SYNTHESYS.NET CRM and OUTBOUND

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Teams User Management Applications		
		Welcome brigitte logout
Launch Applications		
]
Setup	Manage	Monitor
CRM	:::: Blending	E Live Monitor
Outbound		Synthesys Switch Monitor
Outbound Wizard		
Reports		



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Synthesys.Net CRM and Outbound

Software Release Version 5.1

Document Version: 1.5

Last updated September 2016

Notes prepared by Brigitte Reimer

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CUSTOMER RELATIONSHIP MANAGEMENT

CRM Maintenance Table

💑 Customer Designer			
🖻 🖬			
Customer Details		%	Â
Sufraine General Sufraine General Sufraine WorkTelephone Software Software Software Software Software Software Software Software Software Software		Default	A
S PostCode			T
		String size 40	
		🔽 Editable 🗖 Cannot	be empty 🔽 Index.
Prefixes	Save As	Save	Cancel

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.

	PhDesign	_ = ×
Califlow Editor		Style 🔹 🔞
Open & Publish Calificus Cut &	Plow Keight Selection New Decision Stored St	Assign DDI Popup script Maintenance - CRM Assign DDI Bangort CRM Besign More Tools - CRM
Set Pi	este salect an existing califow or click on the "New Califow" button to create a Al Synthesys Califors Al Synthesys Califors Al A Test Centre Aredo BCA Brady03	Tew 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

Select a Callflow				
Please select an existing califlow or click on the "New Califlow" button to create a new one:				
All Synthesys Califlows				
Allianz				
Brigitte Example				
Brigitte Training				
City Breaks				
Express Loan				
Sales Survey				
carotel outbound				
OK Cancel Test callflow New Callflow				



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 <u>New Callflow</u> to display the *New Callflow* window.

New Califlow
Account:
Prefix: <u>N</u> ame:
Directory:
Auto Archive (days) 30
Auto <u>P</u> urge (days) 90
OK Cancel

- 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 <u>must</u> 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.

New Account X				
Account N	ame: Brigitte Training Prefix: BTR			
Address: 55	Noetica 7-11 St Johns Hill Clapham Junction London			
Postcode:	SW11 1TN			
Main Cont	act: Danny Singer Telephone: 020 73268500			
Other Contact: Telephone:				
Fax: 020 8019515 e-Mail: enquiries@noetica.com				
World Wide Web: www.noetica.com				
Account Manager: Brigitte Reimer				
	OK Cancel			

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'.

New Califlow 🛛 🔀
Account: Brigitte Training New Account
Prefix: <u>N</u> ame: BTR 01 City Breaks
Directory: Scripts\BTR\01
Auto <u>A</u> rchive (days) 30 Auto <u>P</u> urge (days) 90
OK Cancel

- 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.
\sim .			
Callflow Edito	x	BR July09 (BRJ) - Product Order Line (01) Version 12.0 - PhDesign	Style *
Test CallFle	ow 📑 🔏 🐚 🗖 Screen View	🗸 🃚 💦 📩 🏞 🗟 Subflow	Assign DDI A Assign CRM
Open 🔮 Publish	Paste Cut	Help Selection New Decision Back to Subflow	Maintenance * CRM Design More Tools *
Finish	Callflow Editor	Tools	CRM

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



Help Pages. Not used in this version as Help pages for webflows are assigned in the Synthesys Interaction Studio.



The CRM Toolbar



Option Description

23	CRM. Add Customer Relationship Management to be used in a webflow.
2	Design Table . Opens the CRM Design Table to add any data fields, as required.
3	Import CRM. Opens the CRM Import wizard guiding users through the process of importing customer data.
23	Export CRM. Opens the CRM Export wizard to enable users to export customer data as a csv file.
ß	MORE TOOLS. To access CRM maintenance and the Synthesys Global Gallery via a drop down menu:
2	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 control selected.	
	Control Name
	enter control name
	<u> </u>

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 *for 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.

Customer Designer			
Customer Details Customer ID New		Prefix BRTST	
		Customer is not represented	d by any external table.
		Data Sou	Jice:
Prefixes	Save As	Save	Cancel

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.

Customer Designer						23
	New Property type Text Text Yes/No Group Property name Text	C Name C Telep C Contr	e (vhone (ol (40 ÷	Enumeration Date&Time E-mail OK Cancel		
	Save As			Save	Cancel	



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.

💑 Customer Designer			>	
🖻 🔒				
Customer Details Customer ID Costomer ID Costomer ID Costomer ID Costomer ID Costomer ID Costomer Idephone Software Street Software Software Software Software Software Software Software New	CRM Designer is about Are you sure you wa	Prefix SALSUR Customer is not represer Lt save changes. It to modify customer structure Cancel	nted by any external table.	
				To save an existing CRM under a new prefix use the <i>Save</i> <i>As</i> option.
	Save As	Save	Cancel	

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.

Properties X Settings Search Insert Modify Results Use prefix BRTST Image: Comparison of the search button Image: Image: Comparison of the search button Image: Comparison of the search button Image: Image: Comparison of the search button Image: Comparison of the search button Image: Image: Comparison of the search button Image: Comparison of the search button Image: Image: Comparison of the search button Image: Comparison of the search button Image: Image: Comparison of the search button Image: Comparison of the search button Image: Image: Comparison of the search button Image: Comparison of the search button Image: Image: Comparison of the search button Image: Comparison of the search button Image: Image: Comparison of the search button Image: Comparison of the search button Image: Image: Comparison of the search button Image: Comparison of the search button Image: Image: Comparison of the search button Image: Comparison of the search button Image: Image: Comparison of the search button Image: Comparison of the search button Image: Image: Comparison of the search button Image: Comparison of the search button Image: Image: Comparison of the search button Image: Comparison of the search	Properties Settings Search Insert Modify Results Image: Customer Dials Image: Customer Dials	Search: Fie for custome Insert: Field enter new cu details. Modify: Fiel for updating records Result: Fiel in the ambig
OK Cancel	OK Cancel	

lds enabled r search.

ds enabled to ustomer

lds enabled customer

ds displayed juity list.

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

Customer ID [not null]	
Title	
FirstName	
Surname	
Telephone	
Apartment	
Street	
Borough	
Town	
Postcode	
Email	

Click the Flow View ¹ 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.

Title	
FirstName	
Surname	
Telephone	Properties
Apartment	Delete
Street	View Compulsory Properties
Borough	View Database Column Names
Town	Assign Searchable Properties
Postcode	Assign Help for this control
Email	Calculations
J	Rename Control

Picking up an existing CRM Table

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

- Pick up a *CRM* icon ⁴⁴ 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.

Customer Designer	Save CRM trmplate Enter a new prefix. (This will be saved in the list of available prefixes) Prefix SALES OK	
	Save As Save	Cancel

- 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 ⁴⁴ 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.



• 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.

Colum	in headers	or da	ita:		Database fields:				
Mrs Fredo Fry 121 3 12 W Batte Nill	dy 3333 /est Way rrsea			•	Title FirstName Surname Telephone Line1 Line2 Line3 Line4	▲ ↑. 		Fil	e contains Istomer ID
Previe	ew of impo	rt file o	data:		11				
Mrs Mr	Freddy John	F S	121 111	3333 33333	12 West Way East Lane	Battersea Tower Ha	N	N N	London

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.

Databse update options	×
You must choose update database rows or insert row between import process	
Do you wish to run the import now?	
Import now	
C Schedule later in Campaign Manager	
	_
< <u>B</u> ack <u>N</u> ext > Cancel	

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.



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.

🖄 Campaign Manager		
File View Help		
💾 🗢 🚳 🗮 😉 🕐		
Al Accounts ASD Andrew Charles ASD Andrew Charles BRI Brighte Examples Charles BRI Brighte Report Charles Charle	Report Properties Report Name ID Comment ID Full Name \GOVL32\SYNTHESYS\Reports\CRM Schedules\BRLOAN/BRLOAN_Import Created Date 10/01/2008 Report Tool CRM IMPORT Servity Printer/Export File Name (e.g. 2dXm2y for dated filenames) \GOVL32\SYNTHESYS\Reports\CRM Schedules\BRLOAN/BRLOAN_Import Output Tool (mone> Parameter1 Parameter2 Save Delete Edit Report	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 ³ 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.

(3 13311)	

• 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.

es là				
XAR	XD	File contains column headers		
KALE	<u> (()</u>	Text string identifier:	" •	
L.	1 All	Field delimiter:		
78				
LAN				

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 <u>all</u> records of the 'VoucherID.csv' that you were trying to import.

VoucherID.csv.insert.txt

The file VoucherID.csv.insert.txt contains <u>all new</u> 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 <u>reason why</u> the <u>failed</u> <u>records</u> 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. C:\Documents See 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. C:\Documents See and Settings\Brigitte\Desktop\Import\VoucherID.csv.log.BulkCopy.txt for invalid lines Field P018 value (SW12 2 ER) is too long. C:\Documents See 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 <u>failed records</u> 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.

		Brigitte09 - Produ	ct Order - Dr I	Watson - Synthesys					_ 0	x
Take Calls Custom	Help							S	tyle 👻 🤕	0
Open Log Out Abort	et Call Next Rotas Heip rracker Action	Search New Customer Details Customer	History Modify Notes	Dial Get Net Customer Record	t Cal Diary	G Hang up G Hold G Unhold Telepho	Cransfer Park Dupark	 Break Reschedu Special Re 	le ischedule	
Good Morning. Co Op Note: Enter surname	uld I take your name	e, please? er is not found, click	cthe New	icon on the C	ustome	r toolbar a	nd enter de	itails.		
Customer										
Customer ID [not null]	BPROD_1									
Name										
inte	Dr									
Surname	Watson									
Telephone	112233445566									
Address										
Line1	Noetica									
Line2	7-11 St Johns Hill									
Line3	Clapham Junction									
Line4	London									
Line5	,									
Line6										
PostCode	SW11 1TN									
AddressStatus	1									
	P									
										-
Manual Cal						Ca	ls: 1 Time	: 01:25	To do	107

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



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 sicon, 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.

Name					
Title	Prof	History Notes	ELECT:ELECT_		
Surname	Harries	Date	Time	Operator Note	
Address				History Notes [ELECT:ELECT_1]	×
Line1	10 Richmond H			Important Note associated with the selected customer	
Line2	Luton				
Line3	Beds				
PostCode	LU2 7JG				
Telephone					
Number1					
CheckBox					
ChoicesMade	Gold				
				Save Note Cancel Note Cancel Note	
		,		Create Note	

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

Name]
Title	Prof	History Notes [EL	ECT:ELECT_1]	
Surname	Harries	Date	Time	Operator	Note
Address Line1	10 Richmond H	06/08/2009	18:18:46	Brigitte	Important Note associated with the selected customer
Line2	Luton				
Line3	Beds				
PostCode	LU2 7JG				
Telephone					
Number1					
CheckBox					
ChoicesMade	Gold				
					Create 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** kicon 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**.

₽ 2 ₽		BR July09 - Product Order Line	- Synthesys		_ = X	
Take Calls Custom	Help Find Call Next Rotas Calls Calls	rch Customer His Customer Detais Customer Customer	tory s Dial Get Next CA Customer Record Dia	Hang up & Tran Gi Hold @ Part ry & Unhold @ Unp Telephony	Style - @	
od Afternoon Ma	ay I take your surname p	lease?			٩ ۵	
Customer ID [not nu	ABORT_4				-	
Title FirstName	Mr					
Surname	Bloggs					
Address	1234567890	History for the cus	tomer BRCITY_2 [BRCI	[¥T		_ 0
Line1	Apt 11	Event	Event Date and Time	Event Text	Opera Accou	Camp
Line2	12 West Way	📕 Call Queued 🗧	31/03/2009 13:29:18	Call 7409 queued	Brigitte	
Line3	London	🗧 📱 Call Deleted 🔅	31/03/2009 15:04:03	Call 7409 Deleted	Brigitte	
Line4		- PNote 2	26/08/2009 12:49:33	Note	1005	
Line5		Document 2	26/08/2009 12:50:38	Blank.ini	1005	
L ine6						
PostCode		-				
	120011					
		Add Note	Attach	<u>Filter</u>	s<< <u>C</u> lose	
		Event		⊥ime		
		<not active=""></not>		_	Data Tima	
		<u>O</u> perator		From J.	3173 72009 111:0.	2
		<not active=""></not>		- To 2	26 / 8 / 2009 12 : 53	2
		, Event Te <u>x</u> t				
		<not active=""></not>		<u>R</u> eset Va	lues Filter Events	

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 hand using the Search select a customer record.
- Click the **History** icon to open the **History for the Customer...**. dialog.

🧟 History for the c	ustomer BRCITY_2 [BRCI	TY]			_	
Event	Event Date and Time	Event Text	Opera	Accou	Camp	OE
📱 Call Queued	31/03/2009 13:29:18	Call 7409 queued	Brigitte			
📱 Call Deleted	31/03/2009 15:04:03	Call 7409 Deleted	Brigitte			
🦻 Note	26/08/2009 12:49:33	Note	1005			
📑 Document	26/08/2009 12:50:38	Blank.ini	1005			
						F
<u></u>						
Add <u>N</u> ote	<u>A</u> ttach	Eilters	5<<	<u>C</u> lose		
<u>E</u> vent		⊥ime				
<not active=""></not>		•	Date	Time		
Operator		From 3	31/3/200	09 11:02	2	
		То 2	26/8/200	9 12:52	2	
<pre>Not Active></pre>						
Event Te <u>x</u> t						
<not active=""></not>		▼ <u>R</u> eset Va	lues F <u>i</u> lte	er Events		

- 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* ^{2/2} 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.

	anUp		
Prefix			
(²)	(²) 24 00	(^a) are	(¹) as
	B100		BP 709
	B2K700		
AITEN3	BADR	E 863332	BRETST
T ANT	BCA4	BHELP1	BRFILE
APPLE	🗍 BCA4T	🗍 BJAFSQ	BRFLAT
🗂 AUTO	🗍 BCRM	🗒 BJASQI	🗍 BRFSQI
🗂 AUTO2	🗍 BCRMIM	🗂 вов	🖉 BRIET
•			Т
A64		Defens	
Arter		Berore	
August 09	, 2006 06:06 👻	 August 	10, 2006 06:06 🛛 👻
Event Tynes			
P a a a a a a a a a a a a a a a a a a a	<u> </u>	a second and a l	<u>A</u>
Bulk OB	Cus Cus	stomer Details Altered	Note
Bulk OB	Cus Cus Cus	stomer Details Altered stomer Structure Altered stomer Structure Created	Note
 Bulk OB CallDeleted CallQueued CallReschedule 	Cus Cus Cus ed Îl Doc	stomer Details Altered stomer Structure Altered stomer Structure Created sument	Note O/B Call O/B Call O/B Call Failed O/B Call Failed O/B Call Failed
Bulk OB CallDeleted CallQueued CallReschedule CallScheduled	Cus Cus Cus sd Doo Tu/B	stomer Details Altered stomer Structure Altered stomer Structure Created sument Call	Note O/B Call O/B Call Failed O/B Call Failed OBManager Chanc OpAssigned
Bulk OB CallDeleted CallQueued CallReschedule CallScheduled CallScheduled CallScheduled CallSlept	Cus Cus Cus Sus Cus I Joo L/B J J/B	stomer Details Altered stomer Structure Altered stomer Structure Created cument Call Call Failed	Note O/B Call O/B Call Failed O/B Call Failed O/B Manager Chanc OpAssigned Predictive Dialler
Bulk OB CallDeleted CallQueued CallReschedule CallScheduled CallScheduled CallSchedulet CallSlept CallUnslept	دیک [] دیک [] دیک [] امر [] ار آل سیس []	stomer Details Altered stomer Structure Altered stomer Structure Created cument Call Call Failed yort Customer	Note O/B Call O/B Call Failed O/B Call Failed OBManager Chang OpAssigned Predictive Dialler Runner Dial
Bulk OB CallDeleted CallQueued CallRescheduled CallScheduled CallScheduled CallSlept CallUnslept CallUnslept Customer Dele	Cus Cus ed Doc 11/8 71/8 11/9 11/9 11/9 11/9 11/9 11/9 11/9 1	stomer Details Altered stomer Structure Altered stomer Structure Created cument Call Call Failed port Customer « Customer Created	Note O/B Call O/B Call Failed O/B Call Failed ODAssigned Predictive Dialler Runner Dial SQI Queue Result
Bulk OB CallDeleted CallQueued CallScheduled CallScheduled	Cus Cus d d J L/B J L/B ted Nev	stomer Details Altered stomer Structure Altered stomer Structure Created cument Call Failed over Customer v Customer Created	Note O/B Call O/B Call O/B Call Failed O/B Call Failed OBManager Chang OpAssigned Predictive Dialler Runner Dial SQI Queue Result
Bulk OB CallDeleted CallQueued CallReschedule CallScheduled CallSchedulet CallSchedulet CallUnslept CallUnslept CallUnslept	Cus Cus d Doc JB S JB V IB Trip ted Nev	stomer Details Altered stomer Structure Altered stomer Structure Created cument Call Gall Failed over Customer w Customer Created	Note O(8 Call O(8 Call O(8 Call O(8 Call Failed O(8 Call Failed O(9 Call Fail

PrefixIn the CRM History Cleanup dialog, tick the CRM prefixes, for the
history events to be deleted.After / BeforeSelect the date range (After – Before) for the history events to be
deleted.Event TypesTick 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* \swarrow 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.

☐ APPLE ☐ AUTO ☐ AUTO2 ☐ B100 ☐ B2R708 ☐ B3278 ☐ BADR ☐ BCA4	BF5QI BG3332 BHELP1 BJAF5Q BJA5QI BOB BP BR708		BRZ25 BTW C1915 C20599 C20598 C2059C C2059W C2059W C20307	
BCA4T BCRM BCRMIM BEE BEE BFILE2	BRDTQ BRETST BRFILE BRFLAT BRFSQI	BRTIES BRZZ1 BRZZ2 BRZZ3 BRZZ3 BRZZ4	() ⊂3370 () ⊂976 () ⊂A111 () ⊂A1111 () ⊂A4464	

- 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

Image: Second	Customer Details					
Lemai Loncel	FirstName Sumame Street Str	Property type Text Number Yes/No Property name	C Name C Telephone C Control	C C C	Enumeration Date&Time Group	
		Email			Cancel	

Adding an Outbound List & selecting a Team

Outbound Setup W	izard - Step YN Outbound (4 THESYS ampaign X	× ∕izard
	Name:	New OBCampaign Predictive	
	Team:	Global> Global	New Modify
	[< Back Next> Cancel	Help



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.

Outbound Setup Wizard - Ste	2p 1	×
	Welcome to Outbound Setup Wizard	
	<back next=""> Cancel Help</back>	<u> </u>

- 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.

Outbound Setup Wizard - Step 2	×
SYNTHESYS	ıp Wizard
Select an Account All Accounts Brighte Training BRTest DemonstrationandTrainingScripts potest Microsoft Microsoft MoNDIAL P Noetica Telebusiness Califlows	New
< <u>₿</u> ack <u>N</u> ext>	Cancel Help

- 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.

New Account X Account Name: Brigitte Training Prefix: BTR	The <i>Prefix</i> must be unique and contain
Address: Noetica 7-11 St Johns Hill 55 Clapham Junction London	three characters. It is used to identify all data held against the account in the database.
Postcode: SW11 1TN	
Main Contact: Danny Singer Telephone: 020 73268500	
Other Contact: Telephone:	
Fax: 020 8019515 e-Mail: enquiries@noetica.com	The Account Name, Prefix and Account
World Wide Web: www.noetica.com	Manager fields are compulsory and must
Account Manager: Brigitte Reimer 💌 Invoice ID:	be completed.
OK Cancel	

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.

Account: CRM Prefix: Brigitte Training BRCITY Prefix: Name: BTR 05 CityBreaks Directory: Scripts\BTR\05	n this CRM in the ase.
Auto Archive (days) 30 Auto Purge (days) 90 OK Cancel	

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

Synthesys.Net: CRM & Outbound



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.

🛃 Customer Designer			_	
	C Name C Enume Telephone C Date& C Control C Group	ration Time OK		Use
	Save As	Save	Cancel	enat

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.

Outbound Setup W	izard - Step	4	×
S S	YN Outbound C Name: Team:	THESYS ampaign ✓ Predictive Global> Global> Hybrid Mew Modify	
		Microsoft Microsoft2 ModialJoe OK Cancel < Back Next> Cancel Help]



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 %.

Outbound List Advanced Options
Maximum lateness: 0 Days 0 Hours 30 Mins
Maximum Nuisance calls (%): 3 %
Additional Options OperatorBias
false
Overdial factor:
Web flows:
Cancel

• **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 <i>True</i> (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 <i>ReverseID</i> 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. <i>Deactivate and</i> <i>re-activate</i> 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 <i>Get Next</i> <i>Record</i> icon at run time to request the next preview call.
MaximumNextCallLateness	Specify in minutes the maximum lateness by which <i>calls requested via the Call Diary</i> (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	<i>True/ False.</i> 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

∫ 🔊 Synthesys - Outbound Manager						_ 🗆 🗙
Eile Edit View Help						
All Accounts	ID	Customer ID	Outbound List	Retry Time	Times Called	Agent ID
E DemonstrationandTrainingScripts	87	ELECT_15	CBout	n/a	0	none
E 👘 Telebusiness Califlows	8 8	ELECT_2	CBout	n/a	0	none
- ClectroBuy	89	ELECT_3	CBout	n/a	0	none
ElectroCB	8 10	ELECT_4	CBout	n/a	0	none
	8 11	ELECT_5	CBout	n/a	0	none
ElectroFault	2 14	ELECT_8	CBout	2009-08-13 17:16	0	none
All Groups	2 15	ELECT_9	CBout	2009-08-13 17:16	0	none
	₂ z Z ₁₂	ELECT_6	CBout	2009-08-12 17:57	0	none
	₂ z Z ₁₃	ELECT_7	CBout	2009-08-12 17:57	0	none
	1	ELECT_1	CBout	n/a	1	none
	28 2	ELECT_10	CBout	n/a	1	none
	223 3	ELECT_11	CBout	n/a	1	none
	884	ELECT_12	CBout	n/a	0	none
	2235	ELECT_13	CBout	n/a	0	none
	7 6	ELECT_14	CBout	n/a	0	none
	16	ELECT_1	CBout	2001-06-21 12:05	1	1000
	8 17	ELECT_10	CBout	n/a	0	none
	•					Þ
, Middle of the Queue. Hit page down for more record:	;	17 Queu	e Items.			

Creating Call Lists

View Call Statistics

BList Statistics: S	iales Survey	×
Queue Items		
Done:	1	
🔒 Queued:	6	
💯 Scheduled:	0	
Attention:	1	
🖀 Never Call:	0	
🥪 Running:	0	
₂zZ Sleeping:	0	
? Wrong No:	0	
🤠 Unobtainable:	0	
👺 PD Running:	0	
Recycling Complete:	7	
Total:	15	
Structure		
Accounts:	20	
Campaigns:	29	
CRM	28	
Outbound Lists:	37	
Active:	31	



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.

Eile Edit Year	🔊 Synthesys - Outbound Manager 📃 🔍						
All Accounts Image: Call of the second	<u>File Edit View H</u> elp	Eile Edit <u>Vi</u> ew <u>H</u> elp					
All Accounts ID Customer ID Outbound List Retry Time Times Called Agent ID IP DemonstrationandTrainingScripts 7 ELECT_15 CBout n/a 0 none IP ElectroBuy ID ELECT_2 CBout n/a 0 none IP ElectroBuy ID ELECT_3 CBout n/a 0 none ID ElectroBuy ID ELECT_3 CBout n/a 0 none ID ElectroBuy ID ELECT_3 CBout n/a 0 none ID ElectroFault 10 ELECT_4 CBout n/a 0 none ID ElectroBuy ID ELECT_4 CBout n/a 0 none ID ElectroBuy ID ELECT_6 CBout n/a 0 none ID ELECT_1 CBout n/a 1 none 22 12 ELECT_1 CBout n/a 1 none ID ID ELECT_1 CBout							
P DemonstrationandTrainingScripts P Telebusiness Califlows P ElectroBuy P ElectroFault CBout n/a 0 P ElectroFault All Groups 10 ElectroFault 11 ElectroFault 12 CBout n/a 0 none 11 ELECT_5 CBout n/a 0 none 11 ELECT_6 CBout n/a 0 none 11 ELECT_7 CBout 2009-08-13 17:16 0 none 22 ELECT_1 CBout 2009-08-12 17:57 0 none 22 ELECT_1 CBout n/a 1 11 ELECT_10 CBout n/a 11 ELECT_11 CBout n/a 1 22 ELECT_10 CBout n/a 0 none 35 ELECT_11 CBout n	S All Accounts	ID	Customer ID	Outbound List	Retry Time	Times Called	Agent ID
Image: Solution of the formula of t	🗄 🔁 🔁 DemonstrationandTrainingScripts	87	ELECT_15	CBout	n/a	0	none
9 ELECT_3 CBout n/a 0 none 10 ELECT_4 CBout n/a 0 none 11 ELECT_5 CBout n/a 0 none 11 ELECT_6 CBout n/a 0 none 11 ELECT_7 CBout n/a 0 none 12 ELECT_8 CBout 2009-08-13 17:16 0 none 13 ELECT_9 CBout 2009-08-13 17:16 0 none 14 ELECT_8 CBout 2009-08-13 17:16 0 none 15 ELECT_10 CBout 2009-08-13 17:16 0 none 15 ELECT_10 CBout 2009-08-12 17:57 0 none 12 ELECT_11 CBout n/a 1 none 12 ELECT_11 CBout n/a 1 none 16 ELECT_14 CBout n/a 0 none 16 ELECT_10 CBout n/a 0 none 17 ELECT_10	E Flebusiness Callflows	8	ELECT_2	CBout	n/a	0	none
Image: CBout CCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCC	ElectroBuy	89	ELECT_3	CBout	n/a	0	none
CBout 11 ELECT_5 CBout n/a 0 none All Groups 14 ELECT_8 CBout 2009-08-13 17:16 0 none 3 ²² ELECT_9 CBout 2009-08-13 17:16 0 none 3 ²² ELECT_9 CBout 2009-08-12 17:57 0 none 3 ²² ELECT_1 CBout 2009-08-12 17:57 0 none 3 ²² ELECT_1 CBout n/a 1 none 3 ²³ ELECT_11 CBout n/a 1 none 3 ²⁴ ELECT_12 CBout n/a 1 none 3 ²⁵ ELECT_11 CBout n/a 1 none 3 ²⁴ ELECT_12 CBout n/a 0 none 3 ²⁵ ELECT_11 CBout n/a 0 none 3 ²⁵ ELECT_12 CBout n/a 0 none 3 ²⁶ ELECT_10 CBout n/a 0 none 3 ²⁷ ELECT_10 CBout n/a 0		8 10	ELECT_4	CBout	n/a	0	none
Image: All Groups 14 ELECT_8 CBout 2009-08-13 17:16 0 none Is ELECT_9 CBout 2009-08-13 17:16 0 none Is ELECT_9 CBout 2009-08-13 17:16 0 none Is ELECT_9 CBout 2009-08-13 17:16 0 none Is ELECT_7 CBout 2009-08-13 17:57 0 none Is ELECT_1 CBout 2009-08-12 17:57 0 none Image: Interview 1 ELECT_11 CBout n/a 1 none Image: Interview 1 ELECT_11 CBout n/a 1 none Image: Interview 1 CBout n/a 0 none Image: Interview </td <td>CBout</td> <td>8 11</td> <td>ELECT_5</td> <td>CBout</td> <td>n/a</td> <td>0</td> <td>none</td>	CBout	8 11	ELECT_5	CBout	n/a	0	none
All Groups	ElectroFault	2 14	ELECT_8	CBout	2009-08-13 17:16	0	none
#2 ² 12 ELECT_6 CBout 2009-08-12 17:57 0 none 32 ² 13 ELECT_7 CBout 2009-08-12 17:57 0 none 1 ELECT_1 CBout n/a 1 none 2 ELECT_10 CBout n/a 1 none 2 ELECT_11 CBout n/a 1 none 2 ELECT_12 CBout n/a 1 none 2 ELECT_13 CBout n/a 1 none 2 ELECT_11 CBout n/a 0 none 2 ELECT_12 CBout n/a 0 none 205 ELECT_13 CBout n/a 0 none 26 ELECT_14 CBout n/a 0 none 216 ELECT_10 CBout n/a 0 none 217 ELECT_10 CBout n/a 0 none	Mil Groups	9 15	ELECT_9	CBout	2009-08-13 17:16	0	none
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1 ELECT_1 CBout n/a 1 none 2 ELECT_10 CBout n/a 1 none 3 ELECT_11 CBout n/a 1 none 3 ELECT_12 CBout n/a 0 none 3 ELECT_13 CBout n/a 0 none 3 ELECT_14 CBout n/a 0 none 3 ELECT_13 CBout n/a 0 none 3 ELECT_14 CBout n/a 0 none 4 ELECT_10 CBout n/a 0 none 6 ELECT_10 CBout n/a 0 none 16 ELECT_10 CBout n/a 0 none 17 ELECT_10 CBout n/a 0 none		₂z Z 13	ELECT_7	CBout	2009-08-12 17:57	0	none
¹² ² ¹		<u>^</u> 1	ELECT_1	CBout	n/a	1	none
Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for processed Image: Second state of the second data for procesed Image: Se		283 2	ELECT_10	CBout	n/a	1	none
Image: Second control of the contro		883 3	ELECT_11	CBout	n/a	1	none
Image: Second state of the construction of the construc		233 4	ELECT_12	CBout	n/a	0	none
The formula of the construction Th		233 5	ELECT_13	CBout	n/a	0	none
16 ELECT_1 CBout 2001-06-21 12:05 1 1000 17 ELECT_10 CBout n/a 0 none		76	ELECT_14	CBout	n/a	0	none
IT ELECT_10 CBout n/a 0 none		16	ELECT_1	CBout	2001-06-21 12:05	1	1000
		17	ELECT_10	CBout	n/a	0	none
Middle of the Owner of the event second and the Community of the event		•					Þ
Imigale of the Queue, Hit bage down for more records II/ Queue Items,							

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.

Properties	Add Outbound List Add Predictive Outbound List Add SMS Outbound List Add EMAIL Outbound List	
	Properties	

• 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.

Outbound List	Properties
Outbound ID:	
Name:	Sales Survey
Account ID:	139
Account:	BR AugSept
Campaign ID:	1659
Campaign:	Jan PD test
Lo	w Normal High
Priority:	
Campaign Exp	pires 🔽 Start Date: 08/01/2016 ▼
	End Date: 31/03/2016 💌
ОК	Cancel Advanced Active Times

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.

Add Outbound List
Add Predictive Outbound List
Add SMS Outbound List
Add EMAIL Outbound List
Add List Cleaning Outbound List
Properties
Statistics

• 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.

Outbound List	Properties		
Outbound ID:			
Name:	Sales Survey		
Account ID:	139		
Account:	BR AugSept		
Campaign ID:	1659		
Campaign:	Jan PD test		
Lo	w Normal High		
Priority:	· · · · · · · · · · · · ·		
Campaign Exp	pires ♥ Start Date: 08/01/2016 ♥		
OK	Cancel Advanced Active Times		

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.
- Active Times

Set Office Hours

Clear

Click OK to confirm the active times for your Outbound list.

ÖK

Cancel

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 Green Cells Lavender Blue

Inactive Period

Recycling Time Periods

Active Period

Π

Display the inactive times Display the active times 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 %.

Outbound List Adva	anced Options X
Maximum lateness:	0 Days 0 Hours 30 Mins
Maximum Nuisance	calls (%): 3 %
Additional Options	OperatorBias
	false
Overdial factor:	[100
Web flows:	
	OK Cancel

• **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.



Available Options	Use True/ False. Turns on/ off Answer Machine Detection, providing the switch supports AMD.			
Answer machine detection				
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 <i>True</i> 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 reactivate 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 <i>Get Next Record</i> 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 <i>calls requested via the Call Diary</i> (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 <i>C.L.A</i> and/ or P to determine how the Reschedule dialog is presented to agents when aborting preview or predictive 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 representing 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 <u>Use Do Not</u> <u>Call List</u> 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.

Outbound List Advanced Options					
	Maximum lateness:	0 Days 0 Hours 1 Mins			
	Additional Options	RescheduleFlags			
	Overdial factor:	[100			
	Web flows:	_			
	Time Zone:				
		OK Cancel			

Setting up Reschedule Flags

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

- 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.

SMS Campaig	ns	
Outbound ID		
Name	SMS Outbound	
Account ID	3	
Account	Brigitte Training	
Campaign ID	8	
Campaign	City Breaks	
Sender's Nam	e Noetica	
Campaign Exp	pires 🔽	
Message (0)		Calculations
To <u>CustName</u>	5MS Outbound message	-
	ond Outboaria message	
Noetica		•
ОК	Cancel	Active Times

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*.

Email Properti	es	
Outbound ID		Email Calculations
Name	Email Outbound	To <u>CustName</u>
Account ID	3	This is a test outbound email
Account	Brigitte Training	
Campaign ID	8	
Campaign	City Breaks	
From Address	training@noetica.com	
Subject	Test Email OB	
Campaign Expi	res 🔽 Start Date 25/08/2009 💌 End Date 25/08/2009 💌	
ОК	Cancel Active Times	

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.

C A Repair) Survey urvey
_	Deactivate
	Activate
	Queue calls
	Process DoNotCallList for this campaign now
	Delete
	Convert Campaign
	Set Recycling Rules
	Auto Dial
	Statistics
	Manage Quotas
_	Properties

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.



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.

Telephone	X
The CR Telepho use fron	M for this Dutbound Campaign has more than one ine property. Please select which one you want to the list below.
	Mobile
	Home Telephone
	Mobile
	Work Telephone
	OK Cancel
	OK Cancel

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.



type

Setting Recycling Rules

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

To adjust the sleeping (recycling) periods for individual Outbound 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.

Recycling Settings	Set Recycling Periods
No answer sleep period Days Hours Minutes 0 - 4 - 0 -	To adjust the sleeping period, select the aborted typ outcome and adjust the settings to the desired
Answerphone sleep period Days Hours Minutes 0 - 4 - 0 -	number of days, hours and minutes. When the time is up the call will join the live queue, displaying a green traffic light.
Busy sleep period Days Hours Minutes 0 - 0 - 30 -	
NC sleep period Days Hours Minutes 3 - 0 - 0 -	Call before attention: allows you to specify how often a call will be placed back into the queue after
Calls before attention: 5 🛨	an unsuccessful attempt to contact a customer, before it is brought to the attention of the call centre supervisor.
OKCancel	



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.

ccount properties		ž
General		
Account Name: Brigitte		
Account ID: 8	Prefix: BRI	
Account Manager:		
Contents		
6 campaigns, 2 CRM enabled.		
4 queue items in 1 outbound ca	ampaign.	
		Cancel

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.

C MiContact Center Outbound - Outbound	d Ma	nager							
File Edit View Help									
□ ☞ 🖬 % 🖻 🖻 증 🤋 🛃	⊼ ↓								
ll Accounts	*	ID	Customer.	Outbound List	Retry Time	Times Cal	Agent ID	Agent Name	Telephone
🖶 🔂 aaaMattTest									
🖶 👘 AB LPD Test									
🖶 👘 AJN Test Centre									
🖶 🔂 Alistair Testing	E								
🖶 🔂 Allianz									
🖶 👘 Arvato BCA									
💼 🗊 BR AugSept		Outhound	ist Droport	ine	23	1			
💼 🗊 BR February2013			ist Proper	ues					
BR PD PerformanceTest		Outbound	n. 1655						
👜 😰 BR PD Regression Test1		News							
😐 😰 BR PD Testing		ixanie.	Sales S	urvey					
Brentford Dry Docks		Account ID	: 164						
🗄 🕞 Brightside		Account	Drinitto	Landor/2016					
🗄 🕞 Brigitte DecJanuary2015		Account.	Digke	Janepizoro					
🗄 🕞 Brigitte FebMarch2014		Campaign	D: 1831	Outbound List Adva	nced Options		X		
😑 😈 Brigitte JanApr2016		Campaign	BB 20						
⊟ BR 2016 test		Campaign.	Joir co	Maximum lateneer	0 Dave 15	Houre 4	Mins		
BR DBSQI				maximum lateriess.	10 0400 110	i ilidais (4			
BR SchedDB			Low						
Sales Survey		Priority:	1.1						
E SR QAWin 2				Additional Options	Use do not call list		-		
Brigitte Oct2011		Campaign	Expires 🗖				_		
Brigitte Telebusiness					True				
Brigitte Test2011				Overdial factor:			-		
Brighteran2012		ОК	1 0		`		- 1.00		
Camella test		<u> </u>		Web flows:			Ŧ		
Case0044									
H-B CEVA				Time Zone:	(UTC) Dublin, Edinb	ourgh, Lisbon, Lor	-		
Chase Response CSAT					1/1 . 1/1				
Christest				_					
DAF Inbound Applications					OK Ca	ancel			
E-B DAF Outbound	Ŧ	•							
End of Queue. Hit page up for more records			0 Que	ue Items.				1000 C	1



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

Outbound List Adv	anced Options 🗙	
Maximum lateness:	Days D Hours 30 Mins	
Additional Options	Use do not call list	To disable the UseDoNotCallList feature,
Overdial factor:	[100	adu the word FALSE , then click OK.
Web flows:	X	
Ľ	OK Cancel	

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.

🎧 Synthesys - Outbound Manager							- 0 2	×
File Edit View Help								
C 🛩 🖬 X h fi 🖨 🔗 👌	Z ↓							
All Accounts	•	ID	Customer ID	Outbound Campaign	Retry Time	Times Called	Agent ID	100
🗄 👘 AJN Test Centre		8 20424	BRFlat_7	Ties OB	n/a	0	none	
🗄 🔞 Arvato BCA		8 20424	BRFlat_3	Ties OB	n/a	0	none	
🗄 🔂 Brigitte July06		8 20424	BRFlat_2	Ties OB	n/a	0	none	
🖻 🔂 Brigitte March08		8 20424	BRFlat_4	Ties OB	n/a	0	none	
E- Ties OB		8 20424	BRFlat_10	Ties OB	n/a	0	none	
After 27 02 2008		8 20424	BRFlat_11	Ties OB	n/a	0	none	
Deactivate			Flat_12	Ties OB	2008-02-29 11:15	0	1035	
			Flat_13	Ties OB	2008-02-29 11:15	0	1035	
Brighten Oueue calls			Flat_14	Ties OB	2008-02-29 11:15	0	1035	
Brighten Process DoNotCallList for this	s camp	paign now	Flat_5	Ties OB	n/a	0	none	
F BrigitteC			Flat_6	Ties OB	n/a	0	none	
ERJan04			Flat_8	Ties OB	n/a	0	none	
E Bull Convert Campaign			Flat_9	Ties OB	n/a	0	none	
E Gamelia Set Recycling Rules								
🕀 😥 DAF Inb 🗸 Auto Dial								
E DAF Out Statistics								
🕀 😥 dazza Manage Quotas								
Demonst Properties								
Elliot								
ing may								
	-	•					2	*
Middle of the Oueue. Hit page down for more rec	ords		13 queue	e items.				1

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:



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.

Outbound Group Properties - Predictive Active	1
Outbound Group ID 375	
Outbound Group Advanced Options	
h Priorit Maximum Nuisance calls (%): ا <mark>ک</mark> %	To set the Maximum Nuisance call rate (%) click the <i>Advanced</i> tab.
OB C Cancel 7	Set the Active times for the group via the <i>Active Times</i> button.
OK Cancel Advanced Active Times	

Set your *Active times* for the outbound group. •

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.

Outbound Group Prope	erties - Preview Act	ive 🔀	
Outbound Group ID	1594		
Outbound Group Name	BR JuneTest		
Low	Normal	High	Tick <i>Campaign Expires</i> to specify a <i>Start and End Date</i> for the group.
Priority:			
OB Group Expires 🗖	Start Date: 08	3/06/2015 🚽	Set the Active times for the group
	End Date: 10)/06/2015 🚽	
OK Car	Advanced.	Active Times	

• Set the *Active times* for the outbound group.

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 <i>Get Next Record</i> 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.

Add Outbound List
Only Dial From Active Lists
Deactivate Activate
Delete
Convert Outbound Group Auto Dial Statistics
Properties

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).

Move To Outbound List Please, Select Destination Outbound List with Custor Image: All Accounts Image: All Accounts	mer Prefix: Selected Item: Account ID: Account: Campaign ID: Campaign: OBList ID: OBList: Customer Prefix: Cancel	BRLOAN BRLOAN Brigitte Training 15 Express Loan 63 Loan OB BRLOAN BRLOAN
--	--	--

- 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.

Outbo	und	Cam	paig	n W	eigh	iting				×
c	Dutbo	bund	Camp	aign	Wei	ghtin	g in t	he G	roup	
0	1	2	3	4	5	6	7	8	9	10
1	ı	1	__	1	1	1	1	ı	1	1
		C)K				Can	cel		

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





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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.



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 <i>Status Bar</i> . A tick next to this option indicates that the <i>Status Bar</i> is currently visible.

Time Period Pull Down Menu

Menu Option	Used To
Edit	Open the <i>Time Period</i> 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
D	Start a new Recycling Script
	Save and Release the currently displayed Recycling Script.
2	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.

	OP 🔒	3		Δ		•	Q	Q			9	0	?	1
--	------	---	--	---	--	---	---	---	--	--	---	---	---	---



Activate the selection tool.

- Change the Telephone Number to call.
- 2

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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
- **Q 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).



9

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



4

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 Unobtainable & Faxtone Wrong & Invalid Number Missed latest time period	 Never Call Unobtainable Wrong Number
Other Busy	 Until from agent and Sleep for 1min Attention Sleep for 30min
No Answer Answerphone Nuisance Call	Sleep for 24hours 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.

Select the value upon which the decision is based SYNTHESYS Call Recy	rcling
Times Called Total number of times called Total number of times called on the last number Total number of times called on a named number Times Called in a Time Period Total number of times called in a time period Total number of times called in a time period on the last numt Total number of times called in a time period on a named nun	Miscellaneous C Last call result Time period of the last call Last number dialled Time since queued Time since first called Is tied to an agent CRM Data Priority Cancel

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.

- Total number of times called	New Branch
Default	Delete Branch
□ 5+	Add Condition
f Greater Than or Equal to 5	Delete Condition

We then dropped the 'Strategy Complete' K 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.

Select the value upon which the decision is based	
SYNTHESYS Call Recy	cling
Times Called Times Called Total number of times called Total number of times called on the last number Total number of times called on a named number Times Called in a Time Period Total number of times called in a time period Total number of times called in a time period on the last numt Total number of times called in a time period on a named nun	Miscellaneous
	OK Cancel

- 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 the value upon which the decision is based	vcling	
Times Called Total number of times called Total number of times called on the last number Total number of times called on a named number Times Called in a Time Period Total number of times called in a time period Total number of times called in a time period on the last numt Total number of times called in a time period on a named nun	Miscellaneous Last call result Last rumber dialled Time period of the last call Last rumber dialled Time since queued Time since first called Is tied to an agent CRM Data Priority OK Cancel	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'** ⁽¹⁾ 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'.

Setup decision b	anching using the tree window below.	 New Desirely
	umber of times called on a named number	Delete Branch
	Default	
I	Work x3	Add Condition
	nan or cquar to 📩 📕 💼	

- 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' $\textcircled{1}{2}$ 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**' ⁽¹⁾/₍₂₎ 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**.

	Y S
📣 Call	Recycling
Select or create a time period:	New Time Period Edit Time Period Delete Time Period
0	K Cancel

We	now	nee	d to	sele	ect th	ne re	quired
time	e peri	iod	in th	ne gi	rid of	f the	Time
Per	iod w	vindo	DW.	•			



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 ¹ 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.

Select the value upon which the decision is based	
SYNTHESYS Call Recy	cling
Times Called C Total number of times called C Total number of times called on the last number C Total number of times called on a named number Times Called in a Time Period C Total number of times called in a time period C Total number of times called in a time period on the last numt C Total number of times called in a time period on a named nun	Miscellaneous C Last call result Time period of the last call Last number dialled Time since queued Time since first called Ti
	OK Cancel

• 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.

Synthesys Call Recy File View Time Pe D D D D D D D D D D D D D D D D D D D	cling codes Help Define Branching Setup decision branching using the tee window below Setup decision branching using the tee window below CFM Data Define Branch New Branch New Branch Defee Branch New Branch Defee Branch Defee Condition	Attackor Attackor Stop Stop Stop Stop Stop Stop	
Ready			2



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

Create Condition Duplicate Conditions Delete Condition View Condition Summary 23 Condition Cr * ΟK Cancel Help 53 Please select an input field that the condition relates to Current DateTime Customer ID FirstName Home Postcode Specific DateTime Surname Title Town Work Help

- **Create Condition.** Click this icon, to create a new condition. To edit existing conditions, double-click on the relevant condition disc.
 - Duplicate condition. Click this icon, to duplicate an existing condition.
- **Delete a condition.** Select the disc that you wish to delete, then click on the 'Delete condition' icon.
- **View condition summary.** Click this icon, to view a summary of all conditions.
 - Move to the next pages of the wizard, first selecting the required operator, i.e. '**between'**, and then specifying the date and time range for your condition.

×	
Current DateTime '	'Current DateTime 'between
Please select an operator from the list below.	Please define date value to be compared with the field Image: Use Calculations • • • • • • • • • • • • • • • • • • •
Key	< >>> Finish Cancel H

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** Dicon.
- 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=ldle, 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** ⁽¹⁾ 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**.

Last cal	Select the value upon which the decision is based SYNTHESYS Call Recy	unotainable → 🐼 cling	
	Times Called C Total number of times called C Total number of times called on the last number C Total number of times called on a named number Times Called in a Time Period C Total number of times called in a time period C Total number of times called in a time period on the last numt C Total number of times called in a time period on a named nun	Miscellaneous C Last call result Time period of the last call Last number dialled Time since queued Time since first called Is tied to an agent CRM Data Phiority	E
	Jnobtaina	OK Cancel	

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.

Pite Verw Tende Pende Help	Synthesys Call Recycling	
Tota notive of loss sale. Let of real Let of real Tota notive of loss sale. Let of real Setup decision benching using file thes window below. Tota notive Tota notive of loss sale. Tota notive of loss sale. New Banch Defer Banch Defe	ile View Time Periods Help	
Lut of real Tel reals of the solution of the s		
	Very Call worker of times called	Last and man Underweite Unde

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'.

ST ••	C	all Recycling
ease select a destination c	ampaign:	CRM Prefix: ELECT
Account	Campaign	Outbound Campaign
Telebusiness Callflows	ElectroCB	Customer Survey
Telebusiness Callflows Telebusiness Callflows	ElectroCB ElectroCB	Sales Brochure FollowUp

• 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.*

Synthesys - Outbound Manager	A is the		(S) - 19 · (#)		-	ma .	LARGE BA	
File Edit View Help								
Queue calls using Selective Queui	ng Import							
A Queue calls using Selective Queuing File Import		Outbound List	Retry Time	Times Cal	Agent ID	Agent Name	Telephone	
Remove Queue calls using Selectiv	ve Queue Monito	or [CRM Recycling	n/a	1	none	None	1212121212
+ Delete SOI Prefixes		L	CRM Recycling	n/a	1	none	None	13232323
Delete SOM Brefiver			CRM Recycling	n/a	1	none	None	12121212
H-			CRM Recycling	n/a	1	none	None	112121212
Process DoNotCallList for entire q	ueue	-	CRM Recycling	n/a	1	none	None	2121212122
Bulk Change Queue		-	CRM Recycling	n/a	5	none	None	12121234343434
Edit Default Recycling Rules			CRM Recycling	n/a	6	none	None	1212121233
Brigitte lest2011	X		CRM Recycling	n/a	1	none	None	1212121212
H Brigitte09	30575	CRMMOD	CRM Recycling	n/a	4	none	None	1212121212
BrigitteJan2012	30575	CRMMOD	CRM Recycling	n/a	5	none	None	12121212
CRM	30575	CRMMOD	CRM Recycling	n/a	0	none	None	
CRM Modify Test	30575	CRMMOD	CRM Recycling	n/a	0	none	None	
CRM Recycling		CRMMOD	CRM Recycling	n/a	0	none	None	
A Date Time	30575	CRIMINOD	CRM Recycling	n/a	0	none	None	101010101010
A More Recycling	30575	CRIMINOD	CRM Recycling	n/a	1	none	News	121212121212
Surname A Town B	00075	CRIMINIOD	CRIVI Recycling	n/a	1	none	None	1212121212121212
CRM Notes Test	20575	CRIMINIOD	CRM Recycling	n/a	2	none	None	1020202020202
CRM SOI SOM test	-7Z 30575	CRMMOD	CRM Recycling	2012-02-20 17:11	5	none	None	121212121212
CRM SOITert	-7Z 30575	TRN 1	CRM Recycling	2012-02-29 17:11	3	none	None	112 234 4444
HTML Email	2Z= 30575	TRN 10	CRM Recycling	2012-02-29 17:11	2	none	None	113 343 4541
Ponscript	2Z 30575	TRN 15	CRM Recycling	2012-02-29 17:11	3	none	None	113 343 4541
- Dopustch	yzZ 30575	TRN 2	CRM Recycling	2012-02-29 17:11	1	none	None	113 343 2322
TestCall Tracker	2Z 30575	TRN 22	CRM Recycling	2012-02-29 17:11	3	none	None	112 112 2211
INAC test	2zZ 30575	TRN 27	CRM Recycling	2012-02-29 17:11	5	none	None	112 010 4333
Prinittelulu/2011	30575	TRN_28	CRM Recycling	n/a	2	none	None	113 443 2321
	30575	TRN_29	CRM Recycling	n/a	2	none	None	113 343 1001
H Gundia tant	30575	TRN_3	CRM Recycling	n/a	3	none	None	112 343 4454
excella test	30575	TRN_32	CRM Recycling	n/a	3	none	None	113 343 9191
	30575	TRN_8	CRM Recycling	n/a	5	none	None	112 234 4333
DAF Inbound Applications	30575	TRN_9	CRM Recycling	n/a	3	none	None	113 343 2321
- B DAF Outbound								
Demonstrationand I rainingScripts								
≓- ⊪ Elliot	▼] < []			III				Þ
/iddle of the Queue. Hit page down for more	records	31 Queu	ie Items.					

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.

Selective Queuing Im	port Utility - Step 1	×
S Y	Y N T H E S Y S Selective Queueing Import	
This step allows yo choose which reco	u to define the selection criteria for the import. This means that you can ds you wish to import from the external database by specifying a set of conditions, or choose Next to import ALL records.	
	Click here for Selection Criteria	
	<u>All Mext > Cancel Help</u>	

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	on Duplicate Conditions
1	Delete Condition View Condition Summar
Se ection Criceria Dar	inition _ 🗆 🗶
* 0 0 🕱 🗉	OK Cancel Help
New condition	
	Please select an input field that the condition relates to:
	FirstName
	Line1
	Line2 Line3
	Line4
	Line6
	PostCode
	Telephone
	Title

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

New condition	New condition	
'PostCode'	'PostCode' containing	
Please select an operator from the list below.	Please define text strings to be com	pared wit
not between like not null is null	SVA	
ending in not ending in containing not containing contained in		
<< >>> Finish Cancel Help	<< >>> Finish	(

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' 칠 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.

ancel

Help

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.

Selective Qu	euing Import Utility - Step 2 🛛 🛛 🗙
8	SYNTHESYS Selective Queueing Import
	In the event of this Outbound List being converted to a Predictive Campaign which telephone Number would you wish to use? HomeTelephone[P005] WorkTelephone[P005]
	< <u>B</u> ack <u>N</u> ext > Cancel Help

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.

Selective Que	euing Import Utility - Step 3	×
	SYNTHESYS Selective Queueing Import	
Do not quet	e call to those who already had any of the following types of call Finished Call - Inbound Aborted Call - Answer phone Aborted Call - Conto call Aborted Call - Do not call Aborted Call - Do not call Aborted Call - Rescheduled Aborted Call - Wrong Number Aborted Call - Other Reason When? C Ever C Since 27/02/2006	
	< <u>B</u> ack <u>N</u> ext> Cancel Help	



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'

Selective Queuing Import U	tility - Step 5 🛛 🗙
	SQI Prefix SQI_78 SQI Name 742232bd-79b8-4 - OBManag Do you wish to: © Queue now © Schedule later in Campaign Manager
	< <u>B</u> ack Finish Cancel Help

- 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.

OBMana	ger	×
	WARNING.	This is a duplicate outbound campaign, when queuing calls use the CRM filter to avoid duplicating calls
		ОК


Selective Queuing Import "SQI"

Selection Criteria Definit	ion _ I X	
* 🔍 🔗 🕱 🗉	Cancel Help	
Postcode SW Surna	me H Battersea	
	Selective Queuing Import Utility - Step 3	×
	SYNTHESYS Selective Queueing Import	
1	Do not queue call to those who already had any of the following types of call Finished Call - Inbound Aborted Call - Answer phone Aborted Call - Busy Aborted Call - Do not call Aborted Call - No Answer Aborted Call - No Answer Aborted Call - No Answer Aborted Call - No Answer Aborted Call - Unobtainable Aborted Call - Unobtainable Aborted Call - Unobtainable Aborted Call - Other Reason When? Ever Since 27/02/2006	
	<u>≺B</u> ack <u>N</u> ext≻ Cancel Help	



SELECTIVE QUEUING IMPORT ("SQI")

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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.

Selective Queuin	ng Import Utility - Step 1
	SYNTHESYS Selective Queueing Import
	Please select a SQI prefix for this import. SQI Name New SQI Outbound Existing
	< Back Next > Cancel Help

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.

Selective Queuing Import Utility - Step 2	
SYNTHESYS Selective Queueing Import	
Please, select an action you would like to perform	
< Back Next > Cancel Help	

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.

Selective Qu	euing Import Utility - Step 3 🛛 🔀
	SYNTHESYS Selective Queueing Import
	Please select a data source from the list below which is to be used as the source for this import.
	< <u>B</u> ack Next> Cancel Help

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

Selective Que	euing Import Utility - Step 4
	SYNTHESYS Selective Queueing Import
	Please select a table or view from the following list
	Cancel Help

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

ctive	Queuing Import Utility - Step 5	
	SYNTHE Selective Qu	SYS ieueing Import
	In the "Alias Column Names" column below names that you may wish to associate with press enter key to save the change.	v, please type in any user-friendly the selected column names and
	Selected Column Names	Alias Column Names 🔺
	Customer ID	Customer ID
	Title	Title
	FirstName	FirstName
	Surname	Surname
	Home	Home
	Work	Work
	Line1	Line1
	Line2	Line2
	Line3	Line3
	(Deals	Nauka Canada Lake

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.





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.

Selection Criceria D	crinition				_ 🗆 ×
0 🖉 🕱 🗉 🗖	_	OK	 0	ancel	Help
New conditio	n				×
					Contraction of the second s
					SESSEE 3
	Please select an input fi	eld that the condition r	elates to:		
	Please select an input fi	eld that the condition r	elates to:		
	Please select an input fi	eld that the condition r	elates to:		
	Please select an input fir	eld that the condition r	elates to:		
	Please select an input fi	eld that the condition r	elates to:		
	Please select an input fi	eld that the condition r	elates to:		
	Please select an input fix	eld that the condition r	elates to:		
	Please select an input fix PostCode	eld that the condition r	elates to:		
	Please select an input fir PostCode FirstName	eld that the condition r	elates to:		
	Please select an input fir PostCode FirstName Line1	eld that the condition r	elates to:		
	Please select an input fir PostCode FirstName Line1 Line2	eld that the condition r	elates to:		
	Please select an input fir PostCode FirstName Line1 Line2 Line3	eld that the condition r	elates to:		
	Please select an input fir PostCode FirstName Line1 Line2 Line3 Line3	eld that the condition r	elates to:		
	Please select an input fir PostCode FirstName Line1 Line2 Line3 Line4	eld that the condition r	elates to:		
	Please select an input fir PostCode FirstName Line1 Line2 Line3 Line4 Line5	eld that the condition r	elates to:		
	Please select an input fir PostCode FirstName Line1 Line2 Line3 Line4 Line5 Line6	eld that the condition r	elates to:		
	Please select an input fir PostCode FirstName Line1 Line2 Line3 Line4 Line5 Line6 PostCode	eld that the condition r	elates to:		
	Please select an input fir PostCode FirstName Line1 Line2 Line3 Line4 Line5 Line6 PostCode Summe	eld that the condition r	elates to:	Helo	
	Please select an input fir PostCode FirstName Line1 Line2 Line3 Line4 Line5 Line6 PostCode Containe6 PostCode Containe6	eld that the condition r	elates to:	Help	

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

Solution: **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 횓 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.

New condition	×	New condition
'PostCode'		'PostCode' containing
Please select an operator from the list below.		Please define text strings to be compared wit
not between like not null is null		SW
ending in not ending in containing not containing contained in		
<< >>> Finish Cancel	Help	K Straight Contraction of the second seco

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' 칠 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.

ncel Help

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.

Selective	e Queuing Import Utility -	Step 8	×
	SYNT Select	「 HESYS tive Queueing Import	
	Assign values to destination Note: Values shown in red r	columns. no longer exist in the callflow and must be	
	Destination	Source	
	Customer ID[P001]	Customer ID	
	Title[P003]	Title	
	FirstName[P004]	FirstName	
	Surname[P006]	Surname	
	•		
	Calculations	Edit Edit	

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.

Selective Que	euing Import Utility - Step 9
	SYNTHESYS Selective Queueing Import
	In the event of this Outbound List being converted to a Predictive Campaign which telephone Number would you wish to use? HomeTelephone[P005] WorkTelephone[P005] WorkTelephone[P006]
	< <u>B</u> ack <u>N</u> ext > Cancel Help

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.

Selective Queuing In	mport Utility - Step 10	×
S Y	YNTHESYS Selective Queueing Import	
Do not queue call to	e those who already had any of the following types of call ished Call - Inbound Finished Call - Outbound orted Call - Answer phone Aborted Call - Busy orted Call - Do not call Aborted Call - No Answer orted Call - Do not call Aborted Call - Unobtainable orted Call - Wrong Number Aborted Call - Other Reason n? Ever Since 27/02/2006	
	< <u>B</u> ack <u>N</u> ext > Cancel Help	



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.

Selective Queuing Import Utility - Step 11	
SYNTHESYS Selective Queueing Import	
A call relating to some of the records that are to be imported may already be queued. This means that these people will be called twice. Do you wish to check for such duplicates in the call queue and exclude them?	
 Check for duplicates (for campaign 'Sales Survey' only) Check for duplicates (for CRM Prefix 'SALSUR' only) Ignore check 	E fi
Clear current queue Clean customers against the Do Not Call List Update all fields	C
< <u>B</u> ack <u>N</u> ext > Cancel Help	

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

Select Option

Check for duplicates (for Outbound list 'Outbound list Name' only)

Check for duplicates (for campaign 'Campaign Name' only)

Check for duplicates (for CRM Prefix 'Customer_Prefix' only)

Ignore check

Clear current queue

Clean customers against the Do Not Call List

Update all fields

Description

To check the current Outbound list selected for duplicates.

To check all Outbound lists associated with the selected Campaign for duplicates.

To check all Outbound lists that use the same CRM prefix.

If you do not need to check for duplicates, for example queuing calls for a new campaign.

To remove customers from the selected outbound list, before queuing calls.

To check the Phoenix_DoNotCallList table for telephone number and to remove customers from the call queue if a match is found.

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

Selective Queuing Import Utility - Step 12	×
SQI Prefix SQI_421 SQI Name SQI Outbound Do you wish to: Import Now Schedule later in Campaign Manager Do not queue calls	
< <u>B</u> ack Finish Cancel	Help

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



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

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



SQI 'Queue only'

Part 1: Enter or select a SQI Name

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

If you select an existing SQI name, the *Import and Queue* or *Queue Only* 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.

Selective Que	euing Import Utility - Step 2
	SYNTHESYS Selective Queueing Import
	Please, select an action you would like to perform C Import and Queue C Queue only
	< Back Next > Cancel Help

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.

Selective Queuing Import Utility - Step 3
SYNTHESYS Selective Queueing Import
Select the Outbound List to queue calls for
< <u>B</u> ack <u>N</u> ext > Cancel Help

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>.

Selective Queuing Import Utility - Step 4	×
SYNTHES	YS
This step allows you to define the selection criteria for the choose which records you wish to import from the exten conditions, or choose Next to import	ne import. This means that you can nal database by specifying a set of it ALL records.
Click here for Selection C	iteria
< <u>B</u> ack <u>N</u> ext	Cancel Help

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.

Create Conditior	Duplicate Conditions	Condition Summar
Se ection Criteria Donni	tion	
New condition	OK	Cancel Help
F	Please select an input field that the condition rel	lates to:
F	'ostCode	
F	irstName ine1	
	ine2 ine4	
	ineo ine6 ostCode	
<< S T T	urname elephone itle	

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.

Selective Que	euing Import Utility - Step 5
	SYNTHESYS Selective Queueing Import
	In the event of this Outbound List being converted to a Predictive Campaign which telephone Number would you wish to use? HomeTelephone[P005] HomeTelephone[P005] WorkTelephone[P006]
	< <u>B</u> ack <u>N</u> ext> Cancel Help

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.

Selective Que	uing Import Utility - Step 6	×
	SYNTHESYS Selective Queueing Import	
Do not queu	e call to those who already had any of the following types of call Finished Call - Inbound Finished Call - Outbound Aborted Call - Answer phone Aborted Call - Busy Aborted Call - Do not call Aborted Call - No Answer Aborted Call - Rescheduled Aborted Call - Unobtainable Aborted Call - Wrong Number Aborted Call - Other Reason When? Ever Since 27/02/2006	
	< <u>B</u> ack <u>N</u> ext > Cancel Help	



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.

Selective Queuing Import Utility - Step 7	
SYNTHESYS Selective Queueing Import	
A call relating to some of the records that are to be imported may already be queued. This means that these people will be called twice. Do you wish to check for such duplicates in the call queue and exclude them? Check for duplicates (for ob list 'Sales Survey' only)	
C Check for duplicates (for CRM Prefix 'SALSUR' only) C Ignore check C Ignore check	
Update all fields < Back	

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

Select Option

Check for duplicates (for Outbound list 'Outbound list Name' only)

Check for duplicates (for campaign 'Campaign Name' only)

Check for duplicates (for CRM Prefix 'Customer_Prefix' only)

Ignore check

Clear current queue

Clean customers against the Do Not Call List

Update all fields

Description

To check the current Outbound list selected for duplicates.

To check all Outbound lists associated with the selected Campaign for duplicates.

To check all Outbound lists that use the same CRM prefix.

If you do not need to check for duplicates, for example queuing calls for a new campaign.

To remove customers from the selected outbound list, before queuing calls.

To check the Phoenix_DoNotCallList table for telephone number and to remove customers from the call queue if a match is found.

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'

Selective Queuing Import Uti	lity - Step 8 🛛 🗙	
	SQI Prefix SQI_52 SQI Name SQI Outbound Do you wish to: © Queue now © Schedule later in Campaign Manager	Rem the S you v wher repo Mana
	< <u>B</u> ack Finish Cancel Help	

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.

In Compiler Manager	
Campaign Manager	
File View Help	
💾 🗢 🚳 🗮 😉 💿	
All Accounts Image: State of the state of t	Report Name BR SQI Outbound ID NONE Connext SQI File Import Connext SQI File Import Fold Name SQI File Import Browse Reports Report Tool SQI Service Format Browsy Prives/Export File Name (e.g. %dtm/sy for dated filenames) SQI Outbound Output Teol format Parameter) Parameter1 Parameter2 Save Delete
Keady	NUM



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.

	Selective Queueing Import		
You have now so information below reports.	cheduled BR SQI Outbound report to run. Please check that the r is correct, particularly the next run date and time fields for timed		
Frequency	every set number of days		
Next Run Date	Monday, 17 Nov 2014		
Next Run Time	18:30		
Parameter 1			
Parameter 2			
Parameter 1			

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 Que	uing Import Utility - File Import Step 2		
	SYNTHESYS Selective Queueing Import		
	Please, specify a name of source file to be imported \\NEWBLUEDB\Synthesys\Training\VoucherID.c Browse Row Delimiter: {CR}{LF} Sample data from the file:		
	Selection Criteria Definition		
		Cancel	Help
	Postcode SW Surname H Battersea		_
			- -



SELECTIVE QUEUING FILE IMPORT ("SQI")

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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.

elective Qu	seuing Import Utility - File Import Step 2
	Please, specify a name of source file to be imported [\\NEWBLUEDB\Synthesys\Training\VoucherID.c Row Delimiter: [CR]{LF]
	Sample data from the file: Customer/D, Title, FirstName, Sumame, Home, Work, IRat, Street, I ~ VOUCHER: 1. Mr. John, Smith, 112, 234, 4444, 221, 234, 4444, Flat VOUCHER: 2. Ms, Betty, Wales, 113, 343, 2322, 221, 343, 2322, VOUCHER: 3. Dr, Tom, Gage, 112, 343, 4454, 222, 343, 4454, 122
	Kack Next > Cancel Help

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.

Selective Qu	elective Queuing Import Utility - File Import Step 3			x	
	SYNTHESYS Selective Queueing Import				
	Choose the delimi	ter that separat C Semicolo ns field names ne file:	es your fields:	a	
	CustomerID VOUCHER_1 VOUCHER_2 VOUCHER_2	Title Mr Ms	FirstName John Betty T	S	
	_	< Back	Next >	Cancel Help	

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.

Selective Qu	euing Import Utility - File Import Step 4 SYNTHESYS Selective Queueing Import
	Please specify a table name VoucherID Browse Drop the Table First
	< Back Next > Cancel Help

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

Selective Que	Selective Queuing Import Utility - File Import Step 6		
	SYNTHESYS Selective Queueing Import		
	You have successfully completed SQI File Import Wizard. The file you chose has been successfully imported. To close this wizard click Next. Summary: Source file: \\NEWBLUEDB\Synthesys\Training\VoucherID.cs Destination Table: VoucherID		
	< Back Next > Cancel Help		



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.

Selective Queuir	Selective Queuing Import Utility - Step 7			
8 ↓ ↓	SYNTHESYS Selective Queueing Import			
	Please select a SQI prefix for this import. SQI Name Rew BRFileSQI Existing			
	< Back Next > Cancel Help			

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.

Selective Queuin	Selective Queuing Import Utility - Step 8		
	SYNTHESYS Selective Queueing Import		
F	Please, select an action you would like to perform C Import and Queue C Queue only		
	< Back Next > Cancel Help		



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.

Selective Que	Selective Queuing Import Utility - Step 9		
₿	SYNTHESYS Selective Queueing Import		
	Please select a data source from the list below which is to be used as the source for this import. Phoneyx		
	< Back Next > Cancel He	lp	

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.

Selective Que	uing Import Utility - Step 10
5	SYNTHESYS Selective Queueing Import
	Please select a table or view from the following list VoucherID (owner(dbo)) and then select all columns that are to be used in the course of the import either for selection or output. Select All Unselect All Unselect All Sumame III Sumame III
	< Back Next > Cancel Help

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.

Selective	ielective Queuing Import Utility - Step 11			
	In the "Alias Column Names" column below names that you may wish to associate with it press enter key to save the change. Selected Column Names Colutioner10 Title First Name Sumame	, please type in any user-friendly the selected column names and Alas Column Names CustomerID Title FirstName Sumame		
	Postcode Postcode			

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

Solution: **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.

'PostCode'			
	Please select an operator f	rom the list below.	
	not between	_	
	like not null		
	is null ending in		
	not ending in		
	not containing		
	contained in	-	
		s I court II	11 ala

Please defir	ne text strings	to be compare	ed with the fiel	d
sw				-

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.



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.

Selective Queuing Import Utility - Step	14	×
SYNT	HESYS re Queueing Imp	ort
Assign values to the destination Note: Values shown in red no lo	columns. nger exist in the callflow and must be re	placed
Destination	Source	â
Customer ID[P001]	CustomerID	-
First Name[P002]	Title	=
Sumame[P003]	Sumame	
Telephone[P004]	FirstName	
•		
Calculations	▼ Ed	it
< Bac	k Next > Cancel	Help

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.

Selective Queuing Import Utility - Step 15
SYNTHESYS Selective Queueing Import
In the event of this Outbound List being converted to a Predictive Campaign which telephone Number would you wish to use? Home[P004] Home[P004] Work[P007]
< Back Next > Cancel Help

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.

Selective Queuing Import Utility - Step 16
SYNTHESYS Selective Queueing Import
Do not queue call to those who already had any of the following types of call Finished Call - Inbound Aborted Call - Answer phone Aborted Call - On ot call Aborted Call - On ot call Aborted Call - Rescheduled Aborted Call - Rescheduled Aborted Call - Unobtainable Aborted Call - Wrong Number Other Reason When? C Since 17/11/2014
< Back Next > Cancel Help



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.

Selective Queuing Import Utility - Step 17
Selective Queueing Import
A call relating to some of the records that are to be imported may already be queued. This means that these people will be called twice. Do you wish to check for such duplicates in the call queue and exclude them? • Check for duplicates (for ob list 'BDJ DB Import' only)
Check for duplicates (for Campaign DB import only)
C Ignore check
Clear current queue Clean customers against the Do Not Call List Update all fields
< Back Next > Cancel Help

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

Select Option

Check for duplicates (for Outbound list 'Outbound list Name' only)

Check for duplicates (for campaign 'Campaign Name' only)

Check for duplicates (for CRM Prefix 'Customer_Prefix' only)

Ignore check

Clear current queue

Clean customers against the Do Not Call List

Update all fields

Description

To check the current Outbound list selected for duplicates.

To check all Outbound lists associated with the selected Campaign for duplicates.

To check all Outbound lists that use the same CRM prefix.

If you do not need to check for duplicates, for example queuing calls for a new campaign.

To remove customers from the selected outbound list, before queuing calls.

To check the Phoenix_DoNotCallList table for telephone number and to remove customers from the call queue if a match is found.

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

Selective Queuing Import Utility - Step 18	
SYNTHESYS Selective Queueing Import	
SQI Prefix SQI_1220 SQI Name BRFileSQI Do you wish to:	Remen the SQ will nee schedu the Ca
< Back Finish Cancel Help	

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

iew Help leve calls using Selective Queuing Import leve calls using Selective Queuing File Import move Queue calls using Selective Queue Monitor lete SQI Prefixes lete SQN Prefixes socess DoNotCallList for entire queue lk Change Queue it Default Recycling Rules etb Queueing	Outbound List Retry Time BLOan OB extent n/a	Times Cal Agent ID 0 none 0 none 0 none 0 none 0 none	Agent Name	Telephone 112 344 6771 113 454 5227 113 454 7999	
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cess DoNotCallList for entire queue Ik Change Queue it Default Recycling Rules eb Queueing	BLOan OB extent n/a BLOan OB extent n/a BLOan OB extent n/a BLOan OB extent n/a	0 none 0 none			
Ik Change Queue It Default Recycling Rules eb Queueing	BLOan OB extent n/a BLOan OB extent n/a BLOan OB extent n/a	0 none		113 363 7855	
IK Change Queue it Default Recycling Rules eb Queueing	BLOan OB extent n/a BLOan OB extent n/a			112 344 6776	
it Default Recycling Rules 2b Queueing	BLOan OB extent n/a	0 none		113 454 5333	
eb Queueing	PLOan OR extent n/a	0 none		112 262 444	
to Queueing	BLOan OB extent 2013-01-11 09-31	0 none	None	112 234 1111	
BLoan NoMatch BLOan OB extentedHrs Day Time test	BLOan OB extent 2013-01-11 22:00	0 none	None	113 343 2334	
on Criteria	1-		l		23
		ок	Cancel	F	lelp
Please select an i Customer ID Customer ID Email Tel First Name Street Surname Telephone	input field that the condi	tion relates to:			
Town	Finish	Cancel	Hal		
	Please select an i Please select an i Customer ID Customer ID Customer ID First Name Street Sumame Telephone Title Fown / /	Please select an input field that the condi Customer ID Email Tel First Name Street Surname Telephone Title Town	Please select an input field that the condition relates to: Customer ID Customer ID Email Tel Finist Name Street Surname Telephone Title Town Enisth Cancel	Please select an input field that the condition relates to:	Please select an input field that the condition relates to:



WEB QUEUING – THE WEB QUEUE WIZARD

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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.

Ç Sy	nthes	ys - Out	tbound Manager	-11 - 1 - 12 - 1 - 12 - 1 -	14 · 1 · 15 · 1 · A ·	/	1 (APT R	erearch	- 0 X
File	Edit	View	Help						
D		Queue	calls using Selective Queuing Import						
A		Queue	calls using Selective Queuing File Import	Outbound List	Retry Time	Times Cal	Agent ID	Agent Name	Telephone
Ē.		Remov	e Queue calls using Selective Queue Monitor	BLOan OB extent	n/a	0	none	1.3	112 344 6771
Ē		Delete	SOI Prefixes	BLOan OB extent	n/a	0	none		113 454 5227
Ē.		Delete	SOM Draftwar	BLOan OB extent	n/a	0	none		113 454 7999
Ē.		Delete	SQIVI PTEIIXES	BLOan OB extent	n/a	0	none		113 363 7855
1		Proces	s DoNotCallList for entire queue	BLOan OB extent	n/a	0	none		112 344 6776
		Bulk Cl	hange Queue	BLOan OB extent	n/a	0	none		113 454 5333
		Edit Default Recycl	fault Recycling Rules	BLOan OB extent	n/a	0	none		113 454 7383
		cuitoc	and the contract of the contra	BLOan OB extent	n/a	0	none		113 363 4444
		Web Q	ueueing	BLOan OB extent	2013-01-11 09:31	0	none	None	112 234 1111
	1	BLoa	an NoMatch an OB extentedHrs	BLOan OB extent	2013-01-11 22:00	0	none	None	113 343 2334
Time test									



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.

Web Queue Wizard - Step 1	x
SYNTHESYS Web Queueing	
Please select a prefix.	
© New BRLoan Delete	
< Back Next > Cancel Help	

Step 2: Selecting Outbound list for lead

In the next page of the wizard

٠

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

Web Queue Wizard - Step 2 SYNTHESYS Web Queueing
Select Match Outbound List
BR February2013 BR WebChat CRM prefix is 'BLOAN' CRM prefix is 'BLOAN' CRM prefix is 'BLOAN' CRM prefix is 'BLOAN'
BLOan OB extentedHrs Day Time test
< Back Next > Cancel Help



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.

Web Queue Wizard - Step 3	×
SYNTHESYS Web Queueing	
For 'Matching customers' select a condition	
Click here to set your condition	
Cancel	Help

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

Create Condition	Duplicate Conditions Delete Condition	View Cor	dition Summary
Condition Criteria			
* <u>> 8 x e</u>		OK Ca	ncel Help
	Please select an input field that the Customer ID Email Tel First Name Street Surname Telephone Title	condition relates to:	
	<< >>> Finish	Cancel	Help
			-

- **Create Condition':** Create a new condition. To edit existing conditions, doubleclick on the relevant condition disc.
- Solution: Ouplicate 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.

'PostCode'				
	Please select an	operator from the li	ist below.	
	not between like not null		-	
	ending in not ending in containing			
	not containing contained in		•	

				×				
'Town' alphab	etically prefixed w	ith						
	Please define text strings to be compared with the field							
	>>	Finish	Cancel	Help				

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.
- Condition Criteria 🏂 🔉 🔗 🕱 🗉 пκ Help Cancel Each condition disc London New Contact can be manipulated, clicking and dragging it around the canvas HomeOwner If two discs are overlaid completely, press Control on the keyboard to drag them apart.
- To edit existing conditions, double-click on the relevant condition disc.

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.

Web Queue Wizard - Step 4
SYNTHESYS Web Queueing
Do not specify this Outbound List Select NOT Matched Outbound List
CRM prefix is 'BLOAN'
BLOan OB extentedHrs Day Time test
< Back Next > Cancel Help

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.

Web Queue Wizard - Step 5		
**	Prefix WQE_2 Name BRLoan	QueuingPrefix parameter is <wqe_2></wqe_2>
	You choose to do the following action: WQ Prefix: WQE_2 Match Outbound List - BLOan OB extentedHrs Not Match Outbound List - BLoan NoMatch	
	< Back Finish Cancel Help	





VIEWING QUEUED CALLS

🔊 Synthesys - Outbound Manager 📃 🗆 🗙									
<u>File Edit View H</u> elp									
□ ☞ 🖬 ½ 🖻 🖻 🔗 😵 🛃									
All Accounts	ID	Customer ID	Outbound List	Retry Time	Times Called	Agent ID			
🗄 👘 DemonstrationandTrainingScripts	87	ELECT_15	CBout	n/a	0	none			
E Felebusiness Callflows	8	ELECT_2	CBout	n/a	0	none			
ElectroBuy	9	ELECT_3	CBout	n/a	0	none			
	8 10	ELECT_4	CBout	n/a	0	none			
Electer Factor	8 11	ELECT_5	CBout	n/a	0	none			
	9 14	ELECT_8	CBout	2009-08-13 17:16	0	none			
All Groups	9 15	ELECT_9	CBout	2009-08-13 17:16	0	none			
	₂ z Z ₁₂	ELECT_6	CBout	2009-08-12 17:57	0	none			
	₂ z Z 13	ELECT_7	CBout	2009-08-12 17:57	0	none			
	<u>A</u> 1	ELECT_1	CBout	n/a	1	none			
	222	ELECT_10	CBout	n/a	1	none			
	223 3	ELECT_11	CBout	n/a	1	none			
	283 4	ELECT_12	CBout	n/a	0	none			
	223 5	ELECT_13	CBout	n/a	0	none			
	2 6	ELECT_14	CBout	n/a	0	none			
	16	ELECT_1	CBout	2001-06-21 12:05	1	1000			
	4 17	ELECT_10	CBout	n/a	0	none			
	•					Þ			
, Middle of the Oueue, Hit page down for more records		17 Queue	e Items.						



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

lcon	Description	Queue State
8	Done : refers to outbound calls, which have been completed.	0
8	Queued : a <i>green light</i> lists the <i>active</i> calls in the queue waiting to be taken; the <i>red light</i> lists the <i>inactive / deactivated</i> calls	1
Ø	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
7	Never Call : lists all clients, which do not wish to be contacted.	4
'	Running : shows the number of outbound calls in process.	5
₂ z Z	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
à	Unobtainable Number : if number is not obtainable.	10
PRE	Predictive Call in progress / running	11
88	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 <i>control</i> 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

Synthesys - Outbound Manager	STILL ST	0	and the second		2 4	3		Same *	- 0 X	
File Edit View Help										
All Accounts	*	ID	Customer	Outbound List	Retry Time	Times Cal	Agent ID	Agent Name	Telephone	
🕀 🕞 AJN Test Centre		2zZ30758	TRN_11	Lead List	2012-06-22 17:11	0	none	None	112 344 6771	
🕀 🕞 Allianz		₂z Z 30758	TRN_12	Lead List	2012-06-22 17:11	0	none	None	113 454 5227	
🕀 🕞 Arvato BCA		₂z Z 30758	TRN_14	Lead List	2012-06-22 17:11	0	none	None	113 363 7855	
🕀 🕞 Brentford Dry Docks		₂z Z 30758	TRN_16	Lead List	2012-06-22 17:11	0	none	None	112 344 6776	
		2zZ 30758	TRN_17	Lead List	2012-06-22 17:11	1	none	None	113 454 5333	
🗉 👘 Brigitte Telebusiness		2zZ 30758	TRN_18	Lead List	2012-06-22 17:11	2	none	None	113 454 7383	
🕀 🛱 Brigitte Test 2010	Ξ	2zZ 30758	TRN_19	Lead List	2012-06-22 17:11	1	none	None	113 363 4444	
🗊 🛱 Brigitte Test2011		30758	TRN_5	Lead List	2012-06-22 17:37	1	none	None	223 454 5757	
		30758	TRN_13	Lead List	2012-06-26 17:06	1	none	None	113 454 7999	
E BrigitteJan2012		30758	TRN_23	Lead List	n/a	1	none	None	112 555 6774	
E BrigitteJuly2011		30758	TRN_24	Lead List	n/a	1	none	None	110 454 5757	
Brigitteluly2012		= 30758	TRN_25	Lead List	n/a	1	none	None	113 111 7797	
Exchange Diary		30758	TRN_26	Lead List	n/a	1	none	None	113 363 1010	
Lead OB		30758	TRN_30	Lead List	n/a	1	none	None	113 443 2321	
		30/58	TRN_31	Lead List	n/a	1	none	None	113 224 5227	
		30/58	TRN_33	Lead List	n/a	1	none	None	112 222 6/71	
		30/58	TRN_34	Lead List	n/a	1	none	None	113 454 5777	
t lead list		-, 30/38	TRN_4	Lead List	n/a	1	none	None	112 344 0774	
		20750	TEN 7	Lead List	n/a	1	none	None	113 434 7797	
		20750	TEN 7	Lead List	n/a	1	none	None	112 262 7977	
		20750	TRN_7	Lead List	n/a	2	none	None	112 454 7707	
		20750	TENI 21	Lead List	n/a	2	none	None	112 224 5227	
Caseb044		M 20720	1101_01	Lead List	iiya	2	none	NUTE	113 224 3227	
DAF Inbound Applications										
DAF Outbound										
ter dazza										
DemonstrationandTrainingScripts										
Elliot										
🖶 👘 Emmanuel										
🗄 👘 Export Test Joe										
庄 🔂 Gareth										
i∰ 🞁 h6544										
🖶 👘 Healthcare Landscapes										
🖶 🔂 Highway	-	•			III				Þ	
Middle of the Queue. Hit page down for more	e rec	ords	23 Queu	e Items.						

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.

IC)	Customer	Outbound List	Retry Time	Times Cal	Agent ID	Agent Name	Telephone
8	30758	TRN_18	Second CRM	n/a	0	none		113 454 7383
8	30758	TRN_19	Second CRM	n/a	0	none		113 363 4444
8	30758	TRN_2	Second CRM	n/a	0	none		113 343 2322
8	30758	TRN_20	Second CRM	n/a	0	none		112 234 1111
8	30758	TRN_21	Second CRM	n/a	0	none		113 343 2334
8	30758	TRN_22	Second CRM	n/a	0	none		112 112 2211
8	30758	TRN_23	Second CRM	n/a	0	none		112 555 6774
8	30758	TRN_24	Second CRM	n/a	0	none		110 454 5757
8	30758	TRN_25	Second CRM	n/a	0	none		113 111 7797
8	30758	TRN_26	Second CRM	n/a	0	none		113 363 1010
8	30758	TRN_27	Second CRM	n/a	0	none		113 443 2321
8	30758	TRN_28	Second CRM	n/a	0	none		113 443 2321
8	30758	TRN_29	Second CRM	n/a	0	none		113 443 2321
٥	30758.	Schedule			0	none		112 343 4454
2	30758.	Schedule		2-09-18 12:33	1	1153	jo	113 343 4541
ž	30758.	Sleep		2-09-18 12:33	1	1153	jo	112 344 6771
2	30758.	Delete		2-09-18 12:38	3	1153	jo	113 454 5777
z	30758.	Delete		2-09-17 16:45	2	none	None	221 234 4444
÷	30758.	Customer	History		1	none	None	113 454 5227
۲	30758.	Customer	Details		3	none	None	113 454 7999
-	30758.	customer	Details		1	none	None	113 363 7855
2	30758.	Properties	;		1	none	None	113 343 4541
2	30758.	Change St	tate		1	none	None	112 344 6776
×.	30758.	Move To	Outbound List		1	none	None	113 454 5333
-	30758.	Trace	led to formation		2	none	None	112 222 6771
-	30758.	Times Cal	lied information		2	none	None	112 344 6774
2	30758	TRN_5	Second CRM	n/a	2	none	None	113 454 5757

То

Select Option

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 <i><de-assign agent=""></de-assign></i> . Due Sleeping calls assigned to an operator will change to Reschedule state.
Schedule/Reschedule	Display the <i>Schedule Call</i> 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 <i>Attention</i> supervisor to <i>Queued</i> .
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'.

vent	Event	Event	Operat	Account	Campai	OBCam	
Import	28/01/2	Inserted					
Call Q	30/01/2	Call 189	Brigitte				
I/B Call	30/01/2	Brochure	Brigitte				
I/B Call	30/01/2	Enquiry	Brigitte				
I/B Call	30/01/2	Order	Brigitte				
I/B Call	30/01/2	Order	Brigitte				

- 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.

History for the	customer BRTI	ES_2 [BR	TIES]		
Event Even	Event	Operat.	Account Camp	ai OBCam	
(\$1/8 Call 30/01	/2 Order	Brigitte			
				1	
Add Note			Attach	<u>Filter>></u>	
Add <u>N</u> ote			<u>Attach</u> Time Interval	<u>F</u> ilter>>	
Add Note		×		<u>Filter>></u>	
Add <u>Note</u> vent (Not Active>		¥		<u>Filter>></u>	
Add Note		•	Attach Lime Interval Date From 2004 / 30 / 01 To 2004 / 30 / 01	<u>Filter>></u>	
Add Note vent (Not Active> (Not Active> vent Tegt		•	Attach Lime Interval From 2004 / 30 / 01 To 2004 / 30 / 01	<u>Filter>></u>	1



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.

ID	Customer ID	Outbound Campaign	Retry Time	Times Called	Agent ID
8 20424	. BRFlat_7	Ties OB	n/a	0	none
20424	. BRFlat_3	Ties OB	n/a	0	none
20424	. BRFlat_2	Ties OB	n/a	0	none
20424	. BRFlat_4	Ties OB	n/a	0	none
20424	. BRFlat_10	Ties OB	n/a	0	none
8 20424	BRFlat_11	Ties OB	n/a	0	none
2Z20404		Tine OD	2008-02-29 11:15	0	1035
₂ zZ ₂ Up	erator Assign		2008-02-29 11:15	0	1035
₂ zZ ₂ Uns	неер на сощита		2008-02-29 11:15	0	1035
882	ange the Call Tim	e	n/a	0	none
Del Del	ete		n/a	0	none
<u>^</u> 2			n/a	0	none
A Cus	tomer History		n/a	0	none
Cus	tomer Details				
Pro	percies				
Cha	inge state				
Mor	/e To Outbound	Lampaign			

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

Change Queue Items State	×
New Queue Item State:	
Attention	
Accendion	
Attention	▲
Done	
NeverCall	
Queued	
Scheduled	



Move to Outbound List

The most efficient way to move queued calls from one Outbound list to another is by using the <u>Queue Manipulation Wizard</u> (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.

ID	Customer ID	Outbound List	Retry Time	Times Called
86	ELECT_14	CBout	n/a	0
87	ELECT_15	CBout	n/a	0
8	ELECT_2	CBout	n/a	0
8 10	ELECT_4	CBout	n/a	0
12	ELECT_6	CBout	n/a	0
8 13	ELECT_7	CBout	n/a	0
8 15	ELECT_9	CBout	n/a	0
2z ² 2	ELECT_10	CBout	2009-09-10 15:33	1
2ZZ	FLECT 11	CBout	2009-09-10 15:36	1
₂zZ Del	lete		2009-09-10 15:50	1
Ch Ch	ange State		n/a	1
🕿 Mo	ve To Outbound L	ist	n/a	0
pee -	ELECT_3	CBOOK	n/a	0
14	ELECT 8	CBout	n/a	0

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

Move To Ducbound List Please, Select Destination Outbound List with Custor All Accounts Characteristic Califlows Chout Chout Mew OB list	Selected Item: Account ID: Account ID: Campaign ID: Campaign: OBList ID: OBList: Customer Prefix:	ELECT 2 Telebusiness Califlov 6 ElectroCB 4 New OB list ELECT
ОК	Cancel	

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

🕼 Synthesys - Outbound Manager					
Eile Edit <u>V</u> iew <u>H</u> elp					
🗅 🛩 🖬 X 🖻 🖻 🔗 🎖 👌 👬					
All Accounts	ID	Customer ID	Outbound List	Retry Time	Times Called
🕀 😰 Darroll	8 20022	ELECT_10	New OB list	n/a	0
🕀 😥 DemonstrationandTrainingScripts	8 20023	ELECT_11	New OB list	n/a	0
🕀 😥 dfdsfds	20024	ELECT_12	New OB list	n/a	0
E Telebusiness Callflows	8 20025	ELECT_1	New OB list	n/a	0
ElectroBuy					
CBout					
New OB 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 **<u>Queue Manipulation Wizard</u>** (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.

🗘 Synthesys - Outbound Manager											
File Edit View Help											
All Accounts	*	ID	Customer ID	Outbound List	Retry Time	Times Called for this list	Agent ID	Agent Name	Telephone	Total Times Called	
😥 📦 AJN Test Centre		30789	3	Move from SW	2013-01-02 16:18	2	none	None	1121212122	2	
🗄 👘 Allianz		2zZ 30789	10	Move from SW	2013-01-02 15:49	2	none	None	35353535	2	
🗄 😰 Arvato BCA		22 2 30789	6	Move from SW	2013-01-02 15:50	2	none	None	3636363636	3	
E BR October2012		2 ^Z Op	erator Assign	1	2013-01-02 15:50	2	none	None	2134345678	2	
🖻 👆 CRM PDTest		2 ² Un:	sleep	1	2013-01-02 15:51	2	none	None	2626262779	3	
BR TimeMissed	Е	Pi Chi	ange the Call Tir	ne	n/a	1	none	None	2312312133	1	
Missed Latest Time		Del	lete								
Move from SW		Cu	stomer History								
Not SW		C	stomor Dotails								
SW SW		-	storrier Details								
Export SQI		Pro	perties								
Express Loan		Chi	ange State								
Popwatch test		Mo	ve To Outbound	d List							
Brentiord Dry Docks		Tin	nes Called Inform	nation							
Brighte Oct2011											
Brighte Telebusiness											
Prigitte rescorr											
E Camalia test											
m m caraf5M											
A DAE Inhound Applications											
DAF Outbound											
B dazza											
DemonstrationandTrainingScripts											
Elliot											
Emmanuel											
Export Test los											
Gareth											
	Ψ.	•				III				•	
Middle of the Queue. Hit page down for mo	ore re	cords	6 Queue	Items.							

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**.

Dialog	X
Number of times called for this Queue Id: 0	
Number of times called for this Lead Id: 1	
Number of times called for this Customer: 1	
	ОК



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.

ID	Customer ID	Outbound List	Retry Time	Times Called	Agent ID
8 7637	BRCity_9	City Break Queue	n/a	0	none
8 7639	BRCity_11	City Break Queue	n/a	0	none
8 7640	BRCity_12	City Break Queue	n/a	0	none
8 7641	BRCity_13	City Break Queue	n/a	0	none
8 7642	BRCity_14	City Break Queue	n/a	0	none
₂z Z 7638	BRCity_10	City Break Queue	2009-08-28 11:40	0	none
7629	BRCity_1	City Break Queue	n/a	0	none
7630	BRCity_2	City Break Queue	n/a	0	none
7631	BRCity_3	City Break Queue	n/a	0	none
A7600	Doctor 4	pk Queue	n/a	0	none
<u>Å</u> 76	Ouque	ak Queue	n/a	0	none
4 76	Queue	ak Queue	n/a	0	none
<u>A</u> 76	Delete	ak Queue	n/a	0	none
220 76	Gustomor History	ak Queue	n/a	0	none
	Customer History				
	Properties				
	Change State				
	Move To Outbourg	1 Liet			
_		List			
•					Þ

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*.

🕻 Synthesys - Outbound Manager								- 0 %
File Edit View Help								
D 📽 🖬 X 🖻 🖻 🔗 💡 🛃	ţ							
S All Accounts	ID	Customer	Outbound List	Retry Time	Times Cal	Agent ID	Agent Name	Telephone
🗊 😰 AJN Test Centre	30758	TRN_18	Second CRM	n/a	0	none		113 454 7383
🗈 🗊 Allianz	30758	TRN_19	Second CRM	n/a	0	none		113 363 4444
🗈 🤀 Arvato BCA	30758	TRN_2	Second CRM	n/a	0	none		113 343 2322
Brentford Dry Docks	30758	TRN_20	Second CRM	n/a	0	none		112 234 1111
Brigitte Oct2011	30758	TRN_21	Second CRM	n/a	0	none		113 343 2334
Brigitte Telebusiness	30758	TRN_22	Second CRM	n/a	0	none		112 112 2211
Brigitte Test2011	30758	TRN_23	Second CRM	n/a	0	none		112 555 6774
Rigittelan2012	30758	TRN_24	Second CRM	n/a	0	none		110 454 5757
- Brinittaluk 2012	30758	TRN_25	Second CRM	n/a	0	none		113 111 7797
Bigitteduy2012	30758	TRN 26	Second CRM	n/a	0	none		113 363 1010
	30758	TRN 27	Second CRM	n/a	0	none		113 443 2321
CRM History lest	30758	TRN 28	Second CRM	n/a	0	none		113 443 2321
CRM SanityCheck	30758	TRN 29	Second CRM	n/a	0	none		113 443 2321
CRM Sanity	30758	TRN 3	Second CRM	n/a	0	none		112 343 4454
Data Viewer	30758	TRN 10	Second CRM	2012-09-18 12:	33 1	1153	io	113 343 4541
Exchange Diary	3075		Charles and a company of the second s		100 E	1000000		112 344 6771
- State - B Reschedule test	3075 Vie	w Options	(management) (100000)	STATUTE AND ADDRESS	dan Sa	(Inclusion of the second secon		113 454 5777
👆 Lead Inbound	2Z ² 3075						le	221 234 4444
🕀 💊 Lead Tracking3	3075	- Show items wi	ith status				le	113 454 5227
LeadTracking	⇒ 3075	🔀 🗆 Do	me 🛅 🗆	Ünobtainable 💡	Wrong Num	ber		113 454 7999
I A LeadTracking?	3075			PEC.				113 363 7855
New CPM Chark	3075	UL UL	ieued 🙇 I	Never Lali 👳	Predictive U	all in Progress		113 343 4541
New CRW Crieck	3075	🕅 🔽 Sc	heduled 🤓 🗆	Bunnina 🗱	E Recycling C	omplete		112 344 6776
	3075	<u> </u>		-				113 454 5333
IN THE INEW CRIVIS	3075	🔥 🗌 Att	ention ₂ z4	Sleeping 🥩	Emergency		in the second se	112 222 6771
Queue test OB	3075		have				-	112 344 6774
Queue l est	3075	Page 1 MIC	Jieu				-	113 454 5757
Second New CRM								
- 🚠 BTst Move		OK	Cance	I Select	all Clea	rall		
- 🚠 Move xCalled								
📩 📩 Second CRM								
🗄 🔞 Bull								
🗊 😰 Camelia test								
- 🛱 case6544								
DAF Inbound Applications								
Middle of the Queue. Hit page down for more i	ecords	27 Quer	ue Items.					

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

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

ID	Customer	Outbound List	Retry Time	Times Cal	Agent ID	Agent Name	Telephone
30758	TRN_10	Second CRM	2012-09-18 12:33	1	1153	jo	113 343 4541
307	Operator Ass	ian	2012-09-18 12:33	1	1153	jo	112 344 6771
<u> 307</u>	Reschedule	-	2012-09-18 12:38	3	1153	jo	113 454 5777
	Change to Queued State Delete Customer History Customer Details						
	Properties						
	Change State	2					
	Move To Out	tbound List					

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.

C _o S	ynth	esys - Outbound Ma	nager							- 🗆 ×
File	Edit	View Help								
	e 🖬	✓ Status Bar								
	L Acco	Call queue		~	Customer ID	Outhound List	Rota: Time	Timor	Acont ID	Acont Name
	AIN '	 Explorer style 		2276705	VOUCHER Z	CRM File Import	n/a	2	none	None
i i i	Allia	Sot Filtor		2276791	VOUCHER 34	CRM File Import	n/a	1	none	None
i i i i i i i i i i i i i i i i i i i	Arva	Cat Casada Filter		2276790	VOUCHER 33	CRM File Import	n/a	1	none	None
i i i i i i i i i i i i i i i i i i i	Bren	Set Search Filter		2276789	VOUCHER_31	CRM File Import	n/a	1	none	None
l 🖥 🔞	Brigit	Cancel Hitter		2276788	VOUCHER_30	CRM File Import	n/a	1	none	None
i 🗄 🖻	Brigi	Statistics		2276787	VOUCHER_26	CRM File Import	2011-04-19 17:43	1	none	None
ė-¢	Brigit	Set Page Size		2276786	VOUCHER_25	CRM File Import	2011-04-19 17:43	1	none	None
	- 💊 C	Display Inactive OBCam	paigns	22767**	VOLICUED 34	CDM File Import	2011-04-10 17:42	7		None
Ė	🔶 C	RM ImportTest	- I 😹 🕻	22767	ieue Sear	ch Filter			XII	None
	- fi	B CRM DBImp	- II&:	22/6/						None
	e	GRM File Import	185	22767						None
	- 🔶 C	RM Notes	∰2	22767	Parama	tor				None
	- 🔶 C	RM Notes2	2 T	22767	Falanie	aca.				None
E E	- 🔶 C	RM Test	8 2	22767	Custor	oor ID		-		
	• 🐤 C	RMTest April	8 2	22767	Custor	nerio				
	- 🔶 C	RMTest March11	8 2	22767	Agent	ID				
	- 🄶 D	B ServiceTest	8 2	22767	Agent	ID .				
	- 🔶 D	elete CRMPrefix	2	22767	Agent	Name				
	• 🐤 D	eleteCampaign	2	22767	(Divelop	sor ID				
	- 🐤 E	dit SQI		22/6/	CONSIGN					
	- - L	ftRepair Survey		22/0/	Queue	ID				
	- N	ew DBT able test		22767	Teleph	one Number				
		ecycling MoveandSleep	1	22767	<u> i cicpi</u>	IONE NUMBER				
		edycling Space i ei	1 2	22767		UN I	La	ncei		
		blas OutorHours	i 2	22767						
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	- 1	MS MaccaneY	2	2276755	VOUCHER_10	CRM File Import	n/a	0	none	
	Reigi	Ho MessageA	8 2	2276754	VOUCHER_1	CRM File Import	n/a	0	none	
	Bull									
	l Cam	olia test								
lä 💑	case	6544								
	DAE	Inhound Applications								•
Middl	e of th	e Queue. Hit page down for	more reco	rds	31 Queue Items.					11.

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

Synthesys - Outbound M	tanager							×
0	êt <u>X</u> ↓							
All Accounts	▲ ID	Customer ID	Outbound List	Retry Time	Times C	Agent ID	Agent Name	TT
🗄 🕼 AJN Test Centre	8 2227	. VOUCHER_14	CRM File Import	n/a	0	none		1
🖽 😰 Allianz	-							
Arvato BCA								
Brentford Dry Docks								
🐵 🚯 Brigitte Telebusiness	Queue S	Search Filter	×					
🗉 💕 Brigitte Test 2010								
😑 🚯 Brigitte Test2011	Param	etel:						
CRM and Controls	Trusto	merito						
CRM ImportTest	Value:							
CRM DBImp	Vouch	net_14						
CRM File Import	-							
CRM Notes		OK Ca	ncel					
CRM Notes2								
CRM Test	0000							
CRMTest April								
CRMTest March11								
DB ServiceTest	0.001							
> Delete CRMPrefix	00001							
DeleteCampaign	10001							
Edit SQI	00001							
LiftRepair Survey	00001							
New DBTable test	00001							
 Recycling MoveandSleep 	00001							
Redycling Space Let								
Rotas OutofHours	0001							
Runner test	10001							
🗉 🧠 SQI test								
Trans Table	00001							
Delethano								
Bingitteos	00001							
Camplia tart								
Concepted								
OAE Inhound Applications								
liddle of the Oueue. Hit page down f	for more records	1 Queue Items.						

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.

Ç _® O	utbou	ind - Outbound Manager							
File	Edit	View Help							
Ľ		Queue calls using Selective Que	euing Impo	ort					
e		Queue calls using Selective Que	eue calls using Selective Queuing File Import			iotestLM			
Ē		Remove Queue calls using Sele	ctive Queu	e M	onitor		Kaaka		
÷-6		Delete SQI Prefixes	Edit Brea	k R	easons		100	and then	×
		Delete SQM Prefixes							
		Process DoNotCallList for entir	C	de	Break Reason	Phone State	E	Enabled	
		Bulk Change Queue							Edit
i i i		Edit Default Recycling Rules							
		Web Queueing							Add New
		Edit Break Reasons							
	Bull	nteouyzo12							
i 🗄 🖥	Can	nelia test							
E-6	case	e6544							
	DAF	F Inbound Applications	v	Brea	ak Reasons Enabled	1			
	DAP	onv						ОК	Cancel
÷.	daz	za							
	Den	nonstrationandTrainingScripts		mn	nanuei		Palading	1	

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).

dit Break Re	easons			l	Σ
Code	Break Reason	Phone State	Enabled		
dd New Br	reak Reason	(device)	(Normalities)	×	
Break Re	eason Code: 1		Phone State: Phone State:	Break	
Br	eak Reason: Tea			Add New Edit	
	Enabled: 🔽		Ok	Cancel	
			ОК	Canc	el

• 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.

lit Break Re	easons	÷		x (
Code 1 1	Break Reas Tea Coffee	on Phone State Break Break	Enabled Enabled Enabled	Edit	
3 4 5 6	Swimming Lunch Gym Meeting	Edit Break Reason	ode: 6	Phone State: Phone State: Bre	zak 🗨
✓ Brea	ak Reasons Er	Break Rea	ason: Meeting		Add New Edit
		Enab	led: 🔽	ОК	Cancel

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.

	Default Live Monitor					~
	Webflow launcher	x	🛞 Parked calls			
	Select a webflow to launch:	Refresh List	Select to unpark:			Page size: 5 🗸
	□-@General		Webflow			
			Training3 Test2 - OBtestTRN3 3.0	test	08/07/2011 14:42:24	Brigitte Reimer (brigitte)
	G		Brigitte - WebControls 14.0	testing the park		Mark Melody (mmelody)
			Jaros - nulDateTime 2.0	null?	17/05/2012 10:50:39	Jaros Wegner (jaros)
	Hianz Commercial		BR DecJan - BRCityBreak 5.0	yrudr		Happy Administrator (Admin)
				tes		Brigitte Reimer (brigitte)
	Renewals 4 Week Contact C	teason			14 4 1 0	f3 🕨 🕅 🕅 G
	Allianz New World Web	~				
	OK OK					Page size: 10 🔨
	Bob WF1		00.0	Hold reaso	n Hold	
	BR Declan		11.0	upresti test	23/08	/2013 16:52:33
			Refresh		M 🖣 1 a	€1 🕨 🕅 🚺 G
	- Contact					
	- Jogout test					
ice teelless						
BI.						



THE QUEUE MANIPULATION WIZARD

Queue Manipulation Wizard - S	tep 3	×
SYN	THESYS ieue manipulatio	n
Please select an option to filter		
Calls in State		
C Calls matching Filte	r	
C All calls in Queue	📽 Condition Criteria	OK Cancel Help
	After27/02/08 Cailed x3	Unobtainable
	I I I I I I I I I I I I I I I I I I I	



THE QUEUE MANIPULATION WIZARD

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Change State	173
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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 😂 All Accounts

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 🎰 Ties OB

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.

Queue Manipulation Wizard - :	Step 1	×
S	Welcome to Queue Manipulation Wizard	
	< Back Next> Cancel Help	

- 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.

Queue Manipul	lation Wizard - Step 2 🔀	:
€	SYNTHESYS <i>Queue manipulation</i>	
	Please select a prefix.	
	< <u>B</u> ack <u>N</u> ext > Cancel Help	

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.

Queue Manipulation Wizard - Step 3
SYNTHESYS Queue manipulation
Please select an option to filter
Calls in State
C Calls matching Filter
C All calls in Queue
< <u>B</u> ack <u>N</u> ext > Cancel Help



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.

Queue Ma	anipulation Wizard - Step 3
	SYNTHESYS Queue manipulation
Please	e select an option to filter
	C Calls in State
	C Calls matching Filter
	C All calls in Queue
	<back next=""> Cancel Help</back>

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.

Queue Manipulation Wizard - Step 4				
😤 SYNTHESYS				
Queue manipulation				
Show items with status				
🕅 🗆 Done 🐞 🗆 Unobtainable ?? 🗆 Wrong Number				
📱 🗖 Queued 🛛 🖗 🗖 Never Call 🔯 🗖 Recycling Complete				
🕓 🗆 Scheduled 😔 🗆 Sleeping 🛕 🗖 Attention				
Moved				
Select all Clear all				
< Back Next > Cancel Help				

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.

Queue manipulation	Queue manipulation
Asign to agent Change Hosty Change Hosty Change Hosty Change Ride De-ssign agent Delete	Agent to choose
Deiste	agentiet

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.

 Synthesys Queue Manipulation W	/izard
You choose to do the following action: C Do now C Schedule later in Campaign Manager	
GSC Prefic GSCS_4 All Outbound Campaigns Sort Of Filter:Calls In State Filter Options: Attention,Sleeping Action to do: Assign to agent	- ⊳

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).

Convert Manipulation Wixard - Step 6	Queue Manipulation Wilard - Step 7
What do you want to do with these calls Assign to agent • Assign to agent • Output Involv • Output Involv • Descript Revelv • Descript Revelv • Descript Revelv •	Choose new calls Priority
GackCancelHelp	< gack Net Cancel Help

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.

ueue Manipulation Wizard	- Step 8	(a
844 **	Synthesys Queue Manipulation V	Vizard
	You choose to do the following action: C Do now C Schedule later in Campaign Managet	
	GSC Pretix: GSCS_4 All Outbound Campaigns Sort Of Filter Calls in State Filter Options: Attention,Sleeping Action bit dx: Assim to avend	- ₽

- 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*.

Queue Manipulation Wizard - Step 6	x
SYNTHESYS Queue manipulation	
What do you want to do with these calls Change state Assign to agent Change Priorty Change Priorty Change State De-assign agent Delete	
< <u>R</u> ack <u>N</u> ext > Cancel He	Þ

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**.

Queue Manipulation Wizard - Step 7	Queue Manipulation Wizard - Step 8
SYNTHESYS Queue manipulation	Synthesys Queue Manipulation Wizard
Choose new cells state Queued Done NeverCel Scheduled Scheduled Unobtandel Wrongitumber	You choose to do the following action:
< <u>Back</u> Next> Cancel Help	< Back Finish Cancel Help

- 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*.

S	YN	TH ueue n	ESY nanipul	' S lation	
What do you wa De-assign Assign to a Change fin Change sta Be-assign Delete	nt to do with sgent gent ority te sgent	these calls		y	
		< <u>B</u> ack	Next >	Cancel	Help

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.

84) +*	Synthesys Queue Manipulation Wizard
	You choose to do the following action: C Do now C Schedule later in Campaign Manager
	GSC Prefix: GSCS_4 All Outbound Campaigns Soft OF Filter Calls in State Filter Options: Attention, Sleeping Action to do: De-assign agent

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*.

Queue M	anipulation Wizard - Step 3 🔀
	SYNTHESYS Queue manipulation
Pleas	se select an option to filter Calls in State Calls matching Filter.
	C All calls in Queue
	< <u>B</u> ack <u>N</u> ext > Cancel Help

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.

Queue Manipulation Wizard - Step 4	×
Select an Outbound List to monitor	
< Back Next > Cancel	Help

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.

Queue Manipulation Wizard - Step 5	x
SYNTHESYS Queue manipulation	
For 'Calls matching filter' select a condition	
Click here to set your condition	
<u>≺ 8</u> ack <u>N</u> ext> Cancel Help	

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

Create Condition Duplicate Condition	is onView Condition Summary
III Condition Criteria ★	OK Cancel Help
New condition	
Please select an input field that the	e condition relates to:
<pre><agentassigned> </agentassigned></pre> <retrytime> <stateofcall> </stateofcall></retrytime>	<u> </u>
Customer ID FirstName Home	
Line1 Line2 Line3	Help
Line4	

Ø

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 ² 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.

Edit condition	New condition
' <retrytime>'</retrytime>	' <retrytime>' after</retrytime>
Please select an operator from the list below.	Please define date value to be compared with the field Use Calculations 2008-02-27 19:00 CTodeyo Y plus Y 0 days
KAN Series Cancel Help	Finish Cancel Help

- 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.

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.

Queue Manipulation Wizard - Step 6	To filter out and move selected queue states only, use the <state call="" of=""> option when creating your condition.</state>
What do you want to do with these calls Change Priority Change State De-assign agent Delete Move to outbound List.	The next page of the wizard will prompt users to select the destination Outbound List.
<back next=""> Cancel Help</back>	Queue Manipulation Wizard - Step 7
	Select an Outbound Lat to monitor

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.

 Synthesys Queue Manipulation Wizard	
You choose to do the following action: C Do now Schedule later in Campaign Manager	
GSC Pretix: GSCS_6 Outbound Campaign - TiesDB Sort OI Filter:Calls Matching Filter Action to do: Move to outbound campaign Outbound campaign: Brighte September06/Ties/After.	6

Click Finish to process the action.

< Back

Next >

Cancel

Help

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

Queue Manipulation Wizard - Step 3
SYNTHESYS Queue manipulation
Please select an option to filter
Calls in State
C Calls matching Filter
<back next=""> Cancel Help</back>

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.

Queue Manipulation Wizard - Step	5
SYNT	HESYS ue manipulation
What do you want to do with these Change Priority Change State De-assign agent Delete	cals
	Back Next > Cancel Help

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.

		SYS	
	lueue mai	IIpulation	
Choose new calls state		-	
Done NeverCall Queued Scheduled			
Sleeping Unobtainable WrongNumber	13	•	

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.

Queue Manipulation Wizard - Step 7	Queue Manipulation Wizard - Step 7
Specily sleep period Days 🗑 🚓 Hours 🛛 🚓 Minutes 10 🛬	Schedule calls Select a time to schedule the call for 12 June 2008 1226.02 1 Select the latest time the call can be made
KS < Back Next> Cancel Help	< <u>Rack. Nest></u> Cancel Help

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

Queue Manipulation Wizan	d - Step 8	
84) +*	Synthesys Queue Manipulation Wizard	
22	You choose to do the following action:	Either r
	☞ Schedule later in Campaign Manager BSC Prefix: BSCS_8 Dutbound Campaign - Ties08 Sort 0F FilterAl Cals In Queue Action to do: Change state New state: Scheduled	or crea Synthe in the s Change
	<back cancel="" finish="" help<="" td=""><td>-</td></back>	-

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.

🔀 Campaign Manager		-OX
<u>File ⊻iew H</u> elp		
₽ ∞ ⊗ ₩ 9 ?		
Al Accounts ▲ A AN AN Test Centre → → àòà ggik. → → auz auau ● ⊕ B35 Brigite Jan05 ● ⊕ B37 Brigite Jan05 ● ⊕ B36 Brigite Jan05 ● ⊕ B37 Brigite Jan05 ● ⊕ B38 Brigite Jan05 ● ⊕ B00 BrigiteJune05 ● ⊕ B00 BrigiteOctot5 ● ⊕ B10 Brigite ● ⊕ B10 Brigite September06 ● ⊕ B10 Brigite September06 ● ⊕ B10 Brigite Schedule ● ⊕ B10 Brigite Cabandritm ● ⊕ B10 Brigite Schedule ● ⊕ B10 Brigite Cabandritm ●	Report Properties nott Name BulkQueue Schedule ID 337 Comment Ties OB Bulk Queue Change Towner Ties OB Bulk Queue Change Browse Reports port Tool GSCScheduler Servix Format Image Printer/Export File Name (e.g. %d%m%y for dated filenames) BROuseueChange Dutput Service	
GAM Camelia test GAM Camelia test GAM Camelia test GAM Camelia test	L3	
Ready	NUT	1 //.

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.

🔀 Campaign Manager						_1	
<u>E</u> ile <u>V</u> iew <u>H</u> elp							
💾 🖘 🛞 🔀 😉 🥐							
All Accounts All Accounts Black and Black Anvato BcA Black Brighte Dano Black Brighte October 2007 BRI Brighte BRI Brighte BRI Brighte BRI Brighte October 2007 BRI Brighte October 2007 BRI Brighte October 2007 BRI Brighte October 2007 BRI Brighte DanApp queue change Add Schedule Report Runs Black Brighte State Black Brighte Danapp queue change Add Schedule Brighte HTML Email Black Test Layout no html Black Test Layout no html Black Brighte State O 2 Loan Survey OB D 3 Ties D 3 Ties	Sch Frequency Next Run Date Parameter1 Parameter2 Schedule detail Start Date End Date Show rep	edule information fo specific days of 1 Tuesday, 24 Jun 17:39 Tuesday, 24/06/2008 run indefinitely ort runs	Schedule ID 1 he week 2008 Start Time End Time Modify	557]		
Ready							- /

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.



SYNTHESYS QUEUE MONITOR

Queue Monitor Condition Wizard - Step 3					
SYNTHESYS Queue monitor					
Please select a Data Source from the list below from which the customer table is to be monitored Phoenix Statement				[[
🍾 🔉 🔗 🕱 🗉	OK		Cancel	Help	
Postcode Please select an input field	that the con	dition r	elates to:]	
Sale			X		
	Finish	С	ancel	Help	
					-



SYNTHESYS QUEUE MONITOR

NTRODUCTION	185
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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.

Queue Monitor Condition Wiz	ard - Step 1	×
	Welcome to Queue Monitor Condition Wizard	
	Kara Kara Kara Kara Kara Kara Kara Kara	lp

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



Synthesys Queue Monitor ("SQM")

Part 1: Data Source & Table Columns

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

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

Queue Monito	or Condition Wiz	ard - Step 2			×
	SYN Qu	I TH eue mo	ESY onitor	Ś	
	Please select S	QM prefix.			
	New	BRemove			
	C Existing	,jfhk,f yy		T	
		< <u>B</u> ack	<u>N</u> ext>	Cancel	Help

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.

Queue Monil	tor Condition Wizard - Step 3	×
	SYNTHESYS Queue monitor	
	Please select a Data Source from the list below from which the customer table is to be monitored	
	Phoenix Phoneix Phoneix Replication_RM_Phoenix Target TRN	
	K	



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.

Queue Monit	or Condition Wizard - Step 4	×
	SYNTHESYS Queue monitor	
	Please select a table or view from the following list	
	Customer ID Title FirstName	
	Surname ✓ Back Next > Cancel Help	

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

Queue Moni	tor Condition Wizard - Step 5 🛛 💌
	SYNTHESYS Queue monitor
	Please select a column that has the Customer ID.
	Customer ID
	Customer ID FirstName Home Number Line1 Line2 Line3 Line4
	<back next=""> Cancel Help</back>



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.

QUE	you to define	onit	Ition for th	ne monitor.	
is step allows	you to define	your cond	lition for th	ie monitor.	
is step allows	you to define	your cond	dition for th	ie monitor.	
с	lick here to se	et your cor	ndition		
	(Pack	(No		Canaal	l Hala
		Click here to se	Click here to set your con	Click here to set your condition	Click here to set your condition

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

				-			
E Selection	Criteria Defi	nition		<u></u>			
* 💿 🔗	× -				ок	Cancel	Help
Ne	ew condition						×
		Diana calent	an inan di Galal k			. here:	
		Flease select	an input lielu t	nat the co	nullion relates	. 10.	
		PostCode				-	
	<<		>	Finish	Cancel	Help	
1							

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

New condition	Edit condition
'PostCode'	'PostCode' containing
Please select an operator from the list below.	Please define text strings to be compared with the field
not between Like not null in null ending in not null ending in not null ending in	SW
not ending in	
Cancel Help	Finish Cancel Help

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.



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.

Queue Monitor Condition W	fizard - Step 8	×
8	Synthesys Queue Monitor Condition Wizard	
8	Do you wish to: Remove from queue now Schedule later in Campaign Manager	
	<u> </u>	

- 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:

🖄 Campaign Manager		
Eile ⊻iew <u>H</u> elp		
💾 👓 🚳 🗮 🕓 🕐		
A A Accounts AN A/N Test Centre AN A/N Test Centre BCA Arvato BCA BCA Arvato BCA BCA BCA BCA Control BCA BCA BCA Control BCA BCA BCA Control BCA BCA Control BCA BCA Control BCA BCA Control BCA	Report Properties Report Name SQM Remove Comment ID 306 Comment Full Name Remove if Postcode SW Created Date 28/02/2006 Browse Reports Report Tool SQM Service Format Printer/Export File Name (e.g. %d?m2y/tor doled filenames) Output Service Output Tool Parameter1	lr F b N S M B

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.

🔀 Campaign Manager		
Eile <u>V</u> iew <u>H</u> elp		
💾 🗢 🕲 🔁 😉 🅐		
All Accounts Image: Control All Accounts Image: Control All Accounts Image: Control Black Arvato BCA Image: Control Black Brights Jan05 Image: Control Black Brights Jan05 Image: Control Image: Control Ima	Schedule information for Schedule ID 412 Frequency specific days of the week ext Run Date Tuesday, 28 Feb 2006 axt Run Time 17:12 Parameter1	
Ready		

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.

Edit
Queue calls using Selective Queuing Import
Queue calls using Selective Queuing File Import
Remove Queue calls using Selective Queue Monitor
Delete SQI Prefixes
Delete SQM Prefixes

From a dialog listing either all SQI or SQM prefixes, users can select one or more prefixes for deletion.

Delete SQI Prefixes	×
Choose SQI Prefixes	
JGTest	_
joe2	
Joemon	
Joesqi	
joetes	
Jose1111	
JoseSQII	
just crm02	
KAISER	
LOAN	
pho pho	
petcome	
new	
New3	-1
J	
Delete Prefixes	Close

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

- · · ·	
File View Help	
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All Accounts All Accounts BTR Brighte Training To City Breat BR City BR City BR City Create New Export Create New HTML Email Show Schedules DIS Demonstra Show Schedules Show Schedules Show Schedules Show Schedules Show Schedules Show Schedules Show Schedules Show Schedules Show Schedules Show Report Runs Assign telephone number for this campaign Report Wizard Add New Report Report Dis	Campaign Details City Breaks 25/02/2008 End Date 01/01/2525 8 Campaign Prefix 01 30 8.1 PIN Scripts/BTR/01 None IIAborted Call information in DB
	Save Delete



REPORTS

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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:

🖄 Campaign Manager		
File View Help		
💾 🗠 🚳 🗮 😉 🔞		
Account A	Account Details Account Name Demonitrationand famings cipts Pielic [DTS] Addexit Futer Scharge, E. Details Pielic [DTS] Postcode SEI 117 Account Manager Main Contact: Figline Renee Telephone Other Contact: Telephone Figline Renee Veb Site Invariant Telephone Veb Site Invariant Telephone Swee Delate Invacie ID.	
Ready		

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.

险 Campaign Manager	
Eile View Help	
💾 🗢 🚳 🗮 😉 🕐	
Al Accounts Accounts Accounts Accounts Accounts DAR Dearoll DAR Dearoll Dar Daroll Daronstrationand TrainingScripts D Of Learnappletation Of Learnappletation Of Antivitying Set Set Set Set Set Set Set Set Set	Campaign Dateils Campaign Name Product Dider Start Date 13/06/2003 End Date 01/01/2525 Campaign 1D Campaign Perfix 04 Inactive Period (days) 30 Script Version 11.0 PIN Script Paot Directory Script Not Directory Brighte Record full Aborted Call information in DB Record full Aborted Call information in DB Delete
Ready	

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.

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

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.

😂 Campaign Manager		
File View Help		
1 - 8 5 9 0		
A Accounts A Accounts A Accounts A Constant Service Lamples B Service Lamples Constant Service Data Constant Service Data Constant Service C	Account Netalis Account Netalis Addess: Subre 57 Subre 587 Petitode State 57 Man Contact: BigHte Renee Telephone Diffe Center: Face Man Contact: BigHte Renee Telephone Diffe Center: Face Main Contact: BigHte Renee Telephone Diffe Center: Face Diffe Center: Detection:	



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:

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

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

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 Delete button to display a window listing the various options for deleting campaigns:

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

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.

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



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.

📐 Campaign Manager	
<u>File V</u> iew <u>H</u> elp	
💾 🗢 🚳 🗒 🕓 🥐	
All Accounts	
🕀 🎇 ALL Allianz	Report Properties
EX BEX Brigitte Example	Report Name BR Scheduled SQI ID 2
E BIR Brigitte Training	
Provide the set of the	Comment
	Full Name SQI
	Created Date 31/03/2009 Browse Reports
Schedule No 2	
02 Sales Survey	Report Tool SUI Service
03 Express Loan	Printer/Export File Name (e.g. %d%m%y for dated filenames)
🗄 🎇 cgs garethgs	BRTST2
🕀 🤐 cob Karen	- Output Service
CRM NoeticaTesting	
E SCT Empanuel	Uutput I ool <none></none>
	Parameter1
	Parameter?
🕀 🎒 GGS carotel outbound	
🗄 🚰 joe joetest	
🕀 🙀 jop joetestp	Save Delete Edit Report
🗄 🖼 MIC Microsoft	
E MON MONDIAL	
🕀 🤐 MRK MarkW	
NOE Noetica	
Ready	

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 Format	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). The output format of the report, available for the selected tool.
Printer/Export Name	Name of a valid printer (You can check printer names used by other reports) or Export file name - this is only used by download type reports, i.e. reports that need to be saved as data text files. If this is to be used, a filename such as <u>\\c\folder\%d%m%y.txt</u> can be used to create different filenames on different days. This will produce a file called <u>\\c\folder\210599.txt</u> for example. To send a fax, you need to enter the name of a TIF printer . Reports are then saved as an image and faxed as bit maps.
Output Tool	Select an Output Tool e.g. Fax Service if the report is to be faxed or Email Service to send it as an email. The output format from the Report Tool must be compatible with the format used by the Output Tool. If no Output Tool is required, leave this field as <none>.</none>
Parameter1 & 2	Parameters for the Output Tool. To send Emails , enter the senders email address (from Address) into the Parameter1 field. With Microsoft Exchange 2005, the 'from' email address in Campaign Manager needs to be entered with an alias name: Kim Constantine< <u>Kim.Constantine@noetica.com</u> >. 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.





Setting a Frequency for Report runs

To run at × **SYNTHESYS** Schedule Wizard When would you like this report to run? Timed Event driven -C Every minute(s) C Every time a call is taken ÷ hour(s) C Every 1 C Call Tracker 'Print' button day(s) C Every 1 ÷ C From a 'Call Tracker' action On specific days of the week C Monthly C Run once only To run first at 16:45 + < <u>B</u>ack <u>N</u>ext > Finish Cancel

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.

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

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.

Plea	ase select the days of the	week when the report is to run
	Monday	🔽 Fridav
	Tuesday	Saturday
	🔽 Wednesday	🗖 Sunday
	🗖 Thursday	

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?

ecify Monthly Pe	riod	
8 9	SYNTHESYS Schedule Wizard	
	Please select when you want the report to run	
	Day 1 of the month the last day of the month	
	C the first ▼ Monday ▼ of the month Monday Tuesday Wednesday Thursday ▼	
	< <u>B</u> ack <u>N</u> ext > Finish Cancel	



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.

YS dule Wizard e to pass to the report?
e to pass to the report?
<u>_</u>
<u> </u>
_
ne list or type
Einish Cancel

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.

Schedule Summary		×
S `	Y N T H E S Y S Schedule Wizard	
You have now sol information below reports.	neduled BR Scheduled SQI report to run. Please check that the is correct, particularly the next run date and time fields for timed	
Frequency	monthly	
Next Run Date	Thursday, 01 Oct 2009	
Next Run Time	16:45	
Parameter 1	<yesterday></yesterday>	
Parameter 2		
Schedule detail	Day 1 of the month	
	< <u>B</u> ack <u>N</u> ext> Finish Cancel	

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.

🔀 Campaign Manager	
<u>Eile View H</u> elp	
~> ⊗ 🛃 🕓 🧿	
Image: All Accounts Image: All Accounts Image: All Accounts Image: All Accounts <th>chedule information for Schedule ID 16 Monthly Thursday, 01 Oct 2009 16:45 CYesterday> 2 Day 1 of the month</th>	chedule information for Schedule ID 16 Monthly Thursday, 01 Oct 2009 16:45 CYesterday> 2 Day 1 of the month
Criteria Construction and TrainingScrip Start Date Given Strate EGT Emmanuel End Date	e 14/09/2009 Start Time 16:45 Prun indefinitely End Time 00:00
ELM Emily ELM Emily GET emmanuelt GS carotel outbound for joe joetest Mic Microsoft Mic Microsoft Mic Microsoft Mic MarkW Mic MarkW Mic MarkW	report runs Modify Delete
Ready	

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

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

Report Run Filter					
Please tick the appropriate boxes to filter your results, or press OK to view the latest report runs					
🔽 Status	Status Name Crystal Service - Unknown format				
	C Status Statu Cupstal Service - Unknown format Cupstal Service - Invalid Report Run Cupstal Service - Timed Out Cupstal Service - Failed to Stati Cips Cupstal Service - Invalid number of p				
🔽 Account / C	ampaign				
	C Account Name Brigitte Training (BTR)				
	Campaign Name BR OBWizard (ID:65)				
🔽 Run Dates	C Before 11 September 2009 ▼ and C Between 14 September 2009 ▼				
	OK Cancel				

Report Run Maintenance

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

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

Edit this report run. The *Edit Report Run* dialog (next page) is displayed, allowing 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' ⁽¹⁾ icon. A list of schedule details will be displayed, including dates and times of next-runs.

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

Parameters

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

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



Report Services Parameters and Formats

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

<Yesterday>

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

<Today>

The same as above except with today's date.

<Report_Run_ID>

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

<Sequence_ID>

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

<Table.Column:TableName.ColumnName>

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

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

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

For example in Campaign Manager under Parameter2

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

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



% characters

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

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

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.

eport Name	ReportName2	1	D 307	
Comment	Any relevant comments			
Full Name	\\Reddevil\Synthesys\R	eports\BrigitteJune	05\reportfile	
reated Date	02/03/2006			Browse Reports
Report Tool	Crystal Service 💌	Format CS	v 👻]
	 Neddevil\Synthesys\Ri 	e.g. %u%m%y101u eports\BrigitteJune	05\outputfile.csv	/ /BODY
Output Sei	vice			
Output Tool	Email Service			
Parameter1	From Email Address			
Decemeter?	To Email Address			



<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 Printer/Export File Name Output Service Parameter1 Output Service Parameter2 Parameter1 Parameter1 (Report Properties) (Report Properties) (Report Properties) (Report Properties) (Schedule Properties) (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: Report Run Entry:

<Sequence_ID> <NODUP:30> 7f3dad78-1610-4d82-a2bf-dd1ba5718844



Report Properties				
Report Name	Report Name ID 253			
Comment	Any relevant comments			
Full Name	\\Reddevil\Synthesys\Reports\TestReport.rpt			
Created Date	e 01/03/2006 (Browse Reports)			
Report Tool	Crystal Service Format Text			
	Printer/Export File Name (e.g. %d%m%y for dated filenames) \\Reddevil\Synthesys\Reports\TestReport.txt			
Cutput Service				
Output Tool	Email Service			
Parameter1 From Email Address				
Parameter2 <table.column:tablename.columnname> <n0dup:30></n0dup:30></table.column:tablename.columnname>				
S	Save Delete Edit Report			

Notes:

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

<Attach:filename>

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

Printer/Export filename when setting up a report:

<Attach:d:\Myfile.txt>

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

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

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

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

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


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

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

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

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

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

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

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

Edit Report R	un					
Report Name	New Report Run ID 261660					
Status	Crystal Service - Finished					
Run Date	02/03/06 Run Time 11:14					
Schedule No.	408 Sequence ID					
Report Location	\\reddevil\d\Synthesys\Reports\Brigitte\Test.rpt					
Report Tool	Crystal Service Format HTML					
Report Parameter	ynthesys\Reports\Brigitte\Test.html <attach:d:\myfile.txt></attach:d:\myfile.txt>					
Schedule Par	ameter1					
Schedule Par	ameter2					
Output Tool						
Parameter1	anyone@noetica.com					
Parameter2	2 brigitte@noetica.com					
Save and Close Cancel						



<ADDTOP:filename>, <ADDBOTTOM:filename>

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

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

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

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

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

Automatic output file naming

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

For example, if this was not done the following could arise: a report is set up to export to a file called myfile.xls, which is emailed every 30 minutes. If the 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@DomainNameExample:Julie.Smith@context.co.uk

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

Emailing with an Alias:

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

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

Note:

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

	Report Properties				
Report Name	ReportName ID 307				
Comment	Any relevant comments				
Full Name	\\Reddevil\d\Synthesys\Reports\Report3.rpt				
Created Date	02/03/2006 Browse Reports				
Report Tool	Crystal Service Format HTML				
	Printer/Export File Name (e.g. %d%m%y for dated filenames) \Reddevil\d\Synthesys\Reports\Report3.html /BODY <addtop:d:\myfile.txt></addtop:d:\myfile.txt>				
COutput Ser	vice				
Output Tool	Email Service				
Parameter1	anyone@noetica.com				
Parameter2 Julie Smith <julie.smith@company.co.uk></julie.smith@company.co.uk>					
S	ave Delete Edit Report				

Requirement for Microsoft Exchange 2005

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



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

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Eile <u>Vi</u> ew <u>H</u> elp		
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Al Arcounts Al Arcounts Al Arcounts Al Arcounts Al Arcounts BCA Arvato BCA BCA Arvato BCA BCA Brights Jung Add Schedule Report Runs BB Brights Arvato BCA Add Schedule Report Runs BB Brights Arvato BCA CEM GO GO CEM GO CEM GO CEM GO CEM GO CEM GO GO	Report Properties Report Name Report Name 2 ID 307 Connerk Any relevant comments Full Name Viedden/N Synthesys/Report	

Email Subject

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

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

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

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



Crystal Reports in HTML format

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

e.g. <u>\\server\d\synthesys\reports\aCampaign\MyReport.html</u>

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

Report Formats Summary

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

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

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

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



REPORT TOOLS 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 Exe Service Fax Service Email Service Crystal Service Export Service SQI Service CRM Import Service	Report Tool Report Tool Output Tool Output Tool Report Tool Report Tool Report Tool Report Tool	Run Impromptu Reports Run any executable program Run Fax reports Run Email Reports Run Crystal Reports Run Export Reports Run Selective Queuing Imports Run Scheduled CRM Imports
er an imperi eer nee		



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