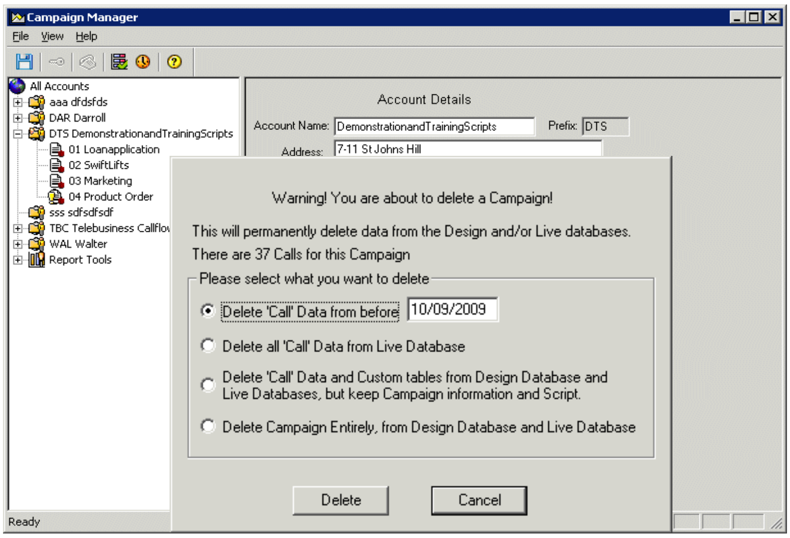
SYNTHESYS CAMPAIGN MANAGER

Setup - Reports

Managing Reports and Report Schedules

Managing Accounts & Campaigns



Software Release Version 4.4

Document Version: 1.0

Last updated April 2015

Prepared by Brigitte Reimer

CREATING & MANAGING REPORTS

OVERVIEW **7**

How Synthesys Works 7

CAMPAIGN EDITOR BASICS **8**

Good Callflow Design 8

DATABASES & SQL **9**

The Synthesys Database Structure 10

The Synthesys Data Model 10

The 'Sequence_ID' 10

Custom Tables 11

REPORT TOOL - CRYSTAL REPORTS **12**

Introduction 12

Set up - Database connections for Crystal 13

Creating reports: Adding tables 15

Joining the tables: 16

Setting filters 17

Instant Reports 18

Adding Report Details and Schedule 19

Using Emails with Crystal Reports 20

Requirement for HTML Reports in Crystal Version 9 21

THE SYNTHESYS CAMPAIGN MANAGER **24**

Introduction 24

Account View 25

Campaign View 25

Report View 26

ADDING NEW REPORTS **27**

USING THE REPORT WIZARD **28**

Entering a Name for the Report 28

Report Output Type 29

Specifying Email Details 30

Entering Fax Details 31

Export to File 32

Print 32

SETTING UP REPORT SCHEDULES **33**

Setting Schedule Start & End Dates.....33
Setting a Frequency for Report runs.....34
Timed Report Runs.....35
Event Driven Report Runs.....36
Passing Parameters to the Report.....37
Schedule Summary.....37
Schedule View.....38
Report Run List View.....39
Report Run Maintenance.....39
Schedule List View.....40
Parameters.....40
Report Services Parameters and Formats.....41
Report Formats Summary.....50
Report Tools.....50

REPORT SERVICES.....51

CREATING HTML EMAIL REPORTS.....54

Entering Email Information.....54
Adding Attachments to HTML Emails.....55
Creating HTML Email Reports.....56
Creating Instant Report Schedules.....57
Editing an HTML email report.....57
Example of an HTML Email.....58

THE SYNTHESYS EXPORT WIZARD.....60

FLAT FILE EXPORT.....62

EXPORT TO A DATABASE TABLE.....66

EXPORT TO AGENT DASHBOARD.....72

EXPORT TO UPDATE CRM FIELDS.....75

TROUBLESHOOTING.....78

MANAGING ACCOUNTS AND CAMPAIGN 80

Renaming Accounts and Campaigns 81

Auto Archive Option 82

Re-Setting A Synthesys Session...83

Assign Telephone Numbers to Campaigns 84

Remove Intermediate Versions 85

Deleting Accounts 86

Deleting Campaigns..87

Options for Deleting Campaigns 88

Deleting Reports and Schedules..91

DIAGRAMS OF DATA MODULE 93

OVERVIEW

This document is for people who need a broad understanding of Synthesys, from Callflow Design to producing reports. Areas covered include:

- Basic Callflow Design, though this is covered in more detail in other documents
- How the Synthesys database is structured
- How and why tables are created, how tables are named
- How the Campaign Manager is used in conjunction with the Report Service and how Reports can be produced using third party report tools, for example Crystal reports.

How Synthesys Works

- Synthesys is a complete Call Centre Software solution. The stages in the life-cycle of a call-centre telephone campaign are as follows:
- The customer and Account Manager agree on a 'call flow' - what questions the call-centre operators are to ask the callers and what reports will be required and how often they will be produced.
- This information is converted to a Synthesys 'Callflow' which is a logical representation of the 'flow' of the telephone call. This is done using the first Synthesys tool, the 'Campaign Editor'. (Every time a call is taken for this customer the same Callflow is followed.) When a Callflow is saved, the Designer automatically creates tables in the Synthesys database, which will later be used to store all of the information taken during a call.
- The Callflow is tested and the Reports are designed using a Report tool (e.g. Crystal reports).
- Before the Callflow goes 'live' the Reports are scheduled to run at pre-determined times (e.g. daily at 9am, or weekly) using the Synthesys 'Campaign Manager' tool
- The Callflow goes 'live' and Operators take calls using another Synthesys tool, the 'Agent Workstation'. When a call is completed, the 'Transaction Service' adds the call (Call Run) information to the appropriate database tables.
- Calls are taken and reports printed for the lifetime of that Campaign.

Good Callflow Design

A few points to bear in mind when designing Callflows:

- 1.Use ***Call Results*** to distinguish the different types of calls that you have.

- Call Results are used to classify the nature of the different types of calls in your Callflow. For example: you may have a Callflow that has a different call path for a 'Brochure Request' and for a 'General Enquiry'. Similarly a Callflow may have a 'Message Taken' flow and a 'No Message Taken' flow. You may wish to report on the different types of calls in different ways. In that case it would be useful to use Call Results to distinguish between the nature of the call. You will see this later when you come to designing reports. (Note: - it is essential to use call results if you are using 'instant faxing').

- 2.Use ***Subflows*** to avoid repeating information in a Callflow.

- Subflows have many benefits, I mention but a few. They improve the appearance and readability of your Callflow and help stop your Callflow looking cluttered. Also from a reporting point of view they are very useful and can make reporting much easier. This is because in a subflow the data is stored in one database table instead of being spread over many database tables. Suppose we ask the caller where they saw our advertisement in different parts of the Callflow. If this information were taken in a subflow then report on it would be much easier as you will see later.

- 3.Use Meaningful names for Sections and controls

- The names of your controls and sections go into making up column names in the database tables and so if they are meaningful (i.e. the name *Address* an address control) it will make writing your reports easier.

- 4.Do not use long names for sections/subflows/controls.

- The names of your controls and sections etc go into making up the names of database tables and column names. Since some applications do not support database column names of over 32 characters it is advisable to keep the length of such names to a minimum.

- 5.Keep it simple!

- Try and make the Callflow as simple and concise as you possibly can. This will make maintaining your Callflow easier as well as keeping the length of your calls to a minimum. It will also make reporting easier.

4.2 Introduction to Databases & SQL (plus Tables & Columns)

Synthesys uses a relational database to store telephone call (Call run) information.

In a relational database, all data is held in tables, which are made up of rows and columns. Each table has one or more columns, and each column is assigned a specific data type, such as an integer number, a sequence of characters (for text), or a date. Each row in the table has a value for each column.
A typical fragment of a table containing employee information may look as follows:

Emp_ID	Emp_Surname	emp_fname	Department_ID
10057	Smith	Fred	7
10693	Donaldson	Anne	3

The above table may be called 'Employee'. It has 4 columns and currently 2 rows of data.

The concept of 'Relational Databases' means that tables can be related to each other. For example the above table has a column called department_ID. This relates to another table called Department, which holds information about other departments. So we can look-up information about department '7' for instance.

In order to uniquely identify a row in a table, a column can be defined as a Primary key. This ensures that no two rows in the table can have the same Primary key value. In the above example, the column Emp_ID could be defined as being the Primary Key.

Relational databases use a special language called 'SQL' to create tables, and to add, delete and view data. In order to create reports it is necessary to understand what tables, rows and columns mean. Synthesys was designed so that a user does not require any knowledge of SQL, however a basic knowledge can give you quick access to viewing your data.

Synthesys commonly uses 'Sybase SQL Anywhere' for its relational database. 'SQL Central' can be used to connect to the database, & from there all you the tables within the database can be seen.

The simplest SQL statement to look at the data in tables is the 'SELECT' statement, e.g.

```
SELECT * from Employee
```

This will show you all of the 'rows' of data in the 'Employee' table. The '*' is a wildcard character which means that you want to view all of the columns in this table.

The Synthesys Database Structure

Synthesys uses two databases:

Phoneyx - the design database, where tables are initially created by the Campaign Editor.

Phoenix - the 'live' database. When a Callflow is released, the tables created in Phoneyx are copied into Phoenix. All of the 'Call Run' data is only stored in Phoenix.

There are two types of table in the Synthesys database:

Custom tables: created by the Campaign Editor - see next section.

Phoenix stock tables: a core set of tables used to define the Synthesys database.

Every installation of Synthesys has the same set of stock tables, all of which begin with 'Phoenix_'. Both Phoenix & Phoneyx have the same Stock table definitions, although only Phoenix contains any telephone call data.

(There are also System tables, which belong to the database itself and should not be touched)

The Synthesys Data Model

The stock tables and their relationships are represented in the section: Diagrams of Data Model.

Every time a Callflow is run through the 'Agent Workstation' the Transaction Service will add a row into the **Phoenix_Statistics** and **Phoenix_Event** tables.

If the Call Run is not aborted then rows will also be added to the **'Main' Custom table** and **other Custom tables** (see next page).

The 'Sequence_ID'

The most important table is the Phoenix_ Statistics table. This table contains a record of every Call Run in the system and the main events related to the call. There is one row in the Phoenix_ Statistics table for every Call Run, each row being uniquely identified by the 'Sequence_ID' column. The Sequence_ID is the Primary key for this table.

Custom Tables

Once a Callflow has been released, the Campaign Editor will have created the database tables in the Phoenix database used to store all of the call data. These tables are the 'Custom tables'.

There are certain naming conventions for custom tables that it is helpful to know about when designing Callflows (see 'Good Callflow Design' above). Custom tables all begin with the same Prefix, which is made up from the three characters Account, prefix e.g. DGV (all Campaign belong to an Account) plus the two digits Campaign Prefix for this Campaign (i.e. the nth Campaign for this Account) e.g. 02. So all Custom table-names for this new Callflow will begin with "DGV02_".

The first table created by the Campaign Editor is always the "Main" table. This contains this first bit of information in the Callflow and in our case will be named "DGV02_Main". The Main table's first columns are always:

Sequence_ID	as in the Phoenix_Statistics table
Event_Date	the date the Callflow was run
Event_Time	the time the call was taken

The remaining columns in this table depend on the design of the particular Callflow.

Other Custom tables are also created, all with the Sequence_ID as the first column in the table. The number of custom tables produced depends on how the Callflow is designed.

In general, the Campaign Editor will create one table for each 'path' in the Callflow in order to group related pieces of information together.

The Campaign Editor will create a new table for each 'Branch' in a Callflow. So if our sample Callflow has a branch for 'Order' and another for 'General Enquiry', then two tables will be created, one called DGV02_General_Enquiry, and another called "DGV02_Order.

A separate table will be created for each Subflow also, as each Subflow contains the same information.

Column Names

Column names are created with similar naming rules. The name of a column is defined as:

<Section_Name>_<Control_Name>_<Item_Name>

So a section called 'Details' with a 'Name' control in it will have the following columns:

Details_Name_Title
Details_Name_FirstName
Details_Name_Initials
Details_Name_Surname

REPORT TOOL - CRYSTAL REPORTS

Introduction

Crystal Reports is a reporting package that can be used to create reports on the calls taken by Synthesys.

People with little or no experience of databases & report writing can quickly and easily create professional reports using Crystal Reports.

Reports are usually saved on the Server in the Synthesys\Reports folder. A separate folder is created below the reports folder for each Campaign. Crystal reports have a '.rpt' file extension.

Set up - Database connections for Crystal

Customers must purchase Crystal Reports Developer Edition and install it onto the server.

Crystal 8.5:

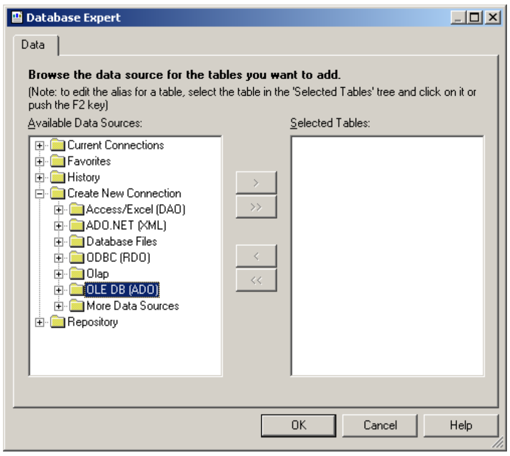
When designing reports customers must use the CrystalPhoenix ODBC.
This ODBC must use Windows Authentication to connect to the database on the server. If this is not done any scheduled reports will fail, as the Crystal Service cannot log into the database. The ODBC must also be on any design workstations but does not have to use Windows Authentication.

Crystal 9

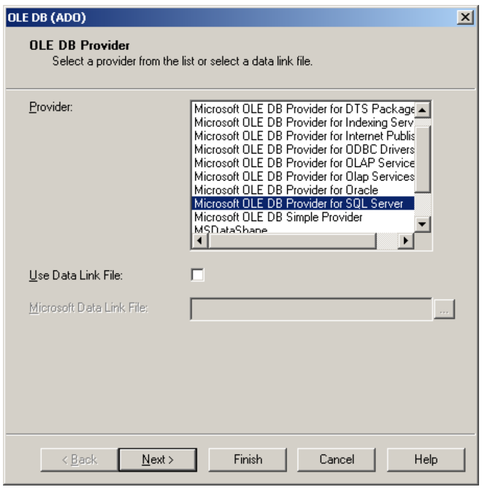
You can use Phoenix ODBC there is no need to use CrystalPhoenix

Crystal 10

For Crystal 10 you may need to use OLE DB(ADO) connection type.

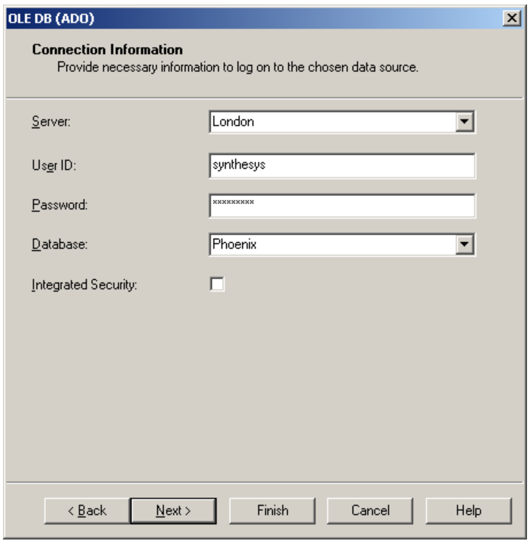


Select Microsoft OLE DB Provider for SQL Server



Fill in the details as requested.

Server is you SQL Server
Database is Phoenix

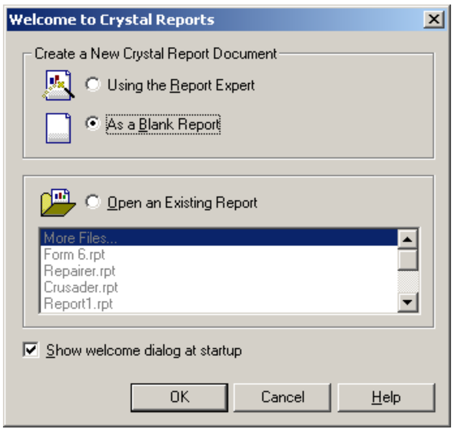


Press Finish

Creating reports: Adding tables

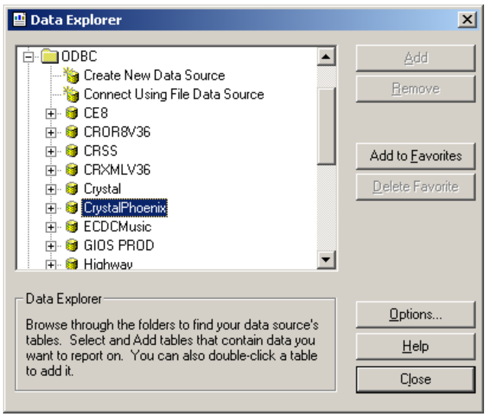
In order to add tables to your report the first thing to do is make a note of the campaign prefix you wish to base your report on.

The first screen will prompt you to select a ‘report expert’ or a blank report.

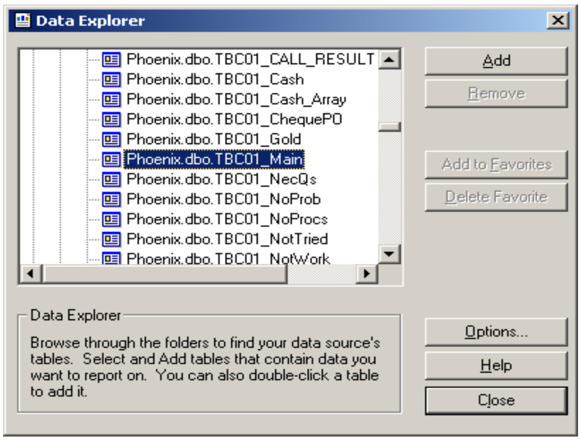


We will select a blank report.

You must then select your database connection (See page 11 for the Synthesys database connection option).



Now select your tables, by highlighting the relevant table and pressing ‘Add’, repeat this until all tables are added and press ‘Close’.

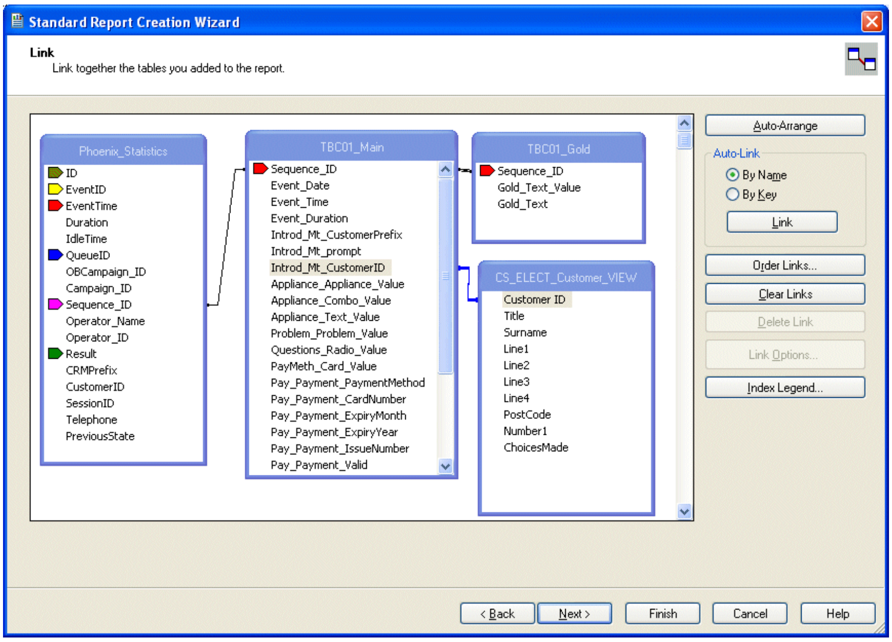


Joining the tables:

- The Main table from the script is joined to the Phoenix_Statistics table via the Sequence_ID. NB You may receive a field length warning when making this join, just press OK it will not affect the running of the report.

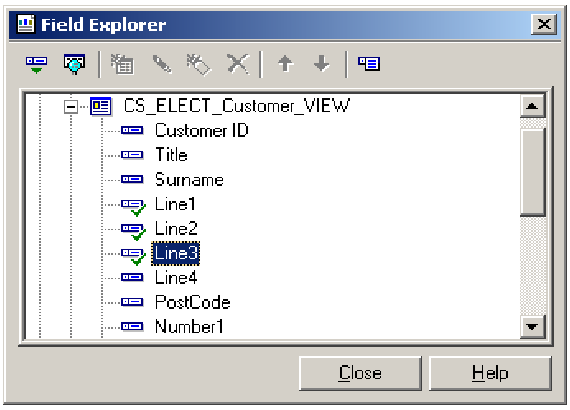
- The Main Table is joined to the CRM via the customer ID.

- The Main Table is then joined to any 'branch tables' or Subflows via the Sequence_ID. N.B Any joins to Branch Tables or Subflows must use a Left Outer Join. This is set by right clicking on the join and selecting options then select Left Outer.



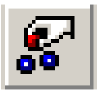
When all joins are made, press OK. N.B To return to this screen from the report select 'Visual Linking Expert' from Database drop down menu on toolbar.

In the field explorer select the fields you would like in your report by double clicking on the field and dragging and dropping onto the report, repeat this process until all fields are added.



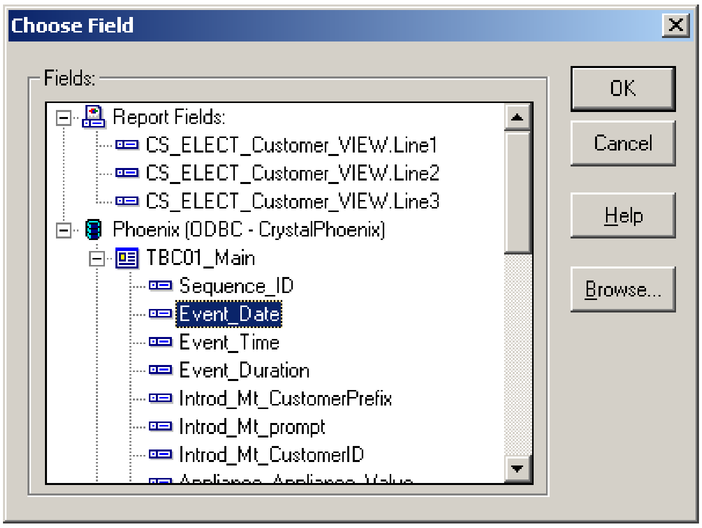
Setting filters

In order to set a filter on your report you must use the ‘select expert’ from the toolbar.

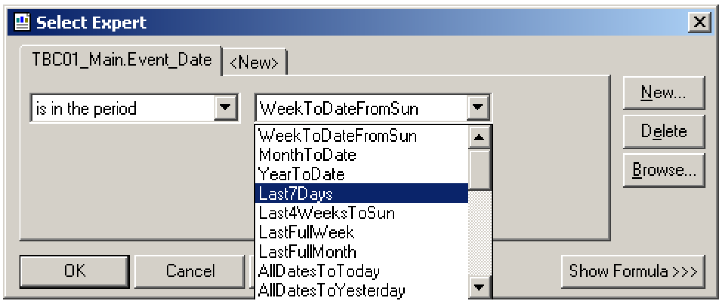


You will be presented with a choose field dialogue; select the field you wish to base your filter on.

N.B if you wish to filter on a text field it must be **less** than 255 characters.



You can now give the report the criteria you wish to filter on in this instance we want to see calls in the past 7 days.



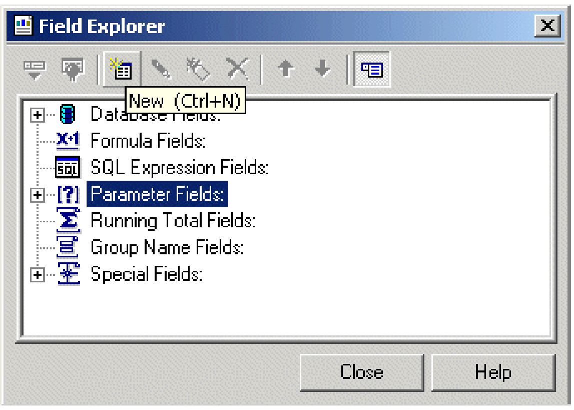
From the left hand drop down you select the variable; from the right hand drop down select the condition.

This will now present calls from the database for the last seven days only.

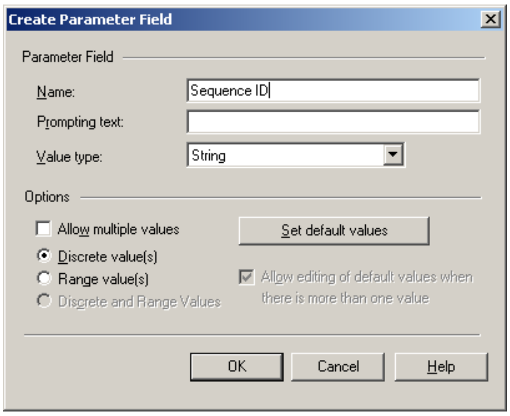
Instant Reports

In order to run an instant report, which is a report than runs immediately after a call has been taken and only shows the data for that call, such as an email or a fax, we need to base our filter on a parameter field.

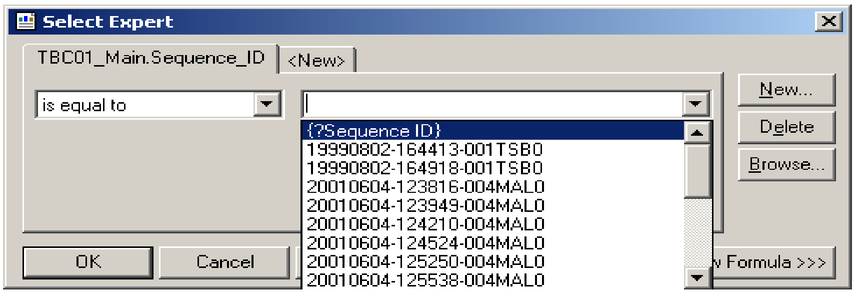
In order to create a parameter field, select ***Parameter field*** from the field explorer and select *New.*



Give the field a relevant name and press OK.



Return to the select expert and create a filter based on the Sequence_ID from the Main Table, and set the variable to ‘is equal to’ and the condition to ‘(?Sequence ID)’ and press OK.



The report will only return data for a specific sequence ID, which Synthesys will pass to it at the end of the call.

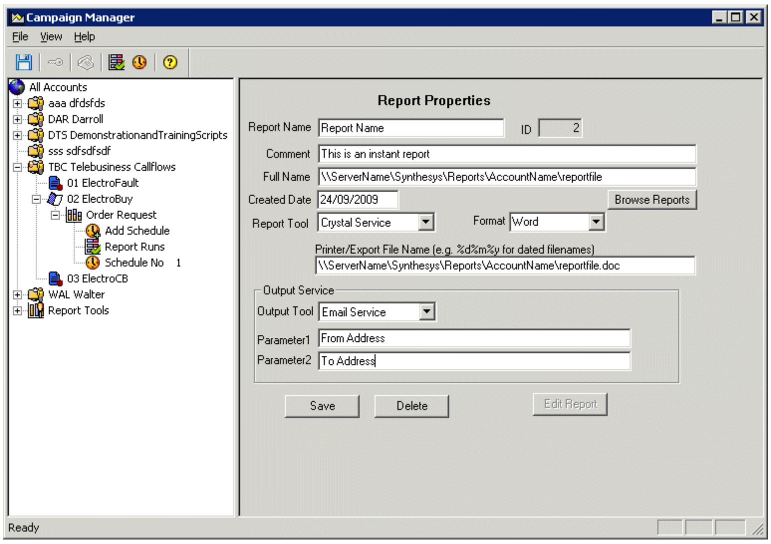
Adding Report Details and Schedule

Now the report is ready, save it in the reports directory, under the relevant account, on the Synthesys Server. For Synthesys to automatically run the report, report details and a report schedule need to be set up in the Campaign Manager.

To open the Campaign Manager:

- Click on ***Reports*** under the **Setup** heading of the Synthesys main screen.

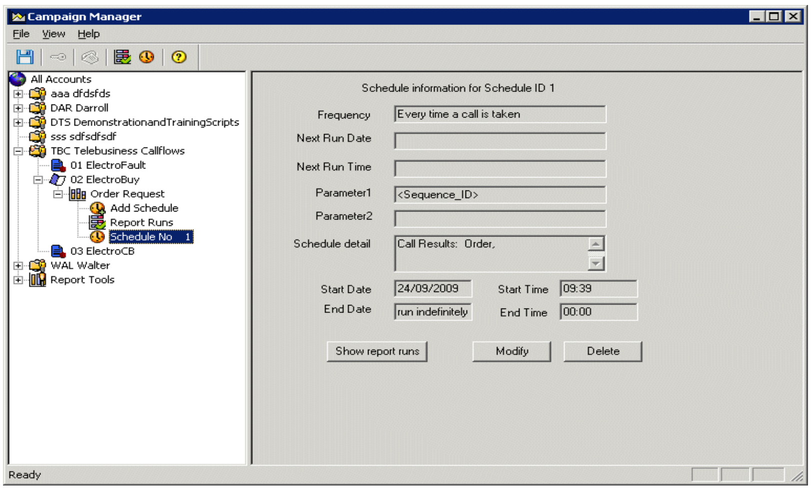
- To add a report to your campaign, right click on the relevant campaign and select ***Add New Report*** or **Report Wizard** from the drop down menu.



With Microsoft Exchange 2005, the 'from' email address in Campaign Manager needs to be entered with an alias name: Kim Constantine<Kim.Constantine@noetica.com>

Next, add a schedule for the report using the Schedule Wizard.

- Enter a start/end date for your report, the frequency for the report run (for instant reports select ‘Every time a call is taken’) and other details as required.



Using Emails with Crystal Reports

Email service putting reports into the body of an email

The email service allows Crystal reports to be placed into the body of the email. In order to do this the following needs to be done.

a. The report output must be either Text or HTML.
b. The output parameter must be suffixed by " /BODY"
   i.e. "//server/folder/reportname.txt /BODY"

NOTE: Please ensure that there is a space before the forward slash and body (/BODY).

2. Email Service - Attaching miscellaneous files to an email

Files can be attached to Synthesys emails by adding the following text to the Printer/Export filename when setting up a report:

<Attach:d:\Myfile.txt>

This is in addition to the usual printer name or export filename.
E.g.:

- \\jellybean\d\Synthesys\Reports\JON\Report2.html /BODY <Attach:D:\myfile.txt>

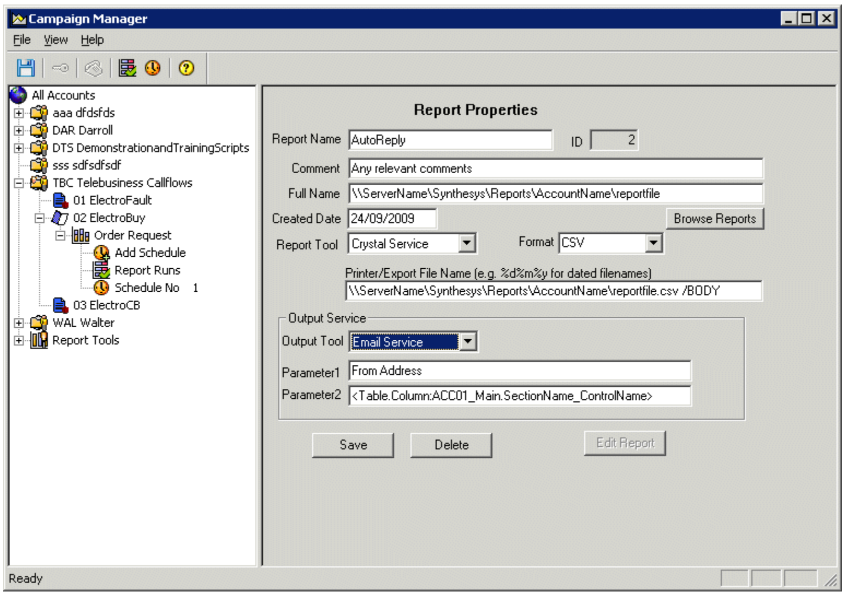
If the /BODY parameter is used, there will be one file attachment, and the report will appear in the body of the email.
If the /BODY parameter is not used, there will be two attachments – the report attachment and the specified file attachment.

The attachment facility can be combined with the database column facility, whereby data from the Phoenix database is inserted into a report parameter using the '<Table.Column>' method. Here a filename contained in the database can be used as the attachment filename. (Note: for instant reports only)
E.g.:

- D:\Synthesys\Reports\Report2.html <Attach:<Table.Column:CAL05_Main.b_Tel_number1>>

And a different value will therefore appear for every report run, and this is the information the Email Service will use when emailing the report. Displaying Report-run information for this could show the following:

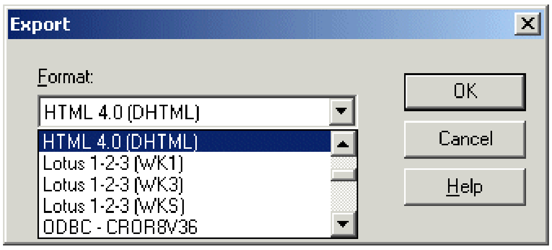
- \\jellybean\d\Synthesys\Reports\JON\Report2.html /BODY <Attach:D\anotherfile.txt>



Requirement for HTML Reports in Crystal Version 9

If you wish to use the HTML option to send out your reports, you initially need to install the required software.

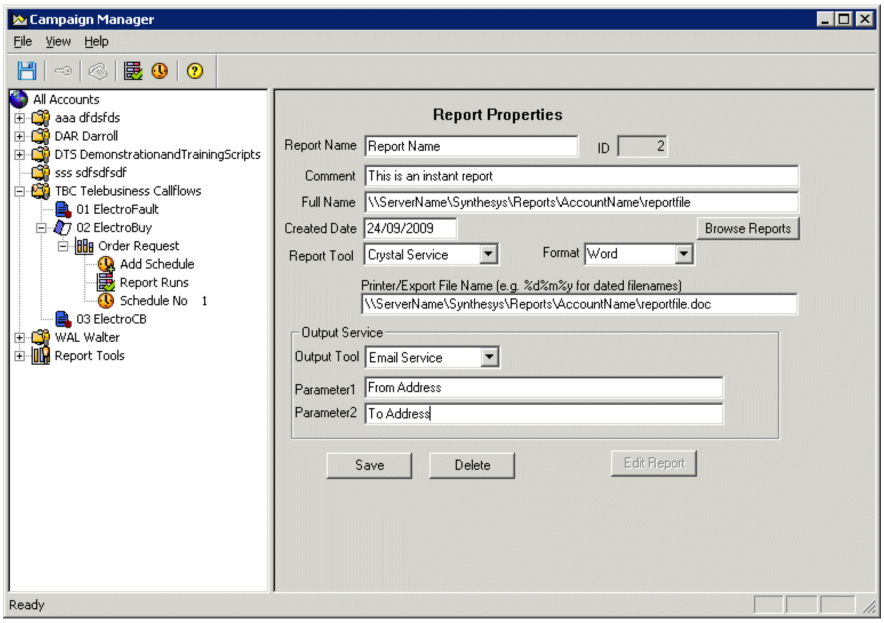
In Crystal report, go the Export  icon on the Standard Toolbar and in the Export window now displayed; select HTML 4.0 (DHTML) from the drop down menu.



On clicking OK the required software will be installed automatically.

SYNTHESYS CAMPAIGN MANAGER

Report Details



Report Schedule

THE SYNTHESYS CAMPAIGN MANAGER

Introduction

To open the Synthesys Campaign Manager:

- Click on ***Reports*** under the **Setup** heading of the Synthesys main screen.

The Campaign Manager is a tool for modifying details of accounts and campaigns, scheduling reports, and viewing report run histories.

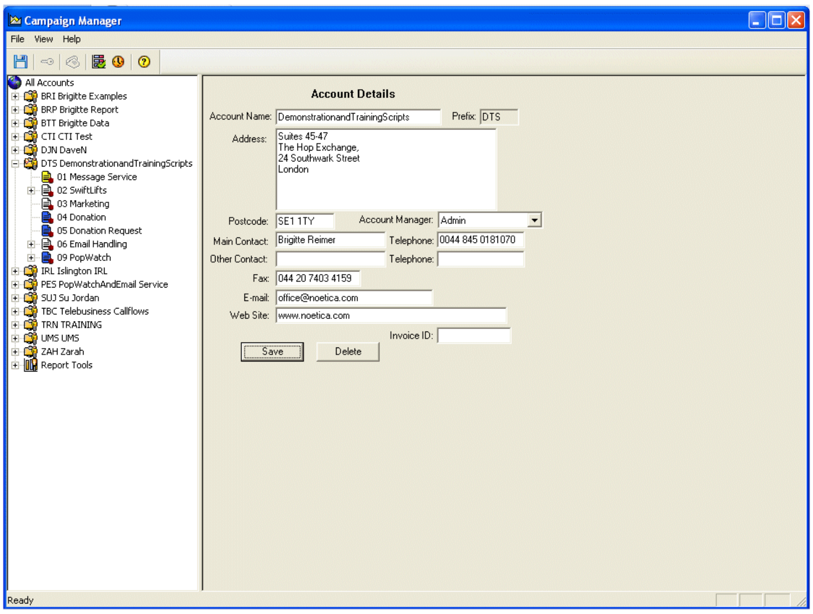
Reports are created using a Report Tool such as Crystal Reports. The user can then use the Campaign Manager to set up automatic running of the report. The Campaign Manager is invoked from the Synthesys Workstation Screen. A Tree-View of All of the Accounts and Campaigns is displayed with options of adding Reports and Schedules to each Campaign. The information stored by the Campaign Manager is used by the **Report Services** to run the reports

Briefly going back to the Synthesys Database structure, the Campaign Manager uses a number of Stock Database tables to store its information:

Phoenix_Account	holds Account information
Phoenix_Campaign	holds Campaign information for these Accounts
Phoenix_Report	holds Report information for these Campaigns
Phoenix_Schedule	holds Schedule information for these Reports
Phoenix_Report_Run	holds Report Run information about the Reports
Phoenix_Report_Tools	holds information about the report tools used to run the reports.

Account View

If the ***All Accounts*** icon is expanded, a list of the Accounts will be displayed. Selecting one of these Accounts will display the Account information:

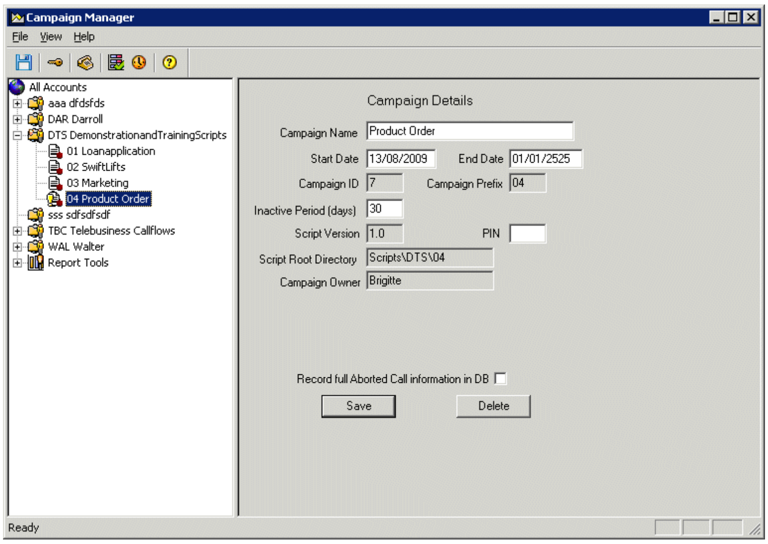


Any of the fields that are not greyed out may be edited and saved.

Every Account and Campaign that has been released will be displayed. New accounts and campaigns are created by the *Campaign Editor* when a new callflow is designed, not in the Campaign Manager.

Campaign View

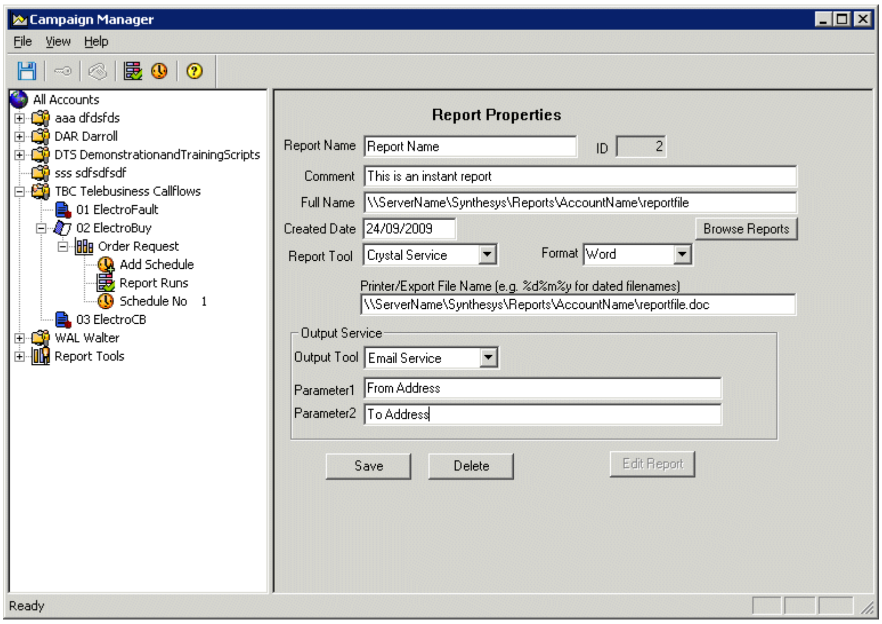
Expanding the *Account* displays a list of the *Campaigns* for this account. Selecting one of these campaigns displays details of the campaign in the right hand pane:



Report View

Expanding a campaign will display a list of reports for the campaign.

This is where you can view or edit report details and add schedules to run these reports automatically. The report itself has been designed and saved as a file using the report tool.



A new Campaign will have no reports set up in the Campaign Manager.

New reports are added using the ***Add New Report*** or ***Report Wizard*** options, which are described in detail on the next pages.

ADDING NEW REPORTS

To use the *Add New Report* option to display a blank report template:

- Click on ***Reports*** under the **Setup** heading of the Synthesys main screen.
- Right click on the campaign and select ***Add New Report***.
- Enter all details, as required into the *Report Properties* section, including.

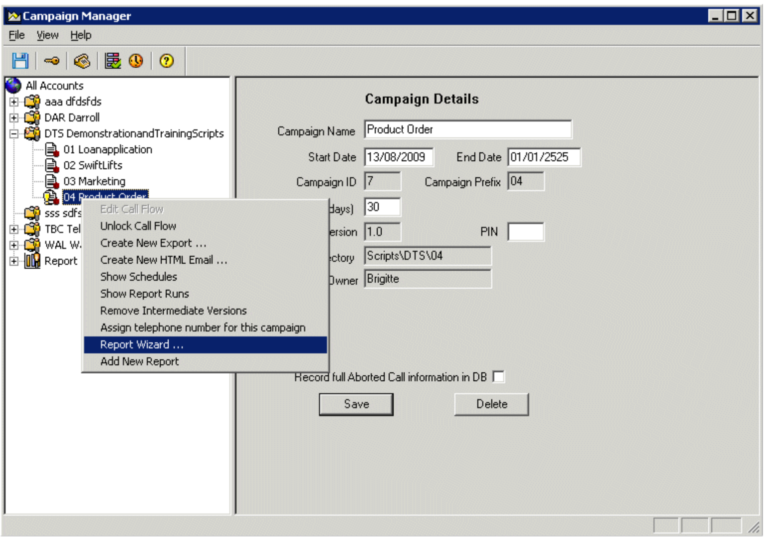
Field	Description
Report Name	Contains any name to identify your report
Comment	Any comment about the report
Full Name	This is the full name of the report. It must include the path and exact name of the report. This is used when the report is automatically run. Use the browse reports button to avoid any typing errors.
Created date	This will default to today's date.
Report Tool	A drop down list of the report tools available on your version of Synthesys. You must select the correct report tool for your report. (A Crystal Report cannot be run selecting Impromptu as the report tool, for example).
Format	The output format of the report, available for the selected tool.
Printer/Export Name	Name of a valid printer (You can check printer names used by other reports) or Export file name - this is only used by download type reports, i.e. reports that need to be saved as data text files. If this is to be used, a filename such as \\c\folder\%d%m%y.txt can be used to create different filenames on different days. This will produce a file called \\c\folder\210599.txt for example. **To send a fax**, you need to enter the name of a **TIF printer**. Reports are then saved as an image and faxed as bit maps.
Output Tool	Select an Output Tool e.g. Fax Service if the report is to be faxed or Email Service to send it as an email. The output format from the Report Tool must be compatible with the format used by the Output Tool. If no Output Tool is required, leave this field as <none>.
Parameter1 & 2	Parameters for the Output Tool. **To send Emails**, enter the **senders email address** (from Address) into the **Parameter1** field. With Microsoft Exchange 2005, the 'from' email address in Campaign Manager needs to be entered with an alias name: Kim Constantine<Kim.Constantine@noetica.com>. The **recipients email address** is entered into the **Parameter2** field. For multiple recipients separate the email addresses with a semi-colon (**;**). **To send a Fax**, enter the **destination fax number** into the Parameter1 field and into the Parameter2 field enter the name of the recipient.

Clicking the ***Save*** button will add this report underneath the current Campaign.

USING THE REPORT WIZARD

To add a new report using the ***Synthesys Report Wizard*** to guide you step by step through the process of setting up the report and report schedule:

- Click on ***Reports*** under the **Setup** heading of the Synthesys main screen.
- Right click on the campaign for which you want to run the report and select **Report Wizard** from the drop down menu.



Entering a Name for the Report

Use the first page of the *Synthesys Report Wizard*, to enter a name to identify your report.

Selecting the Report Tool

Next, you select the Report Tool used to create your report. A drop down list shows the report tools available on your version of Synthesys. Ensure that you select the correct report tool for your report, i.e. Crystal Service for a Crystal Report.

Then, you enter the full name of the report, including the path and exact name of the report, so that the report can run. You can use the *Browse* button to select the file name and path, to avoid any typing errors.

The report tool is selected using the drop down menu.

The *Browse* button is used to select the file name and path.

Report Output Type

You now need to select *the Report Output Type* from the drop down list, for example select Fax, if the report is to be faxed, or Email, to send it as an email.

Specifying Email Details

If you select Email as the Report Output type, the next page of the Wizard will prompt you to enter the Sender’s e-mail address, the recipient’s e-mail address and any comments that you wish to appear at the top of your email.

With Microsoft Exchange 2005, the 'from' email address in Campaign Manager needs to be entered with an alias name:

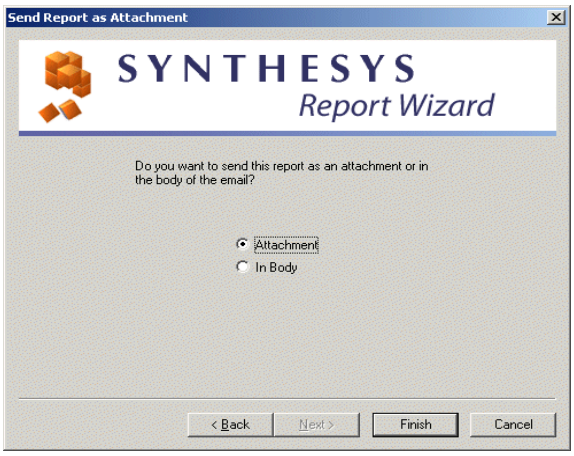
Kim Constantine<Kim.Constantine@noetica.com>

Selecting Output File Name & Format

Next, you select the Output file format from the drop down list. You can send the report, for example, as a text file, HTML, TIF or Excel file etc. The output format from the Report Tool must be compatible with the format used by the Output Tool.

Email Attachment or in Body

You can send the report as an attachment or in the body of the email, clicking either ‘Attachment’ or ‘In Body’.



Clicking *Finish* will move you to the *Schedule* part of the Wizard, where you can set up a schedule for the report run.

Entering Fax Details

If you select Fax as the Output type, the next page of the Wizard prompts you to enter the Sender’s name, the recipient’s name, any comments that you wish to add, and of course the fax number.

You then need to enter the name of a **TIF printer**. Reports are then saved as an image and faxed as bit maps.

Clicking *Finish* will move you to the Schedule part of the Wizard, where you set up a schedule for the report run.

Export to File

If you select Export to File as the Output type, the next page of the Wizard prompts you to select the File format, i.e. CSV, and to enter the location for your export.

Clicking *Finish* will move you to the Schedule part of the Wizard, where you set up your report schedule.

Print

If you select *Print* as the Output type, the next page of the Wizard prompts you to enter a Printer name for this report. Insure, that you enter the name of a valid printer (You may check printer names used by other reports) or Export file name - this is only used by download type reports, i.e. reports that need to be saved as data text files. If this is to be used, a filename such as \\c\folder\%d%m%y.txt can be used to create different filenames on different days. This will produce a file called \\c\folder\210599.txt for example.

Clicking *Finish* will move you to the Schedule part of the Wizard, where you set up a schedule for the report run.

Run Application

If you select *Run Application* as the Output type, the next page of the Wizard will prompt you to enter or browse for the application that you wish to run.

Click *Finish* to set up a schedule for the report run in the Schedule part of the Wizard.

Take no Action

If you select *Take no Action* as the Output type, you can click the *Finish* tab, to move to the Schedule part of the Wizard.

SETTING UP REPORT SCHEDULES

When all report details have been entered, the Report may be scheduled to run in a number of different ways or frequencies. The information saved is used by the Report Service to automatically run and print the report and to re-schedule the report.

The Schedule Wizard will guide you through the process of setting up your report schedule. You can open the Synthesys *Schedule* Wizard at any time from the Campaign Manager, using the ***Add Schedule*** option.

In the ***Schedule Report now*** dialog of the Schedule Wizard:

- Click ***Yes*** to set up a schedule immediately or ***No*** to set up the schedule later.

Setting Schedule Start & End Dates

In the ***Schedule start*** dialog set a start and finish date for your report run:

- Selecting **Immediately** to start your report run straight away or
- **Starting on** to select a start date from the diary page.

To set **a finish date** for your report run, click **Yes, Last run *on*** and select a finish date from the diary page

Or click **No, continue indefinitely**, to run your report indefinitely.

Setting a Frequency for Report runs

In the ***To run at*** page of the Wizard, select how often you want to run your report.

In the '**To run first at**' field, **set** the **Start Time for your report run**.

The available frequencies for your report runs are:

Timed:

Every	Click **Every** and then enter the minutes, hours or days, to run the report at regular intervals.
Specific days	Select this to run your report at specific days of the week. The next page of the Wizard will allow you to select the desired days of the week, e.g. every Monday, or every Saturday and Sunday.
Monthly	If Monthly is selected, the next page of the Wizard allows you to select certain patterns of monthly reports for example the last Friday of Every month, or the first day of every month.
Run once only	To run the report only once.

Event driven:

Every time a Call is taken (Instant)	This is for reports that are to be run immediately after a call has been taken. If selected, the next page of the Wizard gives you the **option to run the report for Specific Call Results only, or for Any Call Result**. For example, you may want to run an Order report, where a customer has placed an order. In this case it is likely that in your Callflow Design, you gave Order Calls a Call Result of 'Order'. Select this call result for this Schedule and the Report Service will only run this report for calls with the call result 'Order'.
Call Tracker 'Print' button	This frequency is similar to Instant, in that it runs reports for one call. The difference is that it is invoked when the 'Print' button is selected in the Call Tracker. If you want Operators to be able to print out a call that they are currently viewing in the Call Tracker, this frequency can be selected.
From a Call Tracker action	Select this option, if you want to run the report when an operator clicks the 'Archive Call' button in the Call Tracker.

Timed Report Runs

On specific days of the week

When you select ***On specific days of the week*** in the *To run at* page of the Wizard, the next page will prompt you to tick the days on which you want to run the report,

e.g. every Monday, Wednesday and Friday.

Monthly

When you select Monthly in the *To run at* page of the Wizard, the next page of the Wizard allows you to define further details,

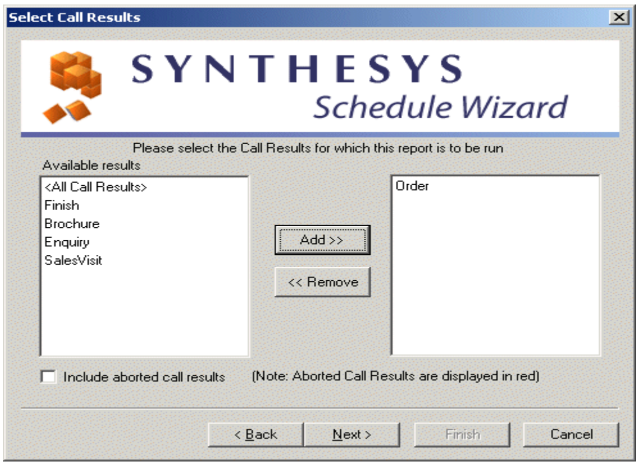
e.g. to run the report on the first or last day of the month, or on a specific day.

Event Driven Report Runs

Every time a call is taken or Call Tracker Print button

To set your report run for any Call Result or for specifically selected Call Results:

- Select **Every time a call is taken** or the **Call Tracker 'Print' button** in the in the *To run at* page of the Wizard.
- In the next page, select the desired Call Result(s) in the ***Available results*** window and use the ***Add>>*** button to move the selected result(s) into the window on the right.



Use the <<Remove button to move the selected result(s) back into the window on the left.

Tick the box, if you wish to include aborted call results.

From a Call Tracker action

To run a report for **specific Call Tracker actions:**

- Select **From a Call Tracker action** in the *To run at* page of the Wizard.
- In the next page, click on the desired Call Tracker action and use the Add>> button to move the selected result(s) into the window on the right.

Use the <<Remove button tab to move the selected action(s) back into the window on the left.

Passing Parameters to the Report

When setting up schedules it is important that the schedule type you pick corresponds to the information retrieved in the report itself. A report scheduled to run once per day should only have data for one day's calls.

In the *Parameters* dialog of the Wizard you can select the required parameters from the list or enter your own parameters.

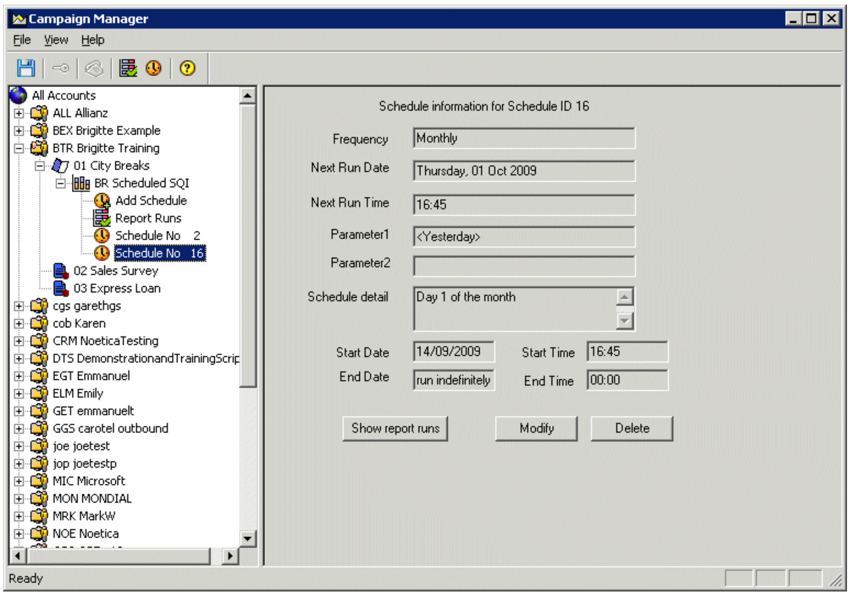
Schedule Summary

The last page of the Wizard displays a summary of your report schedule.

Check that the 'Next Run Date' and 'Next RunTime' fields display the date and time that you expect the report to run on next. Only Instant Schedules will not display a 'Next Run Date or Time' as they can run at any time.

Schedule View

- To **view** details of existing report schedules, click on the relevant ScheduleID.
- To **edit** existing report schedules, select the ScheduleID and click the **Modify** button to open the Synthesys Schedule Wizard, where you can make your changes as required.
- To **add** a new report schedule, click the ***Add Schedule*** option. The Synthesys Schedule Wizard will guide you through the process of setting up your new report schedule.



Check, that the 'Next Run time' field is displaying the date and time that you expect the report to run on next. Instant Schedules will not display a 'Next Run Time' as they can run at any time.

Ensure that the schedule type picked corresponds with the information retrieved in the report itself. A report scheduled to run once per day should only have data for one day's calls.

Parameter1 & Parameter2

These two parameters can be used for passing parameters to the report itself, such as date parameters.

As with report parameters, there are a number of special case parameters that are converted to values when the report is run e.g. <Yesterday> is converted to a date. See **Parameters** section.

Report Run List View

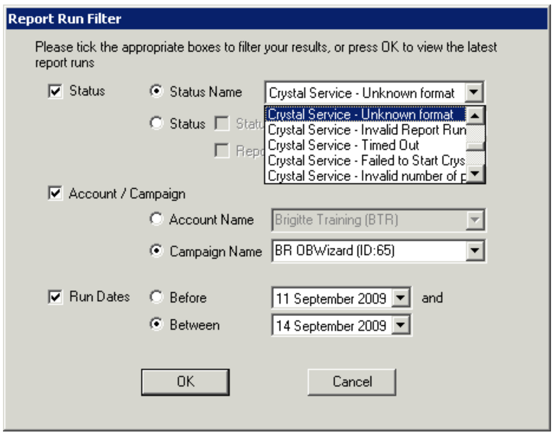
Once a report has been scheduled and has been run by the Report Services, the information about when it ran can be viewed by clicking on the Report-Runs icon. This will display a list of report-runs.

There are two methods for viewing report-runs:

- Report Runs for one Report only. Select the report-runs icon below the report. This will display the report runs for this report only.

Schedule...	Next Run	Account	Report Name	Type	Report Tool
1	10:59AM 16 Sep, 09	Yagna(01)	YAG1 CityBreak	weekly	SQI Service
2	03:11PM 15 Sep, 09	Brigitte Training(01)	BR Scheduled SQI	weekly	SQI Service
3	02:42PM 17 Sep, 09	Brigitte Example(01)	BCityBreak	weekly	SQI Service
4	04:32PM 17 Sep, 09	XYZ OB Test(01)	BR XYZ OBTest	weekly	SQI Service
5	05:21PM 16 Sep, 09	Brigitte Example(04)	CRM Data Import	weekly	SQI Service
16	04:45PM 01 Oct, 09	Brigitte Training(01)	BR Scheduled SQI	monthly	SQI Service

- All Report runs. Select the report-runs icon  from the toolbar. The user is presented with a dialog where they can select to view all report runs, report-runs with a specific status or report runs over a date period.

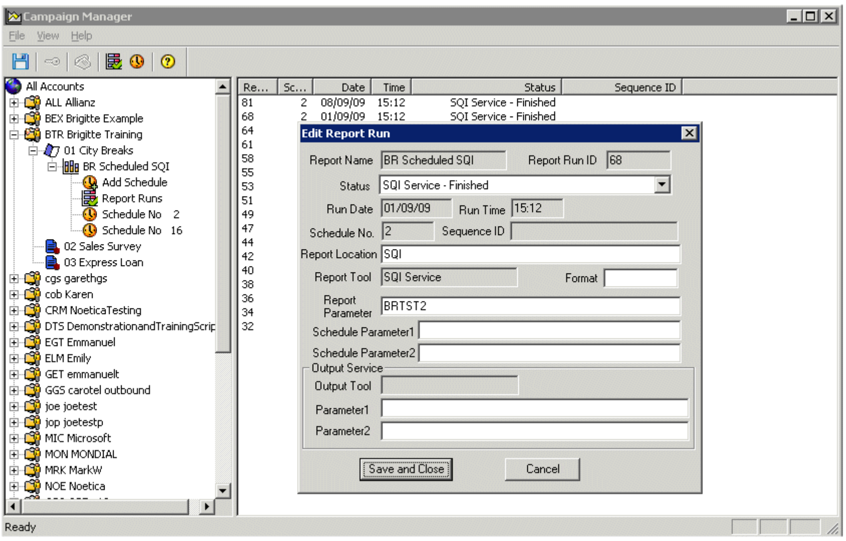


Report Run Maintenance

The Campaign Manager has the facility to view and change report-run information. This is useful when a report needs re-running either because of a report-run error or just to produce another copy of a report.

Right-clicking on a report-run_id allows a user to:

- Edit this report run. The 'Edit Report Run' dialog (next page) is displayed, allowing the user to modify any of the report-run values that may have been entered incorrectly. If the report needs re-running, the status can be changed to 'Action Required'.



- Change Status. The status of reports can be changed here without using the 'Edit this report run' dialog. Multiple Report-run can be selected and all of their statuses changed en-bloc. The status can be changed to 'Cancelled', <Report Service> Action required, <Report Service> Finished, <Output Service> Action Required, or <Output Service> Finished.

Schedule List View

A list of the scheduled reports can be viewed by clicking the ***Schedule*** icon. A list of schedule details will be displayed, including dates and times of next-runs.

The Report-Run and Schedule views can be ordered by any of the headings simply by clicking on the heading that you want, e.g. you can view the Schedules in chronological order, or reports in account order.

Parameters

There are a number of 'Interpreted' fields that can be used in the parameters of Reports and Schedules that are interpreted by the Report Starter Service to produce a different value in the Report-Run entry. The fields to which this applies are:

Field	Area/Table
Printer/Export Name	Phoenix Report
Parameter1	Phoenix Report
Parameter2	Phoenix Report
Parameter1	Phoenix Schedule
Parameter2	Phoenix Schedule

Report Services Parameters and Formats

Report parameters are used to add flexibility to running reports, by allowing certain key words to be substituted for other values when the report runs. The available ‘Interpreted’ fields are:

<Yesterday>

This will put in yesterday’s date into this field. This is useful for daily reports that take a date parameter as a prompt. Putting <Yesterday> (including the angle brackets) into Parameter1 of a schedule, will change the Report_Run Schedule Parameter1 value to the actual date of yesterday when the report was run, e.g. 1999-12-19.

<Today>

The same as above except with today’s date.

<Report_Run_ID>

This will be substituted by the Report_Run_ID i.e. the unique report run number. This is useful for exported files that need a unique name.

<Sequence_ID>

This will be substituted for the unique ‘Sequence_ID’ of a call and can therefore only be used by ‘instant’ reports run for one call only.

<Table.Column:*TableName.ColumnName***>**

This parameter is used to look up a value from a database column. This can only be used for ‘Instant’ reports as the value retrieved is for one row in the database with one Sequence_ID. The value is looked up in the database for this Sequence_ID given the Table & column name.

The format is: <Table.Column:TableName.ColumnName>

NOTE: You need to check the Table and Column Name in the Database.

For example in Campaign Manager under Parameter2

Parameter2 <Table.Column:JON01_Main.one_Text >
could become the value: ‘Hello’

The looked-up value (e.g. ‘Hello’) is added to the report_run information created when the report is run. An example of when this may be used is for entering an email address into the address field when using the Email Service.

% characters

Any fields with a % will be interpreted as dates or times and will be changed to a date or time value depending on the character following the %. The characters that can be used include %d – day of the month (1-31), %y year, %m month (1-12), %h hour, etc. The date displayed reflects the date the report was generated.

E.g. Test%d%y.txt would be interpreted as Test042007.txt

Note: This option is used to save a report as a file on the network. When emailing the report however, the file name will be changed to report run ID.

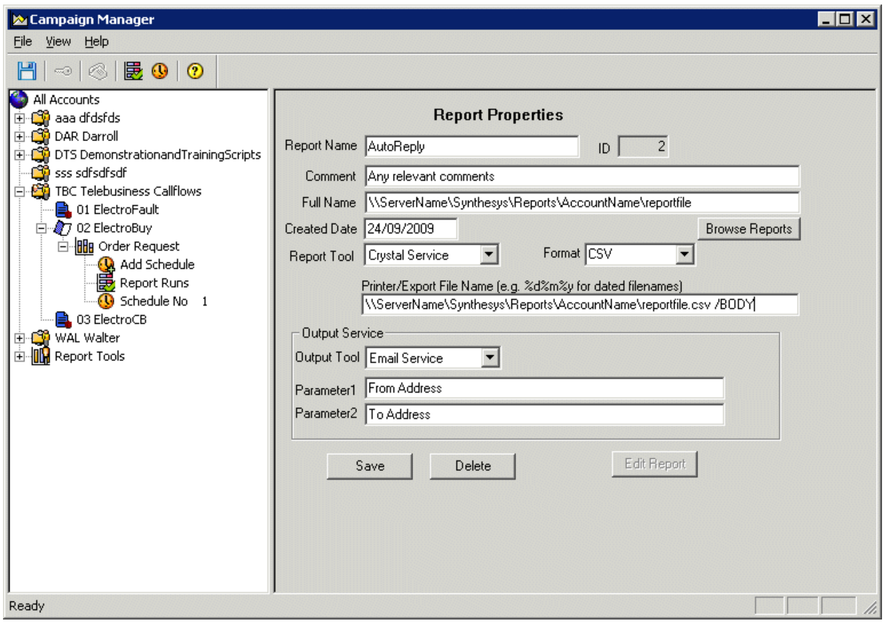
/BODY

The /BODY parameter can be used to put the report data into the body of the email instead of as an attachment. This is available for any 'Text' format report, or Crystal reports with HTML format.

To do this add ' /BODY' to the end of the Printer/Export file name field in the Report Properties.

Ensure that there is a space before the forward slash and BODY (/BODY).

The /BODY parameter is ignored for formats other than Text and HTML.



<NODUP>

Prevents reports from running when a duplicate value is found in a specified field within a given time period.

In certain instances it can be necessary to stop reports being run when a report parameter has the same value as that of a previously run report. For example, it may be desirable not to send an email report to the same recipient twice within an hour of the first email.

The <NODUP:nn> parameter can be used to implement this. The <NODUP:nn> parameter is added (using the Campaign Manager) to the field where duplicates are to be suppressed.

The notation is <NODUP:nn>, where nn is the number of minutes.
E.g. to stop a report running twice for the same sequence_id within an hour, add:

<Sequence_ID> <NODUP:60>

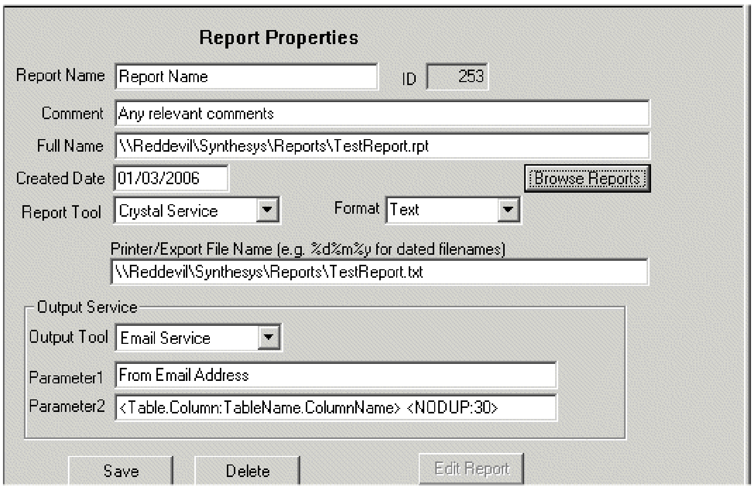
The Report Starter Service checks the reports fields for this parameter. If any reports have run within the specified time that have the same value in that field, the report run status is set to “Duplicate Entry – Finished”. This status is ‘Finished’ rather than the usual ‘Action Required’, so the report will not run.

<NODUP> can be added to the following fields:

Full Name	(Report Properties)
Printer/Export File Name	(Report Properties)
Output Service Parameter1	(Report Properties)
Output Service Parameter2	(Report Properties)
Parameter1	(Schedule Properties)
Parameter1	(Schedule Properties)

The Report Starter Service removes the <NODUP> parameter for the Report Run entry. This is done so the report can run using the ‘real’ parameter, e.g. Sequence_ID.

For example:
Report Entry: <Sequence_ID> <NODUP:30>
Report Run Entry: 7f3dad78-1610-4d82-a2bf-dd1ba5718844



Notes:

- The Report Starter Service only checks for duplicates in the field where the <NODUP> parameter is added.
- <NODUP> can be added to more than one field.
- There are no limits on the max/min number of minutes.
- If a report runs with the <NODUP> parameter and encounters a duplicate field entry within the specified time, which also has the status “Duplicate Entry – Finished”, the new run status will still be set to “Duplicate Entry – Finished”.
- <NODUP> is not case sensitive.

<Attach:filename>

Attaching miscellaneous files to an email.
Files can be attached to Synthesys emails by adding the following text to the

Printer/Export filename when setting up a report:

<Attach:d:\Myfile.txt>

This is in addition to the usual printer name or export filename. E.g.:

\\Reddevil\d\Synthesys\Reports\Report2.html /BODY <Attach:d:\myfile.txt>

Note: The filename is relative to the server, not the local machine.

If the /BODY parameter is used, there will be one file attachment, and the report will appear in the body of the email.

If the /BODY parameter is not used, there will be two attachments – the report attachment and the specified file attachment.

The attachment facility can be combined with the database column facility, whereby data from the Phoenix database is inserted into a report parameter using the ‘<Table.Column:TableName.ColumnName>’ method (see above).

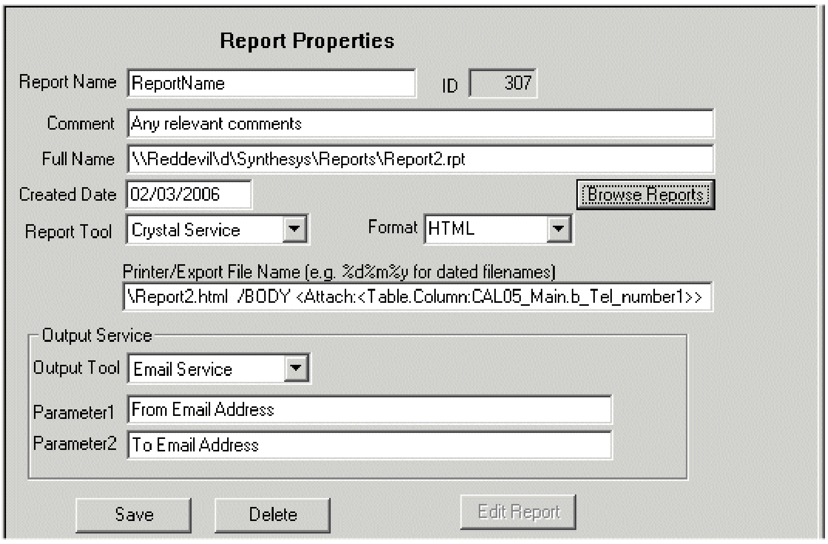
Here a filename contained in the database can be used as the attachment filename. (Note: for instant reports only)

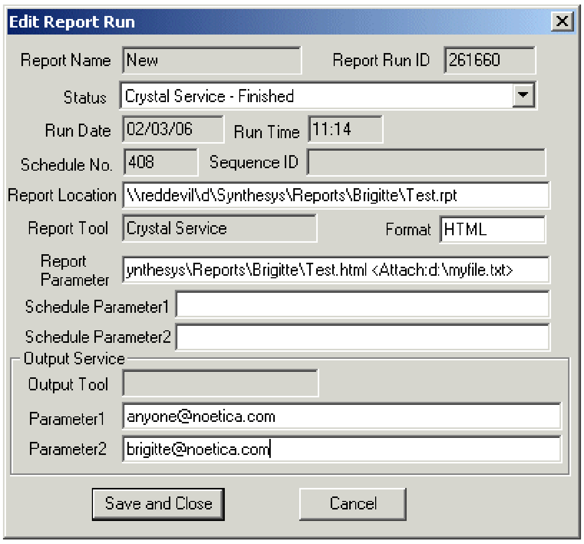
E.g.: D:\Synthesys\Reports\Report2.html <Attach:<Table.Column:CAL05_Main.b_Tel_number1>>

and a different value will therefore appear for every report run, and this is the information the Email Service will use when emailing the report.

Displaying Report-run information for this could show the following:

\\Reddevil\d\Synthesys\Reports\Report2.html /BODY <Attach:d:\anotherfile.txt>





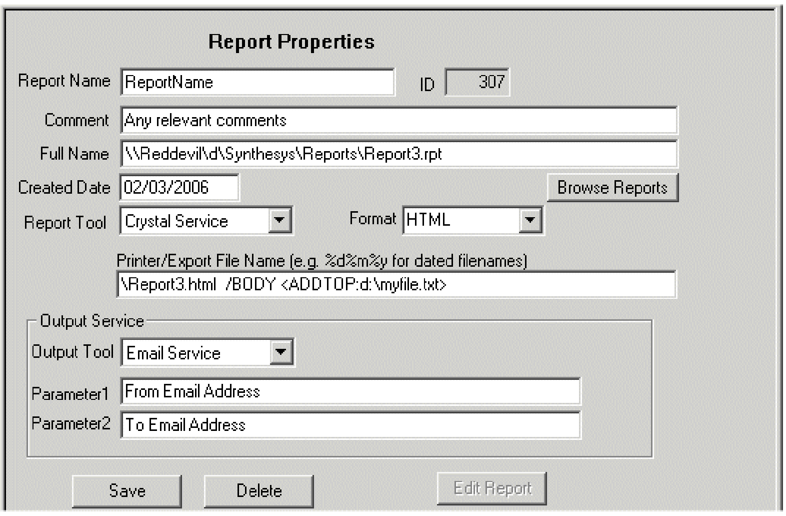
<ADDTOP:filename>, <ADDBOTTOM:filename>

Used by reports using the Email service, these two parameters add values to the top and bottom of email bodies.

E.g: <ADDTOP:\\server\d\myfile.txt>

This will add the contents of myfile.txt to the top of the email. If used in conjunction with /BODY, the top of the email will contain the text from the file, and the remainder of the email will contain the report itself.

Note: The filenames are relative to the server, not the local machine.



Automatic output file naming

Reports that use an Output Service have their output files automatically renamed to the report_run_id so that the file cannot be overwritten the next time the report is run.

For example, if this was not done the following could arise: a report is set up to export to a file called myfile.xls, which is emailed every 30 minutes. If the Crystal Service is running, but the Email Service is stopped for some reason, myfile.xls will be created for report run id 300, for example. The status will remain as “Email Service – Action Required”. The next time the report runs, e.g. Report run id 325, myfile.xls will be overwritten, making it invalid for run 300. When the email service is restarted, the queued report runs of 300 & 325 would both send the same attachment of myfile.xls.

What actually happens is that myfile.xls is renamed to 300.xls for the first run and to 325.xls for the next run, and both of the files are emailed.

Reports that do not use an Output Service do not get their files renamed, (apart from TIF image files).

Emailing Using Aliases / Friendly Names

An email 'Alias' is a friendly name associated with an email address.
Emails can be sent via the Email Service using just the full email address as a parameter, or with an Alias in conjunction with the full email address.

Emailing without an Alias:

Syntax: Person@DomainName
Example: Julie.Smith@context.co.uk

The email address is 'Julie.Smith@context.co.uk'.
This email would be sent to Julie.Smith@context.co.uk and would arrive addressed to Julie.Smith@context.co.uk

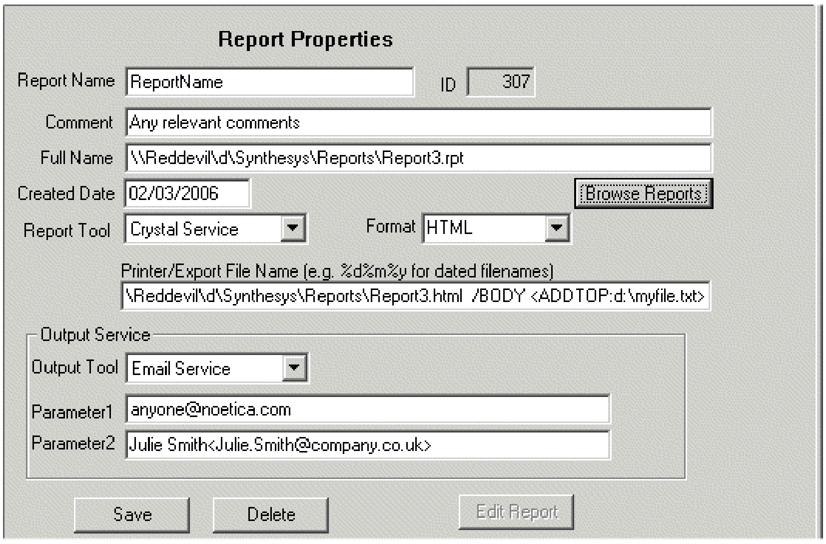
Emailing with an Alias:

Syntax: Alias Name < Person@DomainName >
Example: Julie Smith<Julie.Smith@context.co.uk>

The Alias here is 'Julie Smith' and the email address is 'Julie.Smith@context.co.uk'.
This email would be sent to Julie.Smith@context.co.uk and would arrive addressed to 'Julie Smith'.

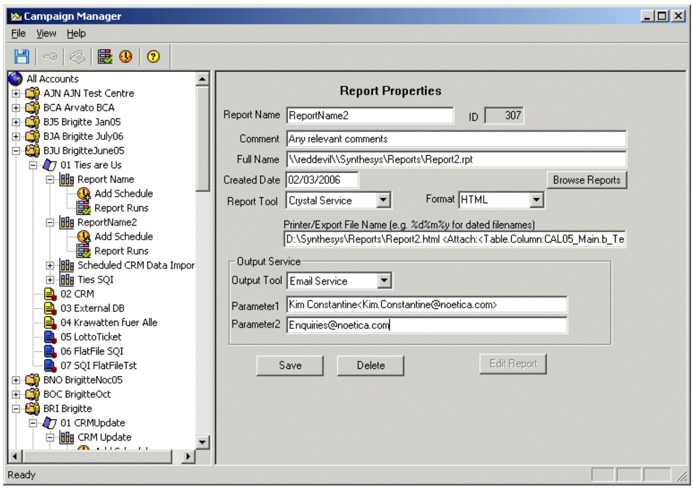
Note:

- When Aliases are used, the email address must be enclosed in Angle brackets (<>).
- The friendly name can include commas, spaces and quotation marks, but not angle brackets.
- The above rules apply to both Sender and Recipient addresses.



Requirement for Microsoft Exchange 2005

With Microsoft Exchange 2005, the 'from' email address in Campaign Manager needs to be entered with an alias name:
Kim Constantine<Kim.Constantine@noetica.com>

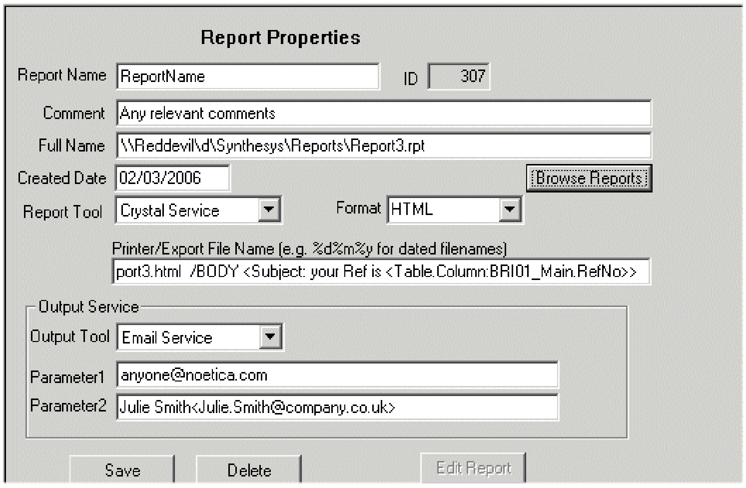


Email Subject

It is also possible to put information from the callflow into the subject of an email. This can **only** be used for **Instant reports**.

<Subject:enter any text you want in the subject field here<Table.Column:enter the field from the database you want to use here> and any extra text here followed by>, i.e.

<Subject: Thank you for your call your reference number is <Table.Column:BRI01_Main.refno>>



Impromptu reports in HTML format

When Impromptu saves a report in HTML format, it produces a number of HTML files. The name of the HTML file should be saved in the Campaign Manager in the Report Parameter field with full path.

e.g. **\\server\d\synthesys\reports\aCampaign\areport**\MyReport.html

this will create an HTML file called MyReport.html (plus other related files) in the \\server\d\synthesys\reports\aCampaign\areport folder. It is advisable to specify a folder to be used solely for the particular report, e.g. synthesys\reports\aCampaign\report1\daily.html.

Emailing Impromptu reports with HTML format

Due to the number of HTML files produced by Impromptu for a report, Synthesys overrides the filename specified by the user and publishes the report directly to a unique folder for each report run according to the report run ID, e.g. folder **\\synthesys\spool\email\245** for report run 245.

This ensures that when the files are emailed only the relevant files will be sent.

Crystal Reports in HTML format

The name of the HTML file should be saved in the Campaign Manager in the Report Parameter field with full path.

e.g. **\\server\d\synthesys\reports\aCampaign\MyReport.html**

Crystal reports in HTML format only produce one HTML file, so emailed HTML reports created using Crystal are sent as one file.

Report Formats Summary

When setting up a report you can select what format you want the report to be produced in, e.g. Excel or PDF.

Each Report Tool and Output Tool has a different number of available formats.

When an output Tool is used the selected format must be available to both tools used, e.g. it is not possible to fax an Excel file, so Excel will not be available as a format if the Fax Service is used.

Tool Type	Tool	Print	TIF	Text	Excel	HTML	PDF
Report Tools	Impromptu Service	Yes	Yes	Yes	Yes	Yes	Yes
	Exe Service	-	-	-	-	-	-
	Crystal Service	Yes	Yes	Yes	Yes	Yes	Yes
Output Tools							
	Fax Service	No	Yes	Yes (GFI Fax only)	No		
	Email Service	No	Yes	Yes	Yes	Yes	Yes

Report Tools

The Campaign Manager maintains report tool information. Expanding the Report Tools icon at the bottom of the Account list shows the Report Tools. The details of the programs used by Report Tools are recorded here & new tools may be added.

Every Report is run using a Report Tool - software used to run the report, e.g. Crystal reports. Report Tools have a Tool-type of either ‘Report Tool’ or ‘Output Tool’. Reports that require two actions use an Output tool such as Fax to perform the second part of the report run.

REPORT SERVICES

The Report Services are a set of programs that perform the running of reports.

The Report Starter Service checks the ‘Next_Run’ column in Phoenix_Schedule for any Scheduled reports due to run. The Report Starter Service then adds an entry to the Phoenix_Report_Run table with a status of ‘Action Required’, and all of the information needed to run the report, including the Report Tool name.

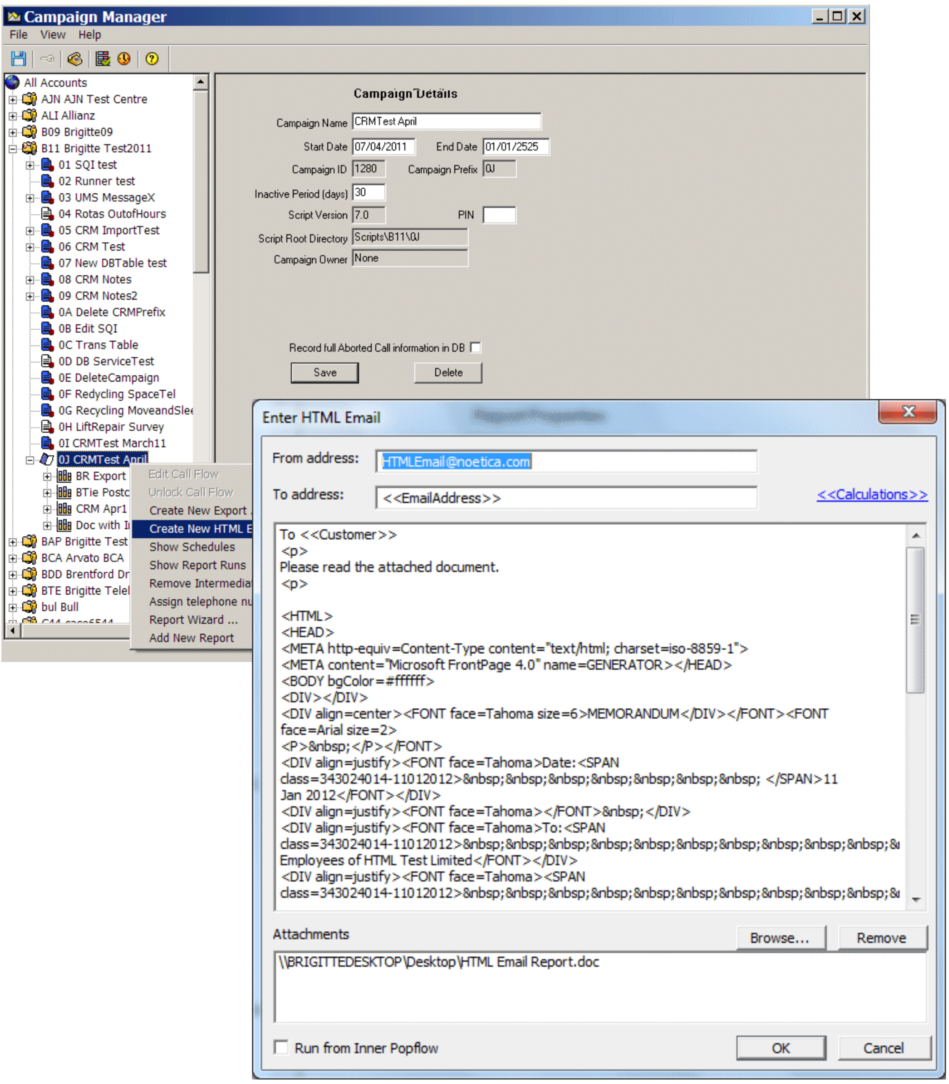
Each of the Report Tools has its own Service to run reports.

These Services check the Phoenix Report Run table for any Report Runs with a status of ‘Action Required’ for its own Report Tool. The Report Service then runs the report & updates the status to either finished, failed (with reason), or an ‘Action Required’ status for an Output Report Tool.

The currently available Report Tools/Services available under Synthesys are:

Tool Name	**Tool Type**	**Purpose**
Impromptu Service	Report Tool	Run Impromptu Reports
Exe Service	Report Tool	Run any executable program
Fax Service	Output Tool	Run Fax reports
Email Service	Output Tool	Run Email Reports
Crystal Service	Report Tool	Run Crystal Reports
Export Service	Report Tool	Run Export Reports
SQI Service	Report Tool	Run Selective Queuing Imports
CRM Import Service	Report Tool	Run Scheduled CRM Imports

HTML EMAIL REPORTS



CREATING HTML EMAIL REPORTS

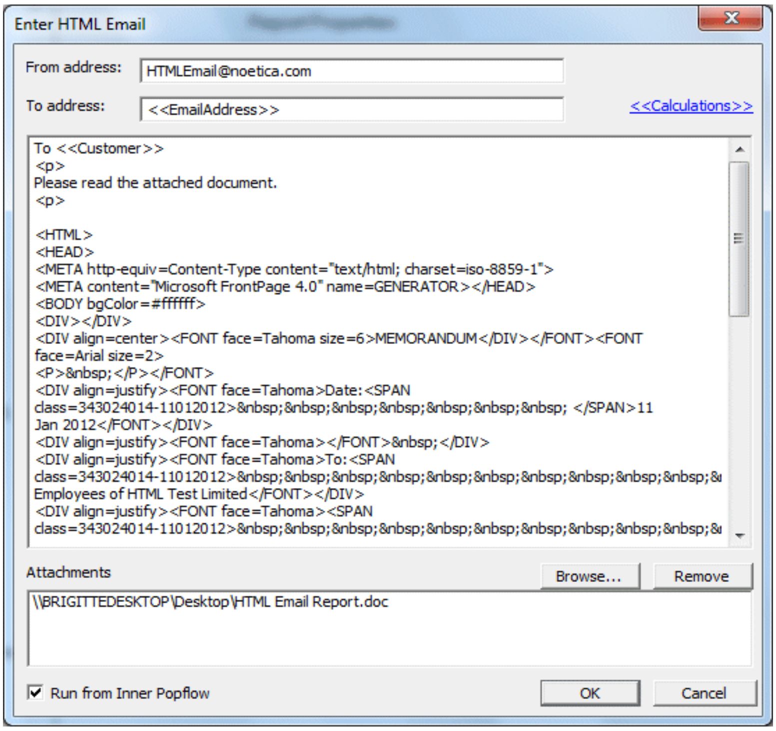
The ***Create New HTML Email*** option enables users to copy and paste or type HTML straight into an edit box and to send details in the body of an instant email:

- Click on ***Reports*** under the **Setup** heading of the Synthesys main screen.
- In the *Campaign Manager****,*** right click on the campaign for which to create the email and select ***Create New HTML Email*** from the drop down menu.

Entering Email Information

In the *Enter HTML Email* dialog displayed:

- Enter **the email address** of the **sender** into the ‘From address’ field.
- Next, enter the **email address** of the **recipient** into the ‘To address’ field, or alternatively use a calculation to pick up the email address of the recipient.



- Into the text box displayed, enter a text message and type or **copy and paste html,** to send text and images.
- To add call information, click the ***<<Calculation>>*** option, enter a name for your calculation and pick details, as required, from the CRM and callflow.
- If you want to send HTML emails from within **Popup scripts** you need to tick the checkbox **"Run from Inner Popflow**".

Adding Attachments to HTML Emails

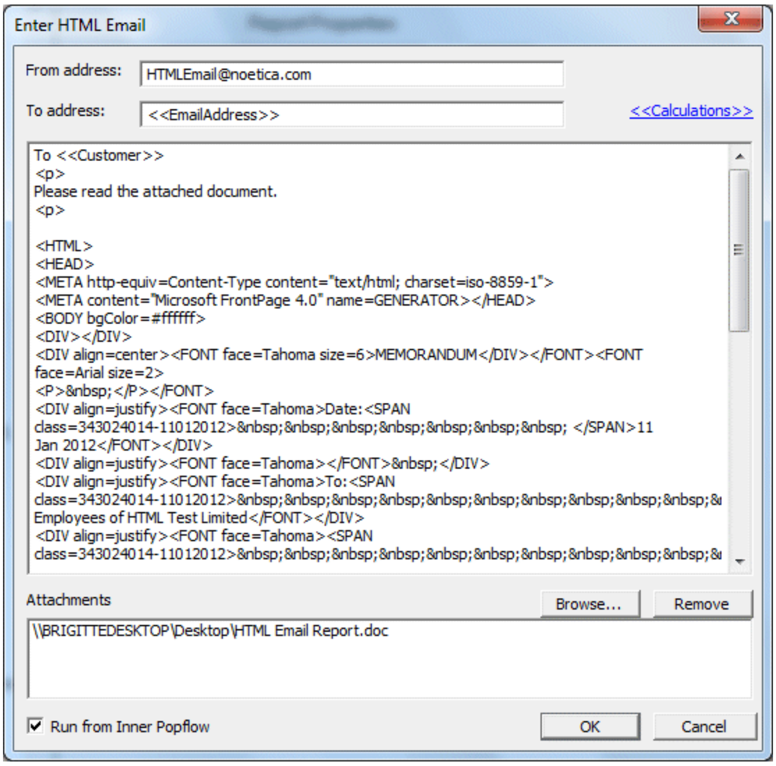
To add attachments to your HTML email

- Click the ***Browse...*** button and locate the file that you wish to attach.

- Ensure that the file attachment sits on the system somewhere where the HTML Email Service can see them, i.e. the Synthesys Application Server or a system share somewhere.

- Use the full UNC paths i.e. \\Machine\sharename \directory\filename, when picking up the file.

- Click ***OK*** to save your HTML email, or ***Cancel*** to exit the *Enter HTML Email* dialog without saving the changes.



Click the ***Browse...***button to locate file attachments

To remove file attachments from your HTML email

- Select the file attachment that you wish to remove in the Attachments section.

- Click the ***Remove*** button.

- Click ***OK*** to save your HTML email, or ***Cancel*** to exit the *Enter HTML Email* dialog without saving the changes.

See next page for information about creating HTML email reports and schedules.

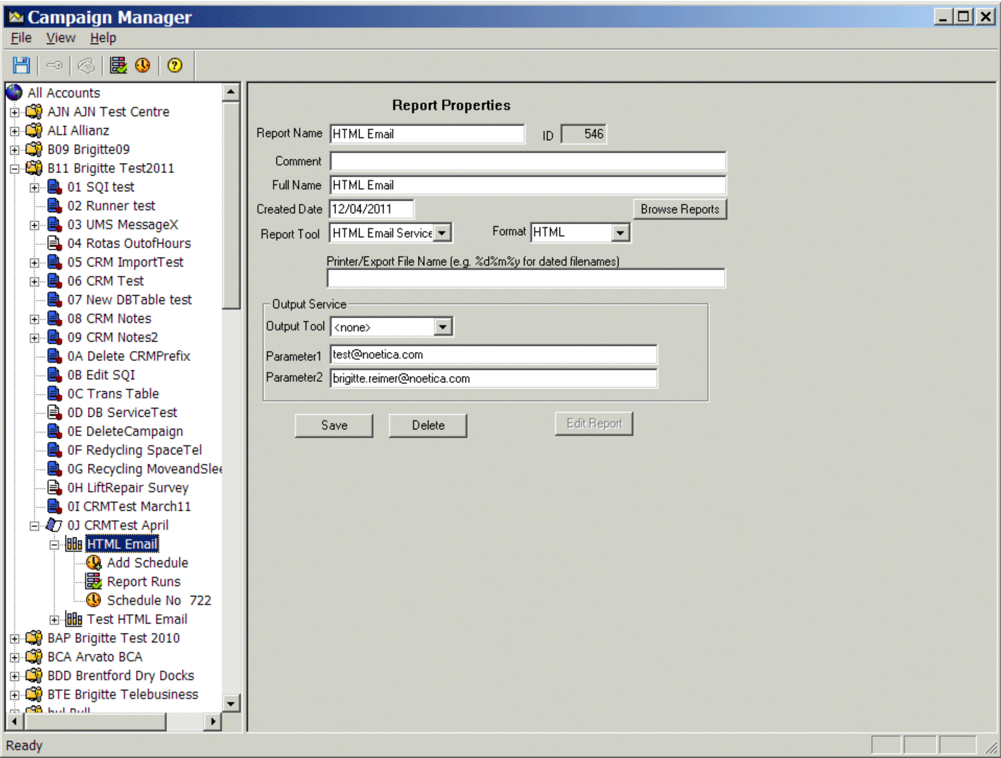
Creating HTML Email Reports

On saving the HTML email, the associated fields will be filled automatically in the *Report Properties* screen:

Report Tool	*HTML Email Service is selected by default*
Format	Is set to *HTML*
Parameter1	Displays the email address of the sender
Parameter2	Displays the email address of the recipient

All you need to enter is a name for the report into the ***Report Name*** and ***Full Name*** fields and any comment, if required into the ***Comment*** field.

The printer/export file name can be left blank for HTML email reports.



The *Report Tool* and *Format* fields will already be populated with the *HTML Email Service* and *HTML* respectively and the ***email address*** of the sender (Parameter1) and recipient (Parameter2) will contain contact details as entered in the HTML email.

Next, set up an instant schedule for the HTML email report. Please see next page, for more information.

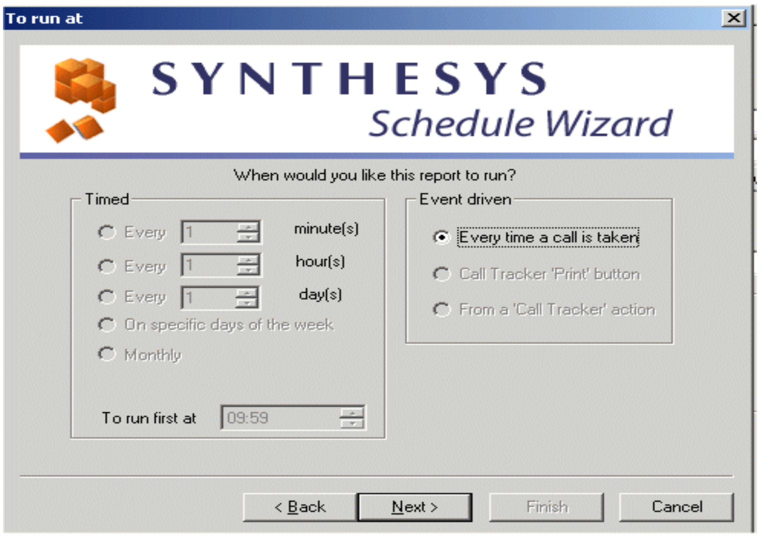
Creating Instant Report Schedules

HTML email reports can only be run instantly, i.e. every time a call is taken.

In the **Schedule start** Dialog:

- Select ***Immediately*** to start your report run straight away or ***Starting on*** to select a start date from the diary page.

As HTML email reports can only be run instantly, the option ***Every time a call is taken*** is already selected in the next page of the Schedule wizard, with all other options greyed out.



- Move to the *Next>* page of the Schedule wizard, were you can select all, or specific call results for your report run, using the *Add>>button*.

- Check that the frequency and required parameters are displayed correctly in the summary dialog, before clicking *Finish* to save the instant report schedule.

Editing an HTML email report

To edit an existing HTML email:

- Right click on the report and select 'Edit HTMLEmail'.

- In the *Enter HTML Email* dialog subsequently displayed, make your changes as required. Email address details can be modified directly via the Parameter1 & 2 fields in the *Report Properties* screen, as well as in the *Enter HTML Email* dialog.

Example of an HTML Email

Here an example of the html email that was sent:

MEMORANDUM

Date: 11 Jan 2011

To: All Employees of HTML Test Limited
Synthesys Training Limited
Noetica Limited
Test Systems Limited

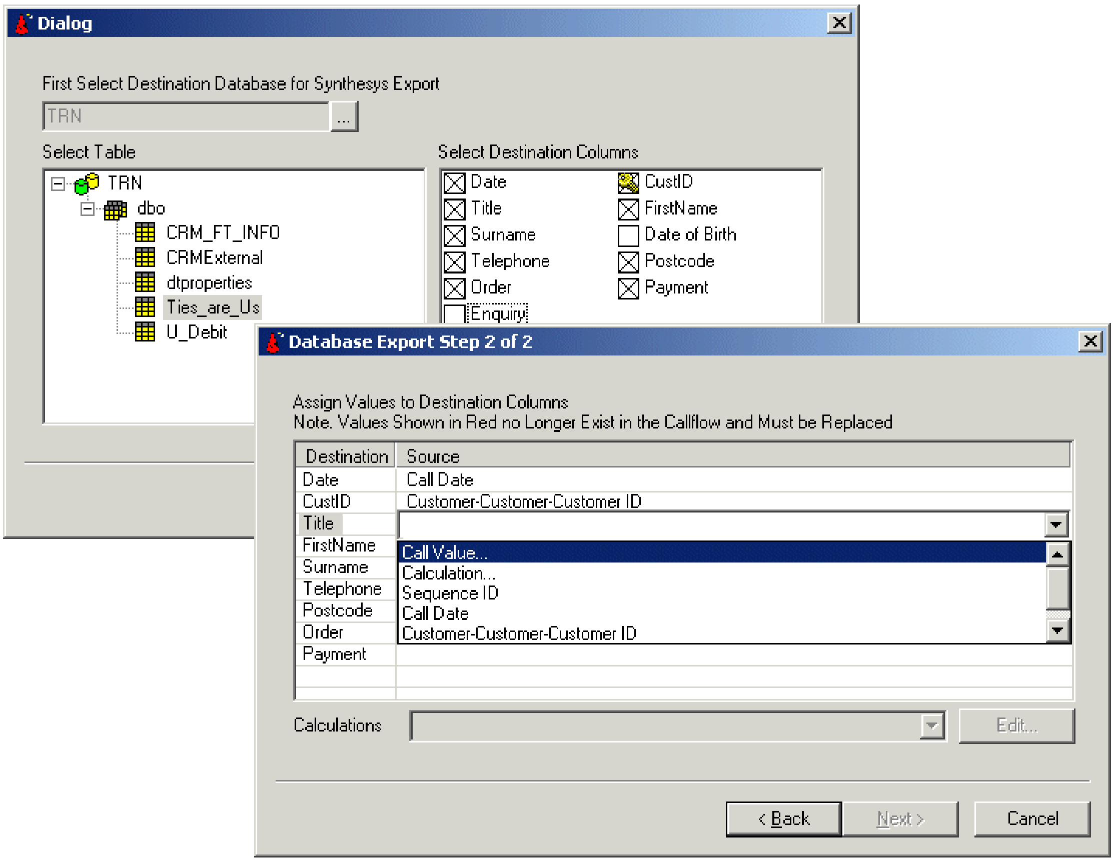
From: Sarah Jones
HTML Test Limited, Group Finance Director

Subject: Year End 2010/11 - Expense Claims

As the end of the 20010/11 accounting and tax year is rapidly approaching I am now planning to close the accounts as early in April as possible. In order to do this, anyone submitting a March expense claim should do so with expenditure up to and including, but **NOT** beyond, the 31st March 2011.

Your co-operation is appreciated.

EXPORT WIZARD



THE SYNTHESYS EXPORT WIZARD

Introduction 61
Creating a New Export 61

FLAT FILE EXPORT 62
Delimiters & Field Qualifiers 62
Callflow Answer Selection 63
Selecting the Export Destination 63
Report Details for the File Export 65
Checking Report Runs 65
Editing Flat File Exports 65

EXPORT TO A DATABASE TABLE 66
Selecting the Destination Database 66
Callflow Answer Selection 67
Report Details for the Database Export 69
Setting Instant Schedules in the Schedule Wizard 69
Editing Database Exports 70

USING CALCULATIONS IN DATABASE EXPORTS 71

EXPORT TO AGENT DASHBOARD 72

EXPORT TO UPDATE CRM FIELDS 75
Accumulative Comments 77
Saving the Export and Adding Schedules 77

Introduction

Using the ***Export Wizard***, data from a Synthesys call can be exported to an external data source, for example to a database table or as a comma separated file.

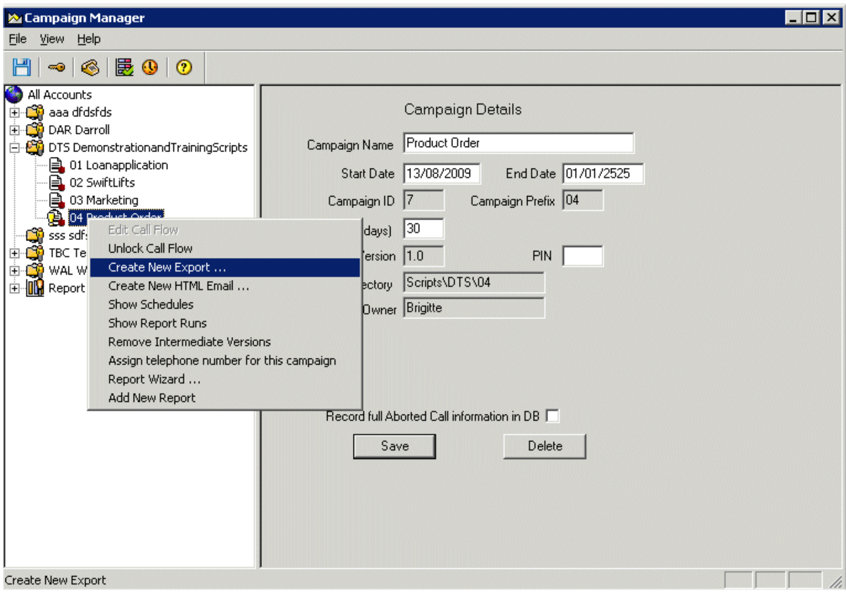
The Export Wizard is used to generate a file controlling the export. This file is then used to reproduce the export as many times as required in much the same way as reports are generated.

Exports are always scheduled as Instant reports.

Creating a New Export

Exports are created in the *Synthesys Campaign Manager*, using the *Export Wizard*:

- Click on ***Reports*** under the **Setup** heading of the Synthesys main screen, to open the *Campaign Manager*.
- Select and right click on the campaign for which you want to create the export and select **Create New Export** from the drop down menu.

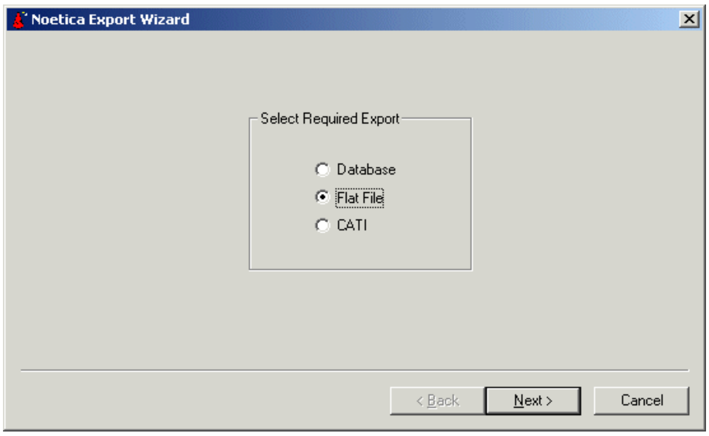


Please see the next pages for information about exports to ***Flat File*** or ***Database***

FLAT FILE EXPORT

To export data as a comma separated text file:

- Selected the **Flat File** option in the Export Wizard, then move to the NEXT> page of the wizard to continue.

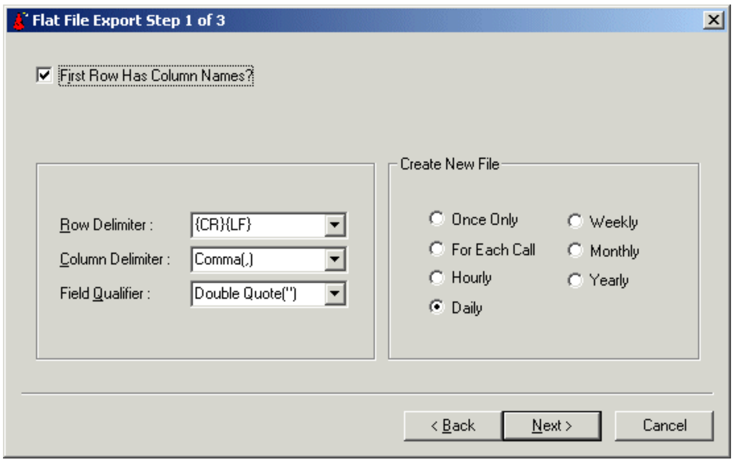


Delimiters & Field Qualifiers

- If the file that you export should contain column headers, tick the option ***First Row Has Column names.***

- Select the required **Row** and **column Delimiters** and **Field Qualifiers** for your Export.

- In the **Create New File** column select the ***Time Interval, i.e.*** if you want to create a new file for each call, hourly daily weekly etc

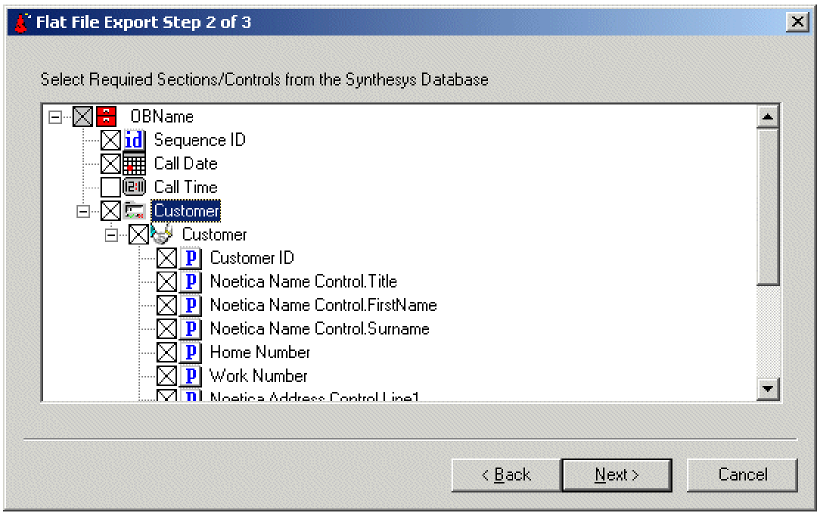


- Click next> to move to the next page of the wizard.

Callflow Answer Selection

The selected callflow is presented in a Tree style with check boxes to allow selection of the required sections and controls that will be exported.

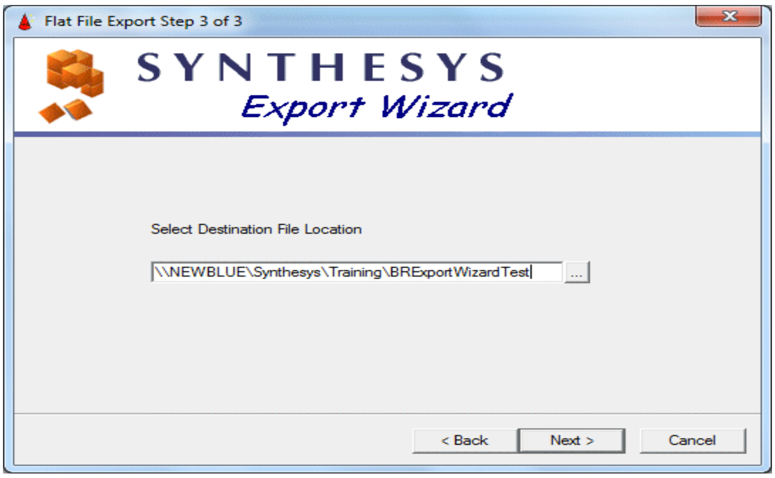
You can also select a set of core elements, such as Call Duration, Date and Time.



Selecting the Export Destination

Next you need to specify the **export destination** for the Synthesys call data file. You can

- Type in the path for the file export, or
- Select the path using the Browse button, ensuring that it includes the machine name and drive **\\MachineName\Drive\ File Location.**



If the file path entered or selected is invalid, the following message is displayed:

'Selected Location is not available to the Export Service. Please reselect'.

Move to the Next> page of the wizard.

The file used to generate the export will be stored by default on the server under **Synthesys Reports.**

You can change the location if required, using the Browse button.

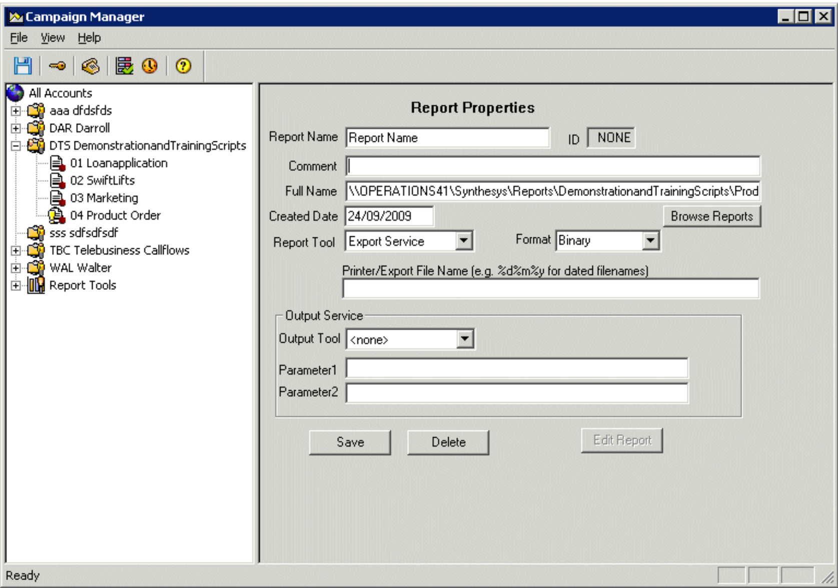
- Click ***Finish*** to Save the export.
- Click **<Back** to return to edit information in previous pages.
- Click **Cancel** to abandon the action without saving the settings.

Please see next page for more information.

Report Details for the File Export

You now need to enter the report details for your file export:

- Enter a ***Name*** for the export report
- Ensure that **Export Service** is displayed as your **Report Tool** and **Binary** is displayed as the Format
- **SAVE** the report details.



- Next, use the Schedule wizard to **add an Instant Schedule**, selecting **'Every time a call is taken'** (in the Event driven column).

Checking Report Runs

- To check that the report has run successfully, click on **Report Runs** under your Export report.
- The call data will be exported to the specified file location and you can open it using Notepad.

Editing Flat File Exports

To **edit** your export file:

- Right click on your Export report and select ***Edit Export*** to open the Export Wizard.
- Make your changes by moving through the pages of the Export Wizard clicking the Next> button.

EXPORT TO A DATABASE TABLE

To export your Synthesys call data to a database table:

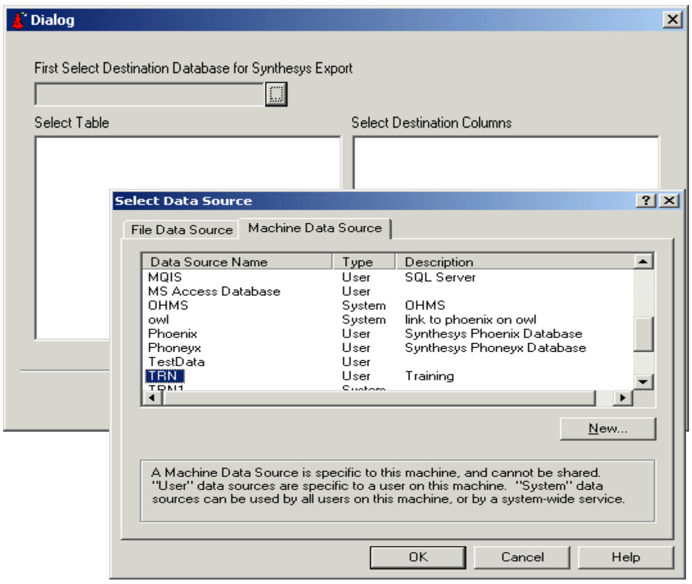
- Select the **Database** option in the Export Wizard, and then click Next>.

Before using the Wizard, ODBC data sources must be set up with the same names on the Server which the Export Service is running on and on each Workstation that will be used to create new or edit existing "Export Service" reports.

Selecting the Destination Database

To select the **destination database** for your export:

- Click on the **Browse** icon to open the **Select Data Source** window.
- Here, click on the **Machine Data Source** button and select your *data source name* from the list displayed, before clicking **OK**.



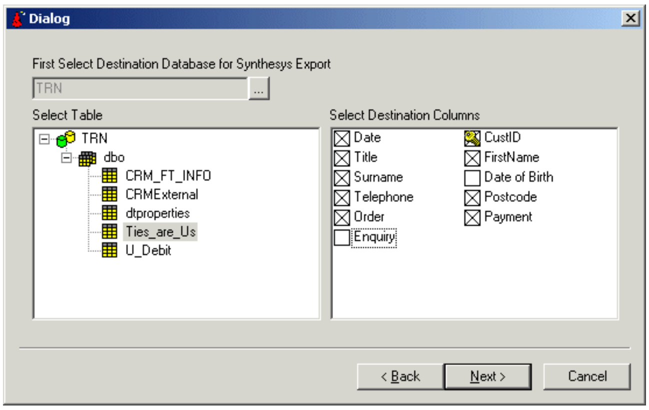
In our example, the data source we have created for our database export is called '*TRN*'.

Selecting a Database Table

Having selected your *data source name:*

- Select the **database table** for your Synthesys export, displaying the corresponding **data columns.**

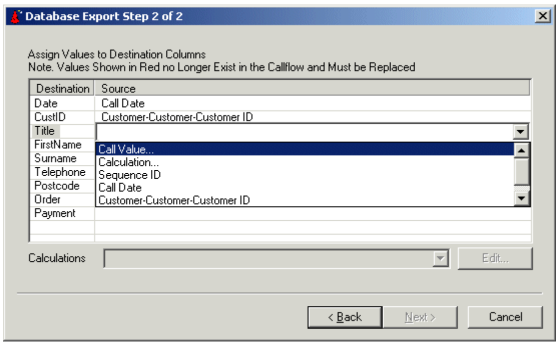
- In the ***Select Destination Column*** window, de-select any columns not required for your export by clicking on them.



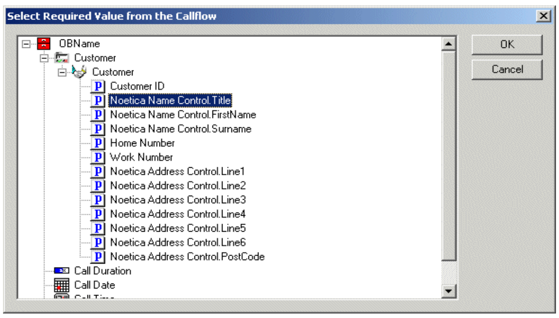
Callflow Answer Selection

In the ***Database Export*** window, select the **data** to be exported from the callflow:

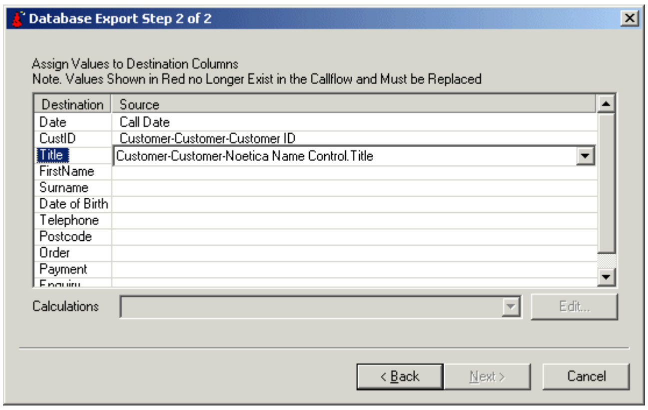
- Click into the **Source field** on the right hand side and select **Call Value** from the drop down list.



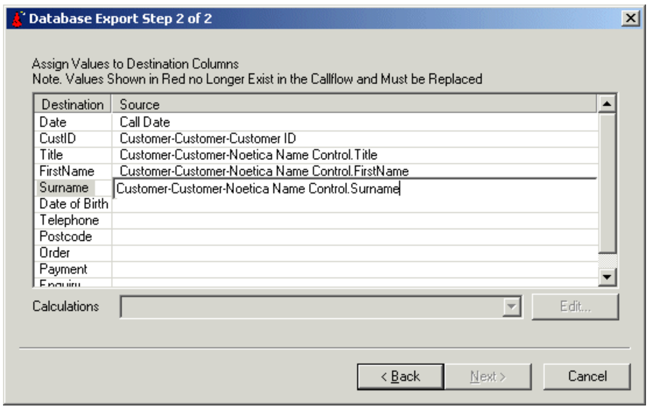
- In the **'Select Required Value…'** window, which displays your section and control names, **select** the **field** that you wish to export and then click **OK.**



The property selected is entered in the *Source* field of the Database Export window.

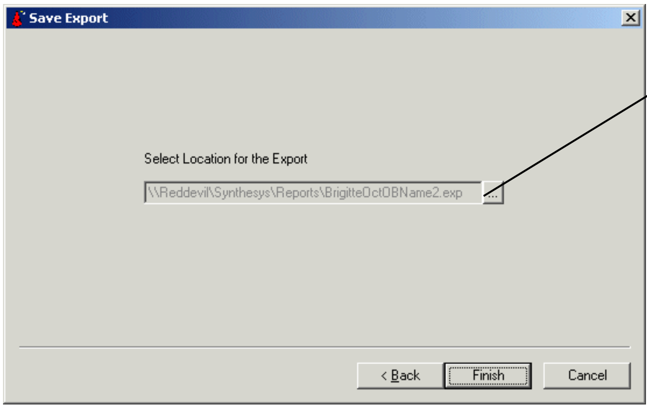


- Repeat the above actions until you have assigned values to all of the columns.
- Use the ‘Back’ button if you need to go back to the ‘Select Required Value..’ window, to deselect extra column names.



When values have been assigned to all columns, the ‘Next’ button will be enabled and you can move to the next screen.

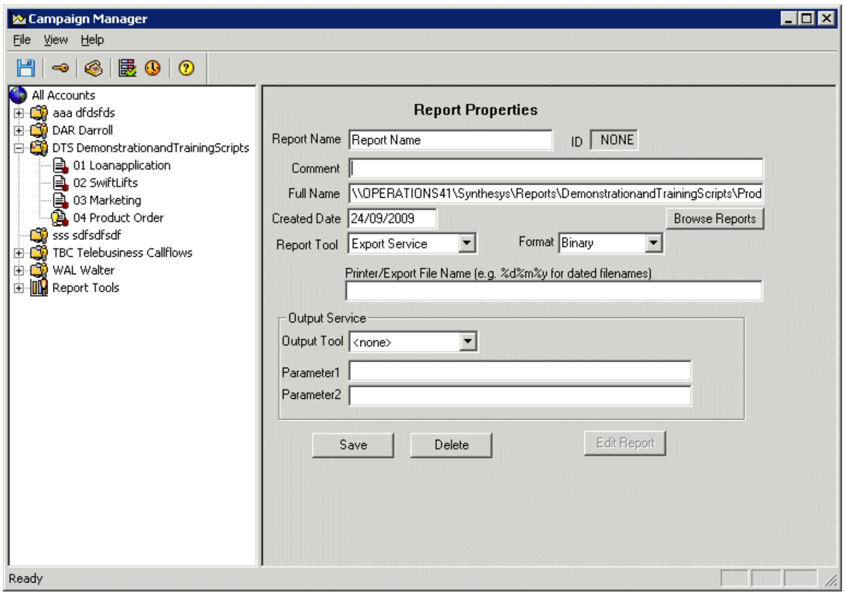
The file used to generate the *Export* will be stored by default on the server under Synthesys Reports but you can change the location if required, using the Browse icon. Click ‘Finish’ to save the export.



Report Details for the Database Export

To enter the report details for your database:

- Enter a ***Name*** for the export report
- Ensure that **Export Service** is displayed as your **Report Tool.**
- Ensure that **Binary** is displayed as the Format.
- **SAVE** the report details.



Setting Instant Schedules in the Schedule Wizard

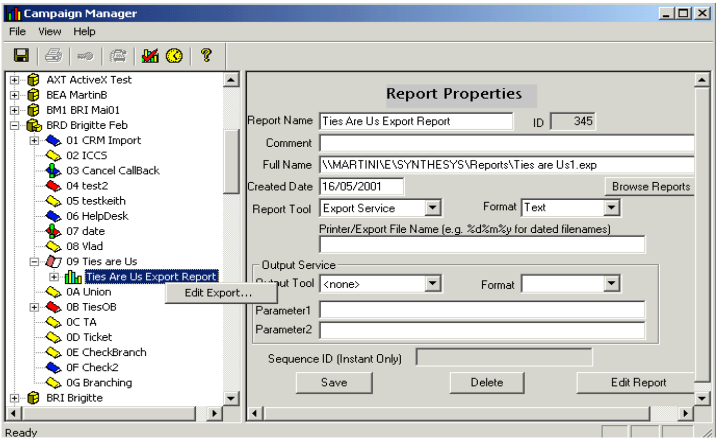
- Add an Instant Schedule, selecting ***Every time a call is taken*** (in the *Event driven* column).

Editing Database Exports

Every time you modify your callflow, adding, renaming or deleting sections or controls, you must update your export in the Export Wizard.

To open the Export Wizard and to edit your export file:

- Locate the export report to the Campaign Manager, right click on the report and select ***Edit Export*** from the drop down menu.

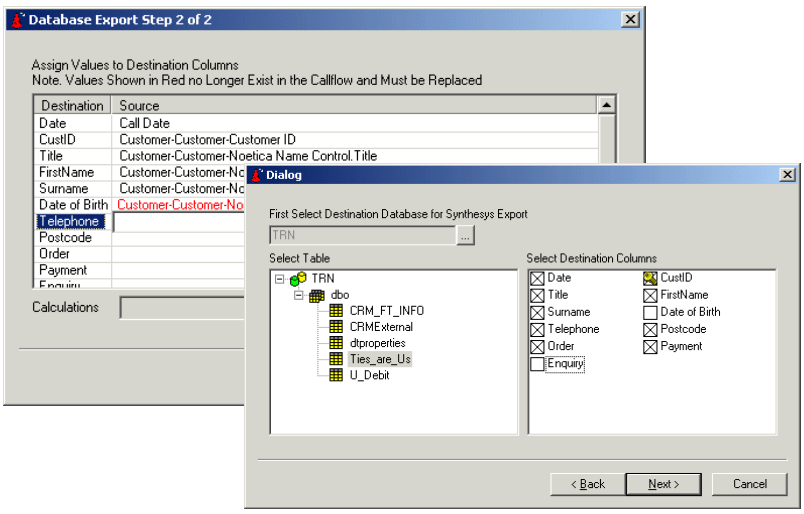


- Any required changes can be made, by moving through the pages of the Export Wizard clicking the 'Next' button.

Any values shown in RED are values that are incorrect or have been removed from the Callflow and therefore need to be replaced.

- Assign new values or deselect the column(s) no longer required in the 'Select Destination' Column.

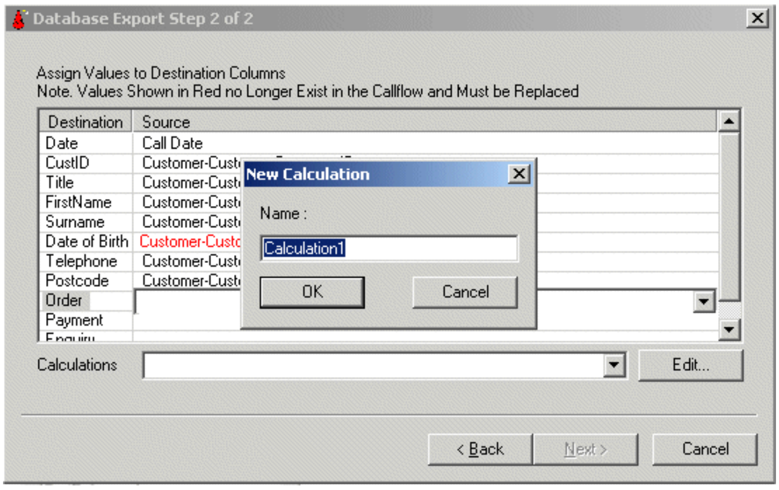
- Update your destination database, to display new values that have been added to the callflow.



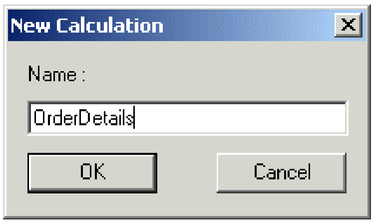
USING CALCULATIONS IN DATABASE EXPORTS

To add a calculation:

- Click into the Source field on the right hand side and select **Calculation** from the drop down list.



- Next, click into the ***Destination*** box to open the '***New Calculation***…' window and enter a name for your calculation.



On clicking OK, the Calculation definition window will open and you can enter your calculation as required.

EXPORT TO AGENT DASHBOARD

The ***Agent Dashboard*** is displayed to the agents in the *Callflow Display* area of the *Agent Start Work* screen, when agents are not currently in a call. The ***Dashboard*** shows statistical information about the calls that agents have taken and can be configured to also include the commission due to an agent, based on a percentage of the total amount of sales.

To display the commission as part of the statistical information on the dashboard, you need to create an ***Export*** in the *Synthesys Campaign Manager*, exporting the call data of the *Sales* campaign to the ***Synthesys_Reports_Sales*** table in the *Phoenix database.*

- Click on ***Reports*** under the **Setup** heading of the Synthesys main screen, to open the *Synthesys Campaign Manager*.
- Select and right click on the *Sales* campaign for which you want to create the export and select ***Create New Export*** from the drop down menu.
- In the *Export Wizard,* select the **Database** option, before moving to the *Next>* page.
- Using the **Browse** icon, select the destination database, ***Phoenix,*** under the *Machine Data Source* tab in the *Select Data Source* window.
- From the *Phoenix* database, you now need to select the table for your export, which is ***Synthesys_Reports_Sales.*** The required destination columns are automatically selected.

Move to the Next> page of the *Export wizard*, where you need to assign the required values to the destination columns.

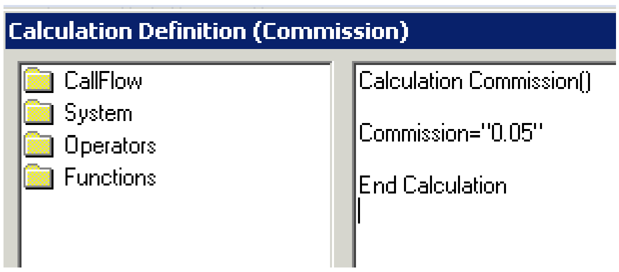
The value for the Sequence_id and Sale_Value columns are assigned using the ***SequenceID*** and ***Call Value*** options from the drop down menu in the *Source* section.

To specify the commission:

- Select ***Calculation*** from the drop down window and enter a logical name into the *New Calculation* window.

The commission is entered as decimal percentage, i.e. 5% = 0.05.

- To specify a commission, say of 5%, enter the following calculation:

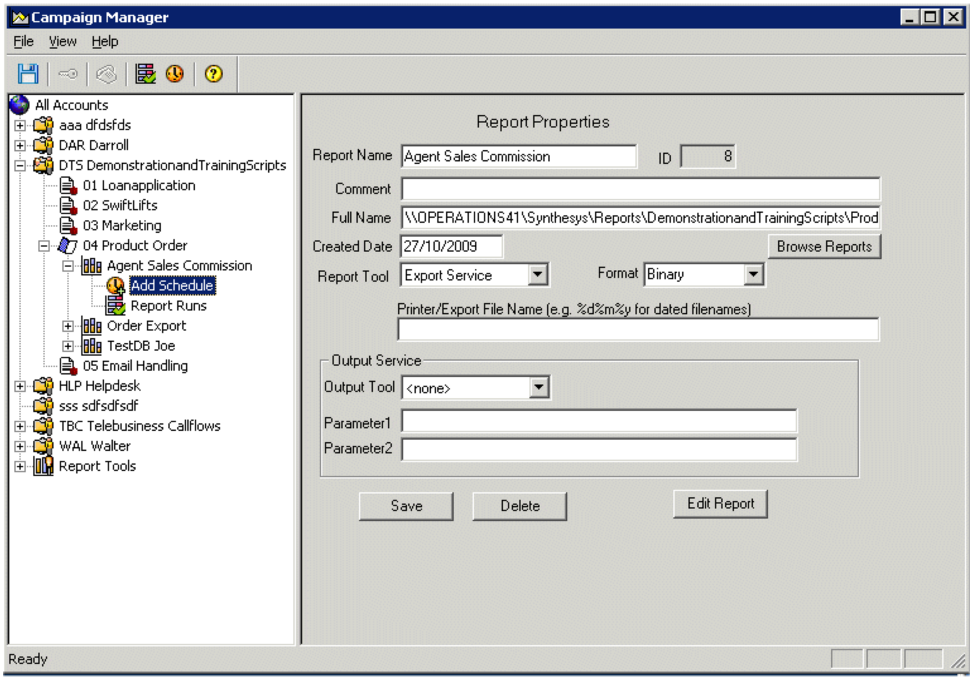


Move through the remaining pages of you wizard and click *Finish*, to return to the ***Report Properties*** window, where you enter the report details and set up an *Instant* report schedule.

Please see next page for more information.

To enter the report details for your database export:

- Enter a ***Name*** for the export report
- Ensure that **Export Service** is selected as the *Report Tool* and **Binary** as the *Format*.



SAVE the report details and the set up an ***Instant*** schedule for your data export*:*

- Click ***Add Schedule*** under the *Export* that you have just created, to open the *Synthesys Schedule Wizard*
- Add an ***Instant*** Schedule, selecting ***Every time a call is taken*** (in the *Event driven* column).
- Select the ***Call Result*** that should trigger the export, i.e 'Sale' or 'Order', as specified in the conclusion flag of the callflow of your *Sales* campaign.

EXPORT TO UPDATE CRM FIELDS

Using the *Synthesys Export Wizard,* data from a Synthesys call can be exported to an external data source or the export can be used to update CRM fields 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.

To run an Export to update a CRM with details collected during a call:

- **Add** the required **fields to** your **CRM**, so that the information can be entered and updated when the Export is run.

- **Create** a data **Export** in the Campaign Manager, using the Export Wizard.

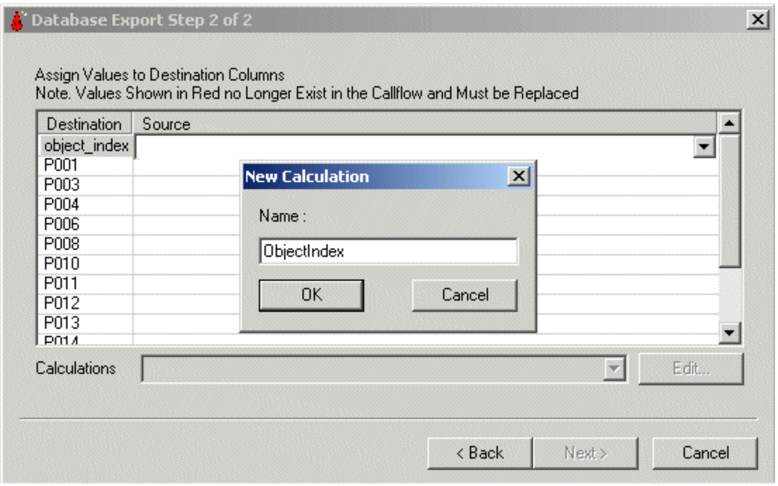
Before creating the Export, ***check*** *the name of your* ***CRM Prefix and CRM section name and in SQL- Phoenix****, check* ***the CRM column names and associated codes*** *of the fields you wish to update (i.e. Log Number = P017).*

In the Export Wizard:

- Select **'Phoenix'** as the Machine Data Source and then the relevant CRM table for the export, i.e. CS_CRM Prefix_Customer,

- In the Select Destination column, deselect, apart from object_index and P001 (which refers to the Customer ID), any of the CRM fields not required for the export/ update.

You then need to assign values to the Destination Columns.

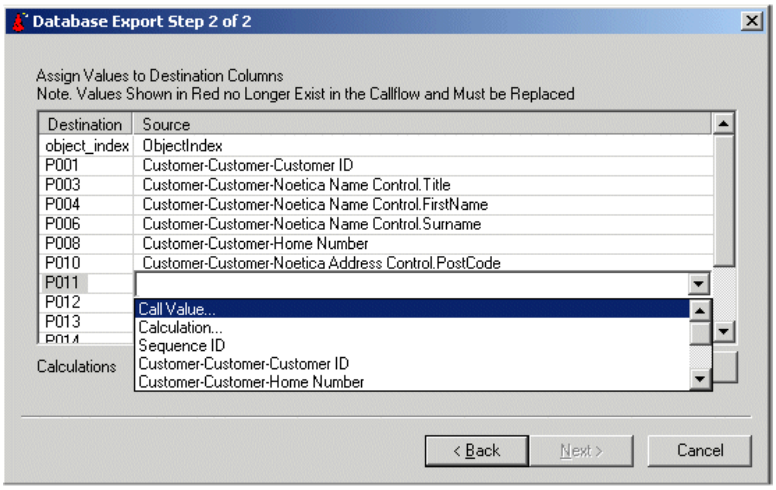


To assign the value for the object_index field, create the following calculation:

Calculation ObIndexCustID()
Sql = "Select OBJECT_INDEX from CS_ZZ1_Customer where P001 = '" & [CallFlow.CRM.CRM.Customer ID] & "'"
ObIndexCustID = DatabaseLookup("Phoenix",Sql)
End Calculation

- Any fields highlighted in blue must represent the name that you gave to your Calculation, your CRM prefix and your CRM section.
- ****The calculation 'SQL = "…. ' must be kept in one line.**

Next, fill the rest of the Destination Columns with the relevant fields from the callflow, using **Call Value** from the drop down menu in the source field.



Accumulative Comments

To capture accumulative comment details, ensure that the ***Noetica Text control*** *in the CRM is displayed as a Noetica control, i.e that the option* ***'Force to appear as control in search mode'*** *is ticked for the Noetica Text control in the* ***CRM Gallery.***

To assign the value for the comments field, including agent name, time stamp and accumulative text, displaying the last 2048 characters of comments inserted, create the following calculation:

Calculation Comments()

Comments=[CallFlow.CRM.CRM.Noetica Text Control.Value] & "
" & [System.AgentName] & " " & CurrentDateTime( ) &"
"& [CallFlow.ClientComment.Comment.Value]

Le= len(Comments)

If Le > 2048 then
    Comments = Right(Comments,2048)
Else
    Comments = Comments
End if

End Calculation

End Calculation

NOTE: Calculation statements can be split, pressing ENTER between the &" "& characters to display information, i.e the agent name, on a separate line.

Once all the destination fields are filled, click **FINISH**.

Saving the Export and Adding Schedules

In the Campaign Manager:

- Enter a Name for your Export report
- Select Export Service as your Report and click SAVE.
- Use the *Schedule Wizard* to add an Instant Schedule, selecting 'Every time a call is taken' (in the Event driven column).

TROUBLESHOOTING

Problem: Reports containing no data
Solution: 1.The filter may be filtering out too much data

2.The Report may be using the wrong database tables or tables from different campaigns that are not related, check SQL in Report Query.

3.The Report may be using the wrong columns, check SQL in Report Query against Callflow design.

4.'Impromptu' does not support column names of over 32 characters so if the custom tables created by your Callflow has such columns you may need to modify the Callflow.

Problem: Report contains too much data
Solution: Incorrect filer, instant Reports must include the Sequence_ID from Phoenix Report table

Problem: 'One copy of Synthesys is already running'
Solution: Use Control-Alt-Delete to Terminate 'Workstation'

Problem: 'Invalid Session' message box, ResetSession
Solution: The System did not finish your last session properly, run ResetSession to end your previous session.

Problem: 'Unable to open Synthesys.inf' error
Solution: The network is probably not working

Problem: Placeholders don't appear in templates.
Solution: Templates only work properly in Impromptu over a network when done using a mapped network drive. Map a drive to where the template is and then try again.

Problem: 'This will result in a 'Cross-Product report'
Solution: The joins between your tables are not set up correctly.

Problem: After a system crash in Editor, releasing produces error32 cannot copy file.
Solution Stop DBSharedMem & restart

SYNTHESYS CAMPAIGN MANAGER

Managing Accounts & Campaigns

Renaming Accounts & Campaigns

Re-setting a Synthesys Session

Assign Telephone Numbers to Campaigns

Remove Intermediate Versions

Deleting Accounts

Deleting Campaigns

Deleting Reports & Schedules

MANAGING ACCOUNTS AND CAMPAIGN

The Campaign Manager shows a tree structure of all the accounts and campaigns created and released in the Campaign Editor.

In the Campaign Manager you can rename and delete accounts & campaigns, reset sessions, add and schedule reports and view report run histories and delete repots and report schedules. For more information about managing reports from the Campaign Manager, please refer to 'Creating and Managing Reports'

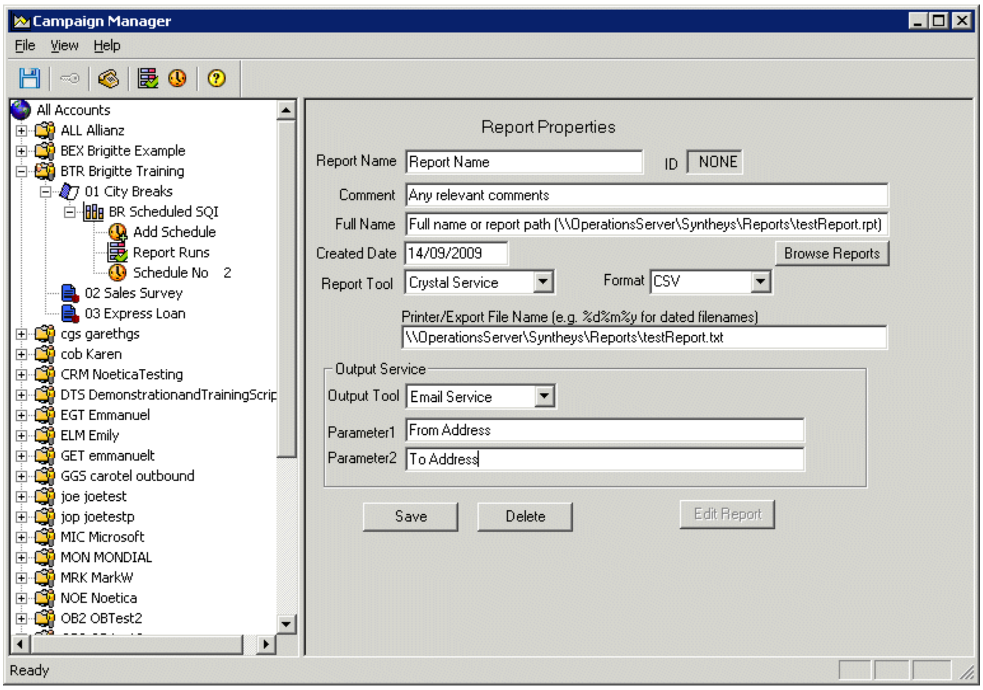
N.B. A 'Campaign' is synonymous with a 'CallFlow' in that a campaign always has one callflow associated with it. This document uses the term 'Campaign' rather than 'CallFlow'.

To start the Campaign Manager, click on ***Reports*** under the **Setup** heading of the Synthesys main screen.

Renaming Accounts and Campaigns

In the Campaign Manager:

- Expand the ***All Accounts*** icon and select the account or campaign you want to rename. Account or Campaign details will be displayed on the right-hand side of your screen.
- Put your cursor into the *Account* or *Campaign Name* field and edit as required.
- Click ***Save*** to commit the changes. You will see that your account or campaign listed on the left-hand side has been renamed.



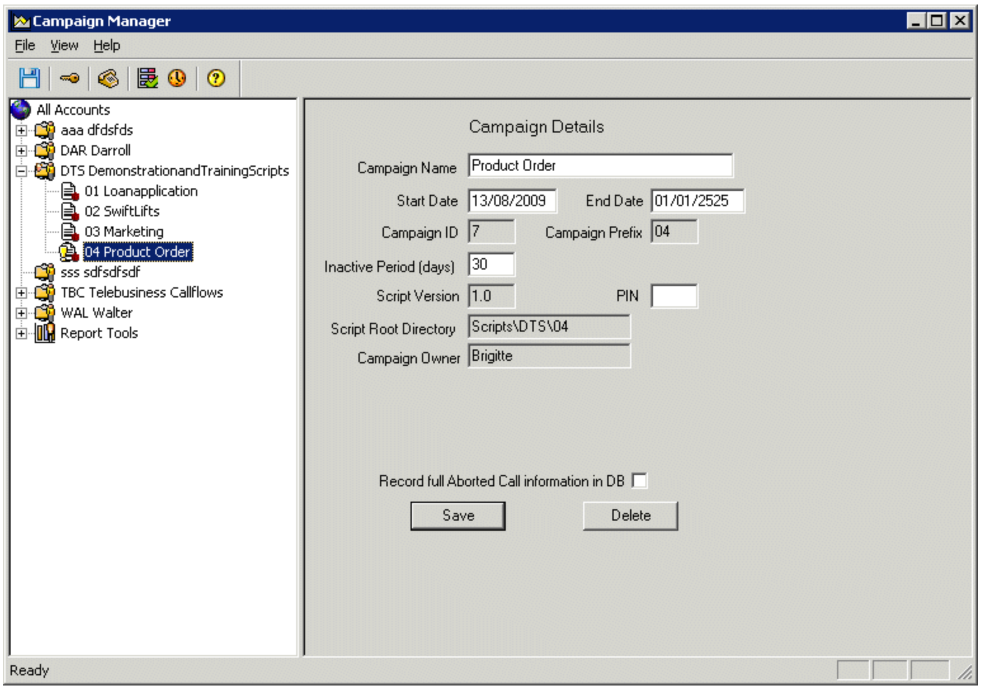
The account or campaign you have renamed will now be displayed with its new name in the *Select a Callflow* dialog of the Campaign Editor and in the Agent module.

Auto Archive Option

The number of hours that an ***Inactive*** call will remain as inactive before its status is automatically changed to 'Archive' by the Housekeeper is known as ***Inactive Period***.

When a callflow is created the user chooses the 'Inactive Period' for the callflow. The 'Inactive Period' can also be changed using the Campaign Manager.

The default setting for the 'Inactive Period' is 30 days but this can be reduced as required.



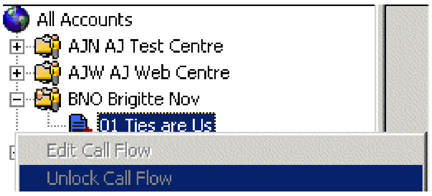
Only calls that have been inactive for longer than the 'Inactive Period' will have their status changed to 'Archive'.

Re-Setting A Synthesys Session

If you exit from the *Synthesys Campaign Editor* using non-standard methods, such as **Ctrl+Alt+Del**, or through a system crash, your user account will normally be reset automatically and on accessing the system a message ***Recovered Phoenix Session*** will be displayed.

Sometimes however you need to reset your session manually in the Campaign Manager.

- Expand the ***All Accounts*** icon to display the list of your Accounts.
- Next, select the **Account** and **Campaign** for which you need to reset the session.
- **Right click** on the Campaign and click **Unlock Call Flow**.



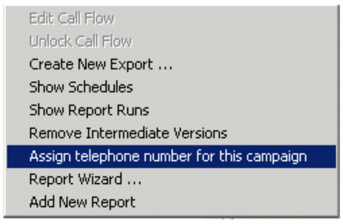
The session is now reset and you will be able to access the Synthesys Modules without receiving any error messages regarding invalid sessions.

Information about the ***campaign_owner***, i.e the person who has the script open (or who had it open when they crashed) is logged in the 'Phoneyx' database, with a reference in phoenix_session, which records the username, machine name etc.

Assign Telephone Numbers to Campaigns

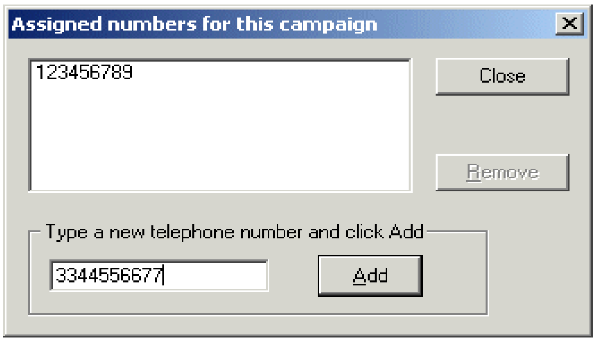
Assigning telephone numbers to campaigns allows calls for a campaign to be routed to the available agent(s), automatically displaying the appropriate callflow.

- To assign a DDI (Direct Dial In) number to the campaign in the Campaign Manager, Right click on the relevant campaign and select *Assign telephone numbers to this Ccmpaign*.



- In the *Assigned numbers for this campaign* dialog enter the DDI number in the *Type a new telephone number field* click the *Add* button and then *Close* to exit the dialog.

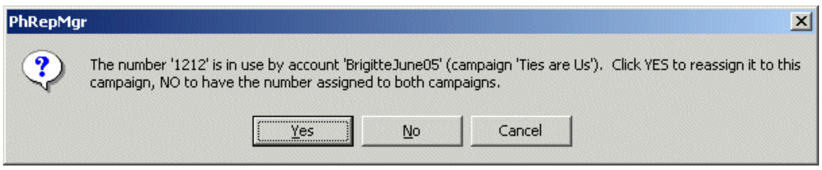
- To remove a DDI number, select the number and click the *Remove* button.



It is possible for one campaign to have more than one dial in number and it is also possible for several campaigns to share an incoming line.

If the telephone number to be added is already used in another campaign, a message will be displayed and you can either:

- Click *Yes* to reassign the number to the current campaign or *No,* to assign the number to both campaigns.



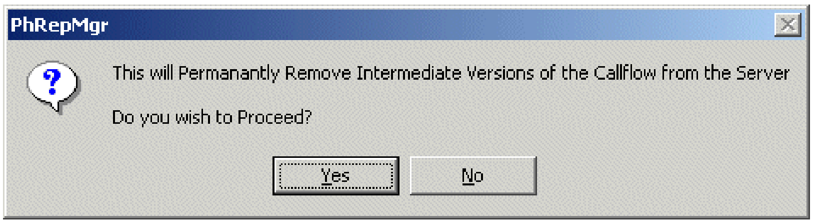
If different campaigns share an incoming line, a box is displayed when taking calls, asking agents to select the campaign they wish to run.

Remove Intermediate Versions

The new Campaign Manager has the functionality to delete interim versions of callflows.

- Right click on the campaign, for which you want to delete the interim (saved) versions and select *Remove Intermediate Versions*.

A message will inform you that this will permanently remove all previously saved versions for the selected campaign.



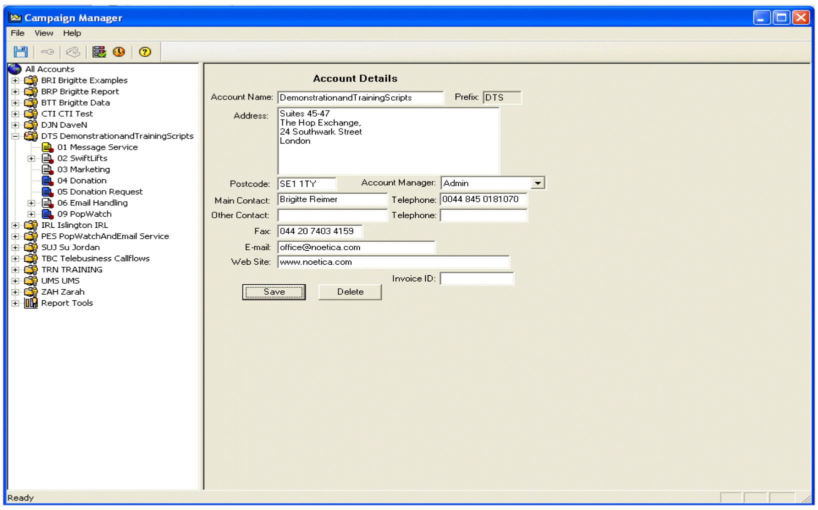
To go ahead click *Yes*, to cancel the action click *No.*

Deleting Accounts

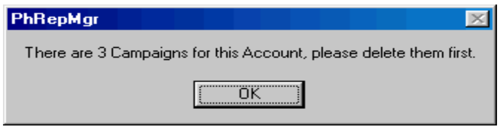
To delete Accounts or Campaigns:

- Expand the ***All Accounts*** icon in the Campaign Manager and select the account or campaign you want to delete.

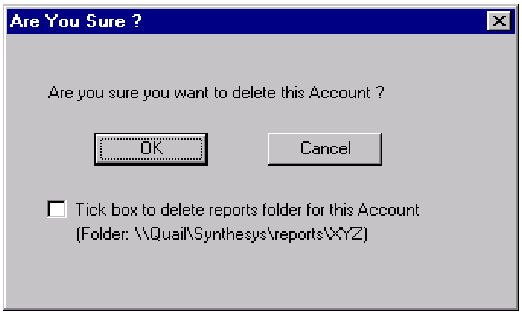
- To delete the selected account or campaign, click the ***Delete*** button.



Before an account can be deleted from Synthesys, all associated campaigns must be deleted first. A message to this effect will be displayed and the account will not be deleted.



- When all campaigns have been deleted for the account, press the ***Delete*** button will display the following message:



If the check box is ticked, the reports folder for the account will also be deleted.

Press OK to delete the Account.

A message will inform you that the account has been deleted and the icon for the account will disappear from the Campaign Manager.

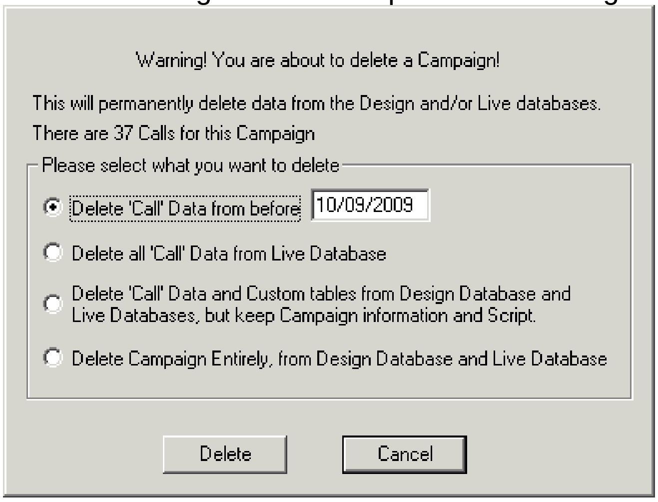
When deleting an Account, the following takes place:

The Account is deleted from the ‘Reports’ folder on the Server (if applicable).
The Account is deleted from Phoenix_Account table (Phoenix database).
The Account is deleted from Phoenix_Account table (Phoneyx database).
The Account is deleted from the ‘Scripts’ folder on the Server.

Deleting Campaigns

- Select the campaign you wish to delete and click the Delete button.

A window listing the various options for deleting campaigns is displayed:



Campaigns and Active Sequences

If there are *Active Sequences* associated with this campaign, you must go to the Call Tracker and archive any active and inactive calls, before the campaign can be deleted.

Campaigns with Outbound Campaigns

Any Outbound campaigns that have been set up under the campaign that you wish to delete need to be deleted first in the Outbound Manager.

Options for Deleting Campaigns

A record of the SQL commands used to delete the Campaign is recorded on the Server in EventLogs\DelCampaign\ folder, in .SQL files prefixed with the CampaignID.

Option 1: Delete Call Data from before date

This option will delete data for this Campaign prior to the specified date. This option is useful for deleting 'test' calls for the Campaign before it goes live. This ensures that only live data is contained in the database.

The following takes place when this option is selected:

1. Transaction files for this Campaign are deleted from the Transactions folder on the Server.

2. CallFlow data is deleted from tables prefixed with the three-letter Account-prefix and two-digit Campaign-prefix, e.g. ABC01_Main, from before specified date (Phoenix database).

3. Data is deleted from Phoenix_Event table from before specified date (Phoenix database).

4. Data is deleted from Phoenix_Sequence table from before specified date (Phoenix database).

The above is then repeated for the Phoneyx database.

Option 2: Delete all Call Data from database

This option will delete all call data for this Campaign, but the tables themselves will remain. Use this option to delete all Campaign data, e.g. when re-starting an old Campaign.

The following takes place when this option is selected:

1. Transaction files for this Campaign are deleted from the Transactions folder on the Server.

2. All CallFlow data is deleted from tables prefixed with the three-letter Account-prefix and two-digit Campaign-prefix, e.g. ABC01_Main (Phoenix database). N.B. data in the *C*ALL_RESULT table is not deleted, as this relates to the CallFlow itself.

3. Data is deleted from Phoenix_Event table (Phoenix database).

4. Data is deleted from Phoenix_Sequence table (Phoenix database).

The above is then repeated for the Phoneyx (Design) database.

Option 3: Delete Call data and Custom tables from Design Database and Live Databases, but leave Campaign information and Script

This option deletes all database tables specific to this Campaign, and all other call data. The Campaign still remains in the Campaign Manager and the CallFlow itself can still be edited by the Campaign Editor.

Use this option when a CallFlow has been edited and changed significantly in its layout, and you no longer need tables or columns that were created by previous releases. As long as you are sure that you have no historical data that you need to retain, this option will delete all custom tables, but keep the CallFlow file. The CallFlow can then be re-released creating a fresh set of tables.

The following takes place when this option is selected:

1. Transaction files for this Campaign are deleted from the Transactions folder on the Server.

2. All CallFlow tables are deleted – those prefixed with the three-letter Account-prefix and two-digit Campaign-prefix, e.g. ABC01_Main (Phoenix database). N.B. the CALL_RESULT table is not deleted, as this relates to the CallFlow itself.

3. Data is deleted from Phoenix_Event table (Phoenix database).

4. Data is deleted from Phoenix_Sequence table (Phoenix database).

The above is then repeated for the Phoneyx (Design) database.

Option 4: Delete Campaign entirely, from Design database and Live Database.

This option deletes the campaign entirely. All database tables relating to the Campaign are deleted from both databases, as are the CallFlow files and transaction files.

The user will be stopped from deleting the Campaign by a pop-up message box if:

- There are any 'Outbound Campaigns' for the Campaign. These can be deleted using the Outbound Manager.

  Or

- There are any reports set up for the Campaign. These can be deleted using the Campaign Manager, see 'Deleting Reports and Schedules' below.

The following takes place when this option is selected:

1. Transaction files for this Campaign are deleted from the Transactions folder on the Server.

2. All CallFlow tables are deleted – those prefixed with the three-letter Account-prefix and two-digit Campaign-prefix, e.g. ABC01_Main (Phoenix database), including the _CALL_RESULT table)

3. Data is deleted from Phoenix_Event table (Phoenix database).
4. Data is deleted from Phoenix_Sequence table (Phoenix database).
5. Data is deleted from Phoenix_Release table (Phoenix database).
6. Data is deleted from Phoenix_Invoice table (Phoenix database).
7. Data is deleted from Phoenix_DDI table (Phoenix database).
8. Data is deleted from Phoenix_Search table (Phoenix database).
9. Data is deleted from Phoenix_Campaign table (Phoenix database).

The above is then repeated for the Phoneyx (Design) database.

The Campaign icon disappears from the Campaign Manager.

Deleting Reports and Schedules

Reports and Report Schedules are deleted via the Campaign Manager. With the 'Report Properties' dialog showing in the Campaign Manager, pressing the 'Delete' button will delete the report.

The user will be prevented from deleting the report if the report has any run 'Schedules' set up. Schedules can be deleted by selecting the 'Schedule' icon for the report and clicking on the 'Delete' button.

When a Report is deleted:

1. The Report is deleted from Phoenix_Report.
2. The Report icon in Campaign manager disappears.

When a report 'Schedule' is deleted:

1. Data from Phoenix_Report_Run table is deleted for this Schedule.
2. The Schedule is deleted from Phoenix_Schedule table.
3. The Schedule icon in Campaign manager disappears.

DIAGRAMS OF DATA MODULE

Synthesys ‘Basic’ Data Module

Synthesys ‘Personnel’ Data Module

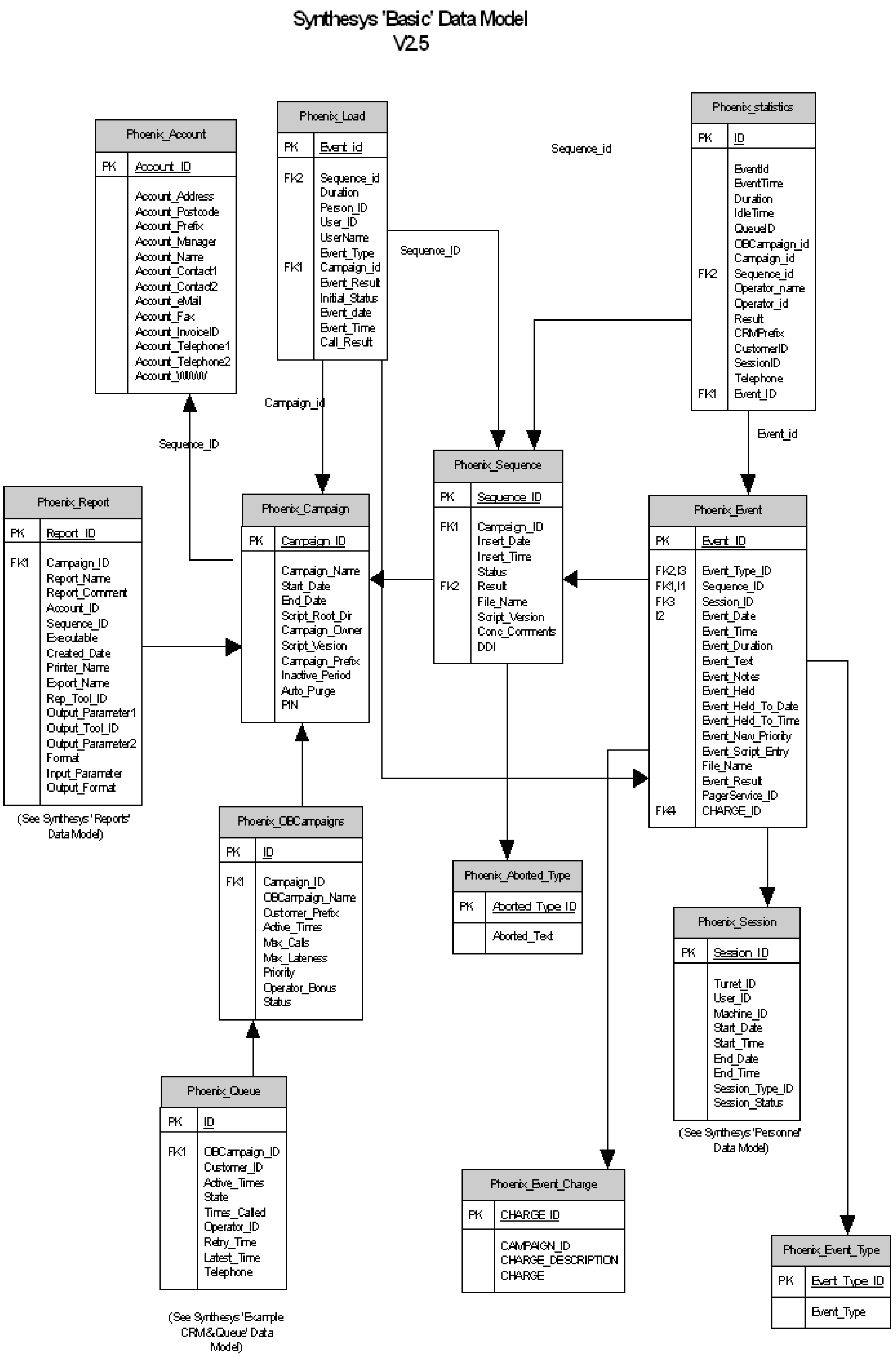
Synthesys ‘Reports’ Data Module

Synthesys ‘Example Rotas’ Data Module

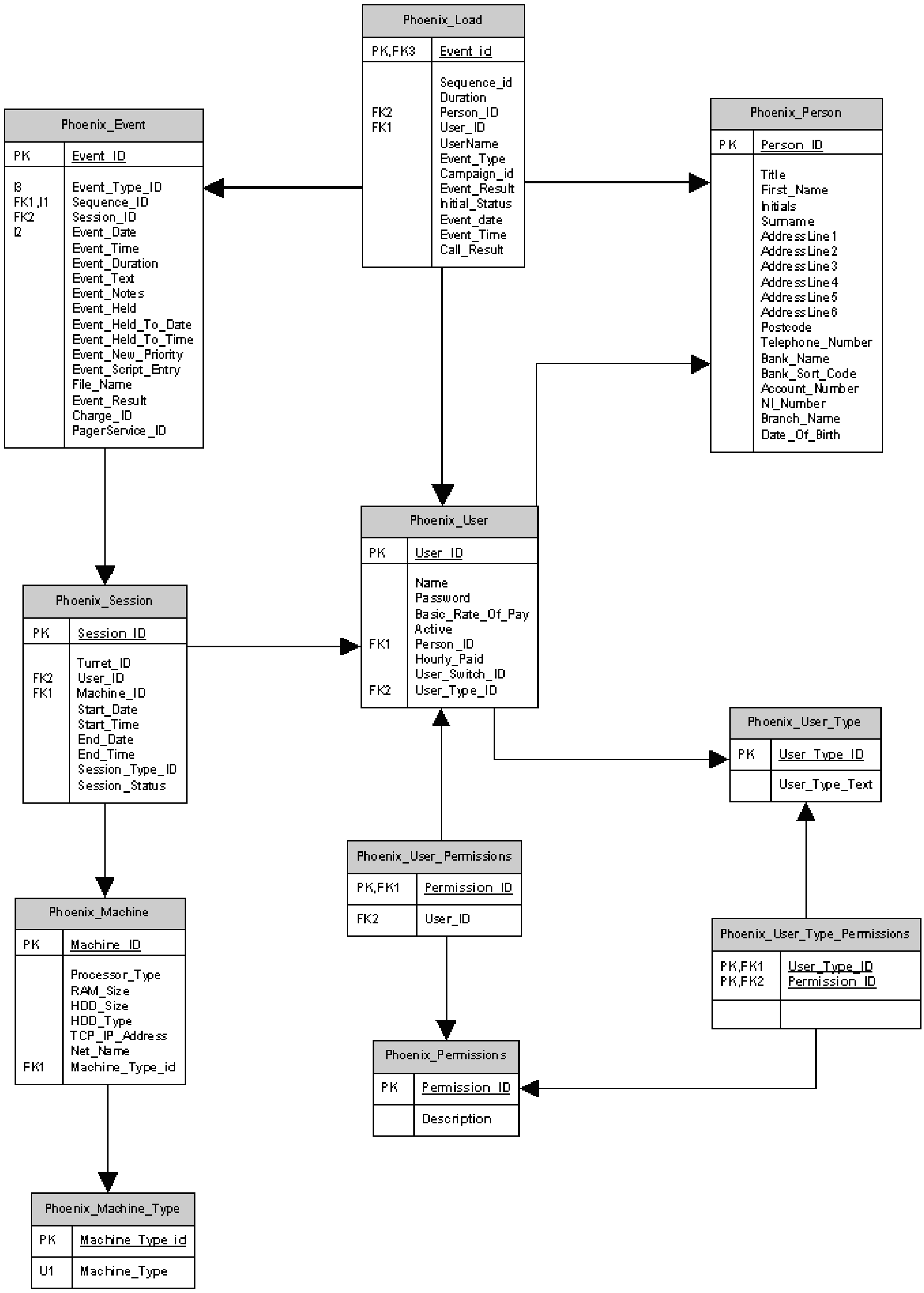
Synthesys ‘Example Campaign’ Data Module

Synthesys ‘Example CRM & Queue’ Data Module

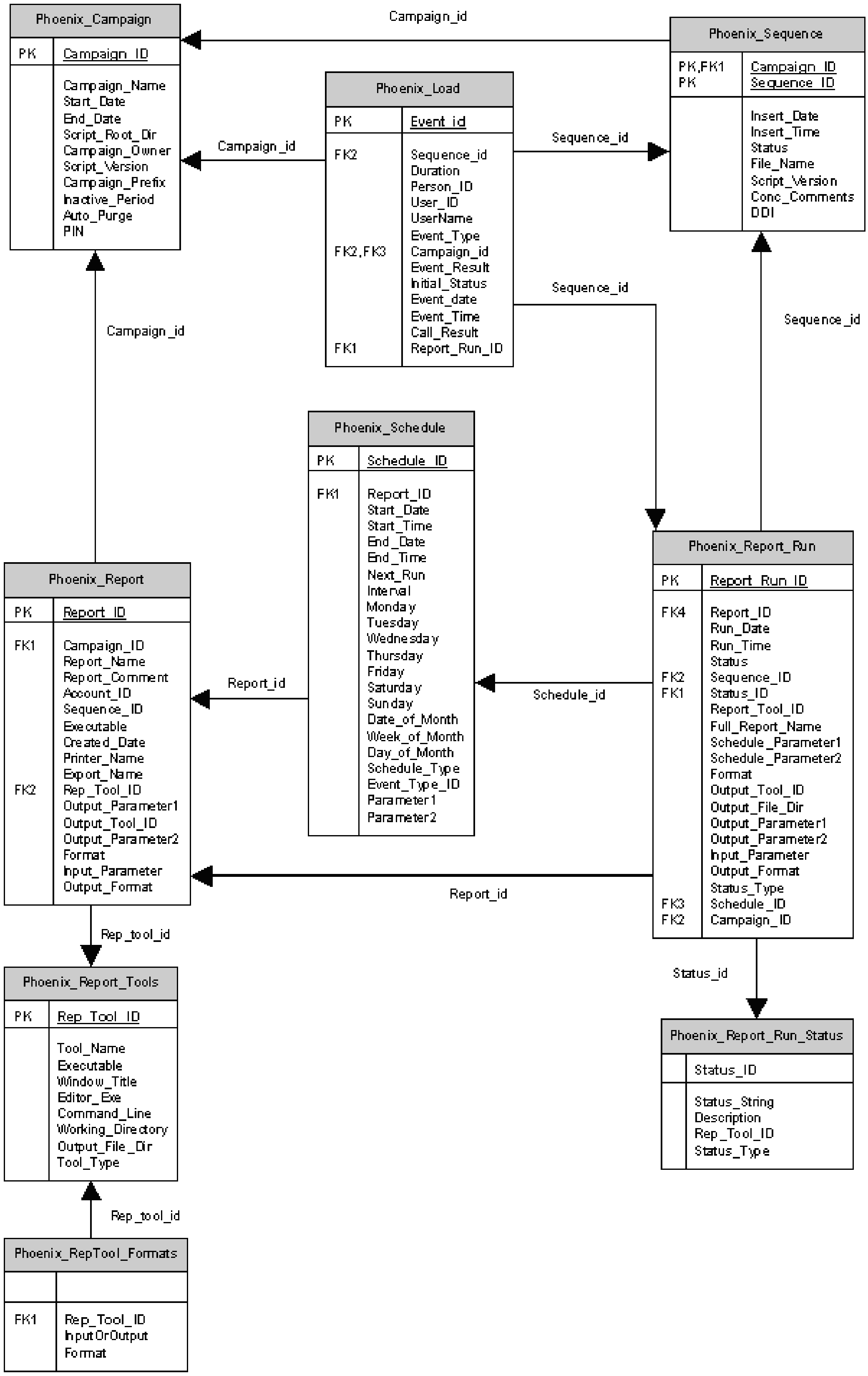
Synthesys ‘Teams’ Data Module


Synthesys 'Basic' Data Model
V2.5
Phoenix_Account
PK Account_ID
Account_Address
Account_Postcode
Account_Prefix
Account_Manager
Account_Name
Account_Contact1
Account_Contact2
Account_eMail
Account_Fax
Account_InvoiceID
Account_Telephone1
Account_Telephone2
Account_WWW
Phoenix_Load
PK Event_id
FK2 Sequence_id
Duration
Person_ID
User_ID
UserName
Event_Type
FK1 Campaign_id
Event_Result
Initial_Status
Event_date
Event_Time
Call_Result
Sequence_id
Sequence_ID
Phoenix_statistics
PK ID
EventId
EventTime
Duration
IdleTime
QueueID
OBCampaign_id
Campaign_id
FK2 Sequence_id
Operator_name
Operator_id
Result
CRMPrefix
CustomerID
SessionID
Telephone
FK1 Event_ID
Campaign_id
Sequence_ID
Event_id
Phoenix_Report
PK Report_ID
FK1 Campaign_ID
Report_Name
Report_Comment
Account_ID
Sequence_ID
Executable
Created_Date
Printer_Name
Export_Name
Rep_Tool_ID
Output_Parameter1
Output_Tool_ID
Output_Parameter2
Format
Input_Parameter
Output_Format
(See Synthesys 'Reports' Data Model)
Phoenix_Campaign
PK Campaign_ID
Campaign_Name
Start_Date
End_Date
Script_Root_Dir
Campaign_Owner
Script_Version
Campaign_Prefix
Inactive_Period
Auto_Purge
PIN
Phoenix_Sequence
PK Sequence_ID
FK1 Campaign_ID
Insert_Date
Insert_Time
Status
FK2 Result
File_Name
Script_Version
Conc_Comments
DDI
Phoenix_Event
PK Event_ID
FK2,I3 Event_Type_ID
FK1,I1 Sequence_ID
FK3 Session_ID
I2 Event_Date
Event_Time
Event_Duration
Event_Text
Event_Notes
Event_Held
Event_Held_To_Date
Event_Held_To_Time
Event_New_Priority
Event_Script_Entry
File_Name
Event_Result
PagerService_ID
FK4 CHARGE_ID
Phoenix_OBCampaigns
PK ID
FK1 Campaign_ID
OBCampaign_Name
Customer_Prefix
Active_Times
Max_Calls
Max_Lateness
Priority
Operator_Bonus
Status
Phoenix_Aborted_Type
PK Aborted_Type_ID
Aborted_Text
Phoenix_Session
PK Session_ID
Turret_ID
User_ID
Machine_ID
Start_Date
Start_Time
End_Date
End_Time
Session_Type_ID
Session_Status
(See Synthesys 'Personnel' Data Model)
Phoenix_Queue
PK ID
FK1 OBCampaign_ID
Customer_ID
Active_Times
State
Times_Called
Operator_ID
Retry_Time
Latest_Time
Telephone
(See Synthesys 'Example CRM&Queue' Data Model)
Phoenix_Event_Charge
PK CHARGE_ID
CAMPAIGN_ID
CHARGE_DESCRIPTION
CHARGE
Phoenix_Event_Type
PK Event_Type_ID
Event_Type

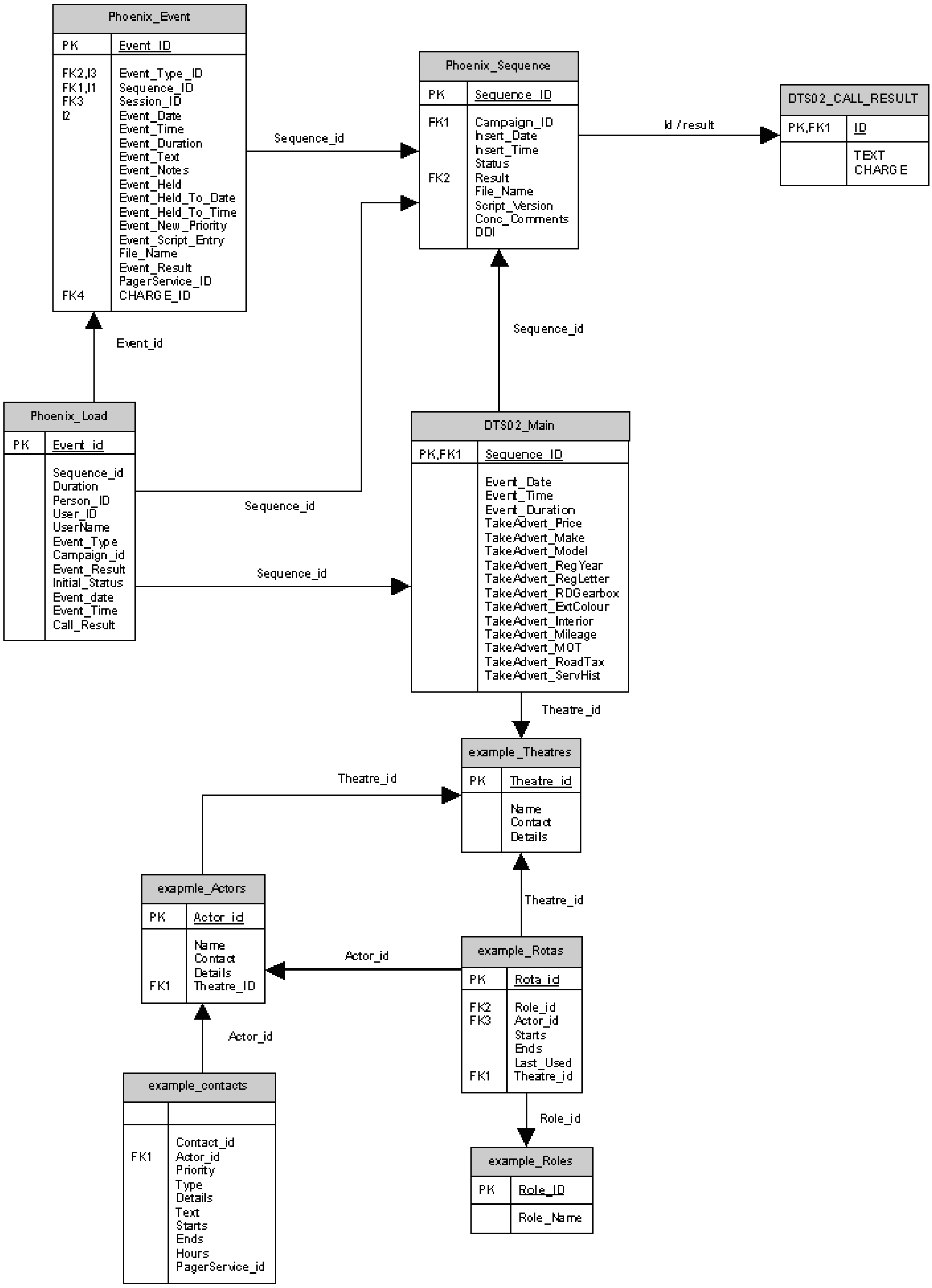
Synthesys 'Personnel' Data Model 2.5



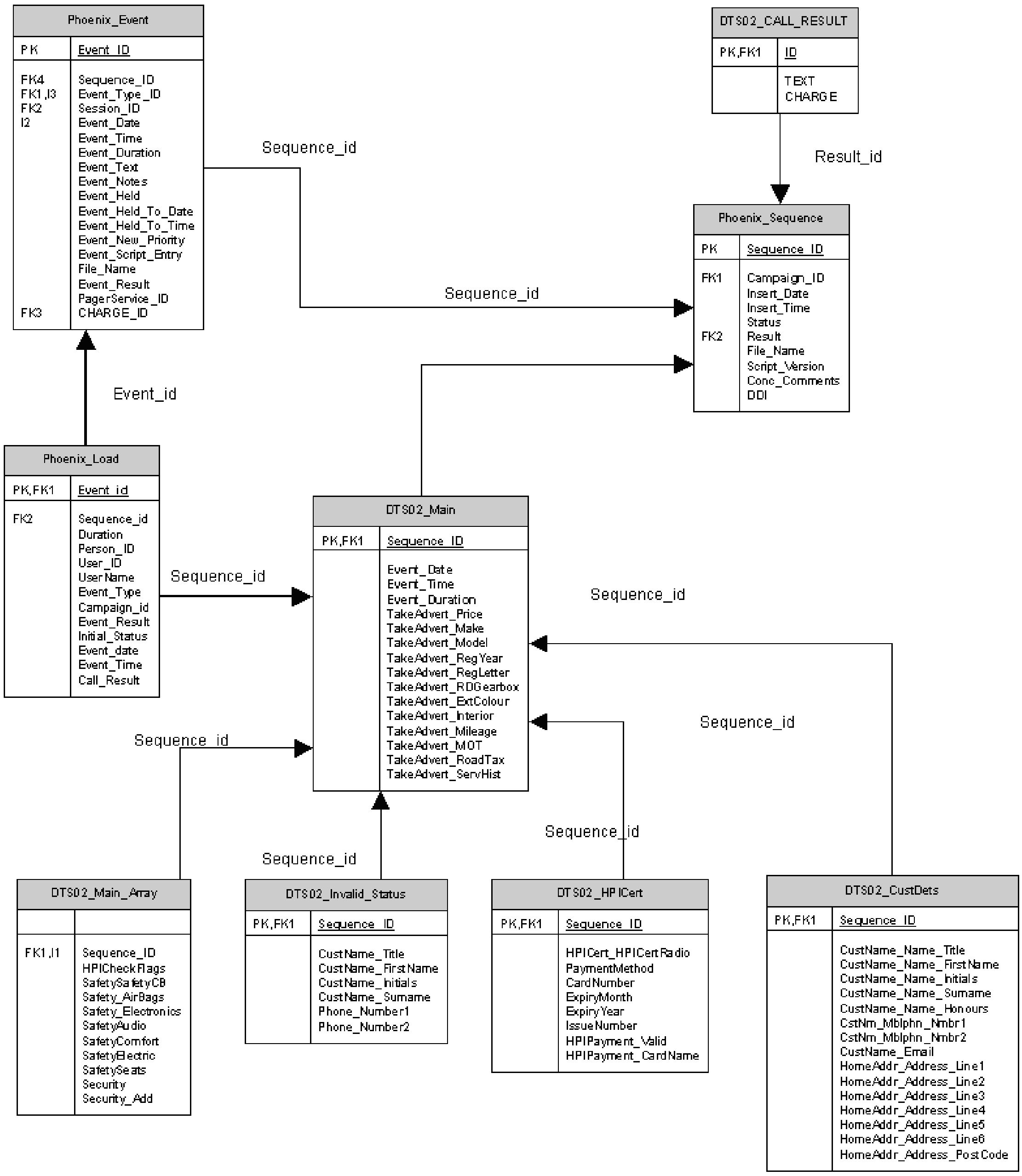
Synthesys 'Reports' Data Model
2.5



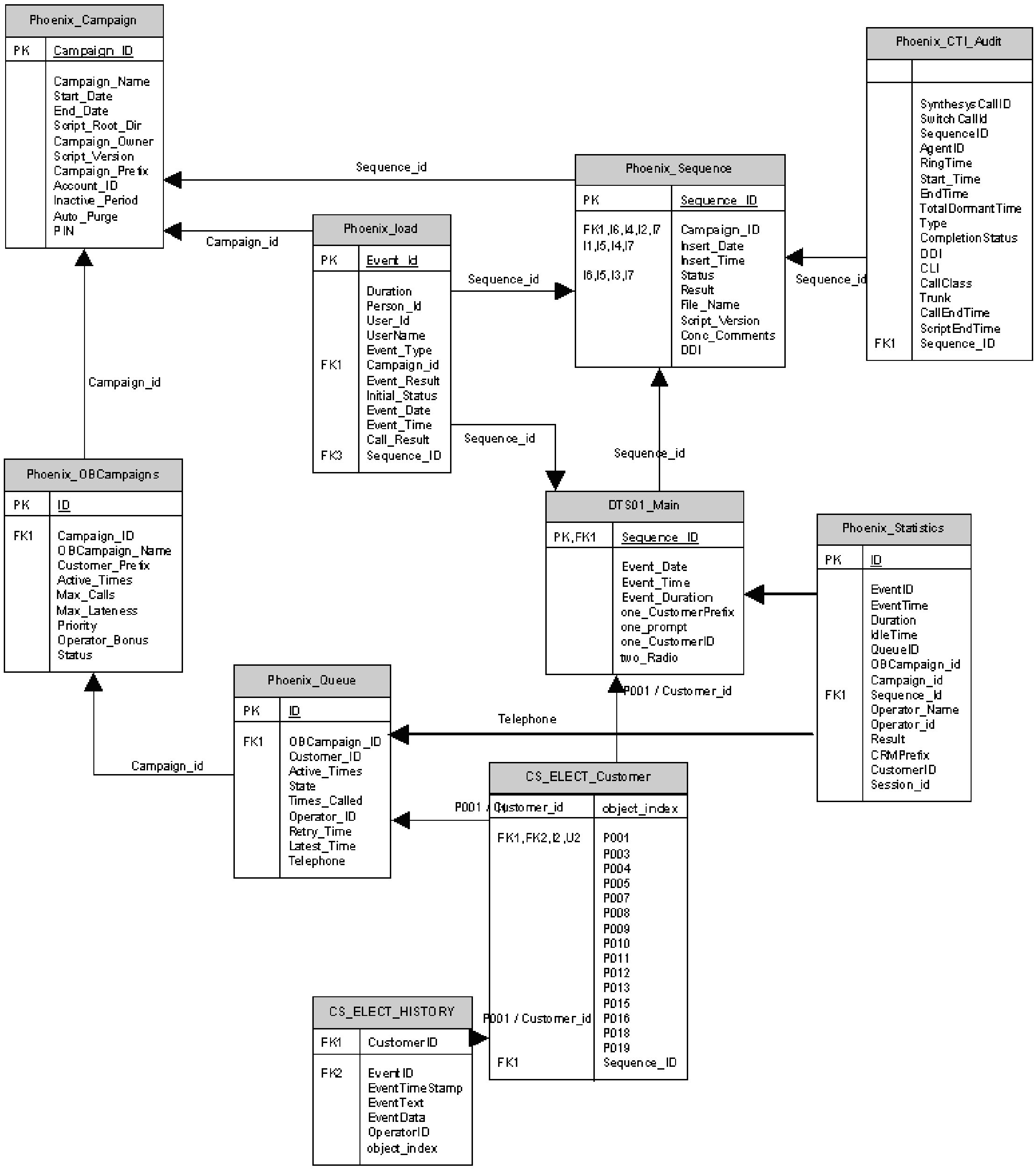
Synthesys 'Example Rotas' Data Model
2.5



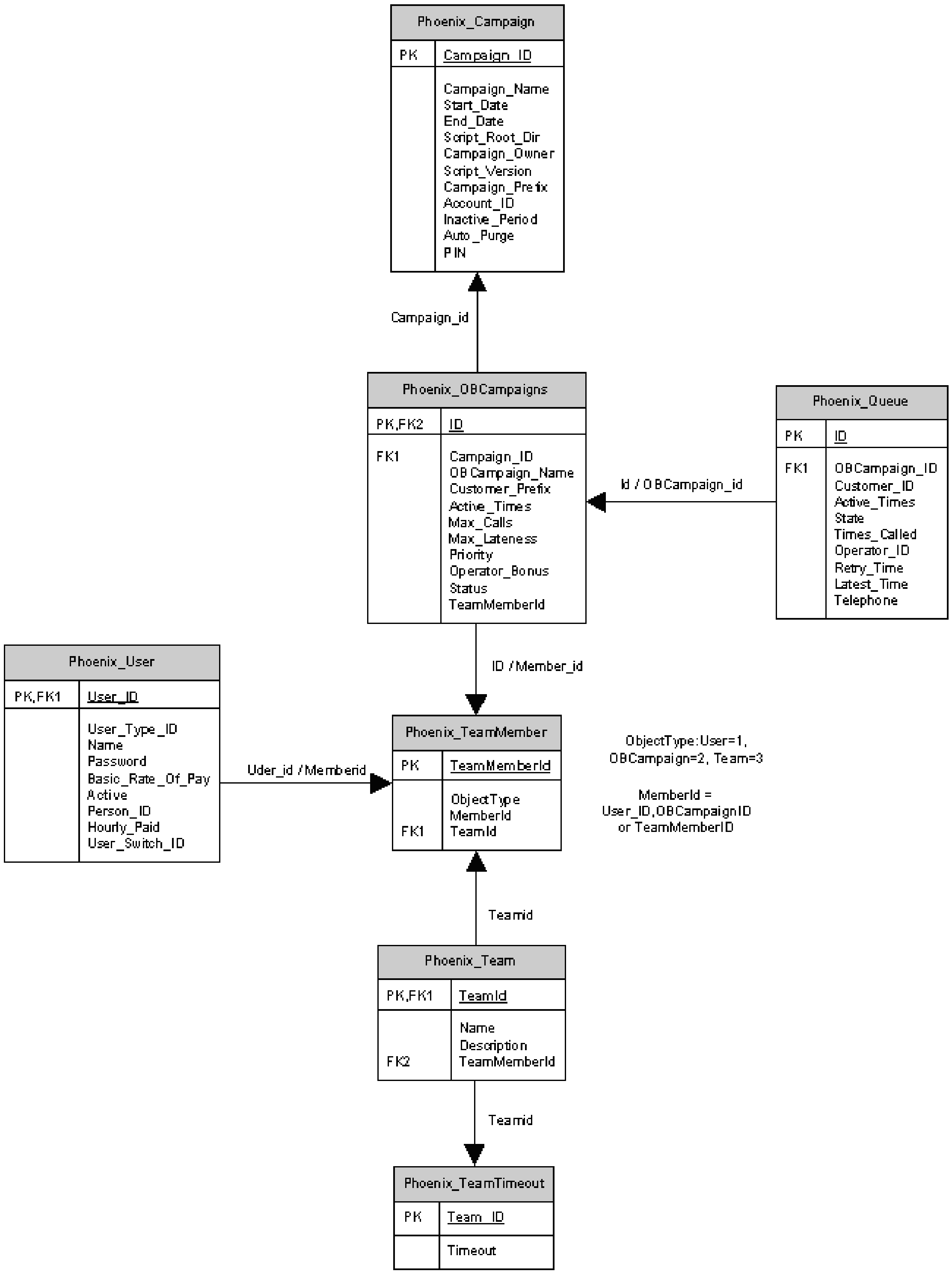
Synthesys 'Example Campaign' Data Model
2.5



Synthesys 'Example CRM & Queue' Data Model
2.5



Synthesys 'Teams' Data Model
2.5



NOTES

NOTES