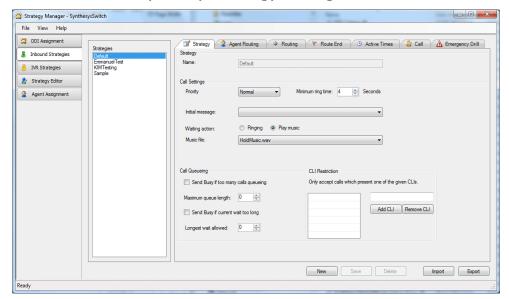
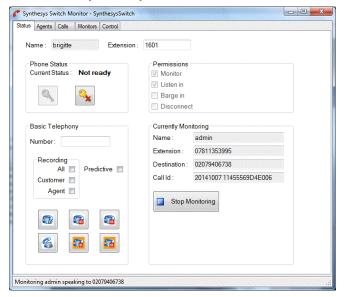


NOETICA VOICE PLATFORM

Synthesys Strategy Manager



Synthesys Switch Monitor







NOETICA VOICE PLATFORM

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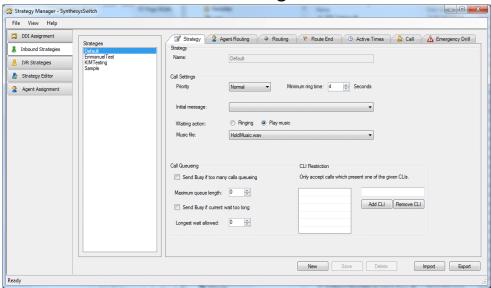


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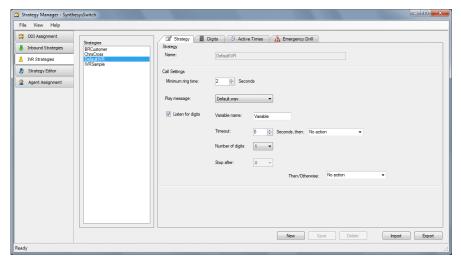


Strategy Manager – Synthesys Switch

Inbound Strategies



IVR Strategies





6

THE STRATEGY MANAGER - SYNTHESYS SWITCH

INTRODUCTION

Open the **Strategy Manager** via the **Manage** tab of the Synthesys workstation, and select the Switch that you wish to connect to from the drop down menu.

In the **DDI Assignment** dialog, users associate each incoming DDI with an Inbound or IVR strategy.

Inbound Strategies are used to define call settings and the queuing process. Users can set a minimum ring time before calls are answered, decide if a regulatory message or music should be played while callers are waiting and if the call should be recorded. For each strategy defined, users can then specify further details under the **Agent Routing, Routing, Route End, Active Times, Call** and **Emergency Drill** tabs.

IVR Strategies (Interactive voice response) allow you to define strategies for customer interaction using message requests and DTMF tones input via the telephone keypad to route the call to the appropriate agent.

As part of the IVR strategy users can define *Variables*, and associate single digit entries with specific Inbound or IVR strategies (1 for Customer service, 2 for Sales), which subsequently can be used in Callflow calculations and branching, and for reporting.

The **Strategy Editor** can hold, if requested, more complex bespoke strategies designed in XML, to add extra functionality. Please contact your Noetica Account Manager for more information.

In the **Agent Assignment** dialog, users can assign an incoming DDI to a selected Agent.



All system messages are held in WAV files and can be customised per campaign. If you need guidance to creating WAV files, please get in touch with Noetica and we can provide further information. (Document Reference NDID-33-72: 'Recording Sound Files for the Synthesys Voice Platform'). Save the recording on

\\switchserver\synthesysswitch\WavFiles. You can either overwrite the current file or save a copy and replace it later.

All call details (successful or abandoned) are logged to a database for reporting on call centre performance.

Variables set up as part of IVR strategies can be used in Callflow calculations and branching to determine the flow of the conversation, and in reporting.

The Noetica Voice Platform is not a standard feature but needs to be purchased separately.

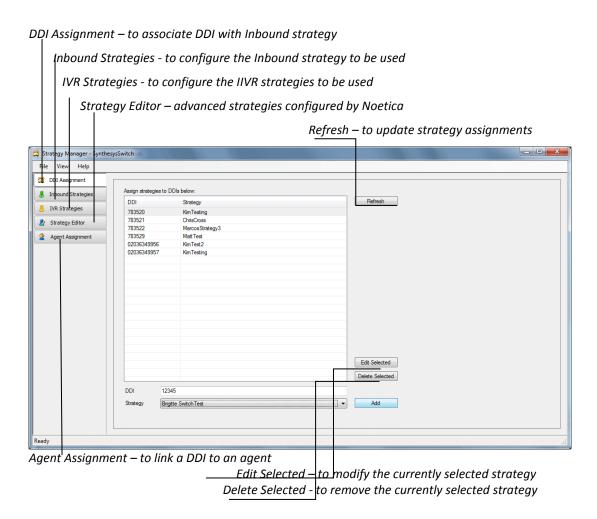


DDI ASSIGNMENT

Using the *Strategy Manager*, users can configure the Inbound and IVR strategies that are to be associated with each incoming DDI (Direct Dial In number).

IVR and Inbound strategies are assigned to DDI numbers in the DDI Assignment dialog.

- Enter the DDI number into the **DDI** field at the bottom of the dialog.
- Select the desired strategy from the **Strategy** drop down menu.
- Click the **Add** button now enabled, to display the DDI and associated strategy in the **DDI** and **Strategy** columns of the *Assign strategies to DDI below* section.
- To update information, click the Refresh button on the right of DDI and Strategy columns.



The next pages will describe how you can configure new Inbound and IVR strategies. To assign a DDI to a selected agent, please go to the section **Agent Assignment** for more information.



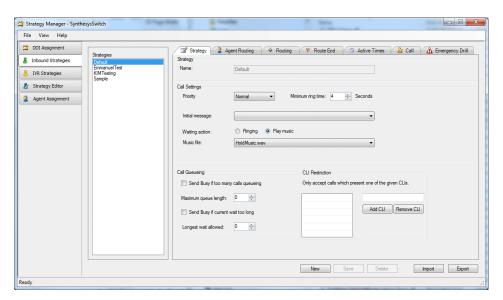
8

INBOUND STRATEGIES

Strategy

To configure the Inbound Strategy, specifying the **Call Settings** to be applied for each call. The *Import* and *Export* buttons are used to import or export Inbound strategies as xml files.

- Create a new Inbound strategy clicking the New button at the bottom of the Strategy screen, and then type a name for the strategy into the Name field.
- Select a **Priority** of Low, Normal, High or Urgent to determine which calls from the available strategies should be presented to available agents first.
- Select, in seconds the *Minimum ring time* before the call is answered.
- Select an Initial **message** (WAV file), if one is to be played before a caller joins the queue (e.g. 'Your call may be recorded for training purpose').
- Specify the Waiting action, i.e. tick Ringing if the caller should hear a ringing tone while queuing/ waiting, or select a Music file (WAV file), to play music.



Configuring details for the Call Queuing process

- Tick Send Busy if too many calls queuing and for Maximum queue length, enter
 the maximum number of callers allowed in the queue. If the limit set is
 exceeded, any new caller will hear a busy signal.
- Tick Send Busy if current wait too long and enter, in seconds, the Longest wait allowed, to send a busy signal to any new caller, if the waiting time for any caller in the queue exceeds the limit set.

CLI Restriction

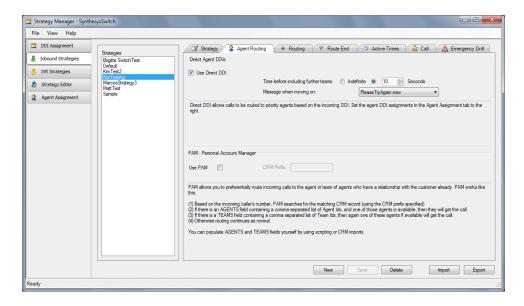
- Enter one or multiple CLIs to activate the CLI restriction feature, specifying that ONLY calls from the listed CLI number(s) will be accepted.
- If the ACD rejects a call because it does not match any of the CLIs entered, it will send a busy back.



Agent Routing

Direct Agent DDIs

- Tick the Use Direct DDI option, if the DDI is initially to be routed to a selected agent or agents, as assigned in the Agent Assignment page of the Strategy Manager.
- Users can specify, in seconds, the Time waiting, before the call can overflow to
 other teams in the routing tab. If Indefinite is selected, the call will only pop to
 agents assigned to the DDI.



PAM - Personal Account Manager

PAM routing allows for customers to be routed to preferred agents or teams, depending on successful CLI recognition. To enable PAM routing you initially need to use call scripting to add an AGENTS and/or TEAMS field to the relevant CRM, and then use CRM imports, to populate these fields with a comma separated list of Agent Ids and Team Ids.

In the Synthesys Inbound Strategies page, under the Agent Routing tab

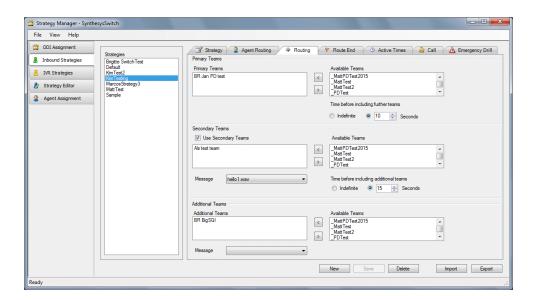
- Tick the Use PAM option and enter the relevant CRM Prefix.
- Based on the incoming caller's number, PAM will search for the matching customer record, using the CRM prefix specified.
- If there is an AGENTS field containing Agent IDs, and one of the agents is available, the call will be passed to that agent. If there is a TEAMS field containing a list of Team IDs, the call will be passed to one of the available agents in that team. If no Teams or Agents options are available routing continues as normal.



Routing

Under the Routing option, users can assign teams and specify how to deal with a call, if it hasn't been answered within a given time:

- Use the Primary Teams/ Available Teams option to assign a list of Primary Teams to each strategy.
- If the call isn't answered in a configurable time (Time before including further teams), the call can be routed to Secondary Teams, if they have been specified.
- A Message (WAV file) can be played while the caller is waiting in the queue.
- If the call isn't answered in a configurable time (**Time before including additional teams**), the call can be routed to further **Teams**, if they have been specified.
- A **Message** (WAV file) can be played while the caller is waiting in the queue.





The number of inbound calls that can be queued is only limited by the number of lines configured on the system.

If multiple teams have been set up, all teams will be searched to locate an available agent.

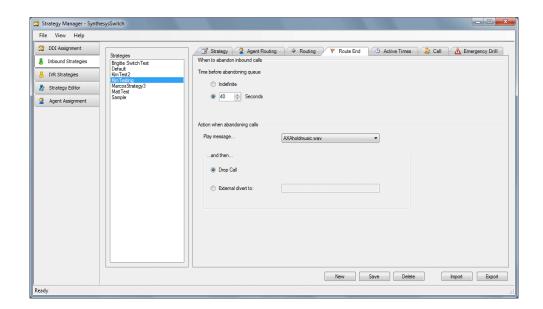
The longest waiting call is answered first, and is given to the longest waiting agent who is in the correct teams and not on wrap.



Route End

Under the Route End tab you can decide details for abandoning or diverting inbound calls.

- Users can specify, in seconds, the Time before abandoning queue.
- In the **Play Message** field you can select a message (WAV file), if one is to be played before the call is either dropped or diverted.
- To drop the call, sending a busy tone, select **Drop Call**.
- To redirect a call to an external number, select **External divert to** and enter the telephone number (with full DDI) for the external transfer.

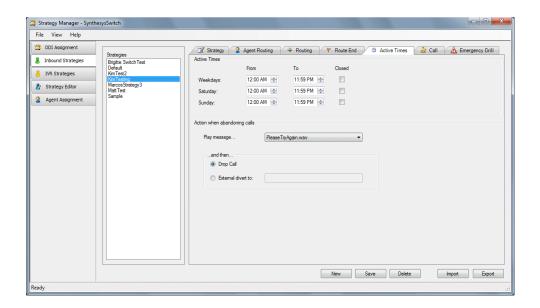




Active Times

Under **Active Times**, users can specify the opening hours during which the Inbound strategy will be used and select an Out of hours message. When abandoning calls, you can specify an required action, i.e. to play a message, and then either drop or divert the call.

- Specify the opening hours for Weekdays, Saturday and Sunday, as required, or if the office is closed all day, place a tick into the 'Closed' box.
- In the **Play message** field you can select the message (WAV file) to be played when the offices are closed. If no message is selected callers will hear a busy tone.
- To drop the call, sending a busy back, select Drop Call.
- To redirect a call to an external number, select **External divert to** and enter the telephone number (with full DDI) for the external transfer.

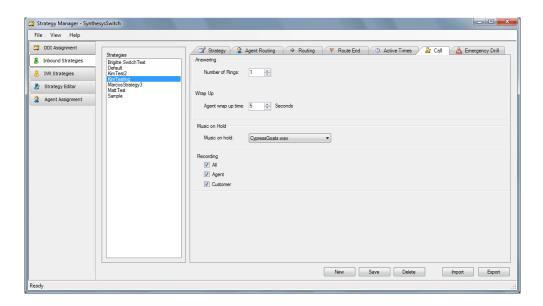




Call

Use the **Call** tab to specify the number of rings that will sound after the call has been passed to the agent, to notify the agent of an incoming call. You can also decide to play music while the caller is waiting in the queue.

- In the Answering section, enter or select the Number of Rings before the call is answered.
- In the Wrap Up section enter or select, in seconds, the Agent wrap-up time to be used.
- In the *Music on Hold* section users can select a Wav file to be played, when the caller is put on hold by the agent, after the call has been transferred.



Recording Options

Under **Recording**, you can either tick all options, or select any option(s) as required.

- Tick **All,** if you wish to record the conversation of both the agent and the customer.
- Tick **Agent** if you wish to create a recording file for the conversation of the agent.
- Tick **Customer** if you wish to create a recording file for the conversation of the customer.

Information related to call recordings is stored in the Phoenix_Switch_Recording table.

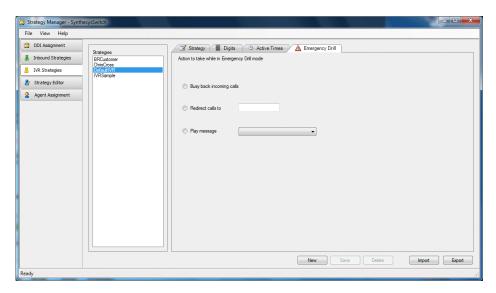
Information related to the Voice Recording Pause/ Resume Actions (Synthesys.Net), or Pause Recording control (Synthesys Classic and MiCC Outbound), used to stop and re-start recording at strategic points within the call, is stored in the Phoenix Switch Interface Event table.



Emergency Drill

Using the **Emergency Drill** page, users can specify the action to be taken, on a per strategy basis, should the Contact Centre have to be evacuated due to a fire drill or other cause. The specified action is then activated when the voice platform is put into emergency mode via the designated website.

Specifying the Action to be taken in an Emergency



Emergency Actions	Description
Busy back incoming calls	Send a busy signal to any new incoming calls, and any calls currently in the ACD queue.
Redirect calls to	Re-direct any new incoming calls, and any calls currently in the ACD queue to another number, which can be set on a perstrategy basis.
Play message	Play an automated message to any new incoming calls, and any calls currently in the ACD queue, e.g. 'I'm sorry but due to an emergency none of our agents are available at the moment', before they are disconnected.
	For calls currently in progress, the agents are best placed to inform their customer of the situation, before disconnecting the call, depending on the emergency.

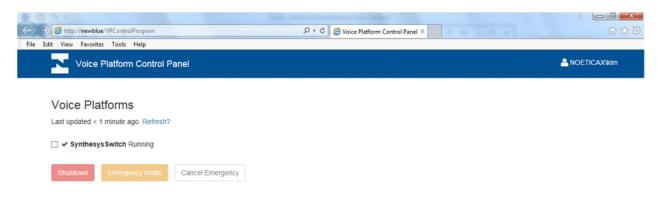


To put the switch into emergency mode in the event of an emergency, the staff members responsible must visit the designated Voice Platform website, either from within or from outside the building, to notify the switch of the action to be taken.



Putting the Switch into Emergency Mode

When an emergency arises, log into the designated Voice Platform website, to notify the switch of the action to be taken.



- Select the **Switch** that is to be put into Emergency mode.
- Select **Emergency Mode**, to activate the emergency procedures as specified in the *Emergency Drill* dialog of the Inbound Strategy.
- Select Shutdown to send a busy signal to any new incoming calls, and any calls currently in the ACD queue, regardless of the strategy and to prepare the switch for shutdown.
- For calls currently in progress, the agents are best placed to inform their customer of the situation, before disconnecting the call, depending on the emergency.

Action on Returning to building

On returning to the building, go to the website again and

- If the **Emergency Mode** option was selected to deal with the emergency, select **Cancel Emergency**, to resume activity as normal.
- If Shutdown was selected to deal with the emergency, contact your IT department and ask them to bring the Voice Platform back on line.

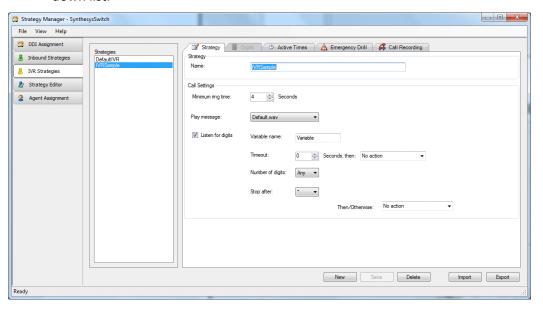


IVR STRATEGIES

Strategy

To configure IVR Strategies to deal with response requests that require callers to enter digits on the telephone keypad

- Type a name for the new Strategy into the Name field.
- Enter or select, in seconds, the *Minimum ring time* before the call is answered.
- Select the message (Wav file), if one is to be played, from the Play message drop down list.



Tick **Listen for digits** if you wish to specify Variable settings:

- Enter a name for your variable into the **Variable names** field.
- In the **Timeout** field, enter the number of seconds the system will wait for a response, after which the selected **Timeout Action** is activated.
- If the digits to be entered on the telephone keypad are of a fixed length, specify
 the Number of digits. If there is no match, the selected Timeout Action will be
 activated. If the digits required are entered or if no timeout action has been
 selected, then the action selected in the Then/ Otherwise field will be activated.
- If the digits to be entered are of variable length, specify a **Stop after** point, i.e. a # tag, after which the selected **Inbound or IVR strategy** will be activated.

To associate single digit entries with specific Inbound or IVR strategies, enter **1** into the *Number of digits* field. Please see the next page for a list of available actions and **Digits** information.



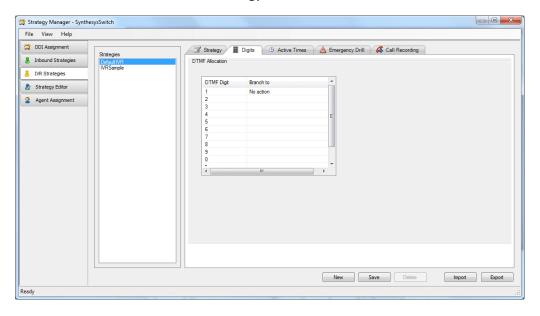
Digits

The *Digits* tab is enabled if the response requested from a caller requires a single digit entry on the telephone keypad and if a **1** has been entered into the *Number of digit* field in the IVR Strategy page.

Each DTMF digit can be associated with a specific Inbound or IVR strategy. This way callers can be routed to the next logical IVR or Inbound strategy, or action, depending on the option requested when pressing a digit on the telephone keypad, for example, 1 for Customer Service; 2 for Sales.

To associate the **DTMF Digit** with an action in the **Branch to** column

- Click into the **Branch to** column, and from the drop down menu subsequently displayed, select the required action.
- If no action is selected for the DTMF digit, then the action selected in the Then/
 Otherwise field under the Strategy tab will be activated.



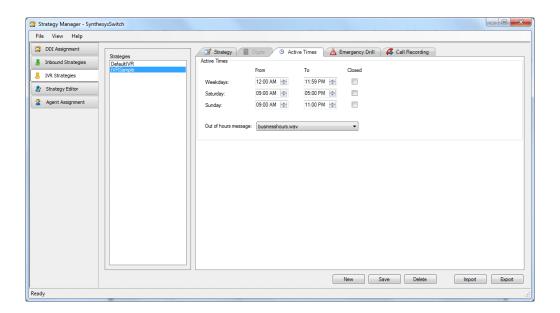
Action	Used to
Inbound Strategy	Start the selected Inbound strategy
IVR Strategy	Start the selected IVR strategy
Repeat Recording	Play the previously played recording again
Hang Up	Hang up the call
No Action	Hang up the call



Active Times

Under **Active Times**, users can select the opening hours during which the IVR strategy will be used and select an Out of hours message.

- Specify the opening hours for Weekdays, Saturday and Sunday, as required, or if the office is closed all day, place a tick into the 'Closed' box.
- Select the message to be played when the offices are closed. If no message is selected callers will hear a busy tone.

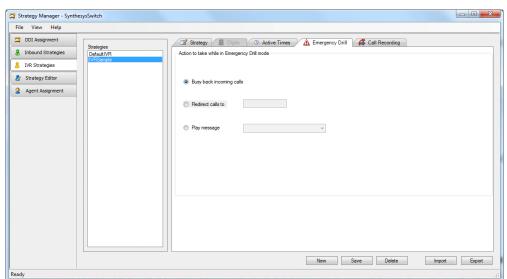




Emergency Drill

Using the **Emergency Drill** page, users can specify the action to be taken, on a per IVR strategy basis, should the Contact Centre have to be evacuated due to a fire drill or other cause. The specified action is then activated when the voice platform is put into emergency mode via the designated website.

Specifying the Action to be taken in an Emergency



Emergency Actions Description **Busy back incoming calls** Send a busy signal to any new incoming calls, and any calls currently in the ACD queue. Redirect calls to Re-direct any new incoming calls, and any calls currently in the ACD queue to another number, which can be set on a perstrategy basis. Play message Play an automated message to any new incoming calls, and any calls currently in the ACD queue, e.g. 'I'm sorry but due to an emergency none of our agents are available at the moment', before they are disconnected. For calls currently in progress, the agents are best placed to inform their customer of the situation, before disconnecting the call, depending on the emergency.

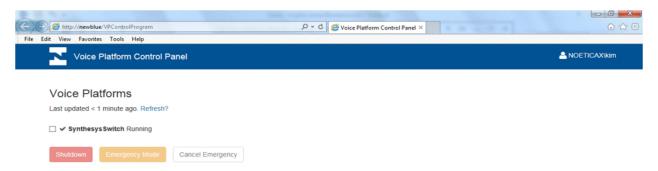


To put the switch into emergency mode in the event of an emergency, the staff members responsible must visit the designated Voice Platform website, either from within or from outside the building, to notify the switch of the action to be taken.



Putting the Switch into Emergency Mode

When an emergency arises, log into a designated Voice Platform website, to notify the switch of the action to be taken.



- Select the Switch that is to be put into Emergency mode.
- Select **Emergency Mode**, to activate the emergency procedures as specified in the *Emergency Drill* dialog of the IVR Strategy.
- Select **Shutdown** to send a busy signal to any new incoming calls, and any calls currently in the ACD queue, regardless of the strategy and to prepare the switch for shutdown.
- For calls currently in progress, the agents are best placed to inform their customer of the situation, before disconnecting the call, depending on the emergency.

Action on Returning to building

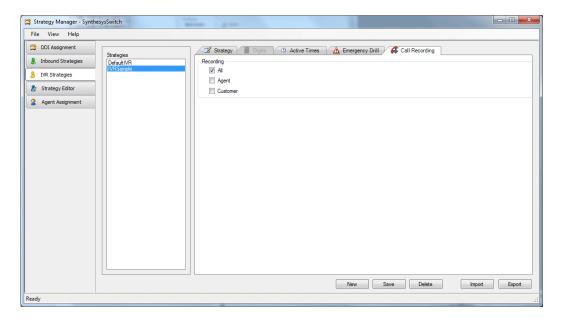
On returning to the building, go to the website again and

- If the **Emergency Mode** option was selected to deal with the emergency, select **Cancel Emergency**, to resume activity as normal.
- If Shutdown was selected to deal with the emergency, contact your IT department and ask them to bring the Voice Platform back on line.



Call Recording

In the Call Recording page of your IVR Stategy you can specify the type of recording file that you wish to create.



Recording Options

Under Call **Recording**, you can either tick all options, or select any option(s) as required.

- Tick All, if you wish to record the conversation of both the agent and the customer.
- Tick **Agent** if you wish to create a recording file for the conversation of the agent.
- Tick **Customer** if you wish to create a recording file for the conversation of the customer.

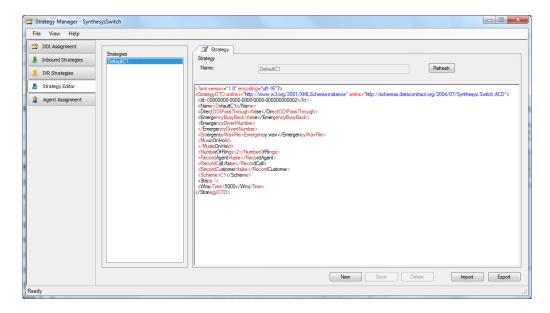
Information related to call recordings is stored in the Phoenix_Switch_Recording table.

Information related to the Voice Recording Pause/ Resume Actions (Synthesys.Net), or Pause Recording control (Synthesys Classic and MiCC Outbound), used to stop and re-start recording at strategic points within the call, is stored in the Phoenix_Switch_Interface_Event table.



THE STRATEGY EDITOR

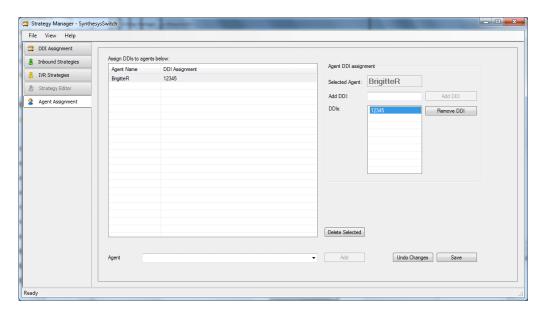
The Strategy Editor can hold, if requested, more complex bespoke strategies designed in XML, to add extra functionality. Please contact your Noetica Account Manager for more information.





AGENT ASSIGNMENT

The **Agent Assignment** tab allows users to route a DDI and associated call to a specific agent or agents, so that they can deal with a particular task.





Before assigning a DDI to a selected agent, ensure that the DDI number is already assigned to an Inbound Strategy in the **DDI Assignment** page. Also ensure that the **Use Direct DDI** option is ticked in the Direct Agent DDIs section under the **Agent Routing** tab of the **Inbound Strategies** page.

Assigning a DDI to a selected Agent

- Select the name of the agent to be assigned to the DDI number from the **Agent** drop down menu.
- Click the **Add** button, to add the agent name into the **Agent Name** column.
- Next, add the DDI, as entered in the DDI Assignment page, into the Add DDI field.
- Click the Add DDI button to add the DDI to the DDIs and DDI Assignment columns.
- Click the **Save** button and save your settings. Click *Undo changes* if you do not wish to save the changes you've made since the last save.".
- To Remove a DDI, select the DDI number in the **DDIs** column and click the Remove DDI button.
- To delete a saved agent assignment, select the assignment and click **Delete Selected.**



NOETICA VOICE PLATFORM & OUTBOUND CALLING

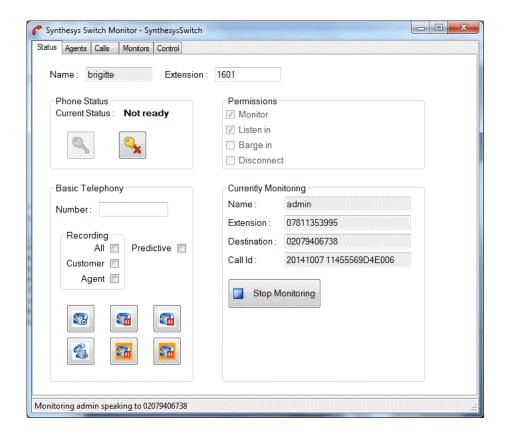
If you are using the Noetica Voice Platform for outbound calling, you can set the following associated properties in the *Outbound Manager Advanced options* screen.

Available Synthesys Switch Outbound List Properties

Answer machine detection	True/ False. Turns on/ off Answer Machine Detection, providing the switch supports AMD.
AnswerMachineFaxTimeout	Number of seconds the dialler allows to classify fax machines once the answer machine detection algorithm decides the recipient is not human.
AnswerMachineTimeout	Number of seconds the answer machine detection algorithm allows before transferring the call to the agent.
Cli to present	The telephone number that will be shown on the customer phone when receiving the call.
CLIToPresentOnTransfer	Enter "CustomerNumber" as a string, to display the customer number the Switch has called.
ListCleaningLinesToUse	Set the number of calls to be made concurrently by the dialler on a list cleaning campaign (ensuring the number is lower than the actual lines in use, depending on the lines\trunks available).
ListCleaningSwitchToUse	Enter the switch name, if List Cleaning is used in a multi switch environment.
No answer timeout	Set the number of seconds the Switch allows the call to ring, before dropping it as no answer.
Nuisance wav file	Wav file with message to be played if the PD generates a nuisance call
TransferToIVROnAMD	Enter the DDI number as used in the Strategy Manager, to transfer calls on detecting an Answer Machine to the associated IVR strategy (Noetica Voice Platform - Synthesys Switch, using DTMF step)
TransferToStrategy	Enter the DDI number as used in the Strategy Manager, to transfer a call classified as a nuisance call to the associated IVR strategy.
Recording	True/ False. Set Recording to True, to record the conversation of both the agent and the customer.
RecordingAgent	True/ False. Set RecordingAgent to True, to create a recording file for the conversation of the agent.
RecordingCustomer	True/ False. Set RecordingCustomer to True, to create a recording file for the conversation of the customer.
MusicOnHold	The name of the WAV file to be used, i.e. CypressGoats.wav. to play music when the caller is put on hold. The WAV file selected has to be stored in the Synthesys Voice Platform WAV folder.



Synthesys Switch Monitor





SYNTHESYS SWITCH MONITOR

INTRODUCTION

The *Synthesys Switch Monitor* enables supervisors to view and monitor calls made using the Noetica Voice Platform.

Supervisors can select the type of call that they wish to monitor, for example all predictive calls, or all calls with a specific extension.

The supervisor will then hear a selection of calls, from the moment the call is placed, through to the delivery of the call to an agent, to the call being finished or until the supervisor chooses to stop monitoring the call.

The Synthesys Switch Monitor is not a standard feature but needs to be purchased separately.



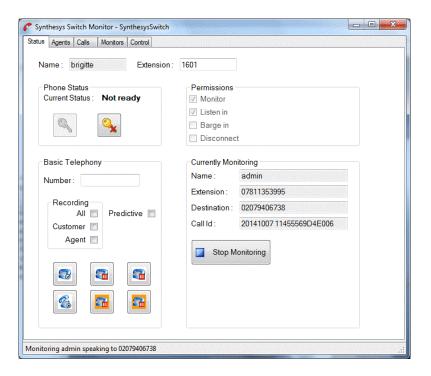
THE STATUS SCREEN

To start the Synthesys Switch Monitor:

 Click on Synthesys Switch Monitor under the Monitor heading of the Synthesys main screen.

The *Name* and *Extension* are taken from the details entered when logging into Synthesys, and should include a valid extension.

In our example, we are logging in with username 'brigitte', using extension '1601'.



The **Status Bar** shown above saying *initialised* also displays *current call progress* information and other messages.

Please see next page for more information.



Status Screen Options

The sections available in the Synthesys Monitor Status screen include:

Phone State

Logging in the phone

Clicking the key icon connects the *Noetica Voice Platform* to the supervisor phone, when the call is connected then status will turn to *Ready*.

Logging out

Click the key icon with a red cross to disconnect and logout from the Noetica Voice Platform.

Closing the *Synthesys Switch Monitor* will not disconnect the phone, since the phone can still be in use at the same time by the *Synthesys Agent* module.

Permissions

To access the advanced monitoring screens, you need to have the Synthesys *Run Live Monitor* permission, which can be set up in Personnel module.

The permissions ticked show the permissions that are available on your phone system.

Basic Telephony

This allows the CTI engineers to test extensions after an upgrade or the installation of new phone software.

Number: For entering the extension number to be dialled.

Recording: Tick to determine the type of recording file to be created. **Predictive:** Tick to call predictively, do not tick to test Preview calling.



The call can be recorded, but is not tagged within Synthesys Call History and so needs to be located manually on disk.

Telephone control should normally be done using the Synthesys Agents module.

Currently Monitoring

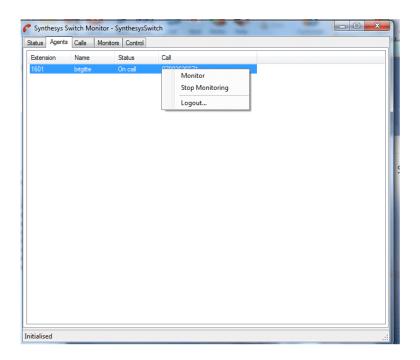
When monitoring a call, details of the monitored call appear here.



THE AGENT SCREEN

This shows all the currently logged on agents.

- Right click on an agent and select the Monitor option to add the agent to the
 items being monitored. If the agent is currently on a call, the current call is
 immediately monitored, otherwise the next call (and all subsequent calls) are
 monitored.
- To stop monitoring an agent, choose the Stop Monitoring menu option, or use the Monitors tab.
- To log an agent off, select the Logout option.



THE CALL SCREEN

The Calls Screen is similar to the Agents screen, but **showing all currently active calls** (including calls not currently assigned to an agent).

Again, the call can be monitored from this screen by using the right-click menu option.



THE MONITORS SCREEN

For more advanced call monitoring, the Monitors screen can be used.

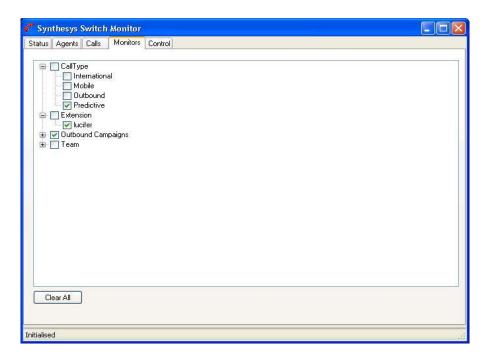
The Monitors screen shows a tree of all items that can be monitored. For example below, we have requested to monitor:

All predictive calls

All agents with extension 'Lucifer', and

All Outbound lists.

Items can be selected or deselected here by pressing the checkbox.



Clear All

The *Clear All* button provides a rapid way of clearing all the monitored items in the tree.

This will not necessarily stop monitoring the current call, (unless it was associated with a request to monitor an agent); this must be done from the 'Status' screen.



Call Monitoring

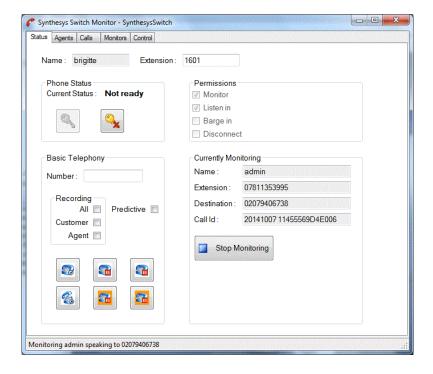
Providing that the supervisor who has requested this type of call to be monitored is available and not on, or monitoring another call, he or she can monitor a new call from start to its conclusion, or until the supervisor chooses to stop monitoring the call from the 'Status' tab.

Selecting *Predictive,* for example, the supervisor will hear a selection of predictive calls, from the moment the call is placed, through to the delivery of the call to an agent, to the call being finished.

Call Monitoring Details

Back in the first screen **Status**, we can view details of the currently monitored call.

In our example, the agent *Admin* logged on to extension 07811353995 has called the number '02079406738'. The status bar also provides current call information.



The supervisor can stop monitoring this call by pressing the *Stop Monitoring* button.

The supervisor will then be ready to monitor the next call. To stop monitoring this agent or other classes of calls, the relevant option is deselected in the 'Agents' or 'Monitors' tab.



NOTES