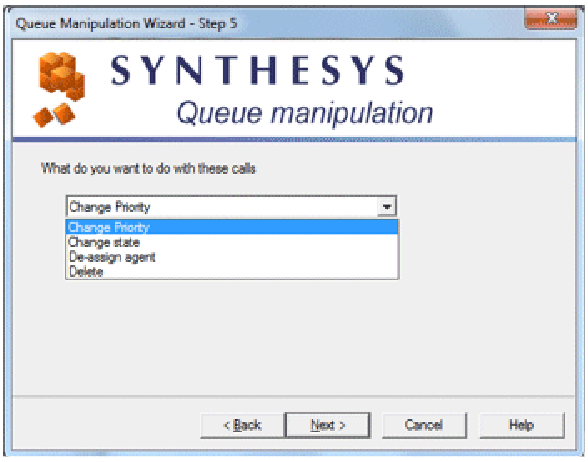
The option ***All calls in Queue*** is used to manipulate the state of queued items for all accounts or for a *selected Outbound List* only.

- Select *All Accounts* if the changes are to affect all accounts
- Selecting a specific Outbound list, to manipulate queued items that list



Next, select an Outbound list: Move to the next page of the wizard, where you will be prompted to select the Outbound list that you wish to manipulate. Only choose **All Accounts**, if the specified changes are to be made for the whole queue/ all call lists.

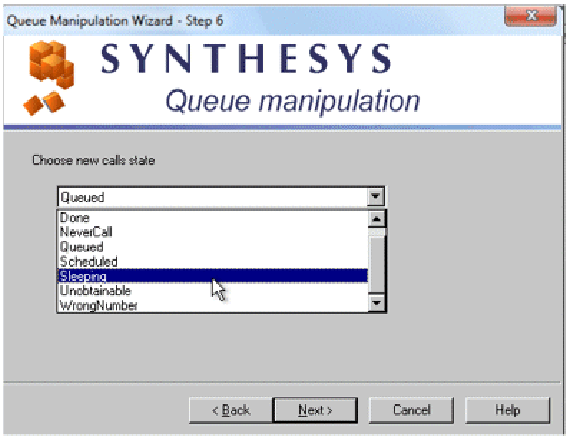
Following the selection of all or a specific Outbound list, move to the next step of the wizard, to specify the changes that you wish to make. Options include Change Priority, Change state, De-assign agent and Delete.



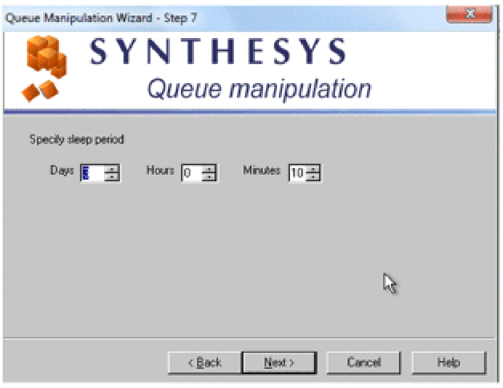
If either the option ***De-assign agent*** or ***Delete*** is selected, *Next>* will move you directly to the final page of the wizard, displaying a summary of the action about to be taken.

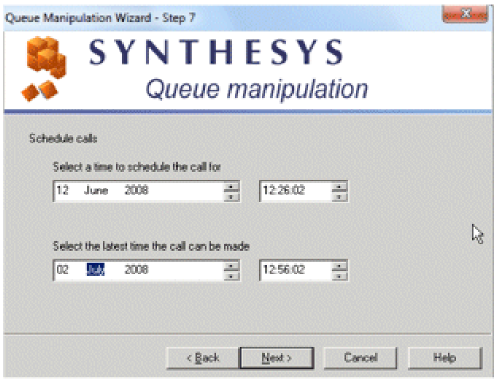
Check the details to ensure that the summary reflects your requirements, before clicking *Finish* to process the action.

If the option ***Change state*** is selected, the subsequent page of the wizard displays the available call state options.



On selecting ***Sleeping or Schedule***, the next pages of the wizard will either prompt you to specify the sleeping period, or the schedule date and time.





In the final page of the *Queue Manipulation Wizard*, check the summary displayed.

Either manipulate the queue immediately,

or create a GSCScheduler *report in the Synthesys Campaign Manager, described in the section* 'Scheduling Bulk Queue Change'*.*

Click *Finish* to process the action. To change details, click *<Back*, to abandon the action without saving changes, click the *Cancel* button.

SCHEDULING BULK QUEUE CHANGE

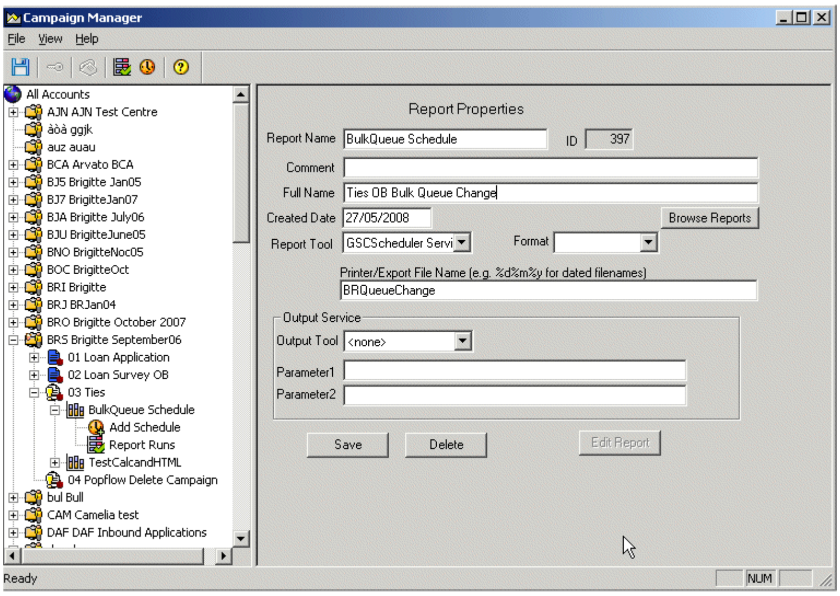
To action the outbound bulk queue change via the ***Schedule later in the Campaign Manager*** option:

- Go to ***Reports*** under the **Setup** heading of the Synthesys main screen to open the Synthesys Campaign Manager.
- Create a ***GSCScheduler report*** for your bulk queue change.

Adding a GSCScheduler 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 a full report name (or 'None') into the ***Full Name*** field.
- Select ***GSCScheduler Service*** (Global State *Changer Scheduler*) in the **Report Tool** field. The Format will automatically be displayed as CSV.
- Type the **name or prefix** as entered in Step 2 of the *Queue Manipulation Wizard (*for example *BRQueueChange),* into the ***Printer/Export File Name*** field.
- Save your report.



Into the Printer/Export File Name field, enter the name or prefix as entered in Step 2 of the Queue Manipulation Wizard, when creating the conditions for the bulk queue change.

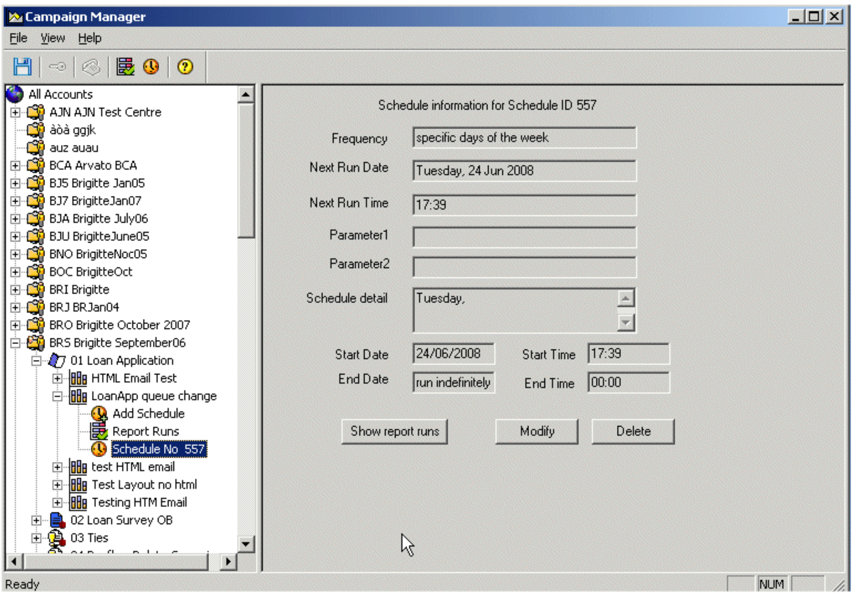
Next set up the report schedule.

Scheduling a GSCScheduler Report

To add a schedule for your ***GSCScheduler*** report:

- Locate and right click on your campaign 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 ***GSCScheduler*** report.

In our example, the report will run every Tuesday at 17.39pm.



To check that your GSC report has run successfully:

- Go to Report Runs and also check the queue in the Outbound Manager.

For further information regarding setting up reports and report schedules, please consult the ‘Managing Reports’ document.

SYNTHESYS
QUEUE MONITOR

SYNTHESYS QUEUE MONITOR

INTRODUCTION

The **Synthesys Queue Monitor** allows for calls to be removed from the queue of a selected Outbound List, if predefined conditions apply. Associated information will be added to the CRM history.

Only calls with call status 'queued', 'sleeping' and 'rescheduled' will be removed from the queue.

The Synthesys Queue Monitor provides a step-by-step guide through the various actions required.

Users determine the data source, plus the table and columns within that data source and then, using fields from the Synthesys CRM table, define the selection criteria to specify which calls are to be removed from the outbound queue.

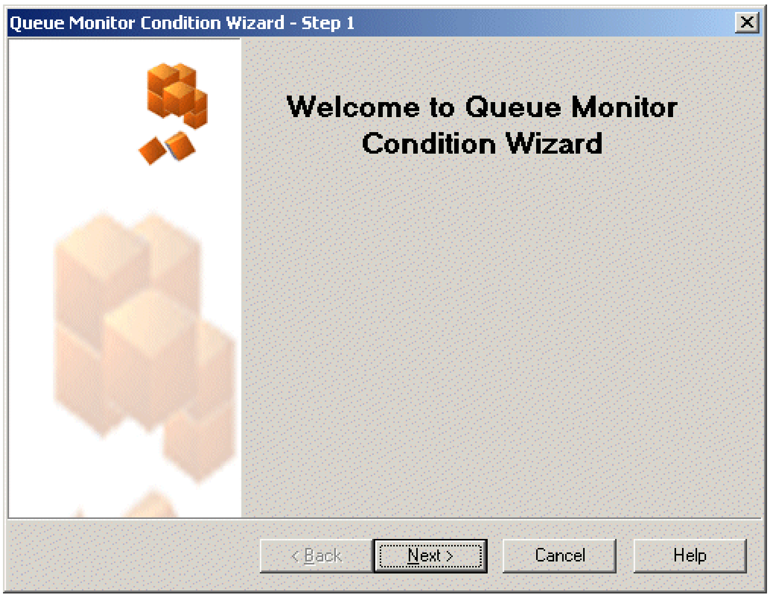
Users can furthermore decide whether to run the call remove process immediately or at a later stage, creating a SQM report and a schedule for the report run in the Campaign Manager.

The Synthesys Queue Monitor (SQM) is not a standard feature but needs to be purchased separately.

Opening the Queue Monitor ("SQM")

To remove selected customers from an outbound list using the Queue Monitor:

- Go to ***Outbound*** under the **Setup** heading of the Synthesys main screen to open the Synthesys Outbound Manager.
- Add or select the required outbound list.
- Go to **Edit** on the menu bar and select ***Remove Queue calls using Selective Queue Monitor*** to open the Queue Monitor.



The following pages provide a step-by-step guide to the Synthesys Queue Monitor Wizard.

Synthesys Queue Monitor ("SQM")

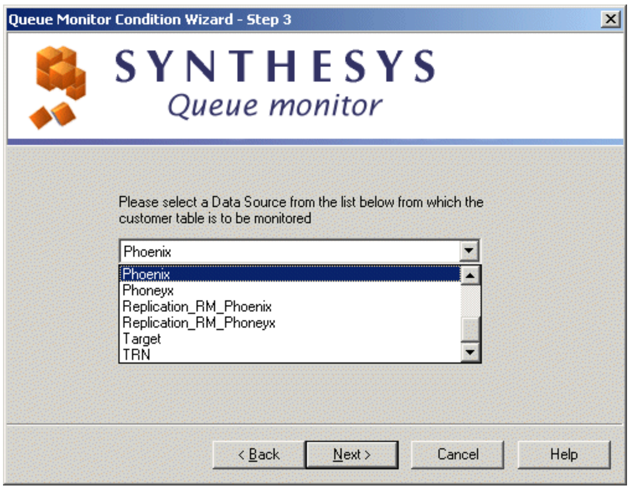
Part 1: Data Source & Table Columns

The first part of the wizard will determine which data source and which columns in one specific table or view from that data source are to be used for the de-queue process.

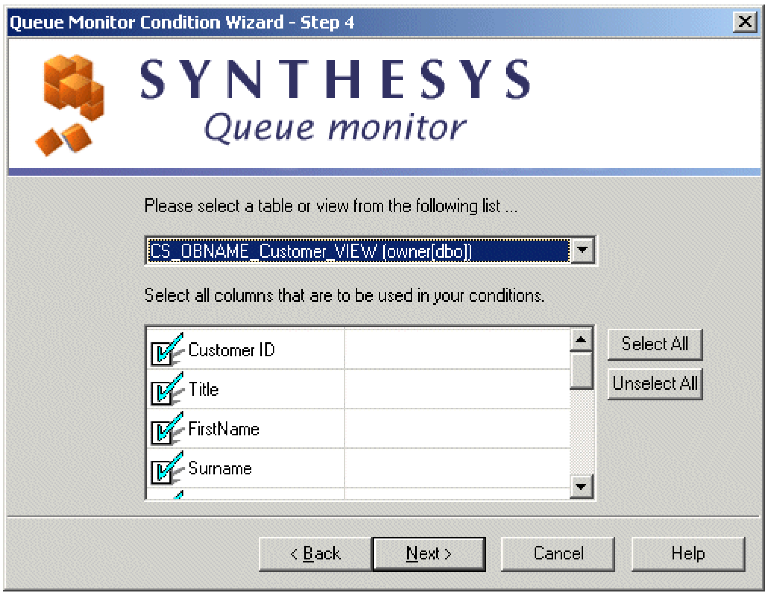
Step 2: To begin with, enter a **New name** for your SQM report **or** select an **existing SQM name** from the drop down menu.

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

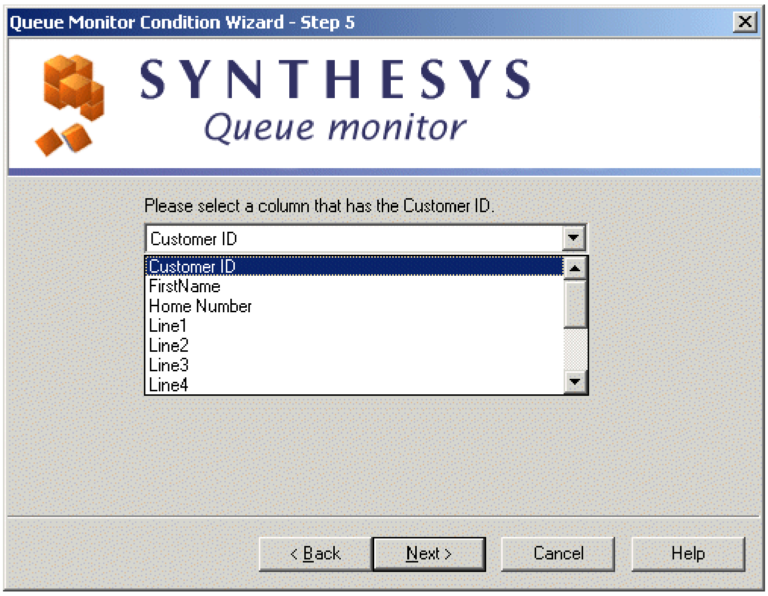
Step 3: Next, select the required data source from a list of all ODBC data sources available on the system.



Step 4: The next step involves the selection of one table or view from the selected data source, and the columns from that table/view to be used for the de-queue process.



Step 5: Now, select a column that contains the Customer ID.



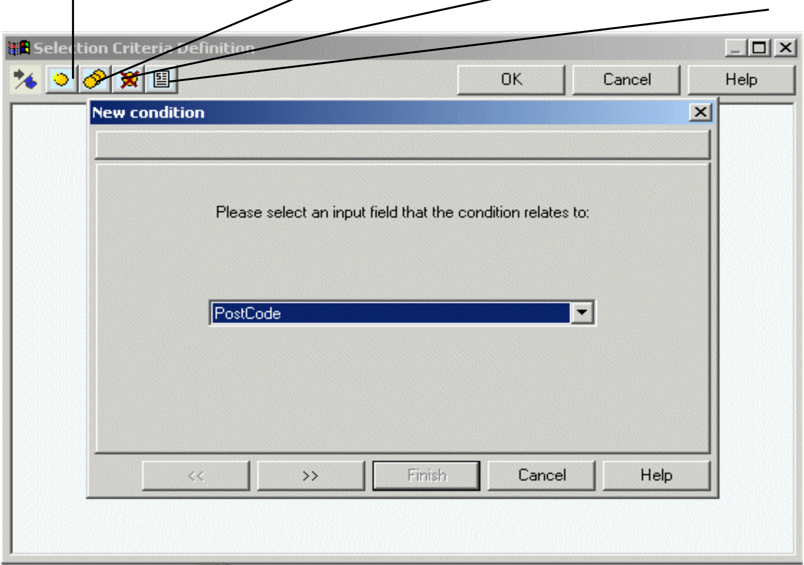
Part 2: Remove from Queue Selection Criteria

Step 6: Click the ‘Selection Criteria’ button, to open the ‘Selection Criteria Definition’ screen. Here you can specify, which calls to remove from the outbound queue.

Only calls with call status ‘queued’, ‘sleeping’ and ‘rescheduled’ will be removed from the queue.

The screen consists of a work area, also called “the canvas”, where coloured discs will represent 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.

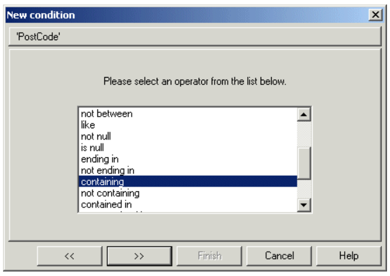
 ‘**Duplicate condition’.** Click this icon, to duplicate an existing condition.

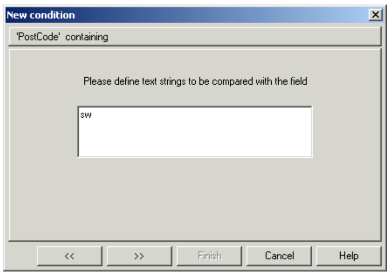
 **‘Delete a condition’.** Click on the disc that you wish to delete, and then on the ‘Delete condition’ icon.

 **‘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**.

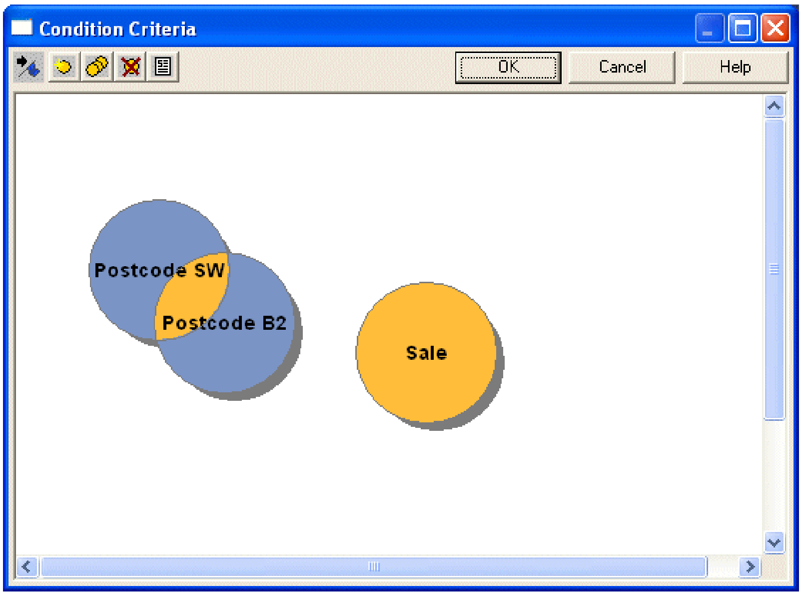




We are then prompted to enter a name for our condition, i.e. Postcode **SW**.

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:

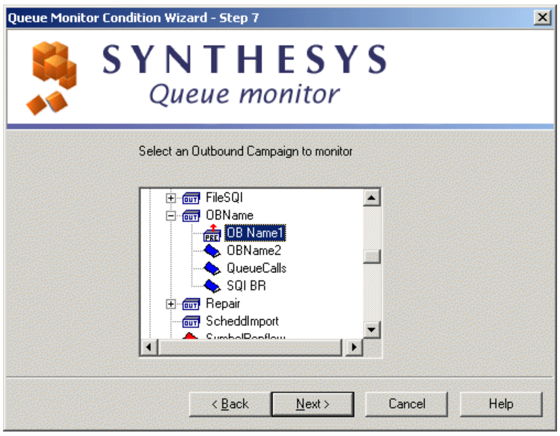
(Postcode SW **AND** B2) **OR** (if the condition is Sale)

Click OK, to return to proceed to the next part of the wizard.

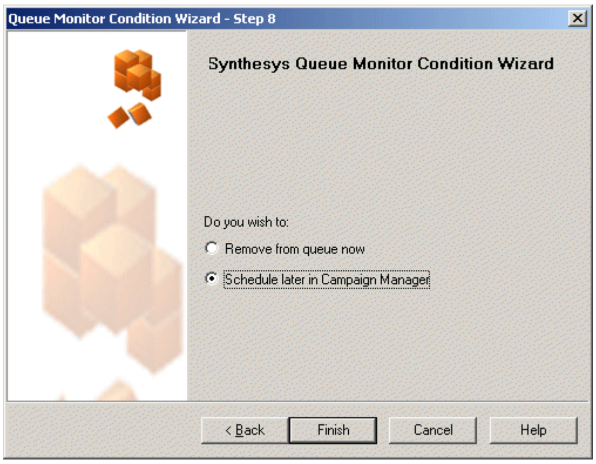
Part 3: Removing Queued Customers

You now need to select the Outbound List from which you want to remove the queued customers and decide whether to run the data de-queue process immediately or at a later stage, creating a SQM report and schedule in the Campaign Manager.

Step 7: Select the Outbound List from which you want to remove the customers from the outbound queue.



Step 8: Next, decide if you want to run the data de-queue process immediately or if you want to schedule a SQM report later in the Campaign Manager.



- Tick ***Remove from queue now*** if you want to remove the customers queued from the outbound queue immediately.
- Tick ***Schedule later in Campaign Manager*** to remove the customers from the Outbound queue at a later stage, with a scheduled report set up in the Campaign Manager.

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

Schedule a SQM Report in Campaign Manager

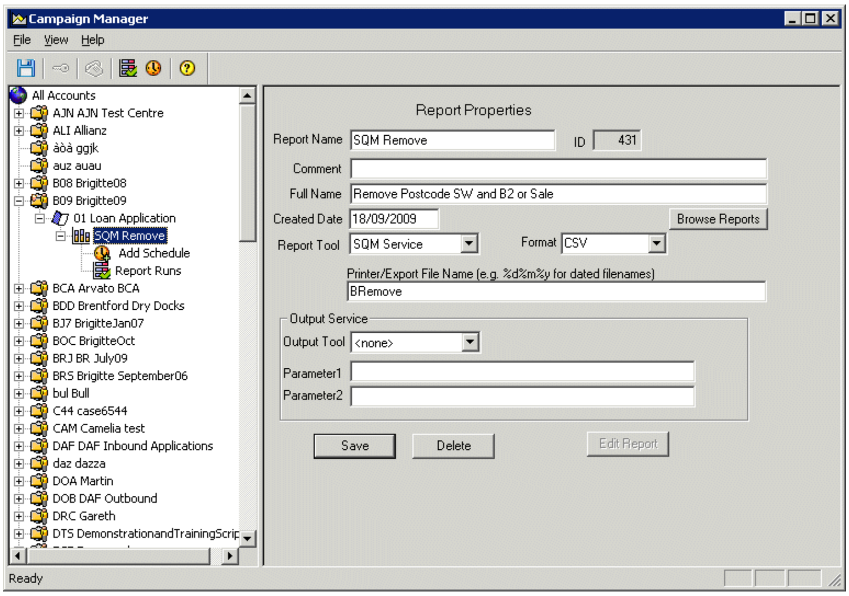
If the option Schedule later in the Campaign Manager has been selected:

- Go to ***Reports*** under the **Setup** heading of the Synthesys main screen to open the Synthesys Campaign Manager.
- Create a ***scheduled SQM report*** to remove selected customers from the outbound queue.

Setting up a SQM 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 a full report name (or 'None') into the ***Full Name*** field.
- Select ***SQM Service*** in the **Report Tool** field. The Format will automatically be displayed as CSV.
- Type in the name of your SQM, as entered in Step2 of the Queue Monitor wizard, into the Printer/Export File Name field, i.e. **BRemove.**
- Save your SQM report.

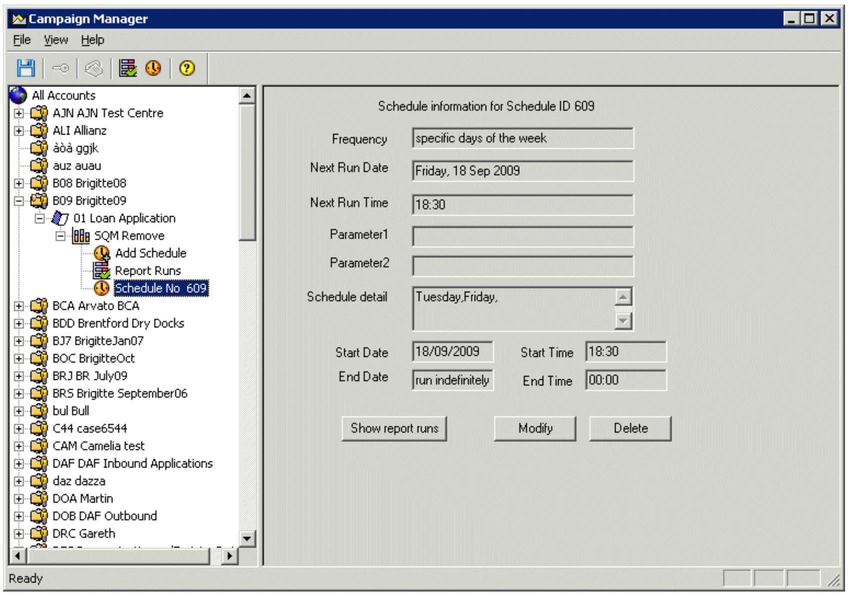


Scheduling a SQM Report

To add a schedule for your SQM report:

- Locate and right click on your campaign 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 SQM report.

In our example we have set up a schedule to run the report on a **specific day of the week**, ***Tuesdays and Fridays,*** with the next report run due on Friday the 18th September 2009 at 18:30.

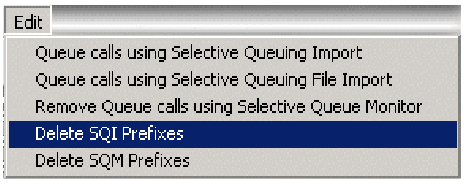


To check that your SQM report has run successfully:

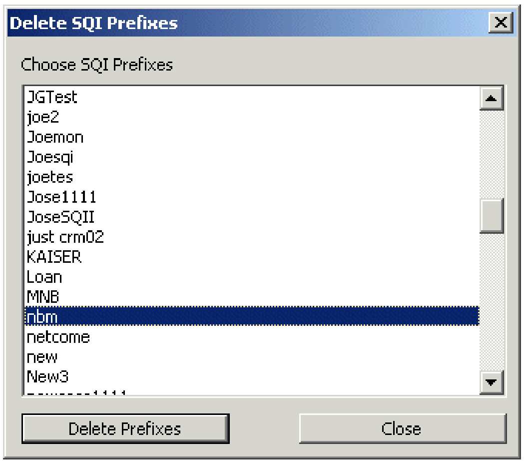
- Go to Report Runs and also check that the calls have been removed from the queue in the Outbound Manager.

DELETING SQI AND SQM PREFIXES

The function to delete SQI or SQM prefixes has been added to the Edit menu in the Outbound Manager.



From a dialog listing either all SQI or SQM 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 or SQM prefixes.

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

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