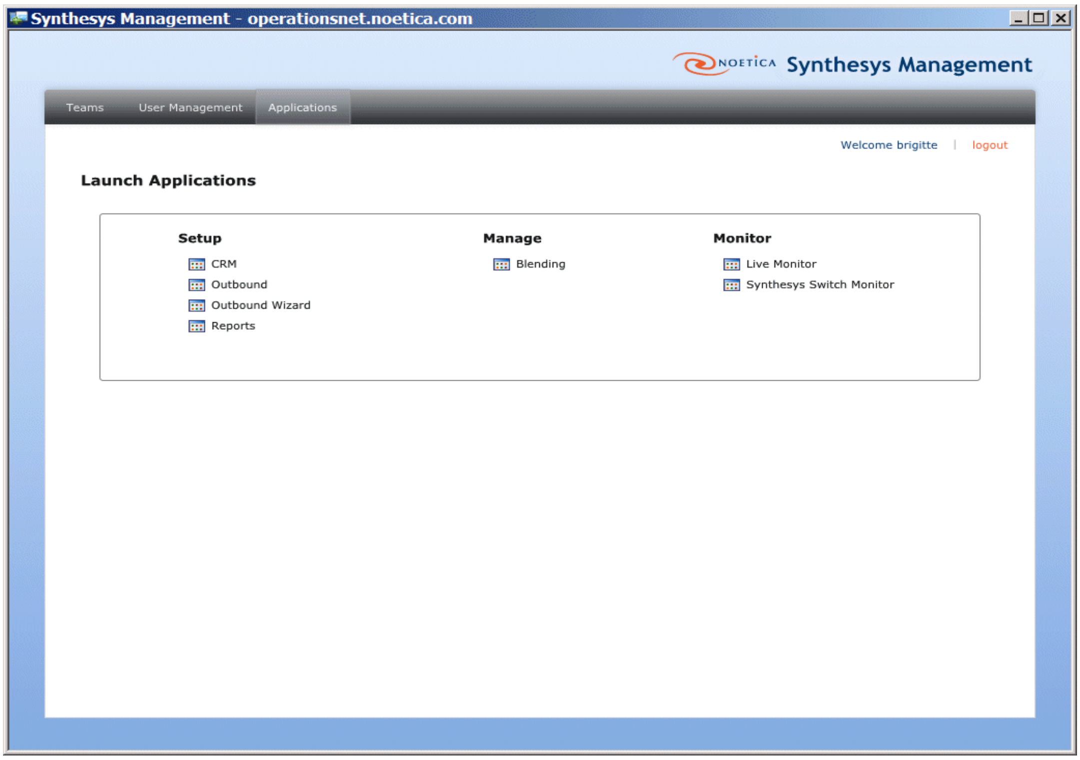
SYNTHESYS.NET

CRM and OUTBOUND



Synthesys.Net CRM and Outbound

Software Release Version 5.1

Document Version: 1.5

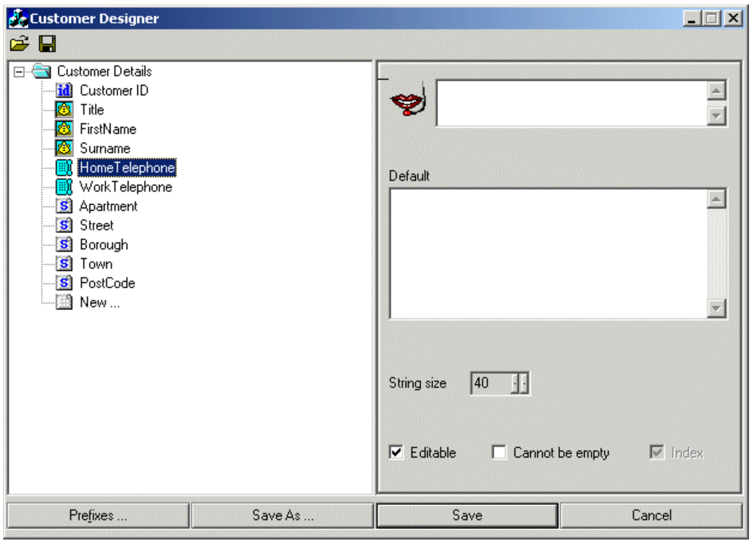
Last updated September 2016

Notes prepared by Brigitte Reimer

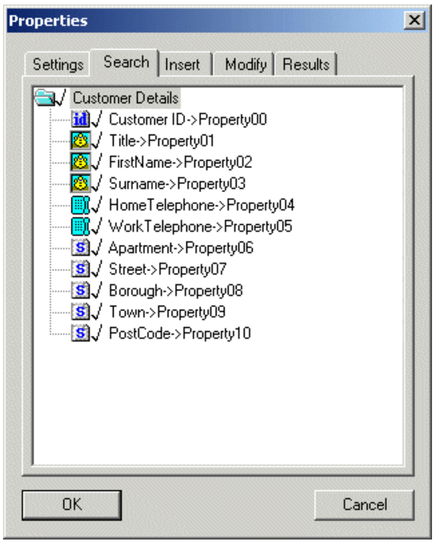
SYNTHESYS APPLICATIONS

CUSTOMER RELATIONSHIP MANAGEMENT

CRM Maintenance Table



CRM Properties Table



CRM

The **CRM** (Customer Relationship Management) option is used for creating new CRM accounts and campaigns and for adding, editing and managing CRM tables and customer records.

The CRM module allows access to customer profiles and histories and enables outbound calling.

When a CRM table has been created either in the ***CRM*** editor or in the **Outbound Wizard**, associated *Outbound lists* are then added in the **Output Wizard** or **Outbound** module of Synthesys 5.

Customers to be phoned are queued and placed into the required Outbound lists in the *Outbound* module. It is also in the Outbound module that customer call lists are maintained and managed.

Under ***Teams*** in the **Synthesys 5 Management** application, agents can be assigned to particular Outbound lists, reflecting the skill level and expertise of the agents and to control the distribution of workload throughout the call centre.

Using CRM Details in a Synthesys Webflow

CRM details are typically used in conjunction with Synthesys webflows that are designed in the Synthesys Interaction Studio.

To use all or selected CRM details as part of a webflow created in the Synthesys Interaction Studio, for example to enable branching or calculations on selected CRM information or to display details in the Dashboard, you must create the corresponding ***Parameters*** *in the Webflow Properties as part of the webflow design process.*

Please use the ***Synthesys 5*** *manual for information about creating CRM parameters in the Synthesys Interaction Studio.*

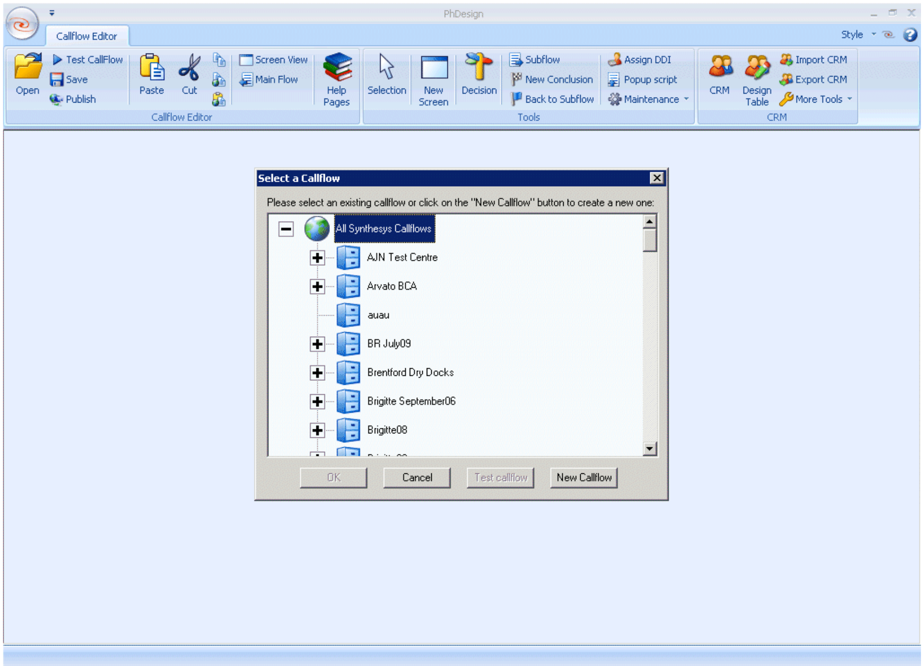
CREATING CRM ACCOUNTS

Starting the CRM Editor

To open the CRM editor

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab and in the Launch Applications screen select ***CRM***

The CRM editor will open, and in the *Select a Callflow* screen subsequently displayed, you can select an existing CRM, or create a new one.

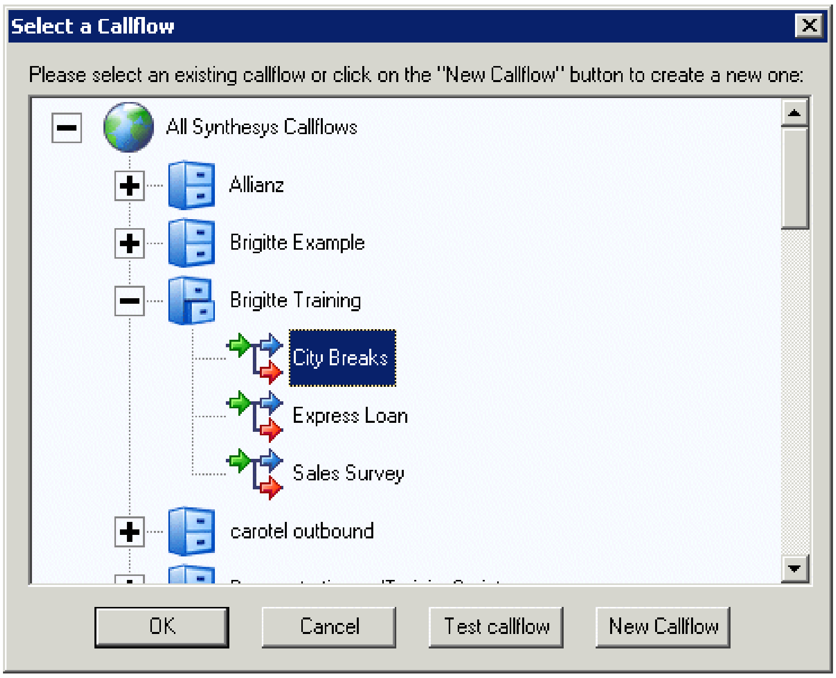


The Select a Callflow Screen

The *Select a Callflow* screen displays the customer accounts that you are managing and the CRM campaigns that you have set up.

A CRM is created to manage the customer data for Inbound and Outbound lists and to give agents access to customer profiles and histories.

The *Select a Callflow* screen, in which all accounts and campaigns are held



A filing cabinet represents a customer account.

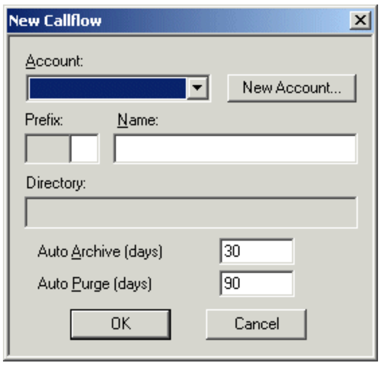
The open drawer represents a customer account that has been selected.

The arrows show a campaign for which a callflow has been created.

Setting up a new CRM Account

At the Select a Callflow screen:

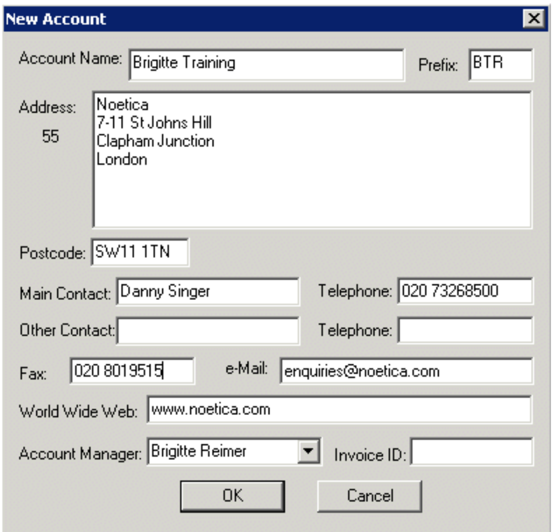
- Click on New Callflow to display the *New Callflow* window.



- Click on New Account... to display the New Account window and enter the details of the new account.
- The *Account Name*, *Prefix* and *Account Manager* fields are compulsory and must be completed.

The *Prefix* that you enter must be unique and only contain three letters. It is used to identify all data held against the account and allows easy identification of data held in database tables.

In our example we have entered account details for the 'Brigitte Training' account.



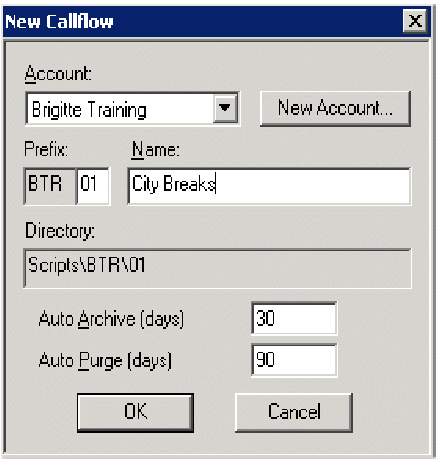
The *Account Name*, *Prefix* and *Account Manager* fields are compulsory and must be completed.

Once you have entered the required account details, click OK to save the details and return to the *New Callflow* window.

Setting up a new CRM Campaign

Back in the *New Callflow* window you now need to add a name for your campaign.

The name entered should reflect the campaign for which the CRM is created, in our example ‘City Breaks’.



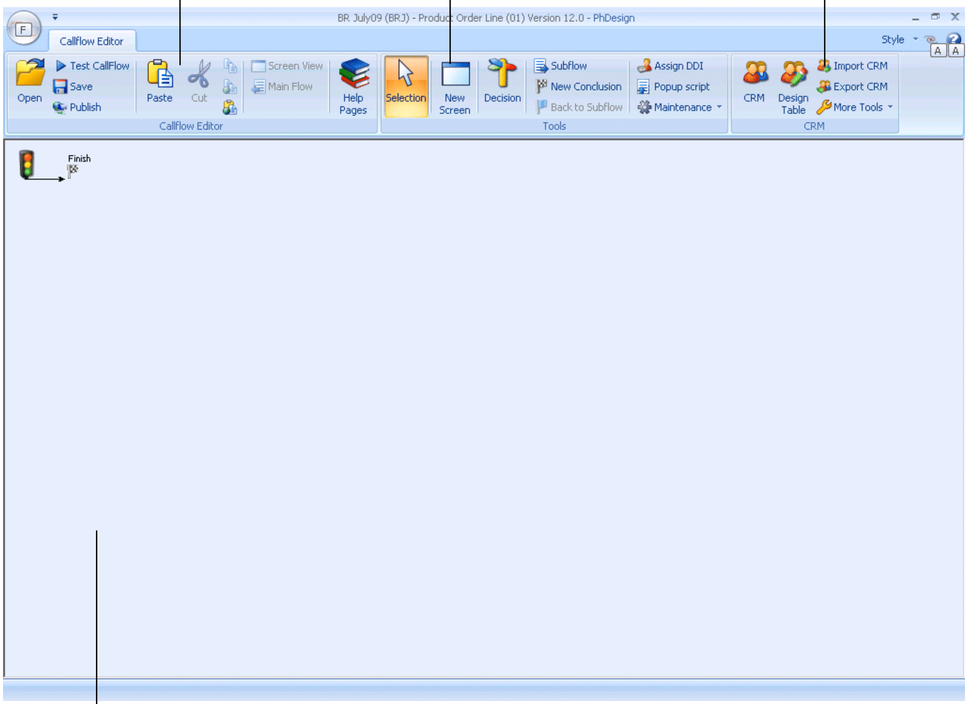
- Enter a name for the new campaign into the *Name* field.
- Click OK to return to the Select a Callflow screen, where the new campaign is added to the directory under the new customer account.

You do not need to make any changes to the default Auto Archive and Auto Purge settings, as these are not used in the current version of the Synthesys Dialler Platform.

USING THE CRM MAIN SCREEN

In the *Select a Callflow* screen, select the required campaign and click OK to display the *CRM Editor Main Window:*

Callflow Editor Toolbar. Tools Toolbar. CRM Toolbar.



Design Area in Flow View.

The following sections describe each of the elements indicated above.

THE TOOLBARS

The CRM editor main screen has three toolbars in *Flow View*:

- Callflow Editor Toolbar.
- Tools Toolbar.
- CRM Toolbar.
-

Callflow Editor Toolbar

The Callflow editor toolbar is used for opening, editing and publishing CRMs and for moving between screen view and flow view.

Tools Toolbar

The Tools toolbar in the Synthesys 5 is not used, as webflows are created in the Synthesys Interaction Studio, with DDI numbers being assigned in Synthesys Management.

CRM Toolbar

The CRM (Customer Relationship Management) toolbar is used to access and design CRM tables and to import or export customer data.

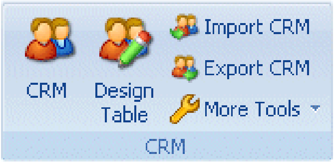
Via the *More Tools* drop down menu of the CRM toolbar users can maintain the CRM, deleting selected CRM history events and unused CRM prefixes.

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

The Callflow Editor Toolbar

Option	Description
	**Open.** Display the *Select a Callflow* window. From this window users can open an existing CRM or create a new CRM.
	**Test Callflow.** Testing of a CRM before it is published.
	**Save**. Save the currently displayed CRM.
	**Publish**. Publish the CRM to save it to the central server and to broadcast it to the entire call centre.
	**Paste.** Paste the contents of the Windows clipboard at the cursor /insertion point.
	**Cut**. Remove the currently highlighted selection and place it on the Windows clipboard.
	**Copy.** Copy the currently highlighted selection to the Windows clipboard.
	**Copy Global Block**. Copy a selected CRM and save it to the Global Gallery.
	**Insert Global Block.** Pick up a CRM from the Global Gallery.
	**Screen View***.* Switch the display to *Screen View* mode.
	**Main Flow.** Not used in this version, as webflows are designed in the Synthesys Interaction Studio using web controls.
	**Help Pages.** Not used in this version as Help pages for webflows are assigned in the Synthesys Interaction Studio.

The CRM Toolbar

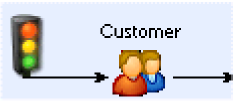


Option	Description
	**CRM.** Add Customer Relationship Management to be used in a webflow.
	**Design Table**. Opens the CRM Design Table to add any data fields, as required.
	**Import CRM.** Opens the CRM Import wizard guiding users through the process of importing customer data.
	**Export CRM.** Opens the CRM Export wizard to enable users to export customer data as a csv file.
	**MORE TOOLS. To access CRM maintenance and the Synthesys Global Gallery via a drop down menu:**
	**History Cleanup**. Delete specified CRM history events selecting CRM prefixes and date range.
	**Delete Prefixes**. Delete unused CRM prefixes. A CRM prefix can only be deleted if it is no longer used in a campaign.
	**CRM Control Gallery**. Not used in the current version, as webflows are designed in the Synthesys Interaction Studio using web controls.

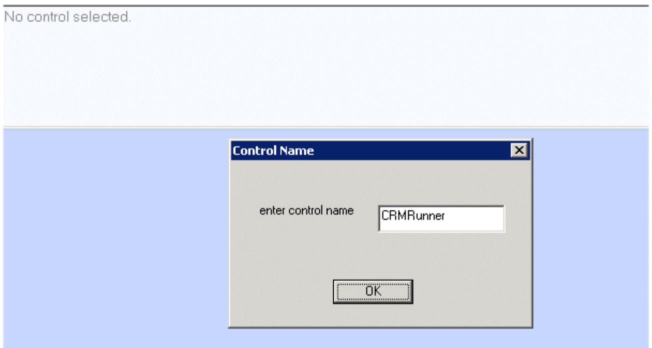
ASSIGNING CRM

The CRM  icon (Customer Relationship Management) is located on the *CRM* toolbar in the CRM editor.

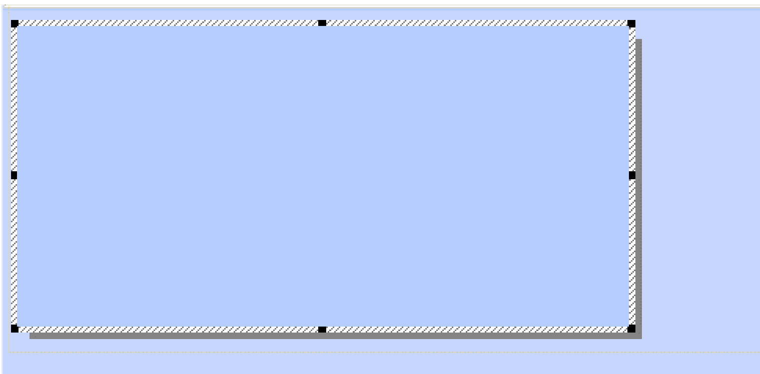
- Click your left mouse button on the CRM icon.
- Place your cursor between the traffic light and the conclusion flag and drop the CRM with a click of the left mouse button.
- Enter a short descriptive name for the CRM.



- Open the CRM screen view with a double click of the left mouse button.
- Enter a name for the *CRMRunner* control and click OK to add the control.



No information will be displayed until the CRM table has been created in the *Maintenance* page and details have been configured in the CRM *Properties* page.



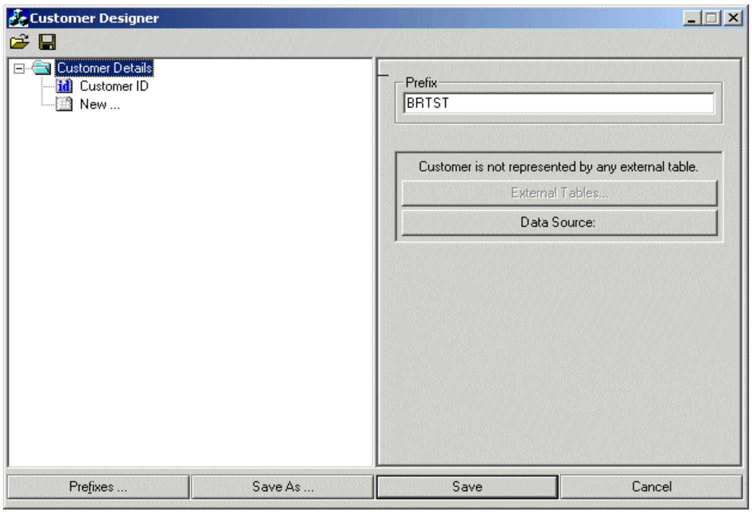
See next page for creating the CRM table.

Creating a new CRM Table

When creating the CRM table, carefully check the data fields of the customer file that you wish to import and ensure that you create the same number of fields in your CRM table.

- Click on the Design Table  icon on the *CRM* toolbar or right click on the CRM control and select ***Maintenance*** from the drop down menu.

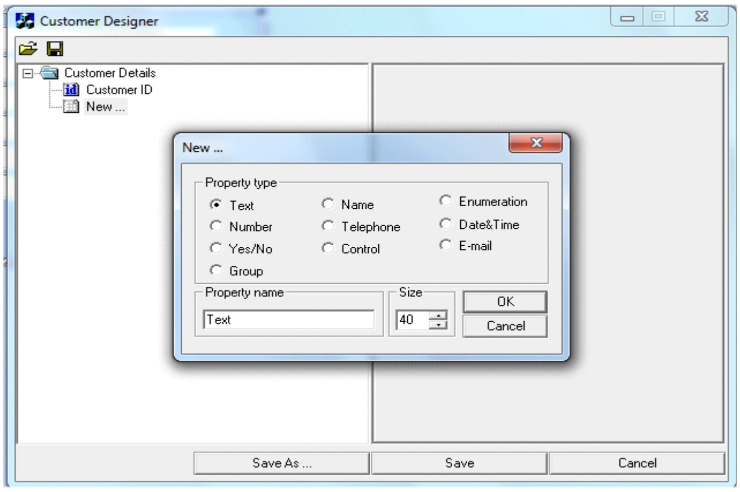
- Select *Customer Details* in the window on the left and enter a unique prefix into the ***Prefix*** window on the right. The prefix can contain up to 6 characters.



Enter a unique CRM Prefix

For information regarding External Database Links contact your Noetica Account Manager.

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

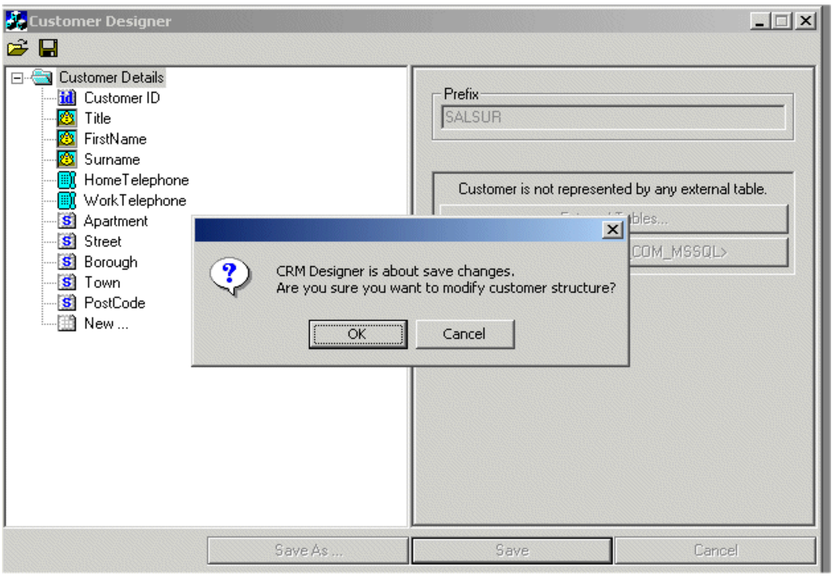


To enable CTI Auto Search always use a Telephone field to capture the customer's telephone number, and the Email field to capture the email address when using Email OB campaigns as part of your recycling rules.

Saving your CRM Table

Before saving your CRM table, carefully check that the fields in your CRM match the data fields of the customer file that you are going to import.

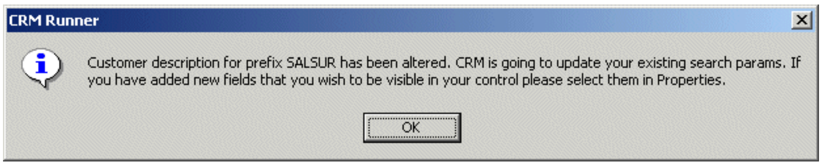
Click ***Save*** to save your CRM table.



To save an existing CRM under a new prefix use the *Save As* option.

If you are editing an existing CRM table click YES to ‘Are you sure you want to modify customer structure’.

The subsequent message displayed informs you that you must go to the CRM ***Properties*** dialog and tick any tab headings and CRM fields that you want to be visible when running the CRM in the CRM editor, for example to edit customer details.

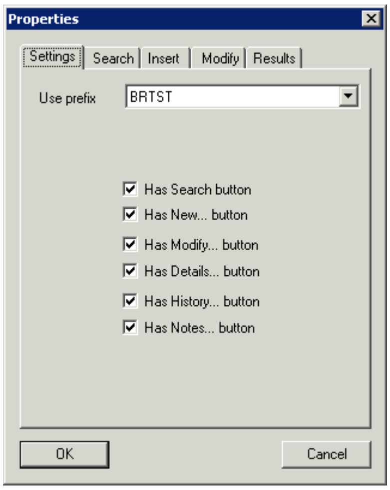


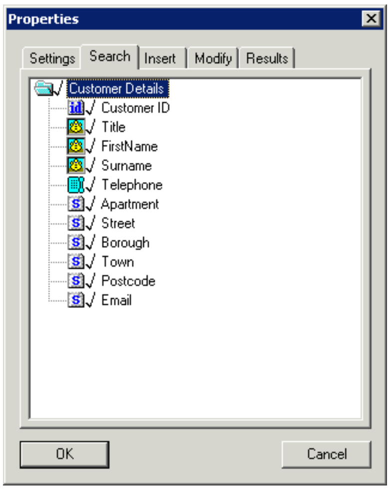
CRM Properties: Settings & Customisation

To open the CRM Properties dialog:

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

Placing a tick into the available options *Search, Insert, Modify and Results* will enable the corresponding icons to allow access to the selected fields when running the CRM in the CRM Editor.





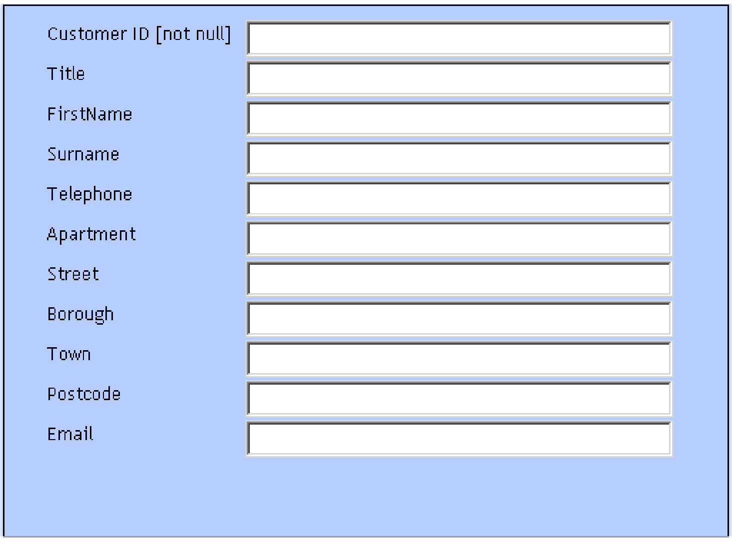
Search: Fields enabled for customer search.

Insert: Fields enabled to enter new customer details.

Modify: Fields enabled for updating customer records

Result: Fields displayed in the ambiguity list.

Click **OK** to display your Customer Relationship Management table.

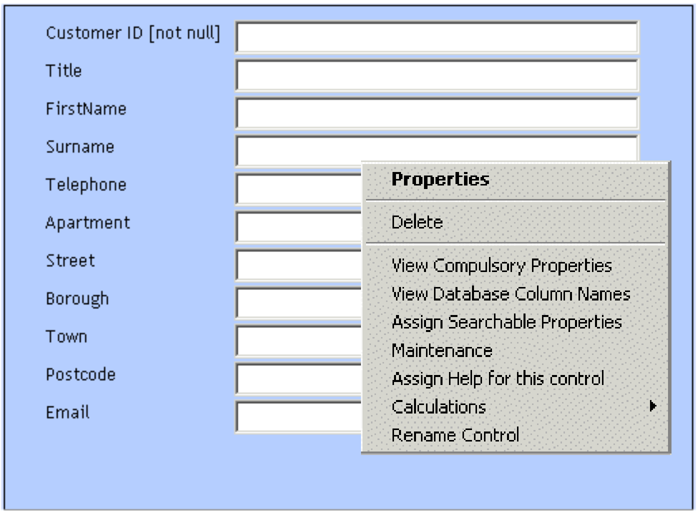


Click the Flow View icon to return to the CRM Editor, then ***Save*** and ***Publish*** the CRM.

Viewing & Editing a CRM

To view or edit an existing Customer Relationship Management table:

- Double click on the CRM section in the CRM editor.
- To add, edit or delete fields in the CRM table, right click on the CRM and select **Maintenance** to open the Customer Designer.
- To view or configure the settings in your CRM table, go to **Properties** and tick any newly added fields to display them when testing your CRM in the Campaign editor.



Picking up an existing CRM Table

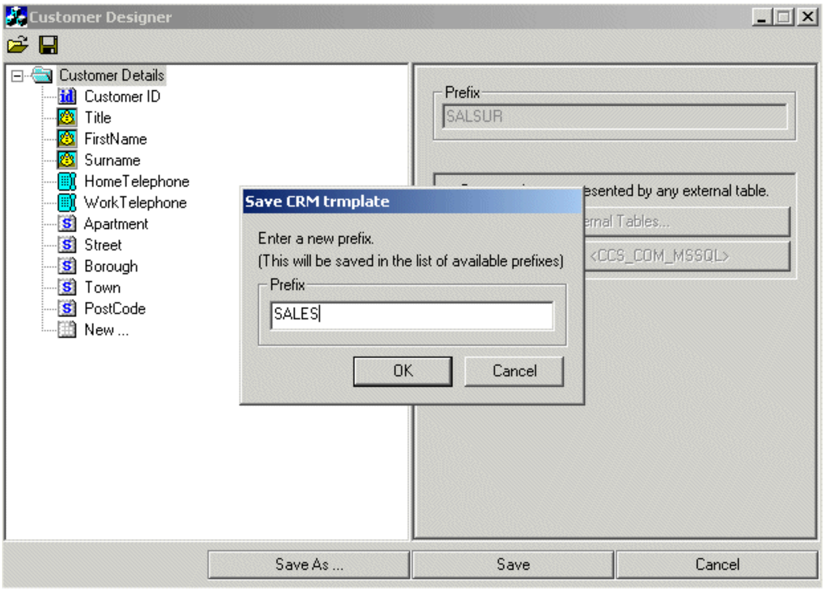
To reuse an existing CRM table prefix, together with all associated customer data:

- Pick up a ***CRM*** icon  from the **CRM toolbar** in the CRM editor.
- Place it between the traffic light and the conclusion flag and enter a short descriptive name for the CRM screen.
- Open the CRM screen with a double click of the left mouse button and add a name for the CRM Runner control.
- Right click on the control, select **Properties** and in the *Properties* window **select the required CRM table prefix** from the drop down list.
- Tick any CRM fields that should be displayed when running the CRM in the CRM editor.

Saving an existing CRM under a new Prefix

Use the ***Save As*** option in the *Customer Designer* dialog if you want to use an existing CRM, but <u>not</u> the customer data associated with the selected CRM prefix.

- Click ***Save As***, enter the new CRM prefix into the dialog displayed and click OK.
- Go to the ***Properties*** page of the CRM to check that the new prefix is now displayed.



- If the new CRM prefix is shown correctly in the CRM Properties page, return to the ***CRM Maintenance*** dialog.
- Make any changes to the new CRM table as required, before importing the new customer data.

Remember to go back to the CRM **Properties page** to tick any newly added fields so that they will be displayed when testing your CRM in the CRM editor.

Click **OK** to confirm the changes made, then ***Save*** and ***Publish*** your CRM.

CRM DATA IMPORT & EXPORT WIZARD

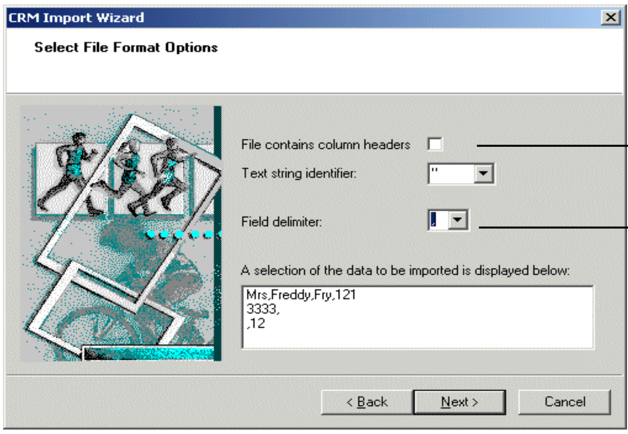
The ***CRM Import*** and ***Export wizards*** enable users to import customer data into a CRM table and to export subsequent changes made to the CRM data to a CSV file.

The respective CRM Import and Export wizards provide a step-by-step guide to importing and exporting your customer records.

The CRM Data Import

To use the CRM Import facility:

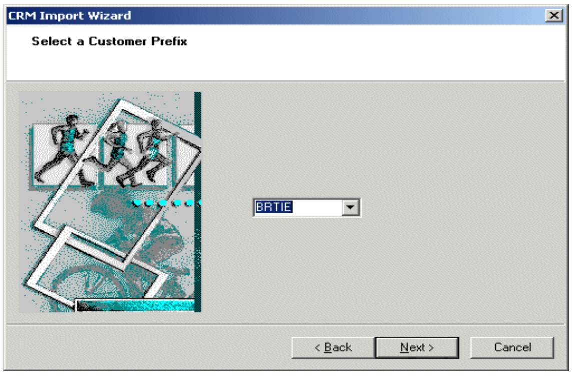
- Click the ***Import CRM***  icon on the CRM toolbar in the CRM editor.
- Select the file containing your customer data from the *Select a file* window and click Next> to move to the next page of the CRM Import wizard
- Select the type of file that you wish to import from the **Field delimiter** menu, i.e. comma to import a comma- separated file.



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

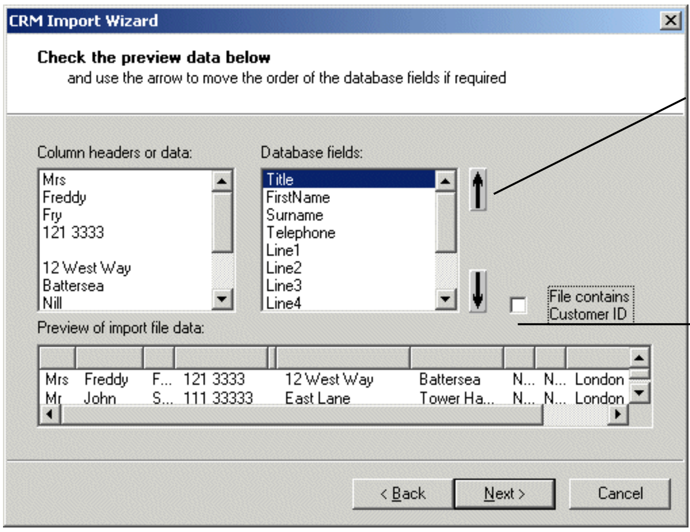
Select the ***comma*** to import a comma-separated (.csv) file.

- In the next page of the wizard, select the **CRM prefix** that you wish to use for the Import from the drop down menu.



Click ***Next>*** to move to the next page of the Wizard

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



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

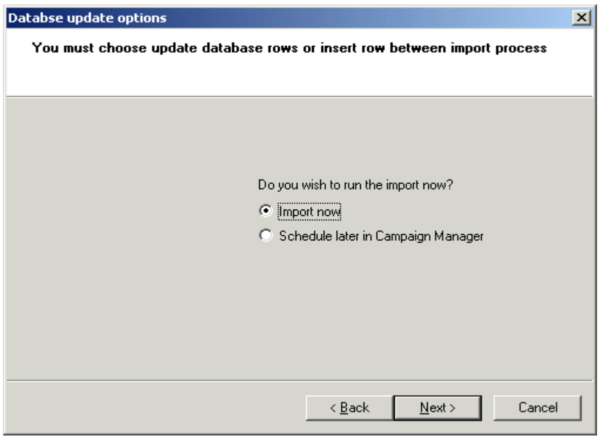
Place a tick in the check box when importing customer data with ***Customer ID***.

In the ***Database Update Option*** window of the CRM Import Wizard you can either:

- Import the customer data immediately or
- Schedule a CRM data import at a later stage in the Campaign Manager.

Importing CRM Data Immediately

To import the customer data immediately, tick the **'Import Now'** option.



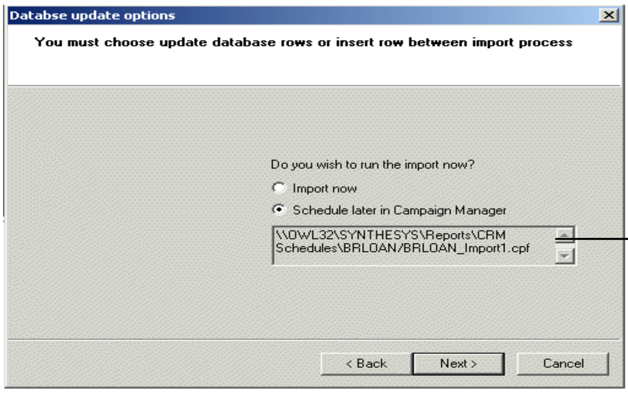
The final page of the CRM Import Wizard provides a summary of all your selections. Check the details, before clicking 'Finish' to import the customer data.

If you need to make any changes, use the <Back button. To abandon the action without importing customer data, click Cancel.

Scheduling a CRM Data Import

To run the customer data import at a later stage, select the option ***Schedule later in the Campaign Manager*** in the *Database Update Option* window of the CRM Import wizard.

Make a note of the file path displayed or copy it, as you will need to enter this file path when scheduling the data import in the Campaign Manager.

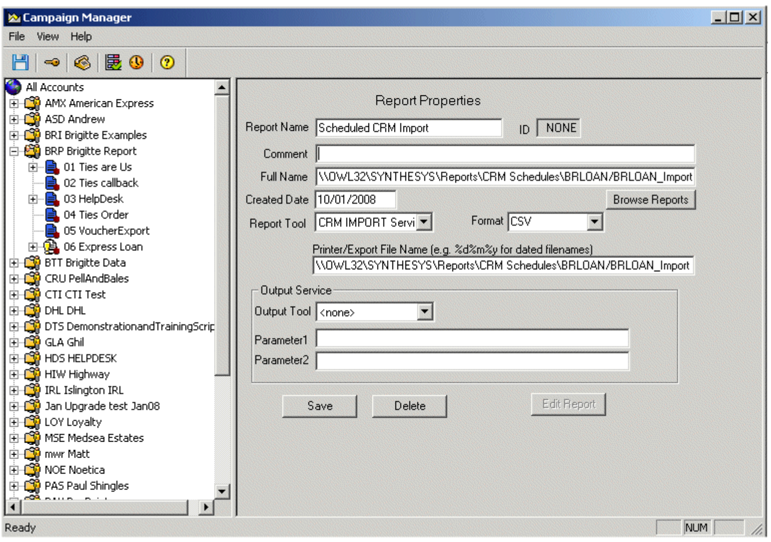


Make a note of the file path, as you need this, when scheduling the data import in the Campaign Manager.

In the final page of the CRM Import wizard check the summary provided, before clicking 'Finish'.

Set-up in the Campaign Manager

In the Synthesys Campaign Manager, set up and schedule your CRM data import.



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

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

Ensure that you have selected **'CRM Import Service'** as your *Report Tool.*

Click **Add Schedule** and define the time and frequency for your CRM data Import.

CRM Data Export

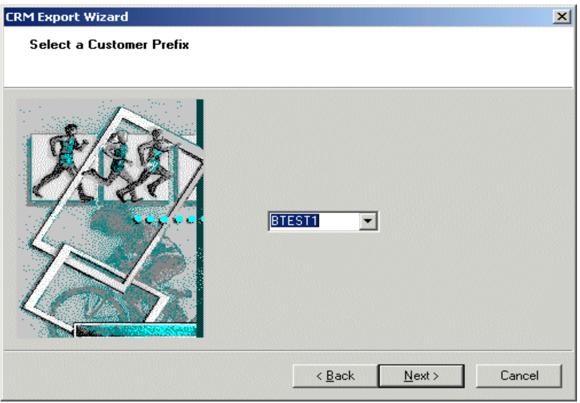
To export customer data from the Synthesys database tables:

- Click the ***Export CRM***  icon on the CRM toolbar in the CRM editor.
- In the ***Select a file*** dialog select the path and enter the file name for your customer data export.

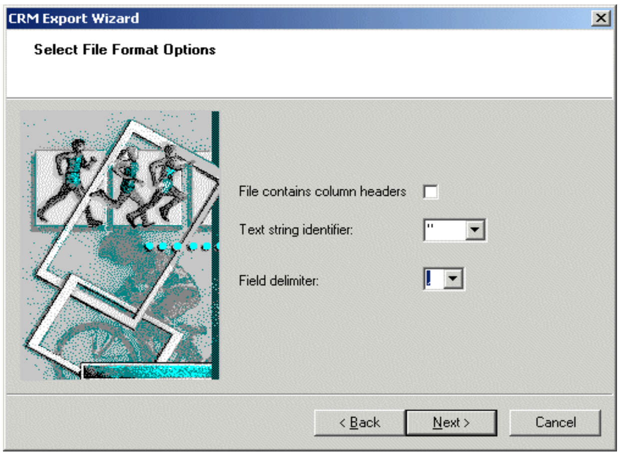
The CRM Data Export

In the CRM Export wizard subsequently displayed:

- Select the **CRM prefix** that you wish to use for your data export in the *Select a Customer Prefix* dialog of the wizard.



- In the next page of the CRM Export wizard, choose whether or not to include column headings and the format for exporting the customer data.



Click the <*Back* button to make changes or *Cancel* to abandon the action without saving any changes made.

Move to the Next> page of the wizard and check the summary provided, before clicking ***Finish*** to export the customer data.

EXAMPLE OF CRM IMPORT FILES

Stages of CRM Fast Import

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

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

CRM Fast Import creates the following files:

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

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

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

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

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

VoucherID.csv.update.txt

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

VoucherID.csv.log.txt

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

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

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

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

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

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

VoucherID.csv.log.BulkCopy.txt

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

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

Differentiate.txt Files

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

VoucherID.csv.log.Differentiate.txt

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

VoucherID.csv.log.DifferentiateUpdate.txt

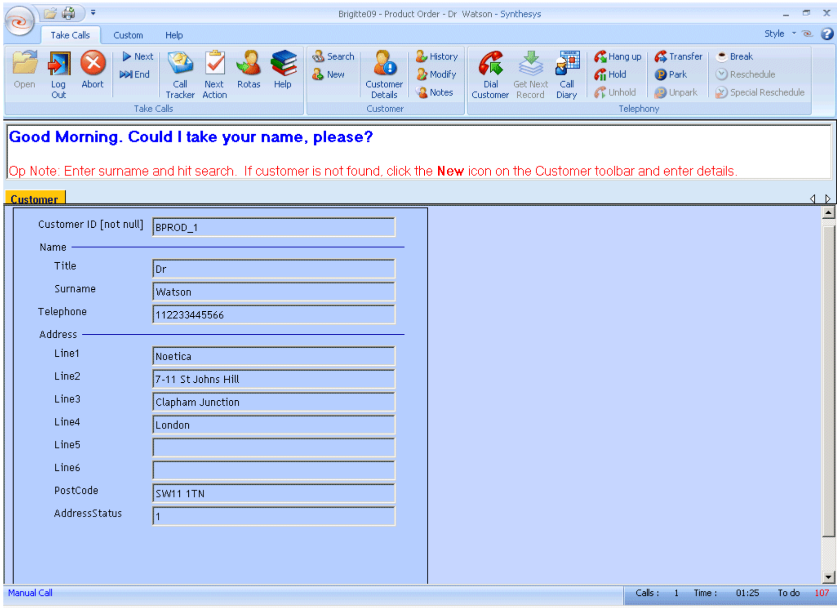
The file *VoucherID.csv.log.DifferentiateUpdate.txt* contains all records that failed when updating an existing CRM. You can use this file to correct the records as required and then import them again.

VoucherID.csv.log.DifferentiateBulkCopy.txt

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

TESTING YOUR CRM

Use the TestCallflow  icon to run the CRM (Customer Relationship Management) in the CRM editor to check details or to add or modify customer details, as required.



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

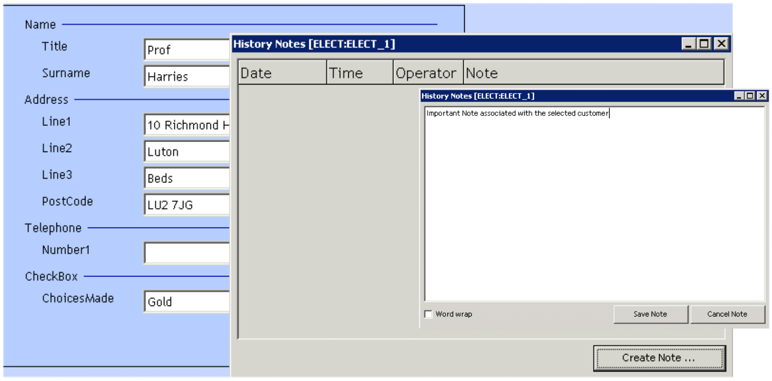
Option	Used To
	**Search**. Enables the search for existing customer details.
	**New**. Add a new customer.
	**Modify**. Allows the modification of existing customer details.
	**Details**. Displays customer details.
	**Notes**. Display and add information related to the customer.
	**History.** Access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

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

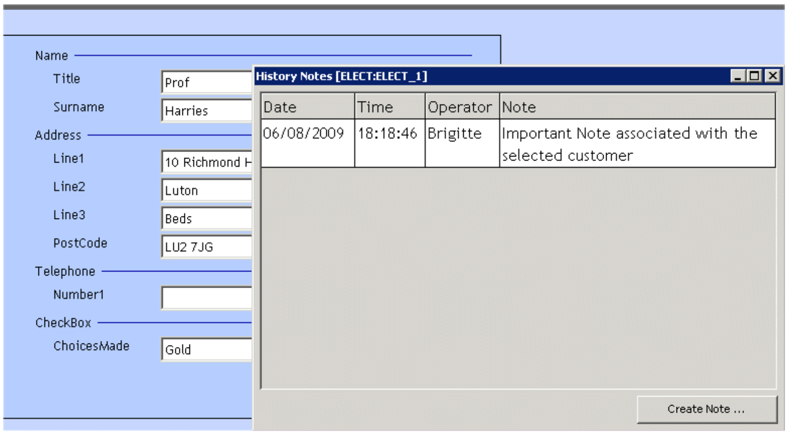
Attaching Notes to a CRM Record

In some cases CRM designers may wish to attach notes or documents with information related to the selected customer.

- To add a note you need to take a test call  and using the Search  icon, select a customer record.
- Click the **Notes**  icon on the *Customer* toolbar in the agent view.
- In the *History Notes* dialog subsequently displayed click on ***Create Note,*** to enable the text box.



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



If 'auto pop notes' is enabled, the CRM notes page will open automatically together with the CRM customer record, when running the test call.

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

Attaching a Document to a CRM Record

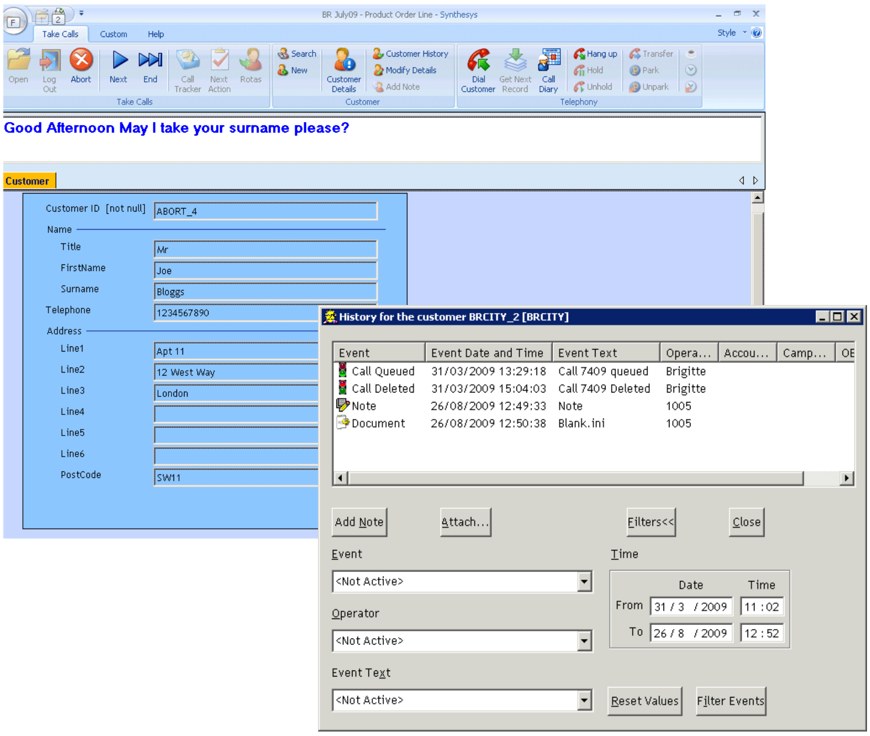
To attach a **document**:

- Take a ***Test call***  and using the ***Search***  icon, select a customer record.

- Click the **History**  icon and then the **Attach..** tab.

- In the *OpenFile* dialogue, browse for the document to attach to the customer's record.

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



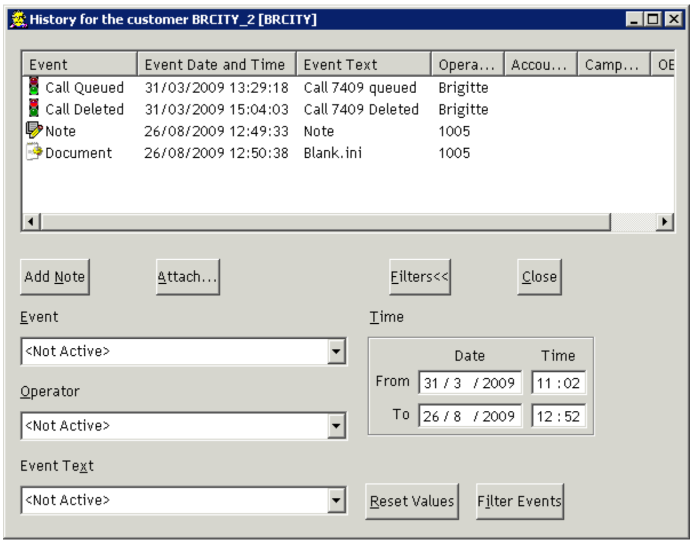
To read a note or to view the content of an attached document in the CRM **History window**

- Double **click** on the **Note** or **Document** in the *Event* column, to open the required note or document.

Accessing Customer History

To access historical events associated with the selected CustomerID:

- Take a test call and using the Search icon, select a customer record.
- Click the **History** icon to open the ***History for the Customer…***. dialog.



- To display selected information only, click the **'Filter'** button and enter the required search criteria into the *Event, Operator ID* and *Event Text* fields.
- To display all information again, click the **Reset Values** tab.

CRM MAINTENANCE

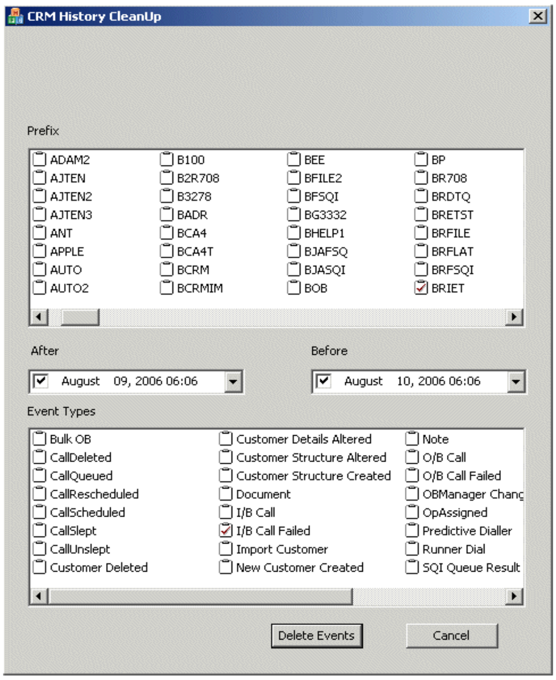
Selected CRM History events and unused CRM prefixes can be deleted in the CRM editor of the Synthesys Dialler Platform.

CRM History Cleanup

To clean up CRM history events:

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

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



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

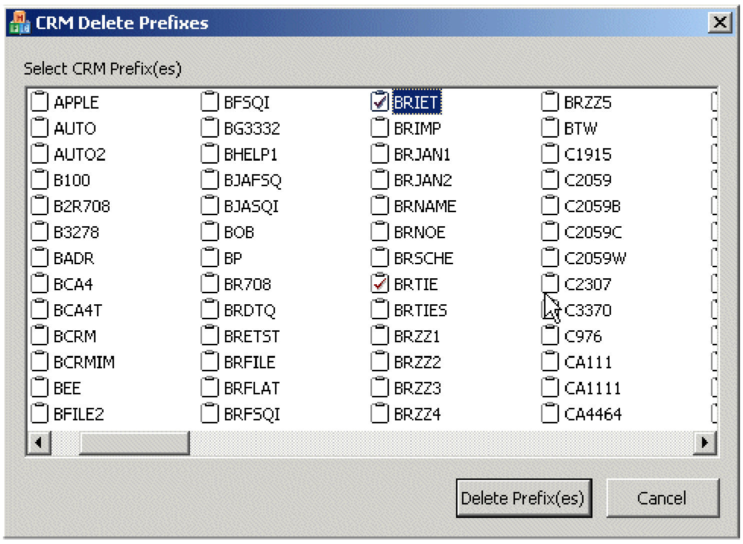
Click the **Delete Events** button to delete the selected history events or **Cancel** to close the *CRM History Cleanup* dialog without deleting any history events.

CRM Delete Prefix

To delete CRM prefixes:

- Expand the ***More Tools*** option of the CRM toolbar.
- Click the ***Delete Prefixes*** icon.

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



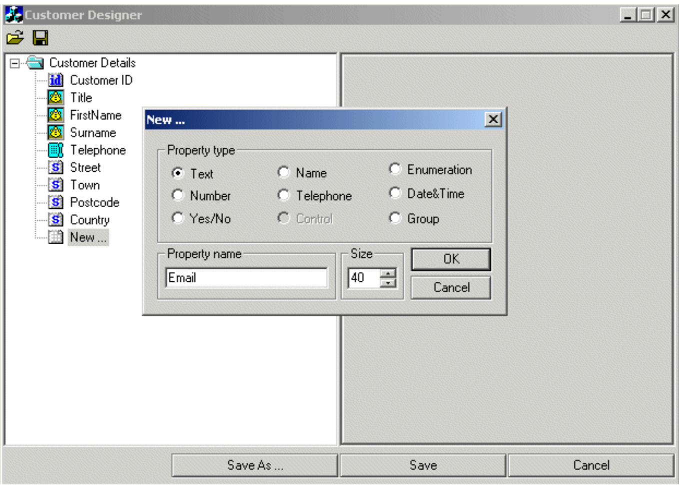
- Click the **Delete Prefix(es)** button, to delete the selected CRM prefixes.
- Click **Cancel**, to close the *CRM Delete Prefixes* dialog, without deleting the selected CRM prefixes.

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

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

OUTBOUND WIZARD

Creating a new CRM



Adding an Outbound List & selecting a Team

OUTBOUND WIZARD

The Outbound Setup Wizard is used to:

- Create new accounts, campaigns, CRM tables and Outbound lists
- Edit existing CRM tables and Outbound list settings
- Link an Outbound list to an associated Synthesys webflow

The *Outbound Setup Wizard* provides a steps-by-step guide through the various stages required.

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

CRM (Customer Relationship Management) tables will hold the customer data, allowing access to customer profiles and histories and to enable Outbound calling.

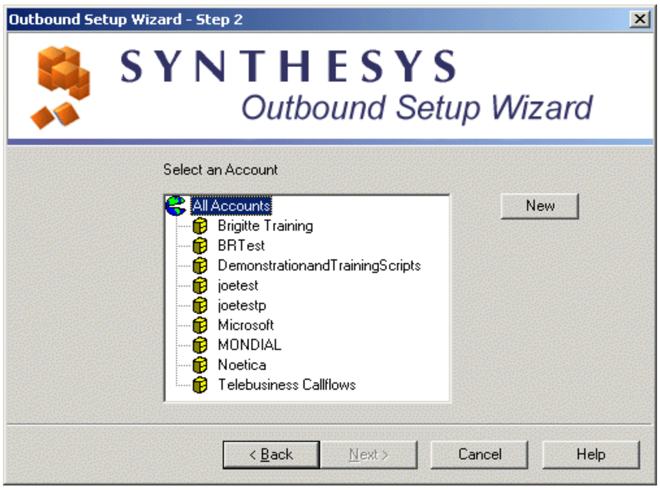
The Call lists of customers to be phoned are created and managed in the Outbound module of the Synthesys Dialler Platform.

Creating or Selecting Accounts

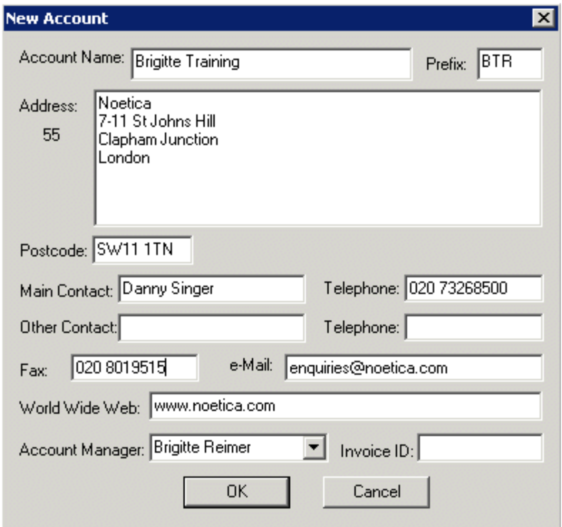
To create or access an account:

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab and in the Launch Applications screen select ***Outbound Wizard.***
- In the ***Outbound Wizard*** click Next> to move to page 2 of the wizard.

The ***Select an Account*** screen displays a list of all accounts set up in the Synthesys Dialler Platform.



- To ***edit a CRM*** for an existing account, select the account where the CRM is stored and move to the next page of the wizard.
- To **create a new account**, click the ***New*** button and enter the details for the new account into the ***New Account*** dialog.



The *Prefix* must be unique and contain three characters. It is used to identify all data held against the account in the database.

The ***Account Name***, ***Prefix*** and ***Account Manager*** fields are compulsory and must be completed.

Click OK to save the details and move to the Next> page of the *Outbound* wizard.

Adding or Selecting CRM Campaigns

Step 3 of the *Outbound Setup* wizard displays a list of all CRM campaigns that have been set up under the selected account.

- To modify an existing CRM click the ***Modify*** button. You can then add, modify or delete CRM fields in the CRM Designer dialog. Please see next page for more information.
- To create a new CRM table click the ***New*** button and enter the required details.

Entering details for a new CRM campaign

- Add the prefix for the new CRM table into the ***CRM Prefix*** field. The prefix can contain up to six characters. In our example: 'BRCITY'.
- Enter a name for the CRM campaign into the ***Name*** field. The name should reflect the name of the account or webflow for which the CRM is created.

The CRM prefix <u>must be unique</u> as it is used to identify the customer data held in this CRM in the database.

The default Auto Archive and Auto Purge settings do not need to be changed, as they are not used in the current version of the Synthesys Dialler Platform.

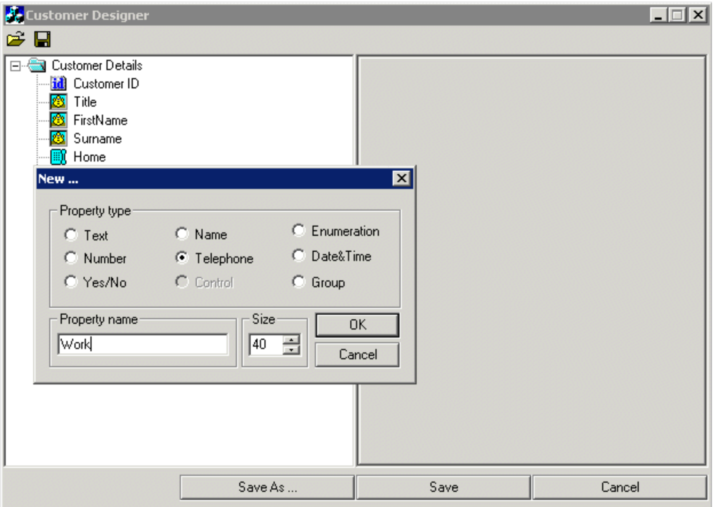
Click OK to open the Customer Designer, where you add the required CRM fields.

Adding and Modifying CRM Fields

Adding new CRM Fields

To add new fields to your CRM table:

- Double click **New** in the tree structure on the left-hand side.
- In the 'New' window subsequently displayed tick the required property type (i.e. *Telephone,* if the field is to capture a telephone number or email address) and enter an appropriate name for the field.



Use a Telephone field to capture the customer's telephone number to enable CTI Auto Search.

Having added all required fields, click ***Save*** to save your CRM table.

Modifying existing CRM Fields

- To **rename** a CRM field, right click and highlight the existing name and type in the new name.
- To **delete** an existing CRM field, select the field and press ***Delete*** on the keyboard.

When saving, click YES to 'Are you sure you want to modify customer structure'.

The CRM Runner message subsequently displayed reminds users to configure the control in the CRM Properties page in the CRM editor if they wish to add or modify customer details using the CRM editor.

Move to the next page of the *Outbound Wizard*, to select or add an Outbound list for the selected CRM.

Adding or Selecting Outbound Lists

In the *Select an Outbound Campaign* screen, you can select an existing Outbound list or add a new Outbound list for the selected CRM.

- To edit the settings of an existing Outbound list, click the ***Modify*** button. Please see next page for more information.
- To add a new Outbound list, click the ***New*** button and enter the required details.

Entering details for a new Outbound List

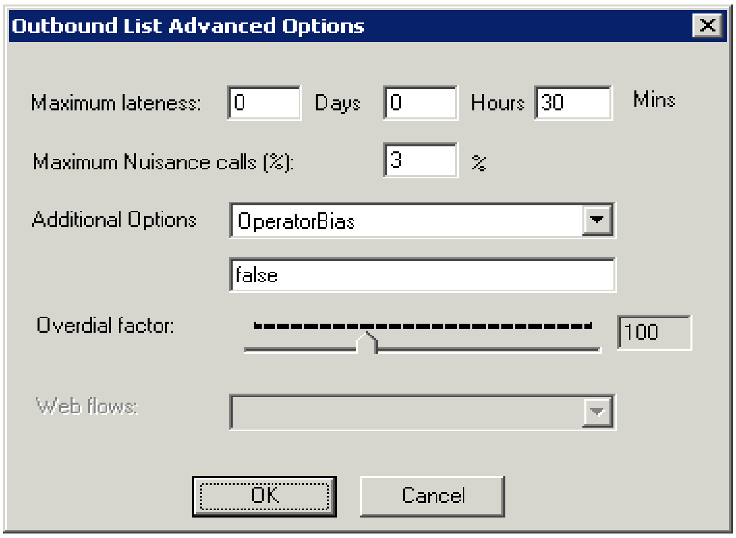
- Add the name for the new Outbound list into the ***Name*** field.
- To set up a predictive Outbound list, tick the ***Predictive*** check box.
- If you wish to assign the Outbound list to a team, select the relevant team.

New Outbound lists will be activated immediately by default, with the Active Times being set to Office hours: 09:00 to 17:30.

Setting Advanced Options for Outbound Lists

In the Outbound List Properties dialog:

- Click the **Advanced** button, to open the *Outbound List Advanced Options* window.
- Set ***Maximum lateness*** to specify the time range in which rescheduled calls will be re-presented to the agents.
- For predictive Outbound lists you can also specify the maximum level of nuisance calls in %.



- ***Over dial factor***: Moving the slider (default setting 100%), the amount of over dial for predictive OB campaigns can be increased or decreased.

Please see next page for information about additional available Outbound property settings, available via the ***Additional Options*** drop down menu.

Additional Advanced Outbound List Options

Available Options	Use
CallBackMaxDaysFromListEnd	Enter the number of days for which call-backs can be rescheduled at run time, AFTER a campaign has expired (the Date Time the agent selects is compared to 'campaign end date' +N). If agents select a later date, a message showing the latest possible date (YYYY/MM/DD) for selection is displayed.
CallBackMaxDaysFromToday	Enter the number of days, from selection (current date +N), for which call-backs can be rescheduled at run time. If agents select a later date, a message showing the latest possible date (YYYY/MM/DD) for selection is displayed.
CallBackActiveTimesOnly	Enter True (False) to specify that call-backs can only be rescheduled within (outside of) an OB lists active time periods. If the day/time selected does not pass validation, agents will see the message 'you must reschedule this call during campaign active times'.
DedupeQueueOnTelephone	If set to ***True*** (False) a duplicate check will be carried out on the Queue table to ensure that when queuing new records, no duplicate telephone numbers will be added to an Outbound list. Instant call-backs will be queued as before.
Dial Preference	Enter ***Sleeping, Queued*****, or** ***Both*** to determine if due sleeping or queued calls should be dialled first, or if a mixture of both should be presented to agents in order of their QueueID. ***Deactivate and re-activate*** the OB list to refresh the internal PD dialling list.
Dial Prefix	An appropriate dial prefix can be entered (eg 9 to dial out).
Dial Order	Instruct the dialler in which order to retrieve queued items. Enter ***ReverseID*** if new Queue items should be presented to agents before old Queue items. Enter ID, to present older queued items before the newly queued calls. ***Deactivate and re-activate*** the OB list to refresh the internal PD dialling list.
Idle Timeout	Idle Timeout is used to automatically pop preview Outbound lists and rescheduled calls to your agent's workstation. ***To enable Idle Timeout****,* specify in seconds (i.e. 15), the automatic screen pop of the next preview record. By default, no Idle Timeout is set and agents need to click the *Get Next Record* icon at run time to request the next preview call.
MaximumNextCallLateness	Specify in minutes the maximum lateness by which ***calls requested via the Call Diary*** (Call Next) should be presented to the agent, before they will be recycled as missed latest time.

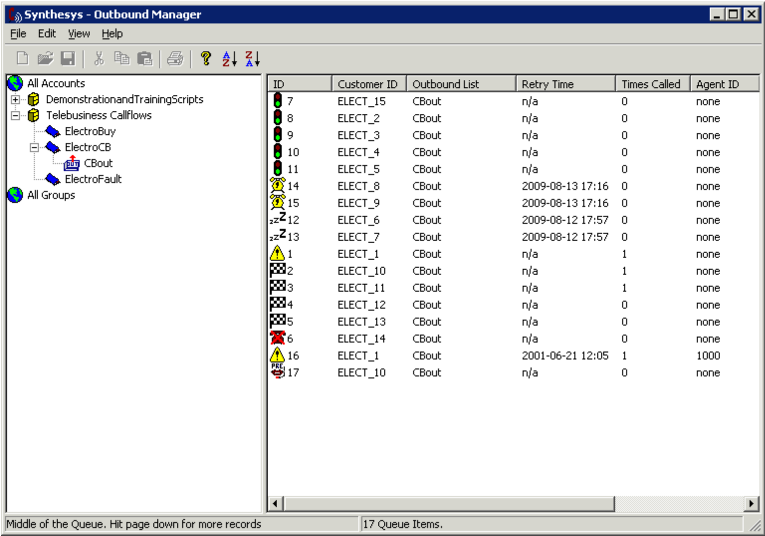
Available Options	Use
MinCallsBeforePredictive	Enter the minimum number of calls to be dialled for this campaign, before predictive dialling starts, max is 99.
Operator Bias	True or False. If true, rescheduled calls due will only be presented to the agent that scheduled the call, if false, rescheduled calls will go to any agent.
Priority Order	Enter None, Asc or Desc to specify the order in which to present priority calls. Entering Desc will present calls with higher priority settings first. Deactivate and re-activate the OB list to refresh the internal PD dialling list.
Rescheduled Flags	Enter C.L.A and/ or P to determine how the Reschedule dialog is presented to agents when aborting preview or predictive outbound calls.
Use do not call list	True/ False. If True, allows Synthesys to check the telephone numbers in the PHOENIX_DoNotCallList table and to remove associated records from the Outbound call list.
UseMaxLatenessOnSleeping	***True/ False.*** Set to True to set a latest re-try time for presenting sleeping calls at run time. If not presented, they will go to advanced recycling rules as missed latest call.
Recording	*The Recording options are available when using the Synthesys Voice Platform. Select **Recoding** and enter the word **True**, to record the conversation of both the agent and the customer.*
RecordingAgent	*Select and set **RecordingAgent** to **True**, to create a recording file for the conversation of the agent.*
RecordingCustomer	*Select and set **RecordingCustomer** to **True**, to create a recording file for the conversation of the customer.*
MusicOnHold	*To play music when the caller is put on hold, enter the name of the WAV file to be used, i.e. CypressGoats.wav. The WAV file selected has to be stored in the Synthesys Voice Platform WAV folder.*

To return to the *Outbound List Properties* dialog, click OK.

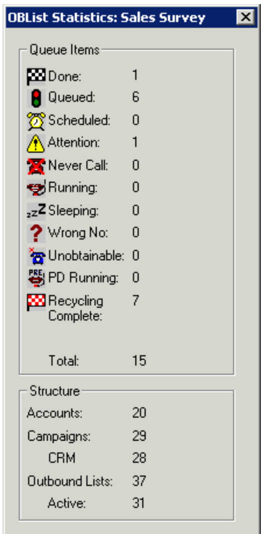
For more information about Rescheduled Flags, please see the section 'Outbound Management - Reschedule Flags'.

OUTBOUND MANAGEMENT

Creating Call Lists



View Call Statistics



OUTBOUND

The Outbound Manager

Once a campaign has been assigned CRM (Customer Relationship Management) you can add the required Outbound lists.

As part of setting up the Outbound list, you specify the date and time frame during which the call should be taken, assign a priority to the Outbound list and create your call list, queuing all customers to be contacted.

In the advanced properties dialog of the Outbound list you then specify the name of the server and the Synthesys webflow that is to be used with the CRM campaign.

Noetica Predictive Dialler

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

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

Selective Queuing Import ("SQI")

The Selective Queuing Import ("SQI") utility allows the user to import, update and queue customer records from an external database, using the existing Synthesys CRM and Outbound mechanisms. The SQI Wizard provides a guide through the various steps of setting up a Selective Queuing Import.

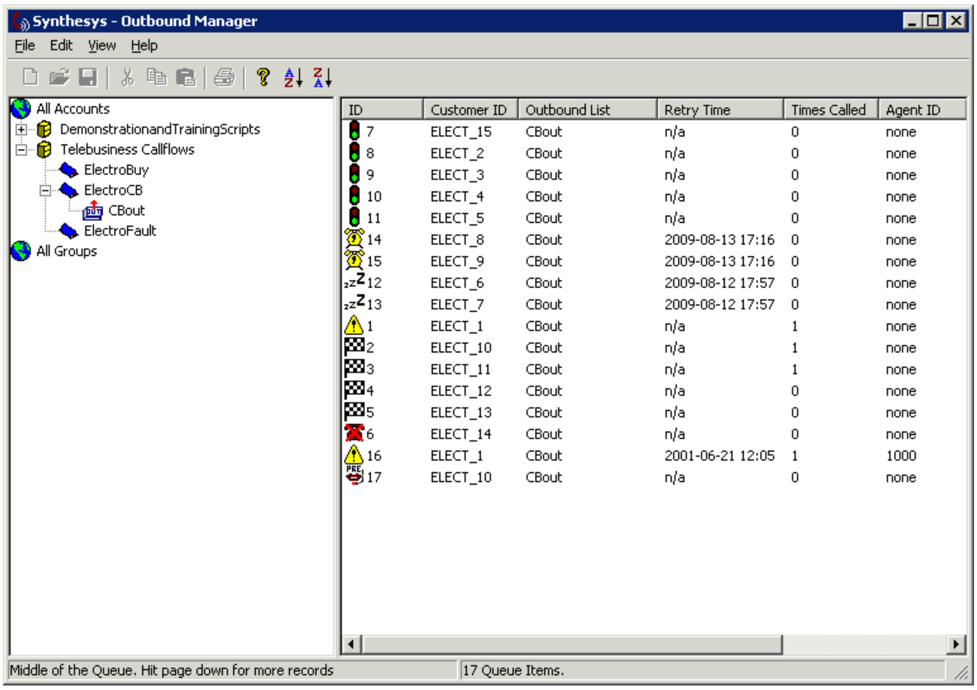
Synthesys Scripted Call Recycling

Using Synthesys *Scripted Call Recycling,* simple and complex recycling rules can be created. Using branching and a range of icons in a *Recycling script* the type of action to be taken on a call can be determined. Every recycling rule ends up in a conclusion, specifying what should happen next to the call.

The Outbound Manager Main Screen

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

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab and in the Launch Applications screen select ***Outbound.***
- Double click on the ***All Accounts*** icon in the left-side window and click on the plus sign next to the desired account to display the CRM campaigns for that account.
- To display inactive Outbound lists, as well as active Outbound call lists in the tree structure, select the ***Display Inactive OBCampaigns*** option via the ***View*** menu of the Outbound Manager.



A blue book next to a campaign shows that a CRM (Customer Relationship Management) has been added to this campaign.

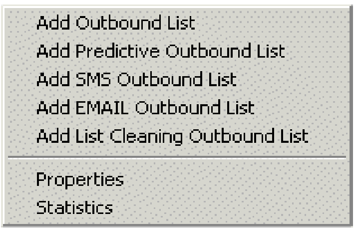
You can only attach an Outbound list once you have created a CRM (Customer Relationship Management).

You need to Publish the CRM campaign to display it in the Outbound Manager.

ADDING PREVIEW OUTBOUND LISTS

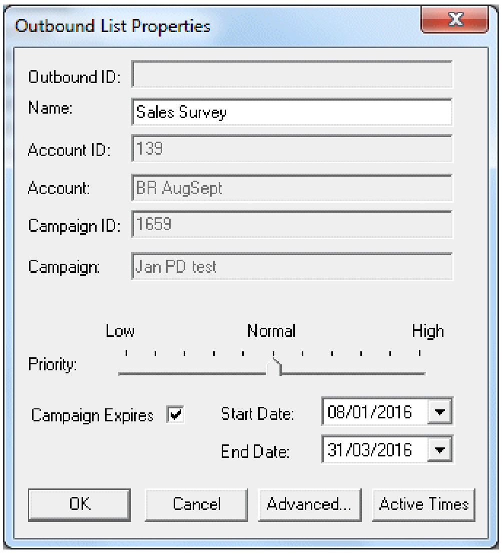
To add a preview Outbound list:

- Right click on your campaign in the **Outbound** manager and select ***Add Outbound List*** from the drop down menu.



- In the ***Outbound List Properties*** page now displayed, enter a name for the Outbound list into the *Name* field.

Account and campaign details are displayed automatically.



If required, tick ***Campaign Expires*** and select the *Start Date* and *End Date* during which you want to run the Outbound list.

Use the slider to assign the level of priority for the Outbound list.

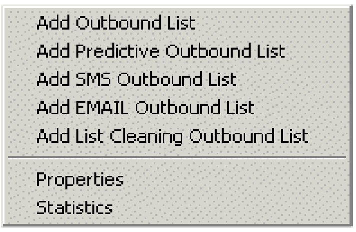
*Please see the section **Setting Active Times** for information about setting the time periods for presenting queued calls to the agents.*

*The section **Advanced Options for Outbound lists** contains information about the various settings available to customize the way OB calls are presented to agents.*

ADDING PREDICTIVE OUTBOUND LISTS

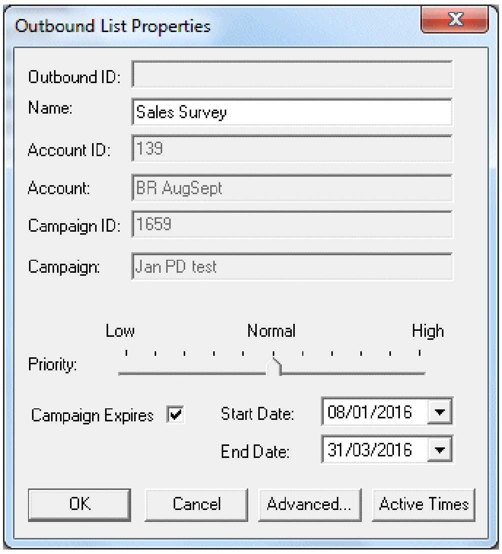
To add a predictive Outbound list:

- Right click on your campaign in the **Outbound** manager and select ***Add Predictive Outbound List*** from the drop down menu.



- In the ***Outbound List Properties*** page now displayed, enter a name for the Outbound list into the *Name* field.

Account and campaign details are displayed automatically.



If required, tick ***Campaign Expires*** and select the *Start Date* and *End Date* during which you want to run the predictive Outbound list.

Use the slider to assign the level of priority for the Outbound list.

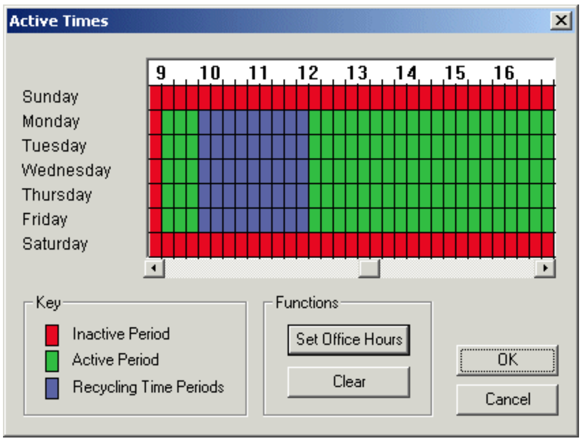
*Please see the section **Setting Active Times** for information about setting the time periods for presenting queued calls to the agents.*

*The section **Advanced Options for Outbound lists** contains information about the various settings available to customize the way OB calls are presented to agents.*

SETTING ACTIVE TIMES

In the Active Times window you can specify the time period during which the Outbound calls for the campaign should be taken:

- Click on the **Active Times** tab in the Outbound List Properties window.
- Clicking ***Set Office Hours*** will make the calls active from Monday to Friday between 9.00am - 5.30pm.
- To select different time periods, move your mouse pointer to the required cell, click your left mouse button and drag the pointer from left to right, to the desired time slot.
- Click OK to confirm the active times for your Outbound list.



To ***deactivate selected time periods*** click your right mouse button and drag the pointer from left to right, to the desired time slot.

To deactivate all active time periods click the 'Clear' button.

Red Cells	Display the inactive times
Green Cells	Display the active times
Lavender Blue	Displays Time Periods allocated in the Recycling Designer

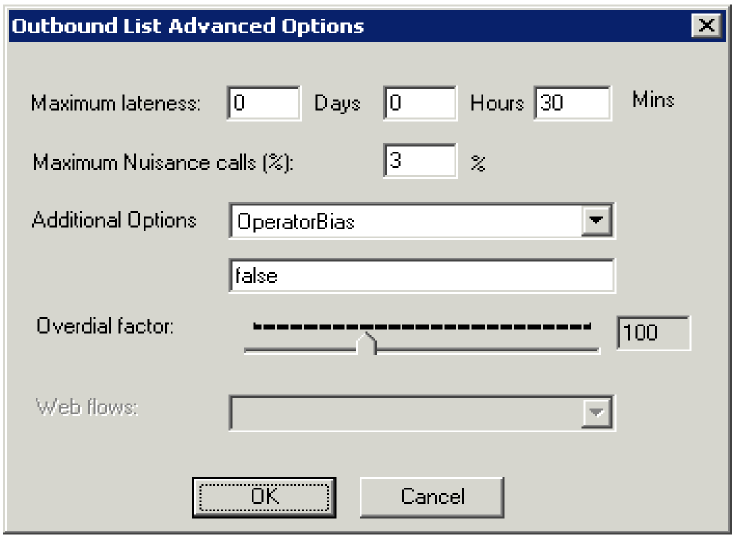
Default **Active Times** are set from 09:00 to 17:30. These settings can be changed in the Synthesys.inf file. Please ask your System Administrator, or contact Noetica for more information.

Time Periods *allocated in the Recycling Designer (shown as Lavender Blue) need to be cleared in the Recycling Designer, selecting the relevant Time Period and then clicking the 'Clear' button.*

ADVANED OUTBOUND LIST OPTIONS

In the Outbound List Properties dialog:

- Click the **Advanced** button, to open the *Outbound List Advanced Options* window.
- Set ***Maximum lateness*** to specify the time range in which rescheduled calls will be re-presented to the agents.
- For predictive Outbound lists you can also specify the maximum level of nuisance calls in %.



- ***Over dial factor***: Moving the slider (default setting 100%), the amount of over dial for predictive OB campaigns can be increased or decreased.

Please see next page for information about additional available Outbound property settings, available via the ***Additional Options*** drop down menu.

Additional Advanced Outbound List Options

Available Options	Use
Answer machine detection	True/ False. Turns on/ off Answer Machine Detection, providing the switch supports AMD.
AutoDialDelay	The number of seconds that the Auto Dial should be delayed, after the script pop.
Cli to present	The telephone number that will be shown on the customer phone when receiving the call.
CLIToPresentOnTransfer	Enter "**CustomerNumber"** as a string, to display the customer number the Switch has called
CallBackMaxDaysFromToday	The number of days, from selection (current date +N), for which call-backs can be rescheduled at run time. If agents select a later date, a message showing the latest possible date (YYYY/MM/DD) for selection is displayed.
CallBackActiveTimesOnly	True/ False. Enter True to specify that call-backs can only be rescheduled within an OB lists active time periods. If the day/time selected does not pass validation, agents will see the message 'you must reschedule this call during campaign active times'.
DedupeQueueOnTelephone	True/ False. If set to *True* a duplicate check will be carried out on the Queue table to ensure that when queuing new records, no duplicate telephone numbers will be added to an Outbound list. Instant call-backs will be queued as before.
Dial Preference	Enter ***Sleeping, Queued*, or *Both*** to determine if due sleeping or queued calls should be dialled first, or if a mixture of both should be presented to agents in order of their QueueID. ***Deactivate and re-activate*** the OB list to refresh the internal PD dialling list.
Dial Prefix	Enter the dial prefix used to dial out (e.g. 9).
Dial Order	Instruct the dialler in which order to retrieve queued items. Enter ***ReverseID*** if new Queue items should be presented to agents before old Queue items. Enter ID, to present older queued items before the newly queued calls. ***Deactivate and re-activate*** the OB list to refresh the internal PD dialling list.
Idle Timeout	Specify in seconds (i.e. 15), the time for the automatic screen pop of the next preview record. By default, no Idle Timeout is set and agents need to click the *Get Next Record* icon at run time to request the next preview call.
ListCleaningLinesToUse	The number of calls to be made concurrently by the dialler on a list cleaning campaign (ensuring the number is lower than the actual lines in use, depending on the lines\trunks available).
ListCleaningSwitchToUse	The switch name, if List Cleaning is used in a multi switch environment.
MaximumNextCallLateness	Specify in minutes the maximum lateness by which ***calls requested via the Call Diary*** (Call Next) should be presented to the agent, before they will be recycled as missed latest time.

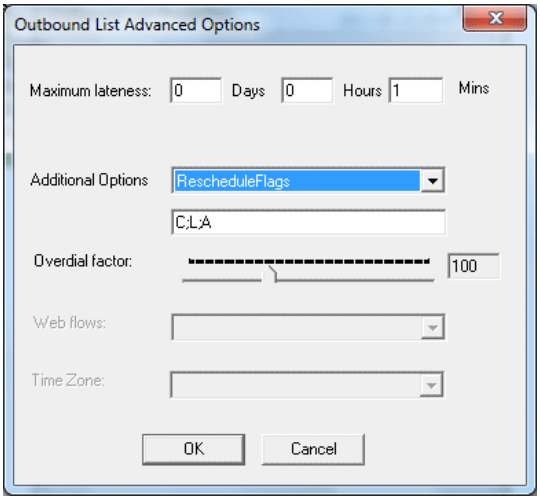
Available Options	Use
MinCallsBeforePredictive	Enter the minimum number of calls to be dialled for this campaign, before predictive dialling starts, max is 99.
No answer timeout	The number of seconds the Switch allows the call to ring, before dropping it as no answer.
Operator Bias	**True or False**. If true, rescheduled calls due will only be presented to the agent that scheduled the call, if false, rescheduled calls will go to any agent.
Priority Order	Enter ***None, Asc* or *Desc*** to specify the order in which to present priority calls. Entering ***Desc will present calls with higher priority settings first. Deactivate and re-activate*** the OB list to refresh the internal PD dialling list.
Rescheduled Flags	Enter ***C.L.A*** and/ or **P** to determine how the **Reschedule dialog** is presented to agents when aborting p*review* or p*redictive* outbound calls. Enter: **C**, to display all CRM numbers to the agent. **L**, to display the last number dialled to the agent. **A,** to allow the agent to enter a new telephone number, and **P,** to sleep, rather than reschedule the call, to enable predictive calling, rather than re-presenting the call in preview mode.
RescheduleSelectDefault	**True/ False**. If set to True, will pre-select a Default telephone number in the Reschedule abort dialog at run time, providing the Rescheduled flags OB property contains the 'L' option.
Use do not call list	**True/ False**. If True, allows Synthesys to check the telephone numbers in the **PHOENIX_DoNotCallList** table and to remove associated records from the Outbound call list.
UseMaxLatenessOnSleeping	**True/ False.** Set to True to set a latest re-try time for presenting sleeping calls at run time. If not presented, they will go to advanced recycling rules as missed latest call.
UseGlobalDNC	***True/ False.*** *Turned on by default for all outbound lists, to enable the PD to check entries in the Phoenix_DoNotCall table, to determine whether or not to make a call.*
DNCScope	*Used by the PD to decide which record to insert into Phoenix_DoNotCall in response to an abandoned/ nuisance call or answering machine (when using AMD).* *The default DNCScope is set to **Entity (CRM Prefix).** To override, you can enter **Global** to block the call Globally (Call Centre wide), or to block the call for a particular customer id, list, campaign or workspace (account), enter either **Customer**, OR **List**, OR **Campaign** OR **Workspace**.*

If you are using the Synthesys Switch, please take a look at the module document **Noetica Voice Platform** for a description of additional Outbound list properties.

Please also take a look at Reschedule Flags on the next page, and the ***Use Do Not Call List*** section.

Reschedule Flags

Reschedule Flags are set up in the ***Advanced*** properties dialog of an outbound list to determine how the *Reschedule* dialog is presented to agents when ***aborting*** *preview* or *predictive* outbound calls.



Setting up Reschedule Flags

Using the Reschedule flags ***C; L; A,*** separated by a semicolon, you can configure the Reschedule dialog:

Flag	Description
C	Display all CRM numbers to the agent
L	Display the last number dialled to the agent
A	Allow the agent to type the number, rather than limiting choice to the list formed above
P	Instead of rescheduling the call to the time selected, it will be 'slept' which will enable predictive calling, instead of a preview call

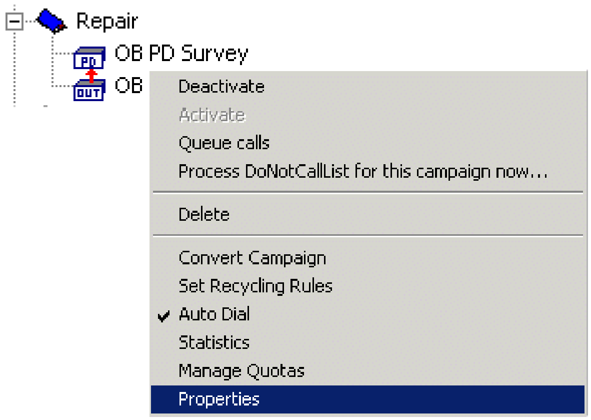
The order of C and L in the Advanced properties dialog determines the order in which the telephone numbers are displayed in the Reschedule dialog, i.e. if L is entered before C, the last number dialled is shown at the top of the list.

If you simply enter the flag L, agents in Take Calls will merely see the last number dialled, without being able to select or enter any numbers.

Changing Advanced Options & Active Times

To view or change any of the settings if and when required:

- Click your right mouse button on the respective Outbound list.
- Select ***Properties*** from the drop down list to open the *Outbound List Properties* window.



- Click the ***Active Times*** button to change active time settings in *Active Times* window.
- Click the ***Advanced*** button to change the settings in the *Outbound List Advanced Options* window, as required.

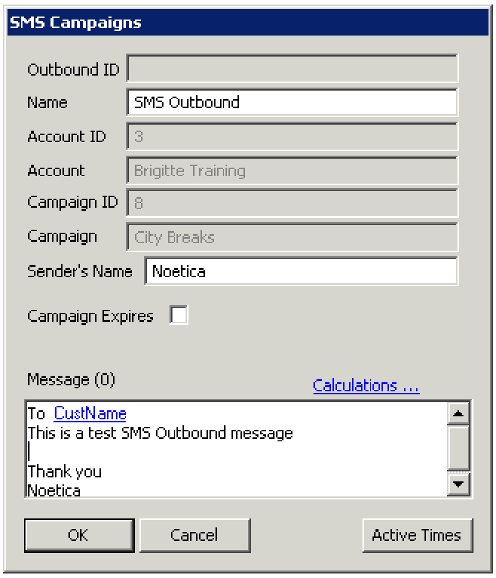
SETTING UP SMS OUTBOUND LISTS

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

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

When setting up an SMS Outbound list you must ensure that the CRM for this Outbound list includes a telephone field containing the customer's mobile number.

In the Outbound Manager, right click on your campaign and select ***SMS Outbound List*** the drop down menu.



Enter a name for your SMS Outbound list and the name of the Sender.

Enter the required SMS message, including a calculation with details captured in the CRM fields.

You can cut and paste word documents into the message page using ***Ctrl + V.*** The text must not exceed 150 characters, including the text used in your calculation, which is not registered in the Message () count.

Queuing Customers for an SMS Outbound List

All customers for your **SMS Outbound lists** need to be **queued on** the telephone field containing their **mobile number**.

Providing that the **SMS Outbound List** is **active**, an **SMS message will be sent** automatically to all customers in the active queue, as well as to those customers where the sleeping time has expired and action is now due.

*To set Active Times, please refer to the section **Setting Active Times**.*

To use SMS Outbound lists as part of a full contact strategy you can set up your recycling rules in the Recycling Designer.

SETTING UP EMAIL OUTBOUND LISTS

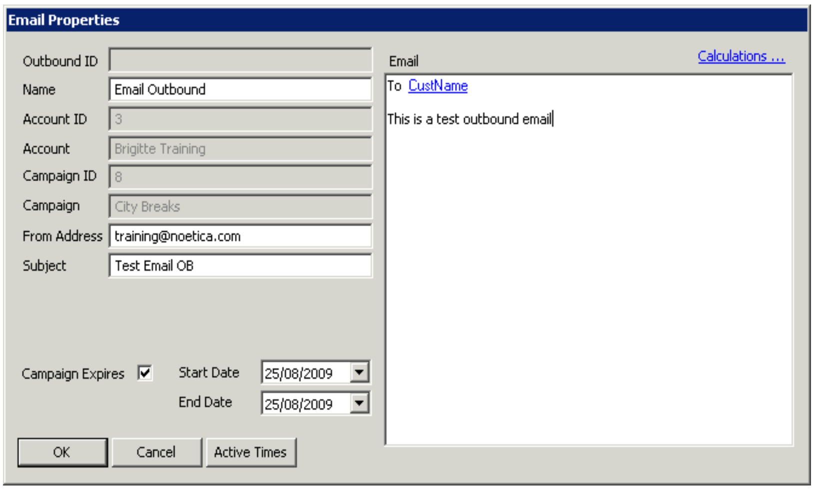
Email Outbound lists are used to send bulk Emails to customers. This functionality can be used as part of a full contact strategy. For example, customers could be called three times, then they could be sent an SMS and then an email.

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

When setting up an Email Outbound list you must ensure that the CRM for this O/B list includes an Email field containing the customer's email address.

In the **Outbound** manager, right click on your campaign and select ***Email Outbound List***.

Type the required text into the *Email* message page or paste a word document or html code into the message page using the keyboard command ***Ctrl + V.***



The email text can include calculations of details captured in the CRM fields.

Queuing Customers for an Email Outbound List

All customers for your **Email Outbound list** need to be **queued on** the **telephone field** containing their **email address**.

Providing that the **Email Outbound List** is **active**, an **email will be sent** automatically to all customers in the active queue, as well as to those customers where the sleeping time has expired and action is now due.

*To set Active Times, please refer to the section **Setting Active Times**.*

To use Email Outbound lists as part of a full contact strategy you can set up your recycling rules in the Recycling Designer. See next page for more information.

SMS and Email O/B & the Recycling Designer

To use SMS and Email Outbound lists as part of a full contact strategy, set up your recycling rules in the Recycling Designer.

- Use the ***Change Telephone*** icon, to **switch to** the telephone field containing either the **Mobile number** (for SMS) or **Email address** (for emails) and **end** the **branch** with a ***Change Campaign*** icon.

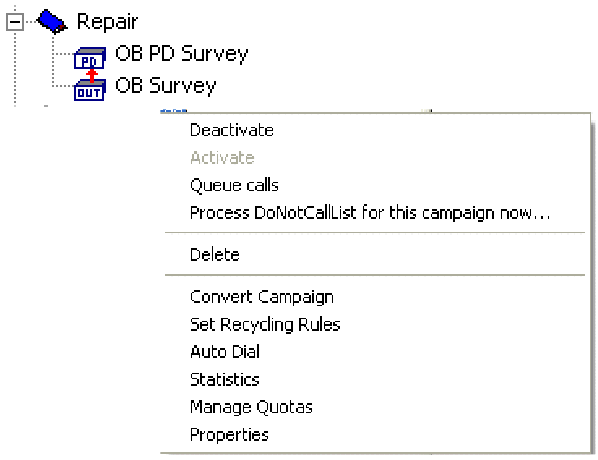
Depending on whether you want to send an SMS or an email, select the SMS or Email Outbound list that you have created earlier, to place the calls in the queue of the selected campaign.

- To change back from an SMS or Email Outbound list to a telephone call, **drop** a **new decision** based on ***Last call result*** and select the condition SMS or Email.
- **Use** the ***Change Telephone*** icon and select the number on which to contact the customer next.
- End the branch with a ***Change Campaign*** icon and select the Outbound list to which the calls should be queued.

For more information regarding the Recycling Designer please refer to the Section: ***Synthesys Call Recycling*****.**

OPTION MENU FOR OUTBOUND LISTS

When you right click on an Outbound list, the drop down menu displays a range of options available. The options will be described in more details in the following sections.



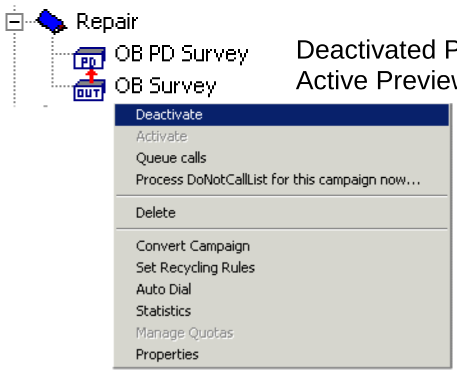
Option	***Uses To***
Activate / Deactivate	Activate the Outbound list to present calls from that list to the agents, deactivate if calls should not be presented.
Queue calls	Place customers to be called into the Outbound list.
Process DoNotCallList for this campaign now	Checks the telephone numbers in the PHOENIX_DoNotCallList table and removes associated records from the outbound list immediately. To process, the option UseDoNotCallList must also be set to True in the Outbound List Advanced Options dialog.
Delete	Delete a selected preview or predictive Outbound list.
Convert Campaign	Convert a preview Outbound list to a predictive Outbound list or vice versa.
Set Recycling Rules	Set up rules for recycling to determine when a call will be presented to the agents.
Auto Dial	Tick so that the telephone number will be dialled automatically.
Statistics	View statistical information of all queued calls.
Manage Quotas	Set quota targets which need to be met, before an Outbound list is deactivated automatically.
Properties	Access account and campaign information.

Activating and Deactivating Outbound Lists

You can make Outbound lists active or inactive at any time, as required.

- Right-click on the relevant Outbound list and from the drop down menu select either ***Activate*** or ***Deactivate.***

A red arrow displayed with the Outbound list icon shows that the Outbound list attached is active.

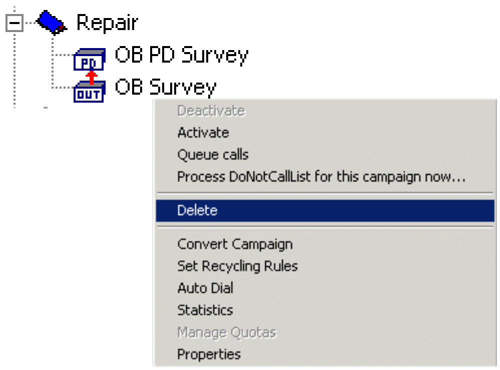


Deactivated Predictive Outbound list
Active Preview Outbound list

Deleting Outbound Lists

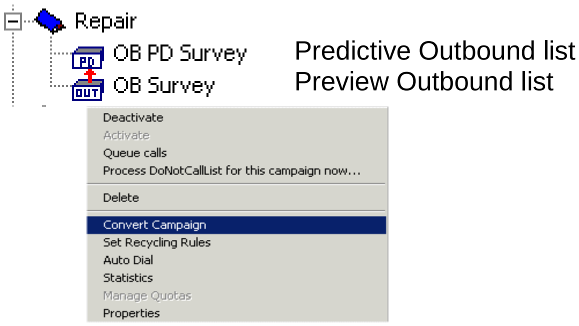
If there are calls queued for the Outbound list that you wish to delete, a message will be displayed informing you that with deleting the O/B list you will automatically also delete the queued items associated.

- To delete an Outbound list, select ***Delete*** from the drop down menu.
- Click 'Yes' to the message displayed, to delete the Outbound list and associated queued calls.

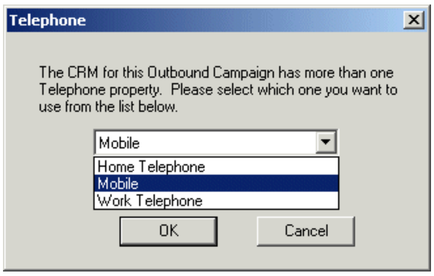


Converting Outbound Lists

You can convert a preview Outbound list to a predictive Outbound list or a predictive Outbound list to a preview Outbound list, using the **Convert** option of the drop down menu.



If the Preview O/B list that is to be changed to Predictive O/B list contains more than one telephone number, the type of number to be dialled by the predictive dialler has to be selected from the Telephone window displayed.



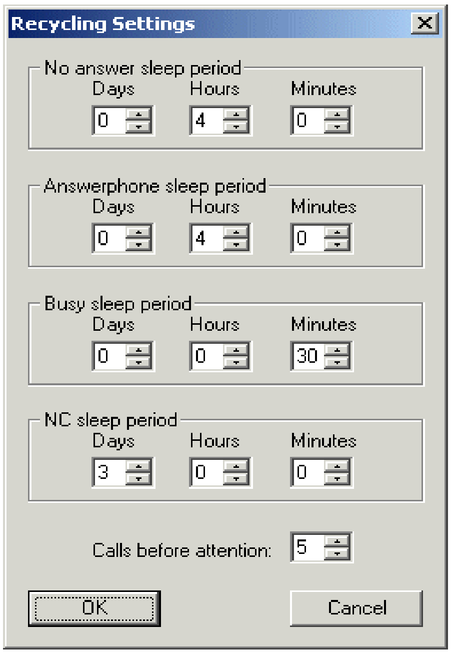
Auto Dial

Tick the ***Auto Dial*** option, to enable the Switch to dial the customer contact number automatically, rather than it being dialled manually by the agent.

Setting Recycling Rules

When an Outbound call is aborted in Take Calls selecting ‘Answerphone’, ‘Busy’ or ‘No Answer’ a zzZ sleeping icon will be displayed next to that call in the Outbound Manager.

To adjust the sleeping (recycling) periods for individual Outbound lists, right click on the relevant O/B list and select *Set Recycling Rule* from the drop down menu to display the Recycling Settings window.



Set Recycling Periods

To adjust the sleeping period, select the aborted type outcome and adjust the settings to the desired number of days, hours and minutes.
When the time is up the call will join the live queue, displaying a green traffic light.

Call before attention: allows you to specify how often a call will be placed back into the queue after an unsuccessful attempt to contact a customer, before it is brought to the attention of the call centre supervisor.

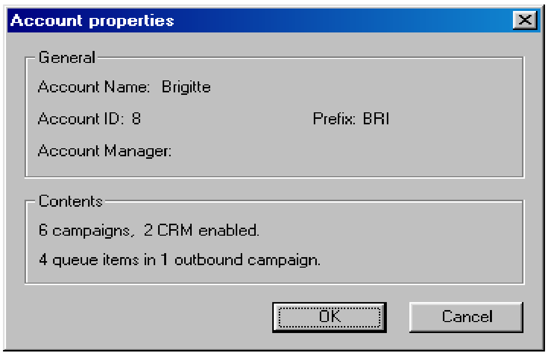
If you have a licence to use the Synthesys Call Recycling Designer, the Recycling Designer will open, instead of the Recycling Settings window.

For more information, see Section: Synthesys Call Recycling.

Viewing Account and Campaign Properties

To view account, campaign or Outbound list properties highlight and click the right mouse button on the account, campaign or Outbound list name.

Next select ***Properties*** to display the appropriate window. In our example we have opened the Account properties window.



Displayed is **General** information, such as the Account Name and ID and a **Contents** section with campaign information:

- There are 6 campaigns for the account.
- 2 campaigns have been assigned Customer Relationship Management.
- 1 Outbound list with 4 calls placed in the queue.

Use Do Not Call List

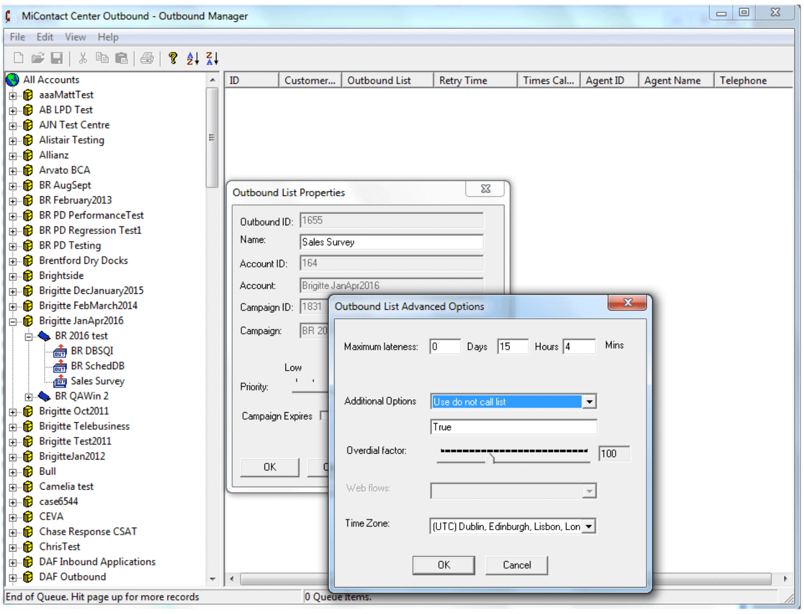
The **Do Not Call List** feature is used to remove people from individual Call lists in the Outbound Manager, should they have requested to be removed by calling, for example, the *Customer Preference Service* or an In-house *Complaints* department.

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

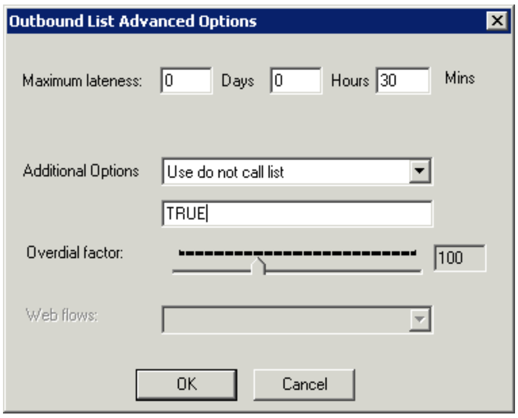
The Synthesys ***DoNotCallService*** will check this telephone field at 3am every morning and then automatically remove associated persons from the Outbound Call list.

Enabling the UseDoNotCallList feature

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



- Add the word **TRUE** and click OK, to enable the **UseDoNotCallList** feature.



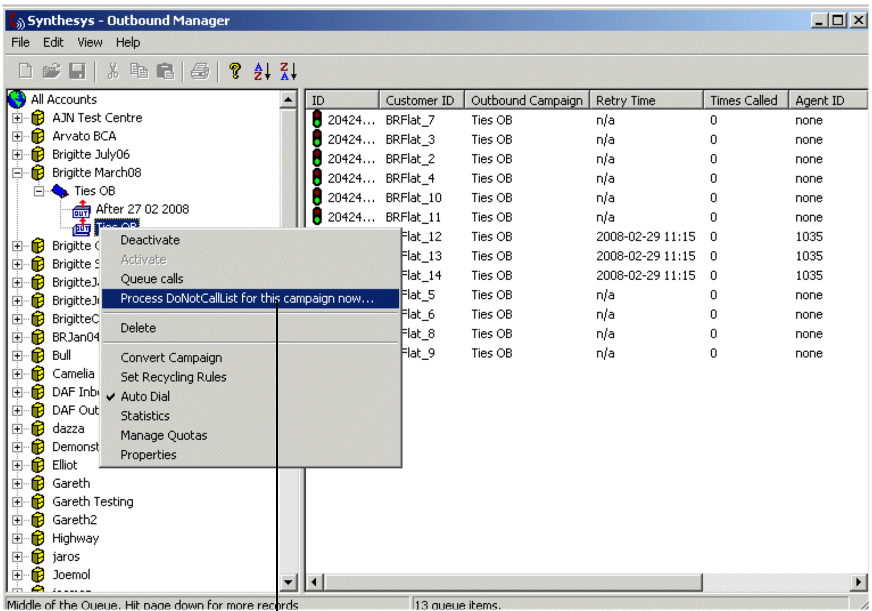
To disable the **UseDoNotCallList** feature, add the word **FALSE,** then click OK.

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

Process DoNotCallList for this Campaign now

To run the check process manually and to remove persons from the queue of a particular Outbound List immediately:

- Check that UseDoNotCallList in the Outbound List Advanced Options dialog is set to TRUE.
- Right click on the outbound list and select Process DoNotCallList for this Campaign now.



Selecting ***Process DoNotCallList for this Campaign*** will run the check process immediately.

OUTBOUND GROUPS

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

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

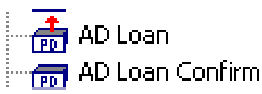
- an Outbound list
- an Outbound Group, itself containing one or more Outbound lists
- a combination of several of these

Each Outbound list within a group has a weighting, which determines the ratios of calls that are made from an Outbound group should it contain multiple Outbound list.

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

All Groups

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

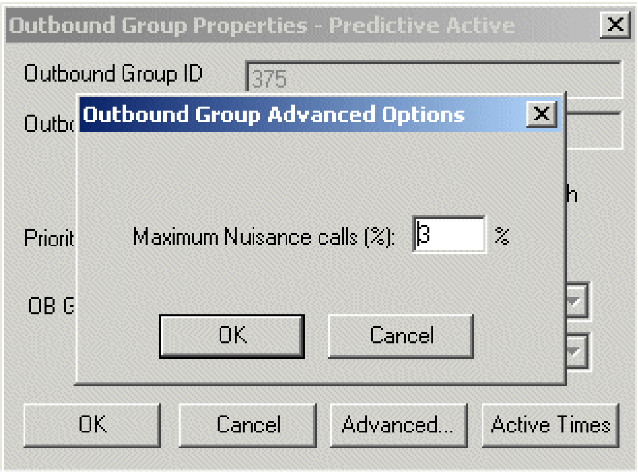
Colour	Displays
	Active Preview Group Inactive Preview Group
	Active Predictive Group Inactive Predictive Group

Under each Outbound Group all Outbound lists within that group are listed, displaying the name of the account, campaign and Outbound list.

Adding a Predictive Outbound Group

To add a predictive Outbound Group:

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



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

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

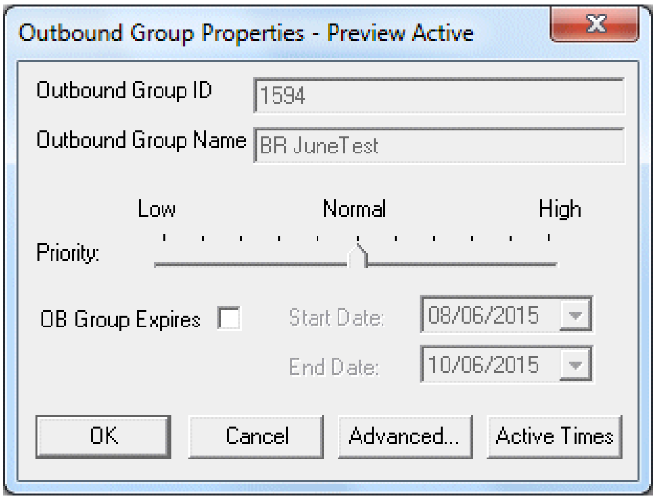
Advanced Options for Predictive OB Groups

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

Adding a Preview Outbound Group

To add a preview Outbound Group:

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



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

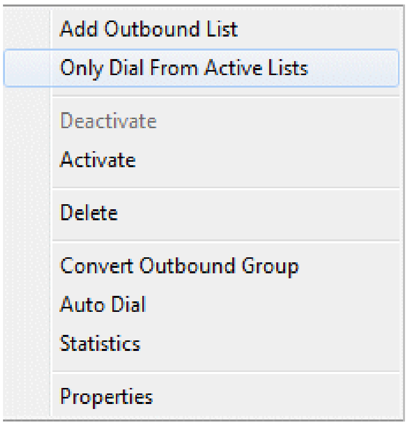
Set the Active times for the group via the *Active Times* button.

Advanced Options for Preview OB Groups

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

Outbound Group Context Menu

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



The following options are available:

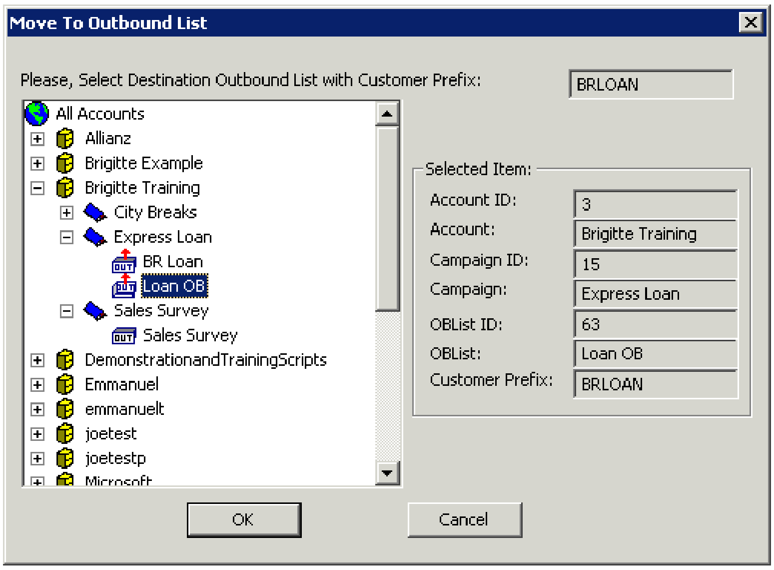
Option	***Used To***
Add Outbound List	Add an existing Outbound list to your Outbound group.
Only Dial From Active Lists	Uses campaign level values, rather than group level values. If the option is ticked, records will only be dialled from active/ non expired outbound lists.
Deactivate	Deactivate an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

Adding Outbound Lists to Outbound Groups

To add an Outbound list to your group:

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

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

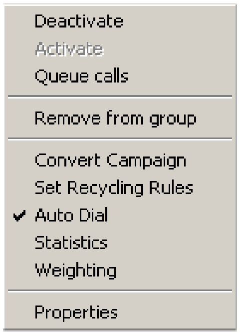


- Locate and select the desired Outbound list.
- Click OK to add the Outbound list to the group.

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

Context Menu of Outbound lists within Group

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



The following options are available:

Select/ Tick	Used to
Deactivate Activate	Deactivate an Outbound list, if it is ‘Active’. Activate the Outbound list, if it is ‘Inactive’.
Queue calls	Place customers to be called into the queue of the O/B call list in the Outbound Manager.
Remove from group	Remove an Outbound list from an Outbound Group.
Convert Campaign	Convert preview Outbound lists to predictive Outbound lists or vice versa
Set Recycling Rules	Set up rules for recycling, to determine when a call will be presented to the Agents.
Auto Dial	Tick/ untick the auto dial feature, to automatically dial the telephone number of a Preview O/B call, without agents having to click the ‘Dial’ icon of the CTI toolbar.
Statistics	View statistical information of queued calls.
Weighting	Invoke the weighting dialog, where you can set the ratio of calls the Dialler should present from selected Outbound call lists.
Properties	Access Account & Campaign information.

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

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

Remove from Group

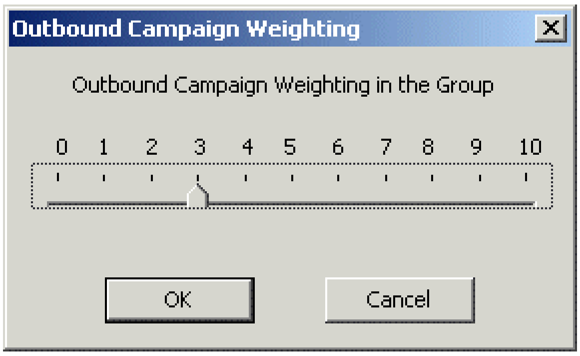
The ***Remove from group*** option removes an Outbound list from the group, but does not delete the Outbound list.

Outbound List Weighting

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

To open the ***Weighting*** dialog, right click on your Outbound list within the group. The values go from 1 to 10, with the default value for weighting set to 3. You then can, for example, set another campaign to have three times as many, or x times fewer calls, as the one set to the default.

To adjust the setting, use the slider, to determine, how many calls of this Outbound list will be allocated.

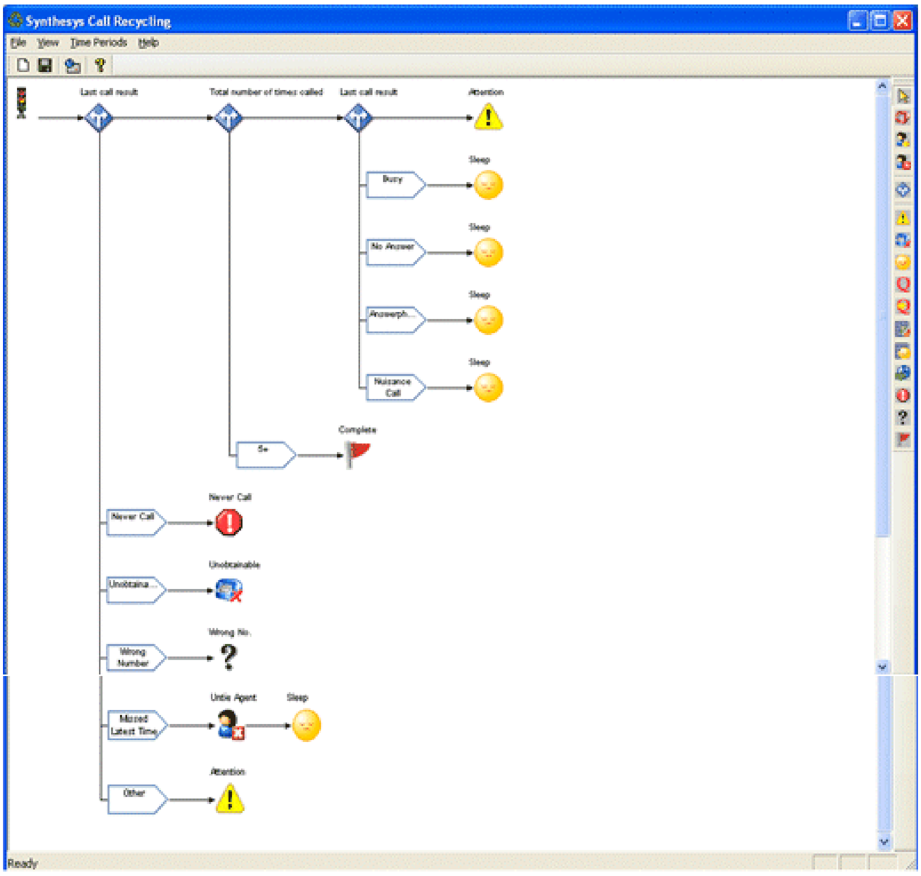


In the Team Manager, you can set up different teams and assign specific Outbound groups and call lists to the individual agents.

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

For agents to be able to take calls on an Outbound Group, the Outbound group has to be activated and Active Times must have been set for the Outbound group. If the option 'Use Campaign Properties' is ticked, the Outbound lists assigned to the group also have to be activated and set to active times.

Synthesys Call Recycling



SYNTHESYS CALL RECYCLING

INTRODUCTION

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

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

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

Launching the Call Recycler

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

Active Times

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

Multiple Telephone Numbers

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

THE RECYCLING DESIGNER

To launch the Synthesys Call Recycling Designer

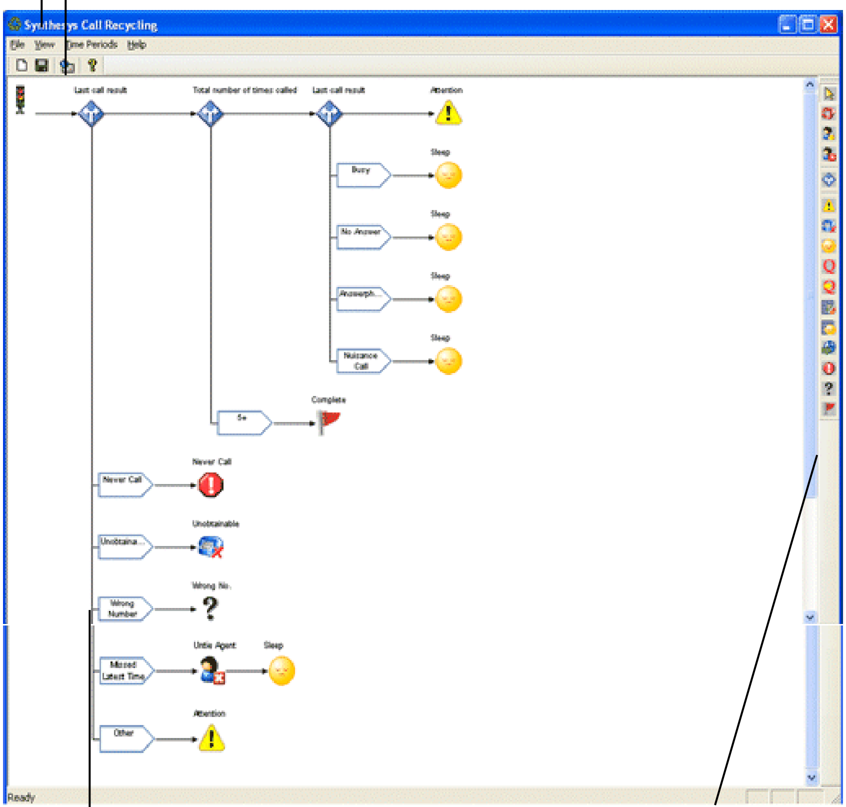
- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.

- Select the **Applications** tab and in the Launch Applications screen select ***Outbound.***

- Right click on your Outbound list and select **Set Recycling Rules** from the drop down menu.

The Synthesys Call Recycling Designer has a default Recycling script attached. Users can edit the recycling rules of the default Flow to meet particular requirements or design a totally new Recycling script.

Menu Bar
Standard Toolbar



Design Area
Recycling Toolbar

The following sections describe each of the elements indicated above.

The Menu Bar

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

File Pull Down Menu

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

View Pull Down Menu

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

Time Period Pull Down Menu

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

Help Pull Down Menu

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

THE TOOLBARS

The Synthesys Call Recycling Designer has two toolbars.

- The Standard Toolbar
- The Recycling Toolbar

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

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

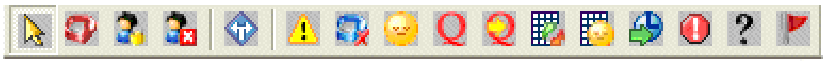
The Standard Toolbar

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

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

The Recycling Toolbar

The Recycling Toolbar lets you build Recycling Rules quickly and easily.



 ***Activate*** the selection tool.

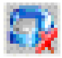
 Change the Telephone Number to call.

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

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

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

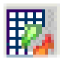
 Change state to ***Attention***.

 Change state to ***Unobtainable***.

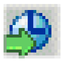
 ***Sleep the call***, for example, sleep a ‘busy’ call for ten minutes

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

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

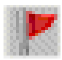
 ***Change Campaign***, will queue the call to a new campaign and marks the call as ‘Finish’ in the original campaign.

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

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

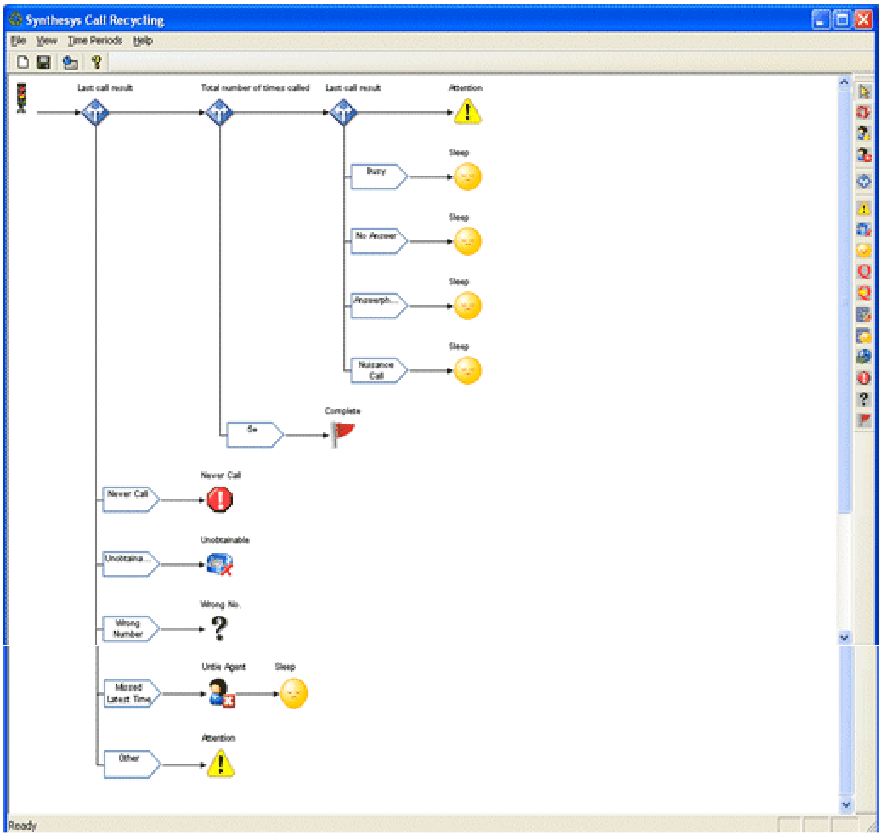
 ***Never Call***, shows a list of all clients that do not wish to be contacted again.

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

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

DEFAULT RECYCLING RULES

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



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

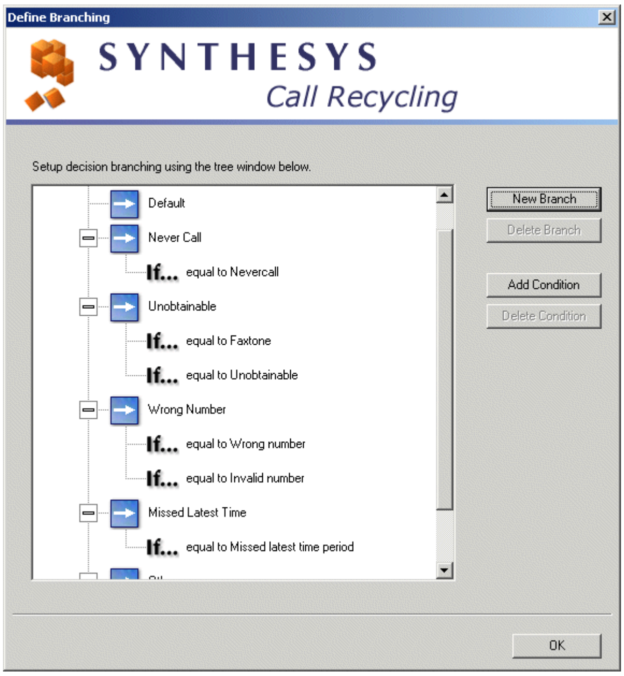
Decisions and Branches in the Default Script

'Result' Decisions 1& 2

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

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

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



Result Branch 1

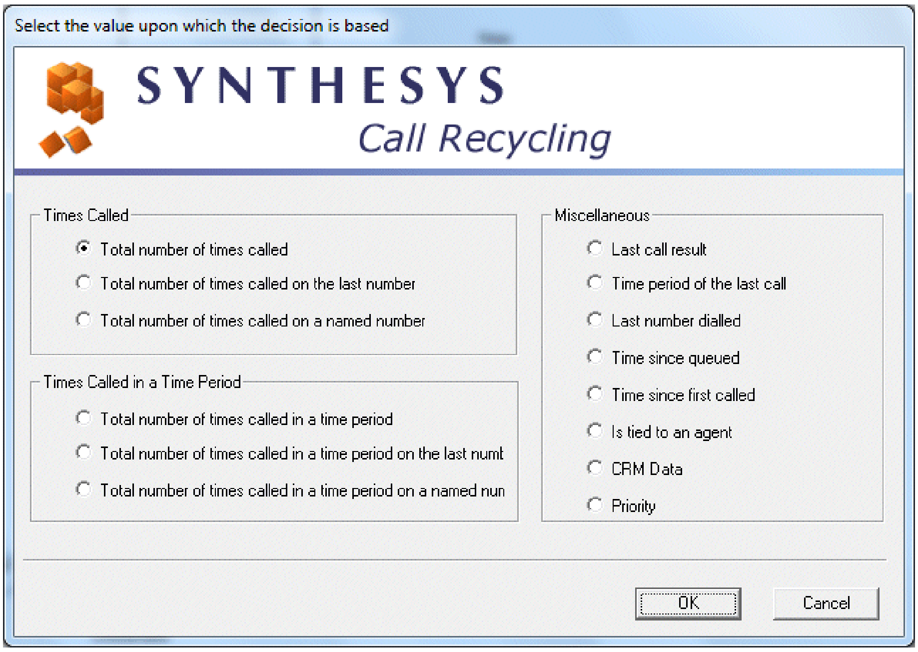
For each of the required Outcomes we then have placed the relevant Conclusion icon at the end of the branch.

‘Times Called’ Decision and Branch

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

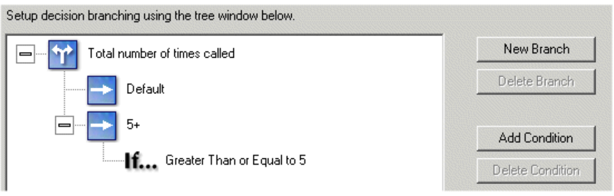
We have picked up a ‘New Decision’  and placed it after the traffic lights, to display the ‘Select the value…’ window.

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



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

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

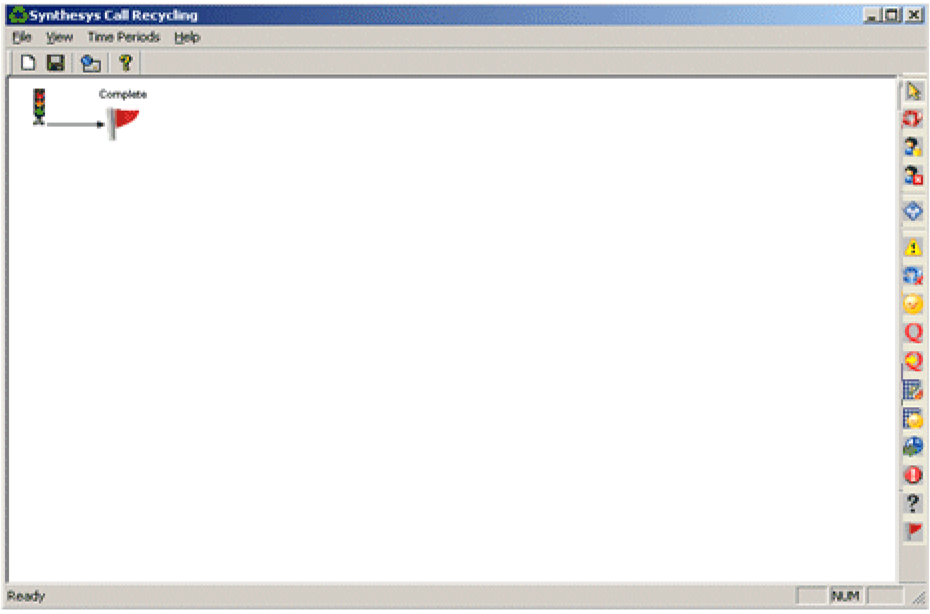


We then dropped the ‘Strategy Complete’  icon at the end of the branch.

DESIGNING A NEW RECYCLING SCRIPT

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

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



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

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

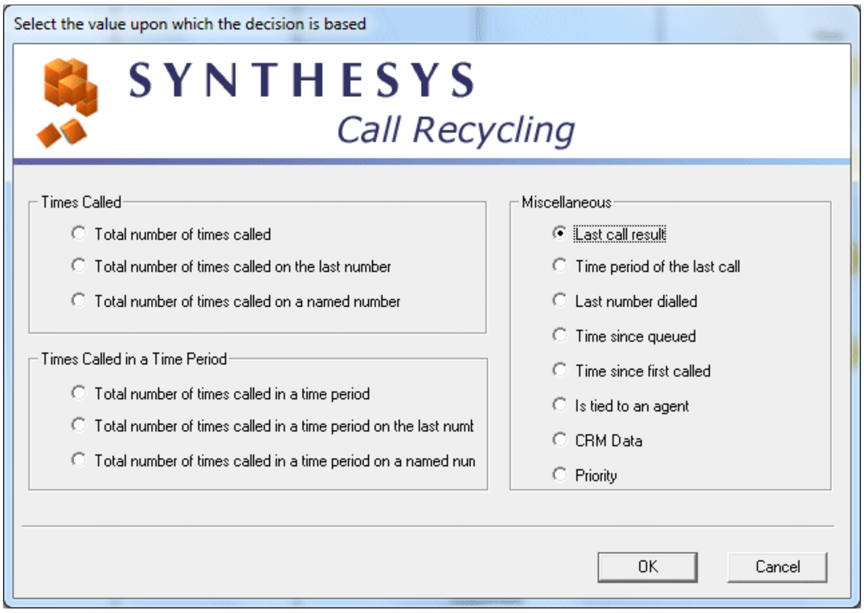
NOTE: If you have multiple telephone numbers in your CRM, ensure that you select the correct number as the first telephone number on which to contact the customer, when queuing calls. In our Scenario, this should be the 'Work' number.

Result Branch ‘Aborted Types’

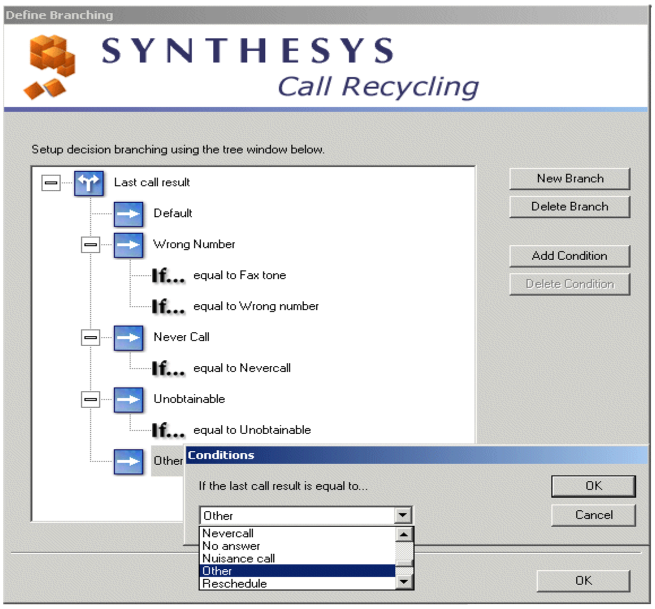
To create a recycling Flow according to the specified requirements, we firstly need to create a New Decision and associated branches for the Aborted Types.

- Pick up a ‘**New Decision’**  and drop it after the traffic lights to display the ‘Select the value…’ window.

From the options available, select ‘**Last Call Result’** and click **OK**.



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



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

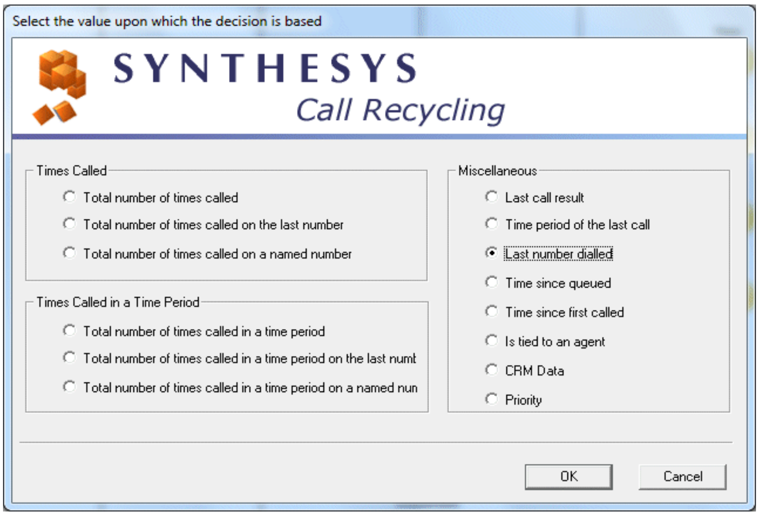
Click **OK** in the ‘*Define Branching’* window to return to the Call Recycling Screen.

New Decision 'Last Number Dialled'

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

- Pick up a '**New Decision**'  and drop on the Default branch, after the 'Result' Decision point.

- From the options available in the 'Select the value…' window, select '**Last Number dialled'** and click **OK**.



Select 'Last Number dialled'.

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

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

Work Number Branch

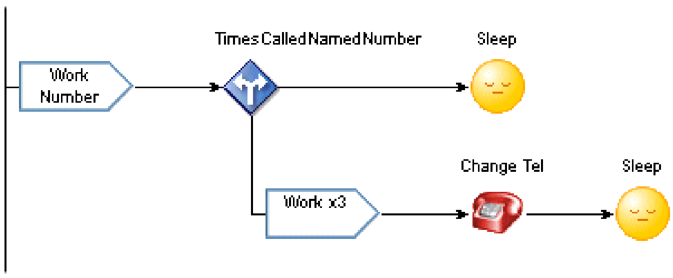
We now need to create the recycling rules for each of the selected telephone numbers. Pick up a ‘**New Decision’**  and drop it on the Work Number branch.

From the options available in the ‘Select the value…’ window

- select ‘Number of times called on a named number’ and click OK.

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

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

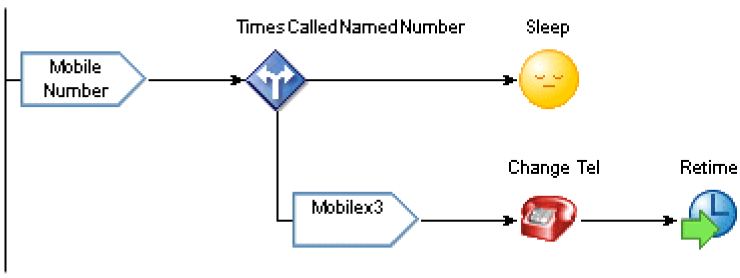


Now create the recycling rules for the Mobile and Home Numbers respectively.

Mobile Number Branch

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

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

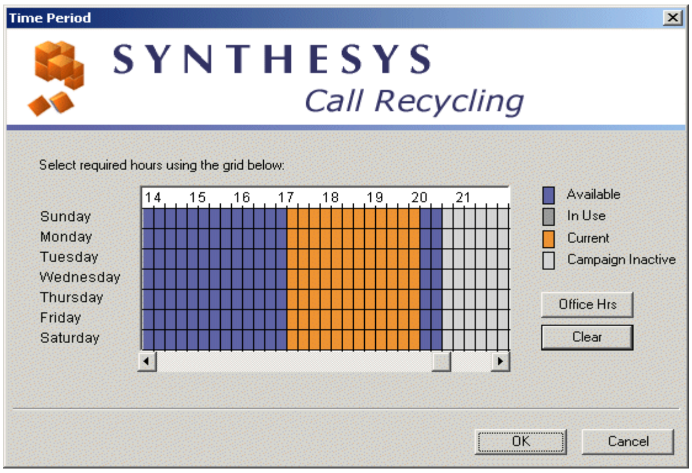


Selecting Time Periods

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

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

In the **grid** of the ***Time Period*** window, set the required time periods.
NOTE: The only available Time Periods that can be selected here, are those that have been set to 'Active' in the 'Active Times' window when setting up your Outbound list.



The Current active times are displayed in orange colour.

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

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

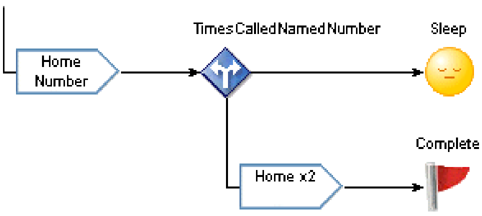
Lavender Blue	*Available time periods that can be selected*
Dark Grey	*Time periods already In Use that can't be selected*
Orange	*Current active times period, selected for the currently specified time period*
Light Grey	*The Outbound list is currently 'Inactive' or no active times have been enabled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

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

Home Number Branch

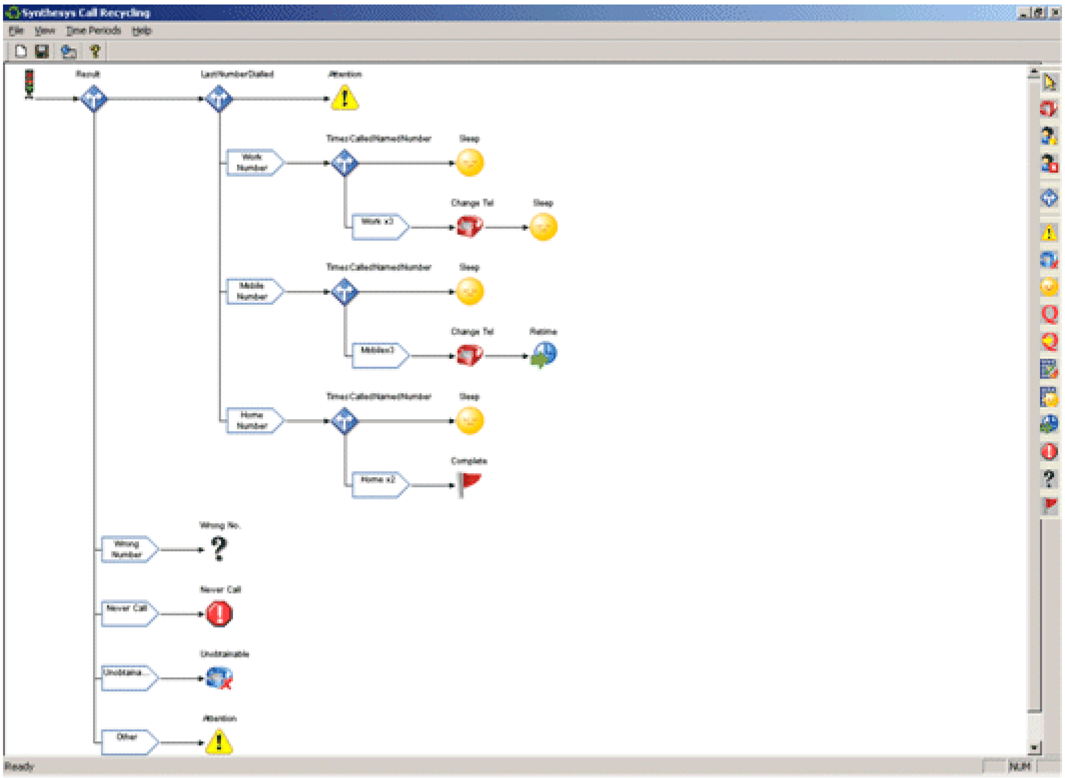
On the Home Number branch, create a 'Home x2' branch, again based on 'Number of times called on a named number', with the Condition 'Greater than or Equal to 2'.

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



Completed Recycling Script

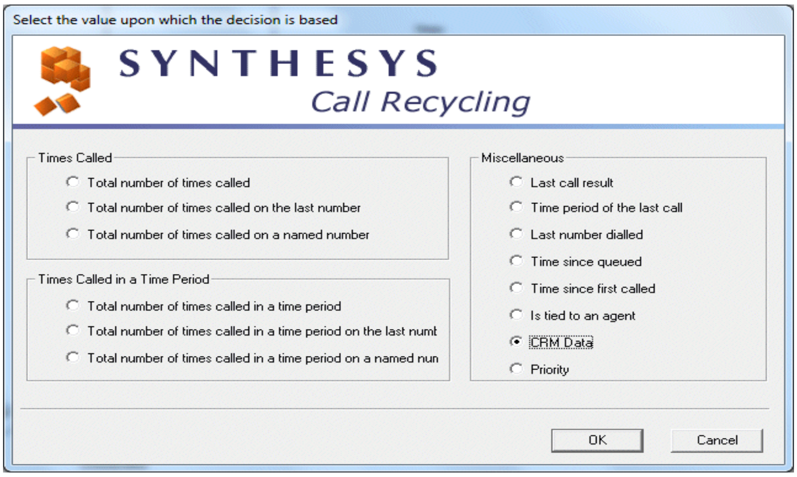
Your completed Recycle Flow should look as follows:



Decisions based on CRM Data

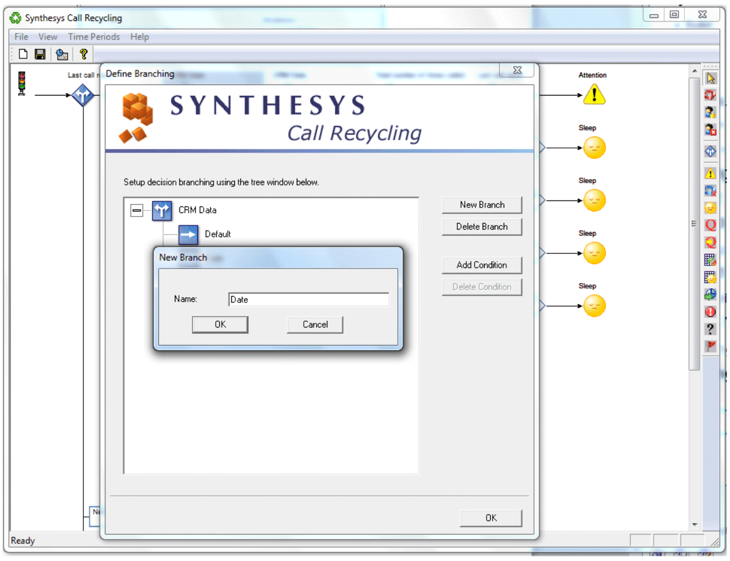
Using the ***CRM Data*** option, users can recycle aborted calls based on information contained within the CRM fields of a campaign.

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



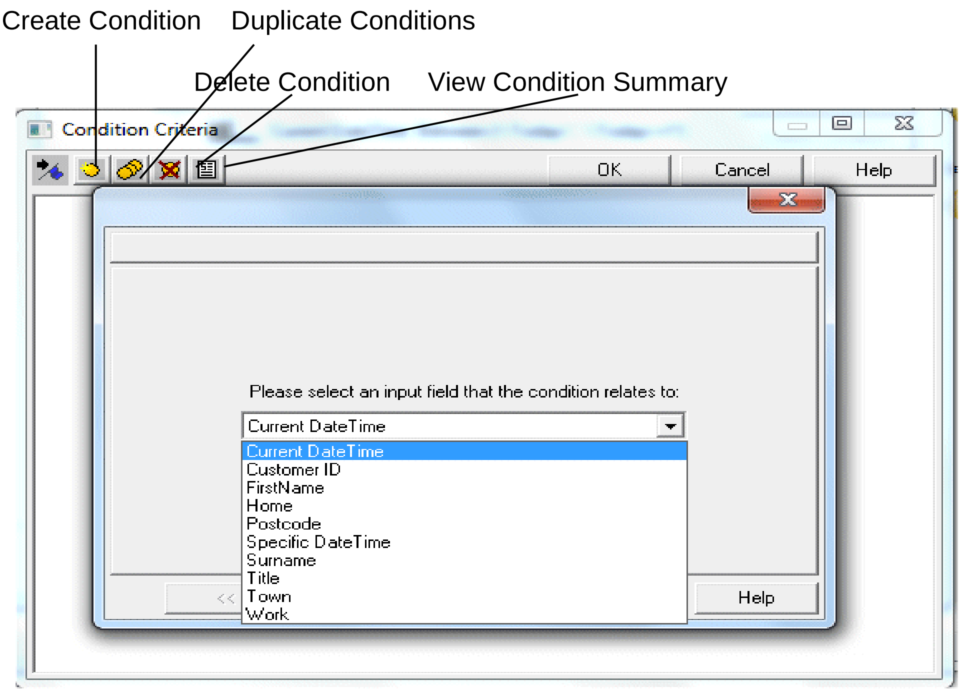
- Double click on the Decision point and in the ***Define Branching*** dialog, click **New Branch.** Add a new branch, entering a logical branch name.

In our example we have created a branch called Date.



Next, click the **Add Condition** button, to open the *Condition Criteria* dialog.
To create a condition based on a CRM field

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



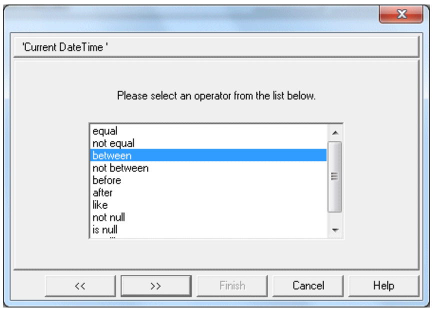
Create Condition. Click this icon, to create a new condition. To e**dit** existing conditions, double-click on the relevant condition disc.

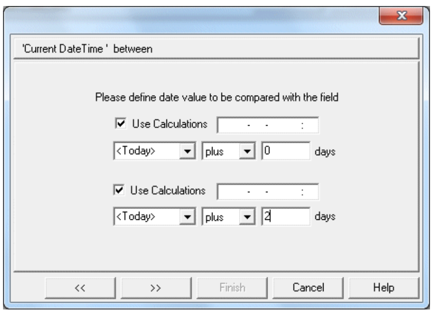
Duplicate condition. Click this icon, to duplicate an existing condition.

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

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

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

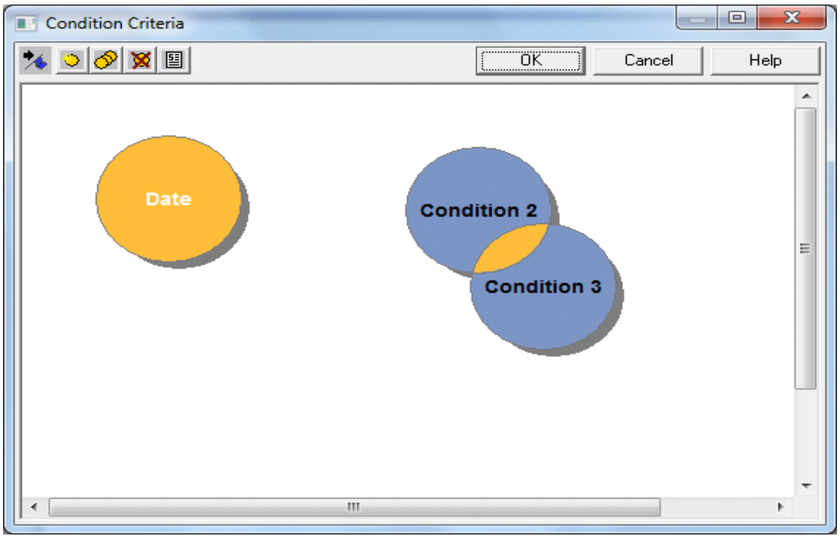




In the next page of the wizard ***add a name for our condition*** and click ***Finish.***

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

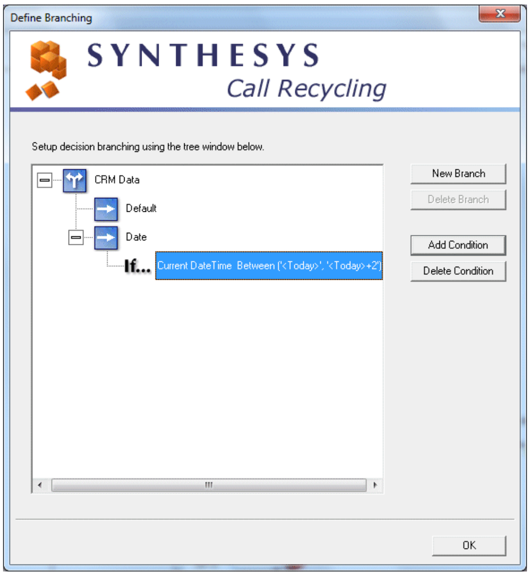
- Further conditions can be defined, clicking the **Create Condition** icon.
- To **edit** existing **conditions**, double-click on the relevant condition disc.



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

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

- Click **OK** to close the *Condition Criteria* dialog and to display the condition in the Define Branching dialog.

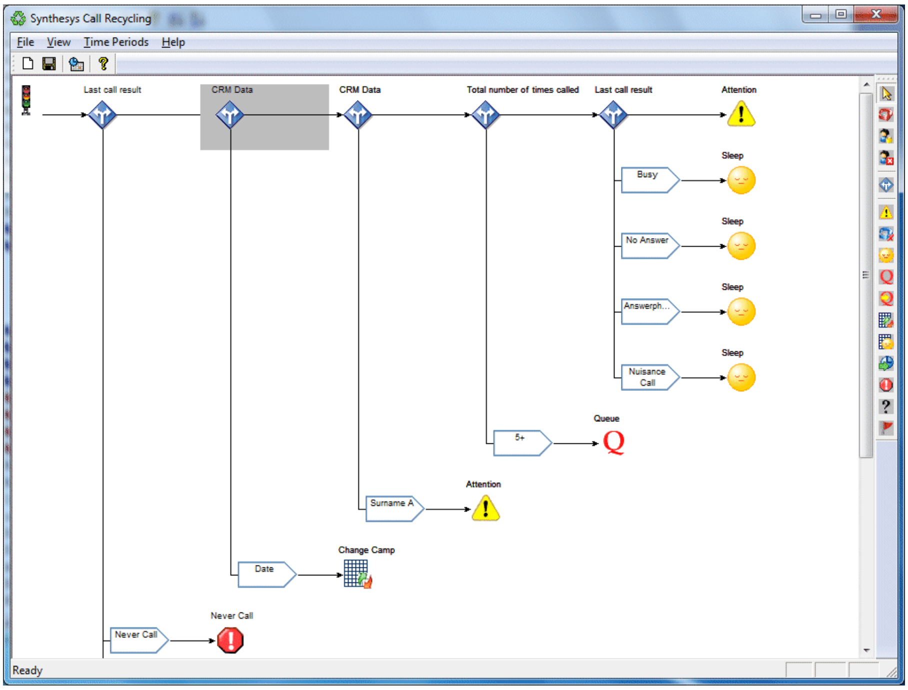


To add the CRM Data branch to our recycling script

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

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

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



Decisions based on Priority of OB List

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

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

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

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

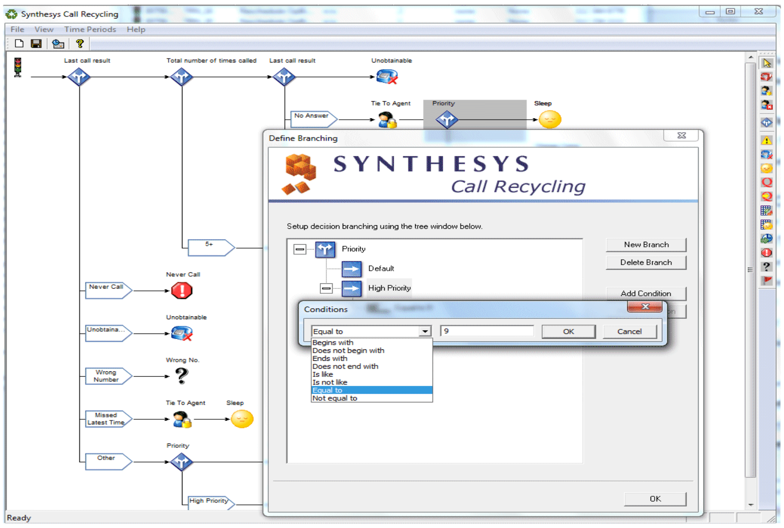
- Right click on your Outbound list and select **Set Recycling Rules** to open the Recycling Designer.
- Pick up a **New Decision** and drop it into your recycling script to display the '*Select the value upon which the decision is based…*' window.
- From the *Miscellaneous* options available, select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

Please see next page for more information.

To create the condition based on **Priority**

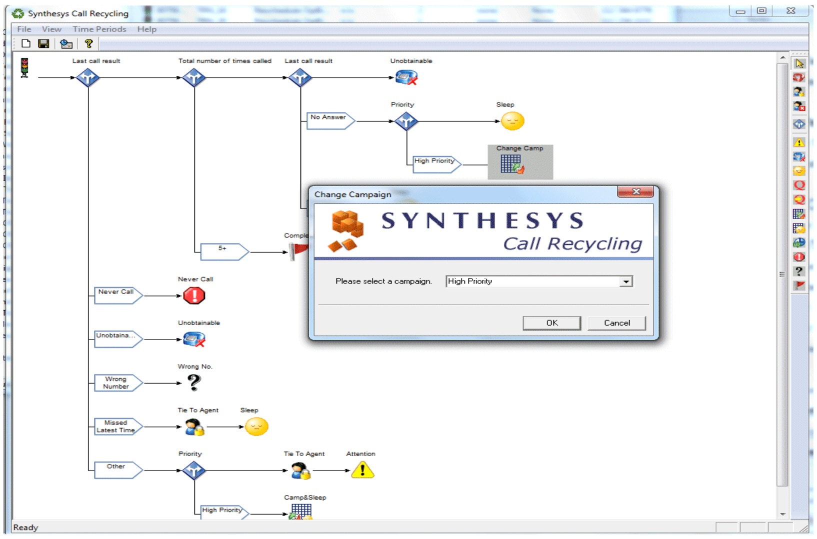
- Double click on the *Decision* point and in the ***Define Branching*** dialog, click **New Branch.** Add a new branch, entering a logical branch name, i.e. '*High Priority*'.
- Next, click the **Add Condition** button to open the *Condition Criteria* dialog and define your condition, as required.

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



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

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



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

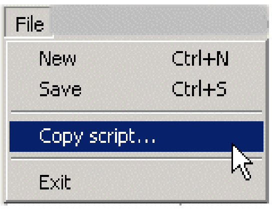
COPYING A RECYCLING SCRIPT

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

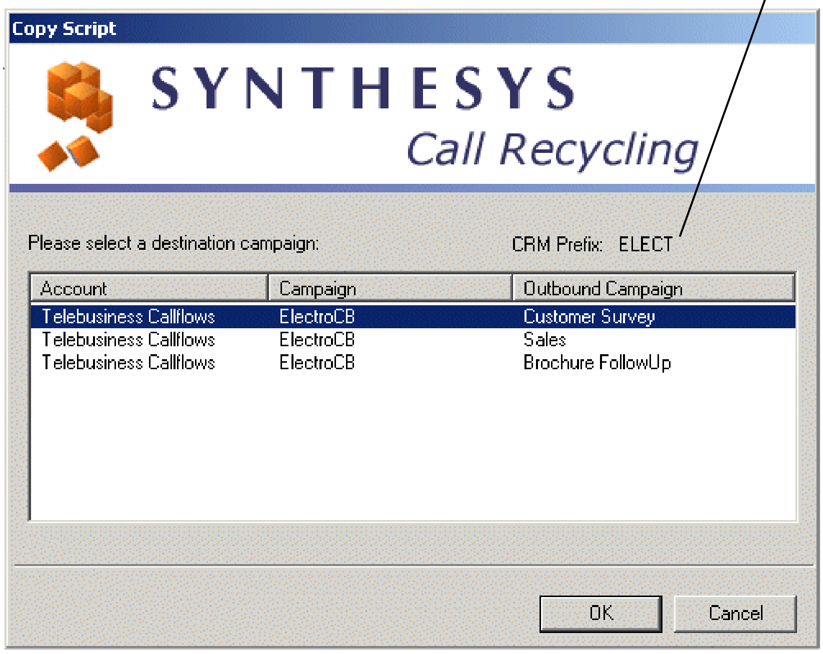
*Be aware however that **when using the Retime option** to set specific time periods for callbacks **you must ensure** that the **Active Times** enabled **in your destination outbound list match** the time periods specified in the Recycling rules that you wish to copy.*

In the Recycling Designer:

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



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



- Select the Destination campaign and click OK.

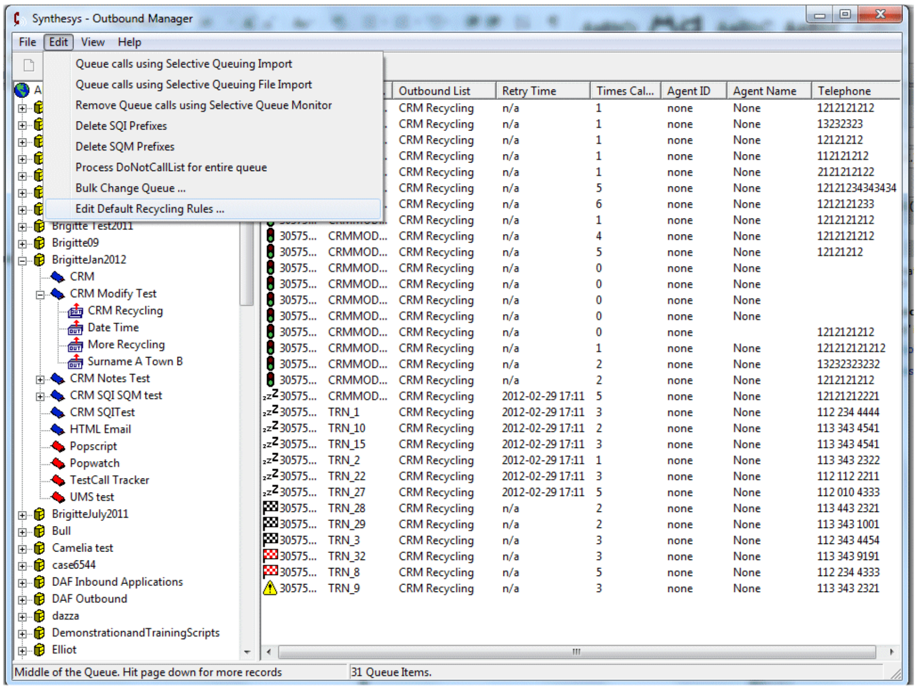
The current recycling script has now been copied to the selected outbound list.

CREATING A RECYCLING RULES TEMPLATE

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

To create the template:

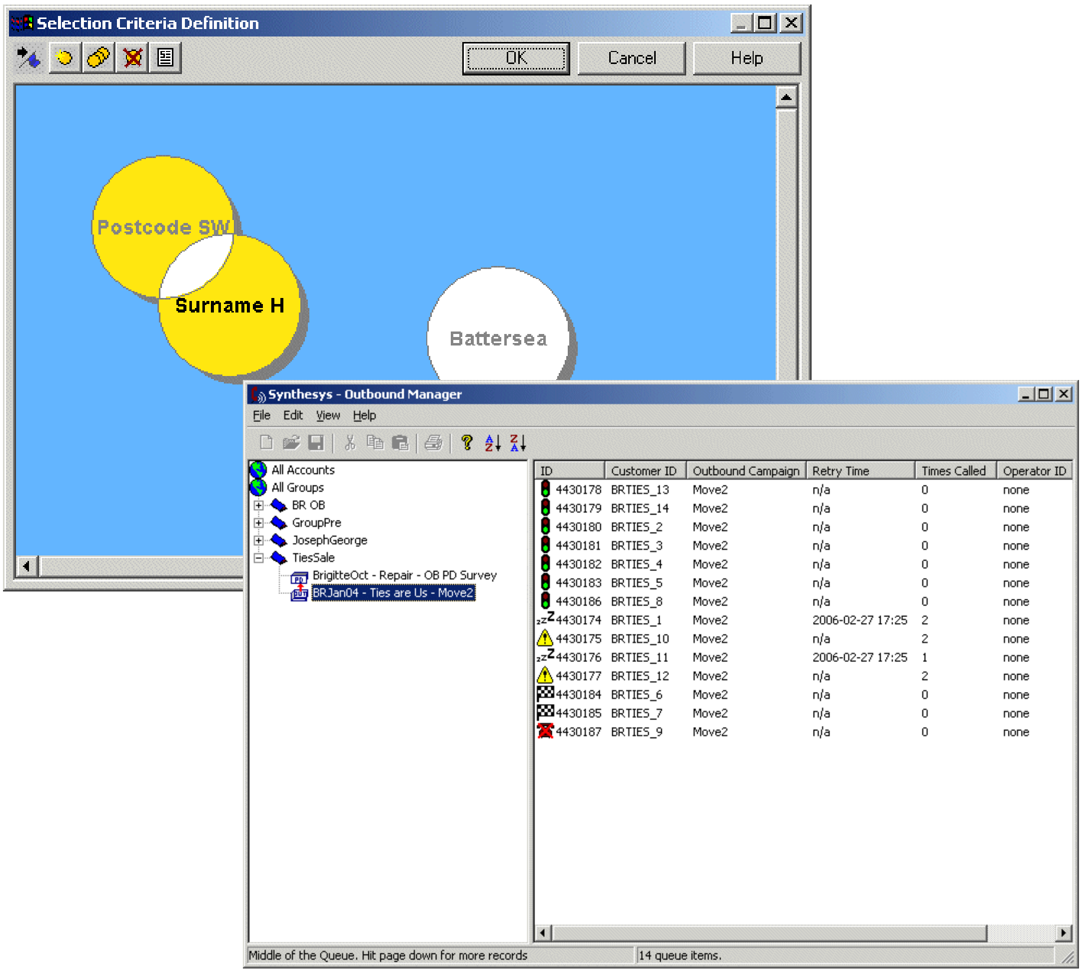
- Go to the ***Edit*** menu in the Outbound Manager and select ***Edit Default Recycling Rules.***



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

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

Queuing Calls



QUEUING CALLS

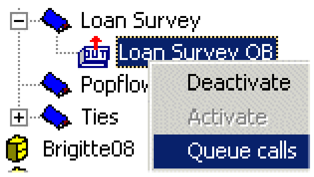
To place customers to be called into an Outbound list:

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.

- Select the **Applications** tab and in the Launch Applications screen select ***Outbound.***

If you wish to queue calls, without the need to set and edit a range of selected queuing conditions, you can

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



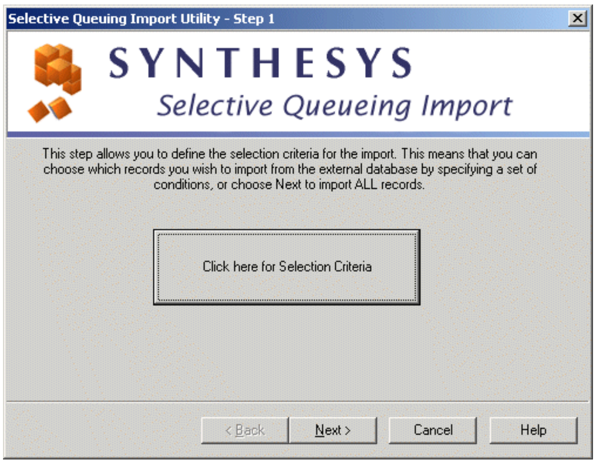
A **Queue *Wizard*** will open, to guide you through the required actions of creating you call list.

To queue selected customers based on relatively complex conditions, we recommended that you use the Queue calls using Selective Queuing Import option via the Edit menu.

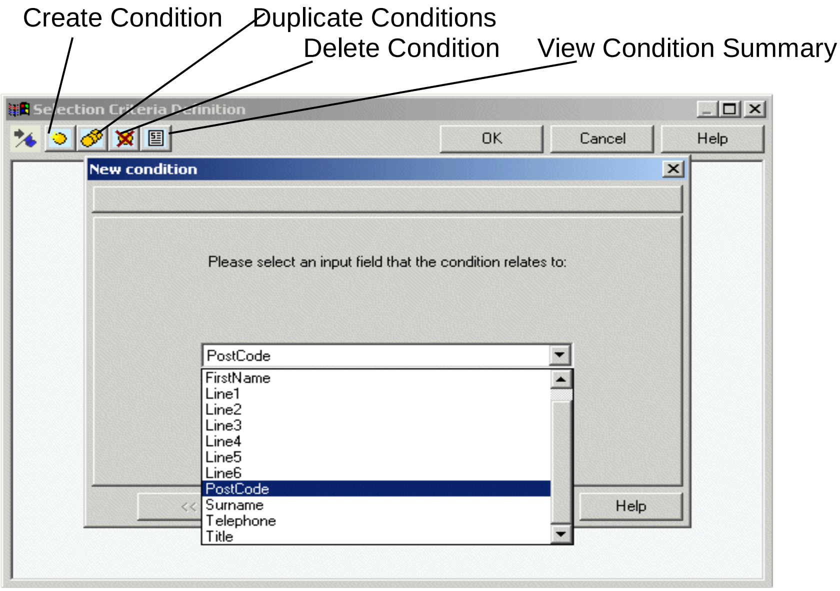
Here the SQI wizard will prompt you early on to enter a logical prefix for the SQI operation. Entering a logical prefix will make it easier to access and edit the existing conditions at a later stage

Setting Selection Criteria for Queuing

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



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



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

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

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

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

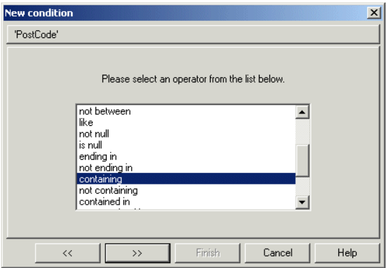
To create a new condition:

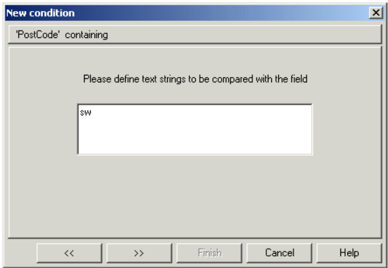
- Click the **Create Condition**  icon.

- In the ***New Condition*** window select the property to define your search using any fields available in your CRM (for example the ***Postcode*** field.

- Click the 

button to move to the next screen of the wizard to select the required operator, i.e. **containing** and then type **SW** to specify that you wish **to queue all customers in the SW area**.



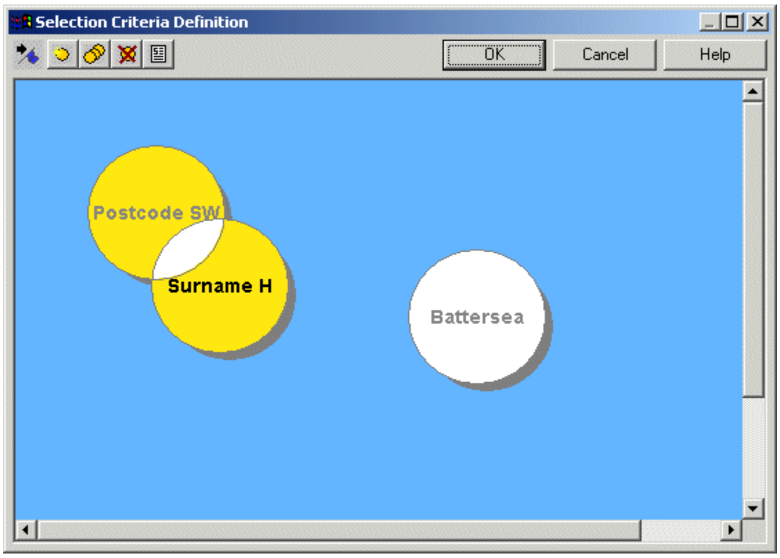


We are then prompted to enter a name for our condition, i.e. Postcode **SW**.

When the condition has been defined, the name entered next will appear on the free, floating disc on the canvas.

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

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



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

Each condition disc can be manipulated, clicking and dragging it around the canvas. Any discs that ***overlap*** with one or more other discs will ***imply a Boolean 'AND'*** to operate between the conditions. For example, customers are to be queued if:

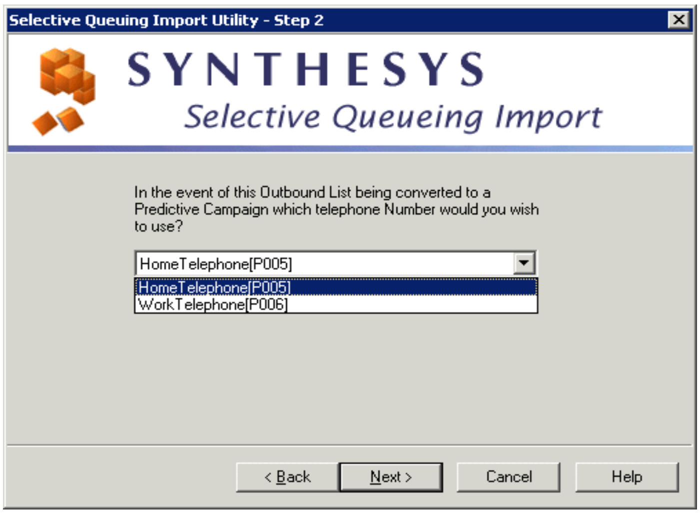
(Postcode SW **AND** Surname begins with H) **OR** (Borough = Battersea)

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

Selecting the Telephone Number

In the window now displayed:

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

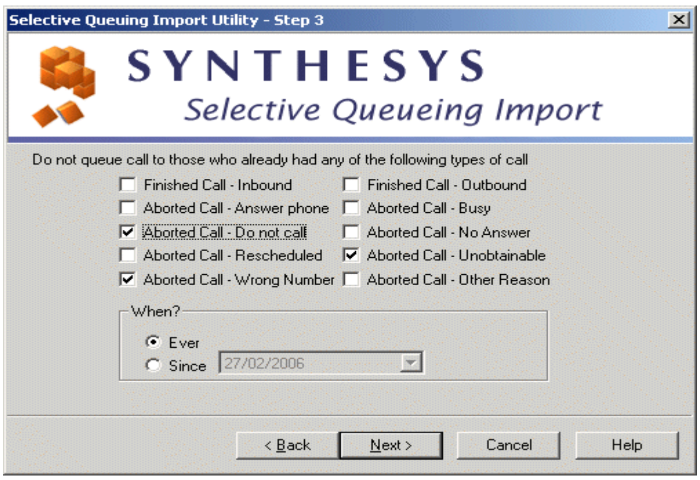


Queuing Customer Records

This part is concerned with the parameters governing the queuing of Outbound calls. Here you can define restrictions to be imposed when queuing calls, based on previous contact with a specific customer.

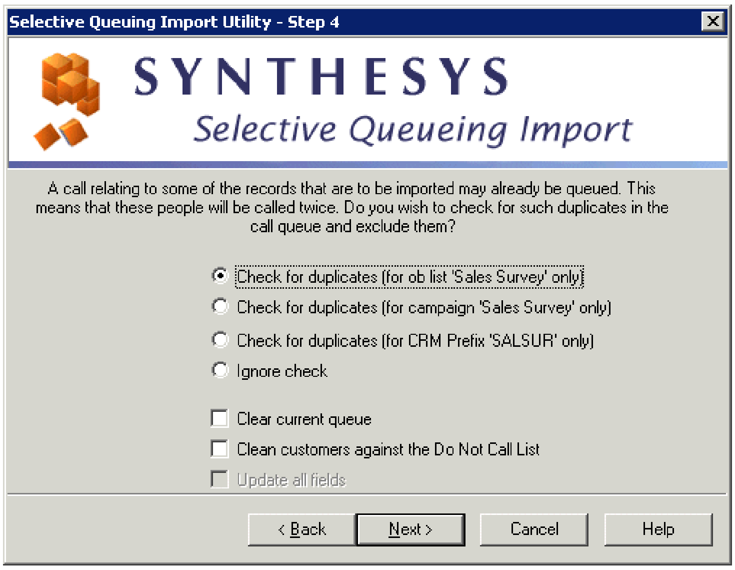
To ***exclude*** customers from the call queue:

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



To check for possible duplicates in the queuing process:

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



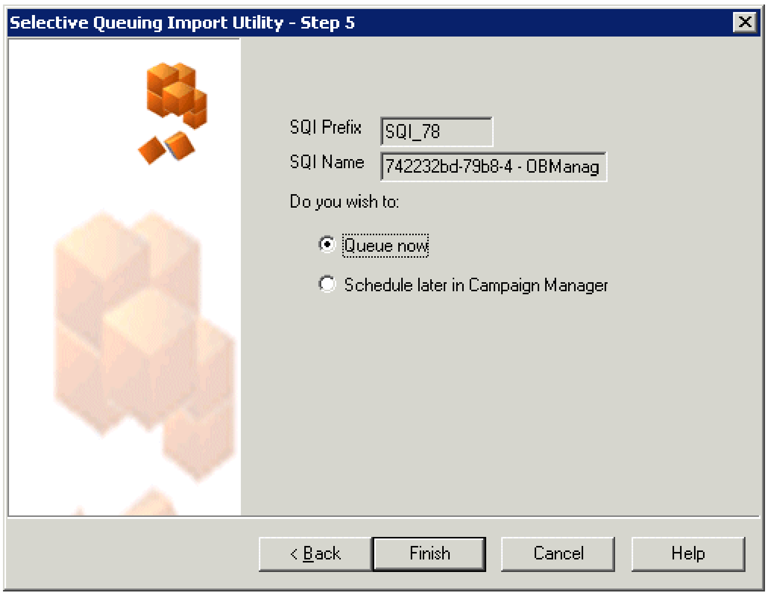
Update all fields is greyed out, as this is only relevant for the 'Import & Queue' option.

Select Option	Description
Check for duplicates (for Outbound list 'Outbound list Name' only)	To check the current Outbound list selected for duplicates.
Check for duplicates (for campaign 'Campaign Name' only)	To check all Outbound lists associated with the selected campaign for duplicates.
Check for duplicates (for CRM Prefix 'Customer_Prefix' only)	To check all Outbound lists that use the same CRM prefix.
Ignore check	If you do not need to check for duplicates, for example queuing calls for a new campaign.
Clear current queue	To remove customers from the selected outbound list, before queuing calls.
Clean customers against the Do Not Call List	To check the Phoenix_DoNotCallList table for telephone number and to remove customers from the call queue if a match is found.
Update all fields	Activated for Import & Queue option only. Tick to update all fields within your CRM, do NOT tick, if only selected fields are to be updated.

The last step of the Wizard gives you the option to queue the customers immediately or to schedule the queuing process for a later stage.

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

- Queue now
- Schedule later in Campaign Manager'



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

Schedule later in Campaign Manager

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

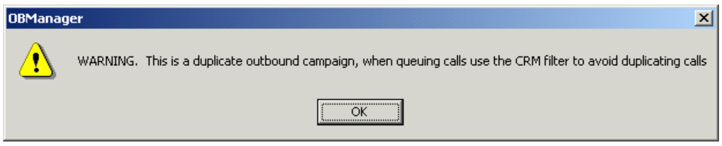
If you want to schedule a SQI report later in the Campaign Manager, enter a new logical SQI name and make a note of the name entered or copy it, as you will need the SQI name, when setting up your SQI report.

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

Queuing Customers for a Second Outbound List

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

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



Selective Queuing Import "SQI"

SELECTIVE QUEUING IMPORT ("SQI")

INTRODUCTION

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

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

Users determine which data source and which columns in one specific table from that data source are to be used in the import. They then can define the import selection criteria, specifying which records to import and define the output of the import process, which is essentially a Synthesys CRM table and the way in which the input columns relate to the CRM columns.

Users can furthermore decide whether to run the data import immediately or at a later stage, creating a SQI report and schedule for the report to be run and if required customer records to be queued.

THE SQI WIZARD

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

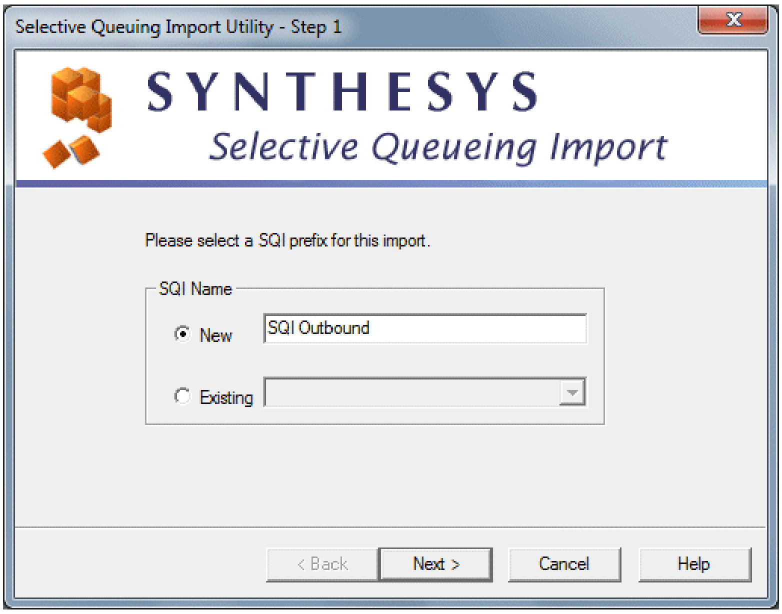
- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab and in the Launch Applications screen select ***Outbound.***
- Select the required Outbound list and go to ***Edit*** on the menu bar.
- Select Queue calls using Selective Queuing Import to open the SQI Wizard.

In the first window of the SQI Wizard

- Enter a name for a *New* SQI import

Or

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



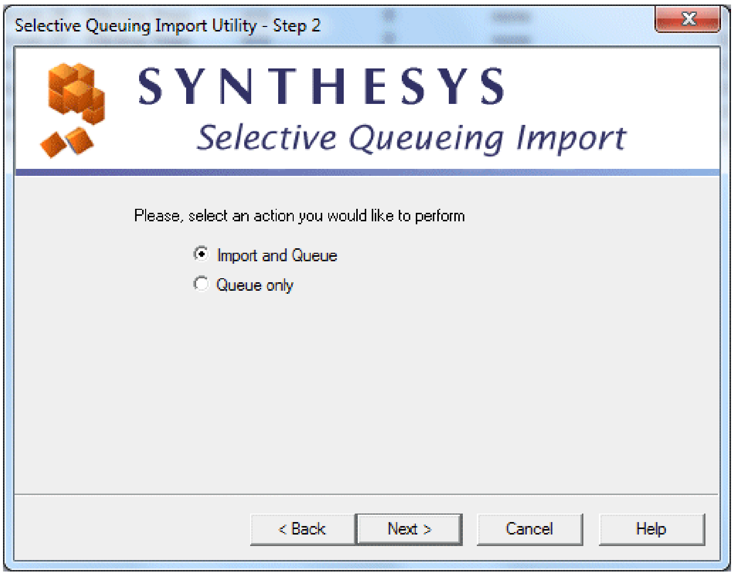
Click Next> to continue to the next page of the wizard.

SQI 'Import and Queue'

In the second page of the SQI Wizard, you can now select either:

Import and Queue	To Import customer data into the CRM, as well as queuing customers in the Outbound Manager
Queue only	To simply queue the customers already in your CRM

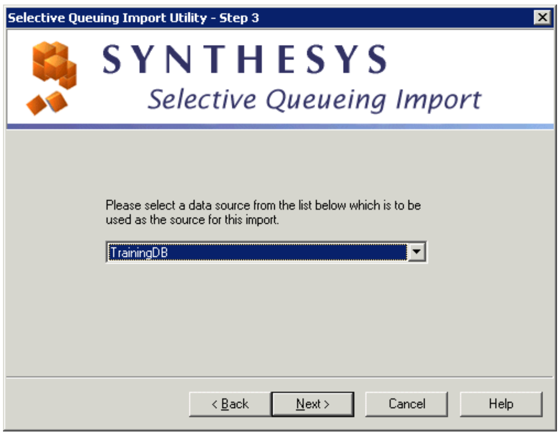
To queue customers from an external data source, you <u>must</u> use the 'Import and Queue' option, to import the customers into the CRM first, before they can be queued. If the customer records are already in the CRM, you can use the 'Queue only' option.



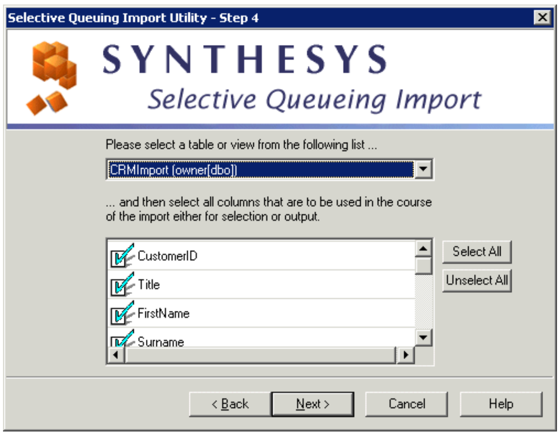
Click Next> to continue to the next page of the wizard, where you select the required data source, database table and columns.

Part 1: Input – Data Source & Table Columns

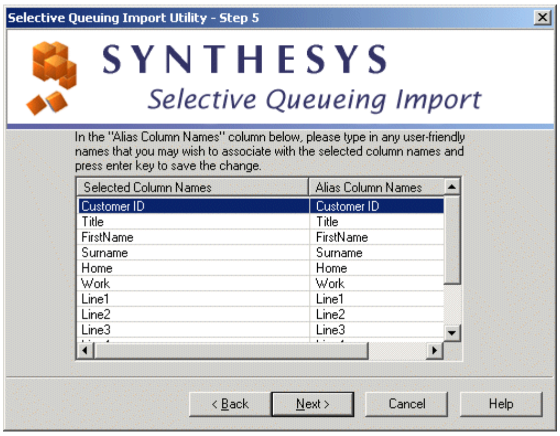
You now need to select the database that contains the table with the data to be imported from the list of ODBC data sources available on the system.



Next, select the table or view from the selected data source, and the columns from that table/ view to be used in the import.



The last step in this part allows you to give the selected fields more user-friendly names.



The first column contains the selected column names.

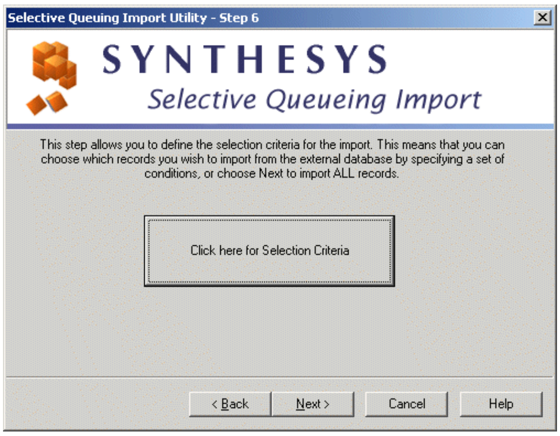
The second column ('Alias column') an editable field in which you can type any user-friendly names that you may wish to associate with the selected column names.

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

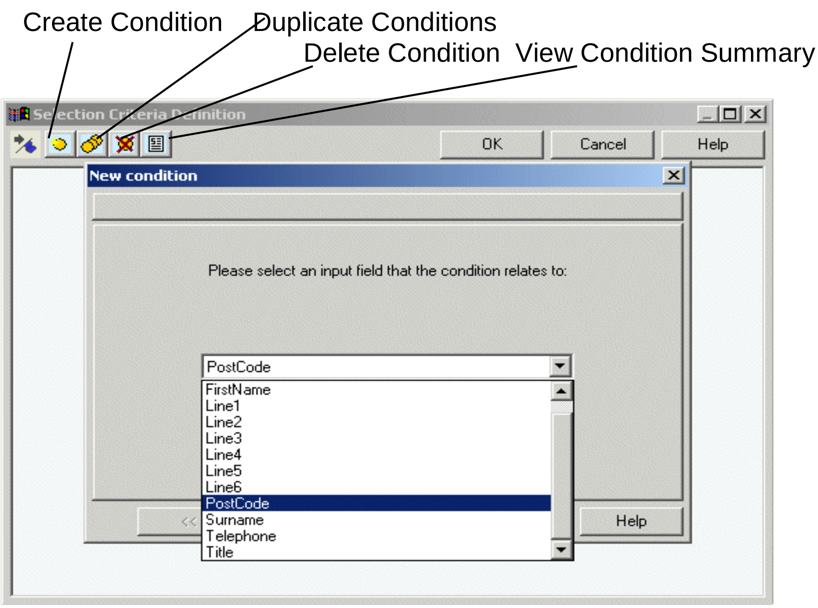
Part 2: Import Selection Criteria

The 'Import Selection Criteria' allow you to choose which records to import, by specifying a set of conditions. If you wish to import all records, skip this step by clicking Next>.

Clicking the 'Selection Criteria' button will open the 'Selection Criteria Definition' screen.



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



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

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

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

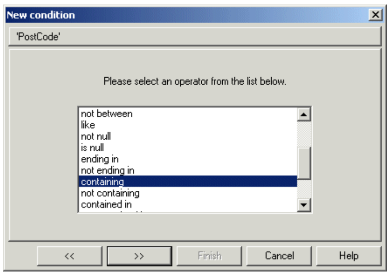
 **'View condition summary'** click this icon, to view a summary of all conditions.

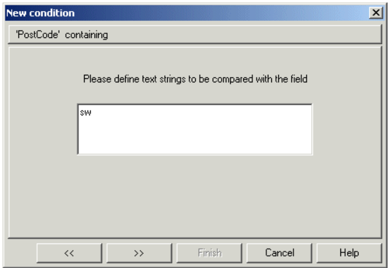
To create a new condition:

- Click the **Create Condition**  icon.

- In the ***New Condition*** window select the property to define your search using any fields available in your CRM (for example the ***Postcode*** field.

- Click the  button to move to the next screen of the wizard to select the required operator, i.e. **containing** and then type **SW** to specify that you wish **to queue all customers in the SW area**.



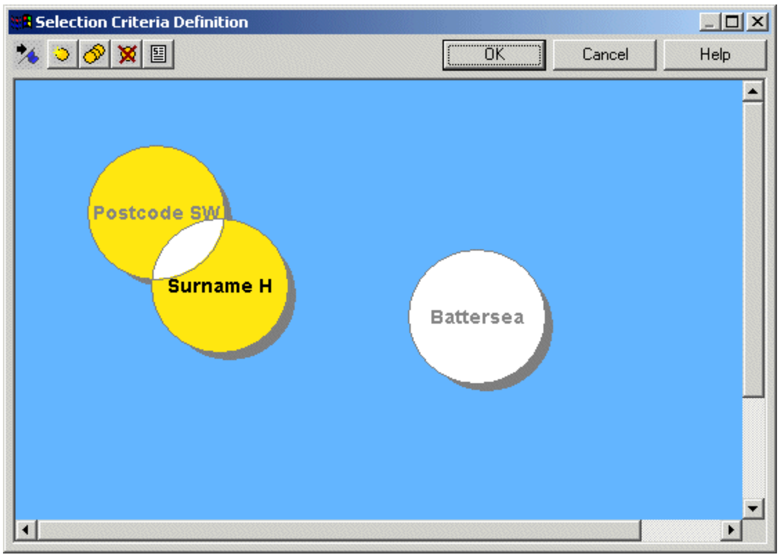


We are then prompted to enter a name for our condition, i.e. Postcode **SW**.

When the condition has been defined, the name entered next will appear on the free, floating disc on the canvas.

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

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



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

Each condition disc can be manipulated, clicking and dragging it around the canvas. Any discs that ***overlap*** with one or more other discs will ***imply a Boolean 'AND'*** to operate between the conditions. For example, customers are to be queued if:

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

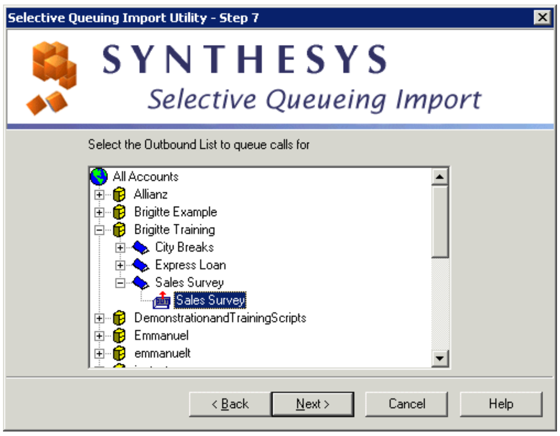
Click OK and proceed to the next page of the wizard.

Part 3: Binding Source Fields & CRM Columns

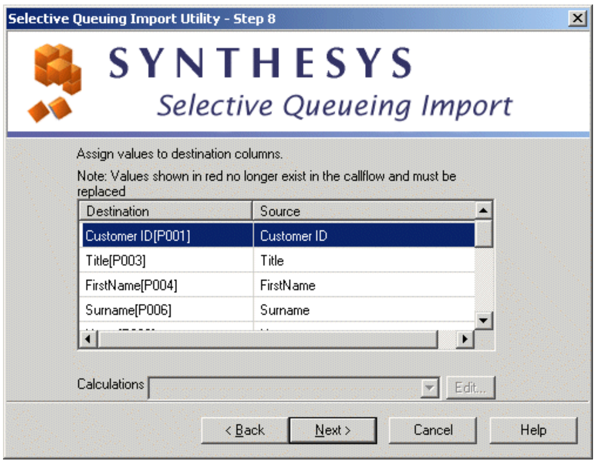
This part defines the output of the import process, which is essentially a Synthesys CRM table and the way in which the input columns relate to the CRM columns.

- Click Next> in the *Selection criteria* window to move to the next part of the SQI Wizard.
- Select the Outbound list for which you want to queue the calls.

Selecting the Outbound list will automatically determine the CRM prefix to be used.



The next step involves assigning values to the destination fields.

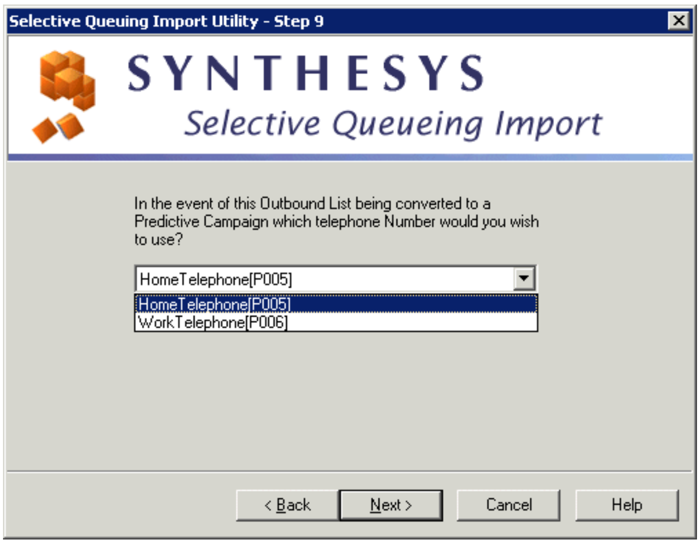


The Source column is one of the aliases defined in Part1; the Destination column is the CRM table. To change a source field:

- Click into the required field in the Source column and from the drop down menu displayed, select the appropriate field.

The *Calculations* option is not available in the current version.

If your CRM contains more than one telephone number, the next screen of the wizard will ask you to select the number that you wish to use in the event of the campaign being turned into a Predictive Outbound list.



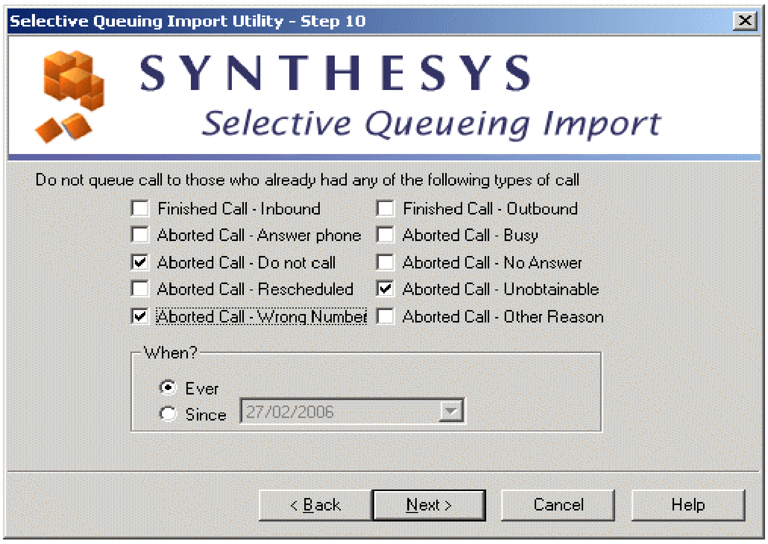
Part 4: Queuing Customer Records

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

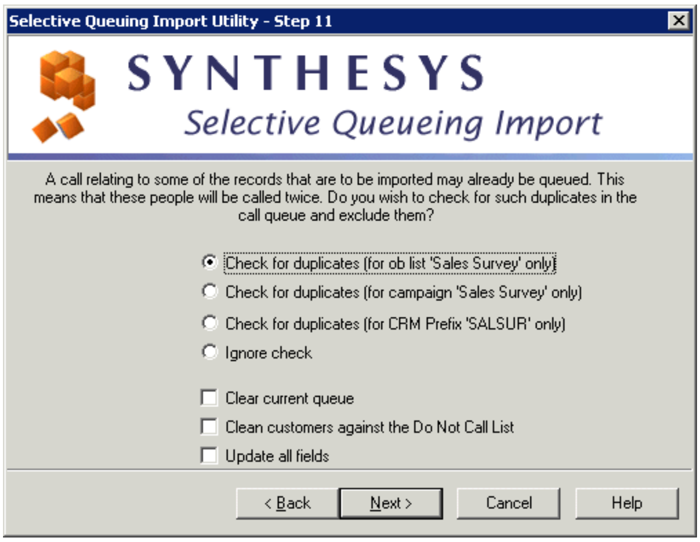
In this part of the wizard you can define restrictions to be imposed when queuing calls, based on previous contact with a specific customer.

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

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



The next page of the SQI Wizard allows you to check for possible duplicates in the queuing process, i.e. to check that no call is already queued for this person. Note: Checking for duplicates can take a long time to perform.



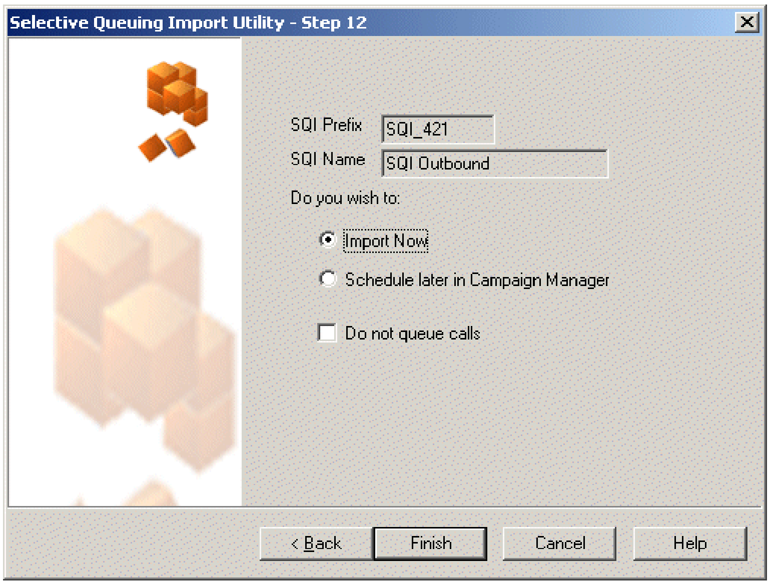
Do NOT tick the 'Update all fields' box, if you only wish to update some of the selected CRM fields.

Select Option	Description
Check for duplicates (for Outbound list 'Outbound list Name' only)	To check the current Outbound list selected for duplicates.
Check for duplicates (for campaign 'Campaign Name' only)	To check all Outbound lists associated with the selected Campaign for duplicates.
Check for duplicates (for CRM Prefix 'Customer_Prefix' only)	To check all Outbound lists that use the same CRM prefix.
Ignore check	If you do not need to check for duplicates, for example queuing calls for a new campaign.
Clear current queue	To remove customers from the selected outbound list, before queuing calls.
Clean customers against the Do Not Call List	To check the Phoenix_DoNotCallList table for telephone number and to remove customers from the call queue if a match is found.
Update all fields	Tick to update all fields within your CRM, do NOT tick, if only selected fields are to be updated.

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

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

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



- Tick **Import now** to queue the customers immediately. The queue process will start in the background and after a short while all relevant calls will be displayed. To refresh the Outbound Manager, you can press the F5 key.
- Tick **Schedule later in Campaign Manager** to queue customers at a later stage, running a SQI report. Make a note of the SQI name, as you will need the SQI name, when setting up your SQI report.
- Tick **Do not queue calls,** if you want to run the CRM Import without queuing customers.

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

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

Noetica

SQI ‘Queue only’

Part 1: Enter or select a SQI Name

- To set up a new Queue Only queuing import, enter a new SQI name.
- To view an existing SQI Import, select an existing SQI name from the drop down menu.

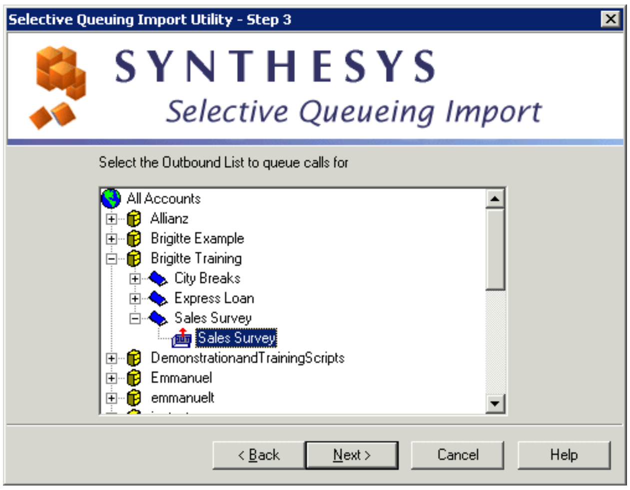
If you select an existing SQI name, the *Import and Queue* or *Queue Only* options in Step 2 of the wizard will be greyed out, as the type of import action associated with the selected SQI name has already been defined.

If the customer records are already in the CRM, you can use the ‘Queue only’ option.

To import customer records first, before placing them into the queue, use the ‘Import and Queue’ option

Part 2: Selection of Outbound List

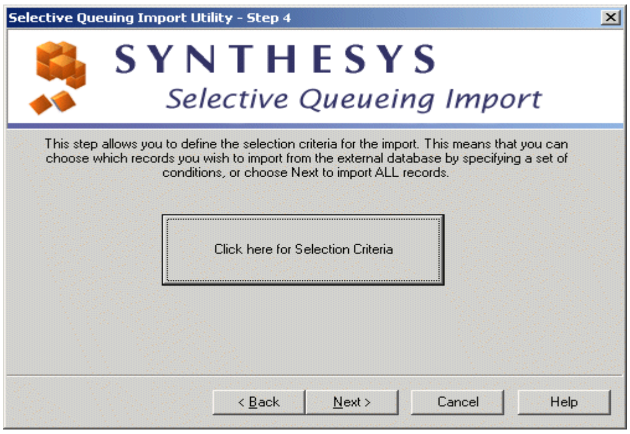
You now need to select the Outbound list, for which you want to queue the customer records.



Click Next> to move you to the next page of the wizard.

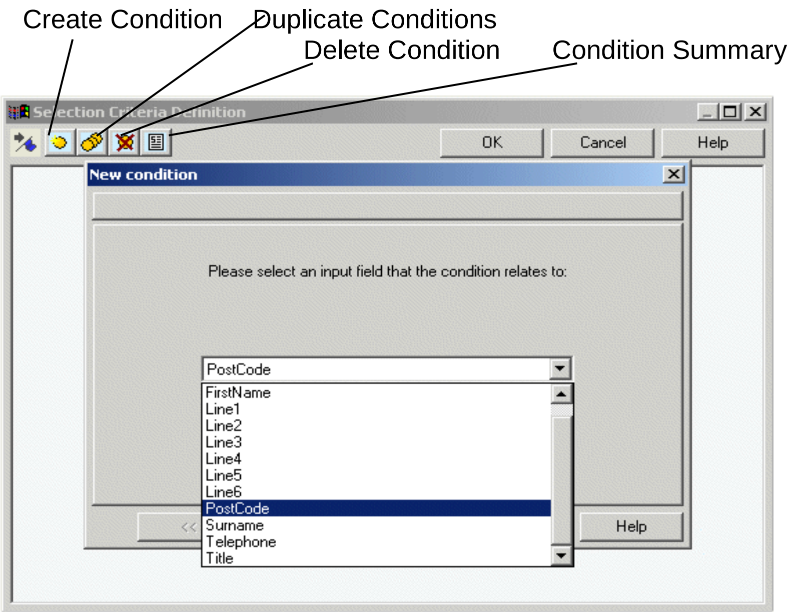
Part 3: Set Selection Criteria for Queuing

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



Click the ‘Selection Criteria’ button will open the ‘Selection Criteria Definition’ screen.

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

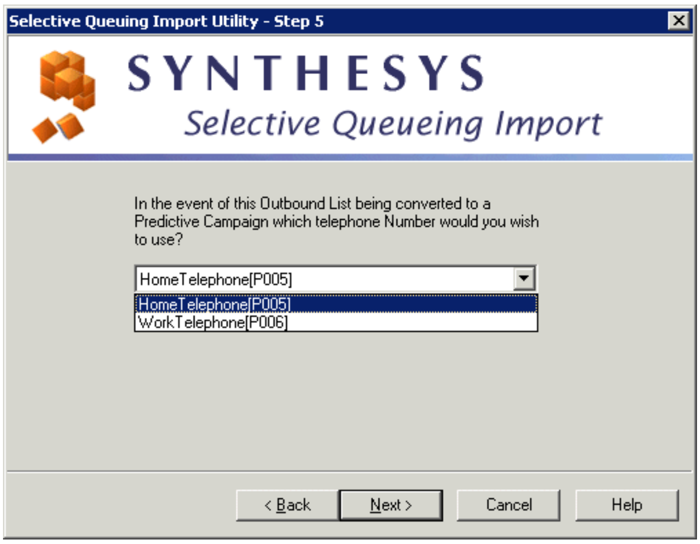


To create a new condition, click the **‘Create Condition’**  icon. In the ‘New Condition’ window, select the property according to which you want to define your search. You can use any field that is available in your CRM (in our example we have selected ‘Postcode’).

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

Clicking OK, and Next>, to proceed to the next part of the Wizard.

Select the telephone number that you wish to use, in the event of the campaign being turned into a Predictive Outbound list.



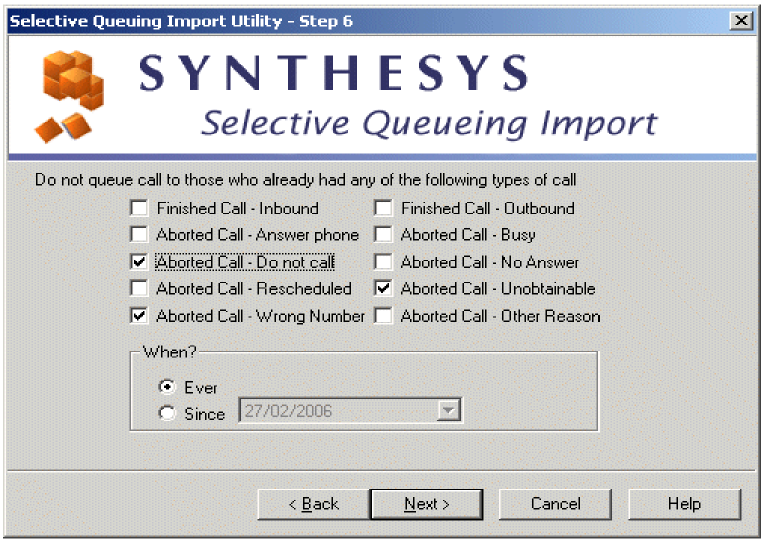
Part 4: Queuing Customer Records

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

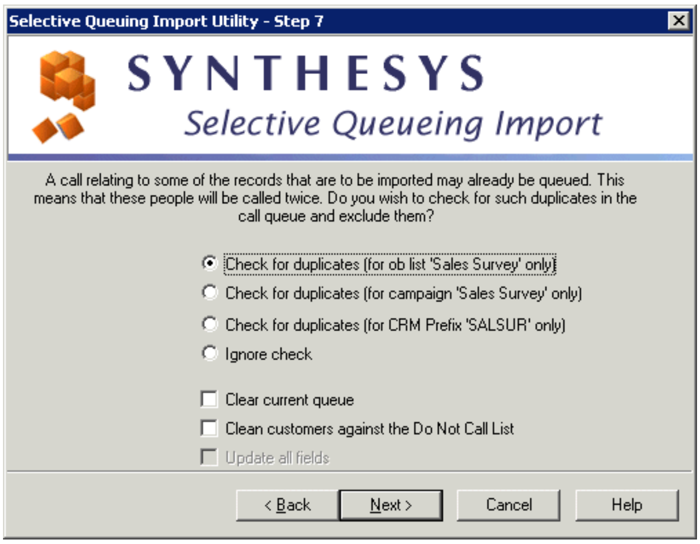
Here you can define restrictions to be imposed when queuing calls, based on previous contact with a specific customer.

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

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



You now have the option to check for possible duplicates in the queuing process, i.e. do you want to check that no call is already queued for this person.

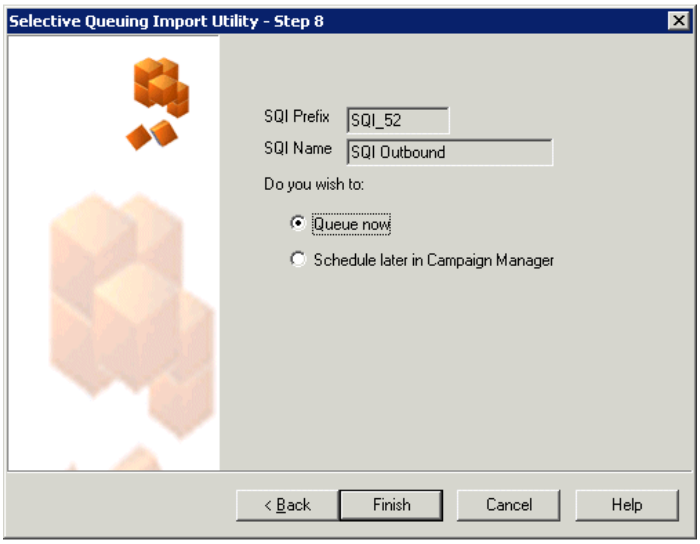


Update all fields is greyed out, as this is only relevant for the 'Import & Queue' option.

Select Option	*Description*
Check for duplicates (for Outbound list 'Outbound list Name' only)	To check the current Outbound list selected for duplicates.
Check for duplicates (for campaign 'Campaign Name' only)	To check all Outbound lists associated with the selected Campaign for duplicates.
Check for duplicates (for CRM Prefix 'Customer_Prefix' only)	To check all Outbound lists that use the same CRM prefix.
Ignore check	If you do not need to check for duplicates, for example queuing calls for a new campaign.
Clear current queue	To remove customers from the selected outbound list, before queuing calls.
Clean customers against the Do Not Call List	To check the Phoenix_DoNotCallList table for telephone number and to remove customers from the call queue if a match is found.
Update all fields	Tick to update all fields within your CRM, do NOT tick, if only selected fields are to be updated.

The last step of the Wizard gives you the option to queue the customers immediately or to schedule the queuing process for a later stage.

- Queue now
- Schedule later in Campaign Manager'



Remember to make a note of the SQI name entered, as you will need the SQI name, when scheduling your SQI report in the Campaign Manager.

- Tick **Queue now** to queue the customers immediately. The queue process will start in the background and after a short while all relevant calls will be displayed. To refresh the Outbound Manager, you can press the F5 key.
- Tick **Schedule later in Campaign Manager** to customers at a later stage, running a SQI report. Make a note of the SQI name entered, as you will need the SQI name, when scheduling your SQI report.

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

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

SCHEDULE A SQI IMPORT IN CAMPAIGN MANAGER

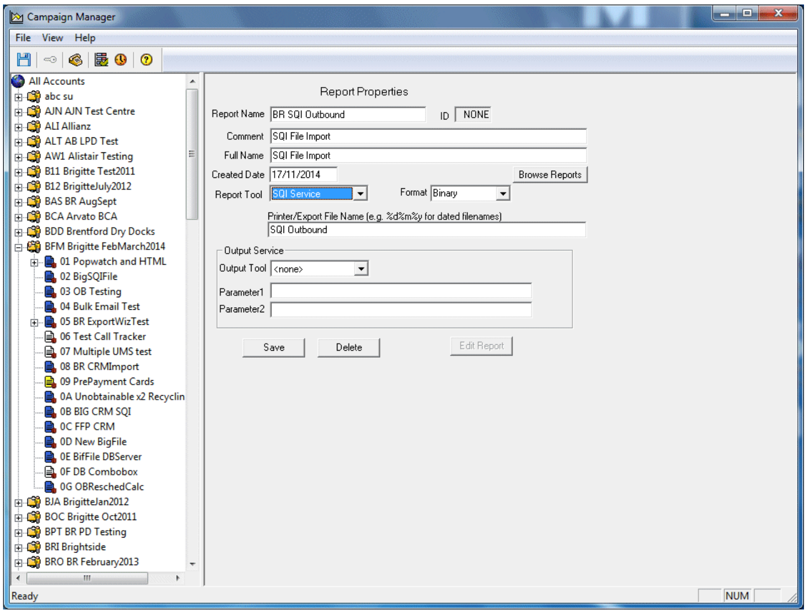
To set up a SQI report and schedule in the *Campaign Manager*:

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab and in the Launch Applications screen select ***Reports,*** to open the Synthesys Campaign Manager.

Setting up a SQI Report

In the Campaign Manager:

- Locate and right click on your campaign and select ***Add New Report***.
- Enter the ***Report Name***, any ***Comments*** as required and type a name into the ***Full Name*** field.
- Select ***SQI Service*** in the ***Report Tool*** field.
- Next, type in the ***SQI name*** as entered in Step 2 of the SQI Wizard into the Printer/Export File Name field, for example ***SQI Outbound***.
- ***Save*** your SQI report.

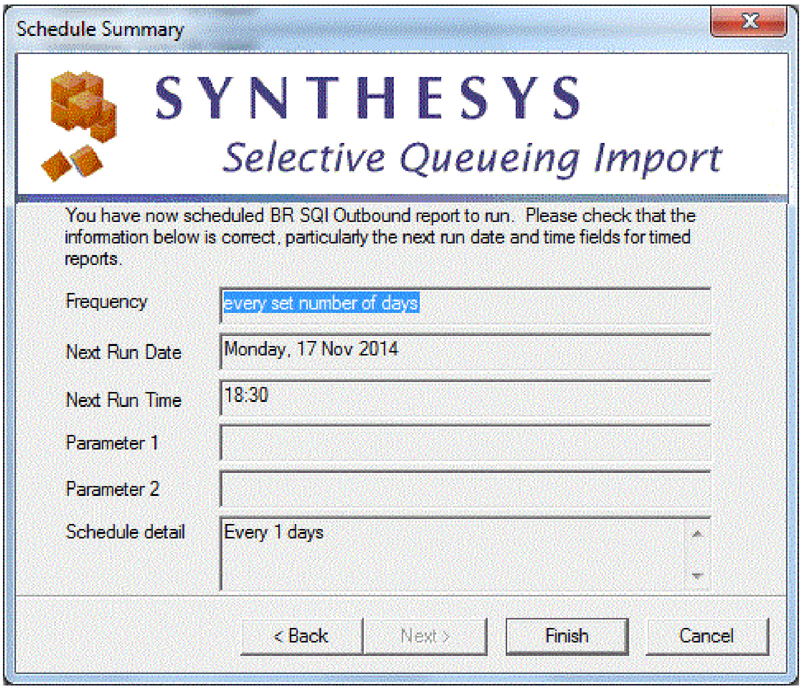


Scheduling a SQI Report

To add a schedule for your SQI report:

- Locate and right click on your report in the *Campaign Manager* and select **Add Schedule**
- In the ***Schedule Wizard***, select a start and end date and the ***frequency*** of the report run.
- ***Save*** the schedule for your SQI report.

In our example, the next SQI report will run on Monday 17th November at 18:30.

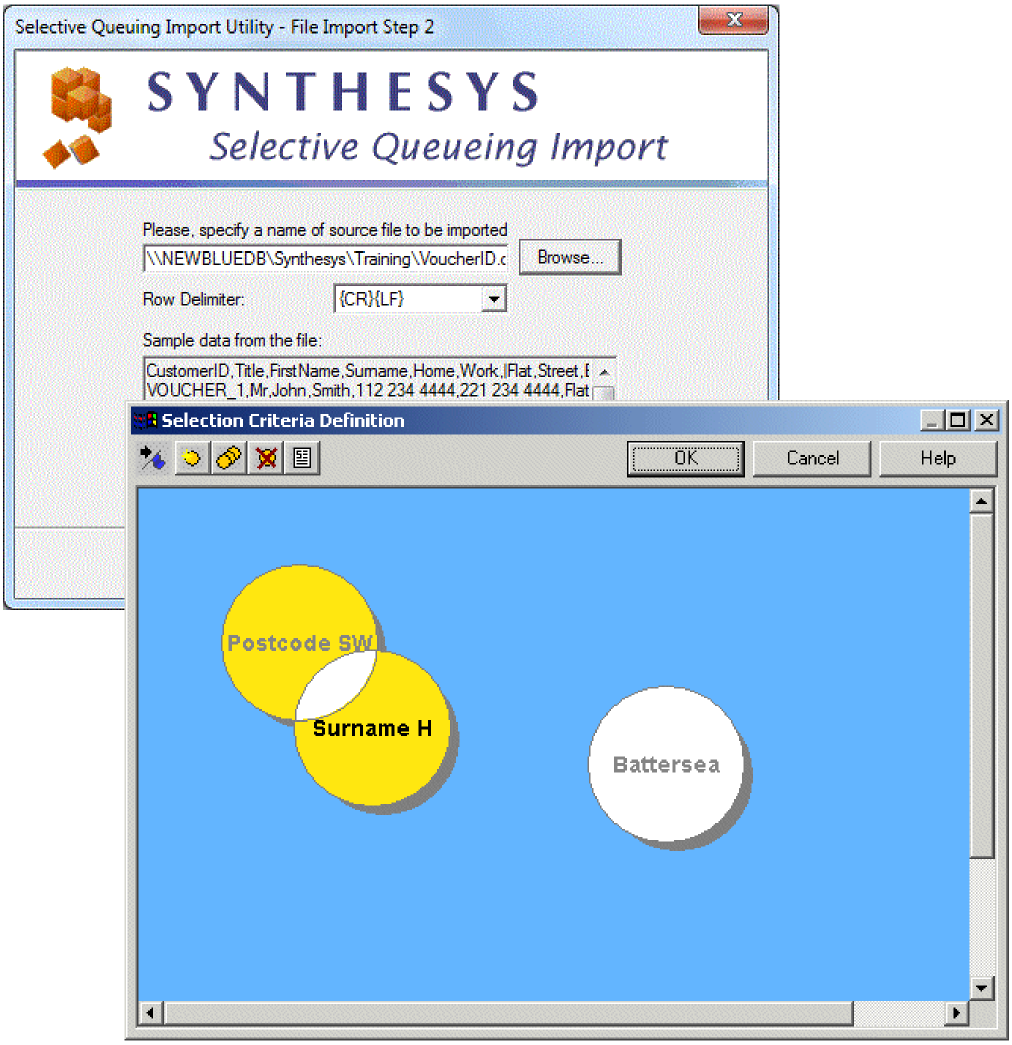


To check that your SQI report has run successfully

- Go to ***Report Runs*** or alternatively check the queue in the Outbound manager.

*For further information regarding setting up reports and schedules, please see the he **Reports** manual.*

Selective Queuing File Import "SQI"



SELECTIVE QUEUING FILE IMPORT (“SQI”)

INTRODUCTION

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

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

Users determine which file is to be used for the import. They then can define the import selection criteria, specifying which records to import and define the output of the import process, which is essentially a Synthesys CRM table and the way in which the data to be imported relates to the CRM columns.

Users can furthermore decide whether to run the data import immediately or at a later stage, creating a SQI report and schedule for the report to be run and if required customer records to be queued.

SELECTIVE QUEUING FILE IMPORT (“SQI”)

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

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab and in the Launch Applications screen select ***Outbound.***
- Select the required Outbound list and go to **Edit** on the menu bar.
- Select Queue calls using Selective Queuing File Import to open the SQI Wizard.

The SQI Wizard

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

Please see the following pages for details.

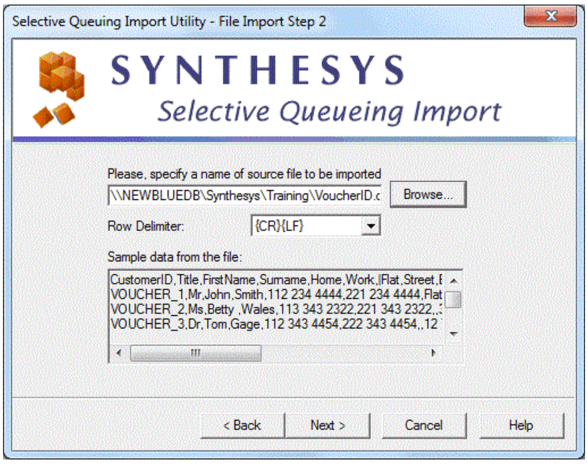
Part 1: Data Input, Source File and Table Columns

Selecting the Data File

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

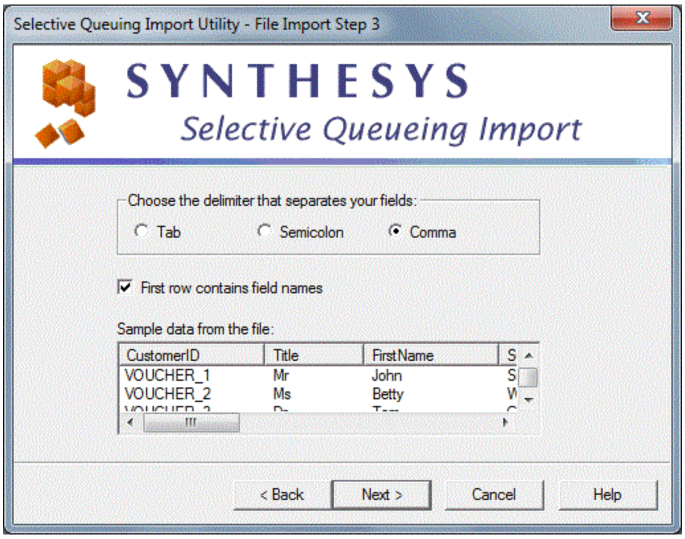
Step 1: SQI Welcome screen. Click the *Next* tab of the SQI Welcome screen to move to the next page of the Wizard.

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



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

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



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

Creating a Temporary Data Import Table

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

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

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

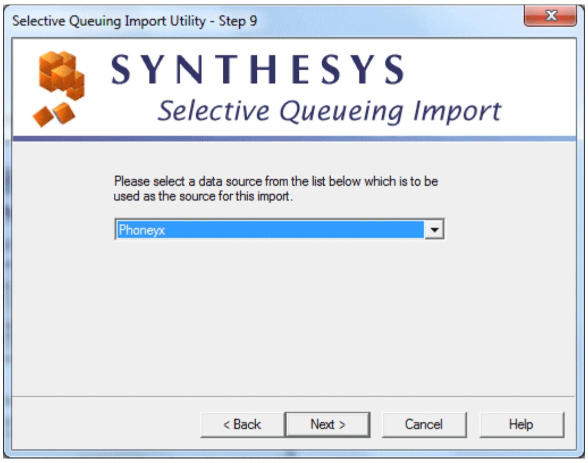
Data Source and Table Columns

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

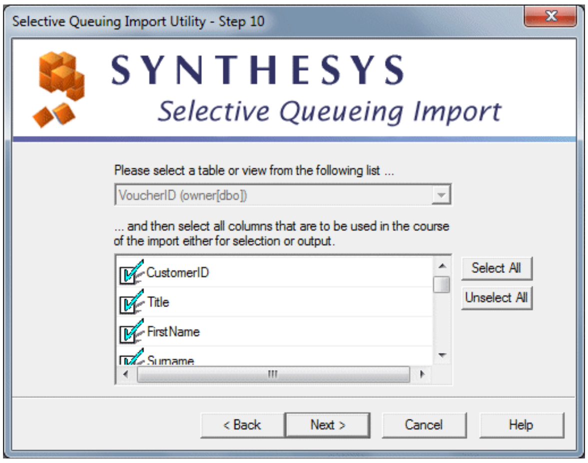
Step 7: Enter a **new name** for your SQI import **or** select an **existing SQI name** from the drop down menu.

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

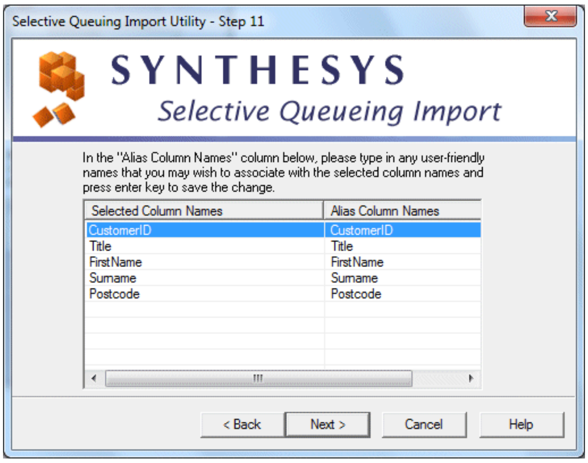
Step 9: Now, select the required data source from the list of ODBC data sources available on the system. You need to select **Phoenix**, as this is the location of the temporary table that you have created.



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



Step 11: The first column contains the selected column names, the second column ('Alias column') an editable field in which you can type any user-friendly names that you may wish to associate with the selected column names.



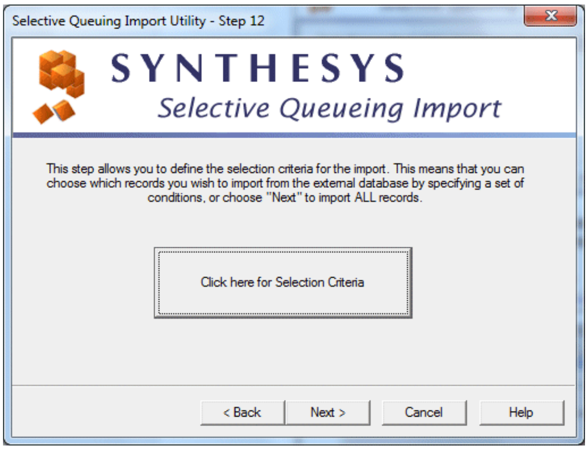
To change the name displayed in the Alias column, click into the field and type in the user-friendly name.

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

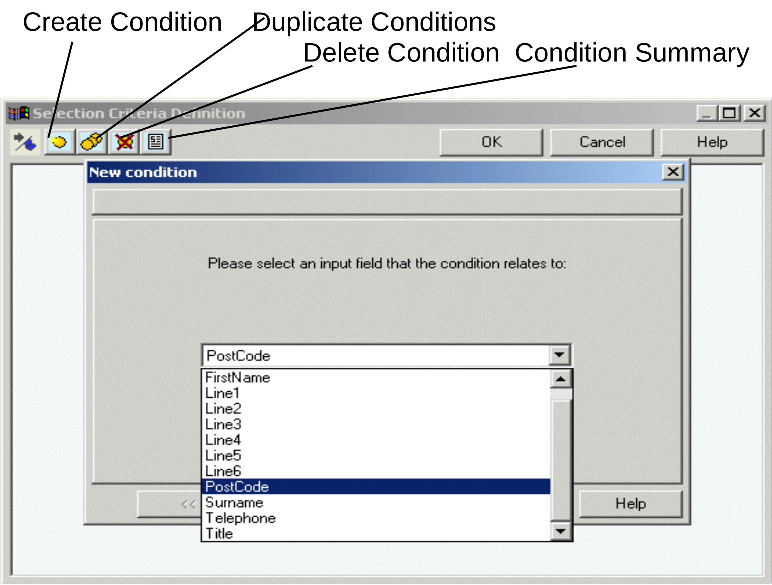
Part 2: Defining Import Selection Criteria

The 'Import Selection Criteria' allow you to choose which records to import, by specifying a set of conditions. If you wish to import all records, skip this step by clicking the 'Next' tab.

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



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



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

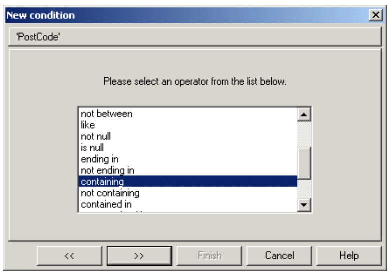
 '**Duplicate condition'.** Click this icon, to duplicate an existing condition.

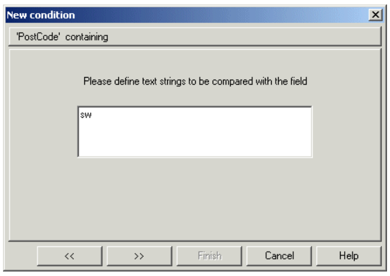
 **'Delete a condition'.** Click on the disc that you wish to delete, and then on the 'Delete condition' icon.

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

To create a new condition

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

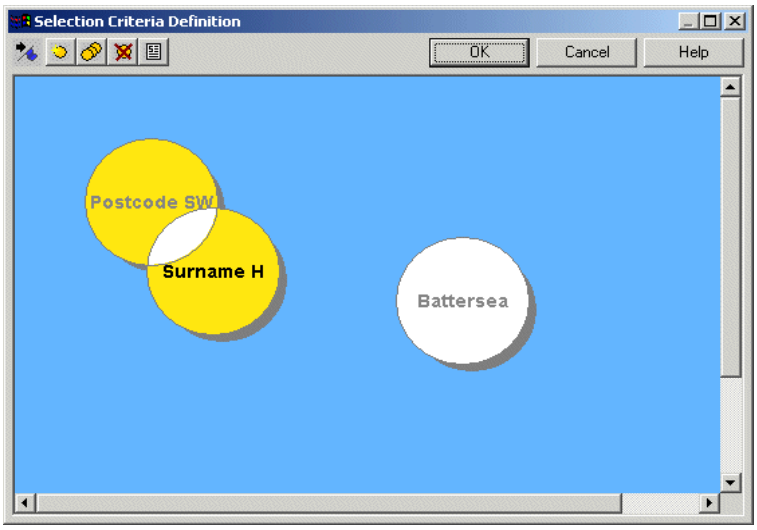




We are now prompted to enter a name for our condition, i.e. **'Postcode SW'**.

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

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



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

If 2 discs are overlaid completely you need to press CONTROL on the keyboard to drag them apart.

Each condition disc can be manipulated, clicking and dragging it around the canvas. Any discs that ***overlap*** with one or more other discs will ***imply a Boolean 'AND'*** to operate between the conditions. For example, customers are to be queued if:

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

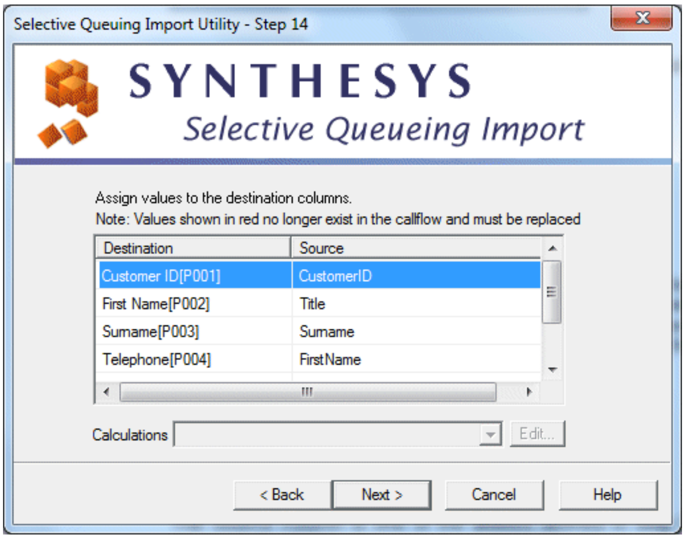
Click OK, and proceed to the next step.

Part 3: Binding Source Fields & CRM Columns

This part defines the output of the import process, which is essentially a Synthesys CRM table and the way in which the input columns relate to the CRM columns.

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

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



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

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

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

Part 4: Queuing Customer Records

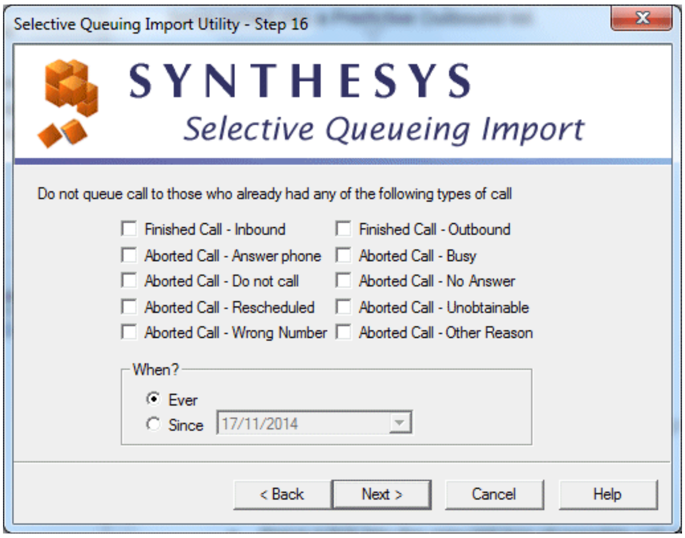
This part is concerned with the parameters governing the queuing of Outbound calls.

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

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

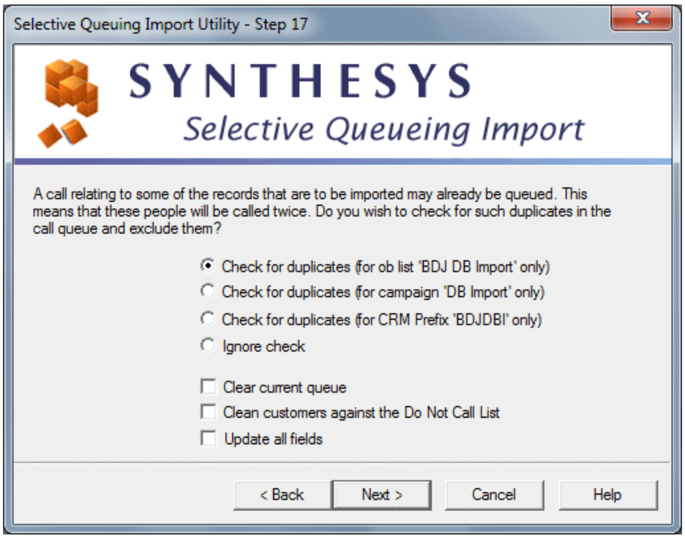
To ***Exclude*** customers from the call queue:

- Place a tick into the relevant box of possible call outcomes and if required select a date as appropriate.



Step 17: This option allows you to check for possible duplicates in the queuing process, i.e. to check that no call is already queued for this person.

Note: Checking for duplicates is advisable, but can take a long time to perform.



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

Select Option	**Description**
Check for duplicates (for Outbound list ‘Outbound list Name’ only)	To check the current Outbound list selected for duplicates.
Check for duplicates (for campaign ‘Campaign Name’ only)	To check all Outbound lists associated with the selected Campaign for duplicates.
Check for duplicates (for CRM Prefix ‘Customer_Prefix’ only)	To check all Outbound lists that use the same CRM prefix.
Ignore check	If you do not need to check for duplicates, for example queuing calls for a new campaign.
Clear current queue	To remove customers from the selected outbound list, before queuing calls.
Clean customers against the Do Not Call List	To check the Phoenix_DoNotCallList table for telephone number and to remove customers from the call queue if a match is found.
Update all fields	Tick to update all fields within your CRM, do NOT tick, if only selected fields are to be updated.

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

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

Remember to make a note of the SQI name entered, as you will need the SQI name, when scheduling your SQI report in the Campaign Manager.

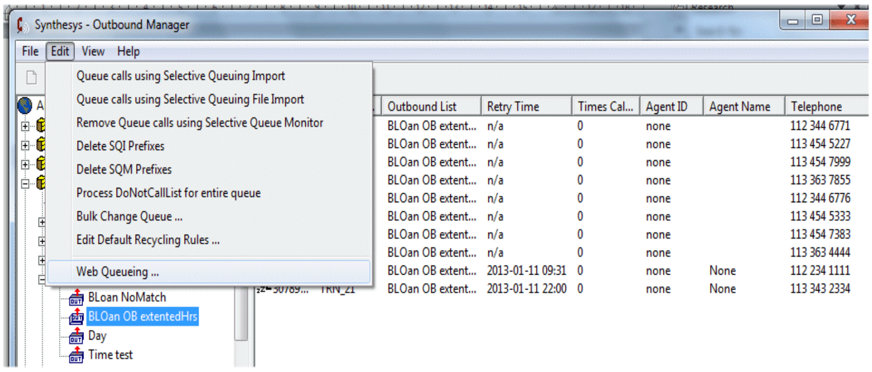
- Tick **Import now** to queue the customers immediately. The queue process will start in the background and after a short while all relevant calls will be displayed. To refresh the Outbound Manager, press the F5 key.
- Tick **Schedule later in Campaign Manager** to queue customers at a later stage, running a SQI report. Make a note of the SQI name entered, as you will need the SQI name, when scheduling your SQI report.
- Tick **Do not queue calls,** if you want to run the CRM Import without queuing customers

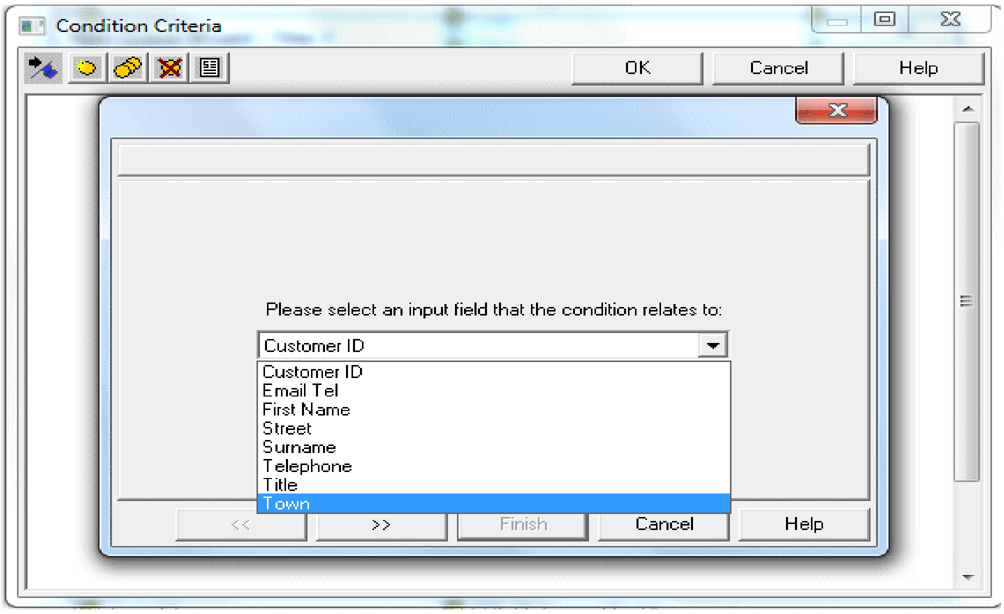
If you tick the Schedule later in Campaign Manager option, make a note of the SQI name entered, or copy it, as you will need the SQI name, when setting up your SQI report and schedule.

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

Web Queuing

The Web Queue Wizard





WEB QUEUING – THE WEB QUEUE WIZARD

Introduction

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

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

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

- In the **Web Queue wizard** users create different web queue prefixes, each containing associated queuing criteria based on CRM data, and the outbound list to be used in the queuing process.

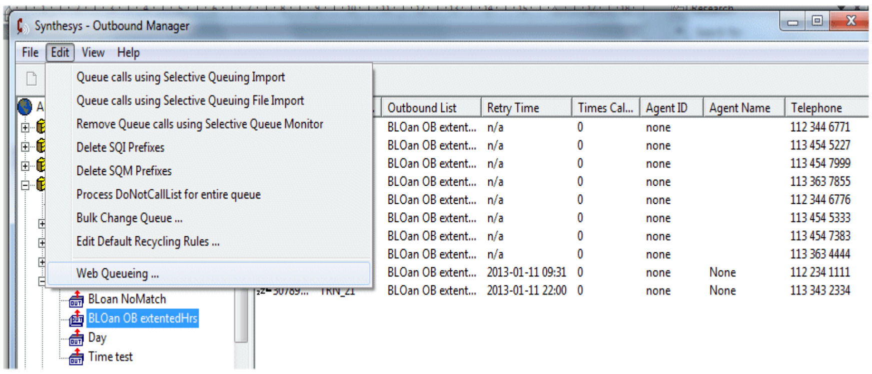
- Incoming customer leads from a web site are added to the CRM via the **CRM Web Service**.

- The **Rules Engine Web Service** then uses the web queue prefix and associated criteria to direct these leads into the appropriate outbound lists.

The Web Queue Wizard

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

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



Step 1: Entering or selecting a Web Queue name

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

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

Step 2: Selecting Outbound list for lead

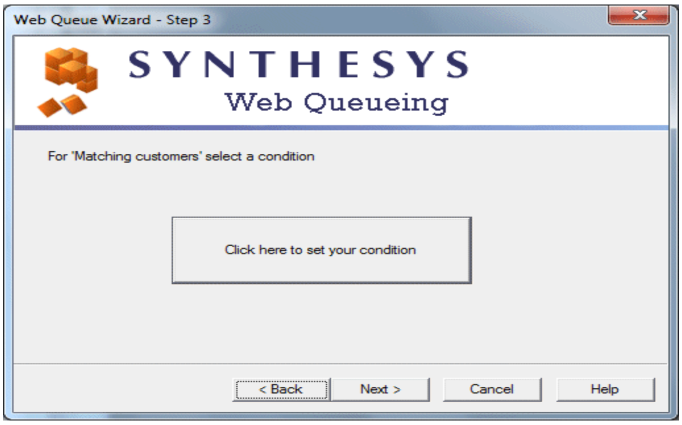
In the next page of the wizard

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

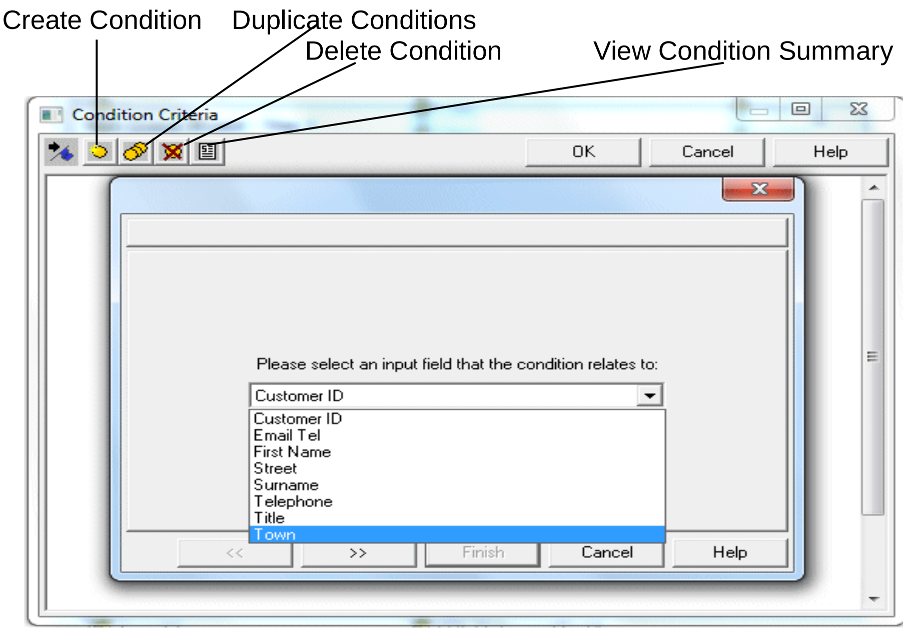
Step 3: Setting criteria based on CRM data

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

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



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



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

 '**Duplicate condition':** Duplicate an existing condition.

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

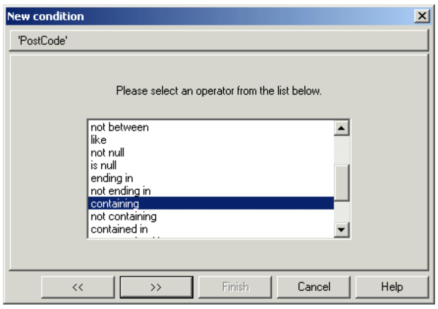
 **'View condition summary':** View a summary of available conditions.

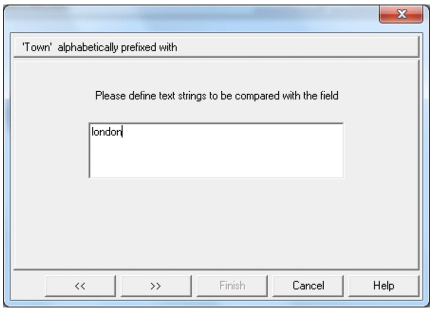
To create a new condition:

- Click the **Create Condition**  icon.

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

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

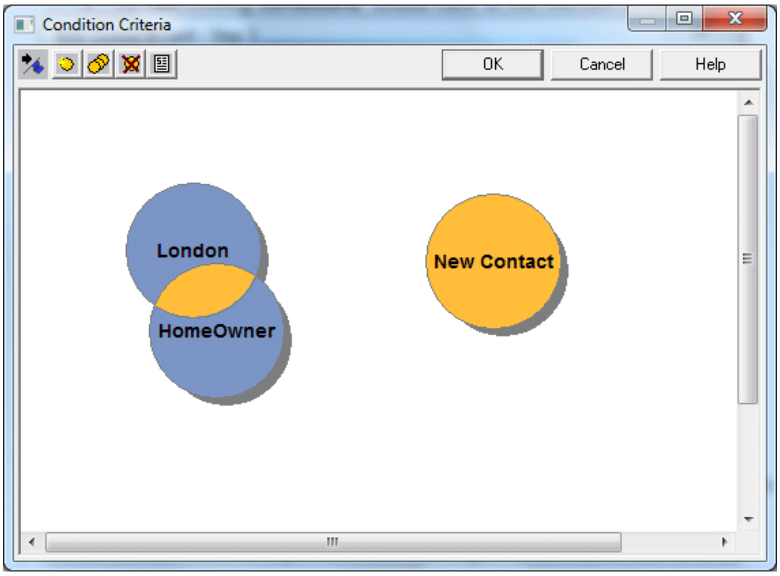




You are then prompted to enter a logical name for the criteria i.e. *London,* which will be displayed on the free floating disc on the canvas**.**

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

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



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

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

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

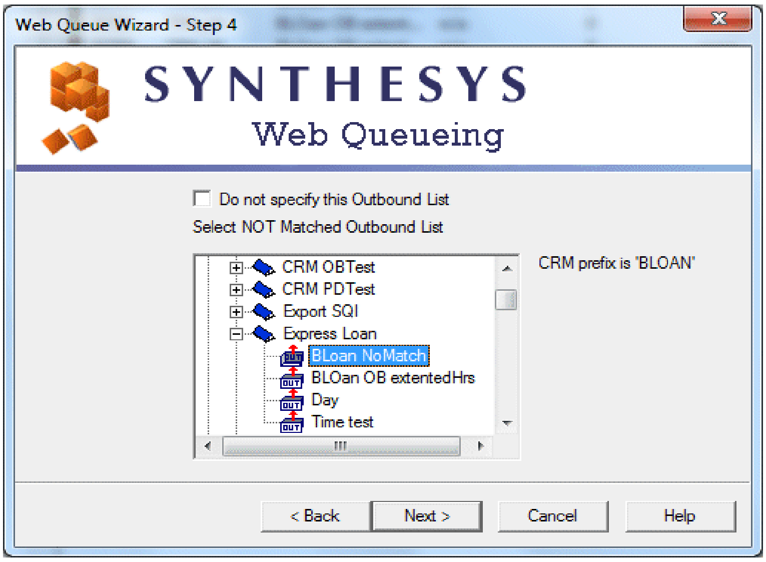
(London **AND** Home Owners) **OR** (New Contact).

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

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

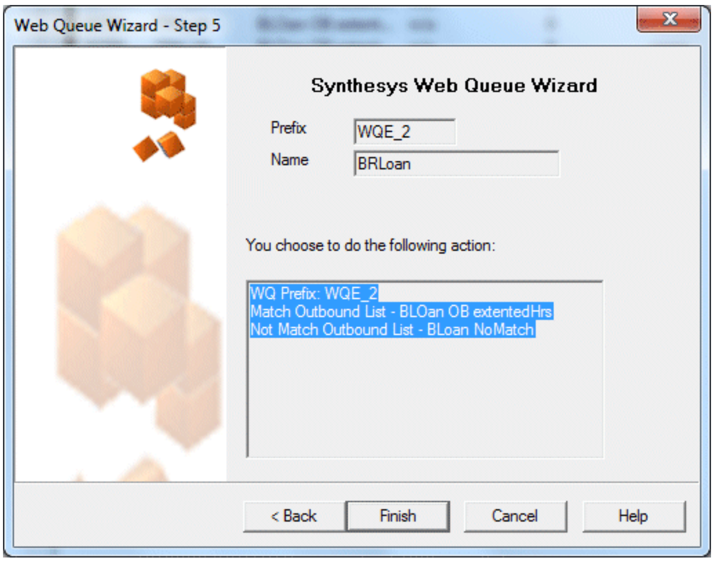
In step 4 of the Web Queue wizard

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



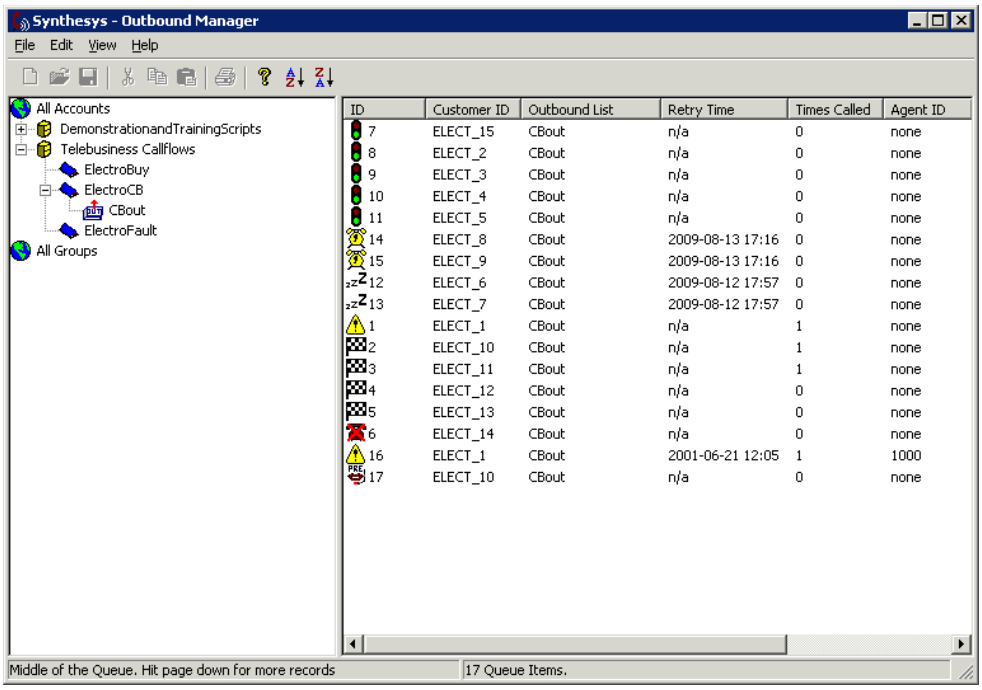
Step 3: Saving the Web Queue prefix

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



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

VIEWING QUEUED CALLS

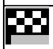
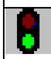
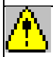
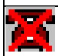
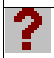
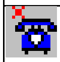
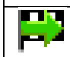


VIEWING QUEUED CALLS

To view the queued calls for an Outbound list

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab and in the Launch Applications screen select ***Outbound.***
- Click on the desired Outbound list. To display inactive Outbound lists, as well as active Outbound call lists in the tree structure, select the ***Display Inactive OBCampaigns*** option via the ***View*** menu of the Outbound Manager.

Explanation of Icons and Queue States

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

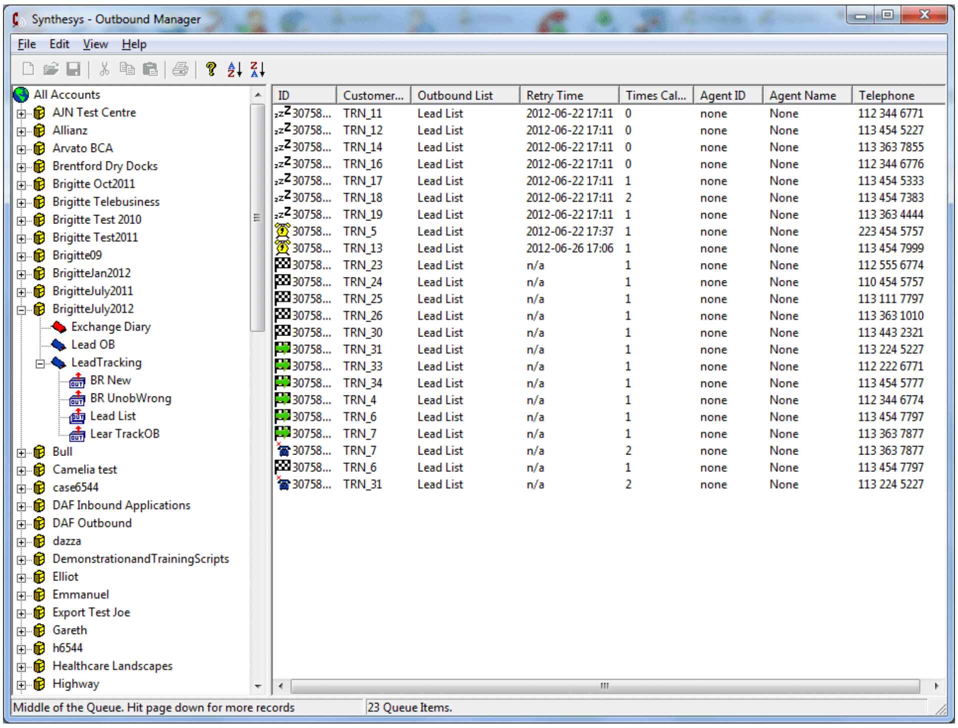
Lead Tracking

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

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

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

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

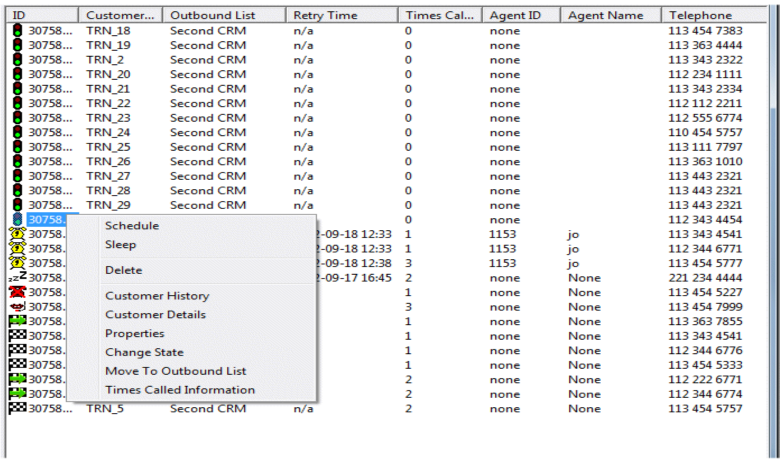


The two tables that support lead tracking are ***Phoenix_Lead*** (containing one row in phoenix_lead for each initial lead created in Synthesys) and ***Phoenix_Lead_Tracking*** (with a record for each queue instance).

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

Queue State

If you select and right click on any of the queued calls listed in the *Queue Context window* on the right, a drop down menu will be displayed from which you can select a variety of Options, depending on the call outcome.

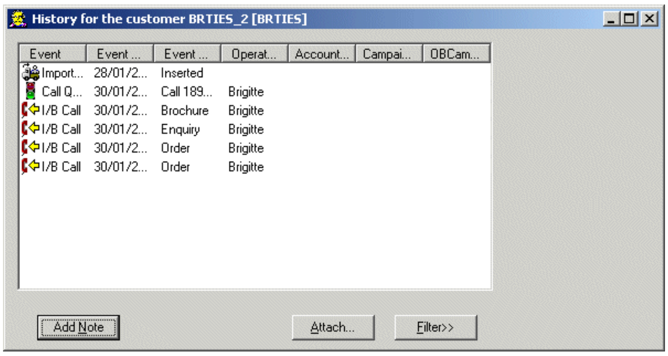


Select Option	To
Operator assign	Select a particular operator from the drop down list to take the outbound call for the selected customer, or remove the agent assignment by selecting *<De-assign Agent>.* Due Sleeping calls assigned to an operator will change to Reschedule state.
Schedule/Reschedule	Display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

Customer History

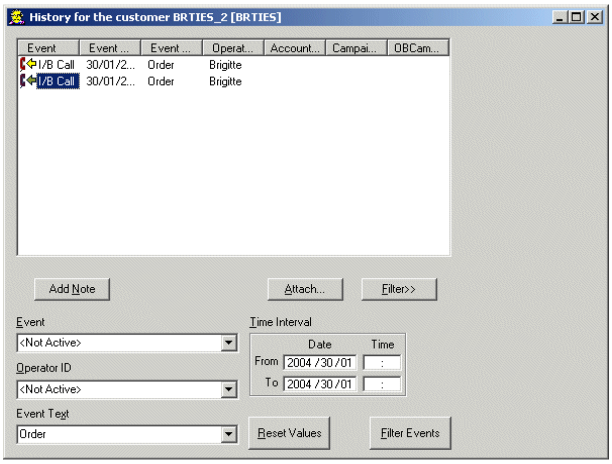
To display the history of that caller, showing details of all previous contact with the company

- Right click on a queued call and select ‘Customer History’.



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

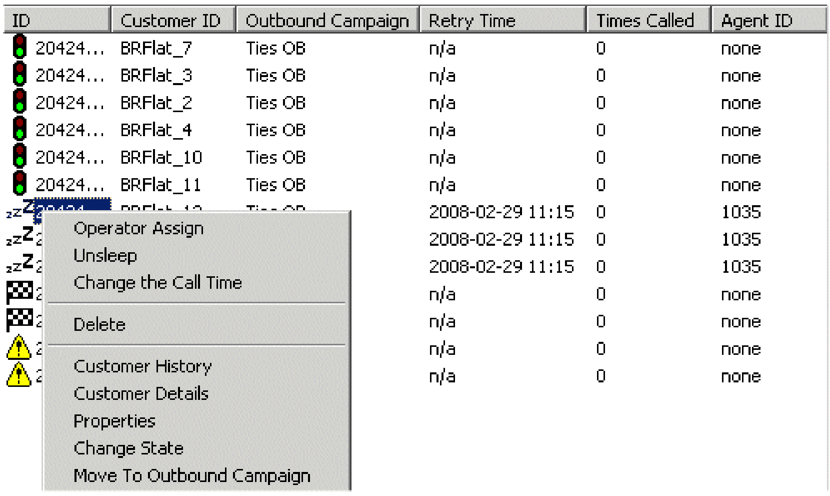
In our example we have selected all calls related to ‘Order’ only.



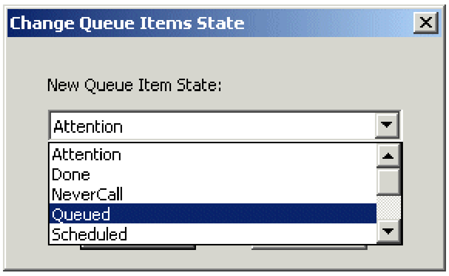
Changing State of Queued Calls

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

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



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

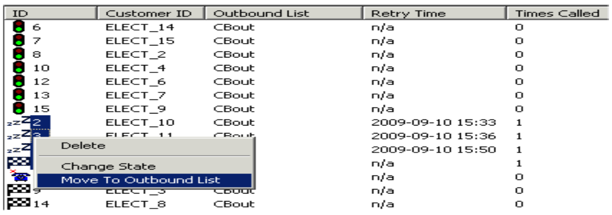


Move to Outbound List

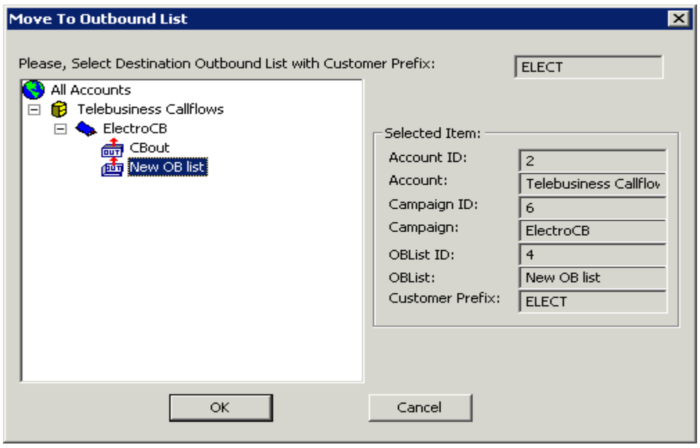
The most efficient way to move queued calls from one Outbound list to another is by using the **Queue Manipulation Wizard** (**Outbound: Edit – Bulk Change Queue**).

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

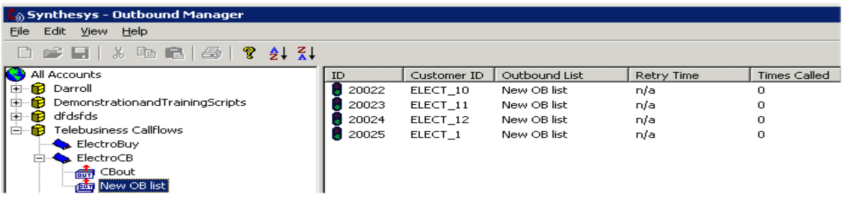
- Right-click on the calls that you wish to move and select the ***Move to Outbound List*** option.



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



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



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

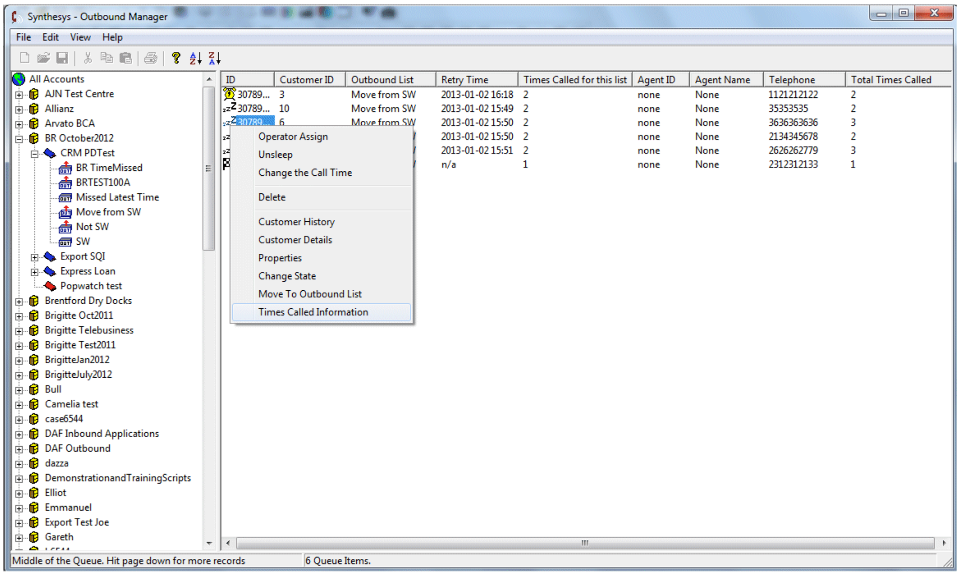
*To move multiple calls on a regular basis use the **Queue Manipulation Wizard** (Outbound: Edit – Bulk Change Queue).*

Times Called Information

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

More detailed call information can be viewed via the ***Times Called Information*** option:

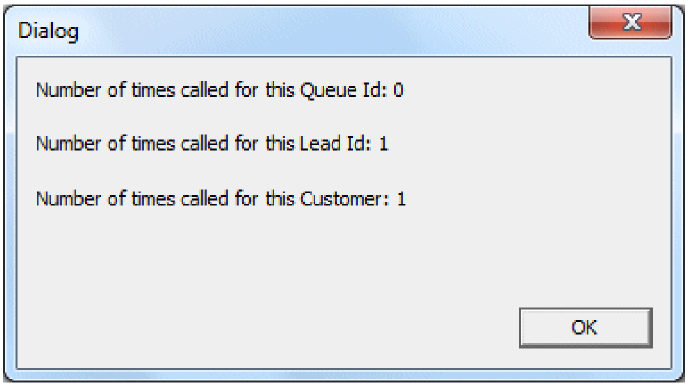
- Right-click on the queued call in the *Outbound Manager* and select the **Times Called Information** option from the drop down menu.



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

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

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

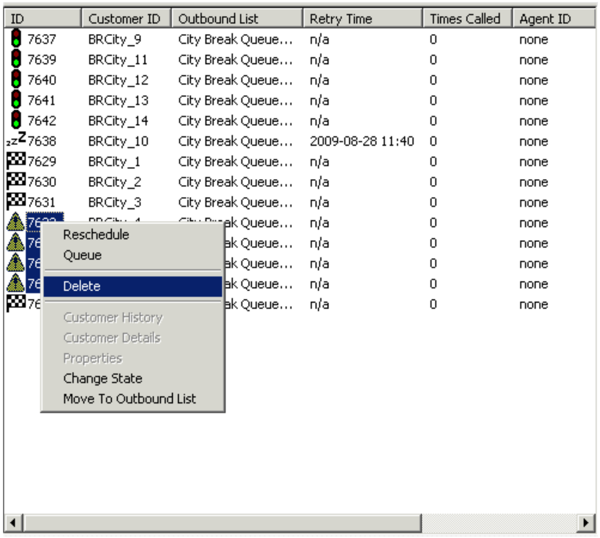


Deleting Queued Items

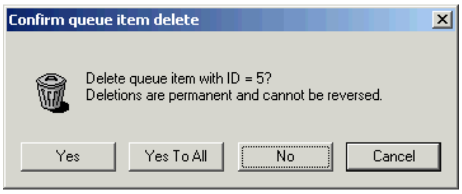
To delete selected items from the call queue:

- Select and right click on the relevant ID's in the right-hand window.
- Select Delete from the drop down menu.

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



If you are sure that you want to delete all items that you have selected from the call queue, click the 'Yes to All' button in the 'Confirm queue item delete' window.



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

A message will confirm the number of items deleted successfully.

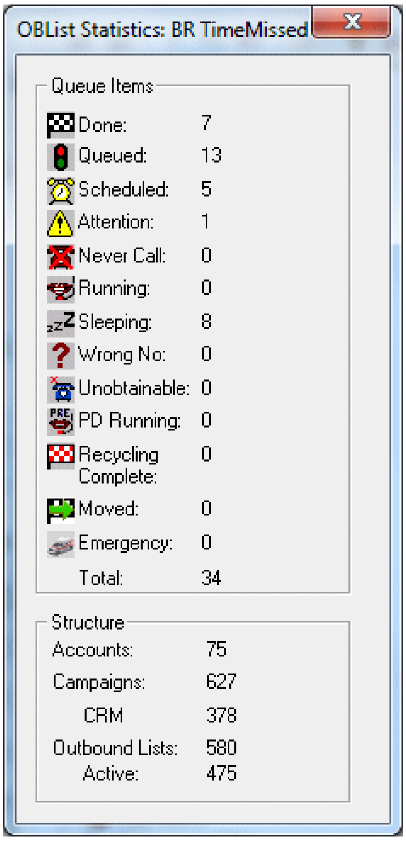
Viewing Queue Statistics

To view statistical information on all calls queued for a particular Account or Campaign

- Right click on the relevant Account or Campaign and select ‘ Statistics’.

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

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



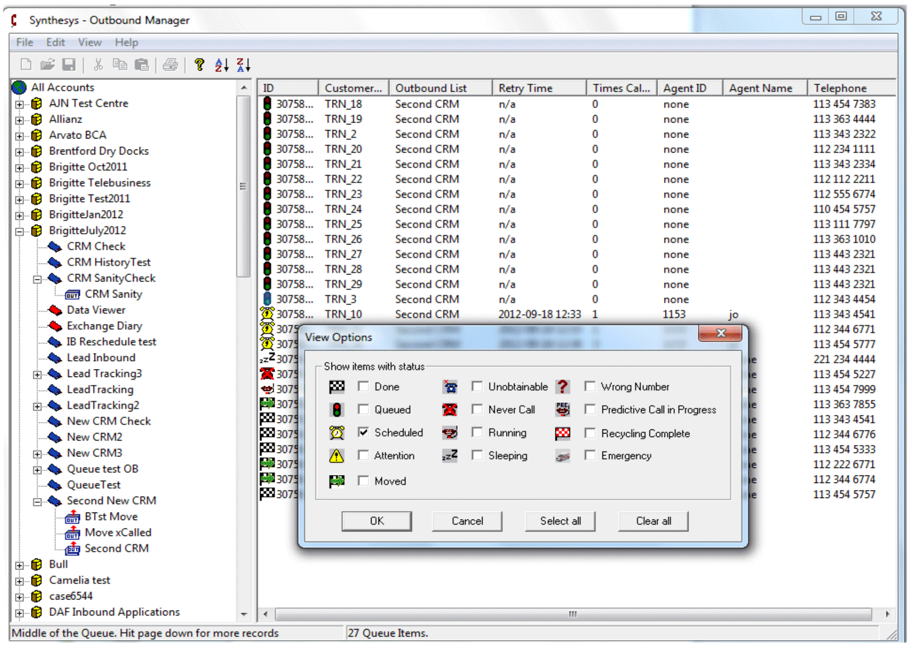
7	O/B calls have been done/ completed
13	O/B calls are queued
5	O/B calls have been rescheduled to be taken at a specified time
1	O/B call is set for attention of the supervisor
8	O/B calls have sleeping status, to be taken at a specified time
34	Total number of O/B calls currently in the queue

Setting a Filter

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

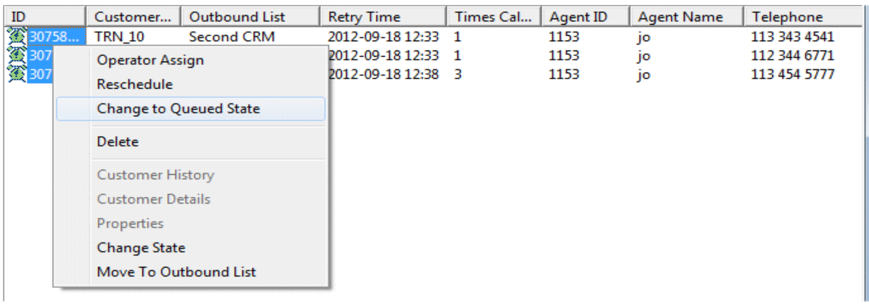
- To show all queued items, click the ‘Select all‘ tab and then OK.
- To start a new selection, click ‘Clear all’, before ticking the required status.

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



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

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



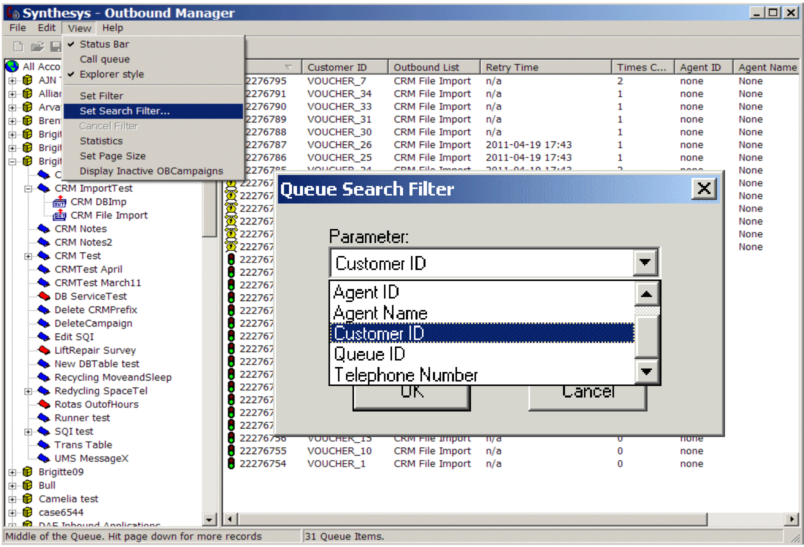
To search for a specific Customer ID, Telephone Number, Agent ID, Agent Name or Queue ID, use the **Set Search Filter** option described on the next page.

Set Search Filter

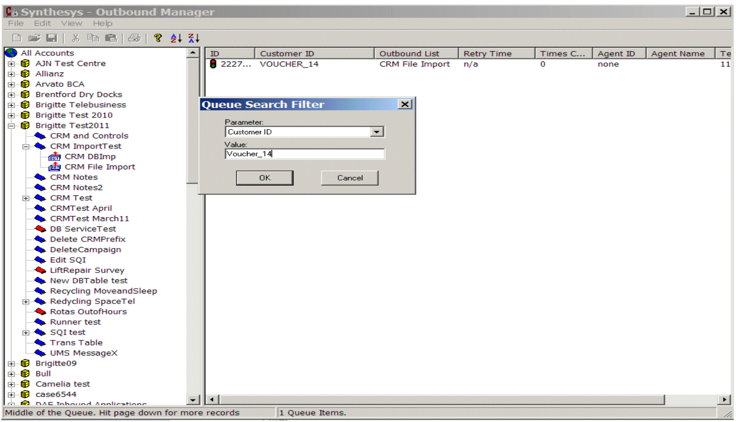
The Set Search Filter option is used to carry out searches based on ‘Customer ID’, ‘Telephone Number’, ‘Agent ID’, ‘Agent Name’ or ‘Queue ID’.

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

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



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



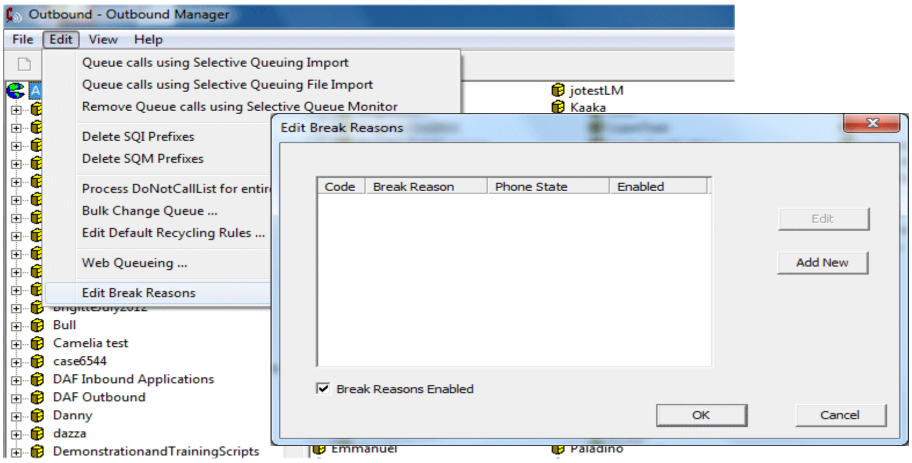
Go to ***View*** on the menu bar and select ***Cancel Filter,*** to display all queued items again.

EDIT BREAK REASONS

The ***Edit Break Reasons*** option in the **Outbound Manager** allows users to add and edit reasons for going on a break. These reasons will be stored in the 'Phoenix_BreakReason' table and can be selected by agents when taking calls, by clicking the ***Break*** icon on the *Telephony* toolbar.

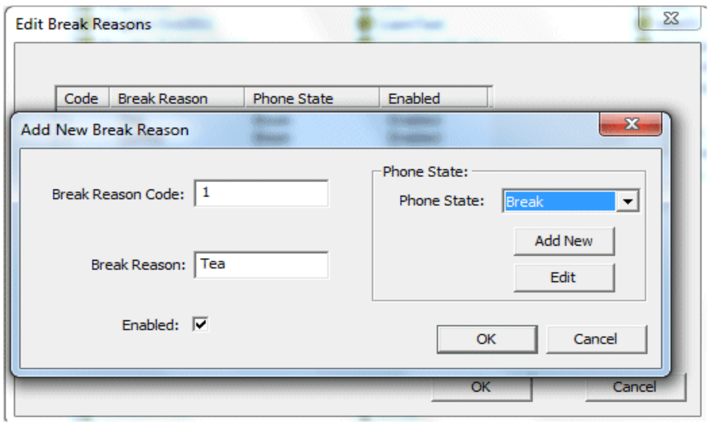
To add new break reasons

- Open the Synthesys Outbound Manager.
- Go to **Edit** on the menu bar and select **Edit Break Reasons.**



In the **Edit Break Reasons** dialog click **Add New**, to enter new break reasons.

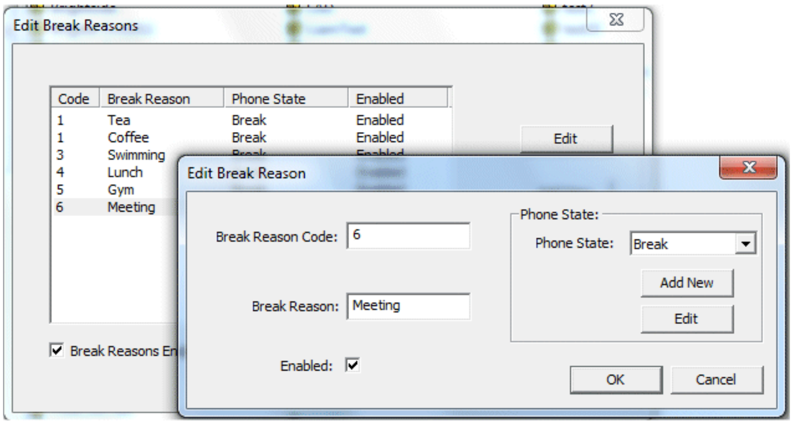
- Enter the ID/ code (as used by your Telephony Switch) for the first reason, into the **Break Reason Code** field.
- Enter the reason for the break into the **Break Reason** field.
- Tick the **Enable** box to display the reaon and allow selection at run time.
- Select or enter the **Phone State** (to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



- Click OK to save the changes.

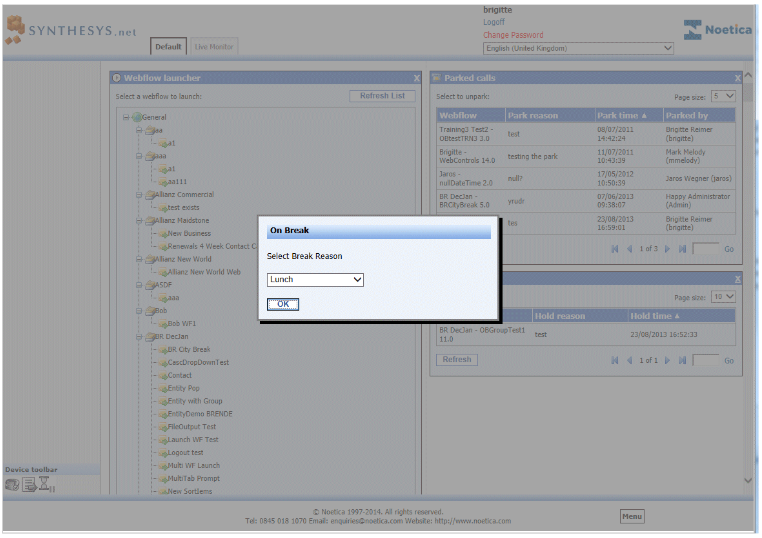
To change information of existing break reasons

- Select the break reason that you wish to edit and click the **Edit** button.
- In the *Edit Break Reason* dialog now displed, update the relevant fields, as required.
- Click OK to save the changes.

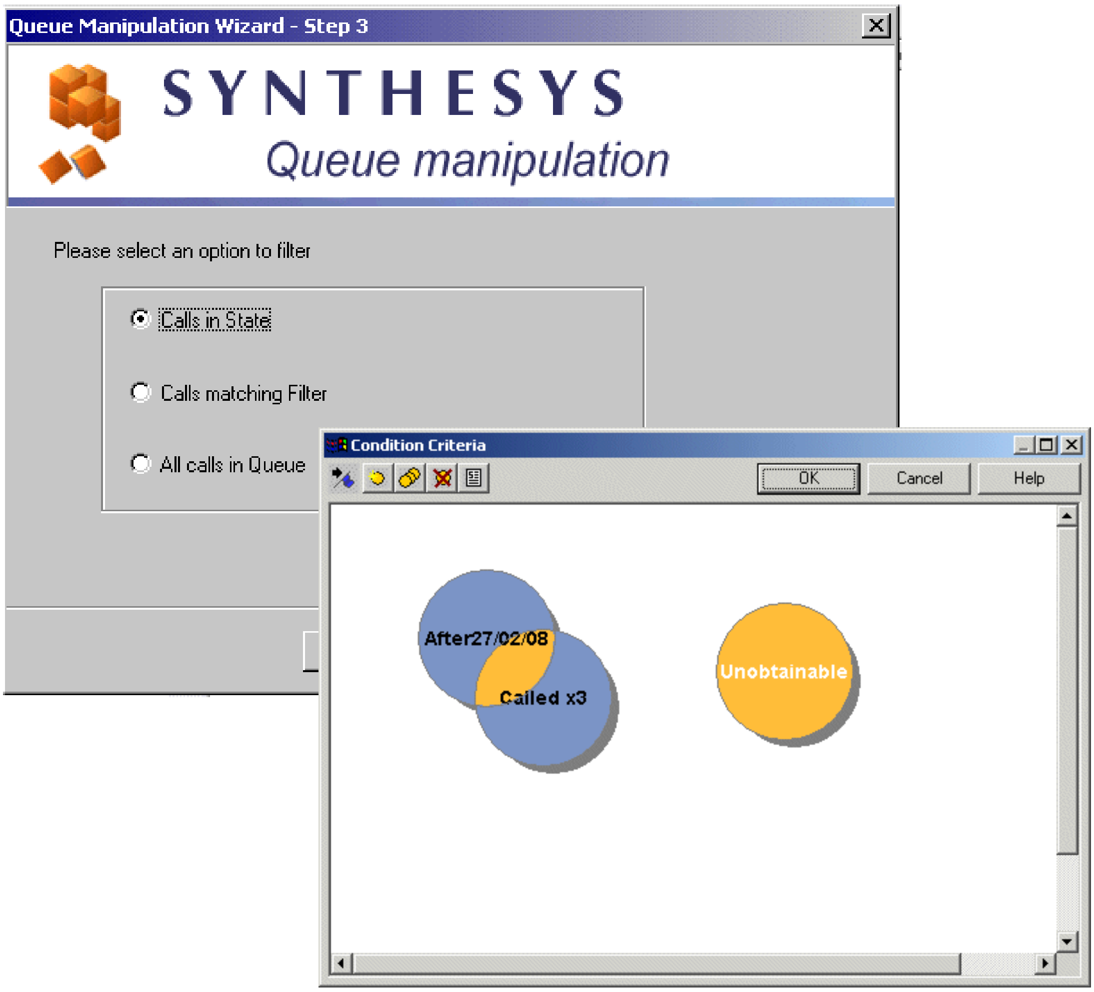


*If the message: Failed to save 'break reasons enabled' to synthesys.inf is displayed when ticking/ un-ticking the **Break Reasons Enabled** checkbox, please ask someone from your IT department with full system administration rights to enable or disable the break reasons.*

At run time, when clicking the **Break** icon on the *Telephony* toolbar, the added break reasons can be selected from a drop down list.



THE QUEUE MANIPULATION WIZARD



THE QUEUE MANIPULATION WIZARD

INTRODUCTION

The *Queue Manipulation Wizard* is used either to do global manipulations on a queue i.e. effecting all items queued, or to manipulate the queue of a selected Outbound list only.

Global Queue Manipulation 

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

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

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

Manipulation on Outbound list level only 

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

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

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

Scheduling a Queue Manipulation Action

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

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

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

Opening the Queue Manipulation Wizard

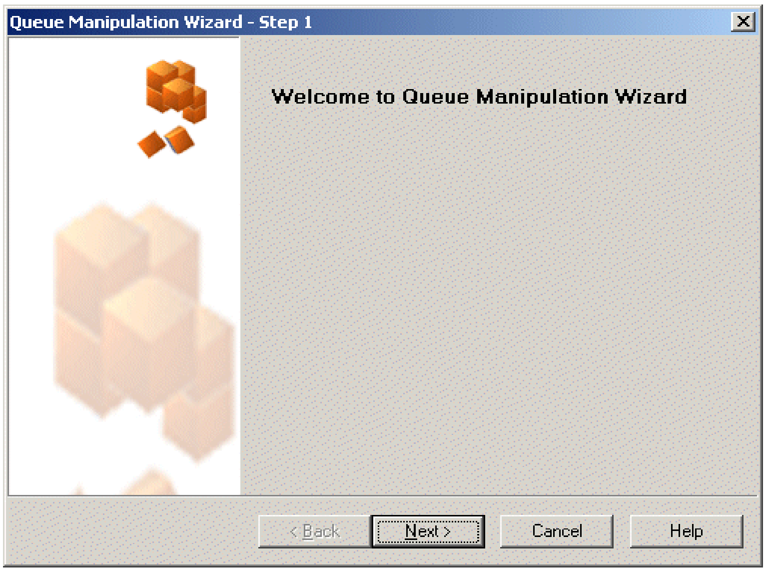
The *Queue Manipulation Wizard* is used to manipulate queued items of an outbound list*:*

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab and in the Launch Applications screen select ***Outbound.***
- Select the required Outbound list and go to **Edit** on the menu bar.
- Select ***Bulk Change Queue*** to open the Queue Manipulation Wizard.

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

Queue Manipulation Wizard Welcome Screen

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



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

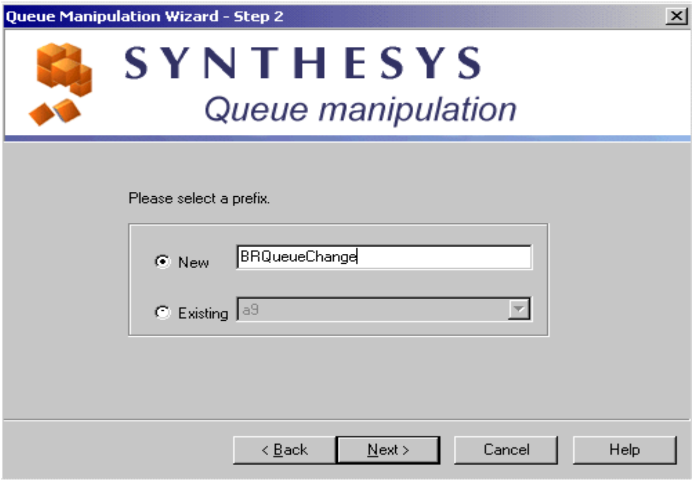
Entering a Prefix or Name

To start your queue manipulation action:

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

Or

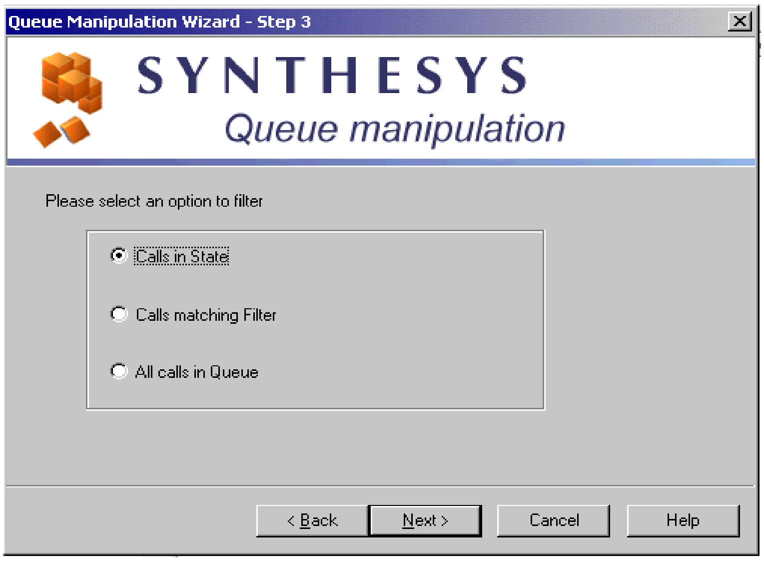
- Select an **Existing name** from the drop down menu.



Available Options

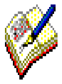
In the next page of the *Queue Manipulation Wizard*, select the required options:

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



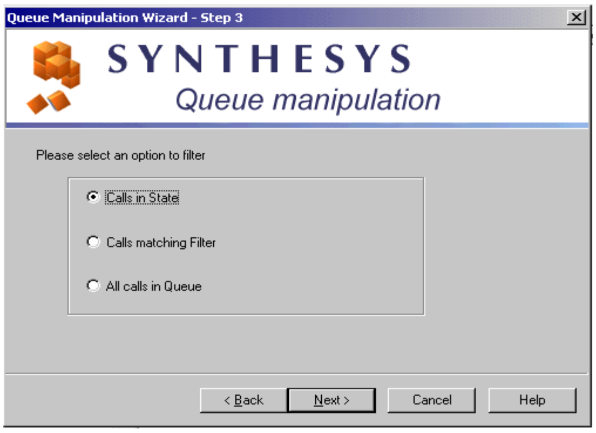
OPTION 1: CALLS IN STATE

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



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

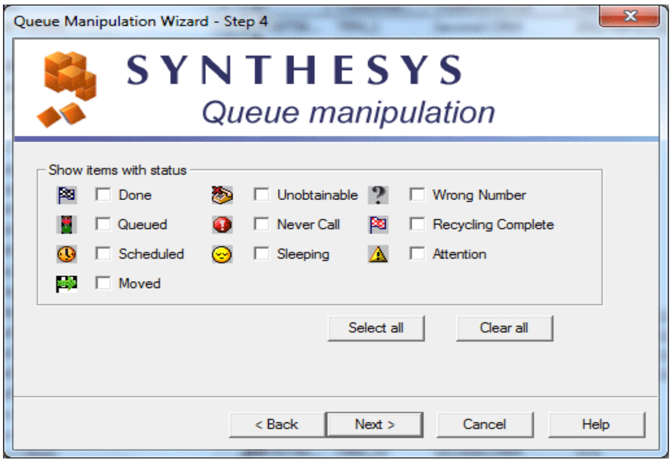
Only select All Accounts before opening the Queue Manipulation Wizard if you wish to manipulate queued items for all accounts.



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

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

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



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

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

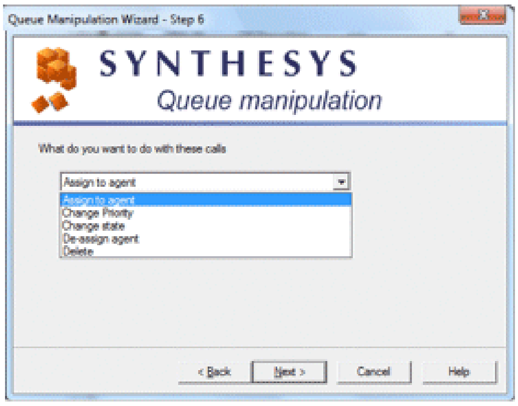
Assign to Agent

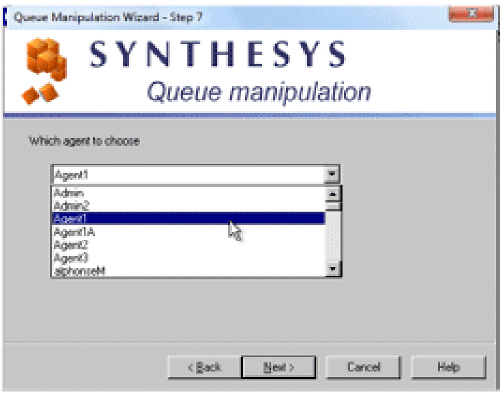
The ***Assign to Agent*** option allows you to assign ***rescheduled and sleeping*** calls to a particular agent.

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

In the *Next>* page of the wizard

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





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

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

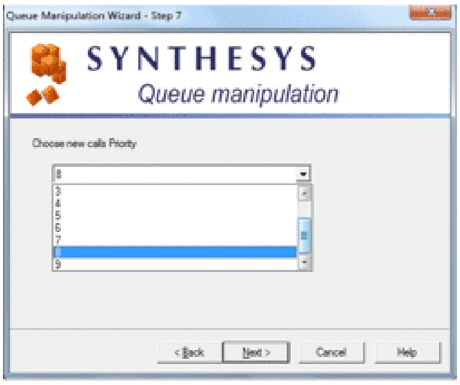
To change details, if required, click the ***<Back*** button. To process the action click ***Finish,*** to abandon the action without saving any changes click ***Cancel.***

Change Priority

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

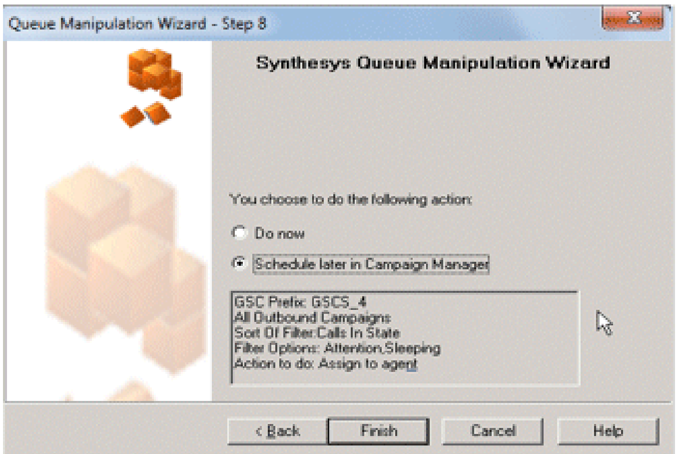
Having defined the records or outcomes concerned in Step 4 of the Queue Manipulation wizard

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



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

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

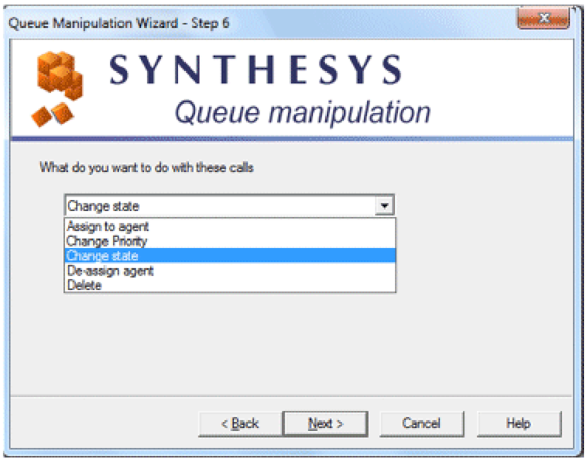


- To change details click ***<Back***.
- To save the changes, click **Finish.**
- To abandon the action without saving changes, click ***Cancel***.

Change State

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

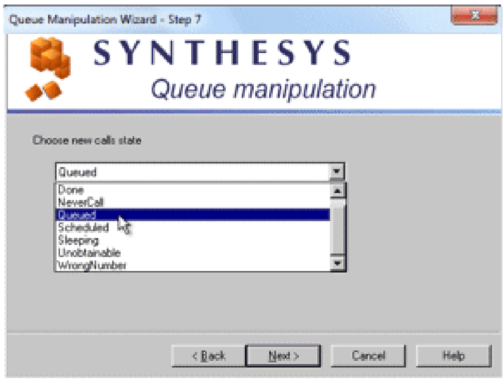
Options include ***Assign to agent*** (only sleeping & rescheduled outcomes), ***Change State, De-assign agent, or Delete***.

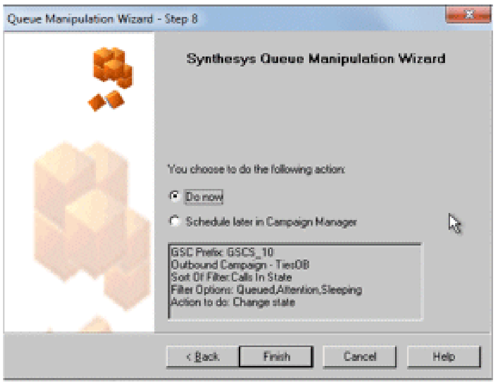


Having selected the ***Change State*** option, the next dialog will show the associated outcomes that can be selected.

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

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

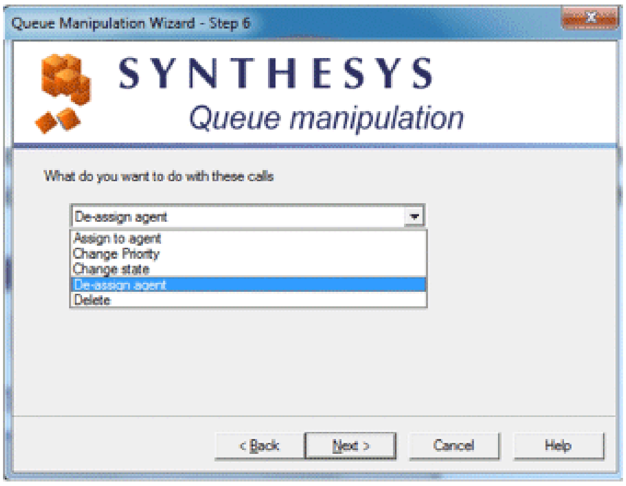




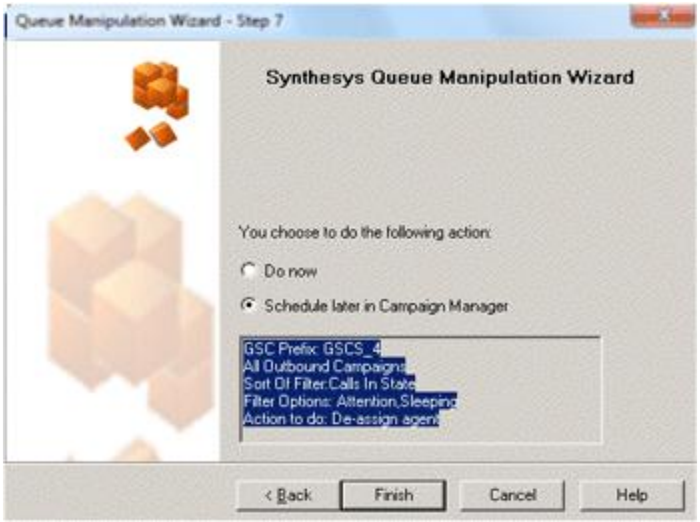
- To change details, if required, click the ***<Back*** button.
- To process the action, click ***Finish,*** to abandon the action without saving any changes, click ***Cancel.***

De-assign and Delete Options

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



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

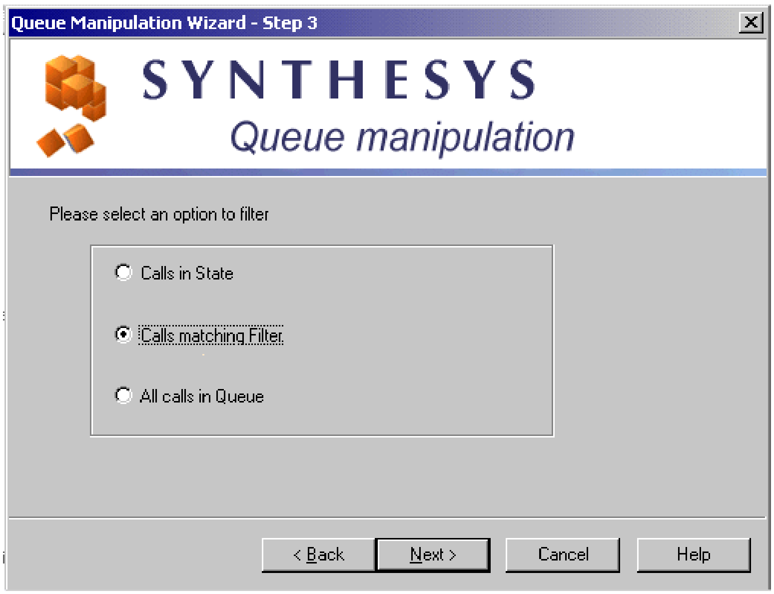


Users can manipulate the queue immediately, or create a GSCScheduler report in the Synthesys Campaign Manager, described in the section **Scheduling Bulk Queue Change**.

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

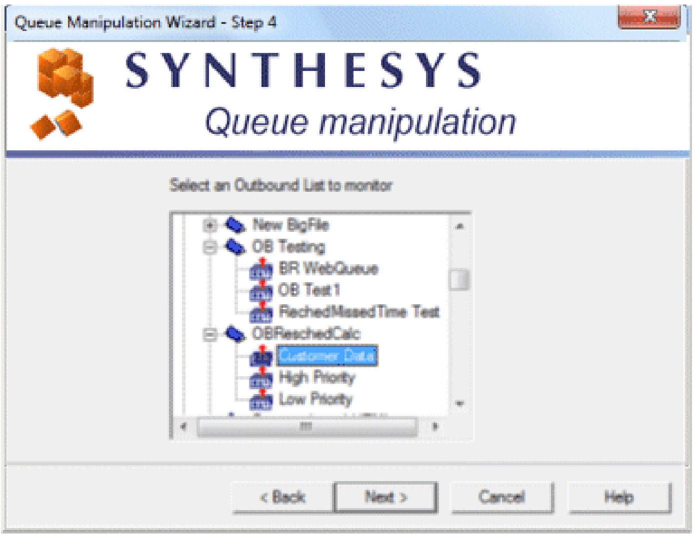
OPTION 2: CALLS MATCHING FILTER

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



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

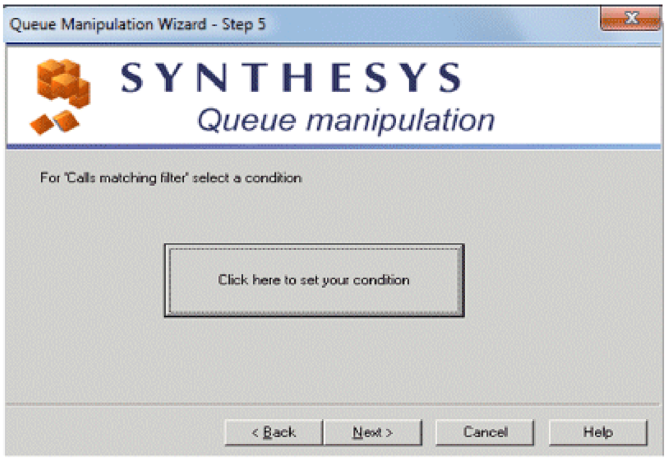
If an Outbound list has already been selected, the wizard will skip this step.



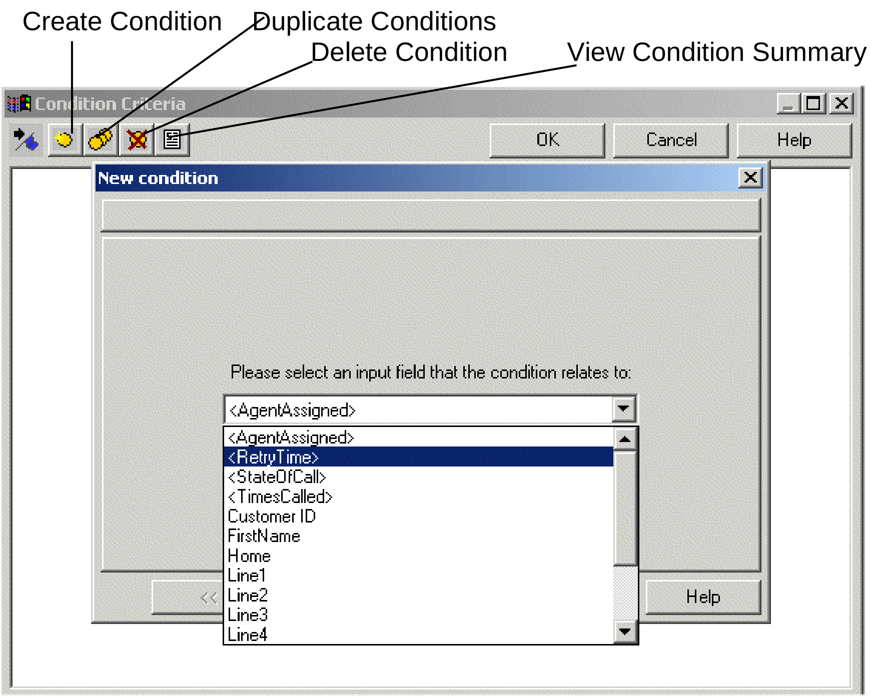
Move to the Next> page of the *Queue Manipulation Wizard,* to define the required selection criteria.

Defining Conditions

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



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

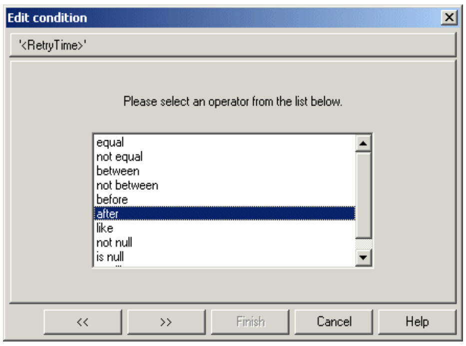


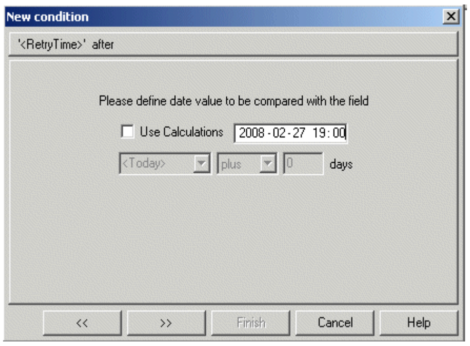
When using the Move to Outbound list option, all moved calls, regardless of their current queue state, will be queued and displayed in the target Outbound list as freshly queued calls, with the number of times called set back to 0.

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

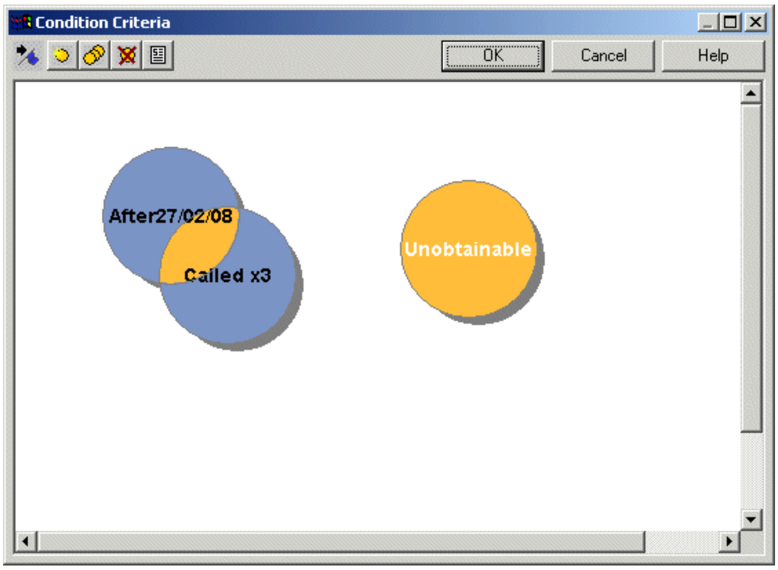
To create a new condition:

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





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



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

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

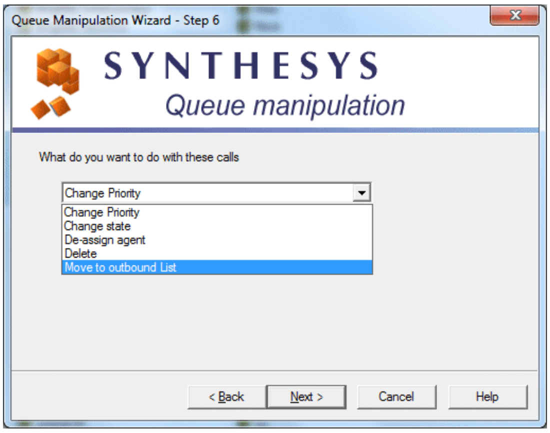
Any discs that *overlap* with one or more other discs will *imply a Boolean 'AND'* to operate between the conditions. For example:
(<RetryTime>'after' '2008 02 27 19:00' AND Times called =3) OR (Result = Unobtainable)

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

Defining Actions

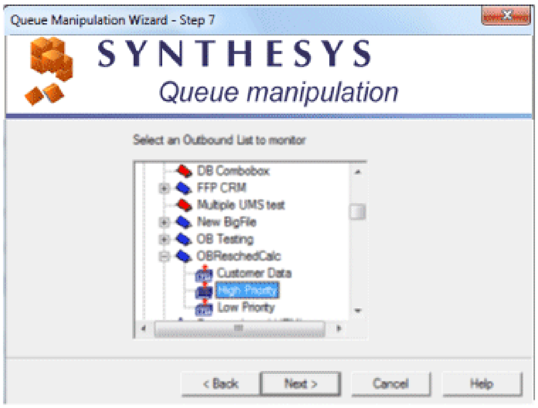
From the options displayed, choose what to do with the filtered queued items, e.g. ***Move to Outbound List***.

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



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

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



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

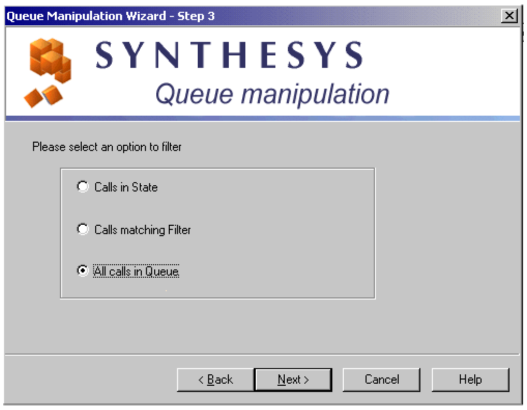
Click *Finish* to process the action.

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

OPTION 3: ALL CALLS IN QUEUE

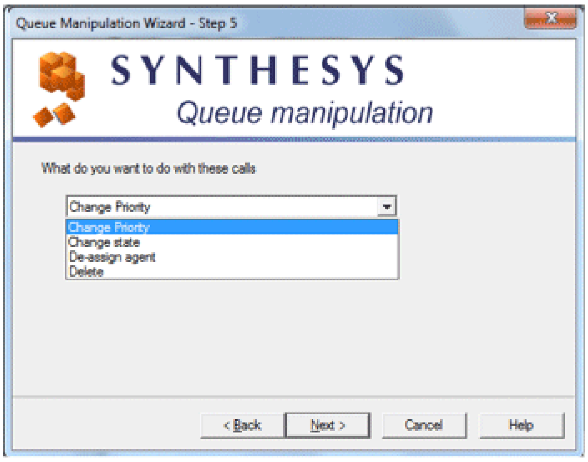
The option ***All calls in Queue*** is used to manipulate the state of queued items for all accounts or for a *selected Outbound List* only.

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



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

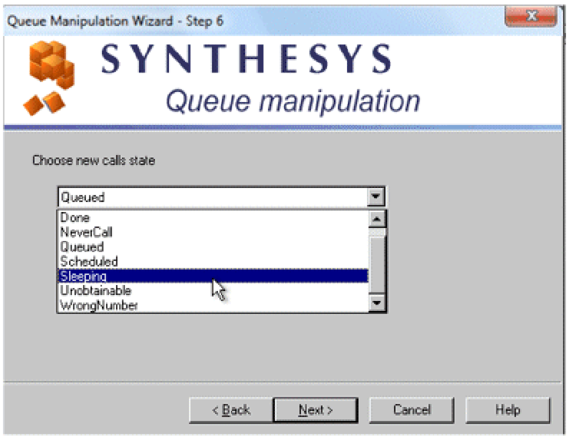
Following the selection of all or a specific Outbound list, move to the next step of the wizard, to specify the changes that you wish to make. Options include Change Priority, Change state, De-assign agent and Delete.



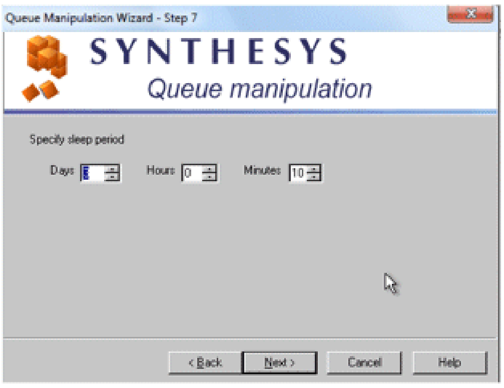
If either the option ***De-assign agent*** or ***Delete*** is selected*, Next>* will move you directly to the final page of the wizard, displaying a summary of the action about to be taken.

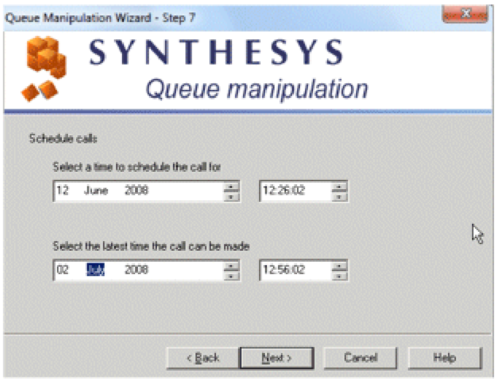
Check the details to ensure that the summary reflects your requirements, before clicking *Finish* to process the action.

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



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





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

Either manipulate the queue immediately,

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

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

SCHEDULING BULK QUEUE CHANGE

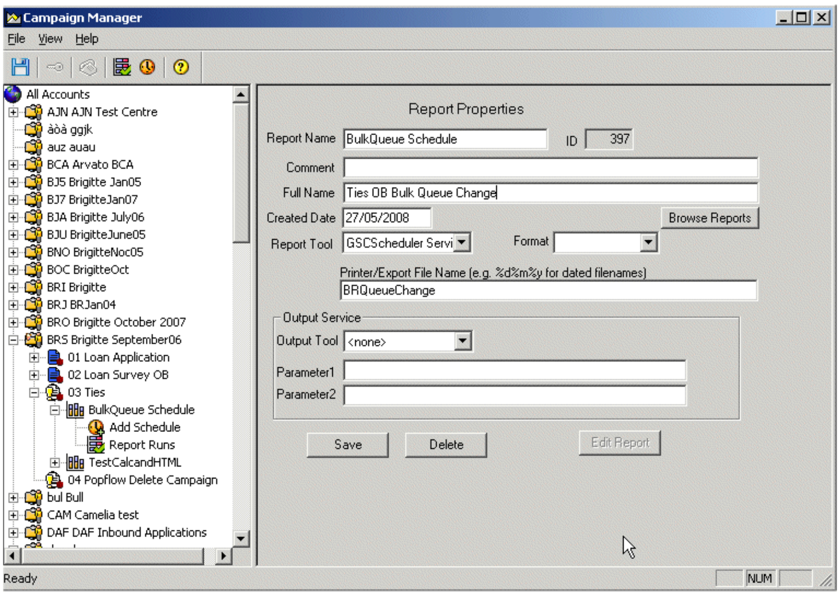
To action the Outbound bulk queue change via the '***Schedule later in the Campaign Manager'*** option, a new report and report schedule must be set up in the Synthesys the Campaign Manager.

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab and in the Launch Applications screen select ***Reports,*** to open the Synthesys Campaign Manager.

Adding a GSCScheduler Report

In the Campaign Manager, locate and right click on the relevant campaign and select 'Add New Report'.

- Enter the report name, any comments as required and type a name into the 'Full Name' field.
- Select 'GSCScheduler Service' (Global State Changer Scheduler) in the Report Tool field.
- Next, type the name or prefix as entered in Step 2 of the Queue Manipulation Wizard (for example BRQueueChange), into the Printer/Export File Name field, before saving your report.



Into the Printer/Export File Name field, enter the name or prefix as entered in Step 2 of the Queue Manipulation Wizard, when creating the conditions for the bulk queue change.

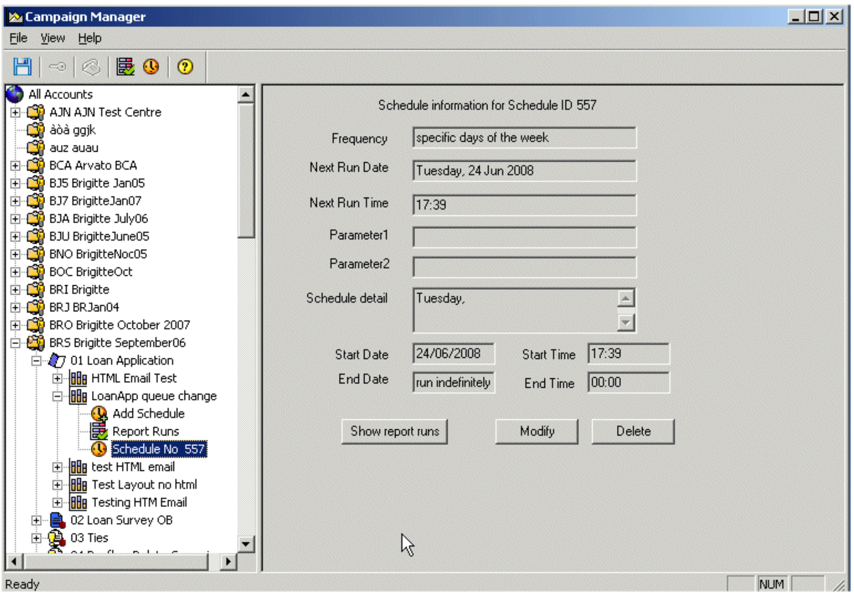
Next, set up the report schedule.

Scheduling a GSCScheduler Report

To add a schedule for the GSC report

- Select **'Add Schedule'**, and using the Schedule Wizard, enter details regarding date and time of your report runs.
- 'Save' the schedule for your report.

In our example, the report will run every Tuesday at 17.39pm.



To check that your GSC report has run successfully

- Go to 'Report Runs' or alternatively check the queue in the Outbound Manager.

For further information regarding setting up reports and schedules, please consult the 'Creating and Managing Reports' manual.

Noetica

SYNTHESYS
QUEUE MONITOR

SYNTHESYS QUEUE MONITOR

INTRODUCTION

The **Synthesys Queue Monitor** allows for calls to be removed from the queue of a selected Outbound list, if predefined conditions apply. Associated information will be added to the CRM history.

Note: Only calls with call status ‘queued’, ‘sleeping’ and ‘rescheduled’ will be removed from the queue.

The Synthesys Queue Monitor provides a step-by-step guide through the various actions required.

Users determine the data source, plus the table and columns within that data source and then, using fields from the Synthesys CRM table, define the selection criteria to specify which calls are to be removed from the Outbound queue.

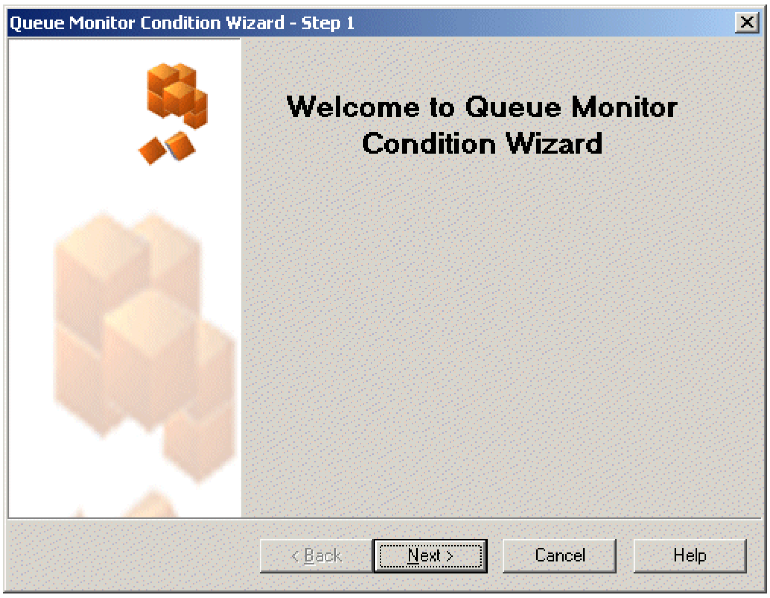
Users can furthermore decide whether to run the call remove process immediately or at a later stage, creating a SQM report and a schedule for the report run in the Campaign Manager.

NOTE: The Synthesys Queue Monitor (SQM) is not a standard feature but needs to be purchased separately.

Opening the Queue Monitor ("SQM")

To open the Queue Monitor

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab and in the Launch Applications screen select ***Outbound.***
- Select the required Outbound list and go to **Edit** on the menu bar.
- Select **Remove Queue calls using Selective Queue Monitor** to open the Queue Monitor.



The following pages provide a step-by-step guide to the Synthesys Queue Monitor Wizard.

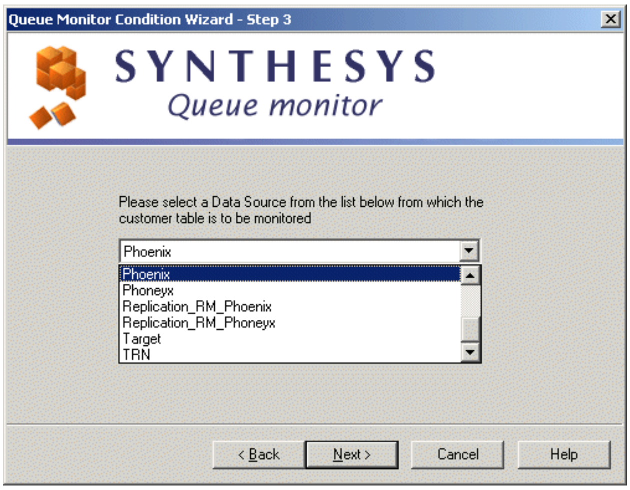
Part 1: Data Source & Table Columns

The first part of the wizard will determine which data source and which columns in one specific table or view from that data source are to be used for the de-queue process.

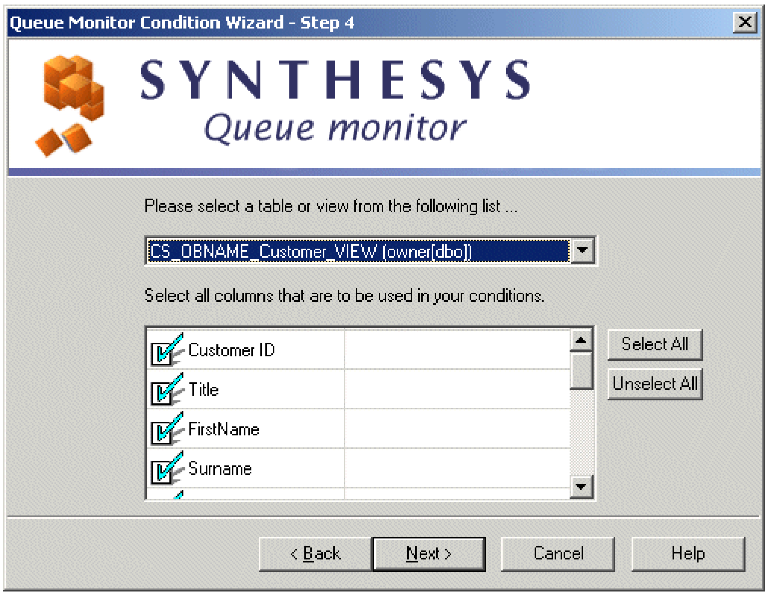
Step 2: To begin with, either enter a **‘New’ name** for your SQM report **or** select an **existing SQM name** from the drop down menu.

Click the ‘Next’ tab to continue to the next page of the wizard.

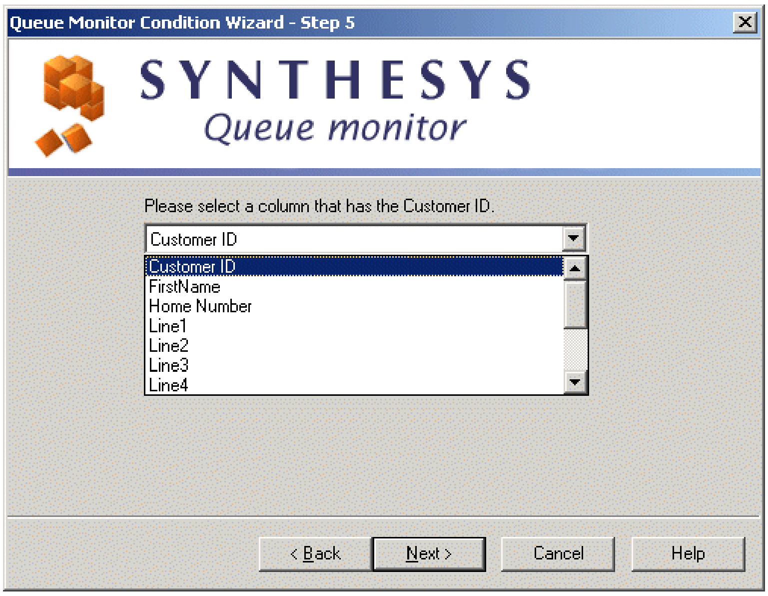
Step 3: Next, select the required data source from a list of all ODBC data sources available on the system.



Step 4: The next step involves the selection of one table or view from the selected data source, and the columns from that table/view to be used for the de-queue process.



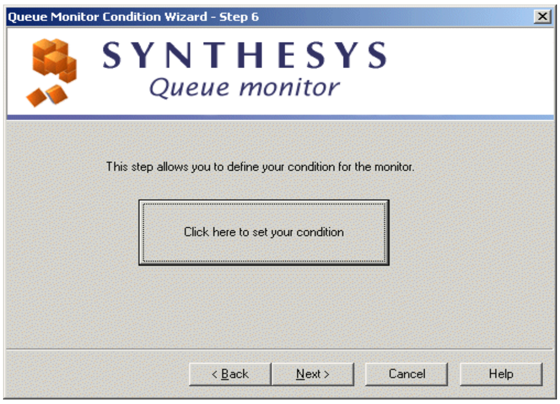
Step 5: Now, select a column that contains the Customer ID.



Part 2: Remove from Queue Selection Criteria

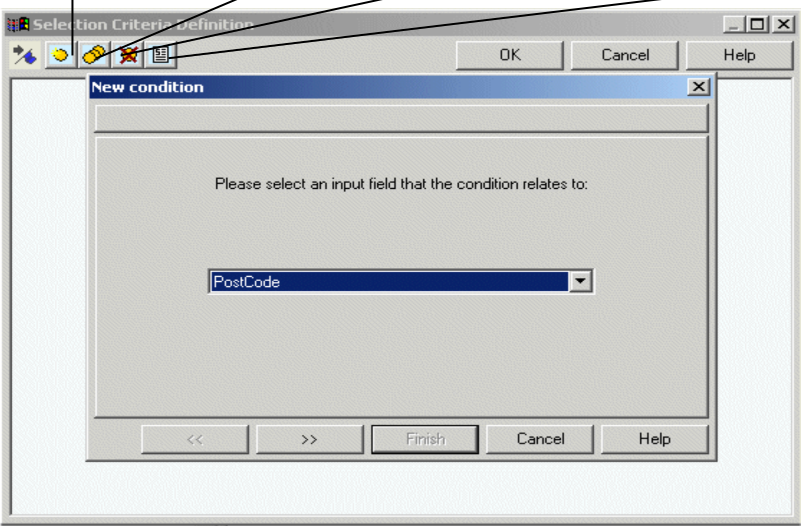
Step 6: Click the ‘Selection Criteria’ button, to open the ‘Selection Criteria Definition’ screen. Here you can specify, which calls to remove from the Outbound queue.

Note: Only calls with call status ‘queued’, ‘sleeping’ and ‘rescheduled’ will be removed from the queue.



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

Create Condition   Duplicate Conditions   Delete Condition   View Condition Summary



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

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

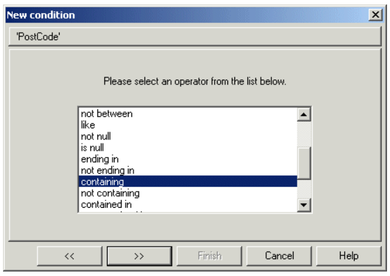
 **‘Delete a condition’.** Click on the disc that you wish to delete, and then on the ‘Delete condition’ icon.

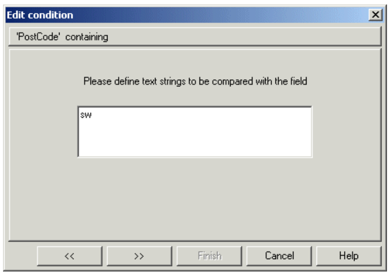
 **‘View condition summary’** click this icon, to view a summary of all conditions.

To open the 'New Condition' window

- Click the **'Create Condition'**  icon and select the property according to which you want to define your condition. In our example we have selected 'Postcode.
- Click the  button, to move to the next screen of the wizard.

Now select the required operator, for example, **'containing'** and then enter your condition. In our example we have entered **'SW',** as we wish **to remove** all customers in the **SW area** from the queue of a selected Outbound list.



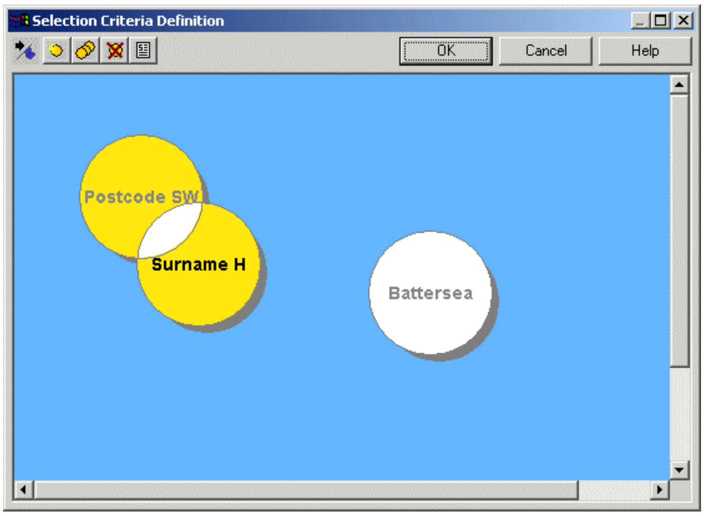


In the window subsequently displayed

- Enter a descriptive name for your condition, i.e. **'Postcode SW'**, then click 'Finish'.

The condition defined will now appear as a free-floating green disc on the canvas.

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



Ungroup discs, by clicking on the non-intersecting part of a disc, dragging it away.

If 2 discs are overlaid completely, press CONTROL on the keyboard to drag them apart.

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

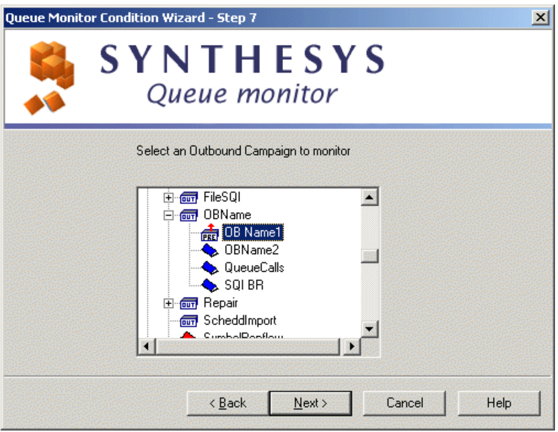
Any discs that overlap with one or more other discs will imply a Boolean 'AND' to operate between the conditions. In our example, customers are to be removed from the queue if: (Postcode SW **AND** B2) **OR** (if the condition is 'Sale')

Click OK, to return to step 6 of the wizard and then Next, to proceed to the next part.

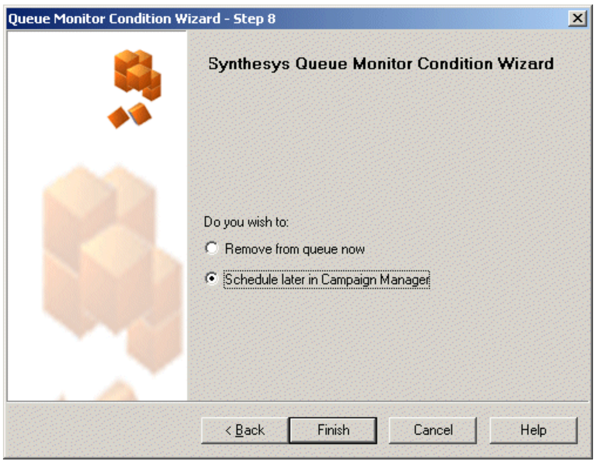
Part 3: Removing Queued Customers

You now need to select the Outbound list from which you want to remove the queued customers and decide whether to run the data de-queue process immediately or at a later stage, creating a SQM report and schedule in the Campaign Manager.

Step 7: Select the Outbound list from which you want to remove the customers from the Outbound queue.



Step 8: Next, decide if you want to run the data de-queue process immediately or if you want to schedule a SQM report later in the Campaign Manager.



- Tick ‘Remove from queue now’: If you want to remove the customers queued from the Outbound queue immediately.
- Tick ‘Schedule later in Campaign Manager’, to remove the customers from the Outbound queue at a later stage, with a scheduled report set up in the Campaign Manager.

Please see the next section on ‘Schedule a SQM Import in Campaign Manager’ for information about setting up and scheduling a SQM report.

Schedule a SQM Report in Campaign Manager

If the option '**Schedule later in the Campaign Manager**' has been selected, go to the Synthesys Campaign Manager and create a scheduled SQM report to remove selected customers from the Outbound queue.

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab and in the Launch Applications screen select ***Reports,*** to open the Synthesys Campaign Manager.

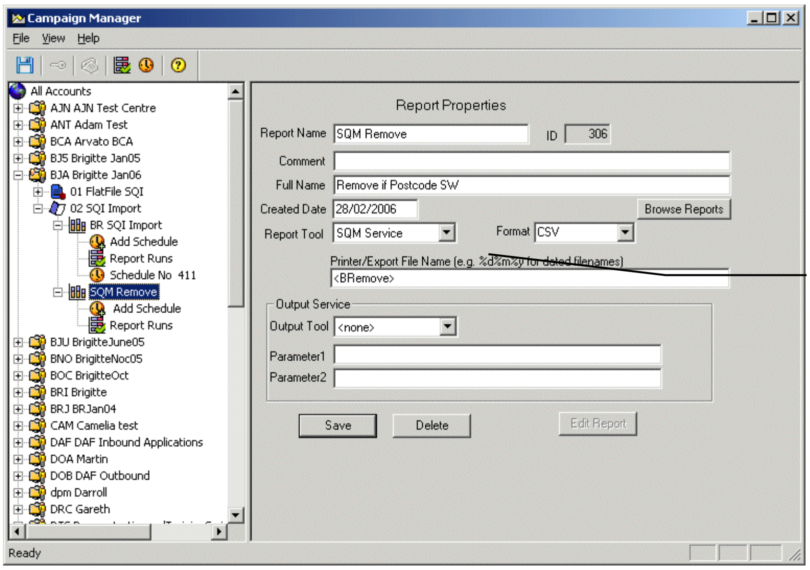
Setting up a SQM Report

In the Campaign Manager

- Locate and right click on your campaign and select '**Add Report'**.
- Enter the **Report Name**, any comments as required and a full report name (or 'None') into the 'Full Name' field.
- Select 'SQM Service' in the Report Tool field.

Next, type in brackets (< >) the name of your SQM, as entered in Step2 of the Queue Monitor wizard, into the Printer/Export File Name field:

i.e. **<BRemove>.** Save your SQM report.



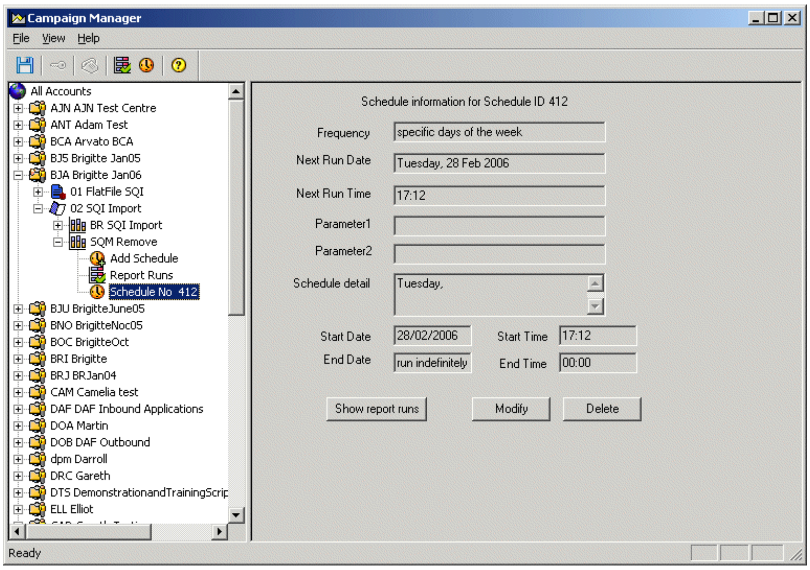
Into the Printer/Export File Name field, type in brackets (< >) the SQM name, as entered in Step2 of the Queue Monitor wizard: < BRemove>.

Scheduling a SQM Report

To add a schedule for your SQM report

- Select **'Add Schedule'**, tick the **'Frequency'**, i.e. 'Daily' and enter the time for the report run in the 'Start Time' field.

Save the schedule for your SQM report.



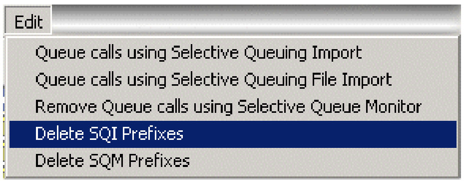
In our example, the SQM report will run Tuesdays at 17.12pm, removing calls from the Outbound queue.

To check that your SQM report has run successfully

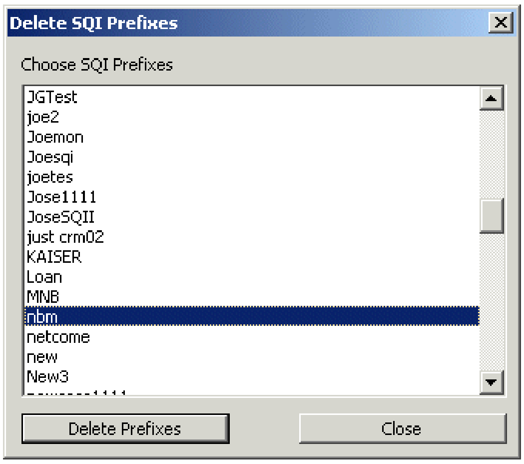
- Go to 'Report Runs' or alternatively check the queue in the Outbound Manager.

DELETING SQI AND SQM PREFIXES

The function to delete SQI or SQM prefixes has been added to the Edit menu in the Outbound Manager.



From a dialog listing either all SQI or SQM prefixes, users can select one or more prefixes for deletion.

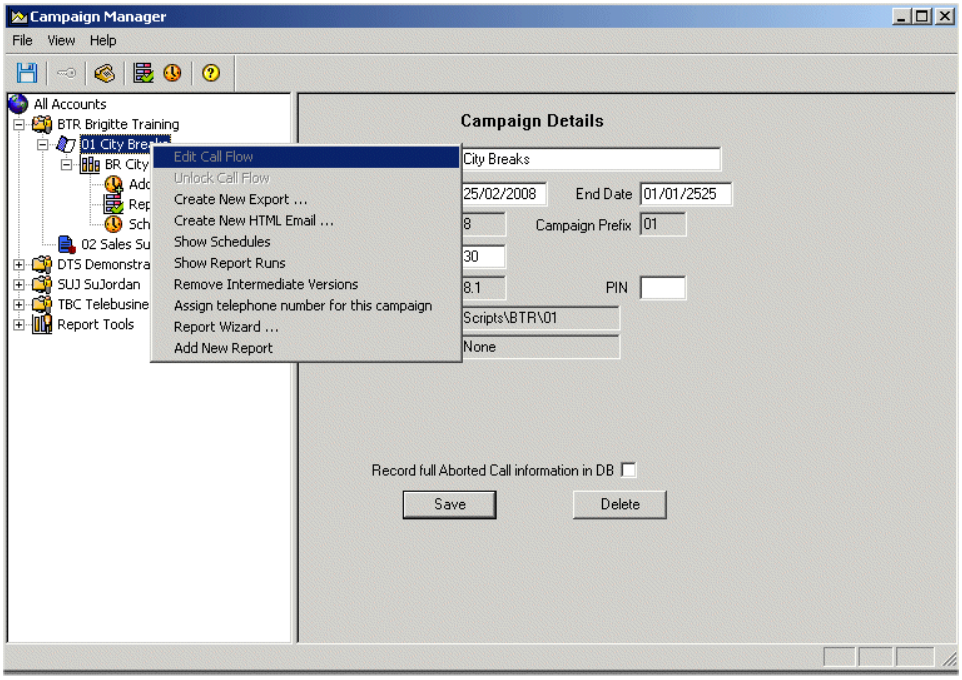


Prefixes can only be deleted, if no live schedules are assigned for the selected SQI or SQM prefixes.

If schedules exit, they will have to be removed first and the delete request is ignored.

REPORTS

The Synthesys Campaign Manager



REPORTS

INTRODUCTION

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

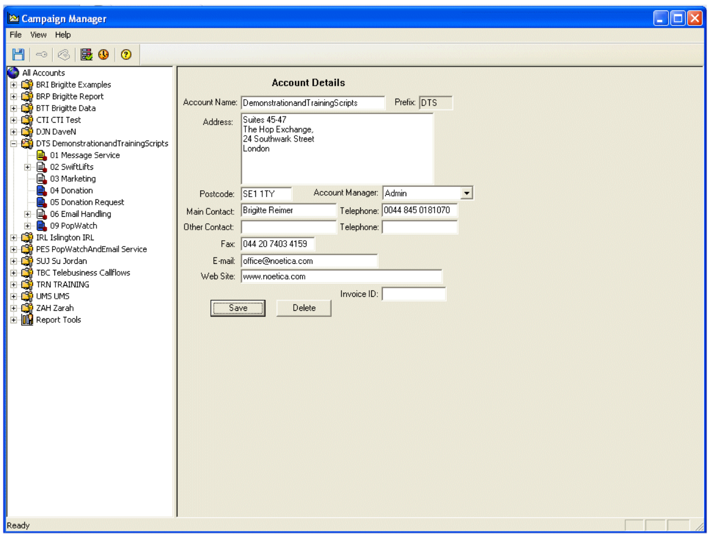
In the Campaign Manager you can rename and delete CRM accounts & campaigns, reset sessions, add and schedule reports and view report run histories and delete reports and report schedules.

To start the Campaign Manager

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab and in the Launch Applications screen select ***Reports.***

Account View

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

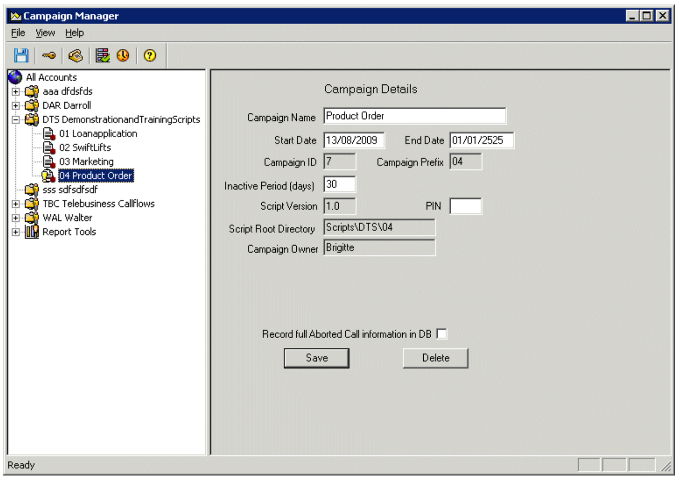


Any of the fields that are not greyed out may be edited and saved.

New Accounts and CRM campaigns are created in the CRM Editor and are displayed in the Campaign Manager only after they have been released in the CRM Editor.

Campaign View

Expanding the account displays a list of the CRM campaigns for this account. Select one of the campaigns, to views details of the campaign in the right hand pane:

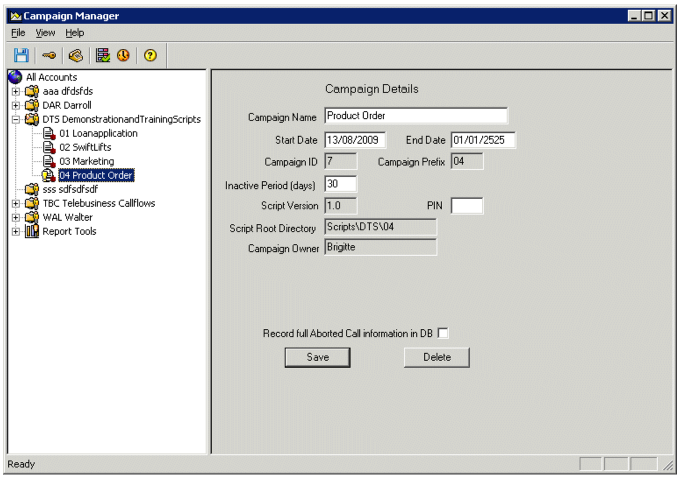


You can ignore the Inactive Period setting, as this is not used in the current version of the Synthesys Dialler Platform.

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.



Put your cursor into the Account or Campaign Name field and edit as required

Click SAVE to commit the changes and to display the new name for your account or campaign on the left-hand side of the Campaign Manager.

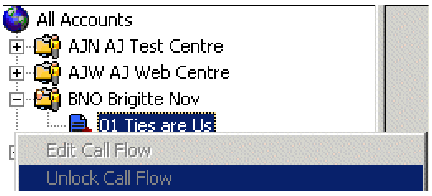
Re-Setting A Synthesys Session

If you exit from the *Synthesys CRM 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 and **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 agents, automatically displaying the appropriate Webflow.

When using the Synthesys Dialler Platform together with Synthesys. the DDI (Direct Dial In) details are added, modified and deleted in the Synthesys Management Studio.

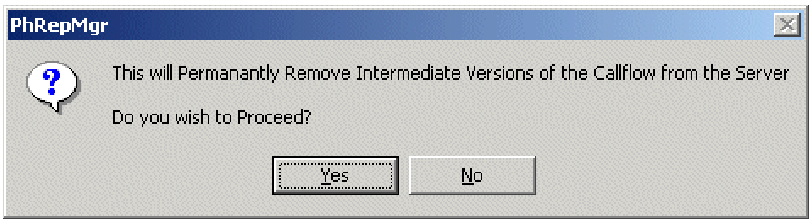
For more information please see the section DDI Maintenance in the Synthesys manual.

Remove Intermediate Versions

In the Campaign Manager interim versions of CRM campaigns can be deleted.

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

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

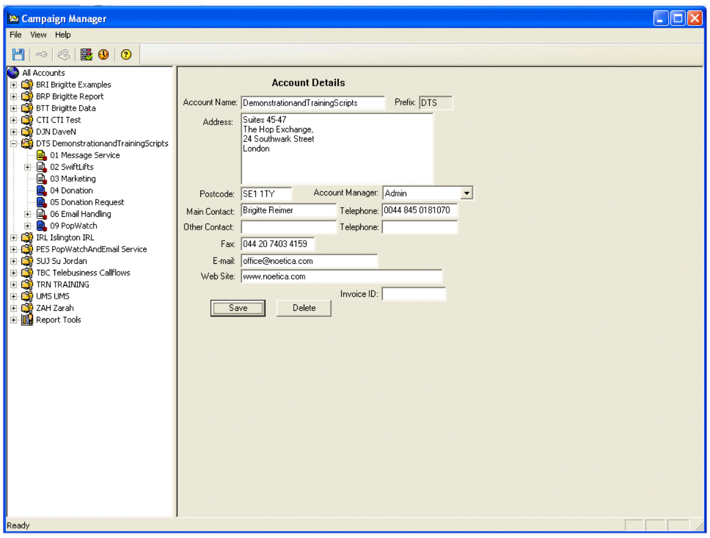


To go ahead click *Yes*, to cancel the action click *No.*

Deleting Accounts

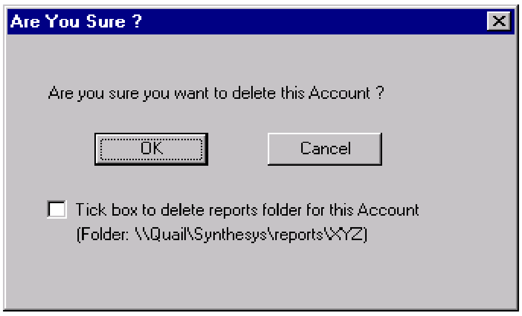
To delete Accounts or CRM campaigns

- Expand the 'All Accounts' icon in the Campaign Manager and select the account or campaign you want to delete.
- To delete your Accounts or Campaigns click the DELETE button.



Before an Account can be deleted from Synthesys, you must first of all delete all campaigns listed under that account. A message will pop-up reminding you that there are campaigns attached to this Account, which need to be deleted first. The Account will not be deleted.

When all Campaigns have been deleted for the Account, pressing the 'Delete' button will display the following message:



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

Pressing 'OK' will delete the Account.

A message will pop-up informing the user that the Account has been deleted and the icon for the Account will disappear from the Campaign Manager.

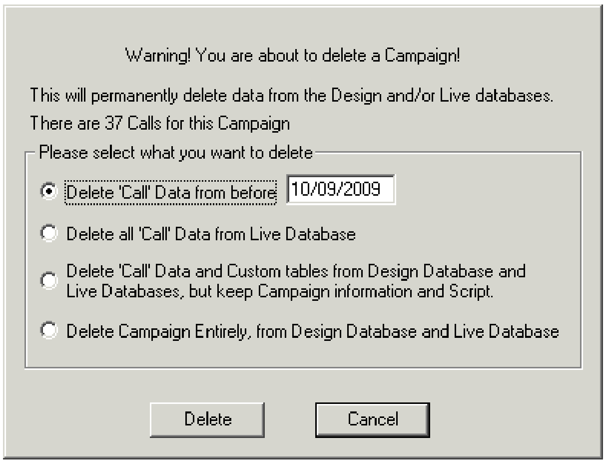
The following takes place when an Account is deleted:

- 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 CRM Campaigns

Select the campaign that you wish to delete and then click the 

button to display a window listing the various options for deleting campaigns:



Campaigns with Outbound lists

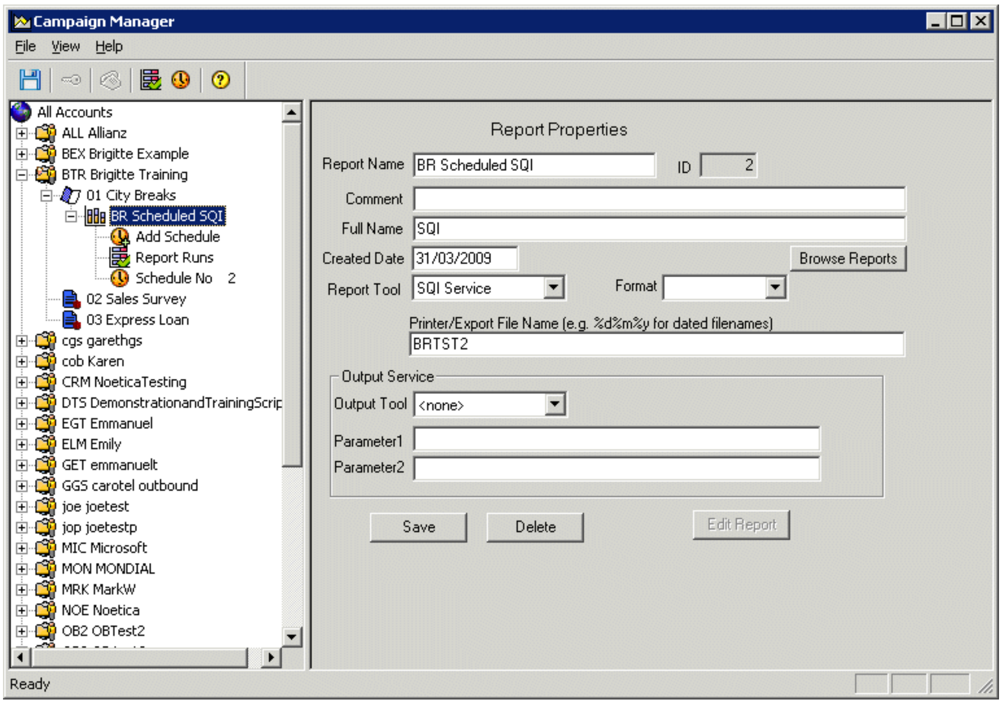
Any Outbound lists that have been set up under the campaign that you wish to delete need to be deleted first in the Outbound Manager.

ADDING REPORTS

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.

The report itself has been designed and saved as a file using the report tool.



A new Campaign will have no reports set up in the Campaign Manager. To add a report, right click on the campaign and either select 'Add New Report' or 'Report Wizard' from the drop down menu.

The available options in the Report Properties dialog are explained on the next page.

Adding New Reports

To use the 'Add New Report' option to display a blank report template, right click on the campaign and select 'Add New Report'. Next, enter all details as required.

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

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

SETTING UP REPORT SCHEDULES

Once all report details have been entered, the Report may be scheduled to run in a number of different ways, or frequencies. **The Schedule Wizard** will guide you through the process of setting up your report schedule. The information saved is used by the Report Service to automatically run and print the report and to re-schedule the report.

NOTE: You can open the Synthesys Schedule Wizard at any time from the Campaign Manager, using the 'Add Schedule' option.

To set up a schedule immediately, click 'Yes' in the 'Schedule Report now' dialog. Select 'No', if you want to set up the schedule at a later stage.

Setting Schedule Start & End Dates

In the 'Schedule start' Dialog, set a start and finish date for your report run. Select **'Immediately'** to start your report run straight away, or click the **'Starting on'** option and use the arrow, 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, alternatively, 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: This option is not used in the Synthesys Dialler Platform.

Timed Report Runs

Selecting '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 required days, on which you want to run the report, e.g. every Monday, Wednesday and Friday.

Selecting '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. do you want to run the report on the first or last day of the month, or on a specific day?

Passing Parameters to the Report

When setting up schedules it is important to make sure that the schedule type you pick corresponds to the information retrieved in the report itself.

For example, a report scheduled to run once per day should only have data for one day's calls. In the *Parameters* dialog of the Wizard you can select the required parameters from the list or enter your own parameters.

Schedule Summary

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

NOTE: Make sure that the 'Next Run Date' and 'Next RunTime' fields display the date and time that you expect the report to run on next. The exception are Instant Schedules, which will not display a 'Next Run Date or Time' as they can run at any time.

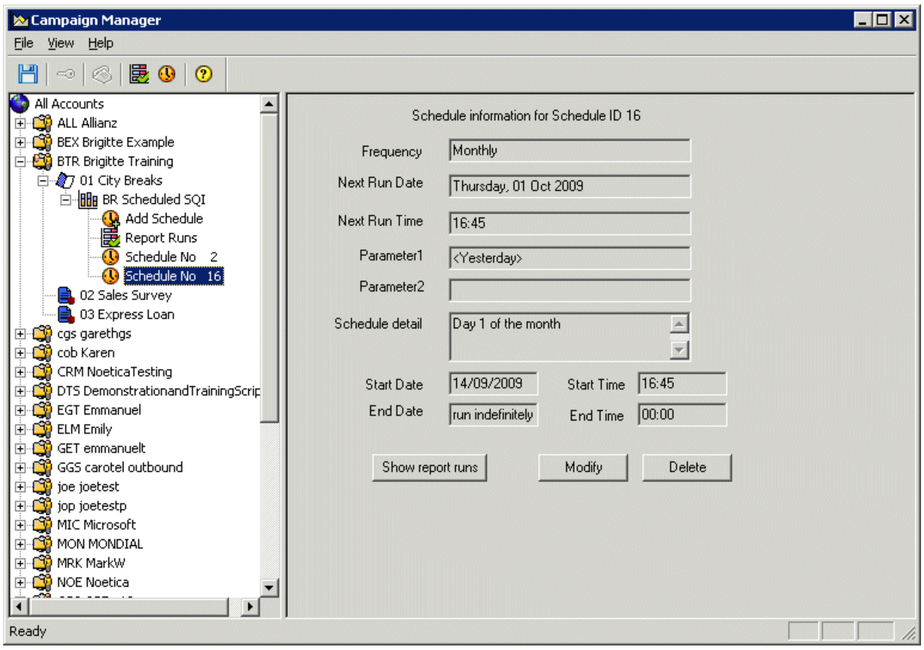
The summary in our example shows a schedule for a monthly report, to be run on the first Thursday at 16:45.

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 to open the Synthesys Schedule Wizard, which will guide you through the process of setting up your new report schedule.



Note: 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. For other reports the next run time will usually be the next day.

Also, ensure that the schedule type you pick corresponds to the information retrieved in the report itself. For example, 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. Note: as with report parameters there are a number of special case parameters, which are converted to values, when the report is run e.g. <Yesterday> is converted to a date. See **Parameters** section.

Report Run List View

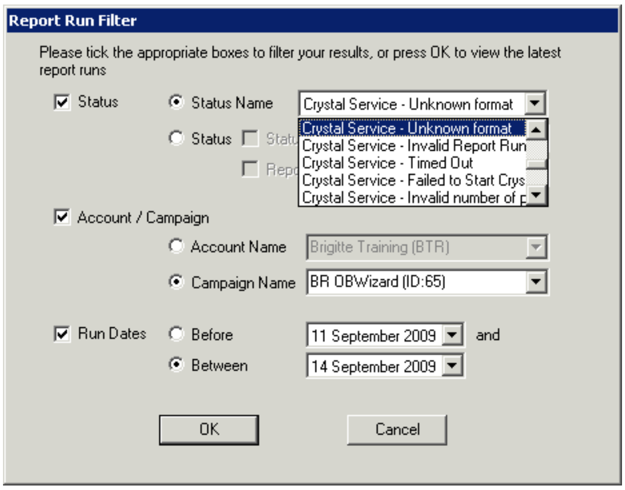
Once a report has been scheduled and has been run by the Report Services, the information about when it ran can be viewed by clicking on the Report-Runs icon. This will display a list of report-runs.

There are two methods for viewing report-runs:

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

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

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

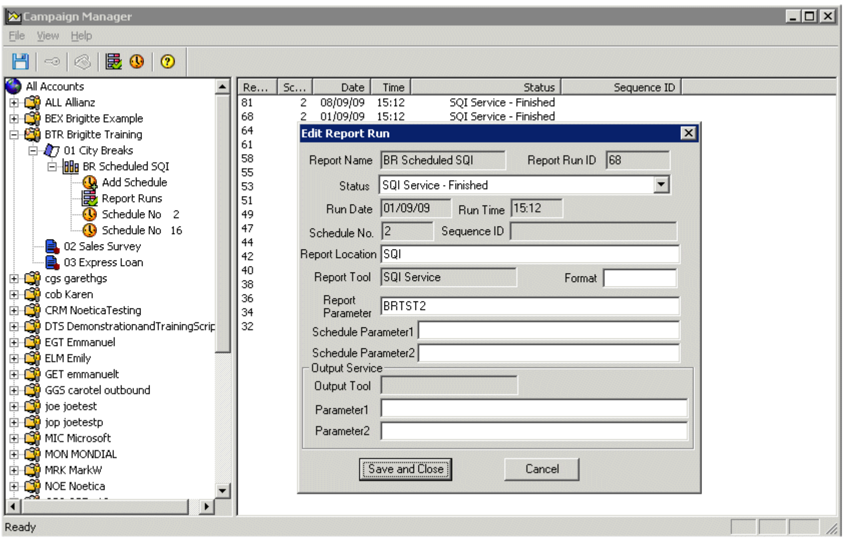


Report Run Maintenance

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

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

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



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

Schedule List View

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

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

Parameters

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

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

Report Services Parameters and Formats

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

<Yesterday>

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

<Today>

The same as above except with today's date.

<Report_Run_ID>

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

<Sequence_ID>

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

<Table.Column:TableName.ColumnName>

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

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

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

For example in Campaign Manager under Parameter2

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

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

% characters

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

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

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.

/Zip

For Zipping Files. If a report produces an 'Output file', it can be automatically Zipped by adding '/Zip' to the Printer/Export Name field. This option is not valid for 'Print' format as no output is produced.

E.g.: in Printer/Export Name of:
D:\synthesys\reports\temp.txt /zip

The above will produce the file D:\synthesys\reports\temp.zip, and the Zip file will contain temp.txt.

E.g.: in Printer/Export Name
Synthesys Tif Printer /zip
The above will produce the file synthesys\spool\impromptu\320.zip, and the Zip file will contain the file 320.tif. (where 320 is the Report Run ID)

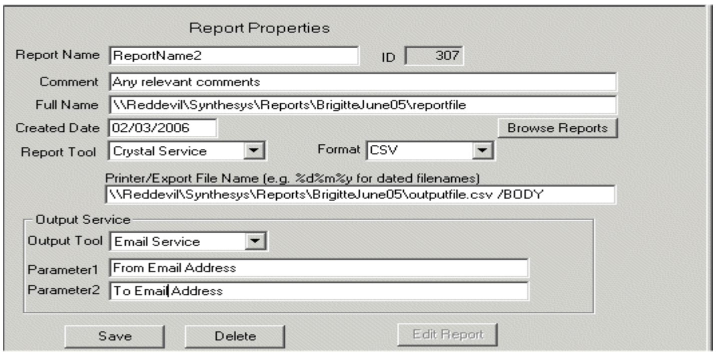
/BODY

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.

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

If the /ZIP parameter is used in conjunction the /BODY parameter, the /BODY parameter is ignored as a Zip file cannot be added to an email body. The /BODY parameter is ignored for formats other than Text and HTML.



<NODUP>

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

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

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

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

<Sequence_ID> <NODUP:60>

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

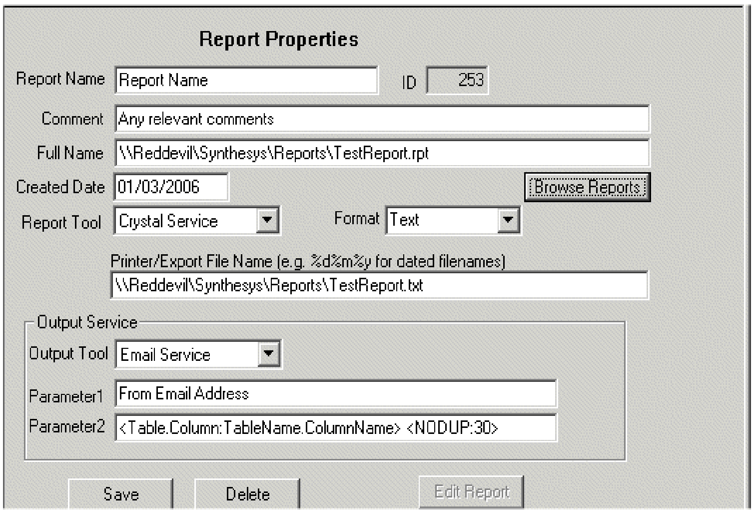
<NODUP> can be added to the following fields:

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

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

For example:

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



Notes:

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

<Attach:filename>

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

Printer/Export filename when setting up a report:

<Attach:d:\Myfile.txt>

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

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

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

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

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

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

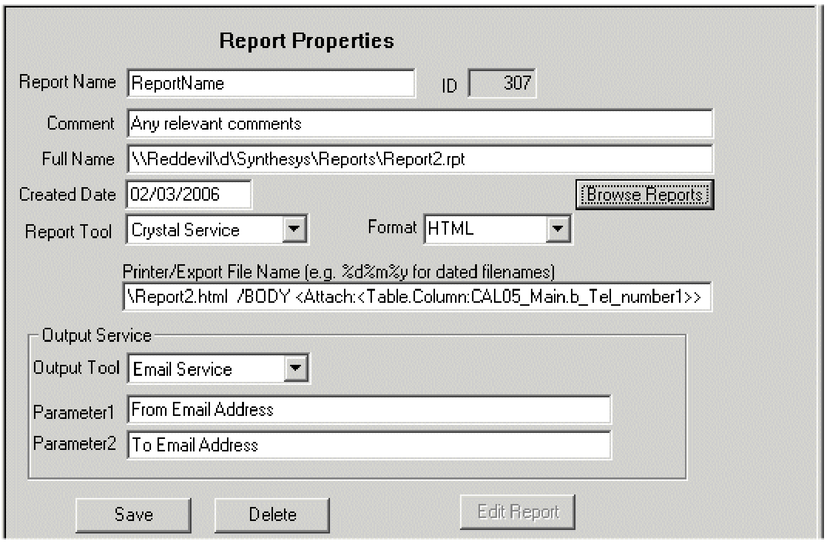
Here a filename contained in the database can be used as the attachment filename. (Note: for instant reports only)

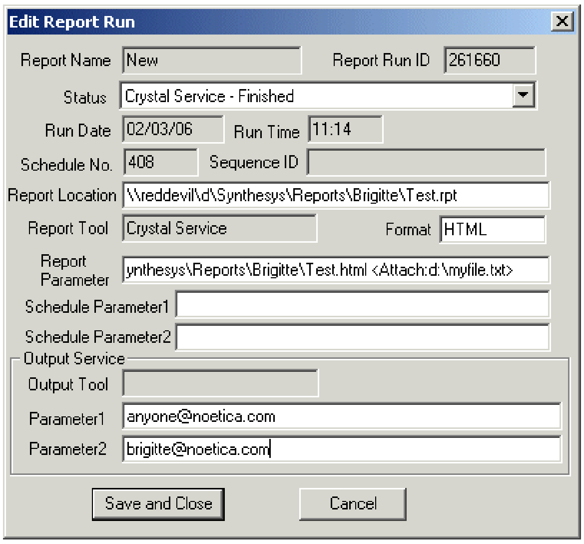
E.g.: D:\Synthesys\Reports\Report2.html <Attach:<Table.Column:CAL05_Main.b_Tel_number1>>

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

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

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





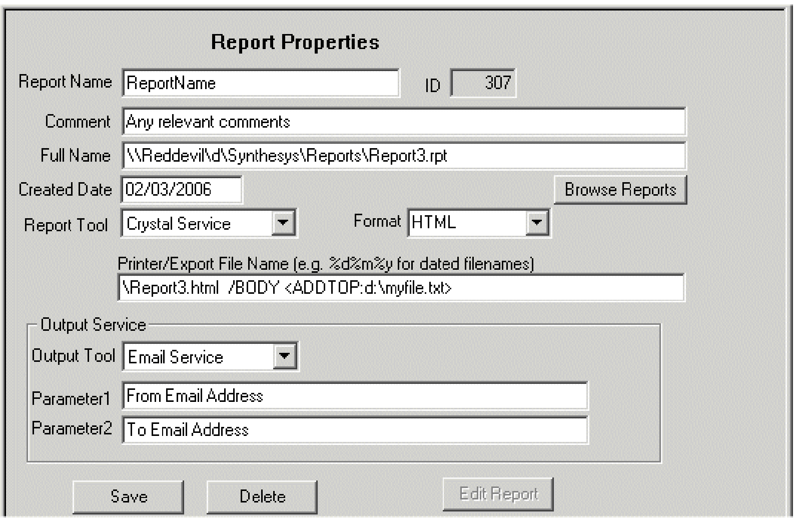
<ADDTOP:filename>, <ADDBOTTOM:filename>

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

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

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

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



Automatic output file naming

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

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

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

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

Emailing Using Aliases / Friendly Names

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

Emailing without an Alias:

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

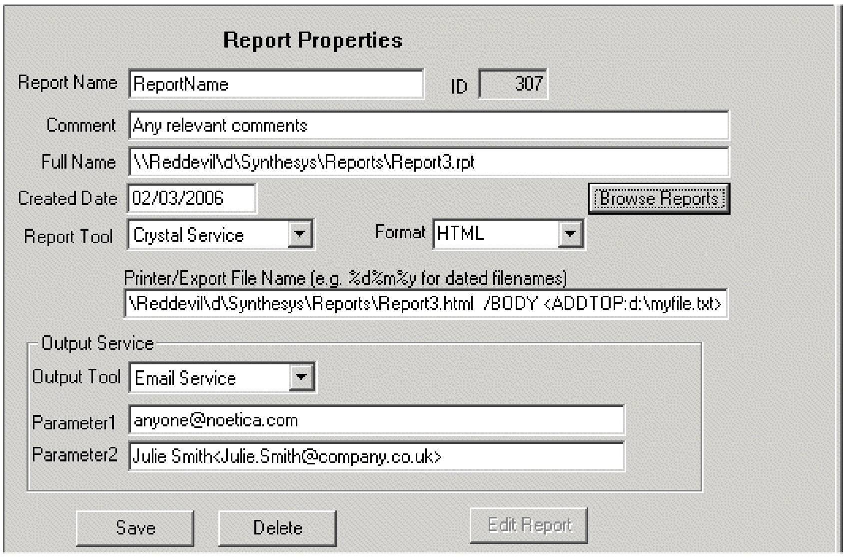
The email address is 'Julie.Smith@context.co.uk'.
This email would be sent to Julie.Smith@context.co.uk and would arrive addressed to Julie.Smith@context.co.uk

Emailing with an Alias:

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

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

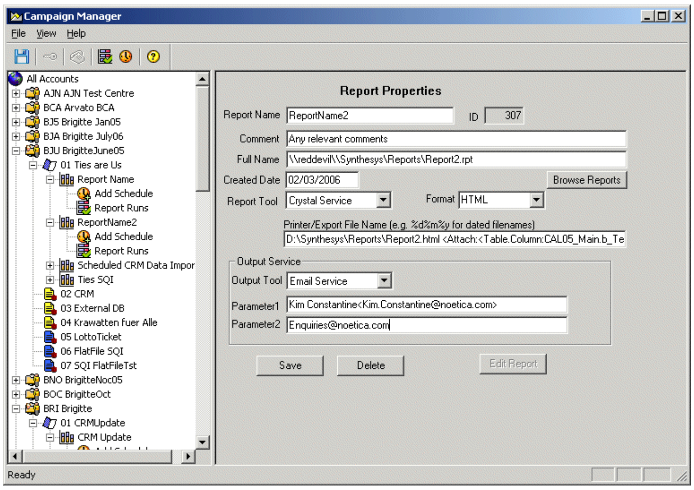
Note:
- **When Aliases are used, the email address must be enclosed in Angle brackets (<>).**
- **The friendly name can include commas, spaces and quotation marks, but not angle brackets.**
- **The above rules apply to both Sender and Recipient addresses.**



Requirement for Microsoft Exchange 2005

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

Kim Constantine<Kim.Constantine@noetica.com>

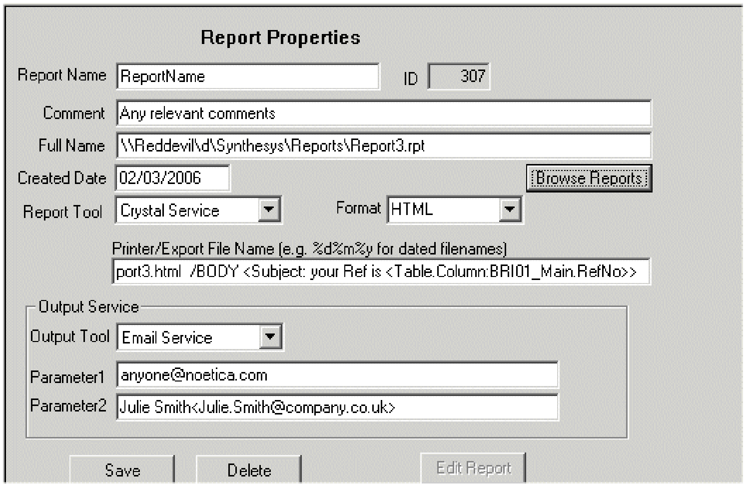


Email Subject

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

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

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



Crystal Reports in HTML format

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

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

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

Report Formats Summary

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

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

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

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

REPORT TOOLS AND SERVICES

Report tool information is maintained by the Campaign Manager. 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. Impromptu. 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

NOTES

NOTES