SYNTHESYS CAMPAIGN MANAGER

Setup - Reports

Managing Reports and Report Schedules

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Managing Accounts & Campaigns

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Ready	Delete Cancel



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Software Release Version 4.4

Document Version: 1.0

Last updated April 2015

Prepared by Brigitte Reimer

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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 lifecycle 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 predetermined 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.



CAMPAIGN EDITOR BASICS

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.



DATABASES & SQL

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

<u>P</u> rovider:	Microsoft OLE DB Provider for DTS Package ▲ Microsoft OLE DB Provider for Indexing Serv Microsoft OLE DB Provider for Internet Publis Microsoft OLE DB Provider for OLDP Services Microsoft OLE DB Simple Provider MSDataShane
<u>U</u> se Data Link File:	
Microsoft Data Link File:	
< Back Next>	Finish Cancel Help



Fill in the details as requested.

Server is you SQL Server Database is Phoenix

DB (ADO)			
Connection Informatio Provide necessary inf	n ormation to log on to the o	chosen data source.	
<u>S</u> erver:	London		•
Us <u>e</u> r ID:	synthesys		
Password:	NERENEE		
<u>D</u> atabase:	Phoenix		•
Integrated Security:			

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'.

🖺 Data Explorer	×
Phoenix.dbo.TBC01_CALL_RESULT Phoenix.dbo.TBC01_Cash Phoenix.dbo.TBC01_Cash Phoenix.dbo.TBC01_Cash_Array Phoenix.dbo.TBC01_ChequeP0 Phoenix.dbo.TBC01_ChequeP0 Phoenix.dbo.TBC01_NeQs Phoenix.dbo.TBC01_NoProb Phoenix.dbo.TBC01_NoProb Phoenix.dbo.TBC01_NoProb Phoenix.dbo.TBC01_NoProb Phoenix.dbo.TBC01_NoPros Phoenix.dbo.TBC01_NoTried Phoenix.dbo.TBC01_NotWork	Add to Eavorites
Data Explorer Browse through the folders to find your data source's tables. Select and Add tables that contain data you want to report on. You can also double-click a table to add it.	Qptions Help 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.

Phoenix, Statistics D ID EventID EventIme Duration IdleTime QeueuED OBCampaign_ID Campaign_ID Generator_ID Operator_ID Result CRMPrefix CustomerID SessionID Telephone PreviousState	TBC01_Main Sequence_ID Event_Date Event_Time Event_Time Event_Time Event_Ourdton Introd_Mt_CustomerPrefix Introd_Mt_CustomerID Applance_Applance_Value Applance_Text_Value Problem_Problem_Value PayMent_Card_Value PayMent_Card_Value Pay_Payment_CardNumber Pay_Payment_CardNumber Pay_Payment_SueNumber Pay_Payment_SueNumber Pay_Payment_SueNumber Pay_Payment_Valud	TBCO1_Gold Sequence_ID Gold_Text_Value Gold_Text CS_ELECT_Customer_VIEW Customer ID Title Surname Line1 Line2 Line3 Line4 PostCode Number1 ChoicesMade	Auto-Arrange Auto-Link O By Name By Key Link Older Links Qlear Links Qelete Link Link Options Index Legend
--	--	--	--

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.

💾 Select Expert			×
TBC01_Main.Event_Date <n< td=""><td>ew></td><td></td><td></td></n<>	ew>		
is in the period	WeekToDateFromSun WeekToDateFromSun MonthToDate YearToDate ast7Daus		<u>N</u> ew D <u>e</u> lete <u>B</u> rowse
OK Cancel	Last4WeeksToSun LastFullWeek LastFullMonth AllDatesToToday AllDatesToYesterday	Shou	v Formula >>>

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.

Parameter Field		
<u>N</u> ame:	Sequer	ice ID
Prompting text:		
⊻alue type:	String	
Options		
Allo <u>w</u> multiple values		<u>S</u> et default values
Discrete value(s)		
C Range value(s)		Allow editing of default values when
C Disgrete and Range	Values	there is more than one value

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.

💾 Select Expert		×
TBC01_Main.Sequence_ID	(New>	
is equal to 💌		▼ <u>N</u> ew
	{?Sequence ID}	D <u>e</u> lete
	19990802-164413-001TSB0 19990802-164918-001TSB0 20010604-123816-004MAL0 20010604-123949-004MAL0 20010604-123910-004MAL0	Browse
OK Cancel	20010604-124524-004MAL0 20010604-125250-004MAL0 20010604-125538-004MAL0	v Formula >>>

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.

🔀 Campaign Manager	
<u>File View H</u> elp	
💾 🗢 🚳 🛃 🚯 🕐	
Al Accounts Accounts	Report Properties Report Name Report Name Comment This is an instant report Full Name VServerName/Synthesys/Reports/AccountName/veportFile Created Date 24/09/2009 Browse Reports Report Tool Crystal Service Printer/Export File Name (e.g. 2dSm2y for dated filenames) \VServerName/Synthesys/Reports/AccountName/veportFile doc Output Service Image: Comment of the service of the service of the service Parameteri From Address Parameteriz To Address Parameteriz Delete Edit Report
Ready	

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

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:Wyfile.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:

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



Elle Yiew Help	
H	
A Accounts A Accounts B A Accounts B DaR Paroll B DTS Demonstrationand trainingScripts B DT Telebusiness Califlows B DTS Demonstrationand trainingScripts B DT Telebusiness Califlows B DTS Demonstrationand trainingScripts Comment Any relevant comments Full Name (SynthesystReports/AccountName/veportfile B DTS Demonstrationand trainingScripts Full Name (SynthesystReports/AccountName/veportfile Created Date (24/09/2009 Report Tools D Dtput Service D Dtput Service D Dutput Service Parameter1 From Address Parameter2 C Table.Column: ACCD1_Main.SectionName_ControlName> Parameter2 C Table.Column: ACCD1_Main.SectionName_ControlName>	

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 window now displayed; select HTML 4.0 (DHTML) from the drop down menu.

Export	×
<u>F</u> ormat:	ΟΚ
HTML 4.0 (DHTML)	
HTML 4.0 (DHTML)	Cancel
Lotus 1-2-3 (WK1)	
Lotus 1-2-3 (WK3)	Help
Lotus 1-2-3 (WKS)	
ODBC - CROR8V36	-

On clicking OK the required software will be installed automatically.





SYNTHESYS CAMPAIGN MANAGER

Year Help Elle Year Help Help	
All Accounts DTS DemonstrationandTrainingScripts DTS Demonstrating DTS DemonstrationandTraining DTS DemonstrationandTrainin	Report Properties Report Name Report Name ID 2 Comment This is an instant report 2 Comment This is an instant report Edit Name \ServerName\Synthesys\Reports\AccountName\reportfile Browse Reports Full Name \ServerName\Synthesys\Reports\AccountName\reportfile Browse Reports Report Tool Crystal Service Format Word Image: Service Output Service Output Service Image: Service Image: Service Image: Service Parameter1 From Address Parameter2 To Address Image: Service Image: Service Save Delete Edit Report Edit Report Image: Service Image: Service

Report Schedule

<u> </u>	Schedule Wizard
You have now so information below reports	heduled Order Request report to run. Please check that the is correct, particularly the next run date and time fields for timed
Frequency	specific days of the week
Next Run Date	Friday, 25 Sep 2009
Next Run Time	18:30
Parameter 1	<yesterday></yesterday>
Parameter 2	
Schedule detail	Monday,Wednesday,Friday,

Report Details



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 Phoenix_Campaign Phoenix_Report Phoenix_Schedule Phoenix_Report_Run Phoenix_Report_Tools holds Account information holds Campaign information for these Accounts holds Report information for these Campaigns holds Schedule information for these Reports holds Report Run information about the Reports 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:

🖄 Campaign Manager	
File View Help	
💾 🗢 🛞 🔡 😗	
BRI Brighte Examples BRP Brighte Report BRP Brighte Report BTI Brighte Data Difference Content	Account Details Account Name [Demonstrationsof] rainingScripts Prefix [DTS Address: Suite 45-47
DDN DaveN DDN DaveN DDN DemonstrationandTrainingScripts Pop 01 Message Service DDN 02 SwiftLifts DDN 03 Marketing DDN 04 Donation	The Hop Enchange, 24 Southwark Steet London
Of Donation Request Of Email Handling	Postcode: SET ITTY Account Manager: Admin Main Contact: Brighte Reimer Telephone: 0044 845 0181070
B - B -	Other Contact Telephone: Fax: 044 20 7403 4159
🗄 🏹 SUJ Su Jordan	E-mait office@noetica.com
TBC Telebusiness Califlows TRN TRAINING TRN TRAINING	Web Site: www.noetica.com
C C C C C C C C C C C C C C C C C	Save Delete
Ready	

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:

🔀 Campaign Manager	
Eile <u>V</u> iew <u>H</u> elp	
💾 🗢 🚳 🛃 🕓 🕐	
Al Accounts Sound Stafds DTS DemostrationandTrainingScripts DTS DemostrationandTrainingScripts DTS Demostration DS SwithLifts DS Marketing Sos Stafds Staf WAL Water WAL Water Report Tools	Campaign Datails Campaign Name Product Dider Start Date 13/08/2009 End Date 01/01/2525 Campaign ID Campaign Prefix O Script Root Directory Script Not Directory Script Root Directory Script Root Directory Record full Aborted Call information in DB Save Delete
Ready	



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.

🔀 Campaign Manager	
Eile ⊻iew <u>H</u> elp	
💾 👓 🚳 🗮 🕓 🧿	
All Accounts All Schedule Al	Report Properties Report Name ID 2 Comment This is an instant report ID 2 Full Name \\ServerName\Synthesys\Reports\AccountName\reportfile ID 2 Created Date 24/09/2009 Browse Reports Report Tool Crystal Service Format Word Image: Created Date Service Printer/Export File Name (e.g. %d%m%y for dated filenames) \\ServerName\Synthesys\Reports\AccountName\reportfile doc Output Tool Email Service Image: Created Date Service Image: Created Date Service Parameter1 From Address Parameter2 To Address Parameter2 To Address Edit.Report
Ready	

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 Comment Full Name	Contains any name to identify your report Any comment about the report 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 <u>\\c\folder\%d%m%y.txt</u> can be used to create different filenames on different days. This will produce a file called <u>\\c\folder\210599.txt</u> 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>.</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 (;).</kim.constantine@noetica.com>
	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.

Campaign Manager	
All Accounts All Accounts All Accounts Accounts All Accounts Accounts	Campaign Details Campaign Name Product Order Start Date 13/08/2009 End Date 01/01/2525 Campaign D 7 Campaign Preitx 04 Says) 30 ersion 10 PIN etopy Scripts/DTS/04 Dwmer Brighte Hecord full Aborted Call information in DB

Entering a Name for the Report

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

SYNT	H E S Y S Report Wizard
Welcome to the Synthe will guide you through th report. Enter a name for this re Manager	esys Report Wizard. This wizard he options for setting up your port to display in the Campaign



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.

	Report Wizard	
Select the Report Tool to c Crystal Service	reate your report	Tr dr
	ior this report	
Enter a path and filename f	ports/Crystal 9 Testing/Report1.rpt	

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.

Select Report Output	
S Y	Y N T H E S Y S Report Wizard
f	Please select what you would like to happen to this eport once it has run.
	Judput rype E-mail ▲ Take No Action E-mail Fax Print Run Application (EXE) < Back Next > Finish Cancel



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.

Specify E-mail [Details	×
	SYNTHESYS Report Wizard	
	Enter the e-mail details of who is sending and who is receiving this report From address:	
	Enquiries@noetica.com	
	To address: (separate multiple recipients with a semi-colon).	
	Training@noetica.com	
	Comments (this will appear in the top of the email body)	
	Next meeting	
	< <u>B</u> ack <u>N</u> ext > Finish Cancel	

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.

		Report Wizard
Please	elect a filename ar	nd format for this report
Please select fo	mat for this report	
Text	-	
Excel	_	
PDF		
TIF Word		



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'.

end Report a	s Attachment	>
	SYNTHESYS <i>Report Wizard</i>	
	Do you want to send this report as an attachment or in the body of the email?	
	 <u>Attachmeni</u> In Body 	
	< <u>B</u> ack <u>N</u> ext > Finish Cance	el

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.

Specify Fax Det	ails	×
80g +*	SYNTHESYS Report Wizard	
	Enter the details of who is sending and who is receiving this report	
	Sender's name	
	Synthesys Autofax	
	Recipient's name	
	Comments	
	Fax number	
	<u> < B</u> ack <u>N</u> ext > Finish Cance	

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.

🗳 SY	N T H E S Y S Report Wizard
Dia	lasta filmana and famatin di sana
Flease se	iect a niename and rormat for this report
Please select form	hat for this report
Use default locat	ion or enter a specific location
\\Reddevil\Synt	nesys\Reports\BrigitteOct\outputfile.csv
	Browse

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 <u>\\c\folder\%d%m%y.txt</u> can be used to create different filenames on different days. This will produce a file called <u>\\c\folder\210599.txt</u> 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.

eport is to run
y
aj y

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.

Specify Monthly Period	×
SYNTHESYS Schedule Wizard	
Please select when you want the report to run	
Day I of the month the last day of the month	
C the first ▼ Monday ✓ Monday ✓ Tuesday ✓ Wednesday ✓ Thursday ✓	
< <u>Back</u> Next> Finish Cancel	



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.

Please si Available results	elect the Call Results for which this r	eport is to be run	
<all call="" results=""> Finish Brochure Enquiry SalesVisit</all>	Add >>	Irder	

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.

SYN	ΓΗΕSΥS
•	Schedule Wizard
Are there any additional p	arameters you would like to pass to the report?
Parameter 1 (Yesterd	lay>
∠Yesterd ∠Todau>	lay>
Parameter 2	_
Note: you can se	ect a parameter from the list or type
in one of your owr	n

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.

ichedule Summary		2
S 📫	Y N T H E S Y S Schedule Wizard	
You have now so information below reports.	heduled Order Request report to run. Please check that the is correct, particularly the next run date and time fields for timed	
Frequency	specific days of the week	
Next Run Date	Friday, 25 Sep 2009	
Next Run Time	18:30	
Parameter 1	<yesterday></yesterday>	
Parameter 2		
Schedule detail	Monday,Wednesday,Friday,	
	< Back Next> Finish Cancel	



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.

🔀 Campaign Manager	
Eile <u>V</u> iew <u>H</u> elp	
💾 🗠 🗟 🔀 🕲 🕐	
All Accounts All Accounts All Accounts All Accounts BEX Brighte Training BEX Brighte Training BEX Brighte Training BEX Brighte Training D (1 Chy Breaks D (1 C	Schedule information for Schedule ID 16 Frequency Monthly Next Run Date Thursday, 01 Oct 2009 Next Run Time 16:45 Parameter1 Parameter2
Ready	

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	Туре	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 Filter		
Please tick the ap report runs	propriate boxes to filter ;	your results, or press OK to view the latest
🔽 Status	Status Name	Crystal Service - Unknown format 💌
	C Status 🗖 Statu	Cystal Service - Unknown format Crystal Service - Invalid Report Run Crystal Service - Timed Dut Crystal Service - Failed to Start Crys Crystal Service - Invalid number of c
🔽 Account / 0	Campaign	
	C Account Name	Brigitte Training (BTR)
	Campaign Name	BR OBWizard (ID:65)
🔽 Run Dates	C Before ● Between	11 September 2009 and 14 September 2009
	ОК	Cancel

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'.



Campaign Manager	
Image: Second	Re Sc Date Time Status Sequence ID 81 2 08/09/09 1512 SQI Service - Finished 64 Edit Report Run Image: SQI Service - Finished 61 Report Name BR Scheduled SQI Report Run 55 Status SQI Service - Finished 51 Run Date Off/08/09 Run Time 64 Report Name BR Scheduled SQI Report Run 74 Schedule No. (2 Sequence ID 42 Report Location SQI 40 Report Tool SQI Service Format 32 Schedule ParameterI Schedule ParameterI 32 Schedule ParameterI Schedule ParameterI 94 ParameterI ParameterI 95 Save and Close Cancel
Pondu	

• 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** (1) 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.

🔀 Campaign Manager	
<u>File ⊻iew H</u> elp	
💾 🗠 🛞 🛃 🕓 🥐	
All Accounts All Accounts All Accounts All Accounts All Accounts All Accounts All Schedule All Schedule All Schedule All Schedule All Schedule All Schedule WAL Walter WAL Walter All Schedule All Schedu	Report Properties Report Name AutoReply ID Z Comment Any relevant comments Full Name \\ServerName\Synthesys\Reports\AccountName\reportFile Created Date 24/09/2009 Browse Reports Report Tool Crystal Service Format CSV Printer/Export File Name (e.g. %d%m%y for dated filenames) \\ServenName\Synthesys\Reports\AccountName\reportFile.csv /BDDY1 Output Service Image: Colspan="2">Output Tool Parameter1 Frim Address Parameter1 Frim Address Parameter2 To Address Save Delete Edit Report
Ready	



<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



	Report Properties
Report Name	Report Name ID 253
Comment	Any relevant comments
Full Name	\\Reddevil\Synthesys\Reports\TestReport.rpt
Created Date	01/03/2006 Browse Reports
Report Tool	Crystal Service Format Text
	Printer/Export File Name (e.g. %d/sm/sy for dated hienames) \\Reddevil\Synthesys\Reports\TestReport.txt
Cutput Ser	Printer/Export File Name (e.g. %d%m%y for dated filenames) \\Reddevil\Synthesys\Reports\TestReport.txt vice
Output Ser Output Tool	Printer/Export File Name (e.g. %d/sm/sy for dated hienames) \\Reddevil\Synthesys\Reports\TestReport.txt vice Email Service
Output Ser Output Tool Parameter1	Printer/Export File Name (e.g. %d/sm/sy for dated hienames) \\Reddevil\Synthesys\Reports\TestReport.txt vice Email Service From Email Address

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>

	Report Properties
Report Name	ReportName ID 307
Comment	Any relevant comments
Full Name	\\Reddevil\d\Synthesys\Reports\Report2.rpt
Created Date	02/03/2006 Browse Reports
Report Tool	Crystal Service Format HTML
	Printer/Export File Name (e.g. %d%m%y for dated filenames) \Report2.html /BODY <attach:<table.column:cal05_main.b_tel_number1>></attach:<table.column:cal05_main.b_tel_number1>
Cutput Ser	vice
Output Tool	Email Service
Parameter1	From Email Address
Parameter2	To Email Address
	Save Delete Edit Report

Edit Report Ru	n	x
Report Name	New Report Run ID 261660	
Status	Crystal Service - Finished	
Run Date	02/03/06 Run Time 11:14	
Schedule No.	408 Sequence ID	
Report Location	\\reddevil\d\Synthesys\Reports\Brigitte\Test.rpt	
Report Tool	Crystal Service Format HTML	
Report Parameter	ynthesys\Reports\Brigitte\Test.html <attach:d:\myfile.txt></attach:d:\myfile.txt>	
Schedule Para	ameter1	
Schedule Para ⊢Output Service	ameter2	
Output Tool		
Parameter1	anyone@noetica.com	1
Parameter2	brigitte@noetica.com	
Sa	ave and Close Cancel	



<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.

	Report Properties
Report Name	ReportName ID 307
Comment	Any relevant comments
Full Name	\\Reddevil\d\Synthesys\Reports\Report3.rpt
Created Date	02/03/2006 Browse Reports
Report Tool	Crystal Service Format HTML
	Printer/Export File Name (e.g. %d%m%y for dated filenames) \Report3.html /BODY <addtop:d:\myfile.txt></addtop:d:\myfile.txt>
Cutput Ser	vice
Output Tool	Email Service 💌
Parameter1	From Email Address
Parameter2	To Email Address
9	Save Delete Edit Report

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@DomainNameExample:Julie.Smith@context.co.uk

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

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.

	Report Properties
Report Name	ReportName ID 307
Comment	Any relevant comments
Full Name	\\Reddevil\d\Synthesys\Reports\Report3.rpt
Created Date	02/03/2006 Browse Reports
Report Tool	Crystal Service Format HTML
┌ Output Ser	Printer/Export File Name (e.g. %d%m%y for dated filenames) \Reddevil\d\Synthesys\Reports\Report3.html /B0DY <addt0p:d:\myfile.txt> vice</addt0p:d:\myfile.txt>
- Output Ser Output Tool	Printer/Export File Name (e.g. %d%m%y for dated filenames) \Reddevil\d\Synthesys\Reports\Report3.html /B0DY <addt0p:d\myfile.txt> vice Email Service</addt0p:d\myfile.txt>
- Output Ser Output Tool Parameter1	Printer/Export File Name (e.g. %d%m%y for dated filenames) \Reddevil\d\Synthesys\Reports\Report3.html /BODY <addtop:d:\myfile.txt> vice Email Service anyone@noetica.com</addtop:d:\myfile.txt>



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<<u>Kim.Constantine@noetica.com</u>>



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>>

	Report Properties
Report Name	ReportName ID 307
Comment	Any relevant comments
Full Name	\\Reddevil\d\Synthesys\Reports\Report3.rpt
Created Date	02/03/2006 Browse Reports
Report Tool	Crystal Service Format HTML
	Printer/Export File Name (e.g. %d%m%y for dated filenames) port3.html /BODY <subject: <table.column:bri01_main.refno="" is="" ref="" your="">></subject:>
_Output Ser	vice
Output Tool	Email Service 💌
Parameter1	anyone@noetica.com
Parameter2	Julie Smith <julie.smith@company.co.uk></julie.smith@company.co.uk>
S	iave Delete Edit Report



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. <u>//server/d/synthesys/reports/aCampaign/areport/MyReport.html</u>

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 <u>\\synthesys\spool\email\245</u> 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. <u>\\server\d\synthesys\reports\aCampaign\MyReport.html</u>

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

Campaign Manager		_ 🗆 🗙
All Accounts		
All Accounts ■ All Accounts ■ All All Manz ■ Bool Sengtheon ■	Campaign Tuettains Campaign Name Charpaign Name CrMText April Start Date 07/04/2011 End Date Start Date 07/04/2011 End Date Campaign ID 1280 Campaign Prefix Script Version 7.0 PIN Script Version Script Version Script Version Campaign Owner None	
	Record full Abouted Call information in DR	
DD DB ServiceTest		
OF Redycling SpaceTel		
	Enter HTML Email	
OI CRMTest March11	From address: HTMLEmail@noetica.com	
Brie Posic Onicia Call How Brie Posic Onicia Call How Brie Posic Onicia Call How Call Call How Call How Call C	Io address: < <emailaddress>></emailaddress>	< <calculations>></calculations>
Bar Brighte Test Bor Brighte Test Bor Brighte Test Bor Brighte Test Bor Brenford Dr Bor Brighte Tell Remove Intermedia	To < <customer>> Please read the attached document.</customer>	
Assign telephone n Report Wizard Add New Report	<pre>4 4HTML> 4HTML> 4HEAD> 4HEAD> 4META http-equiv=Content-Type content="text/html; charset=iso-8859-1"> 4META http-equiv=Content-Type content="text/html; charset=iso-8859-1"> 4META content="Microsoft FrontPage 4.0" name=GENERATOR> 4BODY bgColor=#fffffff 4DDV 4DDV 4DDV 4DDV 4DDV 4DDV 4DDV 4DDV</pre>	H
	<pre><div <="" <[div="" div="</PONT" face="Tahoma" size="6">MEMORANDUM </div> face=Arial size=2> <p> </p> <div align="justify"> <pont face="Tahoma">Date: </pont></div></pre>	> 11</font
	<div align="justify"> </div> To:<span< p="">class=343024014-11012012> &</span<>	bsp; & bsp; & _▼
	Attachments Brow	se Remove
	\\BRIGITTEDESKTOP\Desktop\HTML Email Report.doc	
	Run from Inner Popflow	K Cancel



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.

Enter HTML Email	×
From address: HTMLEmail@noetica.com	
To address: < <emailaddress>></emailaddress>	< <calculations>></calculations>
To < <customer>> (P) Please read the attached document. (P) Please read the attached document. (P) (HTAL> (HEAD> (META http-equiv=Content-Type content="text/html; charset=iso-8859-1"> (META content="Microsoft FrontPage 4.0" name=GENERATOR> (BOTy bgColor =#ffffff> (DIV > (DIV align=center><p>(FONT face=Tahoma size=6>MEMORANDUM (DIV align=justify>Date: <span< p=""> (dass=343024014+11012012> (DIV align=justify>CFONT> (DIV> (DIV align=justify>To: <span< p=""> (dass=343024014+11012012> (DIV align=justify>CFONT>&SPAN (dass=343024014+11012012> (DIV align=justify> (SPAN (dass=343024014+11012012> </span<></span<></p></customer>	NT> <font 11 &a &a mowse Remove</font
✓ Run from Inner Popflow	OK Cancel

- 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. <u>\\Machine\sharename</u> \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.

Enter HTML Email	
From address: HTMLEmail@noetica.com	
To address: << <emailaddress>> <<<calculations>></calculations></emailaddress>	
To < <customer>> Please read the attached document. (HTML> <head> <meta content="text/html; charset=utf-8" http-equiv="Content-Type"/> <meta content="text/html; charset=utf-8" http-equiv="Content-Type"/> <meta content="Microsoft FrontPage 4.0" name="GENERATOR"/></head> <body bgcolor="#ffffff"> <div></div> <div align="center">MEMORANDUM</div> <p>&http://FONT5 <div align="justfy">Date:<span <lass=343024014+11012012> </lass=343024014+11012012></span </div></p></font </body></customer>	Click the Browse button to locate file attachments
✓ Run from Inner Popflow OK Cancel	

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.

Campaign Manager		<u>- 🗆 ×</u>
<u>File View H</u> elp		
All Accounts	Report Properties	
AJN AJN Test Centre	······································	
	Report Name HTML Email ID 546	
BU9 Brighte09	Comment	
BIT Brighte Test2011	Full Name HTML Email	
02 Runner test	Costed Data 12/04/2011	
E 03 UMS MessageX	Created Date 12/04/2011	
- A Rotas OutofHours	Report Tool HTML Email Service - Format HTML -	
	Printer/Export File Name (e.g. %d%m%y for dated filenames)	
🕀 昌 06 CRM Test		
07 New DBTable test	Cutput Service	
🗈 昌 08 CRM Notes		
🗈 昌 09 CRM Notes2		
	Parameter1 test@noetica.com	
0B Edit SQI	Parameter2 brigitte.reimer@noetica.com	
0C Trans Table		
DD DB Service lest	Save Delete Edit Report	
OE DeleteCampaign OE Reducting EngenTel		
OH LiftRenair Survey		
0 I CRMTest March11		
🖃 🦣 7 0J CRMTest April		
HTML Email		
- Q Add Schedule		
- 👼 Report Runs		
Schedule No 722		
🗄 🔠 Test HTML Email		
BAP Brigitte Test 2010		
E BCA Arvato BCA		
BDD Brentford Dry Docks		
Bite Brighte Leiebusiness		
Ready		

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.

When would you Timed C Every 1 , minute(s) C Every 1 , day(s) C Every 1 , day(s) C In specific days of the week C Monthly	Event driven Event drite
---	---

- 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 31 st March 2011. Your co-operation is appreciated.		



EXPORT WIZARD

🛓 Dialog		×
First Select Destination Databas TRN Select Table	e for Synthesys	Export Select Destination Columns
)	Date CustID Title FirstName Surname Date of Birth Telephone Postcode Order Payment
E ₩ U_Debit	Catabase Ex Assign Values Note. Values Destination Date CustID Title	to Destination Columns Shown in Red no Longer Exist in the Callflow and Must be Replaced Source Call Date Customer-Customer ID
	FirstName Surname Telephone Postcode Order Payment Calculations	Call Value Calculation Sequence ID Call Date Customer-Customer ID
		< <u>B</u> ack <u>N</u> ext > Cancel



THE SYNTHESYS EXPORT WIZARD

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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.

🔮 Noetica Export Wizard	_		X
	Select Required Export		
	< <u>B</u> ack	<u>N</u> ext >	Cancel

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

Flat File Export Step 1 of 3 ✓ First Row Has Column Names?	X
<u>R</u> ow Delimiter : {CR}{LF} ▼ <u>C</u> olumn Delimiter : Comma(.) ▼ Field Qualifier : Double Quote(") ▼	Create New File C Once Only C Weekly C For Each Call C Monthly C Hourly C Yearly C Daily
-	< <u>Back Next > Cancel</u>

• 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.

💰 Flat File Export Step 2 of 3	×
Select Required Sections/Controls from the Synthesys Database	•
P Customer ID D Customer ID D Noetica Name Control. Title P Noetica Name Control. Surname P Noetica Name Control. Surname	
P Home Number P Work Number Noatics Address Control Line1	_
< <u>B</u> ack <u>N</u> ext >	Cancel

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.**

Flat File E	xport Step 3 of 3 SYNTHESYS Export Wizard	
	Select Destination File Location	If th or s the is d 'Se not
	< Back Next > Cancel	Exµ res

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.

Save Expo	SYNTHESYS Export Wizard	
	Select Location for the Export \\newblue\synthesys\Reports\BR AugSept\DynamicTeam	s]
	< Back F	inish Cancel

- 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.

🔀 Campaign Manager	
<u>File View H</u> elp	
💾 🗢 🚳 🛃 😗 🥐	
All Accounts a ad didsfds G DA Daroll DTS DemonstrationandTrainingScripts 0 DTS Demonstratio	Report Properties Report Name ID NONE Comment
Ready	

• 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.

🍯 Noetica Export Wizard		×
	Select Required Export C Database C Flat File C CATI	
	< <u>B</u> ack	<u>Next</u> ≻ Cancel

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**.

, Select Table		Select I	Destination Columns	
50	e lect Data Source File Data Source Machine Dai	ta Source		?
	Data Source Name MG Access Database OHMS owl Phoenix Phoneyx TestData	Type User System System User User User System	Description SQL Server DHMS link to phoenix on owl Synthesys Phoenix Database Synthesys Phoneyx Database Training	•
	A Machine Data Source is s "User" data sources are spe sources can be used by all u	pecific to thi cific to a us isers on this	N s machine, and cannot be shared. ar on this machine. "System" data machine, or by a system-wide serv	ew

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.

TRN	Select Destination I	Columna
CRM_FT_INF0 CRM_FT_INF0 CRM_FT_INF0 CRM_FT_INF0 CRM_FT_INF0 CRM_FT_INF0	Date Date Title Sumame Telephone Order Enquiry	CustD FirstName Date of Birth Postcode Payment

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.

Destination	Source
Date	Call Date
CustID	Customer-Customer-Customer ID
Litte	
FirstName	Call Value
Surname	Calculation
lelephone	Sequence ID
Postcode	Call Date
Jrder	Customer-Customer ID
Payment	
alculations	Fidt

• 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.

Date Call Date Customer-Customer-Customer ID Title Customer-Customer-Noetica Name Control. Title FirstName Sunname Date of Birth Telephone Postcode Order	Destination	Source
CustID Customer-Customer ID Title Customer-Customer ID Title Customer-Customer-Noetica Name Control. Title FirstName Date of Bith Telephone Postcode Order ——————————————————————————————————	Date	Call Date
Title Customer-Customer-Noetica Name Control. Title FirstName Image: Control Cont	CustID	Customer-Customer ID
FirstName FirstName Suname Date of Bith Telephone Postcode Order FirstName Forder FirstName FirstNam	Title	Customer-Customer-Noetica Name Control. Title
Suname Date of Bith Telephone Postcode Order	FirstName	
Date of Birth Telephone Postcode Order	Surname	
Telephone Postcode Order	Date of Birth	
Postcode Order	Telephone	
Order	Postcode	
	Order	
Payment	Payment	
Enquiru	Enquiru	i 🔟 .

- 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.

Date C CustID C Title C	all Date ustomer-Customer-Customer I	D		
CustID C Title C	ustomer-Customer-Customer I	D		
Title C				
	ustomer-Lustomer-Noetica N	ame Control. Title		
FirstName C	ustomer-Customer-Noetica Na	ame Control First	lame	
Date of Birth Telephone	ustomer-Lustomer-Noetica Na	me Control. Surna	mej	
Postcode				
Drder				
Payment				
Enquiru				

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.

Save Export	×
	Select Location for the Export \\Reddevil\Synthesys\Reports\BrighteOctOBName2.exp
	< Back Finish Cancel



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.

<mark>≿ Campaign Manager</mark> Eile ⊻iew <u>H</u> elp	
Eventpaceformation of the first sector of	Report Properties Report Name ID NONE Comment
Ready	Output Tool (none) Parameter1 Parameter2 Save Delete Edit Report

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.

Campaign Manager	
File View Help	
■ @ ∞ @ ₩ () ?	
AXT ActiveX Test AXT ActiveX Test Best MartinB Comparison of the set of	Report Properties Report Name Ties Are Us Export Report ID 345 Comment Full Name \MARTINIVE\SYNTHESYS\Reports\Ties are Us1.exp Created Date 16/05/2001 Browse Reports Report Tool Export Service Format Text Printer/Export File Name (e.g. 2d2m2y for dated filenames) Output Service Format Output Service Format Text Parameter1 Parameter2 Format
OF Check2 OB Branching BRI Briantite	Sequence ID (Instant Only)] Save Delete Edit Report

• 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.

Destination	Source		<u> </u>	
Date	Call Date			
CustID	Customer-Customer-Cust	omer ID		
Title	Customer-Customer-Noe	tica Name Control. Title		
FirstName	Customer-Customer-Nc	, Dialog		
Surname	Customer-Customer-Nc			
Date of Birth	Customer-Customer-No	First Calast Destination Database for Supties	us Euroat	
Telephone		First Select Destination Database for Synthesi	hs Exbou	
Postcode		TRN		
Order		Select Table	Select Destination C	olumns
Payment			- Date	🕅 CuelD
Enquiru				Section 2015
Calculations				Dista of Pirth
	1	CRMEnternal	X Juriane	
		diproperties	X relephone	
		Tios are Us	Urder	X Payment
		III Debit	Enquiry	



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.

ill Date istomer-Custi				
stomer-Custin				
	New Calculation		Y	
istomer-Custi	new conculation			
istomer-Custi	Nama ·			
istomer-Custi	Name .			
stomer-Custc	Calculation1			
istomer-Custi				
istomer-Custi	ΟΚ	Cancel	1	
		Cancer		-
	stomer-Custi stomer-Custi stomer-Custi stomer-Custi stomer-Custi	stomer-Custi stomer-Custi stomer-Custi stomer-Custi stomer-Custi Calculation1	stomer-Cust stomer-Cust stomer-Cust stomer-Cust stomer-Cust Calculation1 cancel	stomer-Cust stomer-Cust stomer-Cust stomer-Cust DK Cancel

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

New Calculation		×
Name :		
OrderDetails		
ОК	Cancel	

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** when 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.

Catabase Export Step 1 of 2	×
SYNTHE	SYS Wizard
First Select Destination Database for Synthesys Expo	ort Select Destination Columns
Phoenix_WSNotify SLS_Actors SLS_Contacts SLS_Rotas SLS_Theatres SQI_REQUESTS Synthesys_Reports_Sales Synthesys_Reports_Sales	⊠ Sequence_id ⊠ Sale_Value ⊠ Commission
	< <u>B</u> ack <u>N</u> ext > Cancel

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.

₿	SYNTHESYS Export Wizard
Assign Values t Note, Values SI	o Destination Columns nown in Red no Longer Exist in the Callflow and Must be Replaced
Destination	Source
Sequence_id	Sequence ID Order Edit) (alua
Commission	Name : Commission OK Cancel
Calculations	Edit
	< Back Next > Cancel

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

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

Calculation Definition (Commission)		
 CallFlow System Operators Functions 	Calculation Commission() Commission=''0.05'' End 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*.

🖄 Campaign Manager	_ 🗆 🗙
<u>Eile Yi</u> ew <u>H</u> elp	
All Accounts aaa dfdsfds DAR Darroll DTS DemonstrationandTrainingScripts 01 Loanapplication 02 SwiftLifts 03 Marketing 04 Schedule 04 Schedule 05 Email Handing 05 Email Handing 05 Demonstrations Califlows WAL Water Report Tools Parameter1 Parameter2 Save Delete Edit Report	
Reauy	1.

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.

abiaat wadau l		
P001	New Calculation	<u> </u>
P003 P004		
P006	Name :	
P008	ObjectIndex	
P010		
PUII P012	OK Cancel	
P013		
P01/		

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.

Destination	Source		
object_index	ObjectIndex		
P001	Customer-Customer ID		
P003	Customer-Customer-Noetica Name Control. Title		
P004	Customer-Customer-Noetica Name Control FirstName		
P006	Customer-Customer-Noetica Name Control.Surname		
P008	Customer-Customer-Home Number		
P010	Customer-Customer-Noetica Address Control.PostCode		
P011	v		
P012	Call Value		
P013	Calculation		
P01/	Sequence ID		
Calculations	Customer-Customer ID		
Saloaladonio	Customer-Customer-Home Number		



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 dataSolution: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: Solution:	Report contains too much data Incorrect filer, instant Reports must include the Sequence_ID from Phoenix Report table
Problem: Solution:	'One copy of Synthesys is already running' Use Control-Alt-Delete to Terminate 'Workstation'
Problem: Solution:	'Invalid Session' message box, ResetSession The System did not finish your last session properly, run ResetSession to end your previous session.
Problem: Solution:	'Unable to open Synthesys.inf' error The network is probably not working
Problem: Solution:	Placeholders don't appear in templates. 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: Solution:	'This will result in a 'Cross-Product report' 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





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 reports 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.

ڬ Campaign Manager		- 🗆 ×
<u>Eile View H</u> elp		
💾 🗠 🚳 🗮 🕓 🕐		
All Accounts ALL Allianz BEX Brighte Example BTR Brighte Training OI City Breaks Add Schedule SQI Add Schedule No 2 Add Schedule No 2 O2 Sales Survey O2 Sales Survey O2 Sales Survey O3 Express Loan O2 Sales Survey O3 Express Loan O4 GET emmanuel O5 go eatest O5 go eatest O15 pointstationandTrainingScrip MCM MONDIAL OB MCM MONDIAL OB O2 OBTest2 OB2 OBTest2	Report Properties Report Name ID NONE Comment Any relevant comments Full Name Full name or report path (\\OperationsServer\Syntheys\Reports\testReport.rpt) Created Date 14/09/2009 Browse Reports Report Tool Crystal Service Printer/Export File Name (e.g. %2%m%y for dated filenames) \\OperationsServer\Syntheys\Reports\testReport.txt Output Service Output Tool Parameter1 From Address Parameter2 To Address Save Delete	
Ready		1.

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*.

Edit Call Flow
Unlock Call Flow
Create New Export
Show Schedules
Show Report Runs
Remove Intermediate Versions
Assign telephone number for this campaign
Report Wizard
Add New Report

- 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.

Assigned numbers for this campaign	×
123456789	Close
Type a new telephone number and click Ad	<u>H</u> emove

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.

PhRepMg	r .		×
The number '1212' is in use by account 'BrigitteJune05' (campaign 'Ties are Us'). Click YES to reassign it campaign, NO to have the number assigned to both campaigns.			mpaign 'Ties are Us'). Click YES to reassign it to this aigns.
	<u>Y</u> es	No	Cancel

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.

PhRepMg	jr
?	This will Permanantly Remove Intermediate Versions of the Callflow from the Server Do you wish to Proceed?
	Yes <u>N</u> o

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.

🗠 Campaign Manager		
File View Help		
File View Help Image: A lance of the second secon	Account Details Account Name Demonstrationand TrainingScripts Prefix DTS Address: Suite 45-47 The frog Exchange, Street London: Street London:	
Lo Panadon Lo Panadon Lo Pontanne Request Lo Pontanne Request	Pontode: SET ITY Account Manager: Admin Man Contact: Bigide Feiner Telephone: (0044 845 0151070 Other Contact: Telephone: Fax: (044 20 7403 4153 E mail: office@model.a.com Web Site: www.motelca.com Invoice.ID: Save: Delete	
Ready		

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.

PhRepMgr						×
There are 3 0	ampaigi	ns for this	Account	, please (delete the	em first.
		(OK)	l		

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

Are You Sure ?	×
Are you sure you want to delete this Account ?	
Cancel	
Tick box to delete reports folder for this Account (Folder: \\Quail\Synthesys\reports\XYZ)	

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:

Warning! You are about to delete a Campaign!
This will permanently delete data from the Design and/or Live databases. There are 37 Calls for this Campaign Please select what you want to delete
Delete 'Call' Data from before 10/09/2009
O Delete all 'Call' Data from Live Database
C Delete 'Call' Data and Custom tables from Design Database and Live Databases, but keep Campaign information and Script.
O Delete Campaign Entirely, from Design Database and Live Database
Delete

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.

PhRepMgr	\times
There are Active Sequences for this campaign, please clear them first	

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.

PhRepMgr X
This Campaign has an Outbound Campaign, please use the Outbound Manager to delete it first!
OK



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 Accountprefix 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.
- All CallFlow data is deleted from tables prefixed with the three-letter Accountprefix and two-digit Campaign-prefix, e.g. ABC01_Main (Phoenix database).
 N.B. data in 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 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.
- All CallFlow tables are deleted those prefixed with the three-letter Accountprefix 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 Accountprefix 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





Synthesys 'Personnel' Data Model 2.5





Synthesys 'Reports' Data Model 2.5











Synthesys 'Example Campaign' Data Model 2.5









Synthesys 'Teams' Data Model 2.5





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