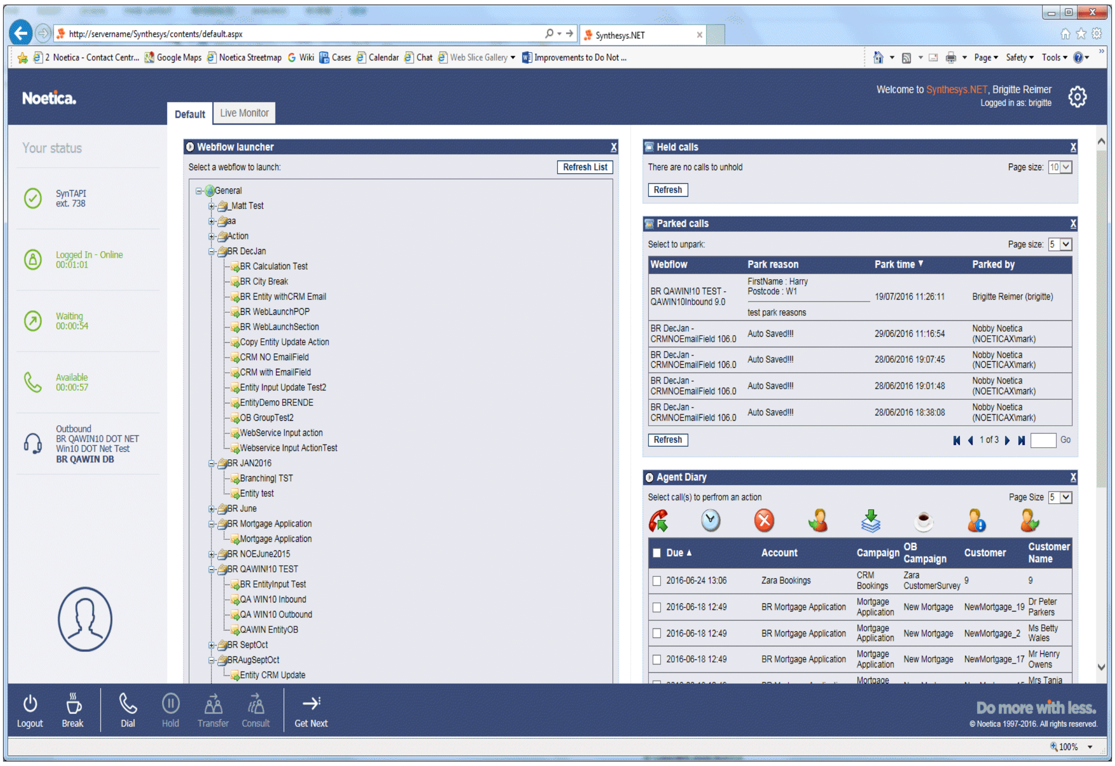
SYNTHESYS.NET



SYNTHESYS.NET

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Notes prepared by Brigitte Reimer

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SYNTHESYS.NET

INTRODUCTION

Websites are increasingly used as a point of contact between an organisation and its customers. Applications of Synthesys 5 are broad and ideal for Websites with any requirement for interaction with customers. This can range from travel sites, to Insurance companies providing quotations and policy renewal online and online e-government forms, such as passport and housing applications.

The Synthesys Management

Synthesys Management is a Silverlight application, hosted on a web page or on the desktop. The interface consists of a launch page with a number of applications, including *Synthesys User Management, Synthesys Teams and Call List.*

If the Synthesys Management application is installed on the local machine, users are also able to launch further applications to allow use of *Customer Relationship Management* and *Outbound* functionality.

The Synthesys Interaction Studio

The Synthesys Interaction Studio allows Web designers, and even non-technical people to create Webflows in just days, using the Synthesys Interaction Studio, a simple graphical user interface.

A Webflow is a map of all the routes an interaction can take, from a simple transaction, to complex interactions that are personalised. The Webflow guides agents and users through the different routes and through the sections of the form that they see on that route. The information gained is readily reusable for business purposes because it is stored in a database.

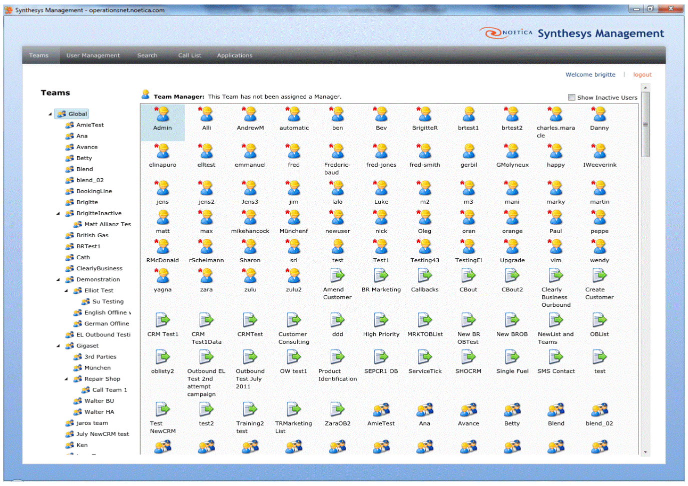
The Synthesys Portal

Synthesys Portal is used to launch CRM websites and to run the associated Webflows.

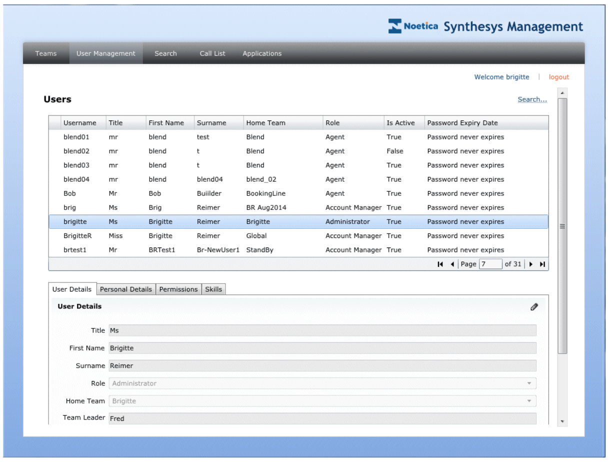
From the moment the Webflow appears, until the call ends, agents are presented with all the information they need to handle the call in a knowledgeable and professional manner.

SYNTHESYS MANAGEMENT

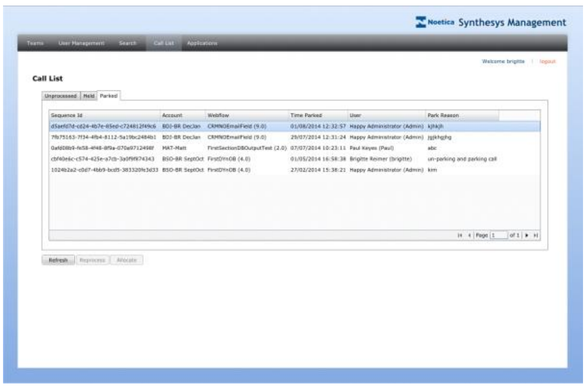
Teams



User Management



Call List *Management*



SYNTHESYS MANAGEMENT

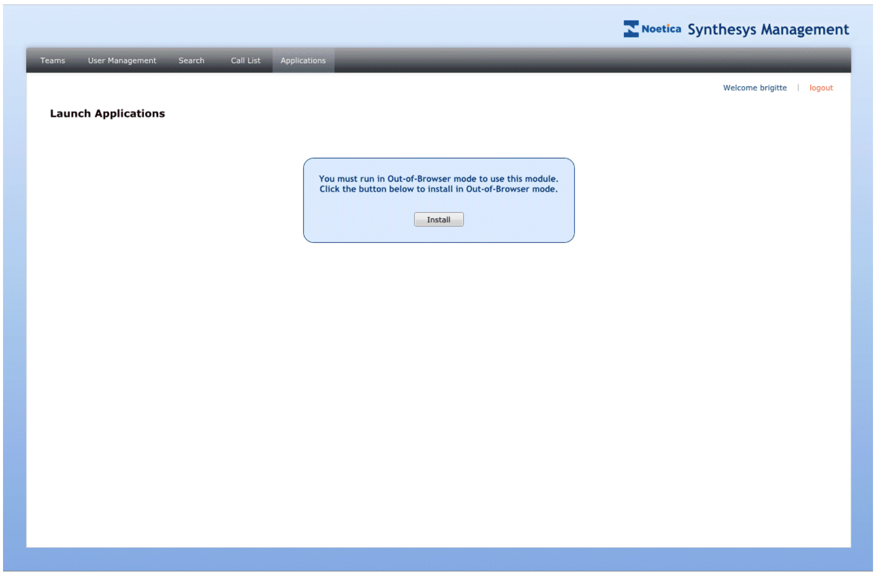
Synthesys Management is a Silverlight application, hosted on a web page or on the desktop.

The interface consists of a launch page with a number of applications, currently including *Synthesys User Management and SynthesysTeams.*

*Users that wish to use the Applications tab to launch CRM and Outbound functionality need to **install** Synthesys Management onto their local machine.*

To install Synthesys Management

- Enter the *URL address* into the *Address* field of the Web Browser
- Log on and select the ***Applications*** tab.
- Click the ***Install*** option to install Synthesys Management to the desktop.



Synthesys Management Features

The access available to users in Synthesys Management depends essentially on the permissions that have been assigned to the individual users.

Users with full administration rights have permissions to set up and maintain user accounts and permissions, manage teams and view and manage call lists.

Option	**Description**
Teams	Are groups that contain users, i.e. team members fulfilling different roles and work objects, for example *Webflows, Cases Inboxes* and *Outbound Call Lists*. If the system is *Active Directory* enabled Synthesys Management users will be able to import Synthesys users directly from the company's Active Directory.
User Management	Depending on the permission rights assigned, allows users to set up and maintain user accounts, adding and editing user details, permissions and passwords. Using *Active Directory*, users will be managed directly through Active Directory, rather than in Synthesys. Please see the section on *Active Directory Integration* for more information.
DDI Maintenance	Adding and maintaining DDI numbers for Inbound webflows Assigning Outbound lists to a webflow and a webflows to an Outbound list.
Search	Enables the advanced user search, based on user skills and attributes.
Call List	The *Call List* option in Synthesys Management enables users to view and manage *Unprocessed, Held* and *Parked* calls.
Applications	Allows users to launch CRM, Outbound Wizard, Outbound, Reports and Live Monitor for the creation and management of customer data and outbound call lists. Users that wish to launch applications, to allow use of Customer Relationship Management and Outbound functionality need to install Synthesys Management on their local machine.

User Login

To access the Synthesys Management application, either to an in-house server or an outside website, users need access to a Web Browser and the relevant URL address.

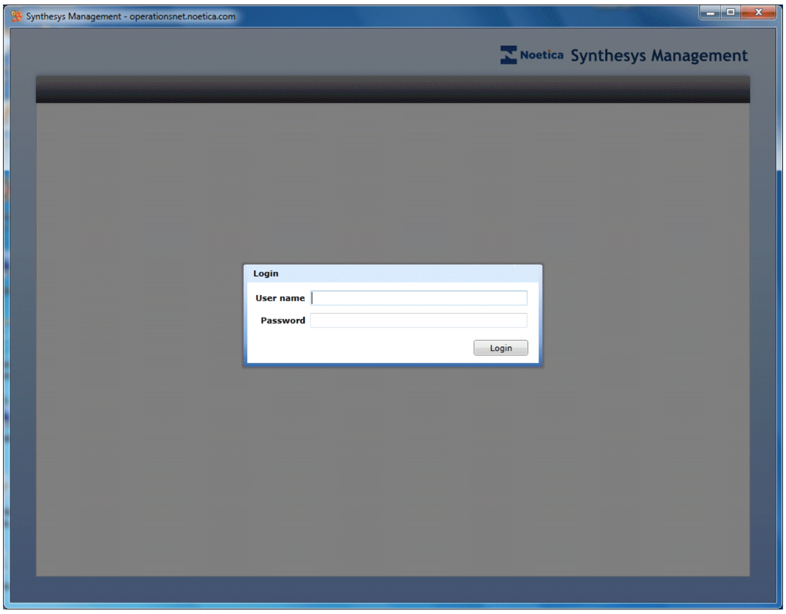
- Enter the URL address into the Address field of the Web Browser.

http://servername/Management/Synthesys.Management.ApplicationTestPage.aspx#/Login

Alternatively, if you wish to launch the *Customer Relationship Management* and *Outbound* applications

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

The next step is to log on to the system.



- Enter your User Name and Password as they have been set up for you.
- Click the Login button.

If you have not received the required URL address or your User Name and Password, please contact your System Administrator. If the secure password option is used, remember to enter at least 10 characters, including a number between 0-9 and one of the special "-_?!%&#%$§" characters.*

*Using **Active Directory** integration, users will be logged on automatically.*

The Synthesys Management main screen will open.

Synthesys Management Main Screen

From the Synthesys Management main screen users can access a range of different modules.

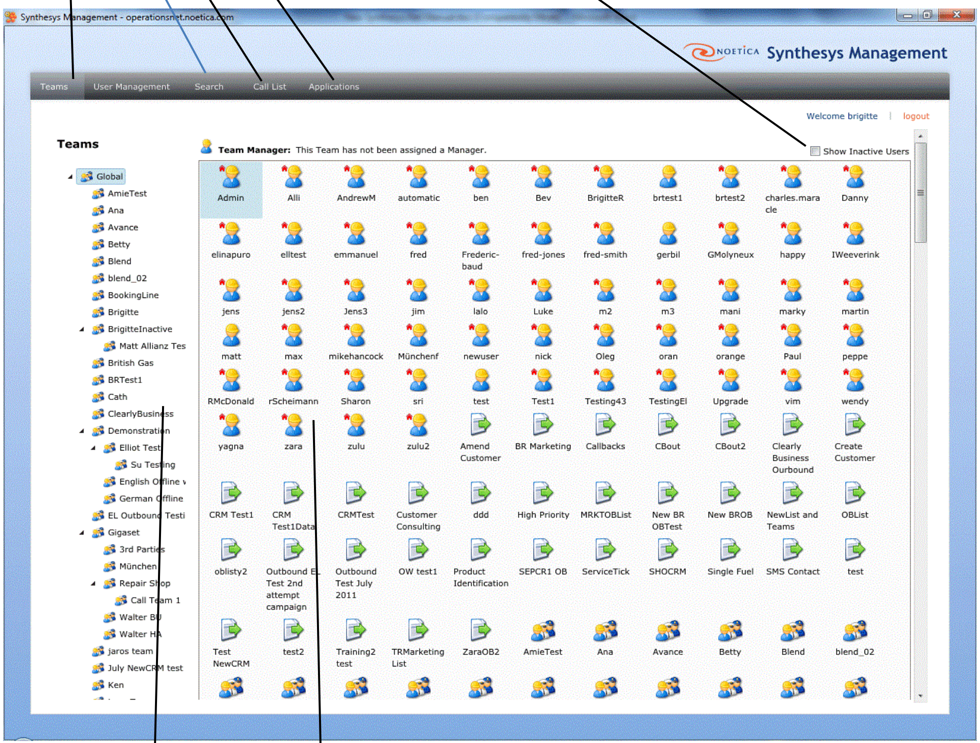
The access permissions available to the individuals logged on reflect their role within the company and the tasks that they will have to carry out.

Teams and **User Management** tabs, to open the *Teams* and *Users* pages

Search tab, enables skills based user search

Call List tab, to view and manage unprocessed, parked and held calls

Applications tab to launch CRM and Outbound modules
Tick box to ***display inactive*** as well as active users



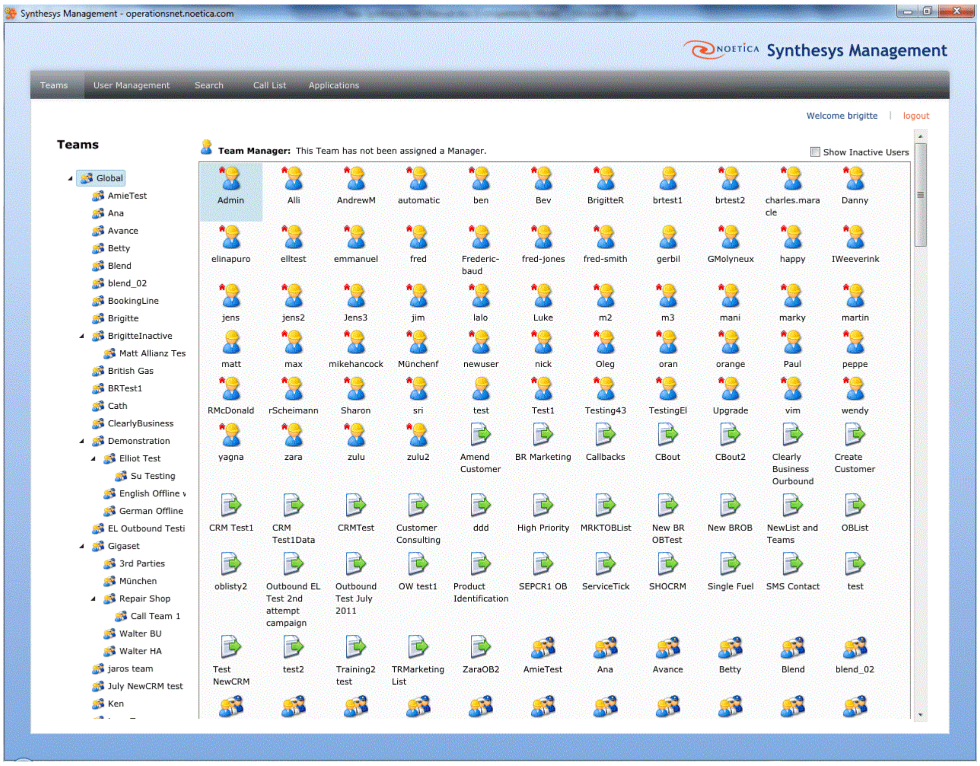
Teams section, showing the *Global team* and any teams that will be created subsequently

Users, campaigns and **teams** that have been set up in Synthesys

Please see the following pages for a description of the *User Management* and subsequently the *Teams* options.

Noetica

Synthesys Team Manager



SYNTHESYS TEAMS

Introduction

Teams are essentially workgroups. Each team will be assigned to a manager who is responsible for the team and contains users, i.e. team members fulfilling different roles and work objects, such as *Webflows, Cases Inboxes* and *Outbound Call Lists*.

- Teams of users.
- Individual users.
- Webflows.
- CRM definitions.
- Outbound Lists.
- Cases Inboxes.
- Further object types.

Users and User Roles

User roles such as agents, team leaders, supervisors, administrators, or additional roles that can be created as required, come with a set of permissions reflecting a person's role within the company and the tasks that they will have to carry out.

Each user has a primary team reflecting their line of reporting, but can also belong to other teams. ***Team managers and supervisors*** in the topmost or higher team also have the permissions associated with that role in teams lower down the hierarchy. Accordingly they can supervise other lower teams, even if they are not in those teams directly.

*Using **Active Directory** integration, new users and roles will be created and managed directly through Active Directory, rather than via Synthesys User Management. Please see the section on Active Directory for more information*

Work Assignment

Work is assigned to individuals by having the relevant work object in their team. So for example:

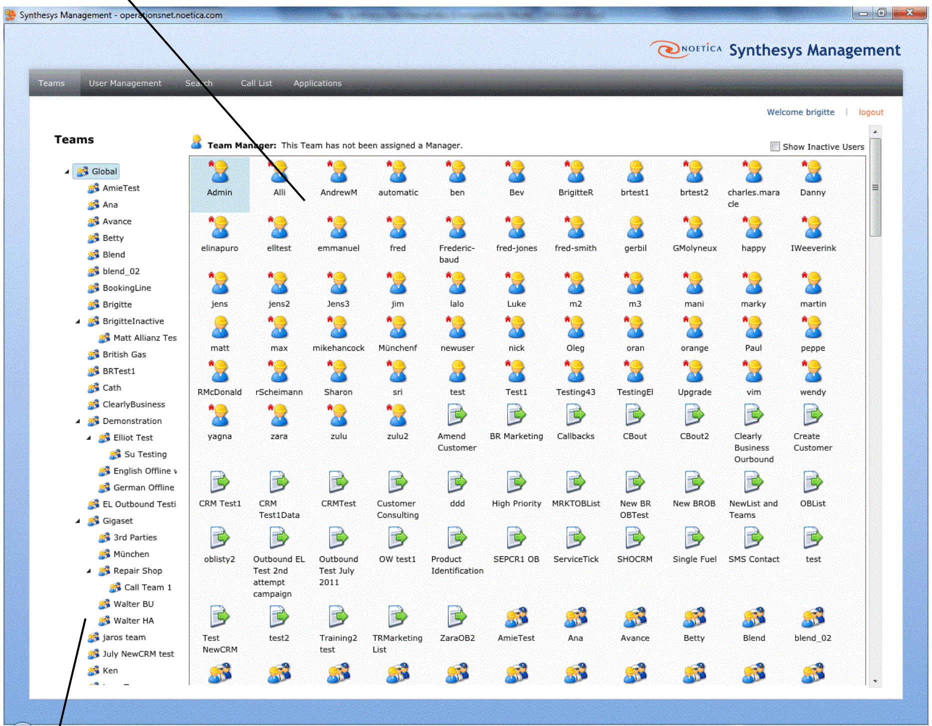
- If a Webflow is in an agent's team, then the agent has permission to work that Webflow.
- If a cases inbox is in an agent's team, then the agent will be assigned cases from that inbox.

STARTING SYNTHESYS TEAMS

Initially, Synthesys Teams will display the ***Global Team***, listing all users registered in Synthesys and all campaigns (Inbound webflows & Outbound call lists) that have been created in Synthesys:

- Click the **Teams** tab at the top of the ***Synthesys Management*** screen.

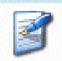
Teams displaying users, webflows, outbound call lists & subsidiary teams for a selected team and the name of the team manager, if assigned



A list showing the *Global team* and any other teams that have been created

 Agent - Primary team

 Agent – Secondary teams

 Inbound webflow

 Outbound list

 Outbound group

 Teams

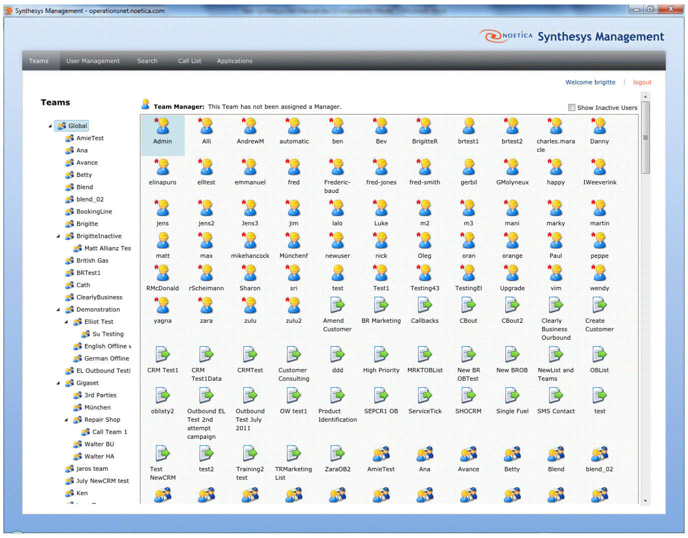
The following section will give information about setting up ***New Teams*** and show how agents and campaigns can be added and removed.

Setting up New Teams

Any number of teams can be set up in the ***Teams*** page, to allow the grouping together of specific agents and work objects, such as webflows and outbound lists.

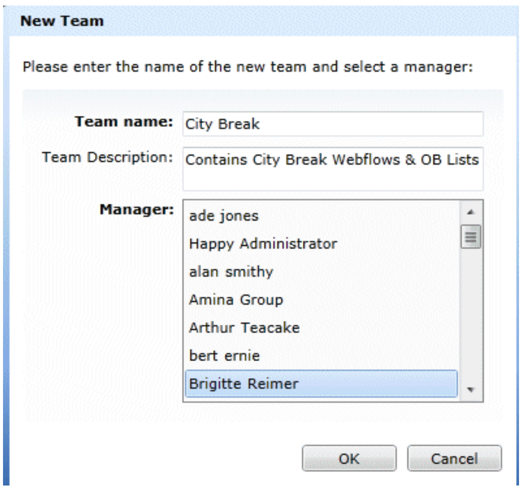
To set up a new team, initially under the *Global* team, and subsequently under any other existing teams:

- Click the **Teams** tab at the top of the ***Synthesys Management*** screen.
- Locate and right click on the team under which you want to set up the new team and select ***New Team*** from the menu.



In the **New Team** dialog:

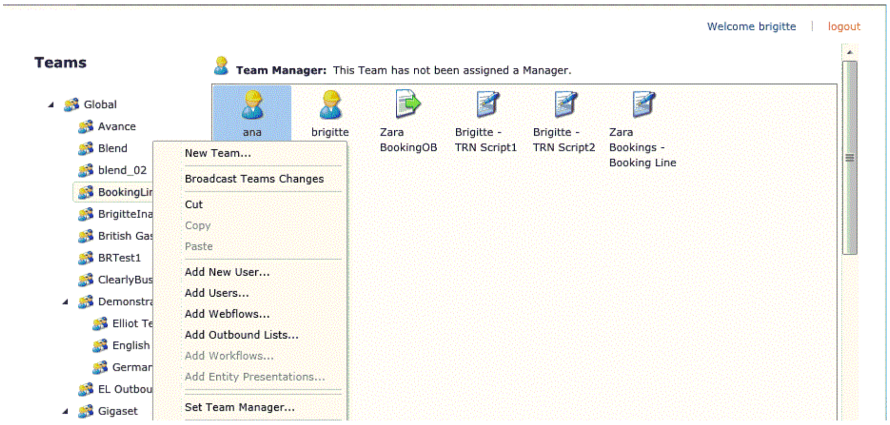
- Type the name for your new team into the ***Team Name*** field.
- Add a caption or brief description into the Team description field.
- Select the person that is to manage the team, from the ***Manager*** list.



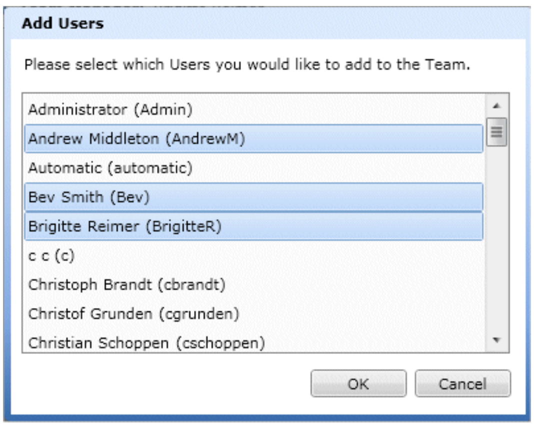
Copying Users to a Team

To copy specific users/ agents to a team:

- Click the **Teams** tab at the top of the ***Synthesys Management*** screen.
- Locate and right click on the relevant team, and select ***Add Users*** from the list.



- In the ***Add Users*** dialog, select the agents to be copied to the selected team.



Holding down the Ctrl key enables you to select multiple names.

- Click ***OK*** to add the agents to the team, or ***Cancel*** to cancel the action, without saving the changes.

Users that have been copied will remain in their original team(s), as well as being part of the new team.

*For team changes to take effect instantly, without agents having to log off and back on again to pick up changes, click the **Broadcast Teams Changes** option.*

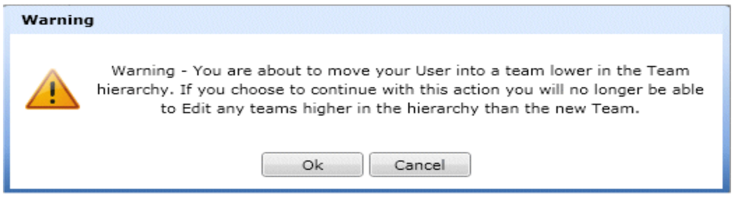
Primary Teams

The user icon shows that a user or agent is displayed in his/her primary/ home team.

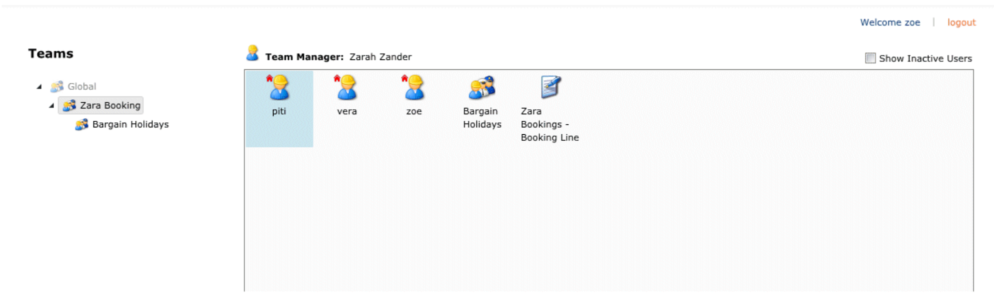
Users can be represented in multiple teams, but the primary team reflects their line of reporting.

Users, unless they have Administrator permission, will only be able to see or edit teams of which they are members or teams that are lower in hierarchy to their current teams.

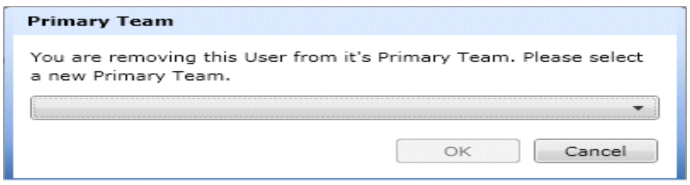
A message to this effect will be displayed when users that are currently logged in move themselves into a lower team.



The user in our example can only see her current team and teams lower in the hierarchy.



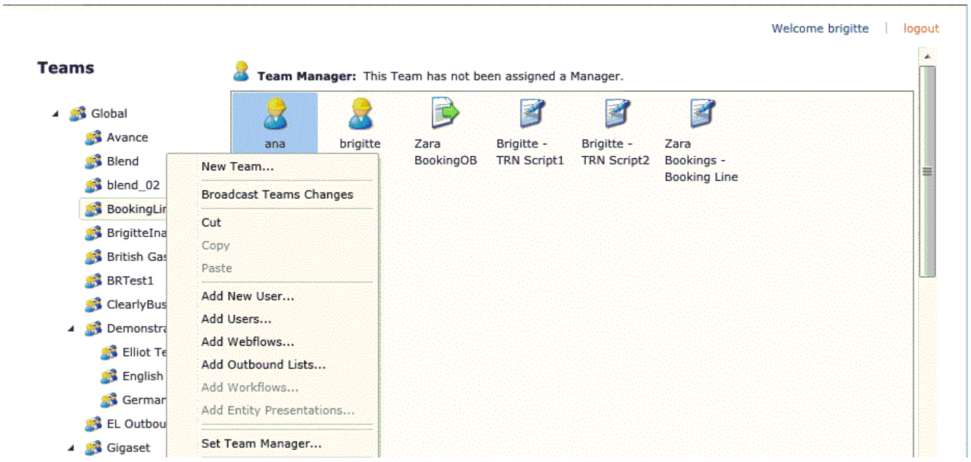
When removing a user from his/ her primary team, a message will prompt you to select a new primary team for that user.



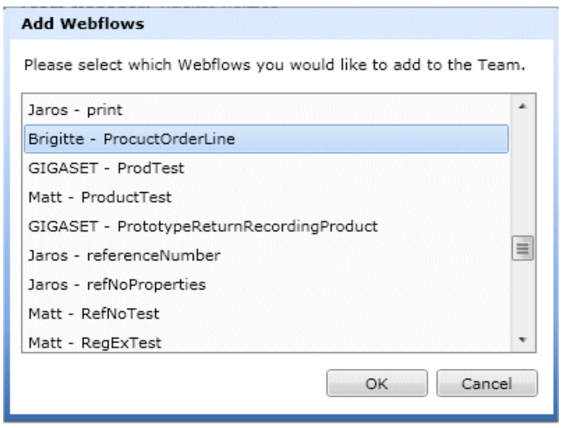
Copying Webflows and Outbound lists to a Team

To add specific webflows and/ or outbound lists, to a team:

- Click the **Teams** tab at the top of the ***Synthesys Management*** screen.
- Locate and right click on the relevant team, and select ***Add Webflows*** or ***Add Outbound* Lists** from the list subsequently displayed.



- In the **Add Webflows** or **Add Outbound Lists** dialog, select the Webflow(s) or Outbound list(s) that you wish to add to the selected team.



- Click ***OK*** to add the webflows or outbound lists to the team. Click ***Cancel*** to cancel the action, without saving the changes.

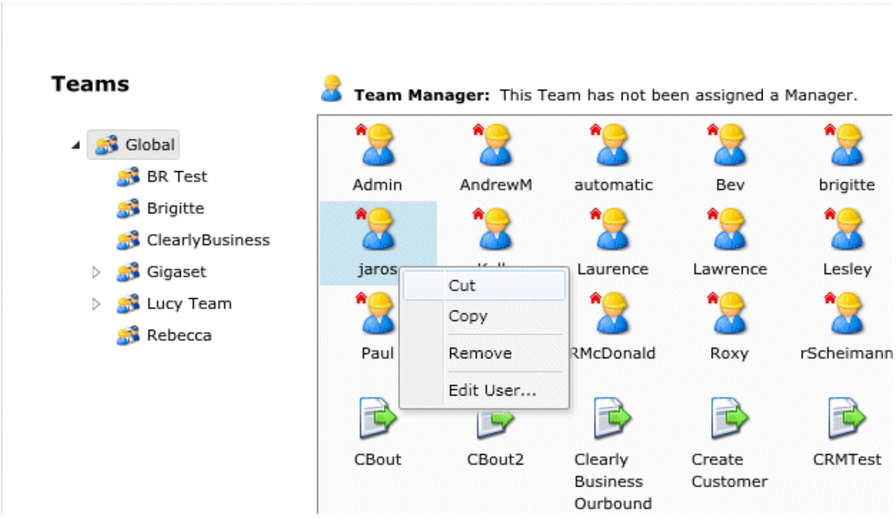
Work Objects that have been copied will remain in their original team(s), as well as being part of the new team.

*For team changes to take effect instantly, without agents having to log off and back on again to pick up changes, click **Broadcast Teams Changes**.*

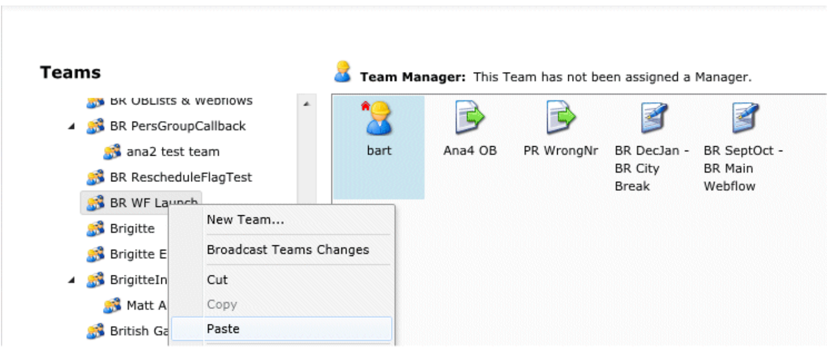
Using Cut & Paste to move Users & Work Objects

To assign agents or work objects (webflows, outbound lists, workflows and entity presentations) to a specific team, without these remaining in the original team(s), use the *cut and paste* option, rather than copy and pasting,

- Click the **Teams** tab at the top of the ***Synthesys Management*** screen.
- Select the relevant source team, to display its content on the right hand side.
- Locate and right click on the relevant user or work object.
- Select ***Cut*** from the drop down list.



- Locate and right click on the destination team.
- Select ***Paste*** from the list displayed, to add the item to the selected team.



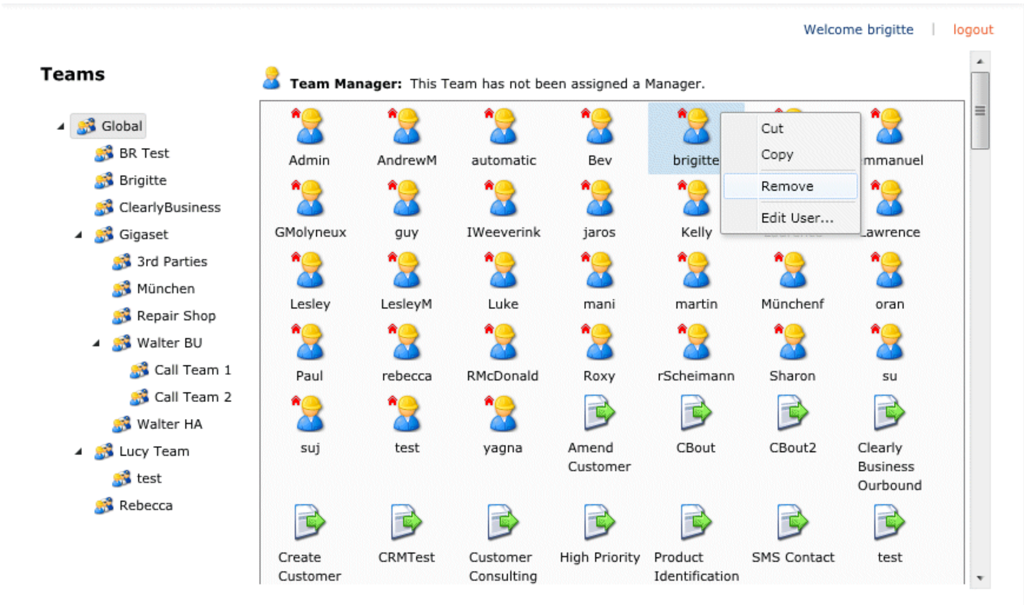
*Users and work objects that are removed from a team using the **Cut & Paste** option will no longer be represented in that team.*

*For team changes to take effect instantly, without agents having to log off and back on again to pick up changes, click **Broadcast Teams Changes**.*

Removing Agents and Work Objects

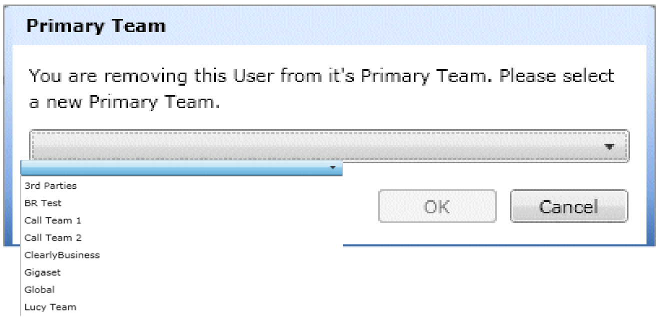
To remove specific agents, (callflows, outbound lists and groups) from a team:

- Click the **Teams** tab at the top of the ***Synthesys Management*** screen.
- Select the relevant source team, to display its content on the right hand side.
- Locate and right click on the relevant user, webflow or outbound list and select ***Remove*** from the list displayed



When removing a user from his/her primary team:

- Click on the arrow in the ***Primary Team*** message box displayed and select a new primary team into which to place the user.



For team changes to take effect instantly, without agents having to log off and back on again to pick up changes, click ***Broadcast Teams Changes****.*

Broadcast Team Changes

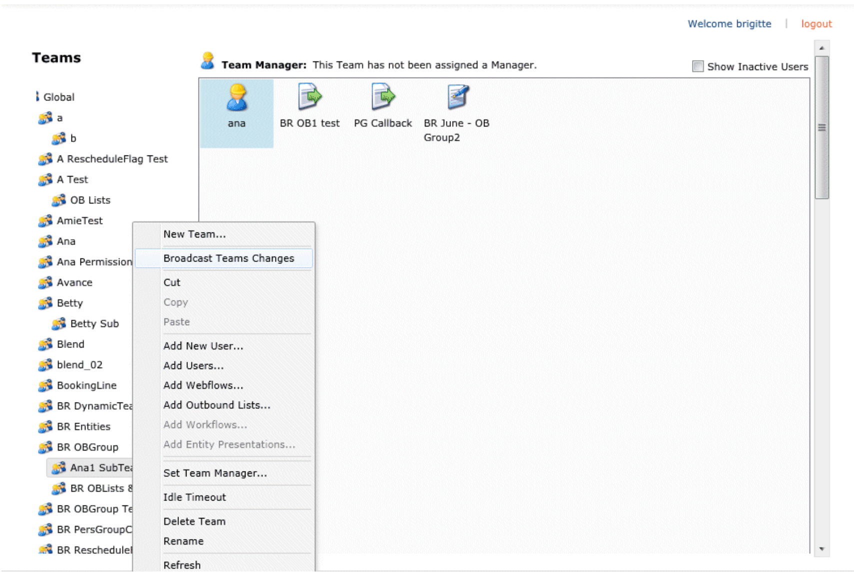
Historically, changes made to teams required an agent to log off and back on again, to pick up the changes.

Customers now have the option to use the system as before, i.e.

- Setting up new teams assignments in advance of a new shift, which will take effect when agents log back in after a break, or
- to use the **Broadcast Teams Changes** option to broadcast the updates instantly, so that agents can pick up any changes directly, without having to log off and back on again.

To use the Broadcast Teams Changes option

- Click the **Teams** tab at the top of the ***Synthesys Management*** screen.
- Select the relevant team, click the right mouse button and select **Broadcast Teams Changes** from the list displayed.
- Any updates will now be broadcast and the changes can be picked up immediately by the agents currently logged in to Synthesys.



TEAM SET-UP USING OUTBOUND GROUPS

Outbound Groups are used to present agents with a combination of calls from multiple call lists of multiple Outbound campaigns.

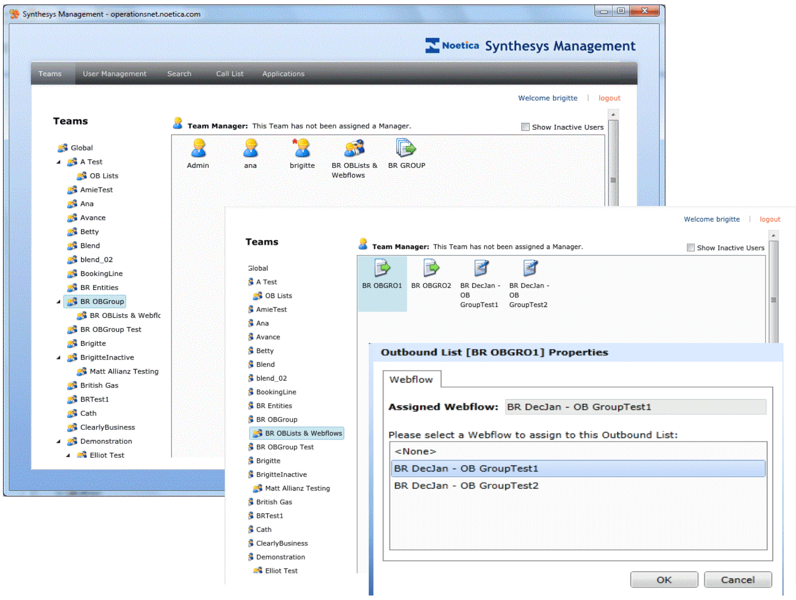
To use outbound groups in Synthesys.Net you need to create two teams, a *main team* to hold the outbound group(s) and agents assigned to the group, and a *sub team* for the individual outbound lists within the group and associated webflows.

Main team

The main team will contain the outbound group(s) and agents assigned to the group.

- Set up a main team and give it a logical name.
- Move your ***outbound group icon*** into this team.

Next, add all ***agents*** that are to take calls on the outbound group into the main team.



Sub Team

The sub team will contain the individual outbound lists assigned to the group and associated webflows.

- Set up a sub team under the main team that you have created.
- Move the ***individual OB lists*** that form part of your group into the sub team.
- Move the ***webflows*** associated to the individual lists into the sub team.
- Right click on each outbound list and via the ***Properties*** dialog, ***assign*** each outbound list to the relevant webflow.

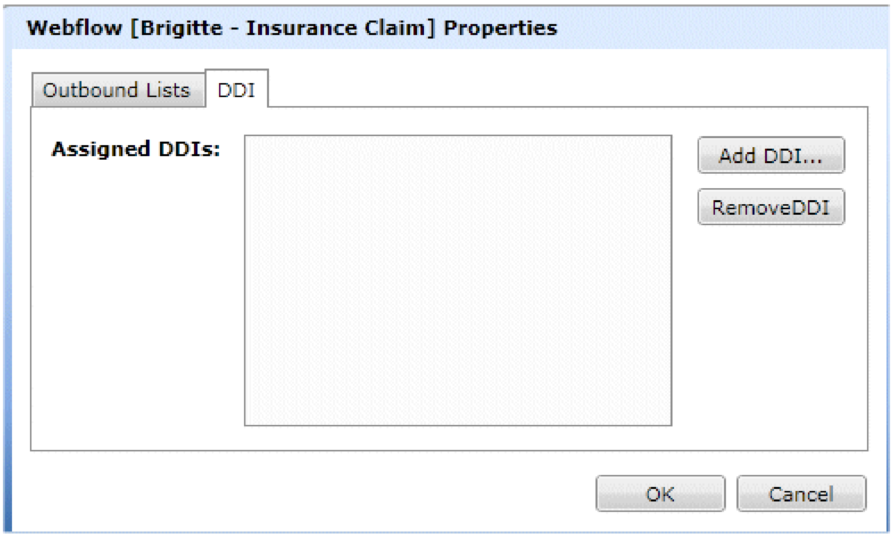
DDI MAINTENANCE

The *DDI* option in Synthesys Management is used for adding, modifying and deleting **DDI** (*Direct Dial In)* details.

Assigning DDI to an Inbound Webflow

To assign a DDI number to an Inbound webflow

- Right click on the relevant webflow and select ***Properties*** from the drop down menu to open the *Webflow Properties* dialog**.**
- Select the **DDI** tab to view DDIs currently assigned to the selected webflow or to enter a new DDI.
- To enter a new DDI, click the ***Add New DDI*** button on the right of the dialog.
- Enter the DDI number to be used for the webflow in the ***Enter DDI*** dialog.



- Click OK to save the DDI number entered.
- Click Cancel to close the dialog without saving the changes.

To remove an existing DDI number from the selected webflow

- Select the DDI that you wish to remove and click the ***Remove DDI*** button.

A DDI can only be assigned to one Webflow at a time. If the DDI entered has already been assigned, a message will be displayed: "The ddi <DDI Entered> has already been assigned to <Webflow Name>."

*User then can either **Cancel** the current add DDI operations or select the*

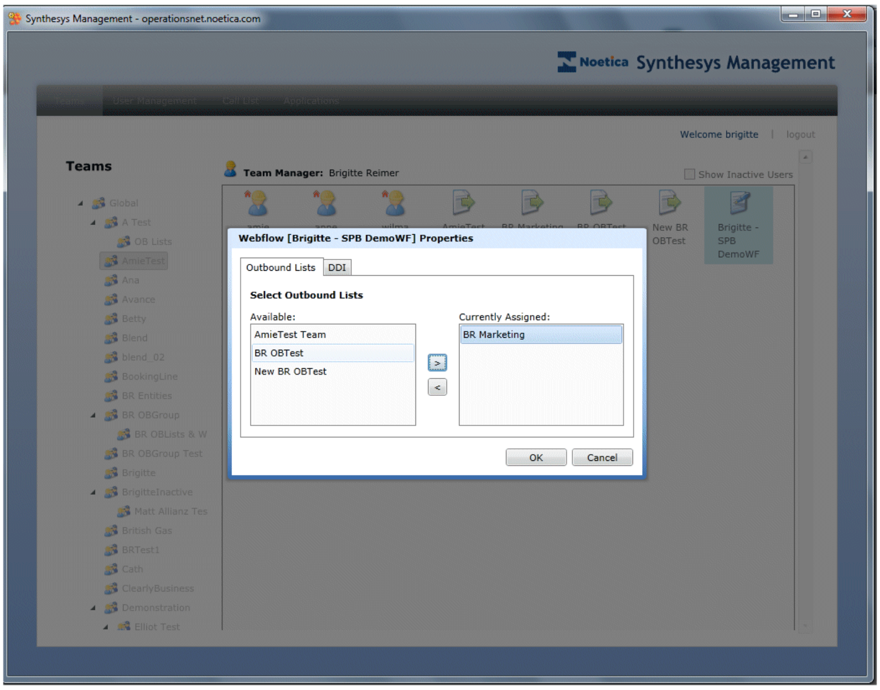
***Change Assignment** option to remove the assignment from the current campaign and assign the new campaign.*

Assigning Outbound Lists to a Webflow

To assign an Outbound list to a webflow

- Right click on the webflow and select ***Properties*** from the drop down menu to open the *Webflow Properties* dialog**.**
- Under the **Outbound Lists** tab *Available* and *Currently assigned* Outbound lists are displayed.
- Select the Outbound list that you wish to assign in the ***Available*** list and use the arrow **>** to move it into the ***Currently assigned*** section.
- To remove an Outbound list, select it in the ***Currently assigned*** section and use the arrow **<** to move it back into the ***Available*** list.

Outbound lists are only displayed in the Available section, if the lists are in a team that the webflow is also in and if the user has rights to the team that holds the outbound list (i.e. they can see the team).



- Click **OK** to save the action or **Cancel** to close the dialog without saving the changes.

An Outbound list can only be assigned to one Webflow at a time. If it has already been assigned, a message will be displayed: "The Outbound list has already been assigned to <Webflow Name>."

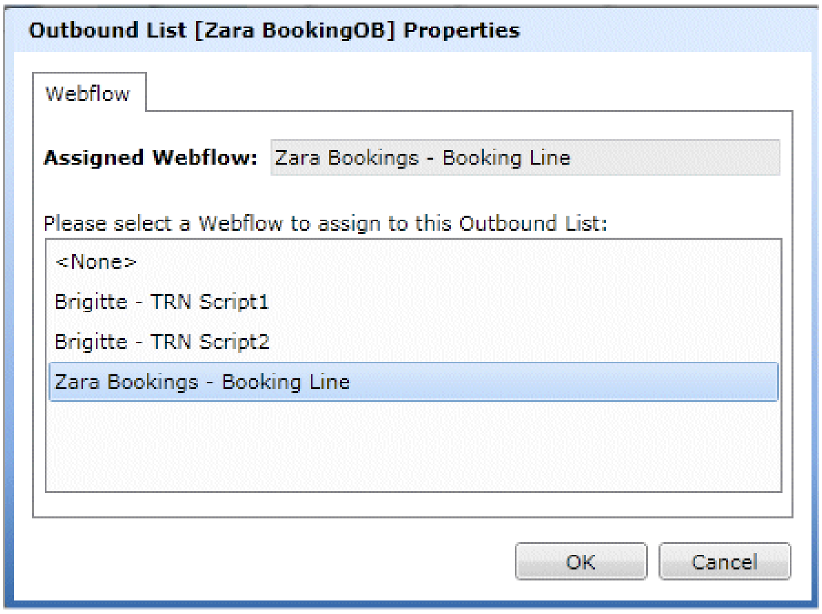
Users then have the option to change the assignment from the current Webflow to the new Webflow or to cancel the action.

Assigning a Webflow to an Outbound List

To assign a webflow to an Outbound list

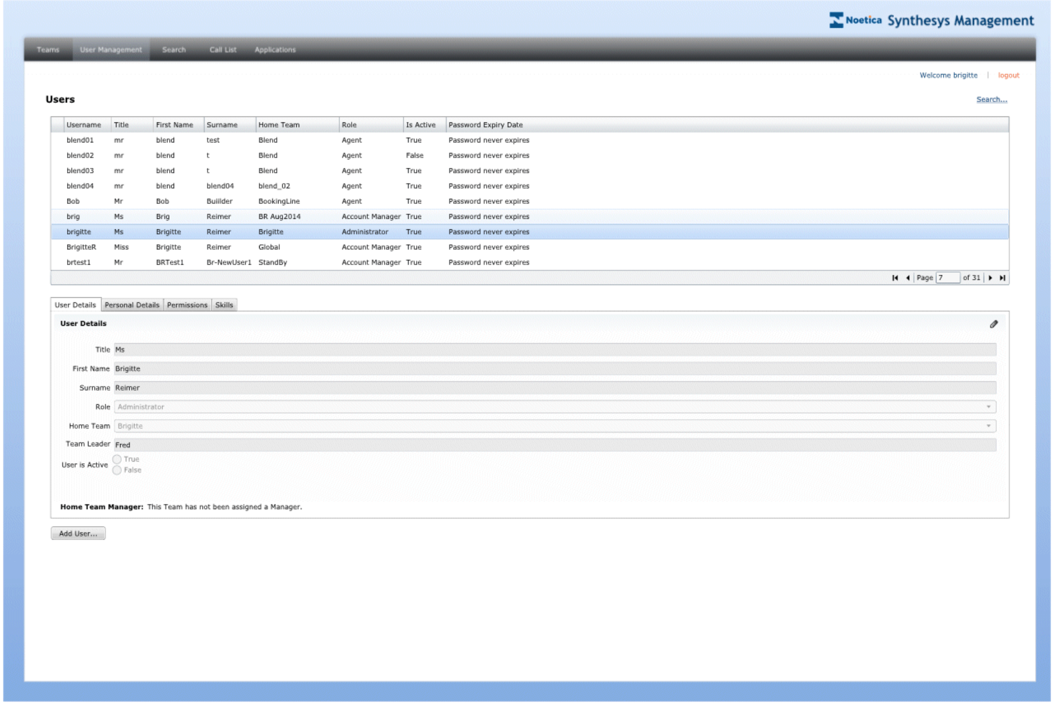
- Right click on the relevant Outbound list and select ***Properties*** from the drop down menu to open the *Outbound list Properties* dialog**.**
- The Webflow tab shows the current webflow assigned to the selected Outbound list, if any, and allows the user to reassign the list to another webflow. If there is already a Webflow assigned it is highlighted in the list.
- Select the webflow that you wish to assign to your Outbound list.

The webflows displayed only include the webflows that are in a team that the Outbound list is also in and teams that are available to the user logged on, i.e. if the user has permissions for and can see the team that holds the webflow.



- Click **OK** to save the action or **Cancel** to close the dialog without saving the changes.

Synthesys User Management



SYNTHESYS USER MANAGEMENT

Introduction

Depending on the permissions assigned to a user, individuals with access to the *User Management* page will be able to:

- View details of existing users
- Add new users
- Assign permissions to individual users
- Assign specific skills and attributes to users
- Modify details and permissions of existing users

New user skills and attributes are initially added to the CS_USERS table via the Entity/ CRM control. They are then assigned to the individual users in Synthesys Management, using the Skills tab of the User/ User Details dialogs.

*Using **Active Directory** integration, users will be created and managed directly through Active Directory, rather than via Synthesys User Management. Please see the section on Active Directory for more information.*

STARTING SYNTHESYS USER MANAGEMENT

In the Synthesys Management main page:

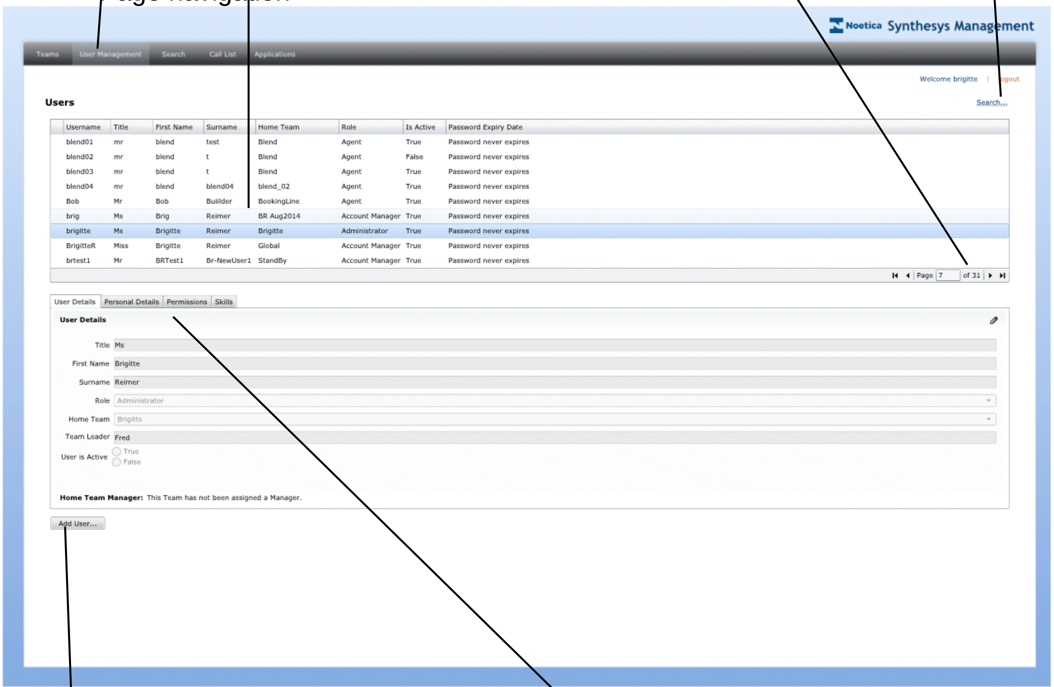
- Click the **User Management** tab at the top of the screen.
- The ***Users*** page will be displayed, showing the first ten Synthesys users in alphabetical order.

User Management tab, to open the *Users* pages

Users section, listing users set up in Synthesys

Search option

Page navigation



User Details section with Personnel Details, Permissions & Skills tabs

Add User button, for entering new user details

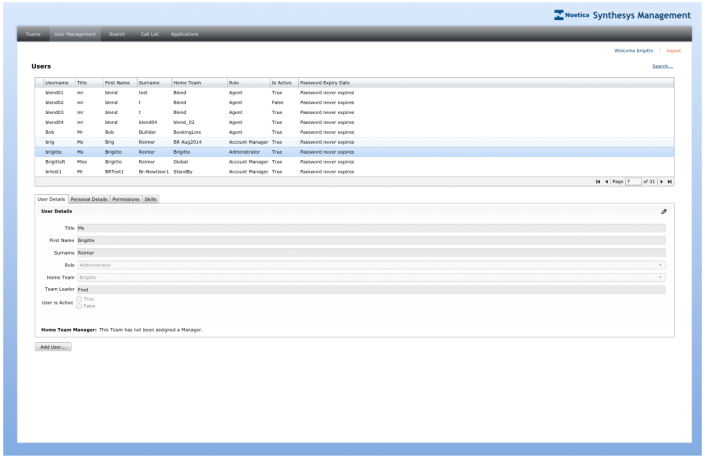
Please see the following pages for a description of the options available in the *User Management* page.

Viewing User Details

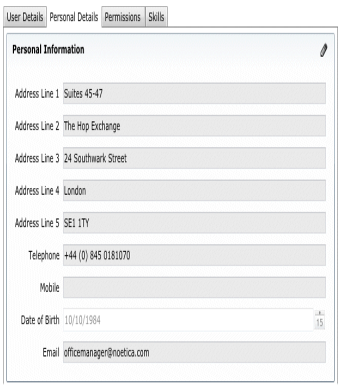
In the Synthesys Management main page:

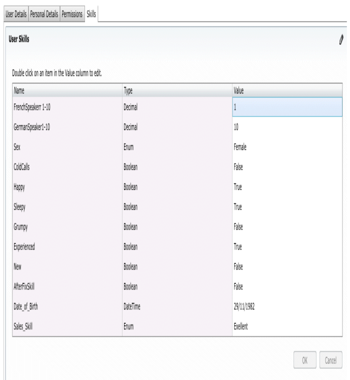
- Click the **User Management** tab at the top of the screen, to display the ***Users*** page, initially showing the first ten Synthesys users in alphabetical order.
- To display further users on subsequent pages, enter a specific page number, or use the arrow buttons 

, to move to the next page.



- Select a specific user in the ***Users*** *section*, to display additional details in the ***User Details*** section, including *user name*, the *Role, Primary Team* and current user state.
- Click the ***Personnel Details*** tab, to view further personal information associated with the user.
- Click the ***Permissions*** tab, to view the access permissions assigned to the user.
- Click the ***Skills*** tab, to view skills and attributes assigned to the user.

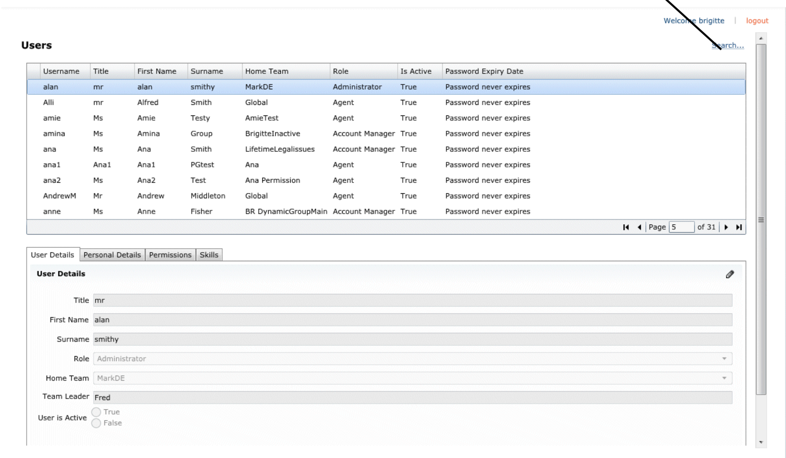




Locating individual Users

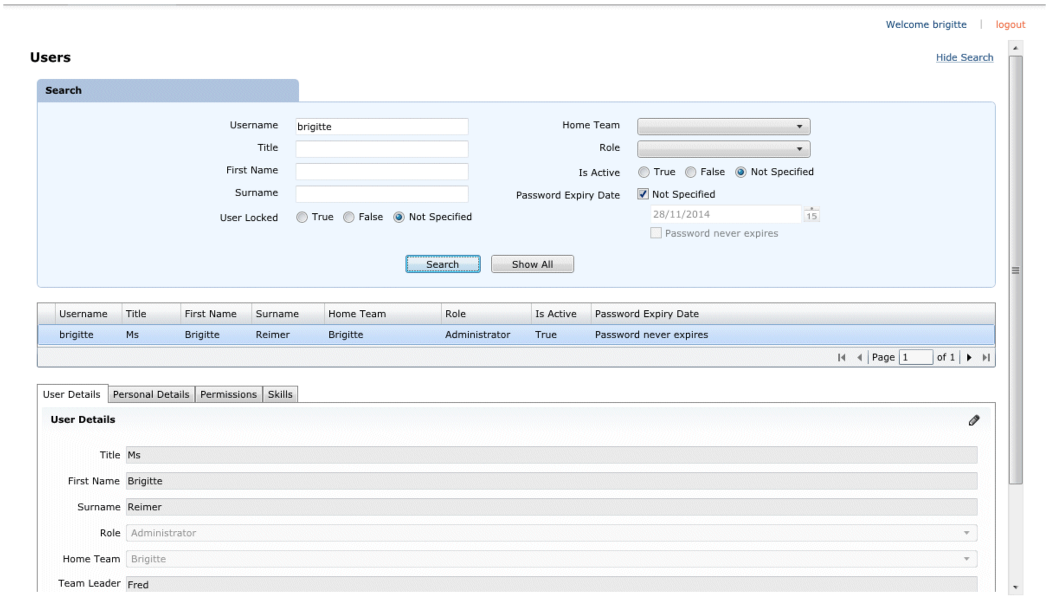
To look up details for a user or users assigned to a specific role, use the **Search** option in the ***User Management*** screen.

- On the top right of the *Users* page, click **Search**.



This will open the Search dialog.

- Enter your search criteria, as required, into the relevant field(s).
- Click the Search button, to display the relevant information.



- To edit user details, click the *pencil icon*  on the right.
- To show the list of all users again, click the ***Show All*** button.

Adding New Users

Details for new users are added in the *User Details* page, *permissions* and skill are assigned in the *Permissions* and *Skills dialogs*.

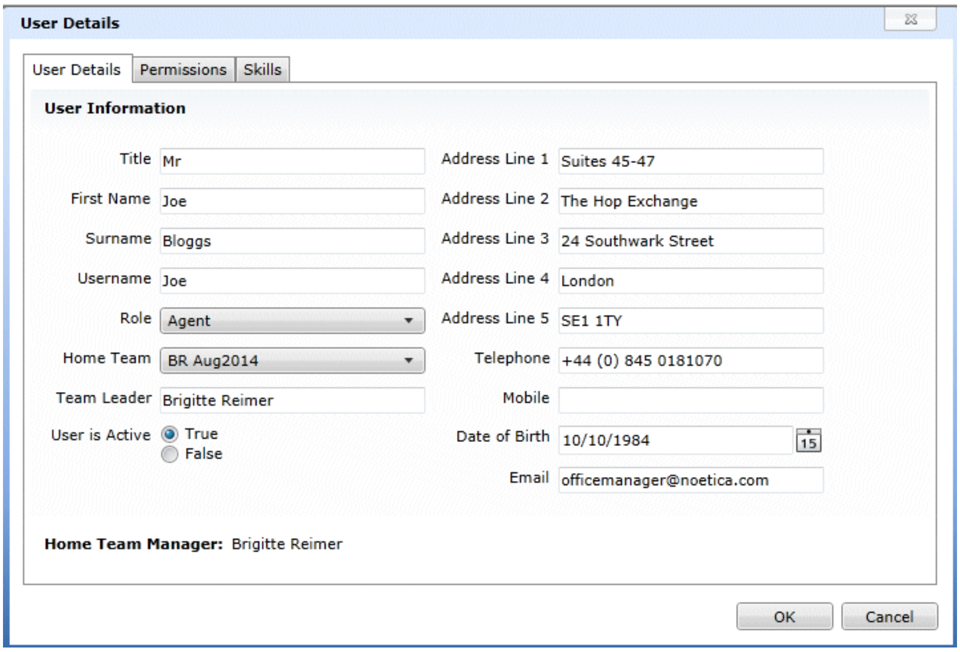
*Using **Active Directory** integration, new users will be created directly through Active Directory, rather than via Synthesys User Management. Please see the section on Active Directory for more information.*

To add details for new members of staff using *Synthesys Management*:

- Click the ***User Management*** tab at the top of the *Synthesys Management* screen.
- In the **Users** page, right click on a user and select *Add User*... from the drop down menu, or alternatively click the ***Add Users*** button at the bottom left of the *User Details* section.

In the **User Details** dialog subsequently displayed

- Enter the personal details and login details for the new user and select a role, a primary (home) team and add a team leader, as required.



- Click the **Permissions** tab, to assign the required access permissions for the user.

Please see next page for more information.

Assigning User Permissions

When adding new users, the users are assigned to a role, reflecting the tasks that they will carry out within Synthesys.

Each role, i.e. ***Agent*** or ***Account Manager***, has a set of standard permission associated with the role. Additional permissions can then be assigned to a selected user via the *Permissions* dialog.

- Click the **User Management** tab in the Synthesys Management screen.
- In the ***Users*** page, locate and right click on the user, whose permissions you wish to edit.
- Select ***Edit User..*** from the drop down menu.

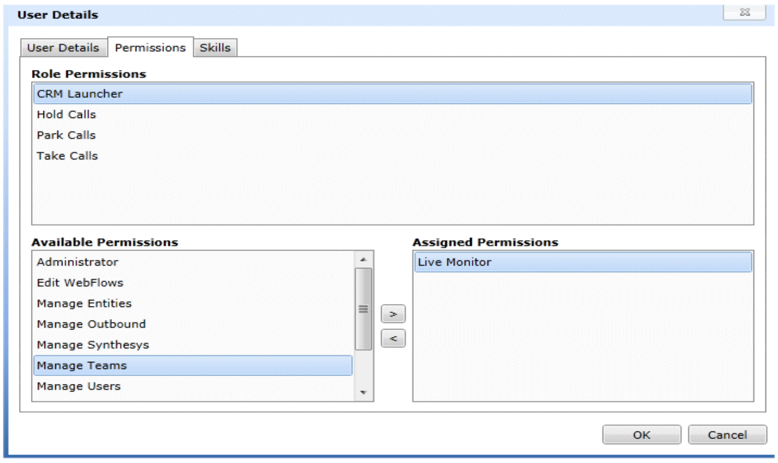
- In the User Details dialog, select ***Permissions***.
- The existing user permissions are displayed in the *Role Permissions* section.

To add additional permissions

- Select the permission in the ***Available* Permissions** section.
- Use the arrow > to move it into the **Assigned Permissions** section.

To remove additional permissions

- Use the arrow < to move the permission from Assigned Permissions back into the ***Available*** Permissions section.



- Click **OK** to save the information.
- Click **Cancel,** to cancel the action without saving the changes.

Available Permissions

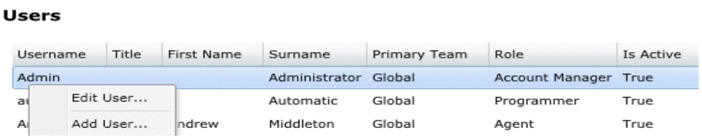
Permission	Description
Administrator	The Administrator permission automatically allows access to all available permissions.
CRM Launcher	Not applicable in the current version.
Edit Webflow	Permission to edit webflows in the Synthesys.Net Interaction Studio. If the *Use Team Based Webflow Edit Permission* option is enabled, then users without Administrator permission need to be a member or team manager of the same team as the webflow, or of one of the parent teams of the team containing the webflow, to edit/ publish webflows.
Hold Calls	Permission to *Hold and* retrieve *held* calls via the Synthesys Portal in the Web Browser and to view call details of held calls.
Live Monitor	Permission to view *real-time* information of call centre activities in the Synthesys Dialler Platform, with information about Queue distribution, Agent State, Handled Call Results being visually represented in graphs.
Manage Outbound	Permission to access the Synthesys Outbound Manager to add, view and manage outbound call lists.
Manage Teams	Permission to move users between teams in the Synthesys Management module.
Manage Users	Permission to add and modify users in the Synthesys Management module and to manage user permissions.
Parked Calls	Permission to *Park* and retrieve parked calls via the Synthesys Portal in the Web Browser and to view details of parked calls.
Publish Webflows	Permission to publish webflows in the Synthesys.Net Interaction Studio so that agents can take calls on the latest version. If the *Use Team Based Webflow Edit Permission* option is enabled, then users without Administrator permission need to be a member or team manager of the same team as the webflow, or of one of the parent teams of the team containing the webflow, to edit/ publish webflows.
Report Viewer	Not applicable in the current version.
Take Calls	Permission to handle calls via the Synthesys Portal in the Web Browser.
Manage Entities	Permission to configure the Entity control and Entity Input and Output actions.
Manage Synthesys	Gives users the right to access Workspace Management and to manage users and teams.
Manage Workflows	Not applicable in the current version.

Assigning User Skills and Attributes

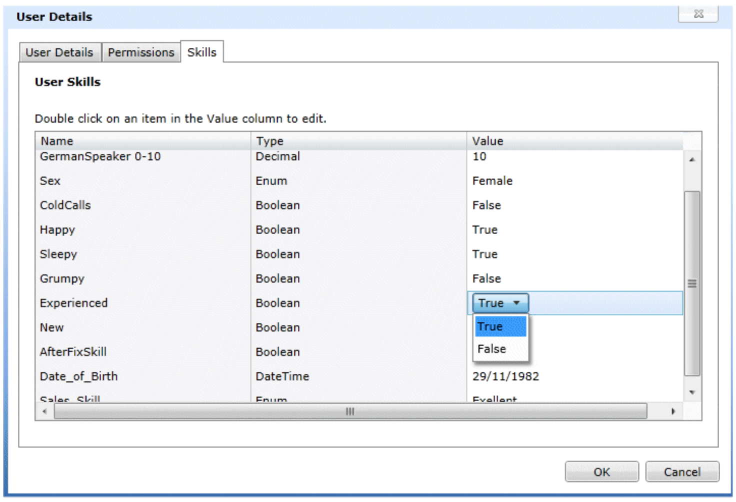
Skills and attributes are assigned to users via the **Skills** tab of the *User Details* dialog.

New user skills and attributes are initially added to the CS_USERS table via the Entity/ CRM control. They are then assigned to the individual users in Synthesys Management, using the Skills tab of the User/ User Details dialogs.

- Click the **User Management** tab at the top of the Synthesys Management screen.
- Locate and right click on the user and select ***Edit User..*** from the drop down menu to open the User Details dialog.



- In the User Details dialog, select ***Skills***.
- In the Skills page, all available user skills and attributes, as added to the CS_USERS table via the Entity/ CRM control, are displayed.

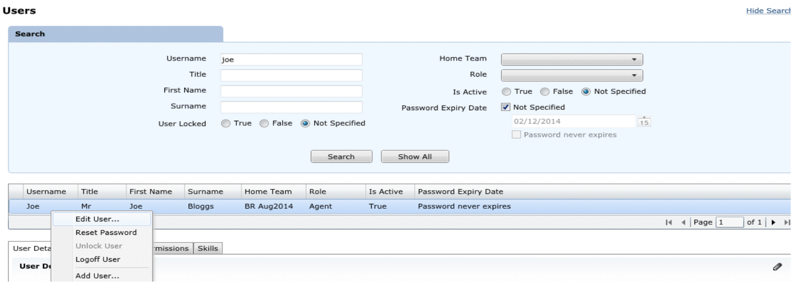


- Assign the skills and attributes for the selected user, as required, in the **Value column** of the Skills dialog.
- Click **OK** to save the information.
- Click **Cancel,** to cancel the action without saving the changes.

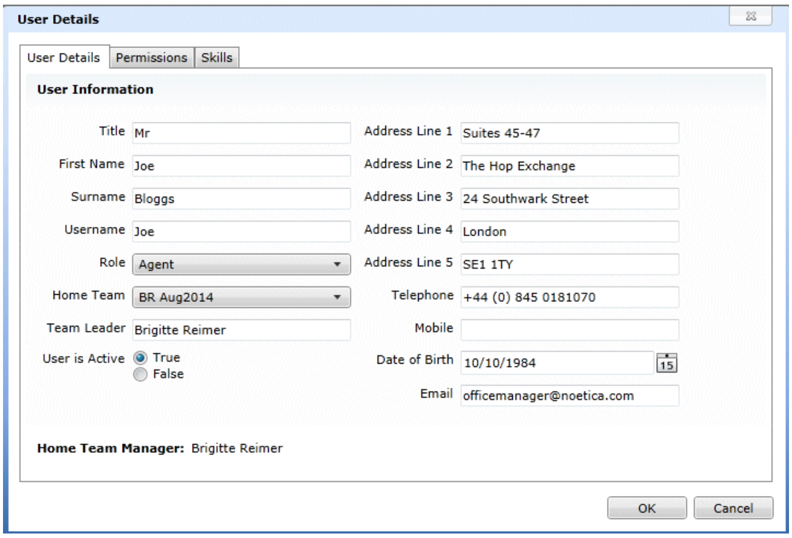
Modifying User Details

To edit information for existing users:

- Click **User Management** in the *Synthesys Management* main page.
- In the **Users** page click on **Search** in the top right of the *Users* page
- Click your right mouse button on the user and select ***Edit User***... from the list.



- In the **User Details** dialog now displayed, make any changes to the existing details, as required.
- To change existing permissions, click the **Permissions** tab.
- To change existing skills, click the **Skills** tab.

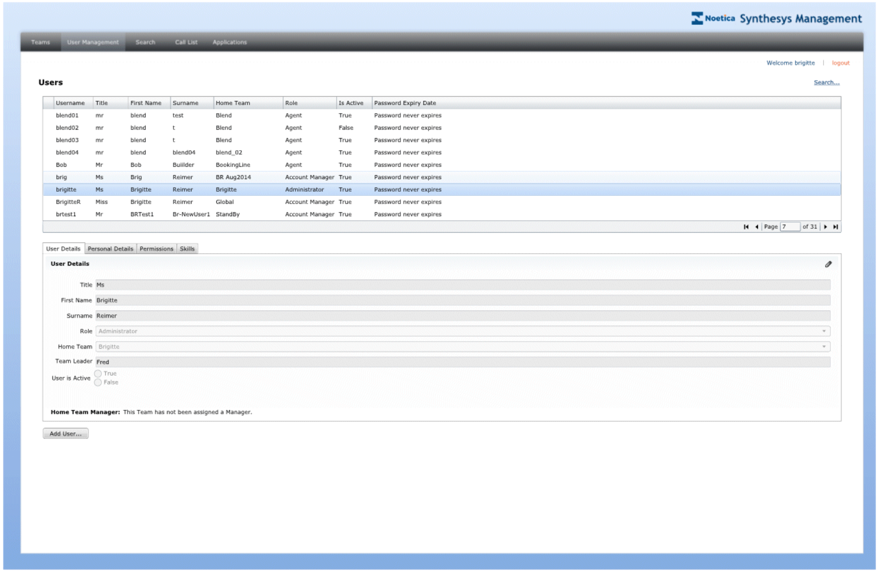


Click **OK** to save the information, or **Cancel** to cancel the action without saving the changes.

*Using **Active Directory** integration, a user's details will be modified directly through Active Directory, rather than via Synthesys User Management. Please see the section on Active Directory Integration for more information.*

To edit user details following a search in the **Users** screen

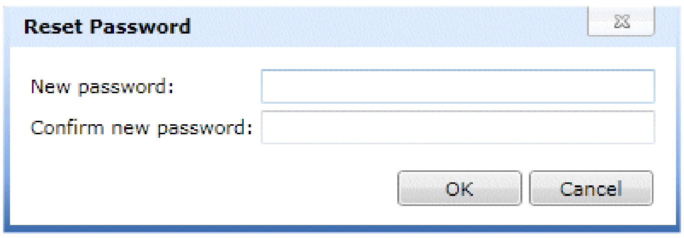
- Click the pencil icon  to open the *Edit* mode.
- Exit the *Edit* mode by clicking on the *pencil icon* again, before selecting another tab.



Resetting an existing Password

To reset an existing user password:

- Click **User Management** in the *Synthesys Management* main page.
- In the **Users** page, click your right mouse button on the user and select ***Reset Password***... from the list.
- Enter and confirm the new password, then click OK

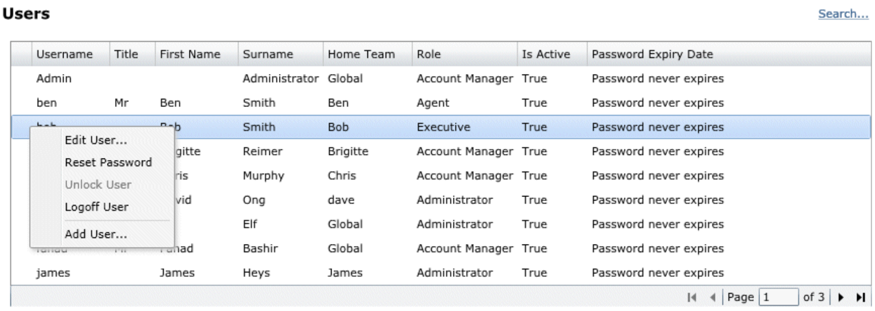


*Using **Active Directory** integration, a user's password will be changed directly through Active Directory, rather than via Synthesys User Management. Please see the next section on Active Directory Integration for more information.*

Unlock User

To enable a user to log back into the Synthesys Portal after being locked out for using an incorrect user name or password

- Click **User Management** in the *Synthesys Management* main page.
- In the **Users** page, right click on the user, and select ***Unlock User*** from the drop down list.

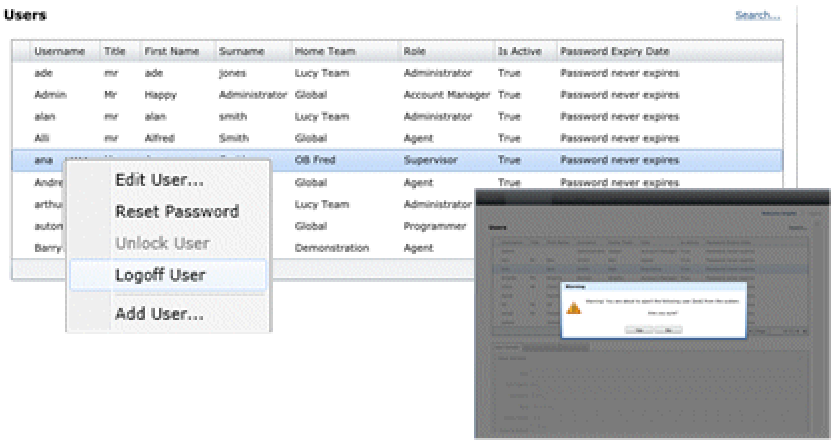


Logoff User

Using the **Logoff User** option users can be ejected from the system. This is useful if, for example, a user is logged out following a system crash and unable to log back in.

To force the simultaneous logoff from all Synthesys.Net modules, including Synthesys Management, the Synthesys Interaction Studio and the Synthesys Portal

- Click **User Management** in the *Synthesys Management* main page.
- In the **Users** page, right click on the user, and select ***Logoff User*** from the drop down list.



- A message will inform you that you are about to eject the selected user from all Synthesys.Net modules.

ACTIVE DIRECTORY INTEGRATION

If your system is ***Active Directory*** enabled you will have the ability to import users directly from your companies Active Directory.

Running with active directory integration enabled does change the behaviour of ***Synthesys User management*** as a lot of the management of users is managed outside of Synthesys.

Using active directory, the following functions in Synthesys are not available or affected:

Changing passwords

Is no longer managed in Synthesys User management but via the windows change password mechanism.

Deactivating users

This is no longer possible from within Synthesys. To deactivate a Synthesys user they must be removed from Active Directory.

Synthesys will periodically scan Active Directory for removed or deactivated users and will then deactivate them from within Synthesys.

Reactivating users

This is no longer possible from within Synthesys. If a user with the same credentials (User name) is reactivated or recreated in Active Directory the following behaviour can be enabled within Synthesys when the user is reimported.

a. When the user is imported again Synthesys will reactivate the user
b. When the user is imported again a new user will be created.

The behaviour described above is determined by the System administrators, only one of the above behaviours will be enabled.

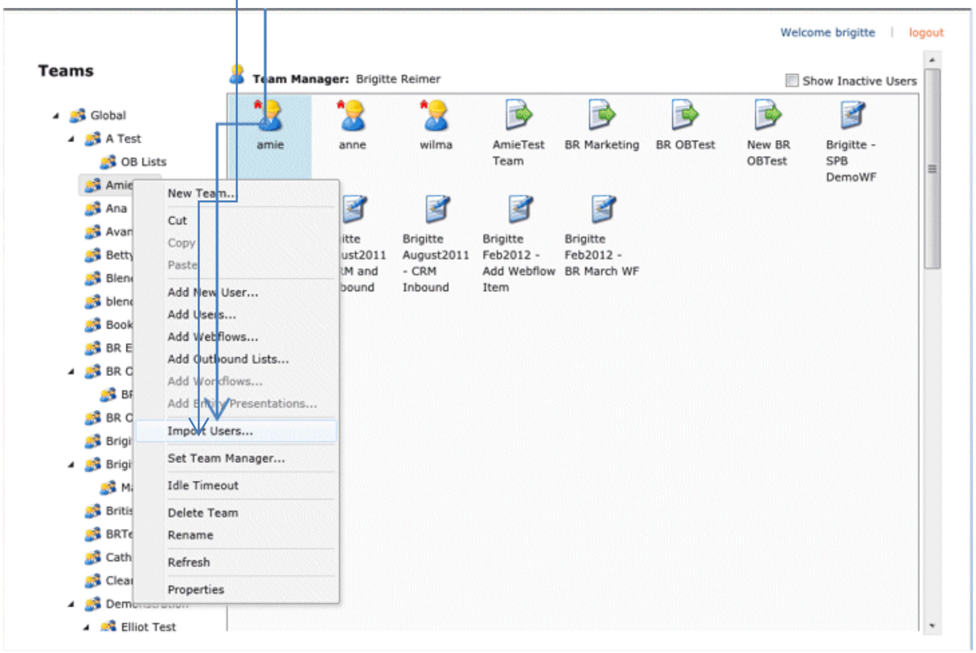
Changing roles

This is no longer possible in Synthesys. The roles of a user are determined by the import mechanism, as part of the original configuration, the Active Directory Security groups will be mapped to Synthesys user roles.

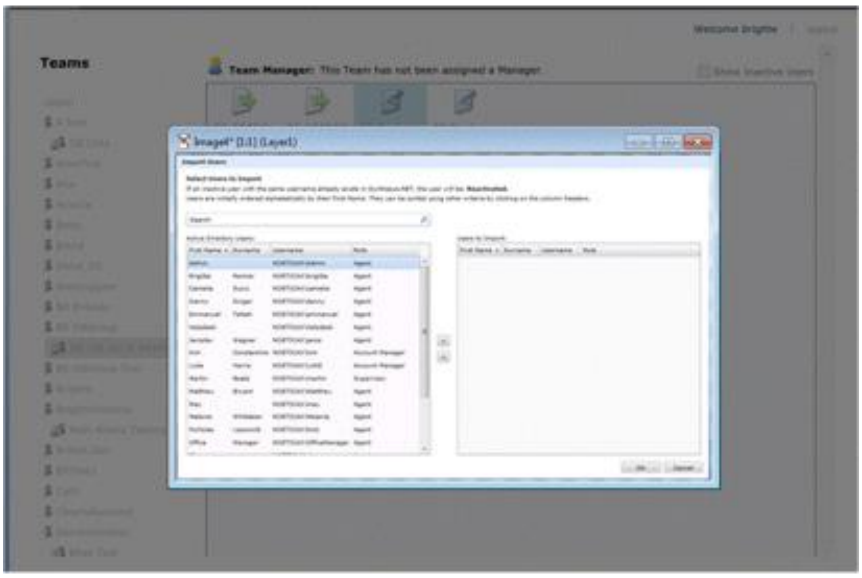
Importing Users from Active Directory

In order to import users from Active Directory

- Click the ***Teams*** tab at the top of the **Synthesys Management** screen.
- Select the ***Import Users*** option from the drop down menu.

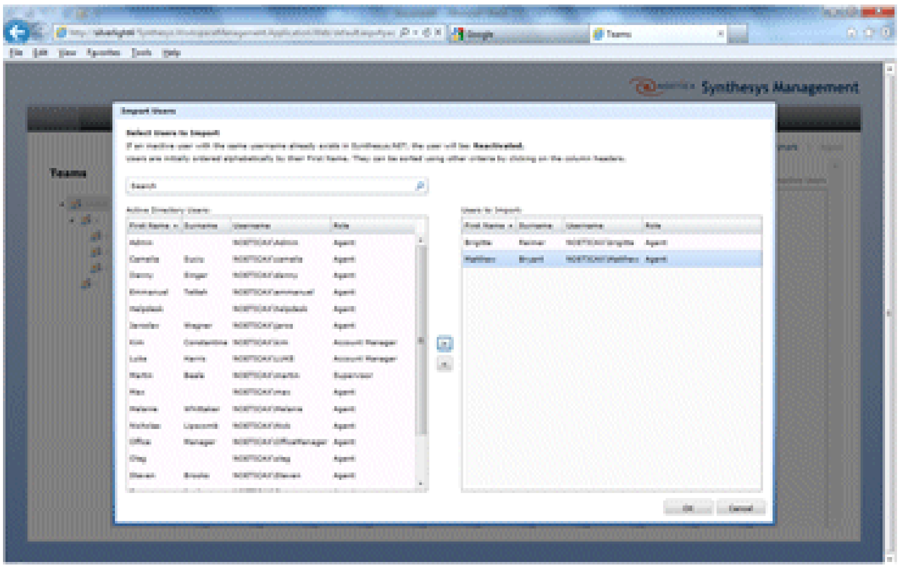


When selected, a list of available users will be shown. This may take up to 60 seconds to display whilst it is querying Active Directory.



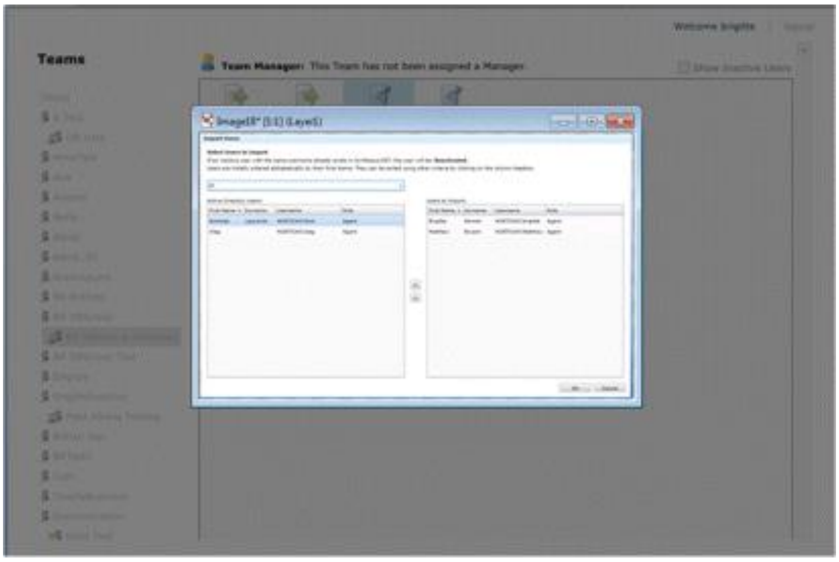
To import a user

- Select a user from the list and press the > arrow to move the selected user into the ***Users to Import*** list



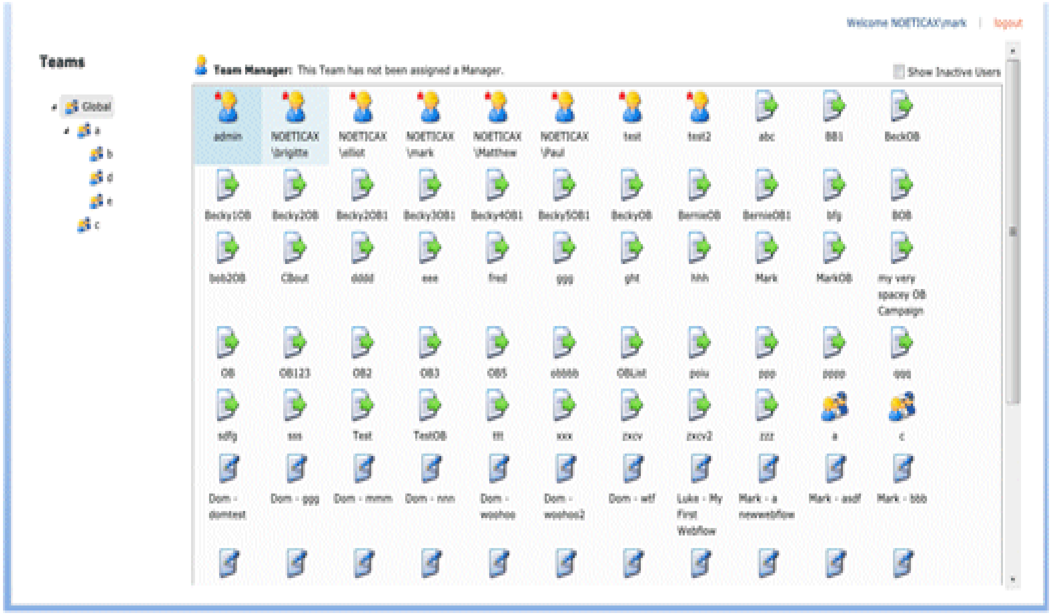
If you need to search for a user

- Enter the user's first name, surname or username in the search box to. The search will start automatically when the second letter is typed.



When you have added all the users that you wish to import into the *Users to Import* list

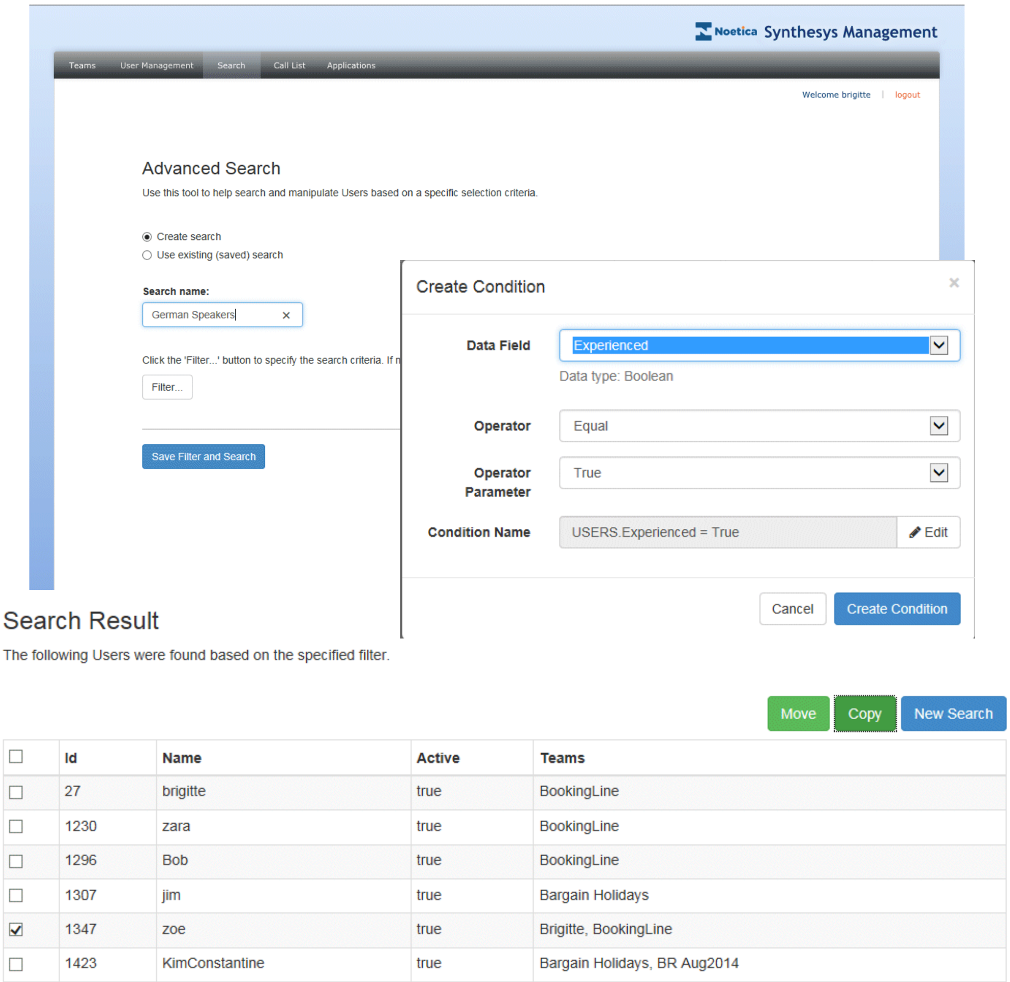
- Press ***OK*** to return to the team view, displaying the new users.



SYNTHESYS MANAGEMENT

SEARCH

User search based on skill sets and attributes



SKILLS BASED USER SEARCH

The advanced **Search** option in Synthesys Management enables contact centre managers or supervisors to search for users based on their skills and attributes, and to assign these users to the relevant teams.

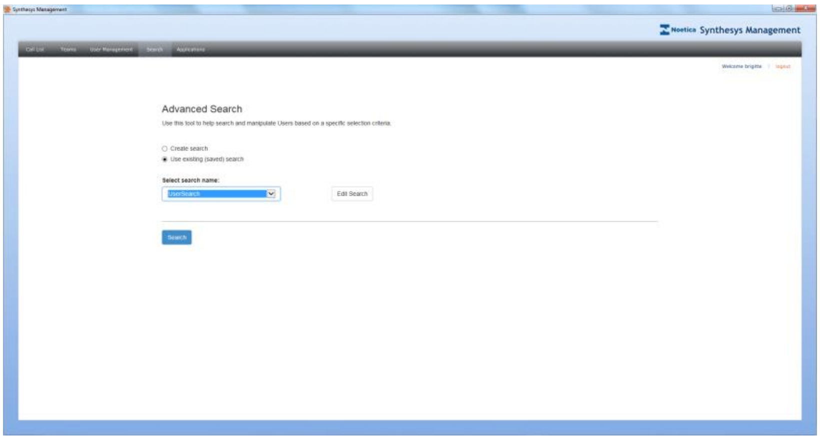
From the **Search** tab, via the ***Advanced Search*** dialog, supervisors can specify conditions for a new search or select a previously defined search.

Staff members that match the search criteria are displayed in the **Search Result** dialog, from where they can be moved or copied to the appropriate teams.

New skills and attributes are initially added to the CS_USERS table via the Entity/ CRM control. They are then assigned to the individual users in Synthesys Management, using the Skills tab of the User/ User Details dialogs.

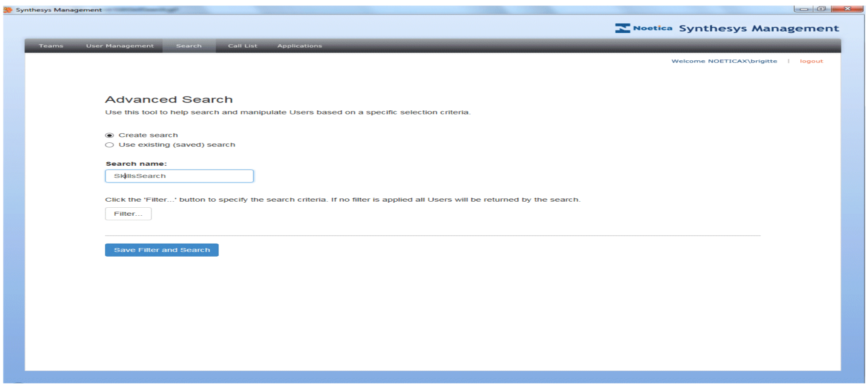
Selecting existing search criteria

- Click the **Search** tab in Synthesys Management.
- Select **Use existing (saved) search** in the *Advanced Search* dialog.
- In the **Search name** field, select the relevant search name from the drop down list.
- To edit existing conditions created for the selected search name, click the **Edit Search** button.
- To view the results for the selected search click the **Search** button.



Creating a new search

- Click the **Search** tab, to open the ***Advanced Search*** dialog.
- Select **Create search,** click into the **Search name** field, and enter a new search name.
- Click the **Filter…** button, to define the new search criteria, as required.



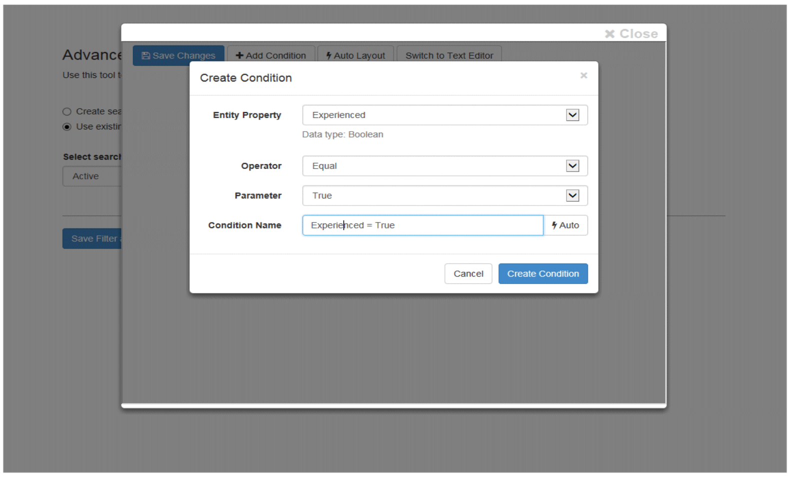
Please see next page for more information.

Defining Criteria for a new Search

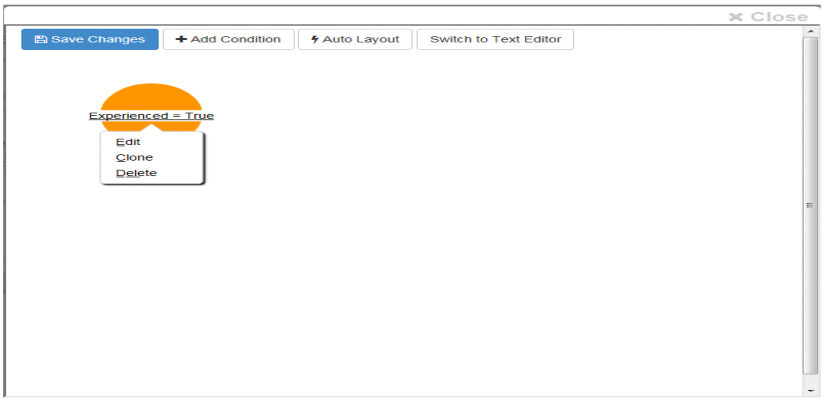
In the *Create Search* dialog you can add conditions to search for Users based on a specific selection criteria. You can create criteria for a new search, and edit or delete the condition discs created. The condition discs can be displayed in auto layout or via the text editor.

To define conditions for the first search criteria

- Click the **Add Condition** button, to open the ***Create Condition*** dialog.
- Use the **Data Field** drop down list, to select the criteria on which to base your search, e.g. Experienced.
- Select the relevant **Operator and Operator Parameter** from the respective drop down lists, i.e. Operator **= Equal** and Operator Parameter = **True.**
- The **Condition Name** field shows the search criteria set: USERS Experienced = True.



- Click the **Save Condition** button, to save the criteria for the current condition.
- Click **Cancel**, if you do not wish to create the condition.



- Create any further conditions as required following the above steps.

Edit, Clone or Delete Search Conditions

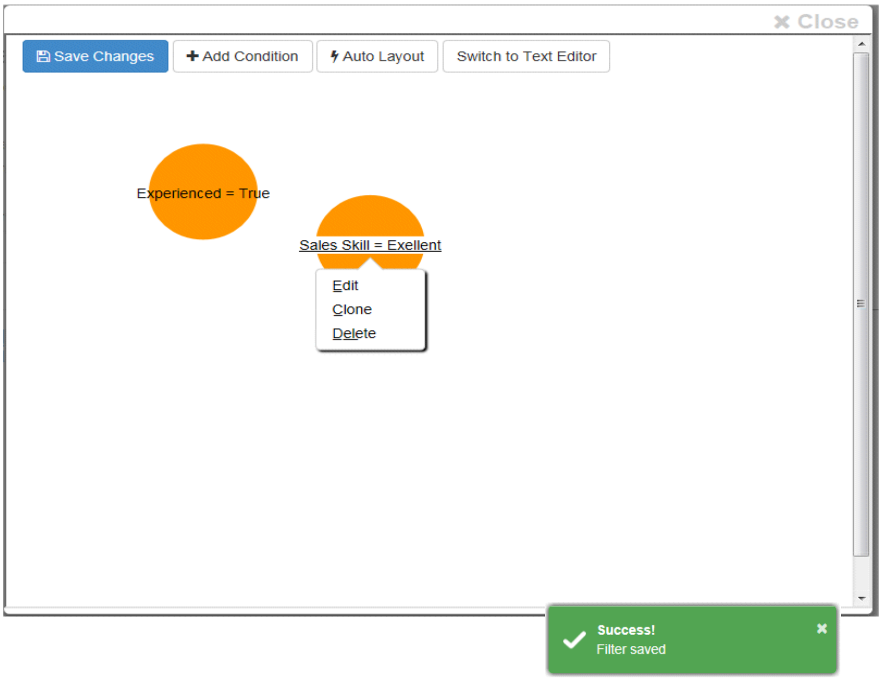
To edit, clone or delete a condition created

- Select the condition disc that you wish to edit.
- Click on the condition name and select **Edit, Clone** or **Delete** as required.
- Make the relevant changes in the Edit Condition dialog.
- Click the **Save Condition** button, to create the condition.
- Click **Cancel**, if you do not wish to create the condition.

Saving Changes to Conditions set

To save all search criteria defined for the new Search name

- Click the **Save Changes** button.
- A message: ***Success! Filter saved*** will appear at the bottom right of the dialog, to confirm that the condition has been saved.



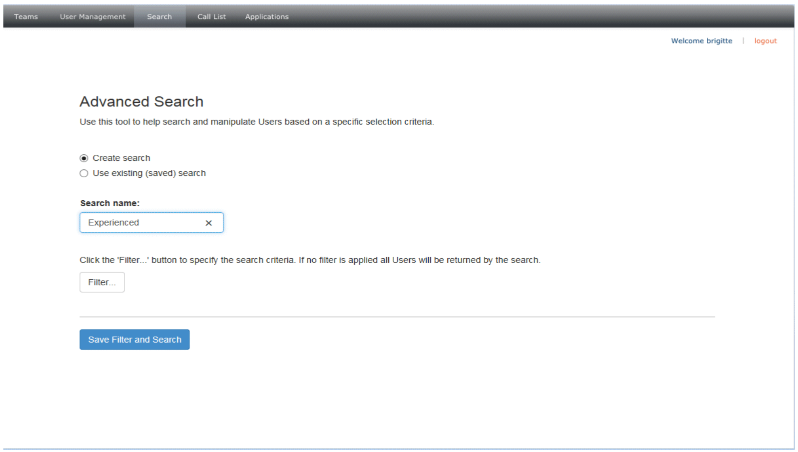
- Click the CLOSE button at the top right of the screen, to return to the *Advanced Search* page.

The next page describes how to view the search results for your condition(s) set.

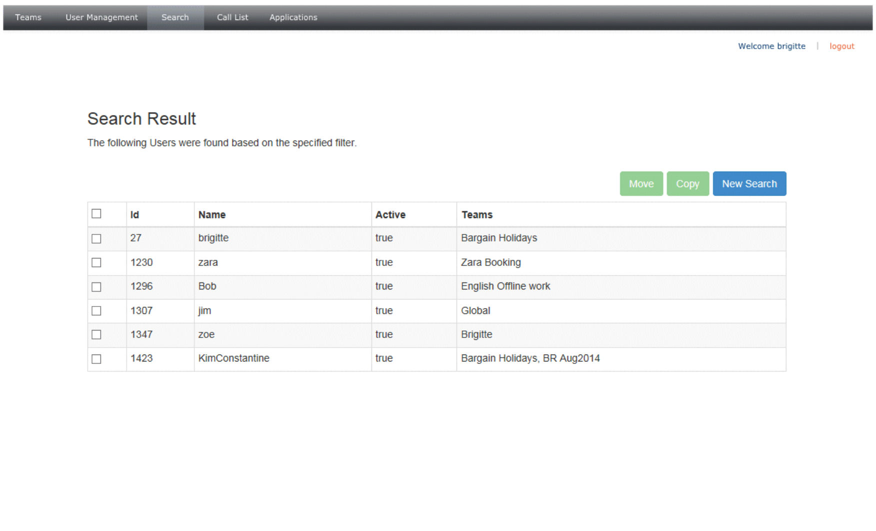
Viewing Search Results

To return the users that match either a newly created or existing search

- Check that the **Search name** field contains the name of the relevant search.
- Click the **Save Filter and Search** button, to open the *Search Result* dialog.



- All users that match the particular skills and attributes, as defined under the selected search name, will now be displayed in the *Search Result* screen.
- The **ID** and **Name** columns in the grid show the User ID and Username of staff members displayed. The **Active** column shows *True* if a user is active, else *False.* The **Team(s)** column lists the teams of which the users displayed are currently members.



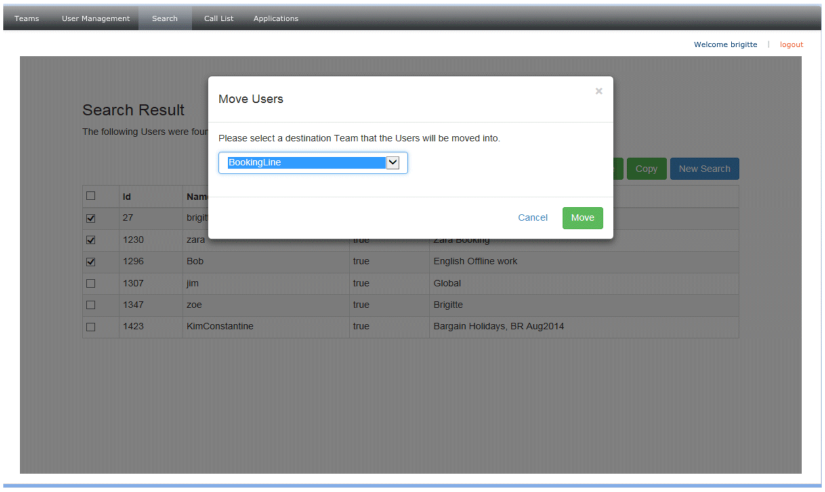
For idetails about assigning users to the required teams, please see the next page.

Assigning Users to Teams

Any user displayed in the Search Result dialog can now be moved or copied to the appropriate team.

To move users out of their current team(s) into a selected team

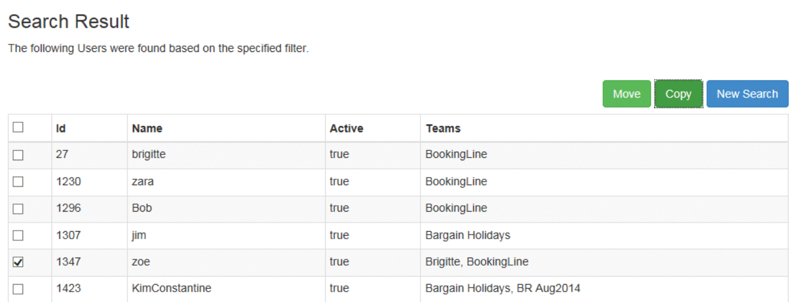
- Tick the checkbox next to the user(s) that you wish to move.
- Click the **Move** button at the top of the grid.
- In the ***Move User*** page, select the target team from the drop down list.
- Click the **Move** button at the bottom right of the dialog, to re-assign the agent to the selected team, or **Cancel** the action.



To copy users to a another team, in addition to their current team(s)

- Tick the checkbox next to the user(s) that you wish to copy.
- Click the **Copy** button at the top of the grid, to open the ***Copy User*** page.
- Select the target team from the drop down list and click **Copy** to add the agent to the selected team, or **Cancel,** to cancel the action**.**

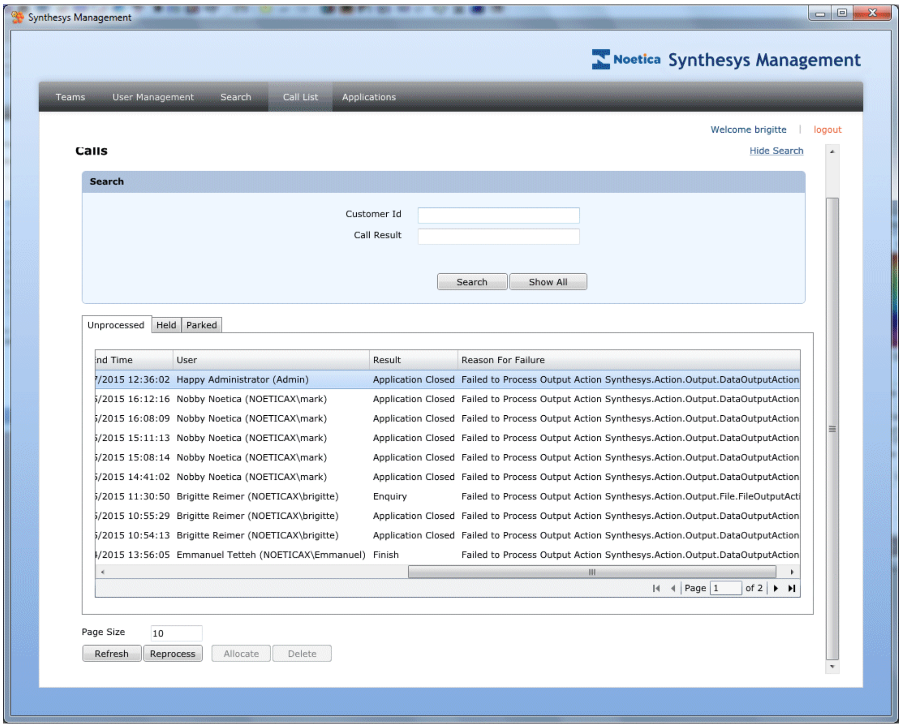
The Search Result grid will update, listing the team(s) in which the users are now represented.



☐	Id	Name	Active	Teams
☐	27	brigitte	true	BookingLine
☐	1230	zara	true	BookingLine
☐	1296	Bob	true	BookingLine
☐	1307	jim	true	Bargain Holidays
☑	1347	zoe	true	Brigitte, BookingLine
☐	1423	KimConstantine	true	Bargain Holidays, BR Aug2014

Call List

Viewing and managing Unprocessed, Held & Parked Calls



CALL LIST

The Call List option in Synthesys Management enables users to view and manage *Unprocessed, Held* and *Parked* calls.

To view Call Lists

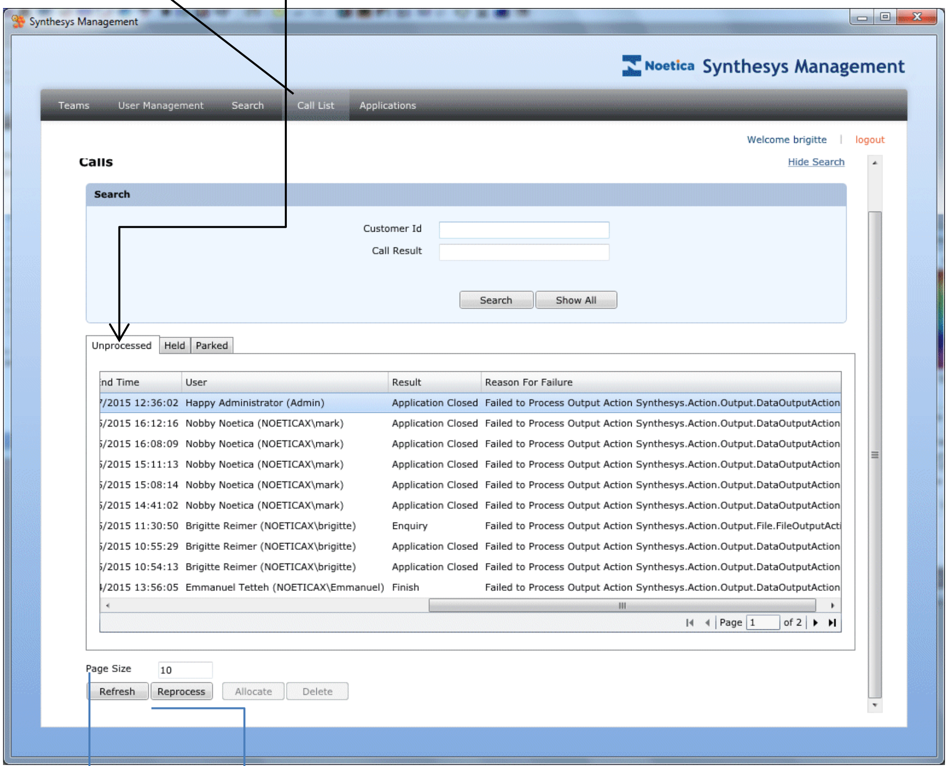
- Open Synthesys Management by clicking on the *Synthesys Workspace Management* icon on your desktop.
- Select the **Call List** tab.

*The **Call List** page will open, displaying three tabs, **Unprocessed, Held** and **Parked,** to allow users to view a list of unprocessed, held and parked calls.*

Call List tab, to open the *Call List* pages

Unprocessed, Held and ***Parked*** tabs show *unprocessed, held* and *parked* calls.

Search/ Hide Search to show/ hide search option for unprocessed *calls*

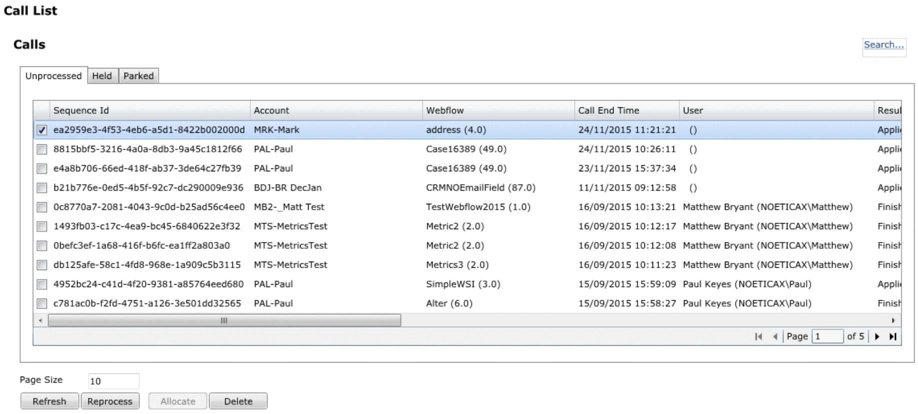


Page size: Enter the number of items displayed

Refresh/ Reprocess/ Allocate & Delete options to update, process, allocate or delete selected items.

Viewing List of Unprocessed Calls

The *Call List* dialog will initially show a list of *unprocessed* calls.

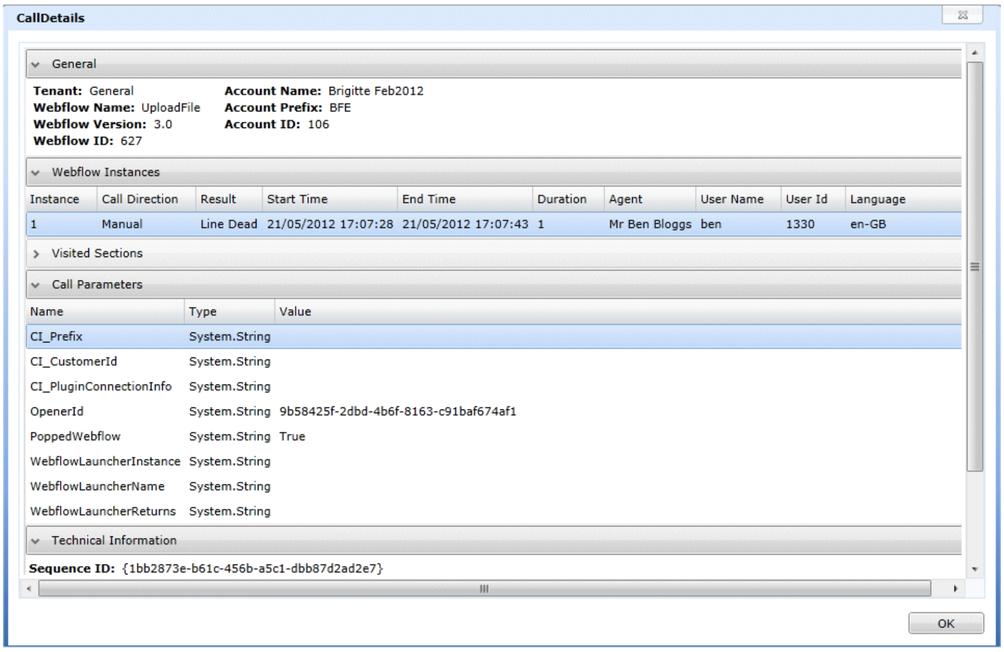


View specific pages by entering the page number, or by moving through the pages using the back or forward arrows.

Use the ***Page Size*** field to enter the number of items displayed on a page.

Viewing Details of Unprocessed Calls

- To display further details of a specific unprocessed call, double click the left mouse button on the desired call.

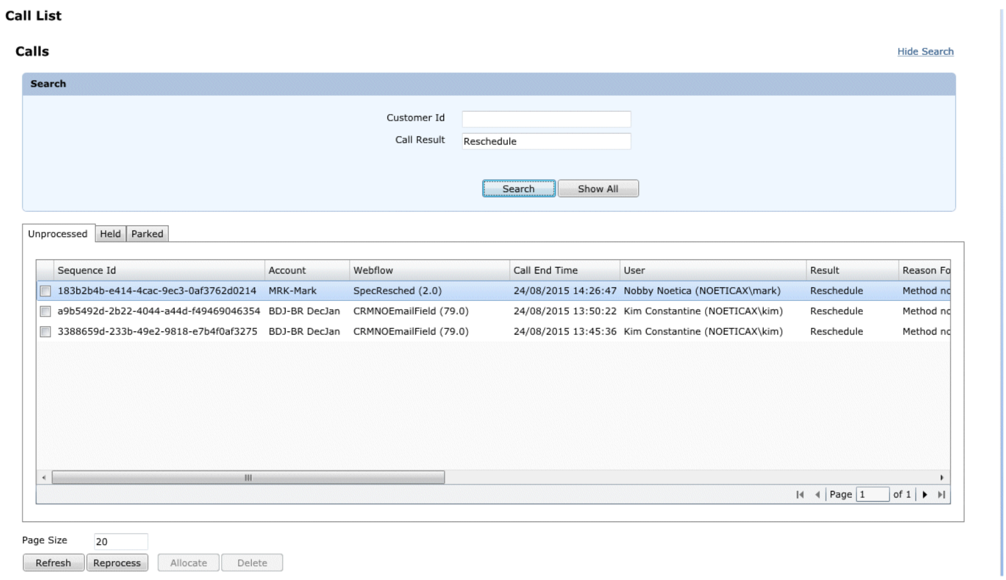


Search Filter for Unprocessed Calls

The **Search / Hide Search** link at the top right of the Call List screen in Synthesys Management, allows users to view or hide the search panel with Customer ID and Call Result text boxes, and Search and Show All buttons.

To search for specific unprocessed calls you can use the Customer ID and or Call Result fields:

- If known, enter the customer ID into the ***Customer ID*** field.
- Enter the call outcome, as displayed in the *Results* column, into the ***Call Result*** field.
- Click the **Search** button, to display the calls that match your search criteria.



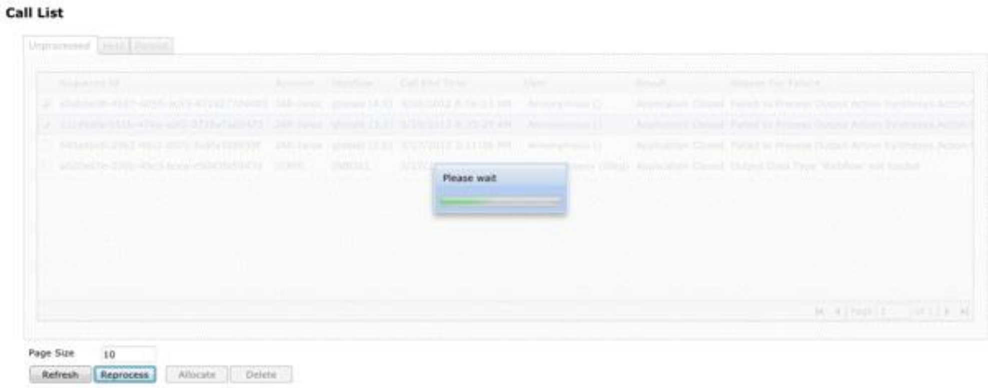
- Click the **Show All** button, to display all unprocessed calls for the selected page.

Processing Unprocessed Calls

In some instances it may be possible to simply re-run an unprocessed call, for example if it failed to process because of a *Timeout*, or because the connection to the database was interrupted.

To process an unprocessed call:

- Select the call(s) that you wish to process by clicking your left mouse button into the check box next to the call.
- Next, click the **Reprocess** button at the bottom of the Call List screen.



- Click the **Refresh** button, to update the list of *unprocessed* calls displayed.

If the call still fails to process, you need to contact you Systems Administrator.

Deleting Unprocessed Calls

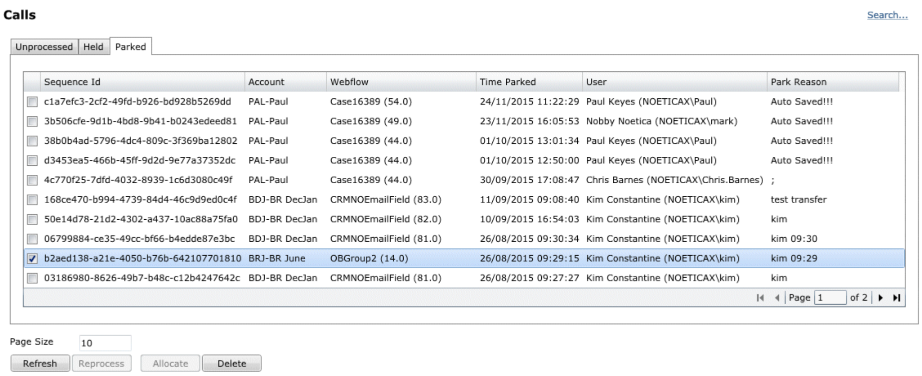
It is possible to select and delete unprocessed calls, held and parked calls however can't be deleted:

- Select the unprocessed call(s) that you wish to delete by clicking your left mouse button into the check box next to the call.
- Click the **Delete** button at the bottom left of the Call List screen, to delete the selected items.

Viewing List of Held & Parked Calls

To display a list of parked or held calls

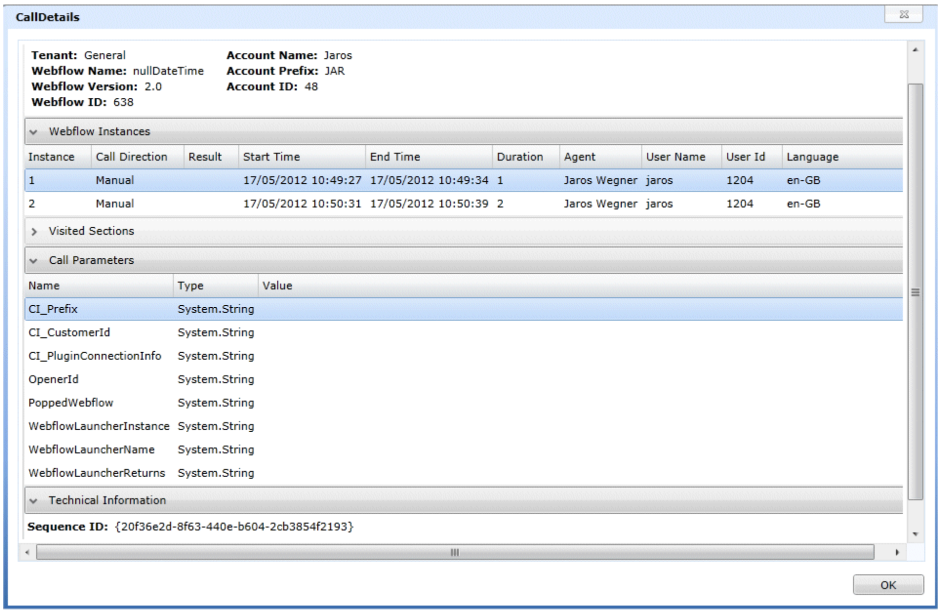
- Click on either the *Parked* or *Held* tab in the *Call List* dialog.



Specific pages can be viewed entering the page number, or by moving through the pages using the back or forward arrows.

View Details of Parked/ Held Calls

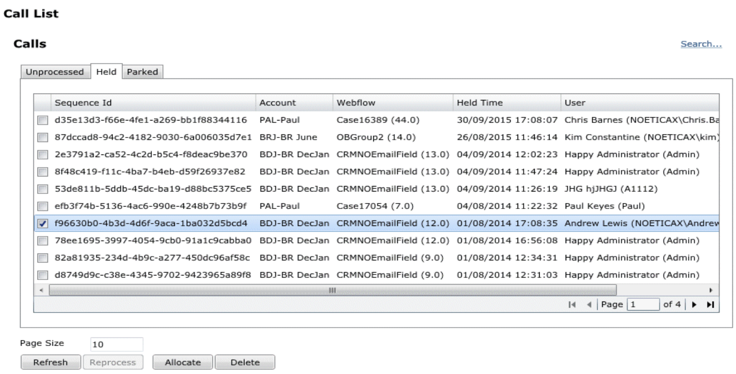
- To display further details regarding held or parked calls, click the left mouse button on the desired call(s).



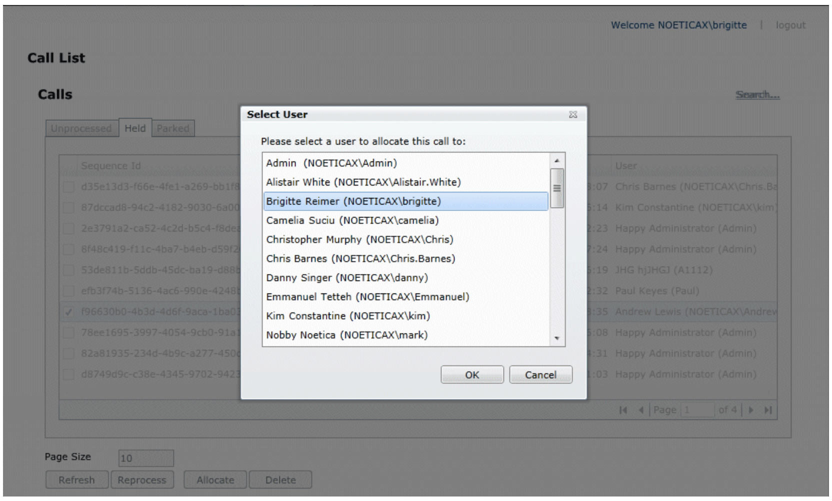
Allocating Held Calls

To assign a held call to a specific user

- Select the held call that you wish to allocate, by clicking your left mouse button into the check box next to the call.



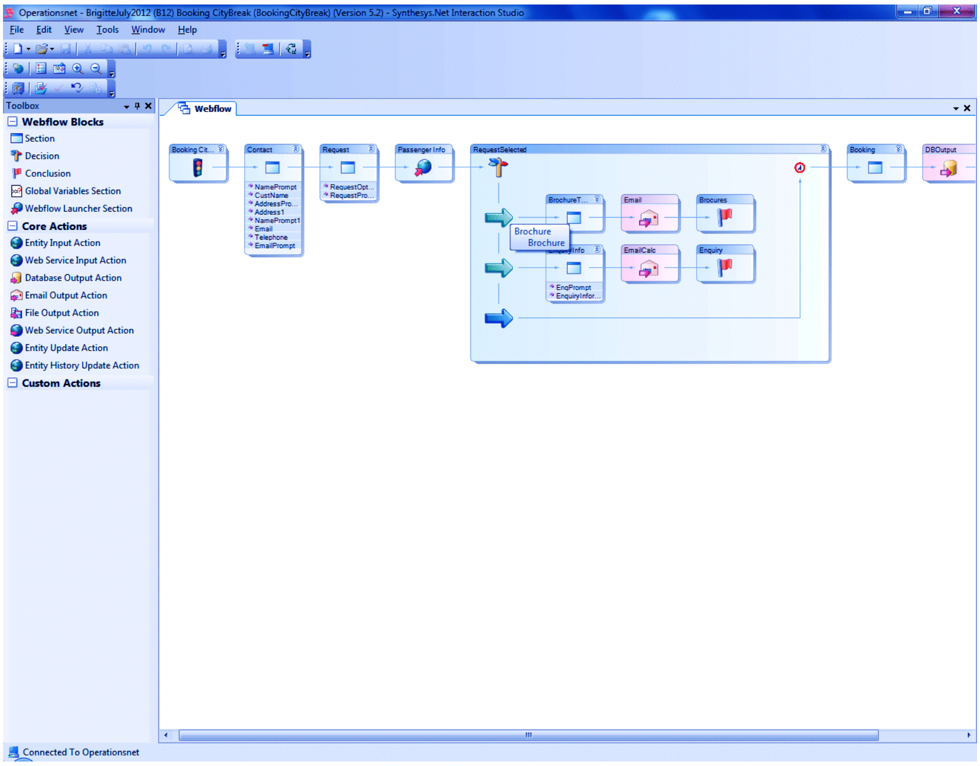
- Click the **Allocate** button at the bottom left of the Call List screen.
- Select the user to whom you wish to allocate the call.



The allocated call will be displayed in the ***Held calls*** Web part in the Synthesys.Net Portal.

SYNTHESYS

INTERACTION STUDIO



SYNTHESYS INTERACTION STUDIO

Introduction

Websites are increasingly used as a point of contact between an organisation and its customers.

The Synthesys Interaction Studio allows developers to produce interactive, personalised campaigns with complex functionality for the web. Web designers, developers and even non-technical people can create Webflows in just days using the Synthesys Interaction Studio, a simple graphical user interface.

A Webflow is a map of all the routes an interaction can take, from a simple transaction, to complex interactions that are personalised. The Webflow guides agents and users through the different routes and through the sections of the form that they see on that route. The information gained is readily reusable for business purposes because it is stored in a database.

Applications of Synthesys are broad and ideal for Websites with any requirement for interaction with customers. This can range from travel sites, to Insurance companies providing quotations and policy renewal online and online e-government forms, such as passport and housing applications.

SYNTHESYS INTERACTION STUDIO

SYNTHESYS

INTERACTION STUDIO

Starting the Synthesys Interaction Studio

The Menu Bar & Toolbars

Connecting to the Server

Creating a new Server

Synchronising with the Server

STARTING THE INTERACTION STUDIO

Once installed, open the Synthesys Interaction Studio clicking on the Synthesys IDE icon  on your desktop.

The following screen is presented:

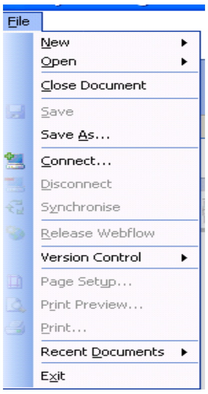
Menu Bar   Standard Toolbar   Connectivity Toolbar

The following section describes in detail the elements indicated above.

THE MENU BAR

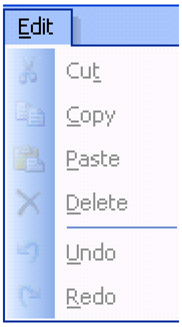
The menu bar at the top of the *Synthesys* Interaction Studio *Screen* provides access to a series of menu options via pull down menus:

File Pull Down Menu



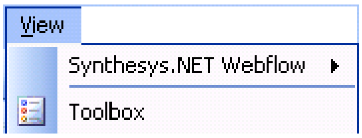
Menu Option	Used To
New	Create a new Synthesys Webflow.
Open	Open an existing Webflow.
Close Document	Close the currently displayed Webflow.
Save	Save the currently displayed Webflow.
Save As	Save the currently displayed Webflow on a different server and/ or under a different account.
Connect	Connect the local client machine to the server.
Disconnect	Disconnect the local client machine from the server.
Synchronise	Synchronising the local client with the server to pick up the latest published Webflows and updates of Web controls.
Publish Webflow	Publish the currently displayed Webflow to make the latest version available in the Synthesys Portal in the Web Browser.
Version Control	Allow the rollback to a previous or older Version of the Webflow, and to check Webflows in and out.
Page Setup	Display the standard Windows *Printer Set-up* window.
Print Preview	Preview how the Webflow displayed will look when it is printed.
Print	Print the currently displayed Webflow.
Recent Documents	Select a previously opened file.
Exit	Close the Synthesys Interaction Studio screen.

Edit Pull Down Menu



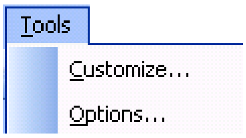
Menu Option	Used To
Cut	Remove the currently highlighted selection and place it on the Windows clipboard.
Copy	Copy the currently highlighted selection and place it on the Windows clipboard.
Paste	Paste the contents of the Windows clipboard at the cursor/ insertion point.
Delete	Delete the currently highlighted selection.
Undo	Undo the last action that was performed on the system.
Redo	Redo the last action that was performed on the system.

View Pull Down Menu



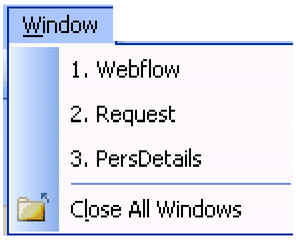
Menu Option	Used To
Synthesys Webflow	
Calculations	Display calculations used in the current Webflow.
Controls used	Display the Web controls used in the current Webflow.
Properties used	Display any properties, for example branching, associated with the current Webflow.
Webflow Item List	Display the number of sections, conclusions, decisions images and Input & Output actions used in the currently opened Webflow, together with associated details.
Webflow	Display the Webflow
Webflow Properties	Display the Properties of the currently opened webflow, including Webflow Name, Help URL and Parameters used, the History showing published versions, Encryption status, Abort Reasons, Dashboard and Parked & Held information as configured for the webflow and Default Styles used in the current webflow. Please see the section ***Webflow Property Options*** for more information.
Toolbox	Restore the Toolbox, if it has been closed down. In the Webflow design view, the Toolbox displays the available Webflow Blocks. In the Section view, the Toolbox displays the Core Controls and Custom Controls available.

Tools Pull Down Menu



Menu Option	Used To
Customize	Create and configure toolbars as required.
Options	***Environment:*** To configure the layout of the Synthesys Interaction Studio environment (i.e. tabbed or windowed). ***Webflows:*** To browse for the webflow path ***Servers:*** To add or delete servers.

Window Pull Down Menu



Menu Option	Used To
1. Webflow 2. Request 3.PersDetails	Show the section tabs displayed in the Webflow design area.
Close All Windows	Close down all open windows currently displayed in the Webflow design area.

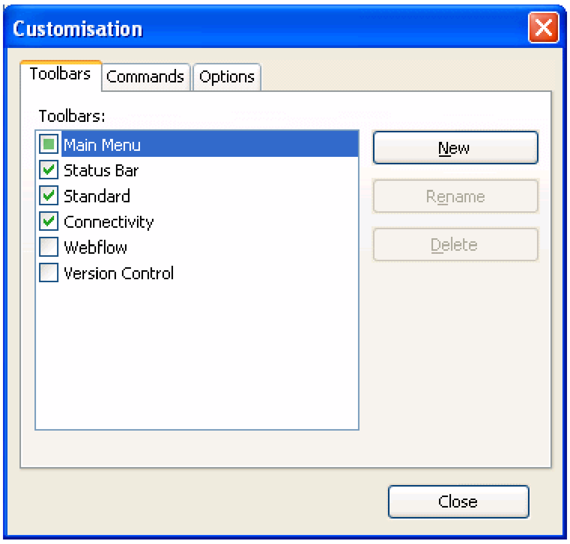
Help Pull Down Menu

Menu Option	Used To
About	Display details about the Synthesys Interaction Studio.

TOOLBARS

The **Standard** and **Connectivity** toolbars are automatically displayed on opening the Synthesys Interaction Studio screen.

The ***Webflow*** and ***Version Control*** toolbars can be added to the Synthesys Interaction Studio screen via **Tools /Customise,** by placing a tick in the check box next to the toolbar name.



How to create your own personalized toolbars is described in the section 'Creating your own Toolbars'.

The toolbars can be placed anywhere in the Synthesys Interaction Studio Screen. They can also be positioned at the top, bottom, or to the left or right of the Webflow design area.

Displaying all existing toolbars, many of the operations will be available via the toolbar, rather than the file menu.

The Standard Toolbar

The Standard Toolbar is positioned directly below the Menu Bar in the Synthesys Interaction Studio screen.

Button	Used To
	Create a new Synthesys Webflow.
	Display the *Open Webflow* window, where you can open an existing Webflow.
	Save the currently displayed Webflow. Webflows are automatically saved to the central server using a fixed format file name. The file name is generated using the account prefix and the name of the Webflow.
	Remove the currently highlighted selection and place it on the Windows clipboard.
	Copy the currently highlighted selection to the Windows clipboard.
	Paste the contents of the Windows clipboard at the cursor/ insertion point.
	Undo the last action that was performed on the system.
	Redo the last action that was performed on the system.
	Preview how the currently displayed Webflow will look when it is printed.
	Display the *Print* window for your default Windows printer.

Connectivity Toolbar

Button	Used To
	Connect the local client machine to the remote server.
	Disconnect the local client machine from the remote server.
	Synchronies the local client machine with the remote server, picking up the latest Webflows and any updates to Web controls.

Further available Toolbars

Webflow Toolbar

Button	**Used To**
	Publish the currently displayed Webflow to make the latest version available in the Synthesys Portal in the Web Browser.
	Display the properties of the currently open Webflow.
	Zoom in / out of the currently open Webflow.
	Display the *Print* window for your default Windows printer.

Version Control Toolbar

Button	**Used To**
	Open the Select Version Control dialog.
	Check in a Webflow. To be able to publish a Webflow, the Webflow has to be checked in.
	Check out a Webflow. To be able to work with and edit a Webflow, you need to check it out.
	Undo Check out.
	Get the latest Version of the Webflow.

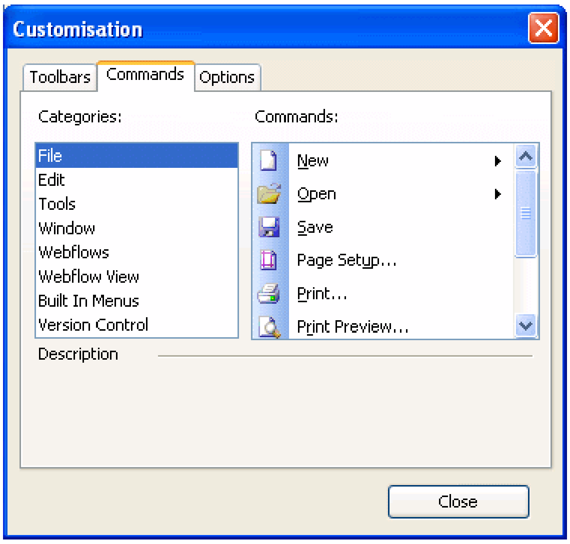
Creating your own Toolbars

You can also create and configure your own toolbars as required.

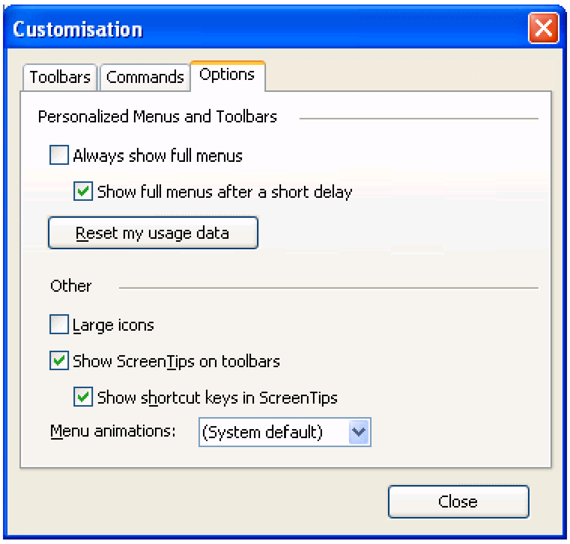
Go to **Tools /Customise** and click the **New** button in the Customization window. Enter a name for your toolbar and click **Close** to display the new toolbar.

Next, go to **Tools /Customise** again**,** but this time, click the '**Commands**' tab in the Customization window.

Select and drag the required icons onto your toolbar.



Further options to personalize your toolbar are available via the '**Options**' tab.

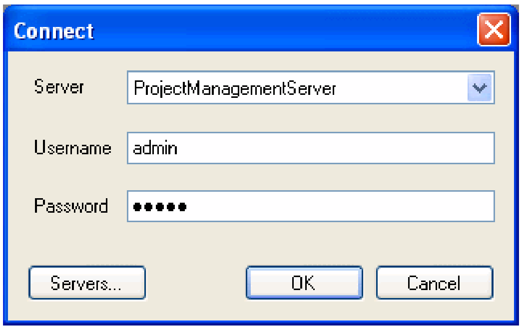


CONNECTING TO A SERVER

You can now choose to design your Webflow off line, and only connect to the server to publish your Webflow before taking a call in the Webflow browser, or you can connect to the server immediately.

To connect the Interaction Studio to a Synthesys server, go to File / Connect.

This will open the *Connect* dialog.

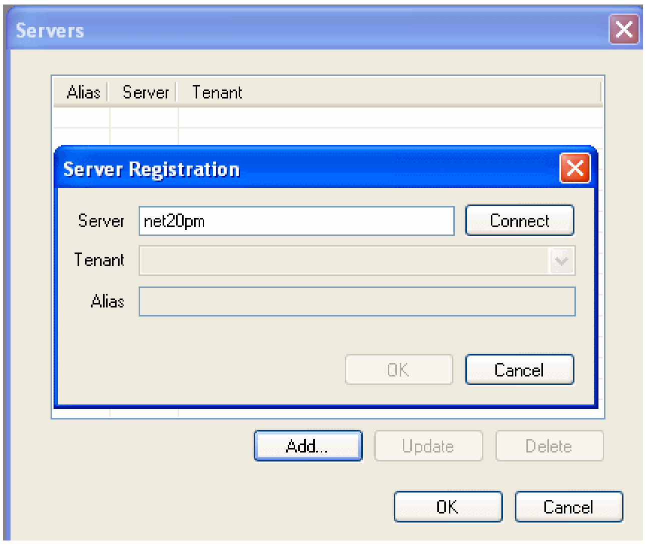


Select the required server from the drop down menu**.**

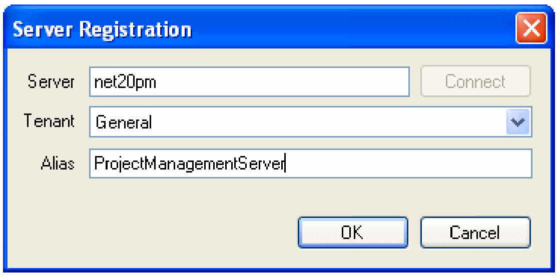
Enter your **user name** and **password** in the Username and Password fields displayed.

Creating a new Server

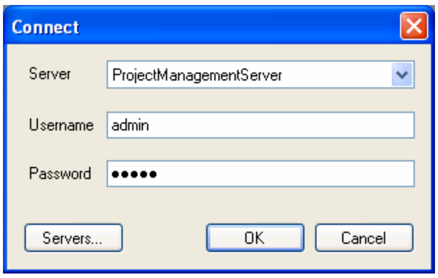
To create a new server, go to File / Connect, select Servers in the *Connect* window and click the Add button.



Enter the name of the server and select Connect. Once connected select tenant “General” and then give the server an appropriate name that you can remember.



Select OK and connect to the server by entering your username and password as given to you by your administrator.

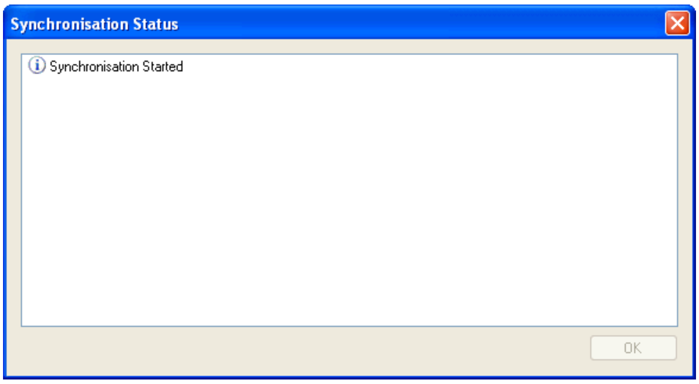


Synchronising with the Server

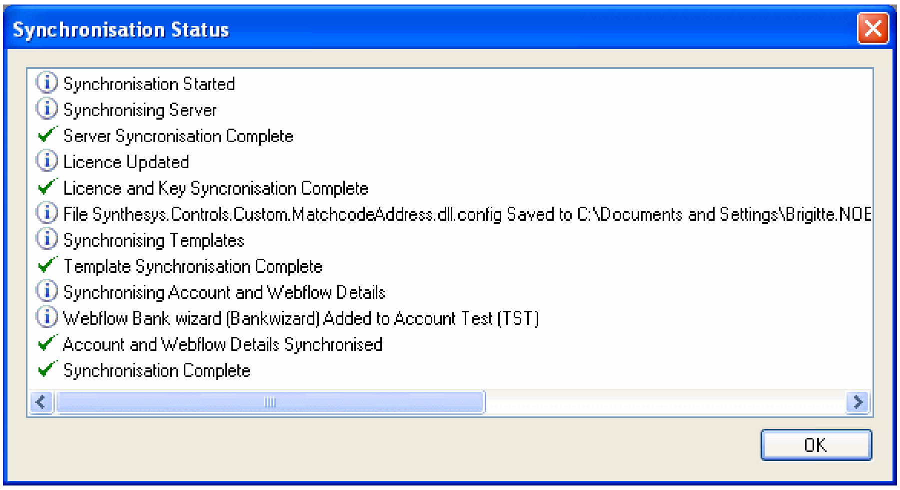
Once you have connected to the server, you need to synchronize the client machine with the server, to pick up the latest Webflows and any updates to Web controls.

Go to **File / Synchronise**, or alternatively click the Synchronize  icon.

Initially, the **'Synchronisation Started'** line will appear.

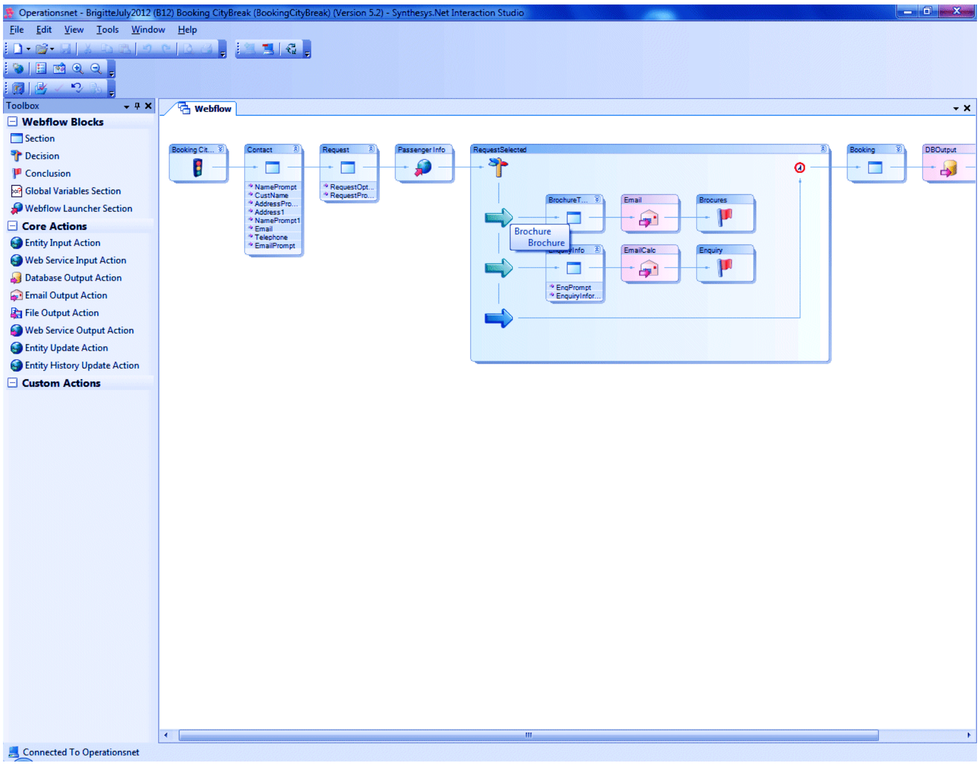


After a short while further lines appear, with the last line reading '**Synchronisation Complete'.**



Click OK to exit the *Synchronisation Status* screen.

DESIGNING SYNTHESYS WEBFLOWS

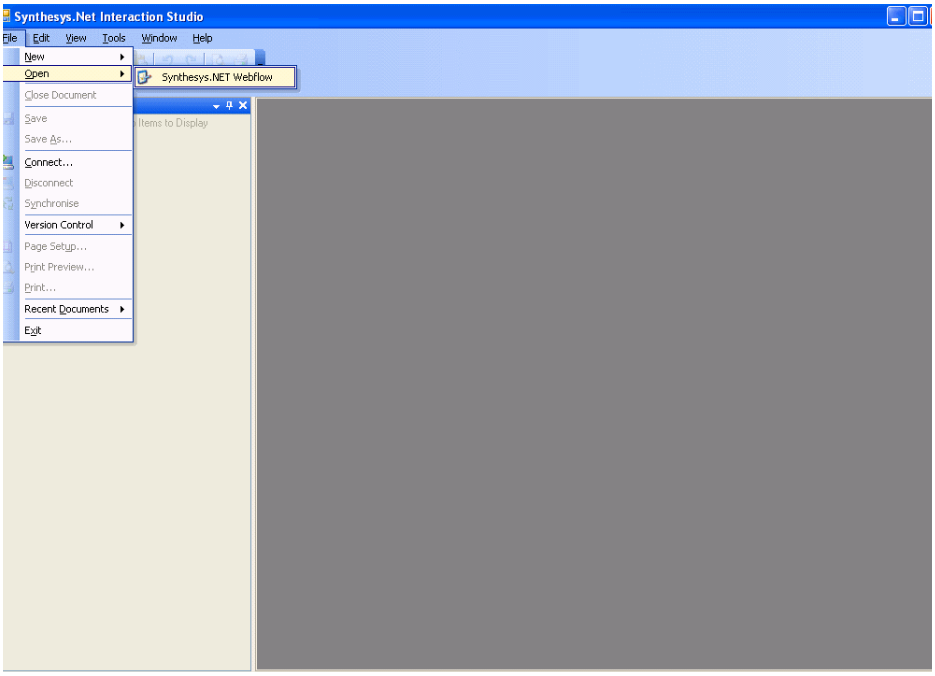


OPENING EXISTING WEBFLOWS

In the Synthesys Interaction Studio window, you can select an existing Webflow, or you can create a new Synthesys Webflow.

To open an existing Synthesys Webflow, go to:

File / Open / Synthesys Webflow.

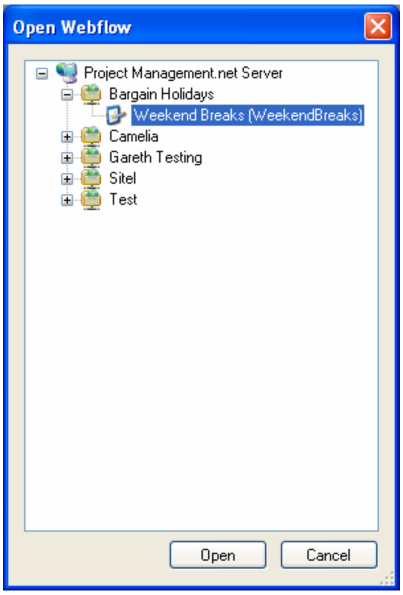


Understanding The Open Webflow Screen

The Open Webflow screen shows a tree structure, similar to the one in your Windows Explorer and graphically represents the customer accounts and campaigns that are stored within the system.

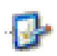
A Synthesys Webflow is created for each campaign that you are managing and is stored under the appropriate customer account.

The *Open* Webflow window, where all Synthesys Webflows are held



 **Server**. The name of the Server is shown to the right of the icon. A ⊞ sign next to the server icon indicates that one or more accounts have been created for that server. Click on ⊞ to display the accounts.

 **Customer account**. Each account set up on the system is displayed. A ⊞ sign next to the account icon indicates that one or more Webflows have been created for that customer. Click on ⊞ to display the Webflows.

 **A Campaign,** for which a Synthesys Webflow has been designed, is displayed under the appropriate customer account.

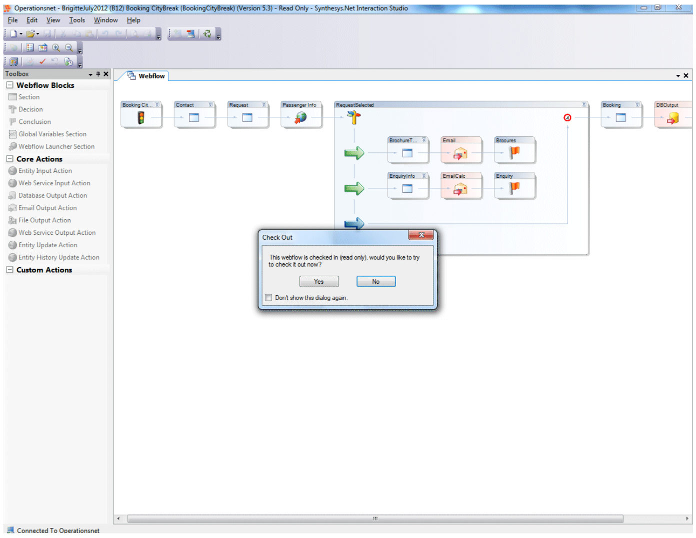
Checking Out Webflows

Synthesys Webflows can be opened in a ‘view only’ mode or they can be checked out for editing.

When opening a Webflow that has previously been published or checked in, the *Check Out* dialog will open, asking users if they wish to check out the webflow:

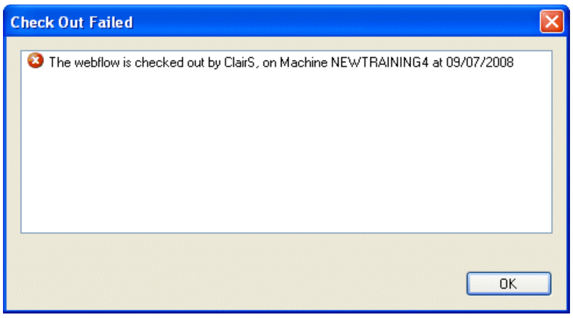
‘This Webflow is checked in (read only), would you like to try to check it out now?’

- Click **Yes** to check out the Webflow so that you can edit it
- Click **No** if you only wish to view the Webflow in read only mode



If the Webflow that you wish to edit is already checked out on another machine, the check out will fail.

The message associated with the failed check out shows the name of the user and of the machine on which the Webflow is currently checked out, and the date it was checked out.

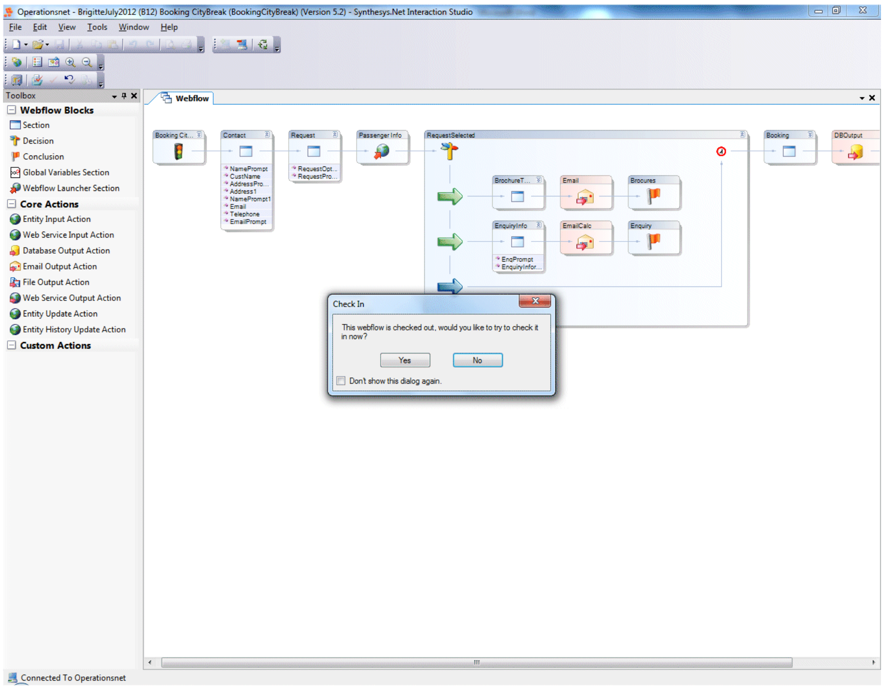


The Webflow needs to be checked in by the listed user, on the named machine, before you can check it out for editing.

Checking In Webflows

On closing a Synthesys Webflow or on exiting the Synthesys Interaction Studio, users will be asked, if they wish to check in the Webflow:

'The webflow is checked out, would you like to check it in?



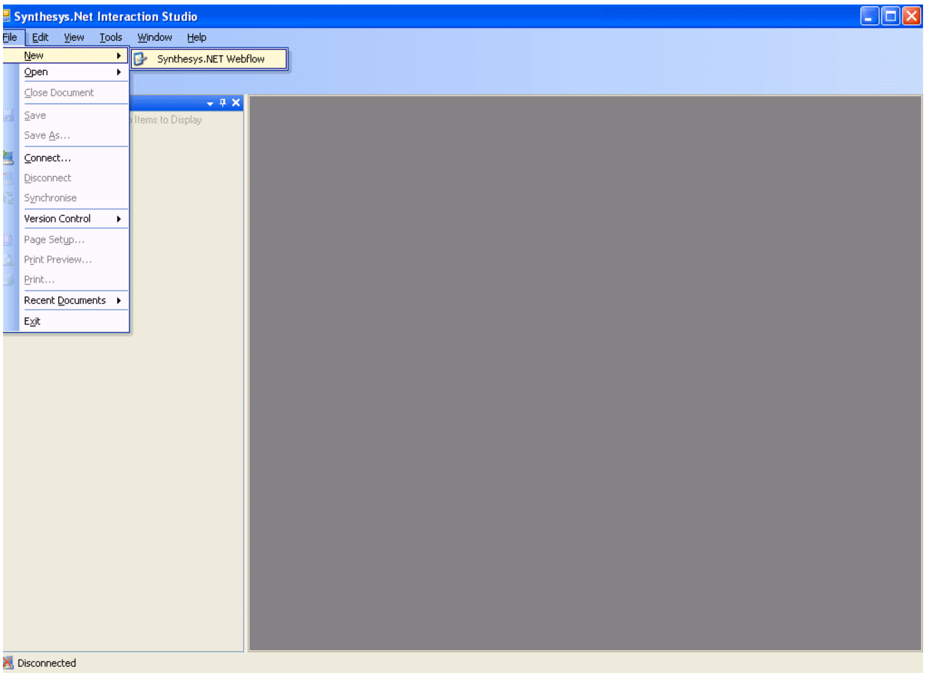
It is advisable to click **Yes** and check the webflow in to ensure that it can be checked out again for editing, on the current machine by other users or on another machine.

Remember that users can only check out, edit and publish Webflows that are not currently checked out on another machine or by another user.

CREATING NEW WEBFLOWS

To create a new Synthesys Webflow, go to:

File / New / Synthesys Webflow

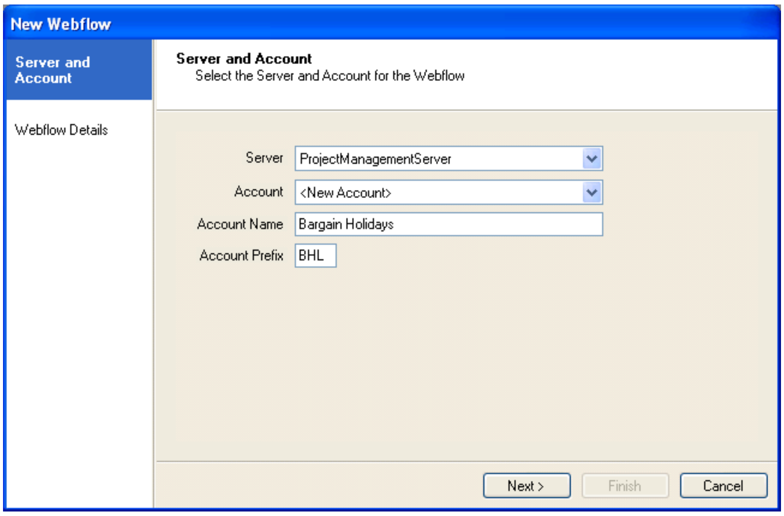


Setting Up A New Account

You can choose to create a Synthesys Webflow for an existing account or a new account.

To create a new *Synthesys Webflow* under an existing account, use the respective drop down menus, to select the name of the server and the account, before moving to the next window.

To set up a new account, select the Server name und <New Account>.



Entering Account Details

On selecting the **<New Account>** option, an *Account Name* and *Account Prefix* field will be displayed.

- Enter a **name** for the new account and an **account prefix** in the respective fields.

The Prefix that you enter must be unique and must contain three alphanumeric characters.

The Prefix is used to identify all data held against the account and allows easy identification of data held in database tables.

Click **Next>** to move to the *New Webflow* window, where you can enter a name for your new campaign.

Setting up a new Campaign

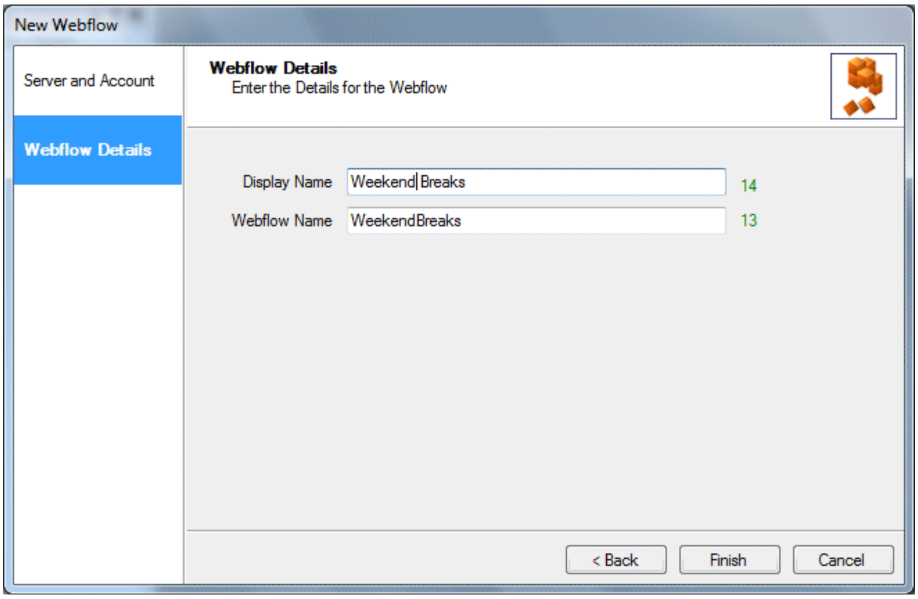
In the New Webflow window

- **Enter** a **descriptive name** for your Synthesys Webflow in the **Display Name field**.

The display name should represent the campaign it is designed to support.

You can enter up to a maximum of 255 characters into the Display Name field. The entry in the *Webflow Name* field, which is stored in the database, is restricted to 40 characters.

In our example, we have called the Webflow ‘Weekend Breaks'.



Click **Finish** to display the Webflow design area, within the Synthesys Interaction Studio screen.

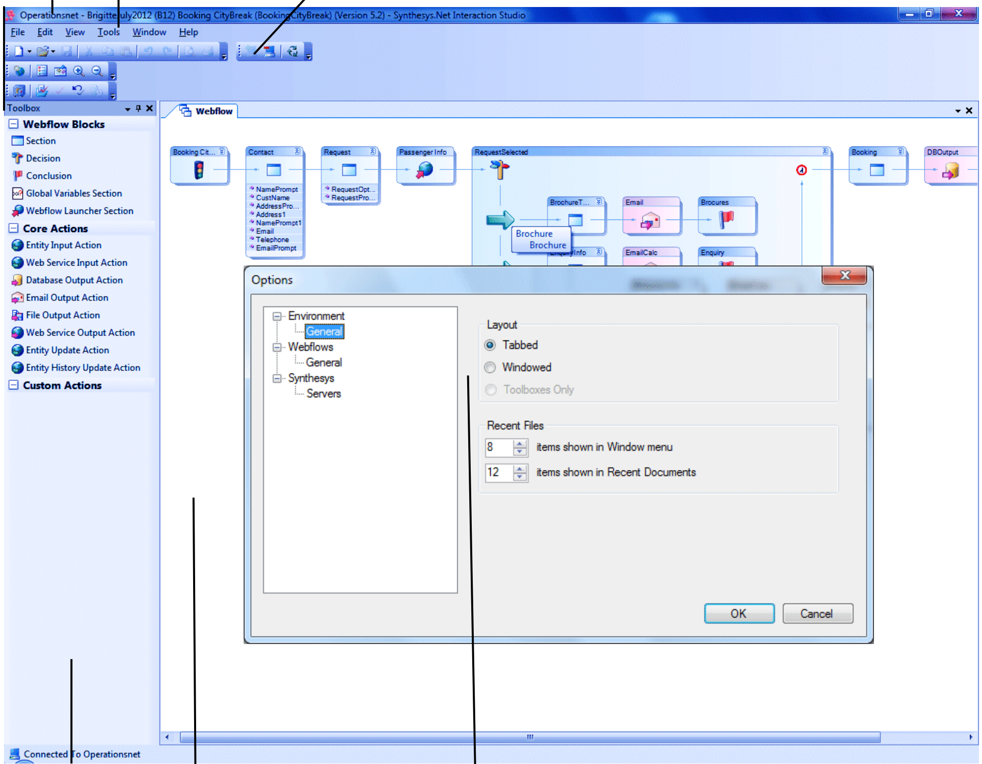
UNDERSTANDING THE WEBFLOW SCREEN

The top of the Synthesys Interaction Studio window now displays the account and Webflow details, together with the version number.

The Webflow design area contains two sections. The first section displays a traffic light to indicate the start of the Webflow; the other a Finish flag, to signal the end.

Account & Campaign Details

Menu Bar   Toolbars as selected and configured



Webflow Blocks & Core Actions   Webflow Layout: Tabbed Environment

Webflow Design Arera

To display tab headings in the Webflow design area, go to Tools – Options. In the *Options* dialog, under the Environment directory, select General and click *Tabbed* in the Layout section on the right.

To display the toolbox, go to *View* on the menu bar and select – *Toolbox.*

Webflow Blocks & Core Actions

The individual Webflow Blocks and Core Actions are used to build Webflows quickly and easily. The following standard Features are available:

Webflow Blocks	Used To
Section	Add a new section to the current Webflow and add the questions to be asked when the Webflow is running in a web browser.
Decision	Add a new decision to the Webflow, to allow the Webflow to react to questions in different ways and to determine the path through a Webflow.
Conclusion	Add a new conclusion point to a particular area to end the Webflow.
Global Variables Section	Allow users to set and/or create global variables and decide its type, i.e. integer, double, character, string, datetime, boolean & listitemcollection.
Webflow Launcher Section	Allow users to launch webflows within a webflow and pass parameters between the webflows.

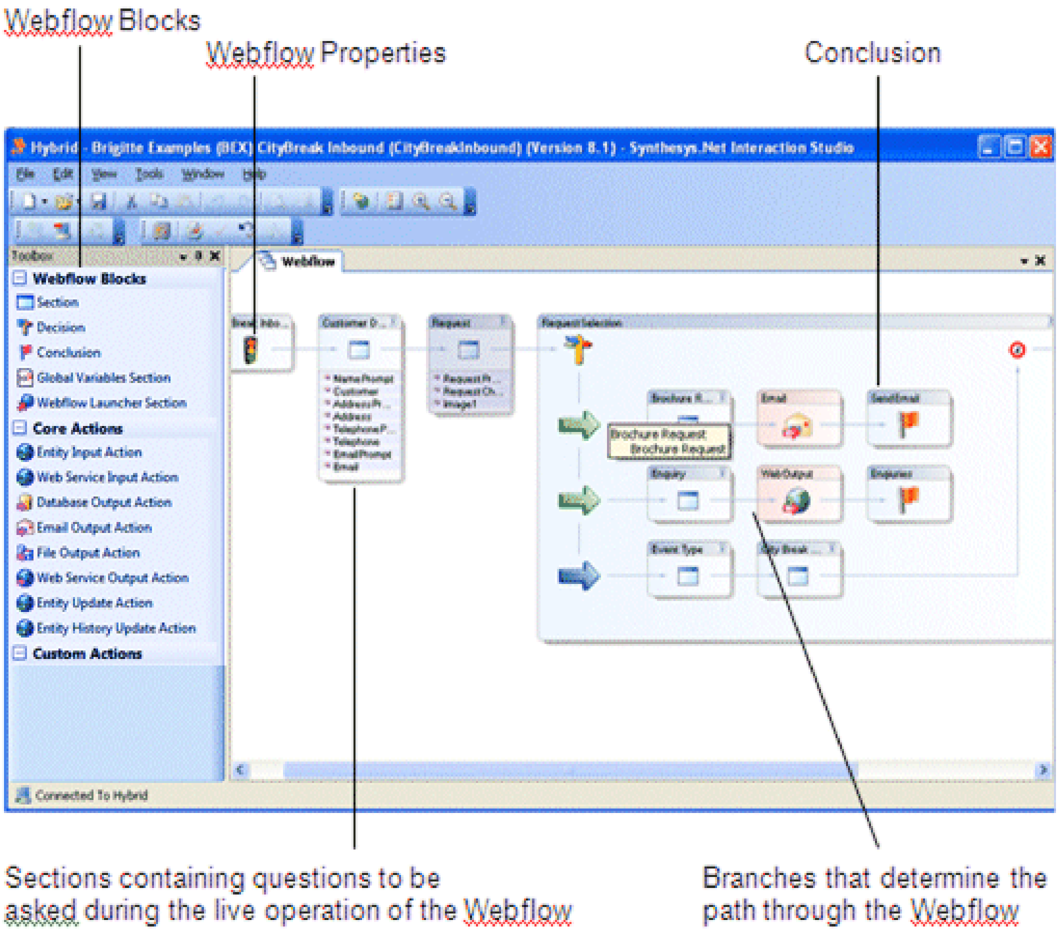
Core Actions	Used To
Entity Input Action	Utilize specific CRM/ Entity details within a webflow, for example to enable branching, in calculations or the dashboard.
Web Service Input Action	Enable connection to a web service to return data for use in a Synthesys Webflow at runtime.
Database Output Action	Allow data from a Web call to be exported to a selected Database.
Email Output Action	Enable users to send an instant email as part of the Webflow.
File Output Action	Export data from a Web call as a comma separated file.
Web Service Output Action	Enable connection to a web service to export data from a Synthesys Webflow at runtime.
Entity Update Action	Allows data to be written back to the Entity table.
Entity History Update Action	Allows data to be written back to the History table.

Designing a Synthesys. Net Webflow

The Webflow design area displays a section with the Webflow name, to mark the starting point of your Synthesys Webflow and another with a Finish flag, signalling the end.

To build a Webflow, and to develop the paths that can be taken, drag the sections and decisions from the Webflow Blocks column and place them between the traffic light and the finish flag.

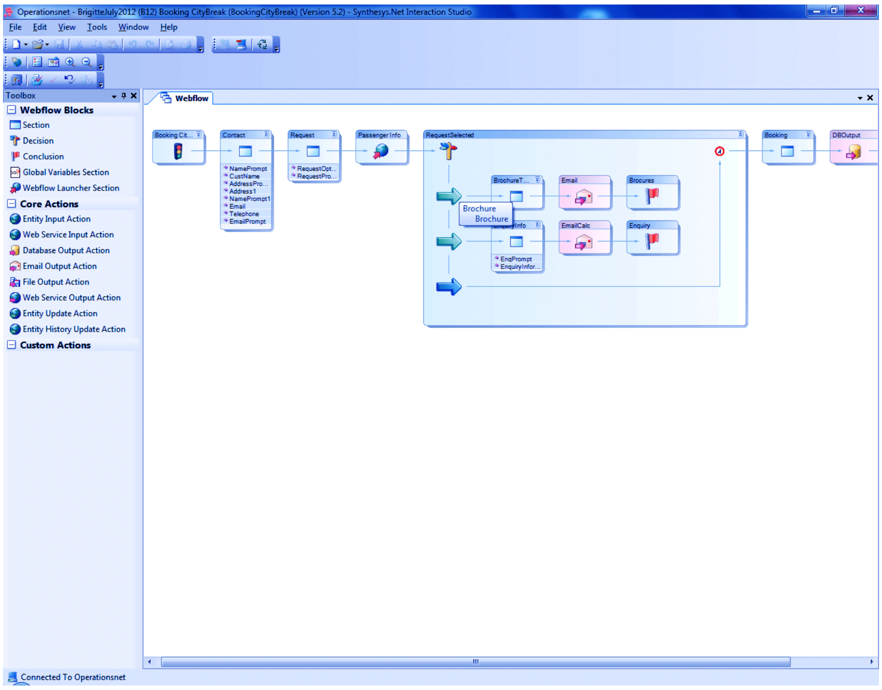
The Webflow in our example contains sections, decisions with branches, conclusion points and some output actions.



Section Content

To view a summary of the section content, click the icon at the top left of the section. A drop down list displays the names of the web controls that have been placed into the section.

To open a section, click on the corresponding section tab displayed in Webflow Flow View, or double click on the section itself.



Display Branches

Click the icon at the top right of the decision point, to expand or collapse the branches of a Webflow.

To view the names of individual branches, move your cursor over the branch arrow. A tooltip will appear, showing the branch name.

Working with a Section

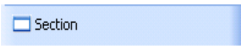
Sections contain the questions that are displayed when the Webflow is running in a web browser. A section will contain all of the necessary web controls to enable the user to perform the task required on the page.

A Section Wizard will guide you through the steps of setting up the section.

Initially, you will be prompted to enter a name for the section. Next, you can choose to add a Help Page to the section clicking Next>, or to drop the section without adding a Help Page, clicking Finish.

To save your Webflow, click the **Save** icon.

Adding a New Section to your Webflow

To add a new section, select the section 

symbol from the *Webflow Blocks* column of the Toolbox, on the left hand side.

- Press the left mouse button and drag the new section into the Webflow design area on the right. Your mouse pointer will change to a small black arrow.
- Point the arrow to the line between the traffic lights and the conclusion flag and release the left mouse button, to drop the section.

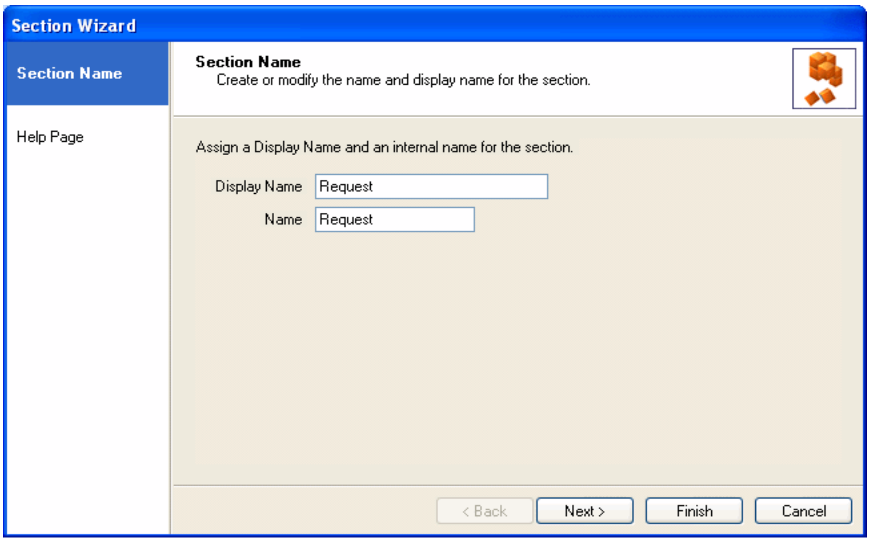
The **Section Wizard** is displayed, prompting you to enter a name for the section.

Descriptive section names help users to navigate through the webflow.

*The **Display Name** is shown as section heading in the webflow. The **internal name** in the **Name** field is stored in the database and can't contain spaces.*

The display name and internal name can be different. The maximum entry for each field is 50 characters.

It is not advisable to rename the internal name in the Name field, especially once your campaign is live, as this will put new columns into the Database and your reports will have to be re-created to point to the new fields.



The ***Section Name*** in our example is 'Request'.

To attach a Help Page to a section click the Help Page option, or the **Next>** button.

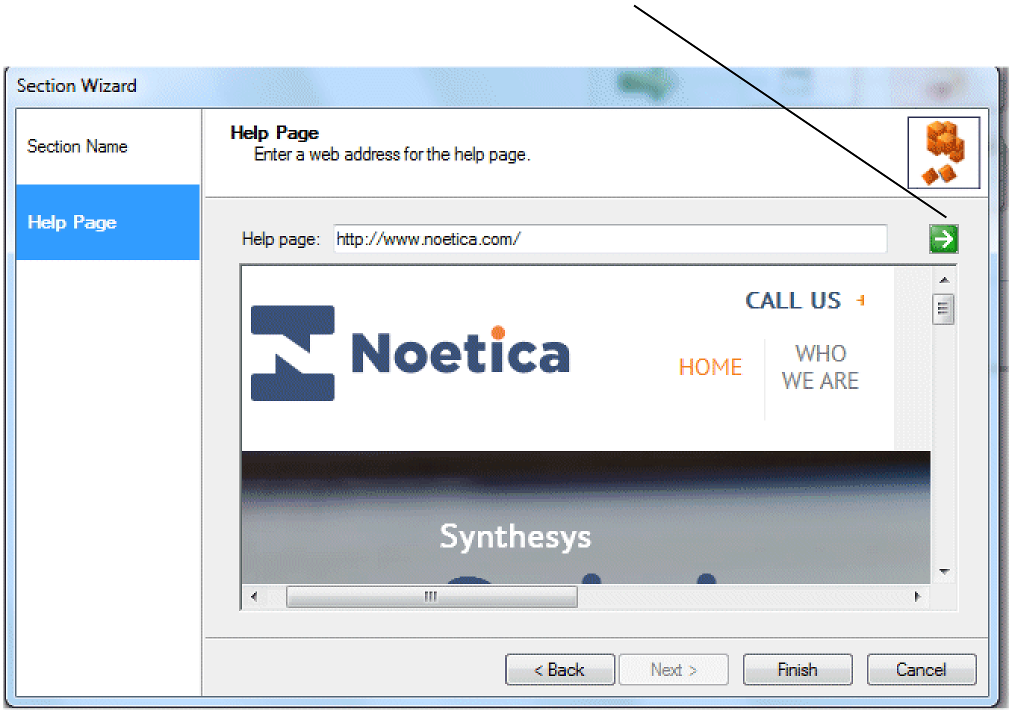
Adding a Help Page to a Section

In the Help Page option of the Section Wizard, you can now assign a Help Page. This can be any page that is accessible via the intranet or the Internet.

Enter the web address for the required Help Page.

Next, press Enter on the keyboard, or click the **green arrow** to **test the link** and to display the Help Page for this section.

Enter the web address and press the arrow to test the link.

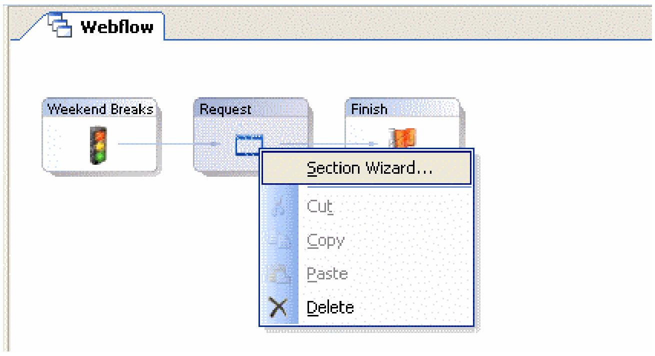


Click **Finish** to add the section to your Webflow.

Editing Section Details

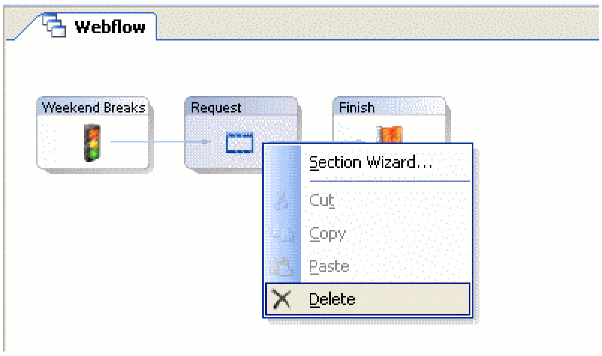
To edit a section, for example to change the section name or to add a Help Page, **right click** on the section and select the **Section Wizard** option.

Changes can now be made, as required, using the section Wizard.



Deleting a Section

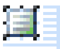
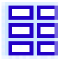
To delete a section, **right click** on the section and select the **Delete** option.

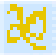
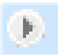


SYNTHESYS WEB CONTROLS

Web controls are used to create the questions and prompts within a section that guide the user through a Webflow, ensuring that all relevant information is completed.

Web controls are self-contained tools that can perform a variety of tasks, from a simple data capture "Edit" control to more advance bespoke Web controls that interact with other applications or databases.

Web control	Used To
	**Address control:** capture postal address details.
	**Check Box:** display a group of Windows style check boxes. Any number of boxes can be created and multiple items can be ticked.
	Cascading Drop Down*:* create up to 10 drop down lists within the control, which allow a mutually exclusive selection to be made from a number of entries.
	Date Time Picker: allow the capture of a past or future date from a diary page, as well as allowing the capture of the time.
	**Drop Down List:** display a Windows style drop down list, which allows a mutually exclusive selection to be made from a number of entries.
	**Edit:** accommodate numerical, currency, text or alphanumeric input.
	**Entity control:** pick up a specific CRM/ Entity table and to determine how the information is displayed to users at run time.
	File Upload: upload files when taking calls in the Synthesys.Net Portal. Using calculations, users can specify which files to upload and the location to store and view the files.
	**Hyperlink:** launch a webpage via a hyperlink in the webflow
	**IFrame:** launch a webpage as part of the webflow, when users reach the section that contains the control.
	**Image:** allow the display of images as part of the webflow.
	**List Box**: display a list.
	**Multi Edit**: display of multiple edit fields in multiple columns and rows that can accommodate numerical, currency, text or alphanumeric input.

Web control	Used To
	**Memo:** allows the entry of large amounts of text with formatting.
	**Multi Memo**: enter large amounts of text with formatting. Users can split the memo control into up to three memo fields displayed next to each other, and define a width for each field. Entries in each memo field will be stored to its own database column.
	**Name:** allows the capture of title, initials, forename and surname.
	**Prompt:** is used to prompt agent dialogue during a call.
	**Radio:** allows a mutually exclusive selection to be made from a number of configurable buttons.
	**Reference Number:** generates a unique reference number at runtime according to a predefined configurable format.
	**Webflow Launcher:** to insert a webflow into another webflow.

Custom Web Controls	Used To
	**EigerDebit:** verifies bank account details given by a customer. The control is integrated with the BANK WIZARD® (Software to be provided by Eiger), to provide reliable bank data for your systems.
	**Matchcode Address** allows the capture of a postal address. Using Matchcode Address , the address will be completed automatically based on the entry of a postcode.
	**Media Code control:** *a*llows the capture of a media source code. Based on a reference number of media name, full source details can be displayed on screen. The control is used primarily for the purpose of market research.

Working with Web Controls

The available Web controls are displayed in the section editor under the **Core Controls** column of the Toolbox.

A Control Wizard will enable you to configure the control as required.

Each Web control has its own set of available properties and the control wizard will systematically guide you to each option, when you click the Next> button.

Available Option	Used to
Name	Enter a name for the control. The name must only contain alpha numeric characters and no spaces.
Settings	Choose and select from the options available, or add to, remove or modify items in a list
Items	Add to, remove or modify items in a list
Value	Enter free text, for example for the prompt control
Fields/ Titles	Select from the available fields and add or remove existing titles for the name control
Validation	Set compulsory fields to instruct the user to complete and put data in the Web control, before moving on to the next section. A star will indicate which fields are set to compulsory.
Advanced	Change the appearance and behaviour of a control, for example set back and border colours or set properties using calculations.

ADDING & CONFIGURING WEB CONTROLS

To add a Web control to a section

- Double click on the section, to open the Section Editor.

The available Web controls are displayed under the **Core Controls** column of the Toolbox on the left hand side.

- Select the desired control symbol, for example a Radio Web control, and drag it into the Section design area.
- Release the left mouse button, to add the control.

All controls will be aligned to the left and one above another. If you put many controls onto a page, the page will have scroll bars at runtime, allowing the user to scroll up and down the page.

Each Web control has a set of available properties. When you click the Next> button, the Control Wizard will systematically guide you to each option.

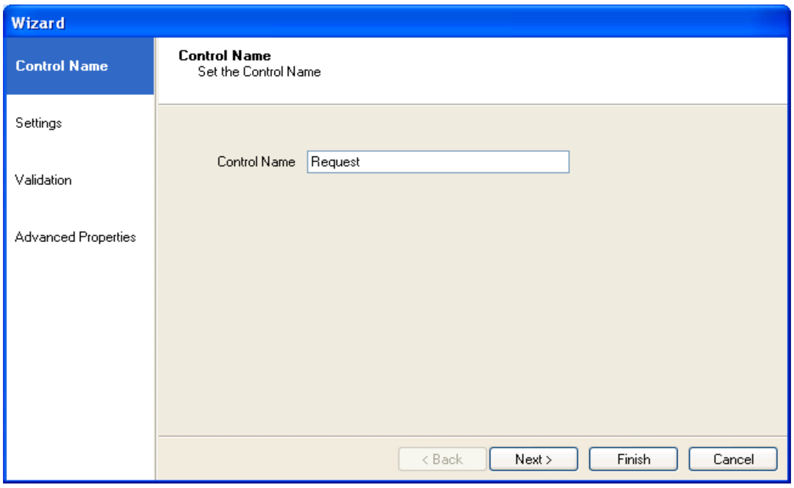
Alternatively, simply click the desired option in the panel on the left hand side.

Web Control Name

The first page of the Control Wizard displayed prompts you to enter a name for the control.

The control name must be different from the section name. If you use the same name, an error message will be displayed, when you click Finish.

It is <u>not</u> advisable to change the control name once the campaign is live, as this will put new columns into the Database and your reports will have to be re-created to point to the new fields.



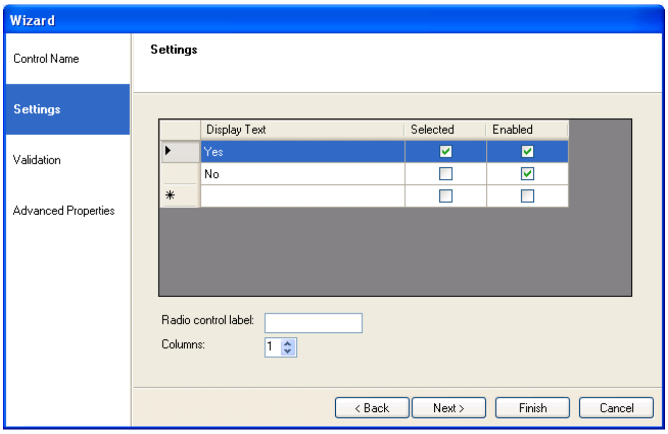
Click **Next>,** to move to the **Settings page** of the Wizard, to continue the configuration of the Radio web control.

Alternatively, simply click the Settings option on the left hand side of the Wizard screen.

Web Control Settings

In the *Settings* window of our Radio web control, we can replace the existing options 'Yes and No' with our own options, as required.

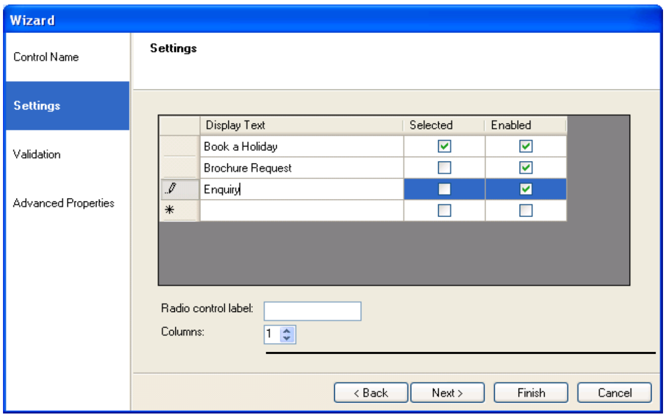
Display Text: shows the text for the options that are displayed to the user.



The focus is on the first line of the *Display Text* section. Simply add your own option. Press **Return** to move to the next line, to enter your next option. Continue the process, until all entries have been made.

*Note: To edit the text entered, double click the option in the display text and type in the new text. To add new options, double click in the display text column next to the *.*

Selected: if ticked indicates that the specific option will by default be selected.
Enabled: if ticked indicates that this option is available for the user to select.
Radio control label: if you like, you can attach a label to the control.
Columns: you can select the number of columns to be displayed, i.e.'1' column.



You can add a label for the control and select the number of columns to be displayed.

To delete an entry, highlight the row and click ***Delete*** on the keyboard.

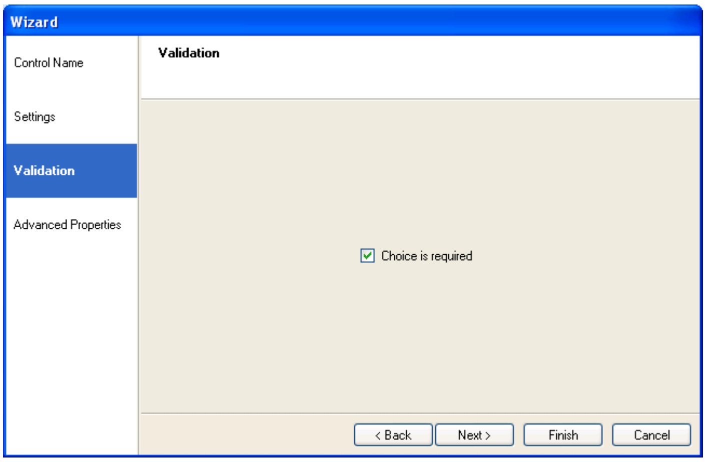
Click **Next**, to move to the Validation page of the Wizard.

Validation of Web Controls

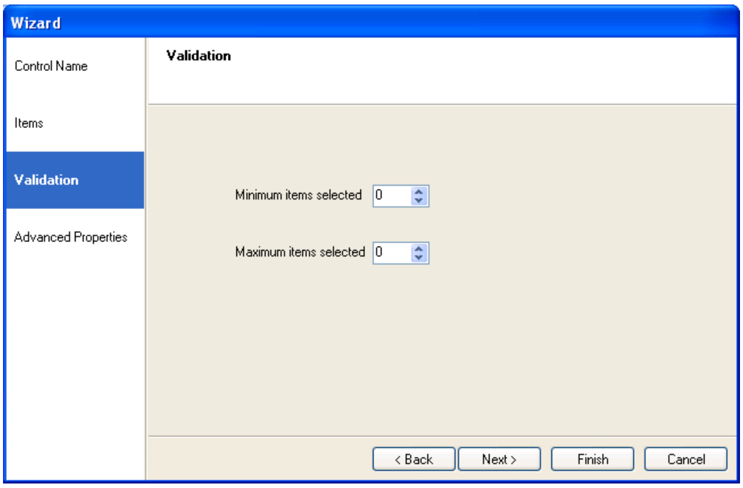
To record specific information, necessary to produce accurate and meaningful reports, you may wish to **make selected fields** within the control **compulsory**.

In the **Validation page** of the Web control, you can instruct the user to complete and put data in the Web control, before allowing them to move on to the next section, by **mark**ing **selected fields or options as compulsory**.

In case of the Radio web control, if 'Choice is required' is ticked, an option must be selected to be able to continue.



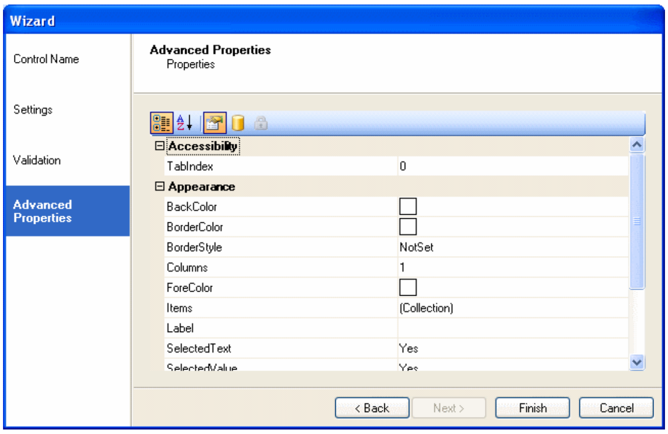
In case of the **Check Box web control**, you can select the minimum and maximum of items that can be selected.



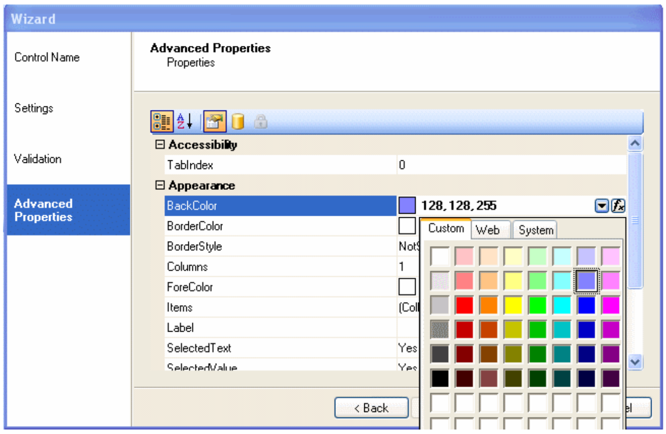
Click **Next>,** to move to the **Advanced Properties page** of the Wizard.

Advanced Properties of Web Controls

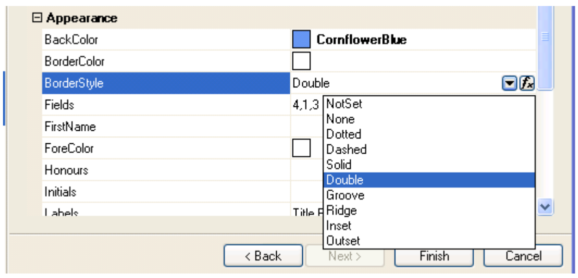
In the **Advanced Properties** page of a Web control, you can change the appearance and behaviour of a control, for example, set background and border colours.



To display, for example a back ground colour, tick the '**BackColor'** box. Now use the drop down menu subsequently displayed to open the colour panel, from where you can select the desired colour.



To display border colours, tick the respective box 'BorderColor', select the desired colour and then set a Border Style.



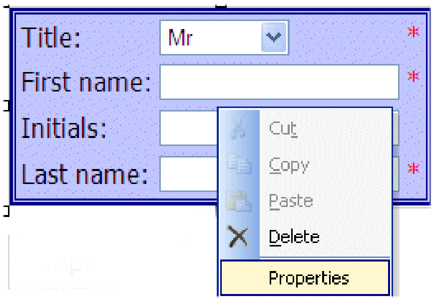
Click **Finish,** to display the configured web control in the Webflow design area.

Editing a Web Control

To edit a Web control, for example to change some of the entries or settings, **right click** on the control and select the **Properties.**

In the section control Wizard that will open, you can make any changes as required.

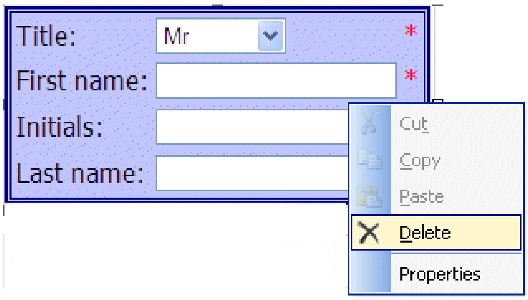
The *stars* indicate fields that have been set to be *compulsory* in the *Validation page* of the control properties.



Deleting a Web Control

To delete web controls, **right click** on the web control and select the **Delete** option.

The stars indicate fields that have been set to be compulsory in the *Validation page* of the control properties.

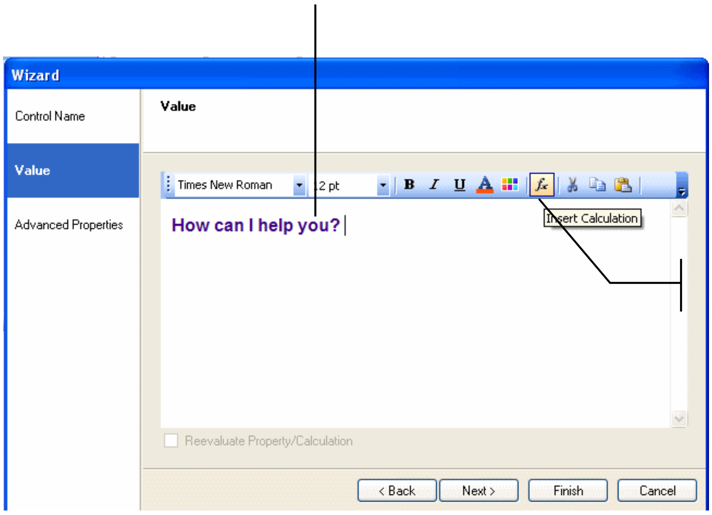


ADDING AGENT DIALOGUE

To enter the appropriate text prompt to accompany the control, you need to use the **Prompt Web control**.

The prompt control is used to add text to any page within your Webflow.

In the **Value page** of the Prompt control, you can enter your free text as required, for example, ‘How can I help you?’ or ‘Can I take your name, please?’



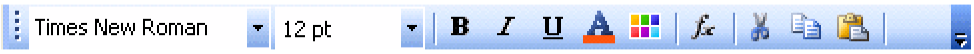
Click here, to add a calculation

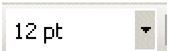
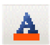
Click **Finish,** to display the configured Web control in the Webflow design area.

Information regarding the *Prompt* control ‘Formatting’ toolbar is described on the next page.

Prompt Control - Formatting Toolbar

The *Formatting Toolbar* is used to apply formatting to text entered into the *Text Prompt Box*:

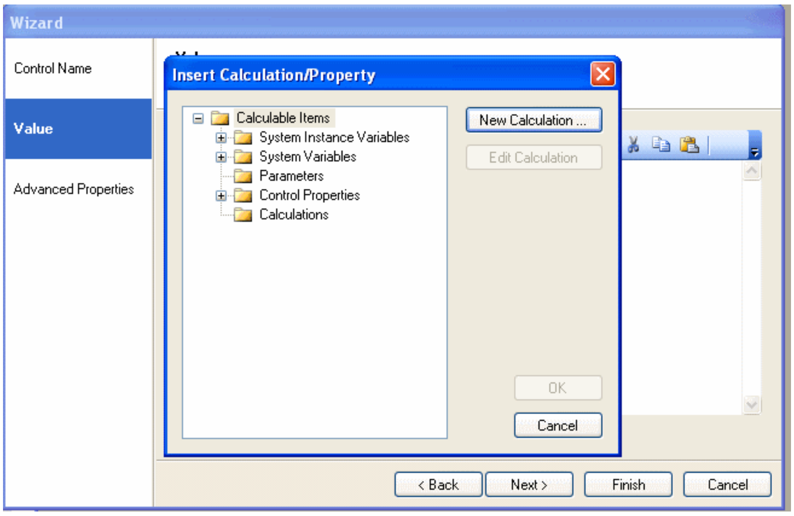


Option	Used to…
	Change the typeface of the currently selected text.
	Change the font size of the selected text.
	Apply bold to the selected text. Click on the button again to remove bold from the selected text.
	Apply italics to the selected text. Click on the button again to remove italics from the selected text.
	Apply underlining to the selected text. Click on the button again to remove the underlining from the selected text.
	Change the Foreground colour of the selected text. You can choose from the standard colour palette that comes with Windows.
	Change the Background colour. You can choose from the standard colour palette that comes with Windows.
	Insert Calculation. Add a calculation to the text prompt.
	Remove the currently highlighted selection and place it on the Windows clipboard.
	Copy the currently highlighted selection to the Windows clipboard.
	Paste the contents of the Windows clipboard at the cursor/ insertion point.

CALCULATION SUBSTITUTIONS

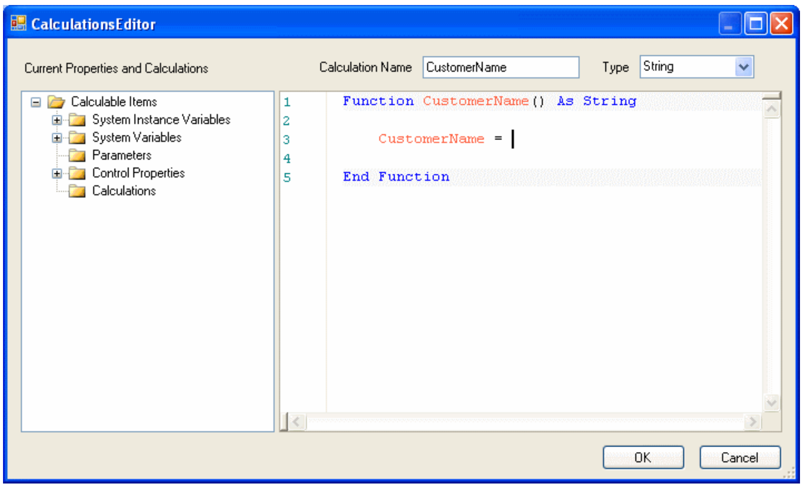
You can use a calculation substitution to bring forward the customer name that has been taken in a previous section.

- Click on the ‘Insert Calculation’ icon, and then click the *New Calculation* button, to display the **Calculation Editor** window.



Enter a Name for the Calculation

- Enter the name for your calculation into the **Calculation Name field**, i.e. **CustomerName.**
- Click your cursor into the calculation window, next to the equal = sign, to display the new calculation name.

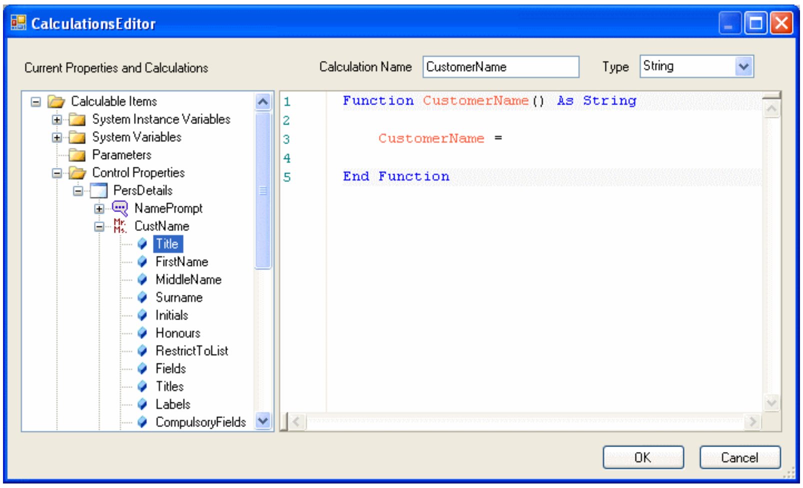


Selecting Calculation Properties

To select the required property for the calculation

- Go to the **Control Properties** folder and select the **section** that contains the **control** and the **field** within the control used to collect the customer's name.

In our example, we have selected the PersonalDetails section, CustomerName control and the Title.



- Double click your left mouse button on 'Title' to add the information from the *Control Properties* folder on the left to the calculation section on the right.
- The operators +" "+ will be added automatically on selecting the second option, i.e. the *Surname.* See the calculation example below*:*

Function *CustomerName*() As String

Calculation1 =
Synthesys.Property.WeekendBreaks.PersonalDetails.CustomerName.Title+" "+Synthesys.Property.WeekendBreaks.PersonalDetails.CustomerName.Surname

End Function

- Click OK, to enter your CustomerName calculation substitution into the agent dialogue box.

Enter the remainder of your agent dialogue as required and remember to SAVE and PUBLISH your Webflow, before testing your substitution in the Web browser.

CREATING CUSTOM CALCULATIONS

The more technical users of Synthesys can also create dll's (**Dynamic-link library**) in an external application and embed them within the Synthesys calculations engine.

This will allow users to create code in ***VB.Net or C#*** and then make it available within the calculations engine as ***Custom Calculations.***

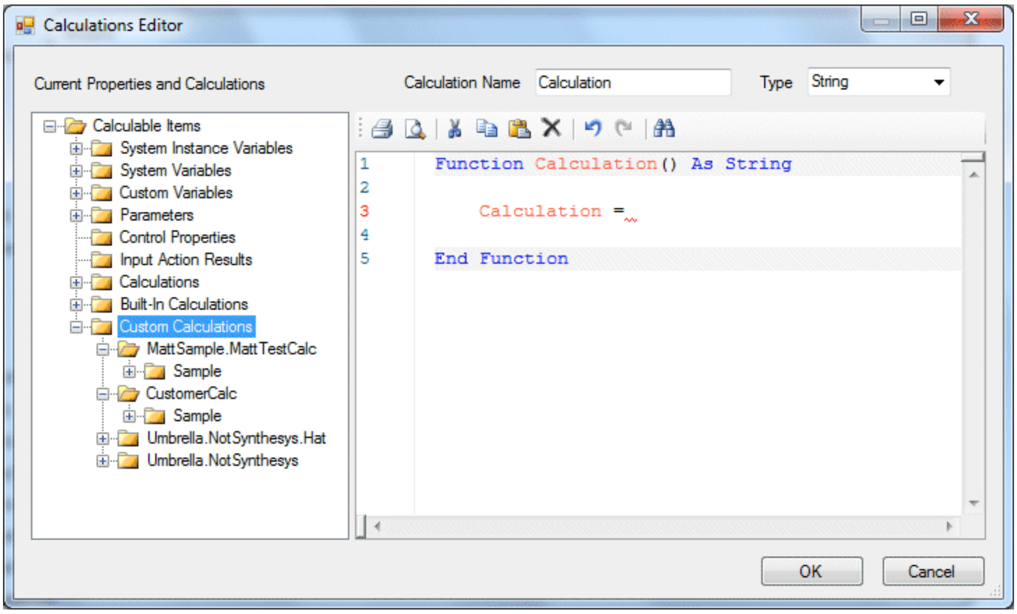
Creating DLLs for Custom Calculations

In order to create a custom calculation:

A dll should be created and placed on the Synthesys server. There will be a directory on the Synthesys server called *Calculations → Custom Calculations*.

Any dll's put into this directory will be synchronised with the Synthesys Interaction Studio when the user synchronises the client machine with the server.

Once Synchronised, users will see the dll's in the tree within the Calculations Editor.



Please see next page for more information.

Synthesys will interrogate each dll and use the information within the dll to generate the tree for the end user to use.

The *NameSpace* will be shown as the top level in the tree (*SPB.Custom Functions)*
Any *Public classes* defined will be the next level in the tree (*Customer Functions*)
Any *Public Static methods* will be the final level in the tree.

To avoid name space conflict with our classes, please do not use Synthesys as part of your *NameSpace*.

Example

Here an example code that would result in the above tree elements being created:

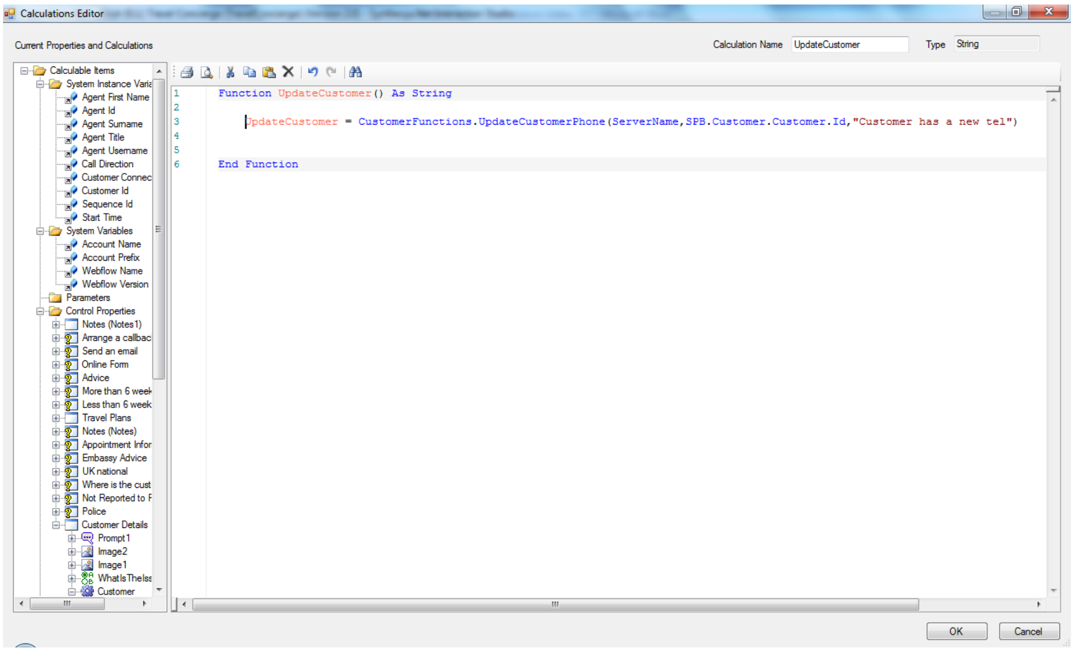
```
namespace SPB.CustomFunctions
{
   public class CustomerFunctions
   {
      public static bool AddCustomerAudit(string UrlBase, string CustomerId, string
Audit)
      {
         try
         {
            Uri uri = new Uri(UrlBase, "/AddAuditItem");
            // ... Code to invoke web service and check return
         }
         catch (Exception ex)
         {
            // Log exception
            return false;
         }
         return true;
      }
      public static bool UpdateCustomerPhone(string UrlBase, string CustomerId,
string Number)
      {
         //...
         return true;
      }
   }
}
```

Using Custom Calculation in the Webflow

To use a *custom calculation* users select and double click on the calculation containing the required Method to pass in the parameters needed by the function.

Parameters can be anything available from the calculations engine, e.g.

- Script objects
- Parameters
- Results of web service calls
- Results of other calculations
- Etc.



Maintaining Custom Calculations

If a change is required to a dll then the following process is adopted:

1. Change the dll in the directory on the server
2. Resynchronise the Interaction Studio
3. Re-release script

If changes have been made and, for example, an extra parameter is required, the release will fail and the calculation will have to be amended.

REGULAR EXPRESSIONS

Regular expressions are used within the *Edit* and *Multi Edit* web controls to create input masks for data entered at runtime. The ***Regular expressions library*** allows users to add their own regular expressions to a global library and to use these within a webflow.

XML File to hold Regular Expression

Users need to create an XML file on the server that will hold the regular expression, together with a short description. Authorised users can then add new regular expressions to this file manually.

The XML file should look like the following example:

<Regular Expressions>

<Regular Expression Name = “My First Regular Expression” RegEx =”[0-9][A-Z][0-1]”/>

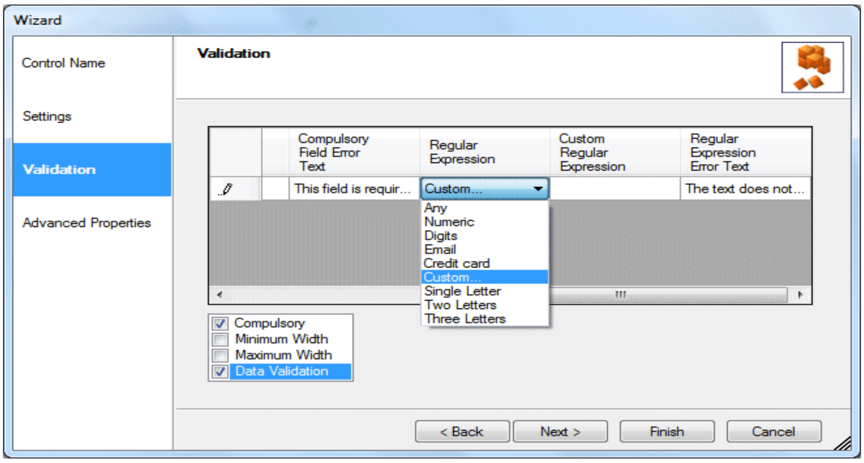
</Regular Expressions>

Using Regular Expressions in a Webflow

At design time in the *Synthesys Interaction Studio* all regular expressions from the XML file will be shown in the *Regular Expression column* of the *Edit* and *Multi Edit* controls.

To pick up a regular expression

- Tick the *Data Validation* check box.
- Select the required regular expression from the drop down menu.



*If you wish to enter, rather than select a regular expression, select **Custom** in the Regular Expression column and enter details into the Custom Regular Expression column.*

DEFINING BRANCHING IN WEBFLOWS

A decision point and associated branches will determine the flow of the call.

Depending on the answer entered, or the result of a calculation, a different path can be followed through the Webflow, asking necessary questions or passing on specific information.

A decision must be placed after the section that contains the web control on which you want to branch.

Branches can contain multiple conditions, reflecting the path that should be taken through the webflow.

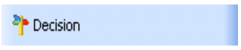
When dropping a *Decision*, the *Decision Wizard* will open and guide you through the steps of adding a name, defining the basis for the decision and adding the required branches. The default branch will be created automatically.

Branches	Description
Default branch	The default branch is created automatically on dropping a decision point. It is the fallback logic that automatically gets used when NO OTHER logic (branching based on answers) gets triggered. The default branch can't be renamed.
BLUE branch arrow	The default branch displays a BLUE branch arrow.
Other branches	Branches are created by the user to define the call paths through a webflow, based on the response to certain questions.
GREEN branch arrow	A GREEN branch arrow is displayed, if the branch contains one or multiple conditions.
RED branch arrow	A RED branch arrow is displayed to remind users that conditions still need to be assigned to the branch.

Please see next page for information about adding decisions and branching.

Adding a Decision to a Webflow

In our example, the path through the Webflow is to change, depending on the option a user selects in the **Radio Web control** in the **Request section**. To enable branching, we need to drop a decision on the line after the **Request** section.

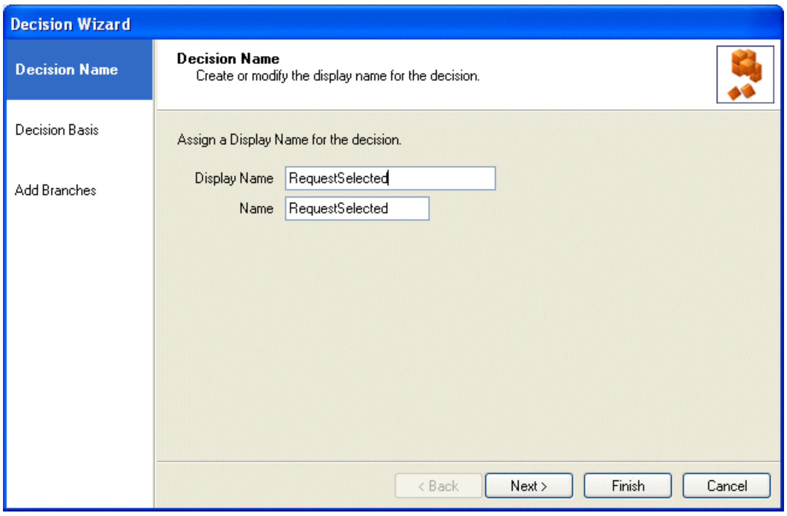
- Select the **Decision** 

symbol from the Webflow Blocks column of the Toolbox.
- Holding down the left mouse button, drag the decision into the Webflow design area on the right, then release the left mouse button to drop the decision symbol.

The Decision wizard will open to guide you through the process of adding a *Decision Name,* selecting the *Decision Basis,* i.e. the control properties or calculation results on which the decision is to be based and of adding the required branches and associated conditions in the *Add Branches* page.

Adding a Decision Name

- In the first page of the wizard, the ***Decision Name*** page, enter a short logical name for your decision into the **Display Name** field.



- Click Next>, to move to the *Decision Basis* page of the wizard, to define the decision.

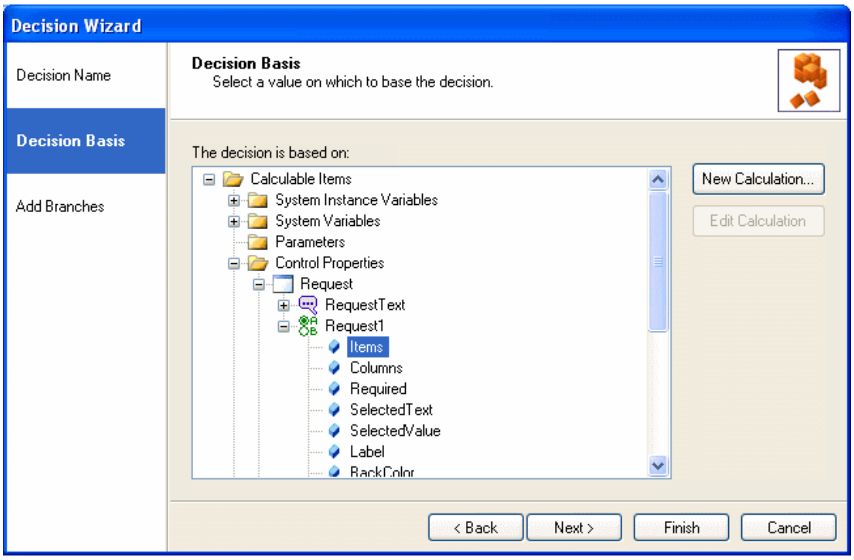
Please see next page for more information.

Decision Basis

Decisions can be based on the properties of a control or calculation results.

In our example, we base the decision on the items selected in our Radio Web control ‘Request’.

- Open the **Control Properties folder,** select the **Section** and **Web control,** on which the decision is to be based, and select **Items.**



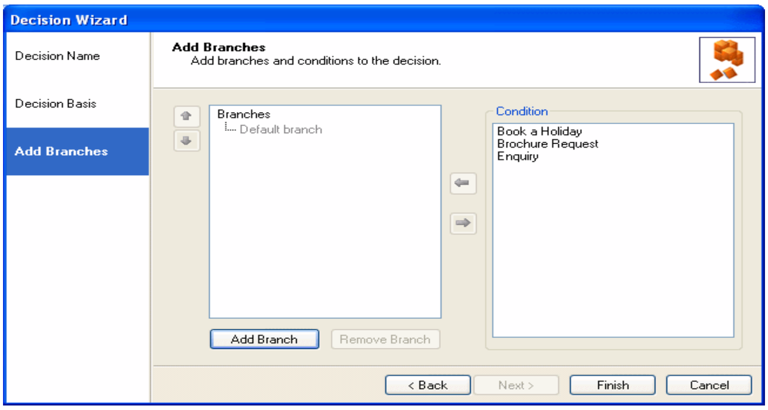
- Click **Next>** to move to the **‘Add Branches’** page of the Wizard, or alternatively simply click the ‘Add Branches’ option on the left side of the Wizard.

In the **Add Branches** page of the Wizard add any branches and conditions, as required. Please see next page for further information.

Adding Branches & Conditions

In the Add Branches page of the Wizard, a default branch has been created automatically on dropping a decision point. The default branch will be used for options not assigned to any of the other branches created for this decision.

- To add a **new branch** to the list under the Branches heading, click the **Add Branch** tab and enter a name for the branch.



To rename a branch, double click on the branch and enter a new name.

The default branch can't be renamed

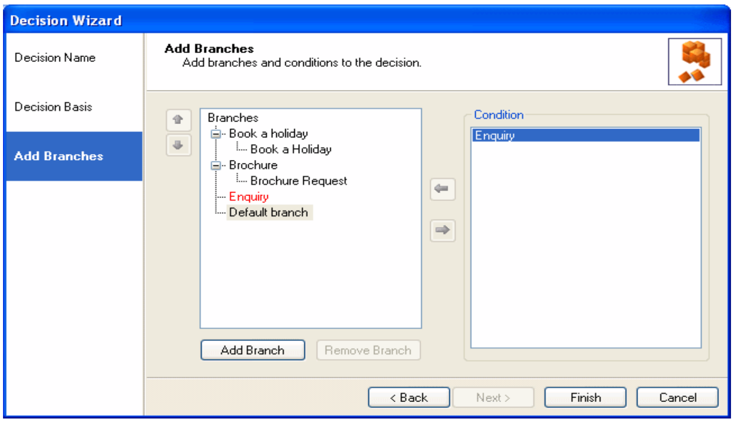
Adding Conditions to Branches

- **Highlight** your **branch**, **select** the appropriate **condition(s)** on the right hand side, and **use the arrow** button to move the condition into the branch.

It is possible to add multiple conditions to a branch, reflecting the path that should be taken through the webflow.

Branches that do not yet contain a condition are displayed in red.

- To ***rename*** a branch, double click on the branch and enter the new name.



It is possible to drag and drop criteria from one branch to another branch, if required.

When you have assigned the relevant conditions to the branches, click *Finish*.

DEFINING DECISION VARIABLES

Decisions can be defined by comparing a variable (such as a control property, calculation result, input action return value, etc.) to an *immediate value*, or against a *variable value*. The name of a variable is defined through the calculation dialog.

- Drop a new Decision into your Webflow.
- Enter a name for the Decision and then move to the *Decision Basis* page of the wizard, to select the value on which to base the decision.

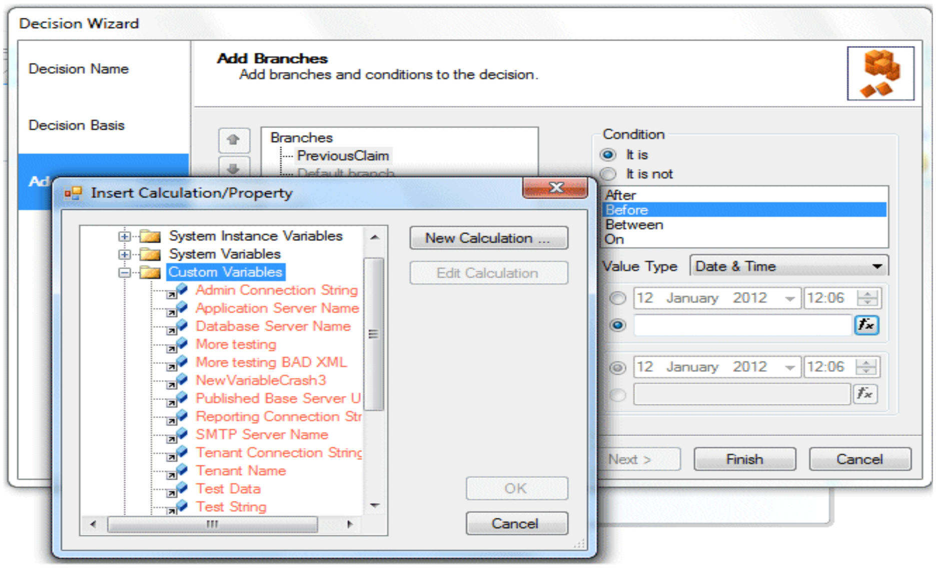
In the *Add Branches* page of the wizard you have the option to compare a variable to an immediate or a variable value.

To use an immediate value, for example when using a *Date Time* control

- Select the ***Condition*** *It is* or *It is not*, followed by either *After, Before*, *Between, On* and the ***Value Type,*** i.e. *Date & Time* and then select the required date time range.

To use a variable value, for example to compare two *DateTime* (DT) controls, in order to move through a particular branch, if the date selected in DT1 is before DT2:

- Select the ***Condition*** *It is*, followed by *Before* and the ***Value Type,*** i.e. *Date,* or *Date & Time.*
- Next, select the field and click on the Calculation icon to open the Insert *Calculation Property* dialog.
- Here you can now ***select or create the relevant calculation*** to define the variable for the condition on which to branch.



- Add any branches, as required, move the associated condition into the branch and click *Finish* to save the information.

DEFINING GLOBAL VARIABLES

Using the *Global Variables Section* users can set and create global variables, which subsequently can be used to access the information set elsewhere in a webflow, for example to accumulate price information or to build a list of items.

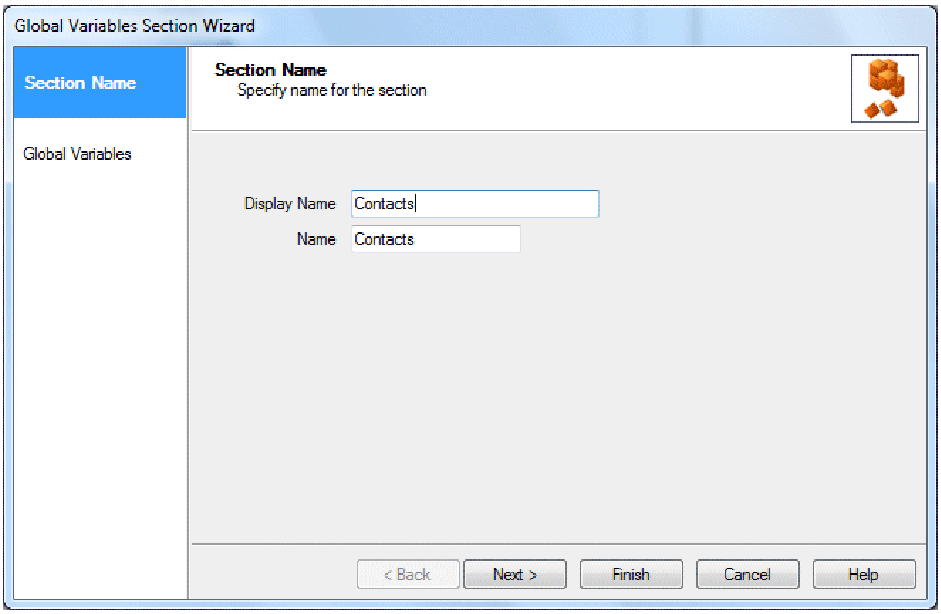
When creating new global variables, users first select its type, i.e. integer, double, character, string, datetime, boolean or listitemcollection from a drop down menu, and then define the variable by selecting the relevant information via the *Insert Calculation Property* dialog.

Adding Global Variables Sections

To add a new *Global Variables Section* to the webflow

- Select the Global Variables Section symbol from the ***Webflow Blocks*** column of the Toolbox in the Synthesys.Net Interaction Studio.

The ***Global Variables Section*** **Wizard** will open, prompting you to enter a descriptive name for the section.

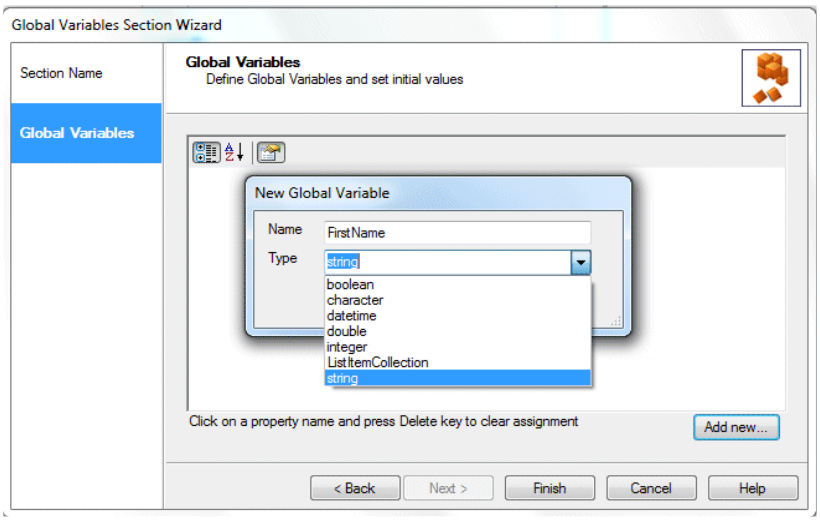


Click **Next>,** to move to the **Global Variables page** of the Wizard, to continue the configuration of the section.

Configuring Global Variables

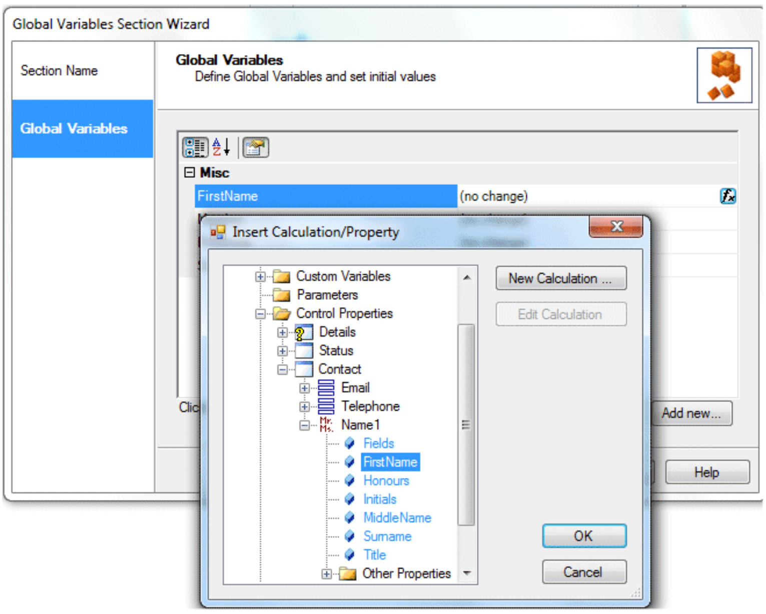
In the Global Variables page of the wizard

- Click the ***Add New*** button and enter a **name** for your first global variable.
- From the **Type** drop down menu select the required type, i.e. integer, double, character, string, datetime, boolean & listitemcollection.



***To define the variable* click on the calculations icon.**

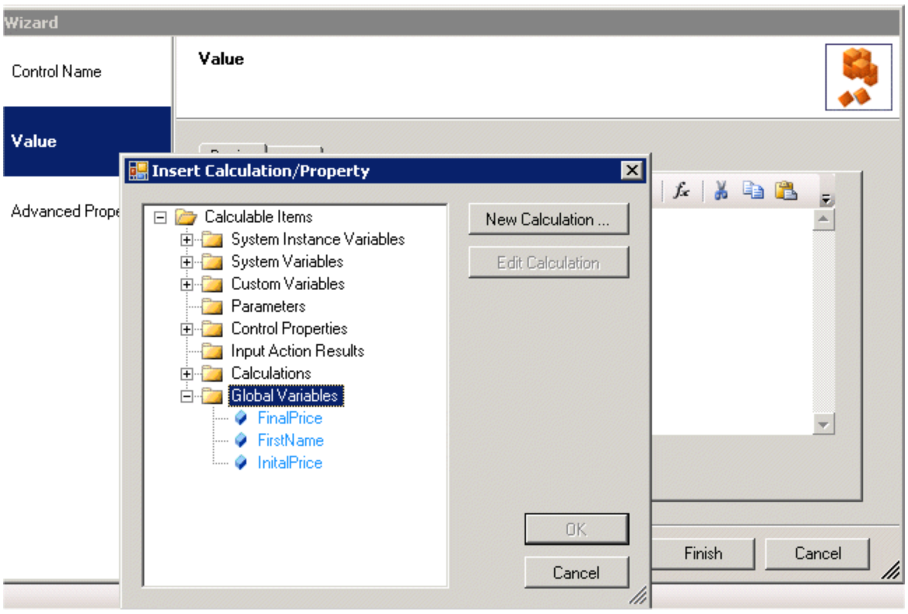
- Locate and select the relevant information in the ***Insert Calculation Property*** dialog
- or create a ***New Calculation*** to define the variable.



Using existing Global Variables

To pick up existing Global variables for use anywhere in the webflow

- Click on the calculations icon.
- In the ***Insert Calculation** Property* dialog locate the Global Variables folder.
- Select the **Variable(s)** that you wish to use at this point in the webflow.



AUTOMATIC TYPE CONVERSION

This allows the Synthesys™ Interaction Studio to feed all/any available values into a property of a control. ALL properties are presented in the *fx "Insert Calculation/Property"* dialog, regardless of the destination type.

Non-matching properties will be displayed using a different colour (blue = ok, red = non matching), but be still useable.

When using a non-matching property (or calculation, or Web Service Input Action return value, or system variable…) the system provides an implicit type conversion from the source variable to the type of the destination variable.

Error handling

Should some type conversions result in errors, for instance an attempt to convert a non-numeric string to an integer or a non-date string to a date, an error message will be displayed containing the webflow name, source string, source and destination types and any other relevant information and will also be recorded in the logs in order to facilitate the debugging of the webflow.

However, an error should not preclude the subsequent run of the webflow as it should simply generate a default value (such as an empty or "error" string or a zero or 9999 value).

Logic for Conversion of types

Synthesys will attempt to convert any/all values by using the relevant *TypeConverter* and call it's *ConvertFrom()* method to convert it to the desired type.

Converting a small number type to a larger type e.g. Short (2 Bytes) to Long (8 Bytes) or converting any value type to a string, for example, should always work.

If the conversion fails (for example the Short to Long conversion may fail going the other way if the Long is too big to fit into the Short), then an exception will be thrown and the default value for that type will be used, as described above.

List of basic data types and their size in Bytes.

Going from less Bytes to more will always work, but not necessarily the other way round.

Key- X – Same no conversion, Y – Will convert , N – Will not convert, M – Will try to convert (in unsuccessful then default values will be set 0 for all the default numbers,"" empty, default string and 01/01/0001 for default date

		To bool	byte	sbyte	char	decimal	double	float	int
From	bool	X	Y	Y	N	Y	Y	Y	Y
	byte	Y	X	Y	Y	Y	Y	Y	Y
	sbyte	Y	Y	X	Y	Y	Y	Y	Y
	char	N	Y	Y	X	N	N	N	Y
	decimal	Y	M	M	N	X	Y	Y	M
	double	Y	M	M	N	M	X	M	M
	float	Y	M	M	N	M	Y	X	M
	int	Y	M	M	M	Y	Y	Y	X
	uint	Y	M	M	M	Y	Y	Y	Y
	long	Y	M	M	M	Y	Y	Y	M
	ulong	Y	M	M	M	Y	Y	Y	M
	short	Y	M	M	Y	Y	Y	Y	Y
	ushort	Y	M	M	Y	Y	Y	Y	Y
	string	M	M	M	M	M	M	M	M
	datetime	N	N	N	N	N	N	N	N

		To uint	long	ulong	short	ushort	string	datetime
From	bool	Y	Y	Y	Y	Y	Y	N
	byte	Y	Y	Y	Y	Y	Y	N
	sbyte	Y	Y	Y	Y	Y	Y	N
	char	Y	Y	Y	Y	Y	Y	N
	decimal	M	M	M	M	M	Y	N
	double	M	M	M	M	M	Y	N
	float	M	M	M	M	M	Y	N
	int	Y	Y	Y	M	M	Y	N
	uint	X	Y	Y	M	M	Y	N
	long	M	X	Y	M	M	Y	N
	ulong	M	Y	X	M	M	Y	N
	short	Y	Y	Y	X	Y	Y	N
	ushort	Y	Y	Y	Y	X	Y	N
	string	M	M	M	M	M	X	M
	datetime	N	N	N	N	N	Y	X

WEBFLOW LAUNCHER SECTION

Using *the **Webflow Launcher section*** in the *Synthesys.Net Interaction Studio*, users can launch webflows within a webflow and pass parameters between the webflows.

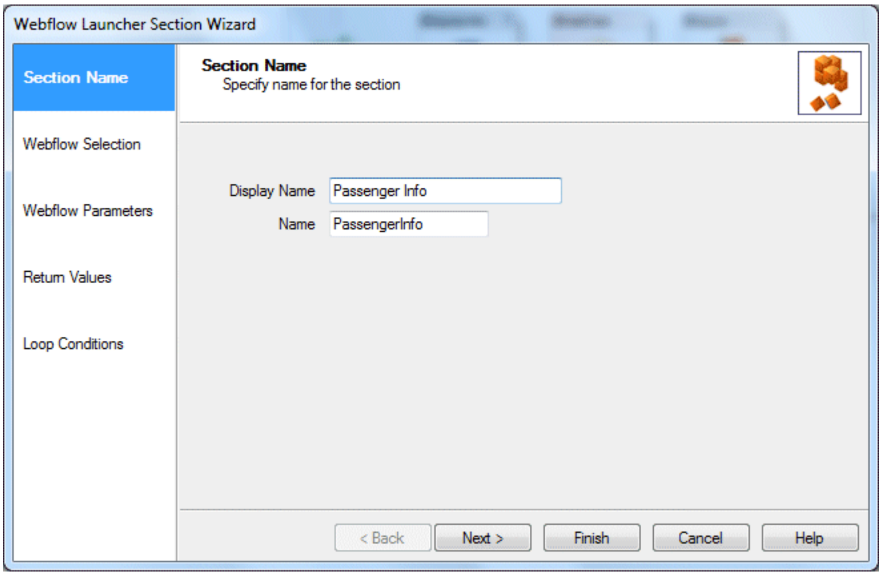
When running calls in the Synthesys.Net Portal in the Web Browser, users initially go through the sections of the main webflow. At the appropriate point, the embedded webflow will open. Having taken the relevant details, users will then return to the main webflow to complete the call.

To add the *Webflow Launcher* section to your Webflow

- Pick up the Webflow Launcher Section icon from the *Webflow Blocks* column of the *Toolbox*, drag it into the *Section* design area and release the left mouse button.

Section Name

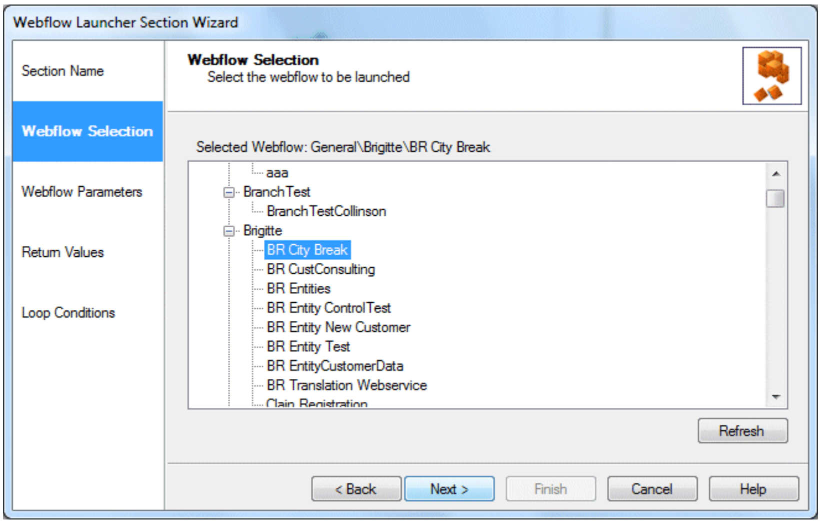
- Enter a name into the *Name* field, in our example ***'Passenger Info'.***



Webflow Selection

In the Webflow Selection page of the *Webflow Launcher Section Wizard*

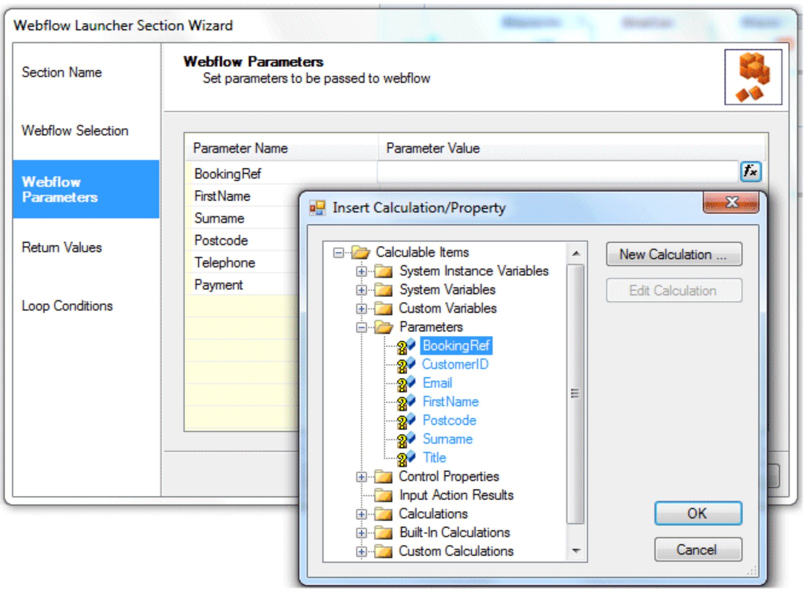
- Locate and select the webflow that you wish to launch in the Webflow section.
- Click *Next>,* to move to the *Webflow Parameters* page.



Webflow Parameters

To pass information from the main webflow into existing parameters of the launched webflow

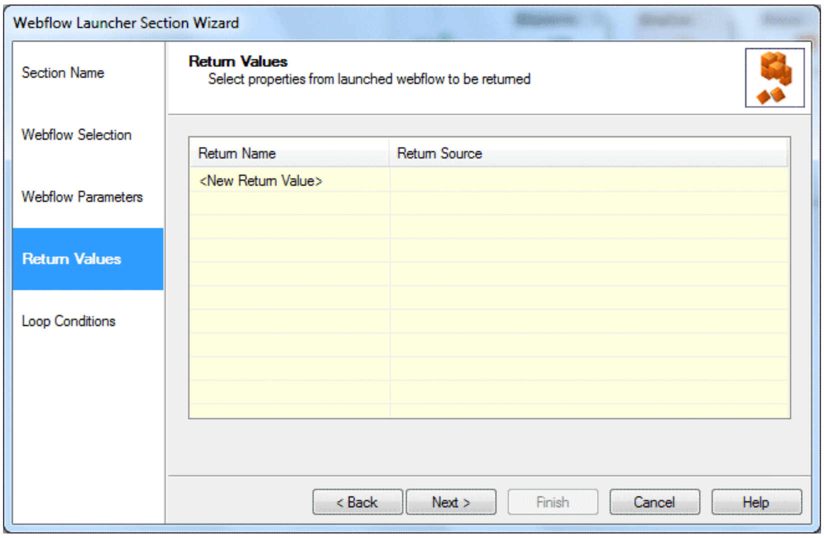
- Click into the ***Parameter Value*** field and then the calculation icon.
- In the *Insert Calculation/ Property* dialog select the folder (e.g. *Parameters* or *Control Properties)* and fields that contain the information to be displayed in the popped webflow.



Return Values

To pass information from the launched webflow back into the main webflow

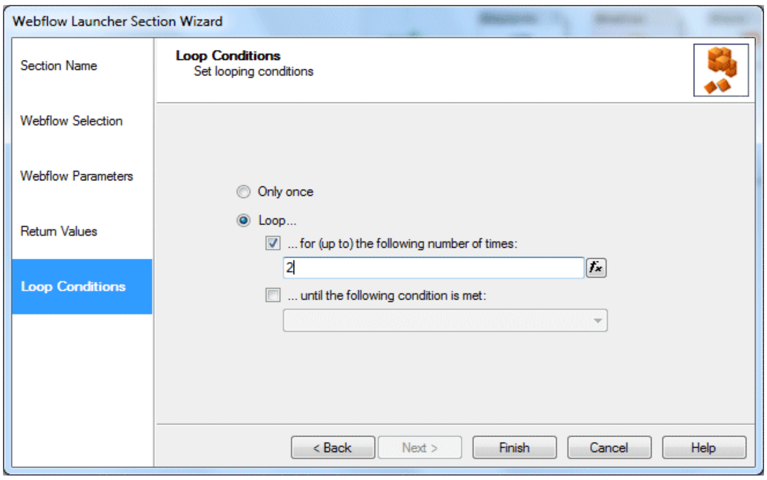
- Click into the ***Return Name*** field and enter a logical name to reflect the data that is to be passed.
- Click into the ***Return Source*** field and then the calculation icon.
- In the *Insert Calculation/ Property* dialog select the folder (e.g. *Parameters* or *Control Properties)* and fields that contain the information to be returned to the main webflow.



Loop Condition

In the Loop condition dialog users specify the number of times that a selected webflow is to be launched.

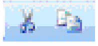
- Select ***Once only***, or **Loop** to enter or create a calculation to determine how many times the webflow is to be launched.
- Tick ..***until the following condition is met:*** to base the decision on an option created in the Return Values page.

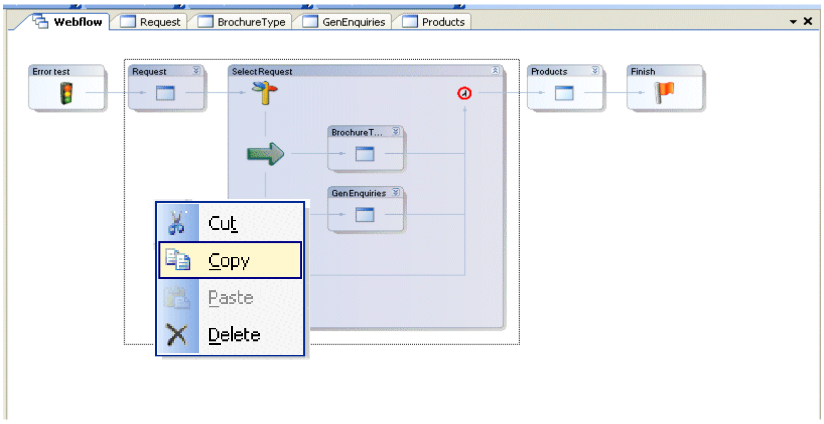


COPYING WEB CONTROLS, SECTIONS & DECISIONS

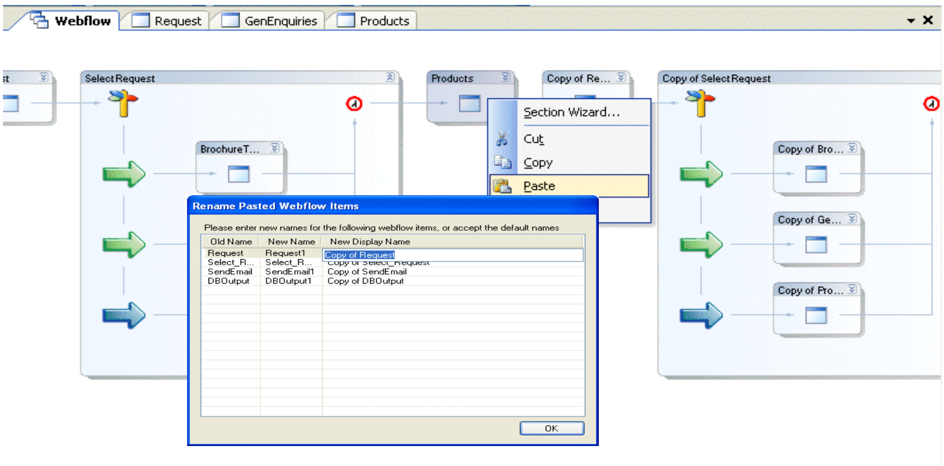
In the Synthesys Interaction studio you can cut, copy and paste web controls, sections, decisions and branches, to increase the efficiency of webflow design.

Select the web control or section that you wish to copy, or hold down the left mouse button and drag a line around multiple sections, decisions and branches and either:

- Select Cut or Copy from the Edit drop down menu
- Use the Cut or Copy icons  on the standard toolbar **or**
- Right click on the relevant section and/ or branch and select cut or copy from the drop down list.



To paste, select and right click on either *the web control, section or the green/ blue branch arrow* <u>after</u> which you want to paste your selection and choose the *Paste* option.



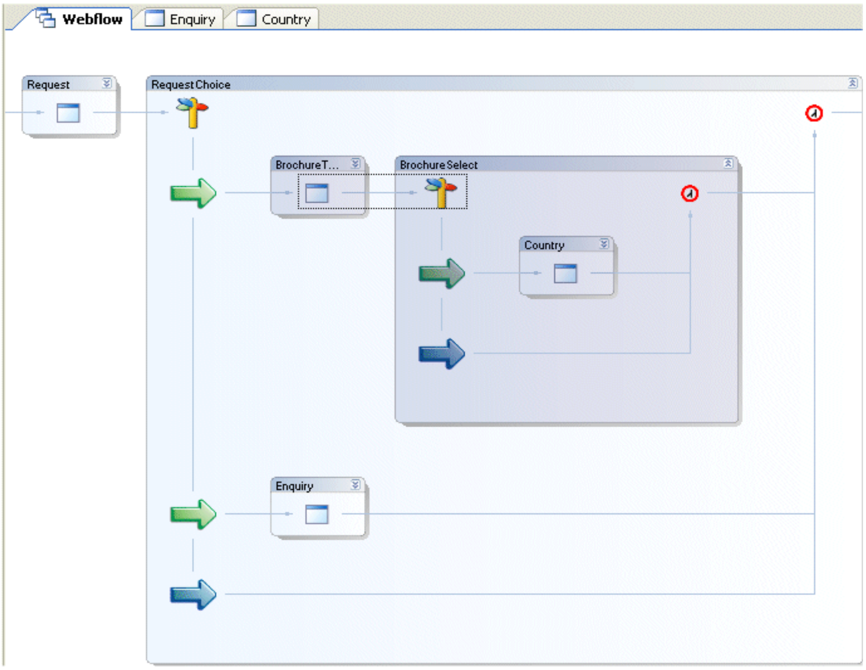
Rename the pasted sections and decisions in the ***Rename Pasted Webflow Items*** grid, entering the required names into the ***New Name*** and ***New Display Name*** fields.

To rename a web control, **right click** on the control and select **Properties.**

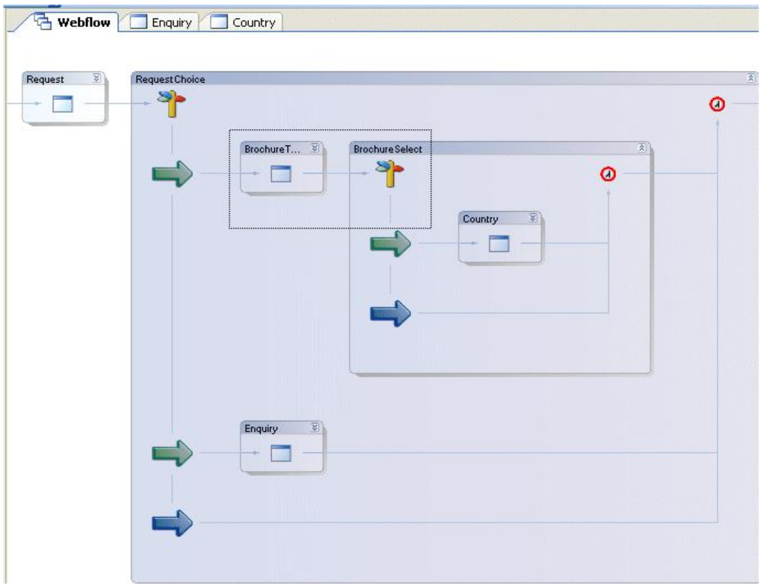
Copying Decisions within Decisions

When copying a section and decision inside another decision, make sure that the line created when you drag the mouse stays within the boundaries of that section, i.e. inside the top, bottom and left border of the section, as shown in the screen print.

Once selected, you can cut / copy and paste the *'inner decision'* to another part of the webflow.



If your selection goes outside of the boundaries of the section as shown below, the '*outer decision'* will be selected and copied.



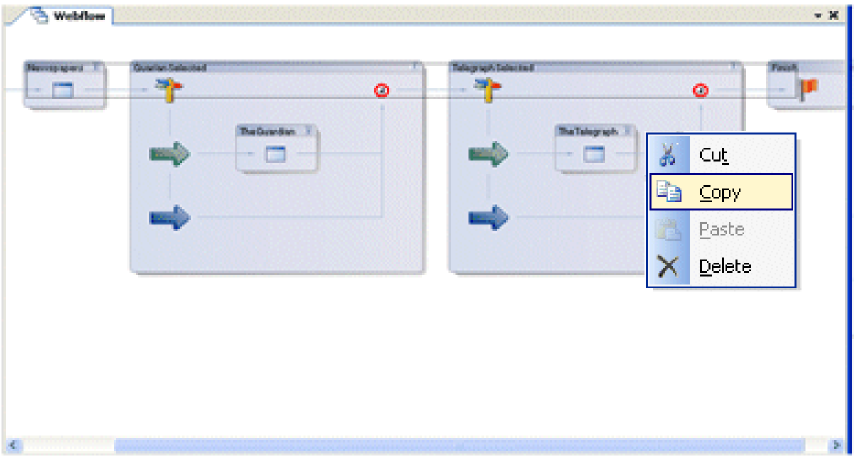
Copying between Webflows

As well as copying and pasting sections and decisions within a webflow, users can copy and paste part of or even whole webflows from one campaign to another.

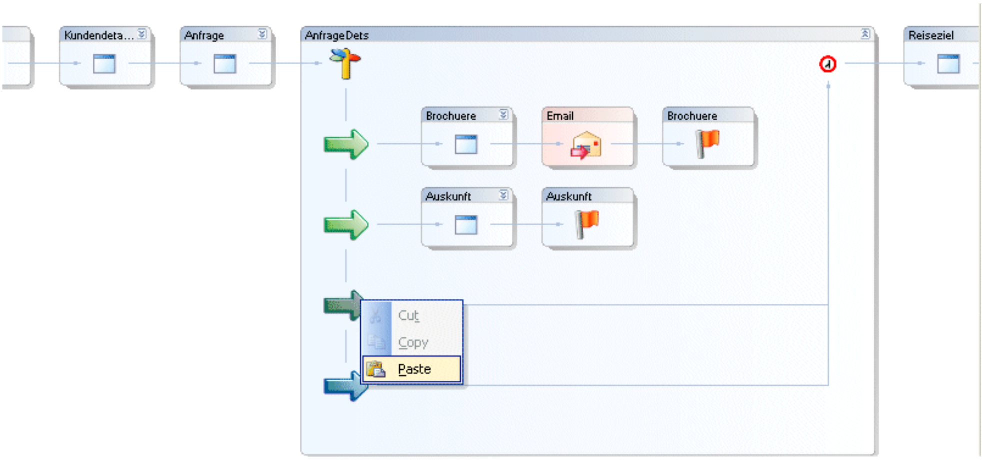
When copying and pasting between two campaigns, two instances of the Synthesys Interaction Studio can be opened on the PC, one for accessing the webflow with the information to be copied, the other for opening the target webflow into which the selection is to be pasted.

In the first webflow, hold down the left mouse button and drag a line through the areas of the webflow that you wish to copy.

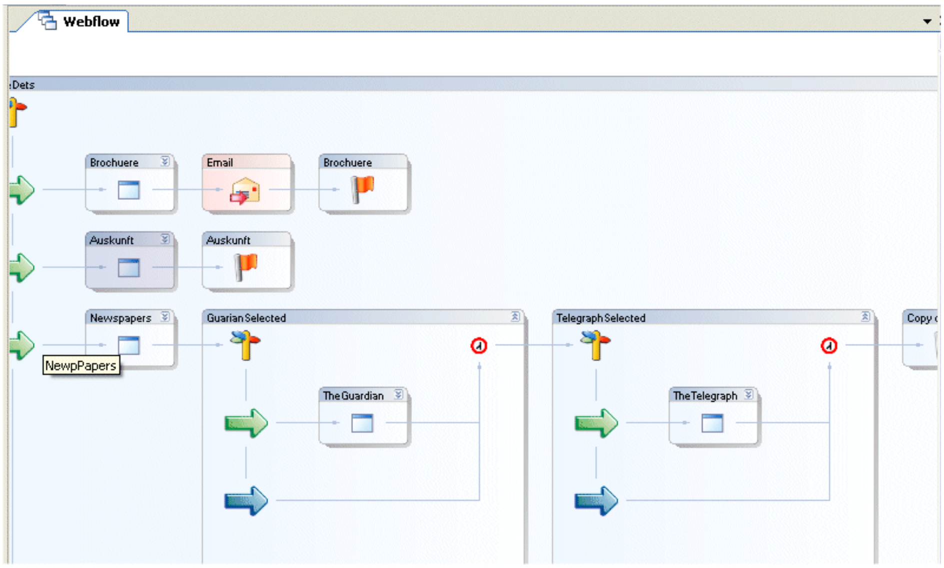
Right click on the selection and select *Copy* from the drop down list.



In the target webflow, click your right mouse button on the ***section or green/ blue branch arrow*** after which you want to paste the selection and select *Paste* from the drop down menu.



In our example, we have copied information concerning newspapers from the first webflow onto a branch of the second webflow.



When copying and pasting sections that contain *calculations*, the section on which the calculation is based has to be pasted as well, otherwise the paste option will be greyed out in the target webflow.

A selection that includes *Conclusion* flags can only be pasted onto a branch without a conclusion. If the branch already contains a conclusion, the paste option will be greyed out.

When selecting sections and branches to copy a complete webflow, do not include the *Webflow Properties* section in the selection, or the paste option will be greyed out in the target webflow.

To reuse a webflow including the *Webflow Properties* section in another campaign, use the 'Save As' function described on the next page.

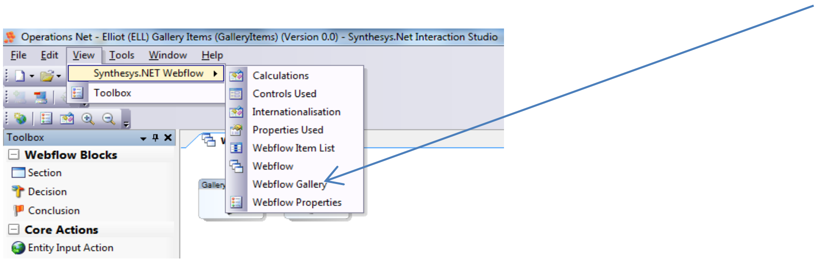
WEBFLOW GALLERY

The *Gallery Items* feature allows users to save webflow objects to a centrally located *Webflow Gallery* to enable the reuse of these items. The types of objects that can be stored are *Sections, Actions, Decisions* and *Collections* of the former.

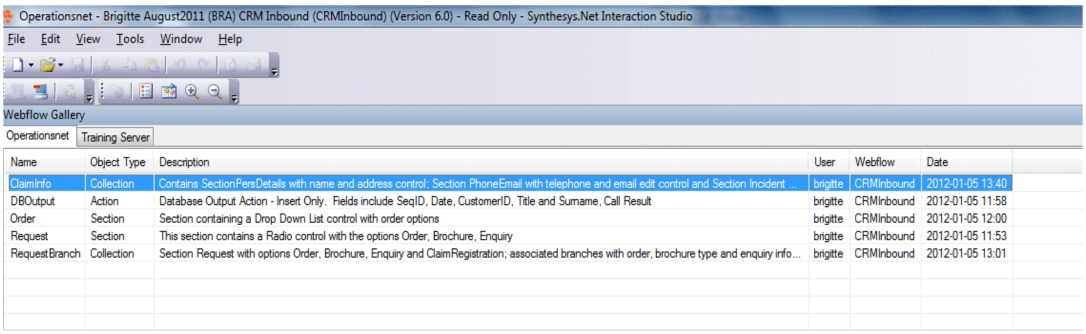
Accessing the Webflow Gallery

The Gallery items view is accessed from the Synthesys.Net Interaction Studio.

Go to View → Synthesys.Net Webflow and select *Webflow Gallery*.



This will enable the *Webflow Gallery view*.



The data held in the gallery includes:

Field	Description
Name	The name given to the item when it was added to the webflow gallery.
Object Type	Describes what type of gallery item it is, i.e. *Section; Decision; Action or Collection* (which includes multiple items from a webflow).
Description	Information entered when the item was added to the gallery.
User	Displays the user who added the item to the gallery.
Webflow	The original webflow from which the item was added.
Date	The date and time that the item was added to the gallery.

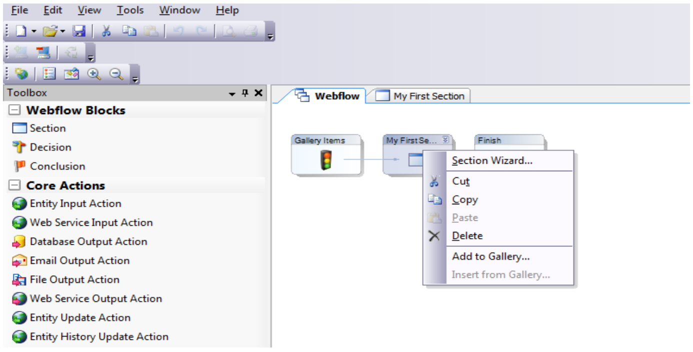
Adding Items to the Webflow Gallery

Users can add an individual item, i.e. a section, a decision or an action to the gallery, or they can add multiple items.

Adding an individual Item

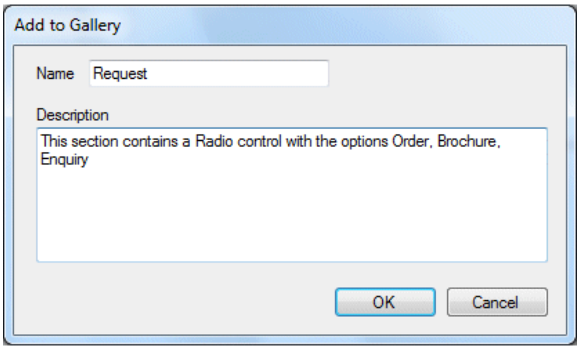
To add an individual item, i.e. a section, a decision or an action to the gallery

Right click on the item that you wish to add and select *Add to Gallery* from the drop down menu.



The *Add to Gallery* dialog will open, with the name of the selected item displayed in the *Name* field.

Confirm or change the name for the webflow item, as required.
Enter a logical description to identify the item to be saved.



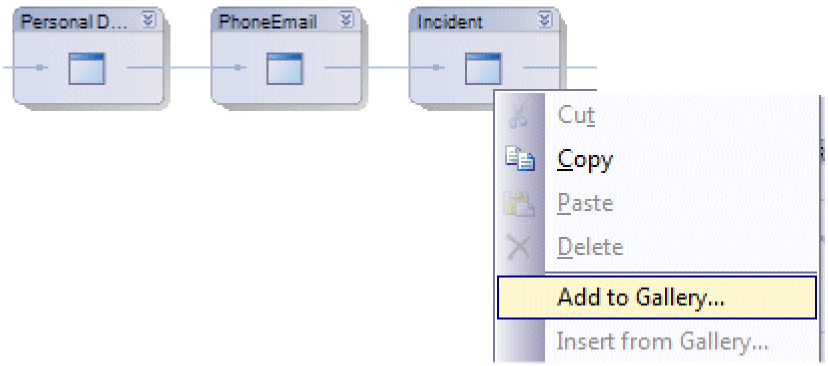
Ensure that the description tells the user all they need to know about the gallery item to make it as easy as possible to later identify and reuse it.

Press OK to commit this item to the gallery, or Cancel to close the dialog without saving the changes.

Adding Multiple Items

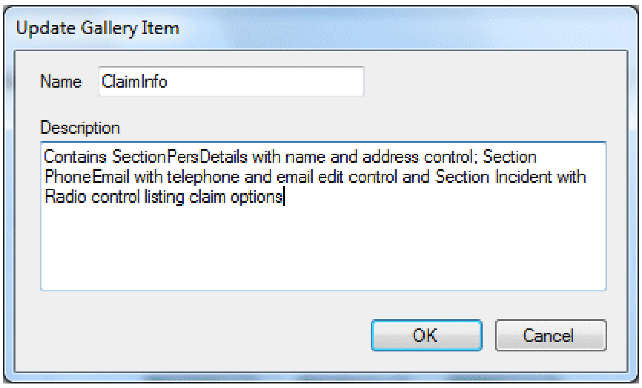
In order to add a collection of items to the webflow gallery

Select all items that you wish to add to the gallery.
Right click on the items and select *Add to Gallery* from the drop down menu.



In the *Add to Gallery* dialog now displayed:

Add a name for the items selected.
Enter a logical description to identify the items to be saved.



Press OK to commit the collection of items to the gallery, or Cancel to close the dialog without saving the changes.

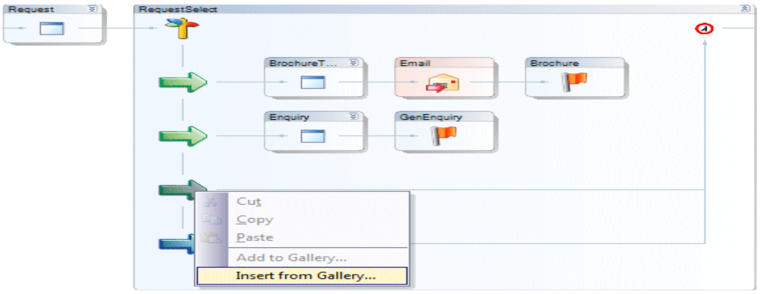
Ensure that the description tells the user all they need to know about the gallery item to make it as easy as possible to later identify and reuse it.

The next page will describe how you can pick up existing items from the gallery and use them in your webflow.

Using Items from the Webflow Gallery

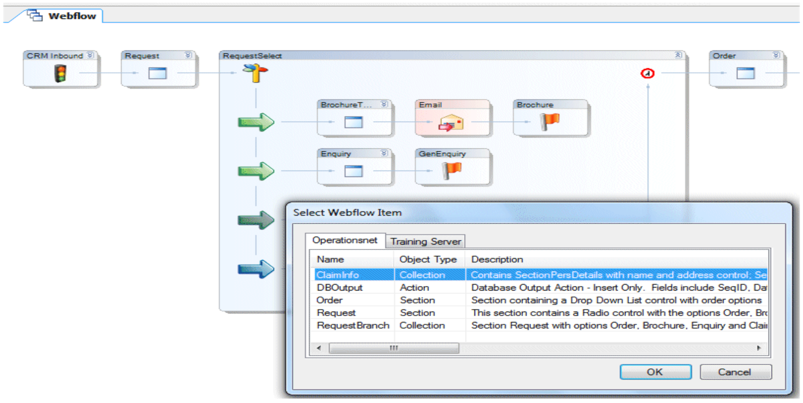
To pick up and reuse an existing gallery item in a webflow

Right click on the section, action or decision that the gallery item should follow. Select *Insert From Gallery* from the drop down menu.



In the *Select Webflow Item* dialog now displayed:

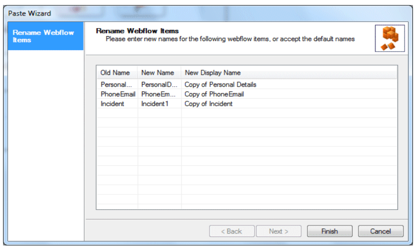
Select the item you wish to add from the list displayed and press OK.



Renaming Items

If the webflow already contains an item with the same name, the *Paste Wizard* dialog will open, prompting you to rename the item to be added.

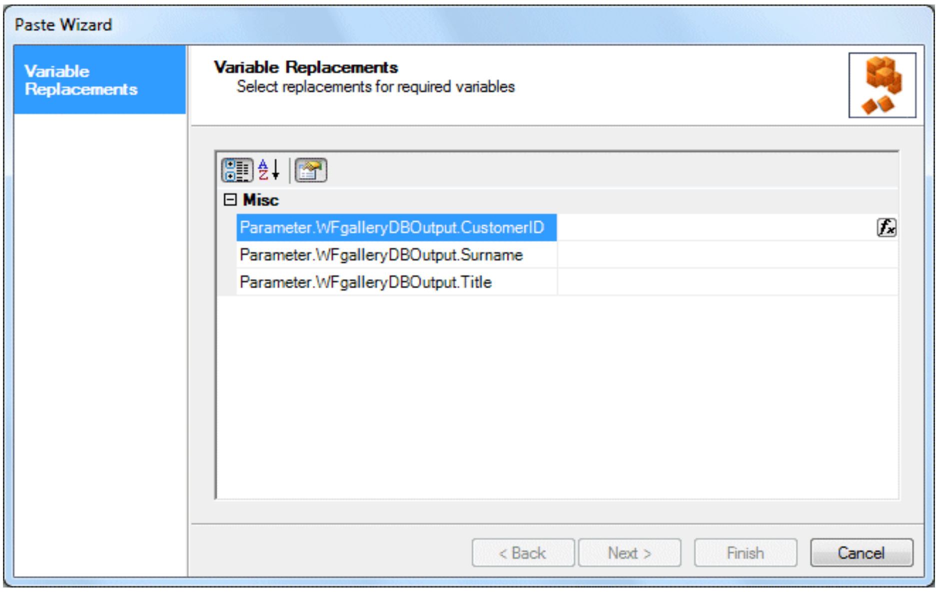
Enter the new name(s) into the *New Name* and *New Display Name* fields.



Updating Variables

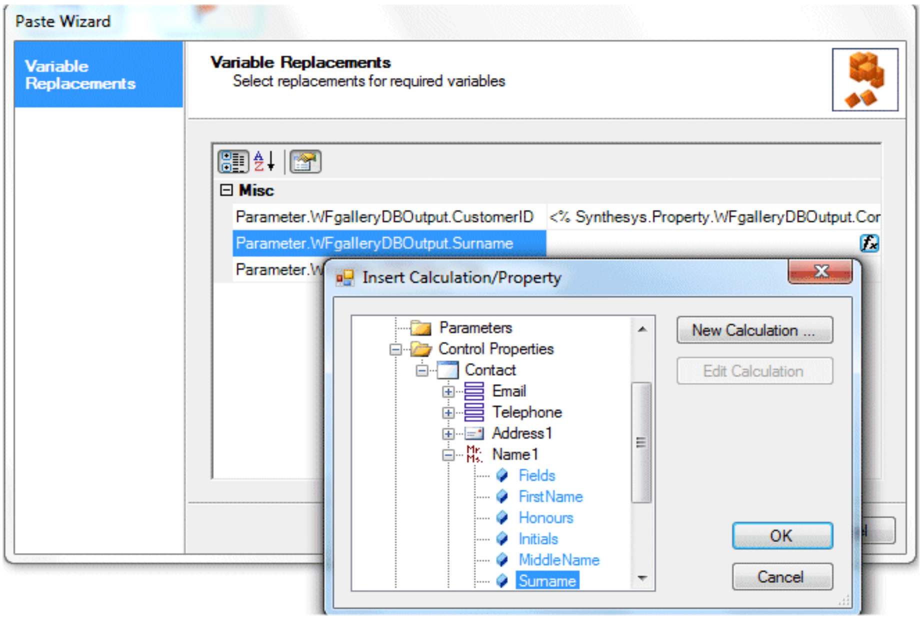
If the item that is inserted from the webflow gallery requires data that is not contained in the gallery item, i.e. when picking up an Database Output action or a section containing a calculation, then

- The ***Variable Replacements*** page will open, prompting users to provide a source for this data by assigning values to variables.



- Update the table below by clicking the icon and select the webflow item that should populate (i.e. provide a value for) each variable.

In our example, we need to populate the CustomerID, Title and Surname fields.

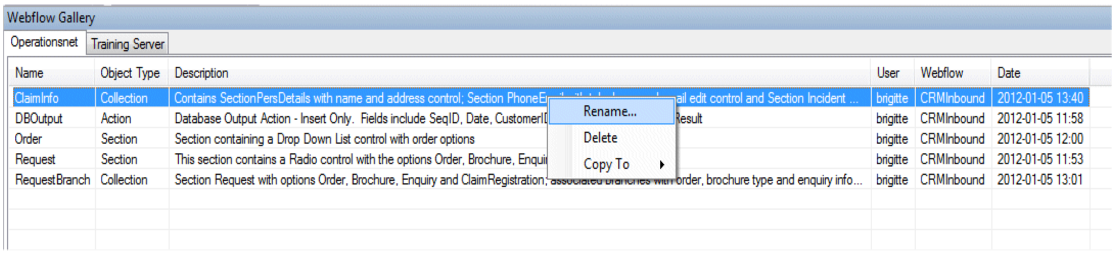


Editing a Gallery Item

It is not possible to edit the description within a gallery item, but users can *Rename* or *Delete* an item.

In the Synthesys.Net Interaction Studio

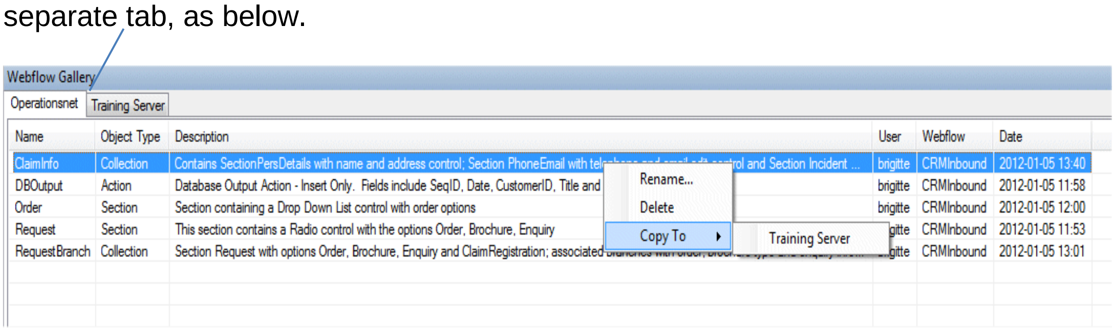
Go to View → Synthesys.Net Webflow and select *Webflow Gallery*.
Right click on the gallery item and select either Rename or Delete, as required.



Mutliple Server Connectivity

If you have multiple servers configured within your Interaction Studio you can use gallery items from either server within your webflow.

The *Webflow Gallery* view will change to a tabbed view, showing each server on a separate tab, as below.



If you have multi server connectivity, you can copy gallery items from one environment to another.
Simply right click on the item to copy and select *Copy To → ServerName.*

SAVE AS OPTION

Using the *Save As* option, existing Webflows can be saved to another server under a new or existing account, or the option can be used to overwrite existing Webflows.

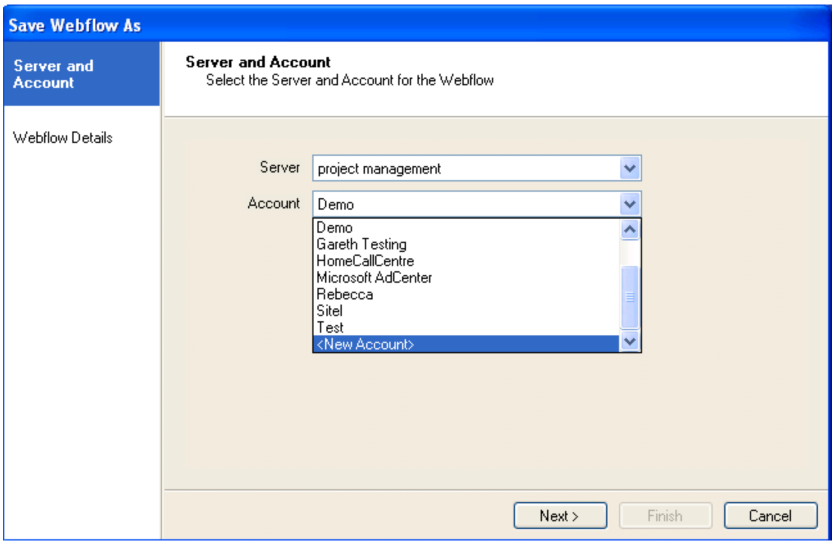
On the Menu bar in the Synthesys Interaction Studio, go to File – Save As.

Selecting the Server and Account for the Webflow

In the *Server and Account* section of the dialogue, select the name of the server on which you want to save the currently open Webflow.

1. You can save the Webflow under an existing account, selecting the relevant account name.

2. You can save the Webflow under a new account, selecting <New Account> and entering an account name and prefix for a new account.



Click *Next*, to move to the Webflow Details page.

3. To replace an existing Webflow, select the name of the Webflow that you wish to overwrite and then click *Finish*.

4. To create a new Webflow, select <New Webflow> and enter a name for the new Webflow and then click *Finish*.

'Save As' will save the current version of the webflow that you have open.

To replace an existing webflow, the destination webflow has to be checked out by you on your local machine.

ADDING CONCLUSIONS

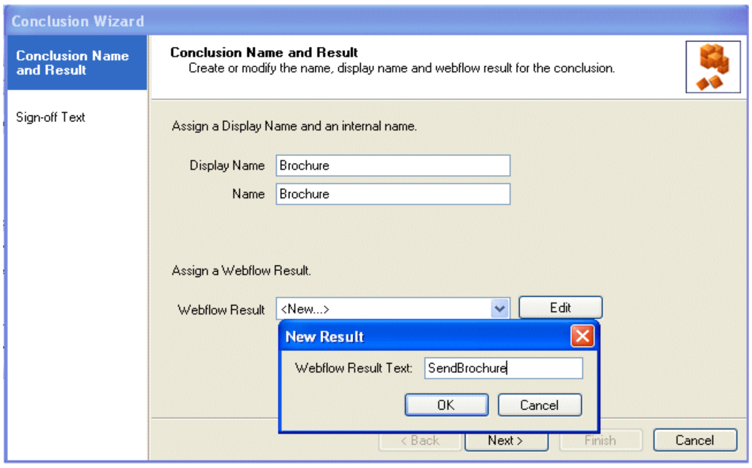
A conclusion is the last section in the web flow.

To create a conclusion, drag the conclusion flag 

from the *Webflow Blocks* toolbar and drop it into the Webflow.

The Display Name you enter, is the name presented to the user.

You can then either select an existing Webflow Result, or create new result.

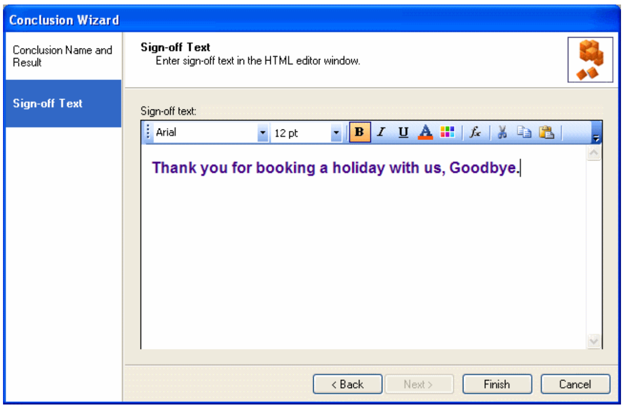


To edit the *Webflow Result* name, click the Edit button.

Sign off Text

To move to the Sign off Text page of the Conclusion Wizard, either click **Next>,** or select **Sign off Text** on the left side of the wizard.

Enter the conclusion text to be presented to the user in the Sign off text page and click Finish.



To open the conclusion wizard to edit details, right click on the conclusion section and select *Conclusion Wizard*.

EDITING LIVE WEBFLOWS IN TEST ENVIRONMENT

It is advisable to edit and test live webflows on a test server, before copying and releasing them on the live server.

'Use the Save As function, to copy your live webflow to the Test server, into your test webflow for editing. When you have tested the changes, copy the updated webflow back to your Live server and publish it.

To ensure that you work with the latest version of your test and live webflow, check out both webflows on your local machine first.

1. **Connect to Test server**.
2. Check out your ABC test webflow.
3. Close the webflow.
4. Disconnect from Test server.

5. **Connect to the Live server.**
6. Check out your ABC live webflow.
7. Copy your ABC live webflow to the Test server, into your ABC test webflow.

To do this, still on the Live server, go to **File – Save** As. Move through the pages of the 'Save Webflow As' dialog, selecting the name of your Test server, and, under the relevant account, the ABC test webflow.

Click Finish, to replace your ABC test webflow with the current version of your ABC live webflow, so that you can safely edit it on your test server.

8. Disconnect from Live server.

9. **Connect to the Test server**.
10. Edit the copied ABC webflow on the Test server, then Save & Publish it.
11. Test the changes made in the Web Browser / Synthesys Portal.

You can keep the edited webflow open in the Synthesys Interaction studio, while you do the testing. Once you are happy with the changes made:

12. Use 'Save As' again, to copy the updated newer version of the ABC webflow from the Test server back to the live server.

13. Disconnect from Test server.

14. **Connect to the Live server**

15. Save & Publish the updated version of the ABC webflow so it becomes live and your agents can take calls.

Webflow Property Options

Properties	Create ***parameters***, for example to make CRM details available in a webflow, to enable branching and calculations and to display CRM details in the *Dashboard*.
History	Access the history of published versions, including version number, date, username and comments.
Encryption	Encrypt details to keep the information save. Encrypted data needs to be decrypted before it can be read.
Abort Reasons	Display a list of aborted reasons for Inbound and Outbound calls.
Dashboard	Display selected Information from a webflow to agents in run time at the top or bottom screen of a webflow.
Default Style	Configure colour and font style for input fields, control labels, buttons and borders of web controls.
Parked & Held Info	Display selected Information from a webflow in the *Parked* or *Held* calls window in the Web Browser.

WEBFLOW PROPERTY OPTIONS

Properties – adding Parameters

Parameters are created in the *Properties* section of a webflow in the Synthesys Interaction Studio, for example to enable branching and calculations on selected Entity/ CRM information, and to display Entity/ CRM details in the *Dashboard* of the webflow.

The Entity/ CRM (Customer Relationship Management) module is designed to manage data, providing agents with the best possible help to deal with customers' requests.

For information about creating Parameters, please see the next page of this document. For information about designing an Entity/ CRM table, importing customer data and creating Outbound call lists, use the document: *Synthesys.Net CRM and Outbound.*

Dashboard and Parked & Held Information

The *Dashboard* and *Parked & Held Info* options are used to display selected information from a webflow to agents in the Web Browser. Information added to the *Dashboard* is displayed in each section; information added using the *Parked & Held Info* option is displayed in the *Parked* or *Held* calls dialog.

The *Dashboard* and *Parked & Held Info* parts are constructed from the **Calculable Items** directory in the Toolbox, selecting the required details from the appropriate folders, i.e. the *System Instance Variables, System Variables, Parameters, Control Properties, Input Action results and Calculations* folders.

Please see the sections *Dashboard Configuration* and *Configuration of Parked & Held Info* on the next few pages for information.

Abort Reasons

This section contains the aborted reasons for the selected webflow, which are displayed to the agent at run time in the Web Browser, when aborting Inbound and Outbound calls.

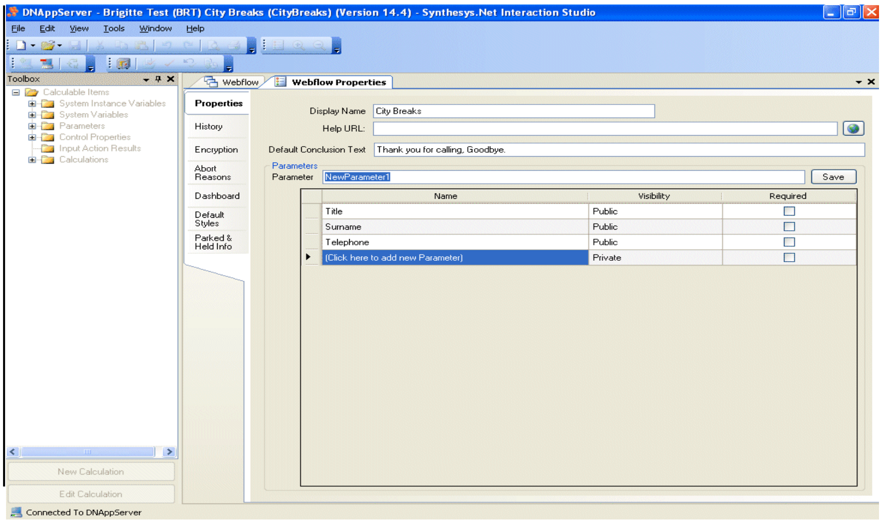
Creating Style Templates

Style templates are configured in the ***Webflow Properties*** section of a webflow, selecting the ***Default Styles*** page. Users can set the colour and font style for input fields, control labels, buttons and borders of web controls, using drop down menu options and *Change* buttons.

Properties - Creating CRM Parameters

To use Entity/ CRM details as part of your webflow, the corresponding parameters need to be configured in the Synthesys Interaction Studio, in the *Webflow Properties* section of your Webflow.

- Double click on the ***Webflow Properties*** section displaying a traffic light, to open the section and then select '*Properties*' to display the ***Parameter*** page.
- In the Parameter section, select the field '(Click here to add new Parameter)'.
- Next, move your cursor back up to the Parameter field and replace the option 'New Parameter1' with the name of the required parameter. The names entered into the Parameter field must <u>exactly</u> match the names of the CRM fields to be used.
- Click the Save button to move the parameter name entered into the list of parameters. If you wish to make a parameter field compulsory, tick the 'Required' option.
- Repeat the above steps to enter the next parameter.



The names entered into the Parameter field must <u>exactly</u> match the field names in the corresponding CRM table.

When using Synthesys in conjunction with the Synthesys Dialler Platform, open the *CRM Maintenance table* to check the CRM field names, before adding or copying and pasting them into the *Parameter* field.

Special keywords that are reserved in programming language, i.e. a word like "Custom" can't be saved.

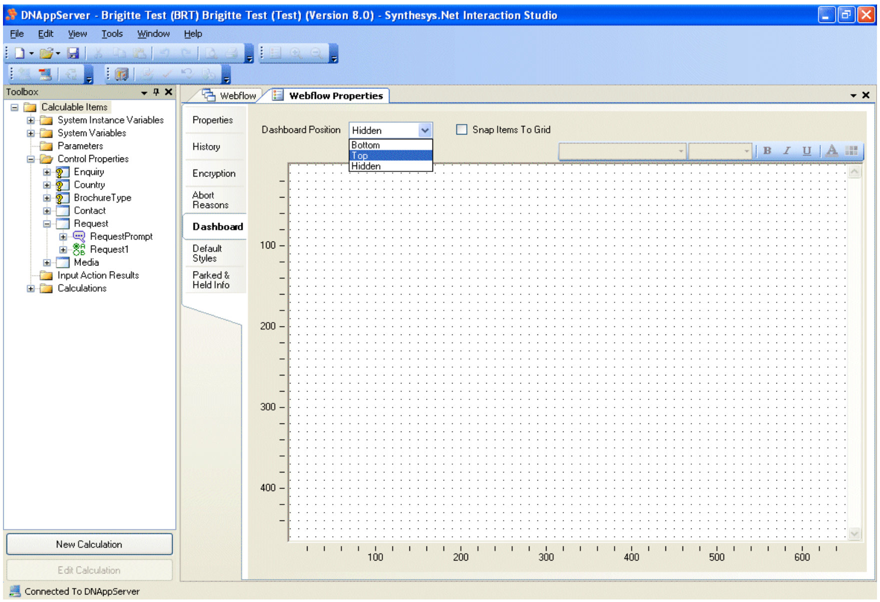
Dashboard Configuration

The Dashboard is used to display selected Information from the Webflow to agents in run time, in the Web Browser.

Introduction

The Dashboard is configured in the Synthesys Interaction Studio, in the *Webflow Properties* section of your Webflow.

Initially, the dashboard is set to ‘hidden’. From the Dashboard Position drop down menu, choose if you wish to display the Dashboard at the top or bottom of the Webflow screen.



Dashboard Position drop down menu

Calculable Items Directory

The required items to construct your Dashboard can be selected from the Calculable Items directory in the Toolbox on the left hand side.

Calculable Items Directory

Available folders include: System Instance Variables, System Variables, Parameters, Control Properties, Input Action results and Calculations folders.

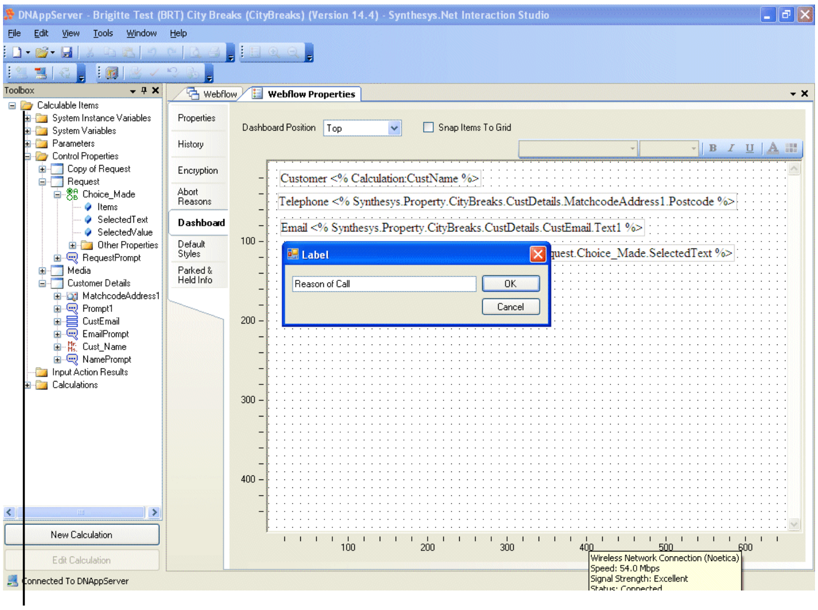
From the *System Instance Variables* folder, for example, you can select information about the Agent i.e. agent name and ID and information related to the Call, including Sequence ID, call duration and Webflow results. From the *System Variables* folder you can select the account name and prefix and Webflow name and version. Existing calculations can be selected from the *Calculations* folder.

The *Control Properties* folder contains all sections and controls of the Webflow, together with any associated call information, which can be displayed on your dashboard via the *SelectedText* option of a Web control.

Configuring the Dashboard

To display, for example, call information collected in a specific web control, locate the web control in the relevant section folder under *Control Properties.*

Select and drag the *required field* to the dashboard on the right side, entering a name in the *Label* box subsequently displayed. Click OK to add the information.



Calculable Items Directory

Add any further details as required, each time selecting the information from the appropriate folders, i.e. the ***System Instance Variables, System Variables, Parameters, Control Properties, Input Action results*** or ***Calculations*** folder.

Configuration of Parked & Held Info

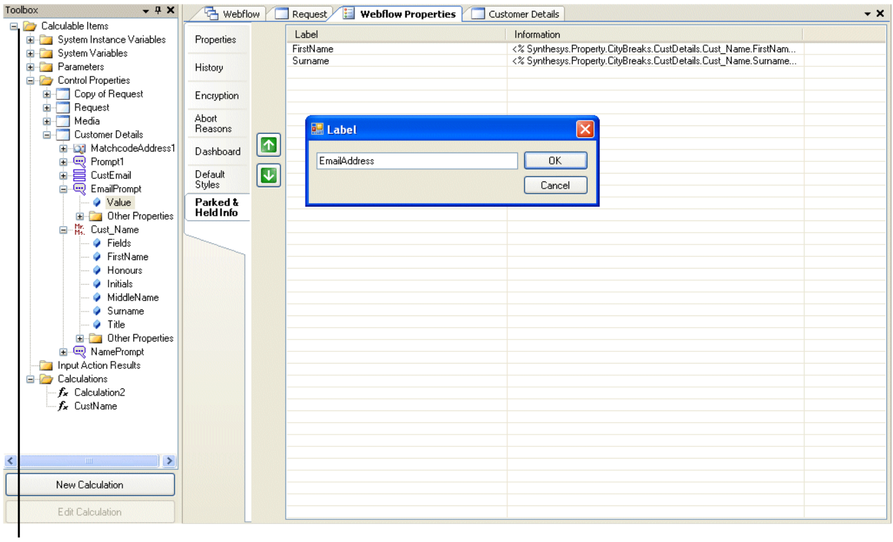
The *Parked & Held Info* option is used to display selected information from a webflow to the agents in the *Parked* or *Held* calls window in the Web Browser.

Configuring Parked & Held Info

Parked & Held Info is configured in the Synthesys Interaction Studio, in the *Webflow Properties* section of your Webflow.

The required details to be displayed as part of the *Parked* or *Held* calls window in the Web Browser are selected from the Calculable Items directory in the Toolbox on the left hand side.

- To add, for example, customer name and email address, go to the **Control Properties** folder and locate the sections and web controls used to collect these details**.**
- Next, select the relevant fields, i.e. **FirstName & Surname**, or in case of the email address the **Text1** field of the Edit control and drag them into the section on the right.
- Enter a suitable name in the **Label** box subsequently displayed and click OK to add the details into the Label and Information columns.



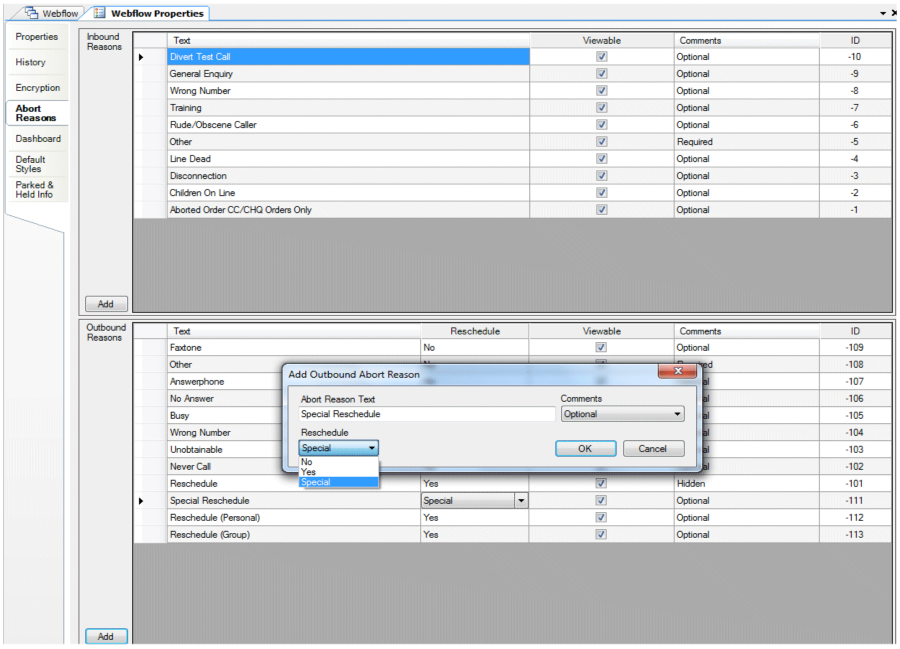
Calculable Items Directory

Add any further details as required, each time selecting the information from the appropriate folders: System Instance Variables, System Variables, Parameters, Control Properties, Input Action results and Calculations.

For more information about the content of the ***Calculable Items*** directory, please see the previous page.

Abort Reasons

The section *Abort Reasons* contains the options available for aborting Inbound and Outbound calls for the selected webflow.



To add further Inbound and Outbound abort reasons, as required:

- Double click on the Webflow Properties section displaying a traffic light, to open the *Webflow Properties* page and go to **Abort Reasons.**
- Select **Inbound Reasons** and click **Add** to enter a new inbound abort option.
- Select **Outbound Reasons** and click **Add** to enter a new outbound abort option.
- If the aborted type is for rescheduling a call, select **Yes** to reschedule, or **Special** (to abort and reschedule a partly completed webflow, retaining entries), else select **No** from the ***Reschedule*** drop down menu.
- Place a tick into the **Visibility** column, to display the option entered to the agents in the Synthesys.Net Portal at run time in the Web Browser.
- Select ***Optional*** or ***Hidden*** from the **Comments** drop down menu to show or hide a comment box with the aborted type at run time, select ***Required*** if you want agents to enter a reason when selecting the aborted type.

Please contact Noetica, if any of the new Outbound abort options entered are to be used as part of call recycling, as the new reasons will have to be added to the *Phoenix Recycling Result* table.

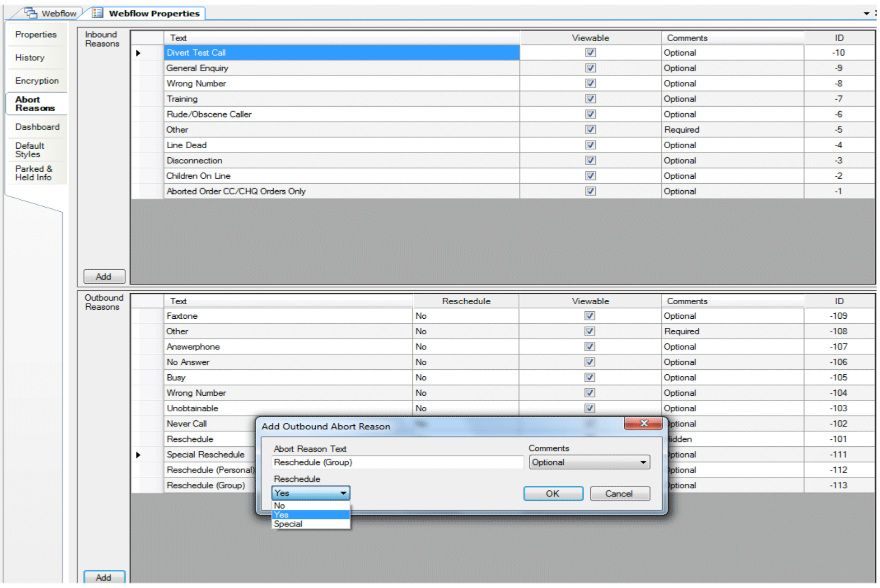
Reschedule Personal and Group Callbacks

Personal and Group call backs are achieved in recycling by creating custom outbound abort reasons in the Webflow Properties dialog.

The Reschedule (Personal) and Reschedule (Group) abort options will override the Operator Bias and Reschedule Flags outbound list settings. Any other reschedule results will continue to look at these advanced property settings as normal.

To add Personal and Group call backs

- Open the Synthesys.Net Interaction Studio.
- Double click on the Webflow Properties section displaying a traffic light, to open the *Webflow Properties* page.
- Select **Abort Reasons** and go to the **Outbound Reasons** section.
- Enter **Reschedule (Personal)** to the outbound abort reasons, to enable personal callbacks.
- Enter **Reschedule (Group)** to the outbound abort reasons, to enable group callbacks.



When taking calls in the Synthesys.Net Portal, selecting Reschedule (Personal) will always reschedule the current call to the current agent, even if P is used as part of the reschedule flags setting, and regardless of whether or not Operator Bias is enabled.

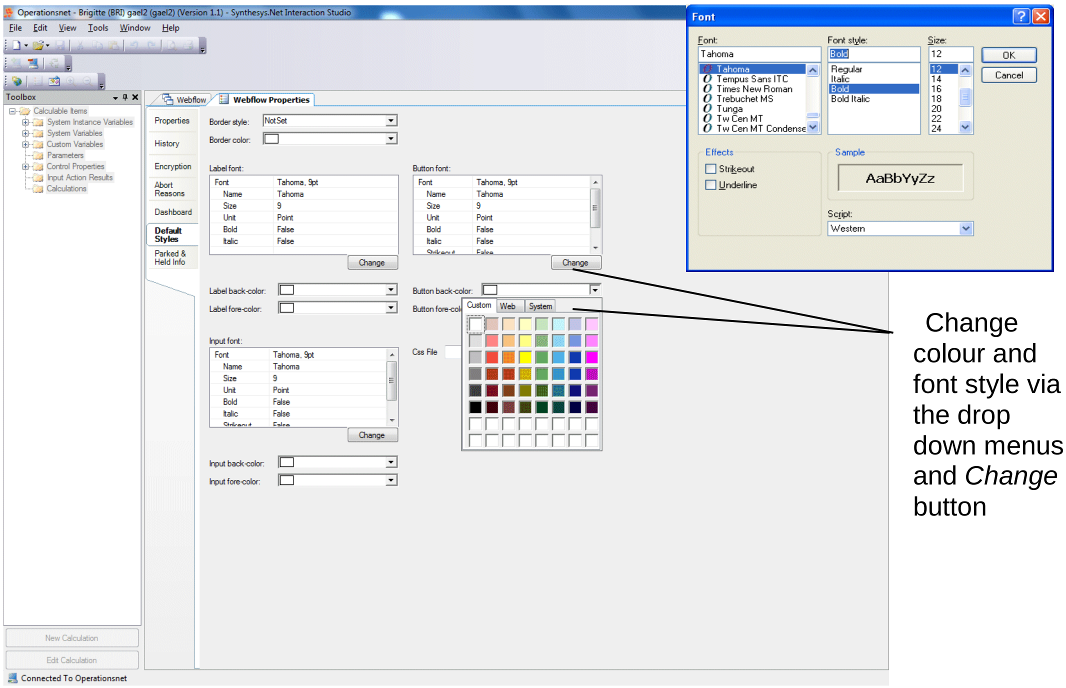
Selecting Reschedule (Group) will always reschedule the current call to *None,* i.e. without assigning an Agent ID, regardless of whether or not Operator Bias is enabled. When P is used as part of reschedule flags, the call will be slept, no agent assigned.

Creating Style Templates

Style templates can be configured in the Synthesy.Net Interaction Studio, in the ***Webflow Properties*** section of a webflow.

Selecting the ***Default Styles*** page, users can set the colour and font style for the input fields, control labels, buttons and borders of web controls, using the drop down menus and *Change* buttons.

Option	Used to
Border	set the style and colour of the border line around a web control.
Label	change font, font style, size, script style, background and forefront colour of the labels for a web control
Button	change the font, font style, size, script style, background and forefront colour of the buttons for a web control
Input	Set the font, font style, size, script style, background and forefront colour of the Input fields for a web control



Change colour and font style via the drop down menus and *Change* button

The style configured in the *Webflow Properties* section will be applied automatically to all sections, controls and dialogs of the current webflow.

Should users wish to display different styles for selected web controls, the styles can be set up, as required, in the *Advanced Properties* section of the relevant web controls.

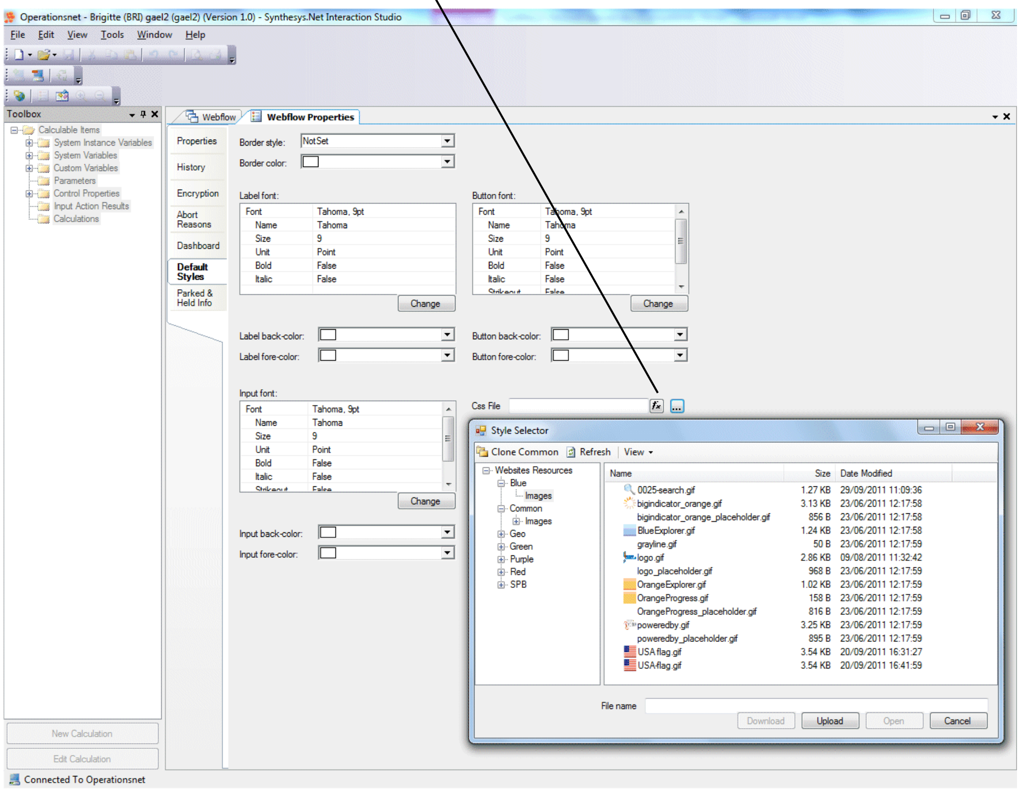
Using Cascading Style Sheets (CSS)

Synthesys uses CSS (Cascading Style Sheets) to manage the look and feel of the webflows at runtime. Users can define their own CSS file, to allow Synthesys to align with any corporate style, as required.

Creating a new CSS file

Cascading Style Sheets (CSS) can be configured in the Synthesy.Net Interaction Studio, in the ***Webflow Properties*** section of a webflow.

- Select the ***Default Styles*** page in the *Webflow Properties* section.
- Click the Browse button  next to the ***Css File*** field to open the **Style Selector** dialog.

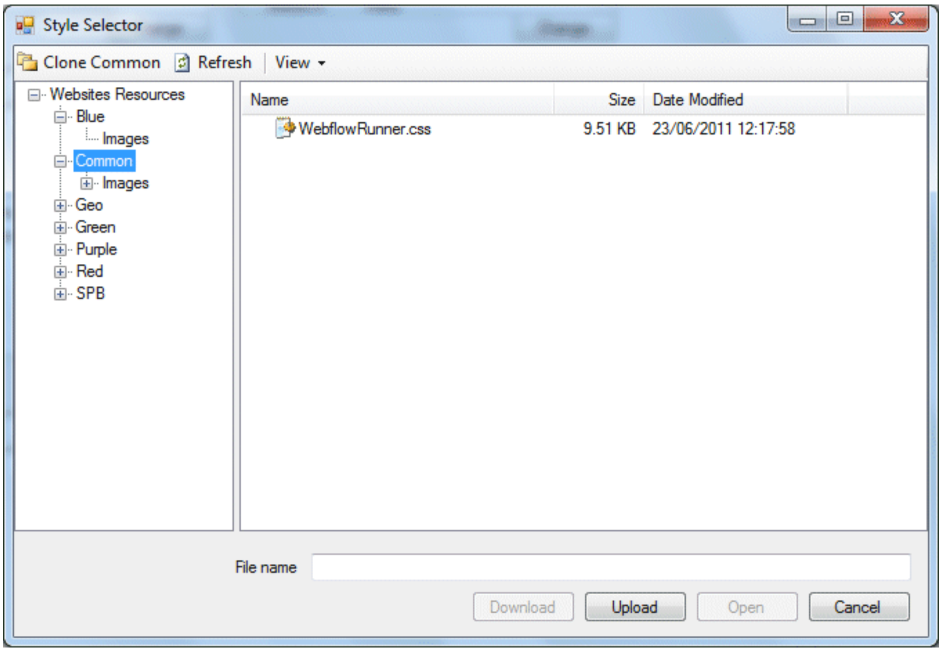


The **Style Selector** dialog displays the list of available CSS and image collections on the system.

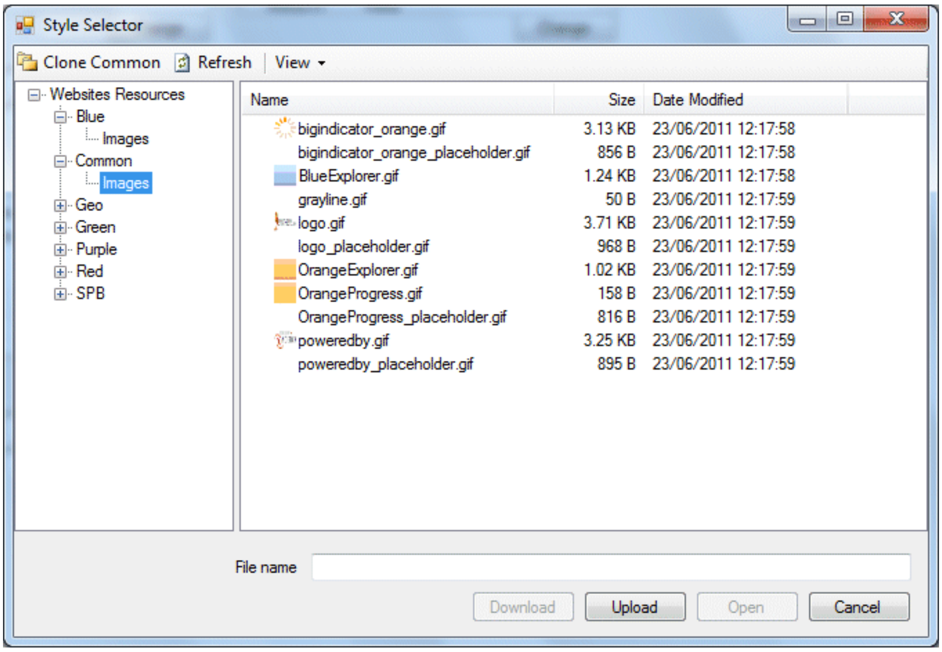
Please see next page for more information.

The Style Selector

The **Common folder** holds the default CSS and images that are used for all webflows by default.



Each folder has a ***CSS file*** which is always called ***WebflowRunner.css*** and also a sub folder that holds all of the images.

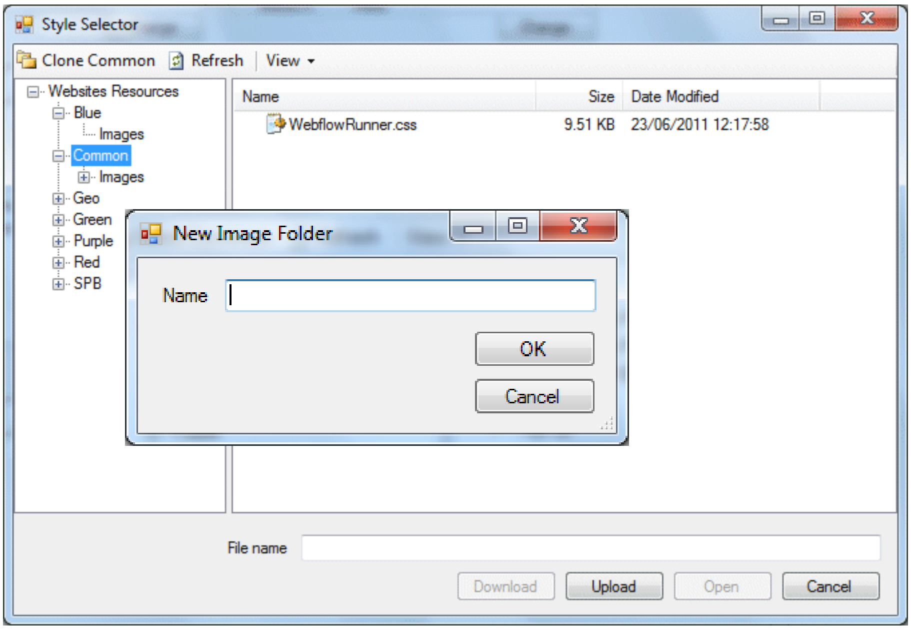


The next section will describe how you can create a new image folder and how to edit files.

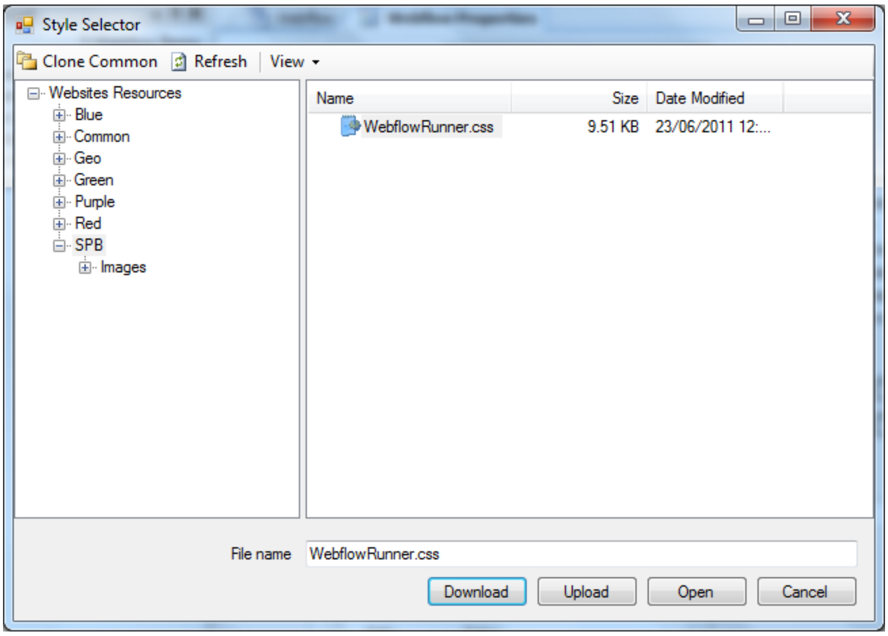
Creating a new Folder

To create a new folder the following steps are to be followed:

1. Press *Clone Common* on the toolbar in Style Selector dialog.
2. Enter a name for the new folder.



3. Press OK to display the new folder in the tree.

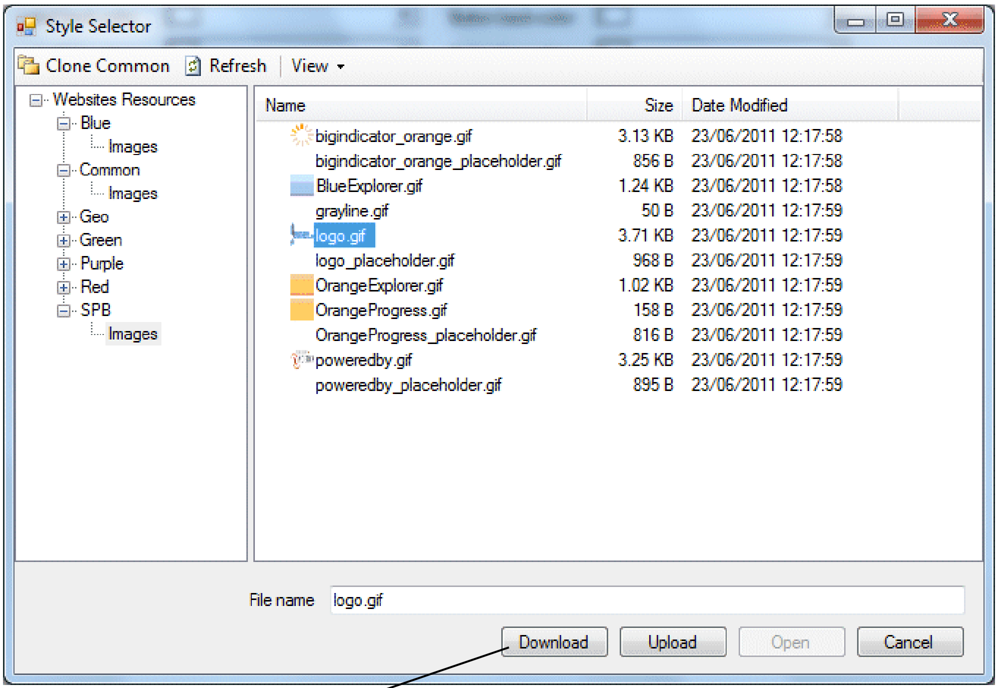


The system has automatically copied all files from common to your new folder and you can now start to edit the css file or any of the images.

Editing existing files

In the **Style Selector** dialog

- Locate and select the file and/ or images that you wish to edit.



- Press **Download**, to download the files to your machine.
- Edit the files as required and then press **Upload** to select the edited files.

Please see next page for all of the elements that can be configured from within the css file.

Contents of WebflowRunner.css

Below a list of all elements that can be configured from within the css file.

ContentsItem sectionsContentsBody ContentsTitle SectionTitle MainView DashBoard Toolbar ToolbarButtonCell ToolBarButton ImgLogo PoweredByLogo Hseparator Separator DashboardSeparator ProgressBar ProgressBarContainer DialogBody CTIPanelTitleCell CTIPanelTitleLabel modalBackground modalPopup standardButton DialogStyle DialogText DialogHeader	waiting For ExternalValuesModal Timer Bar PercentageBar SessionTimoutTitle SessionTimeoutContents SessionTimeoutButton BaseBar errorLabel FooterRow BigIndicator default_section default_webcontrol default_border default_label default_input default_button	CTI: CTIContentsBody CTITitle CTIImageButton CTIPanelTitleCell CTIPanelTitleLabel CTIModalBackground CTIModalPopup CTIModalPopup table ModalPopupDialog standardTextBox standardTextBox_error standardLabel

SYNTHESYS

OUTPUT ACTIONS

Email Output Action

File Output Action

Database Output Action

Web Service Output Action

SYNTHESYS OUTPUT ACTIONS

Email Output Action

The *Email Output Action* enables users to send an instant email as part of the Webflow.

File Output Action

Using the *File Output Action* users can export data from a Web call as a comma separated file.

Database Output Action

The *Database Output Action* allows data from a Web call to be exported to a selected Database.

Web Service Output Actions

The *Web Service Output Action* enables connection to a web service in order to export data from a Synthesys webflow at runtime.

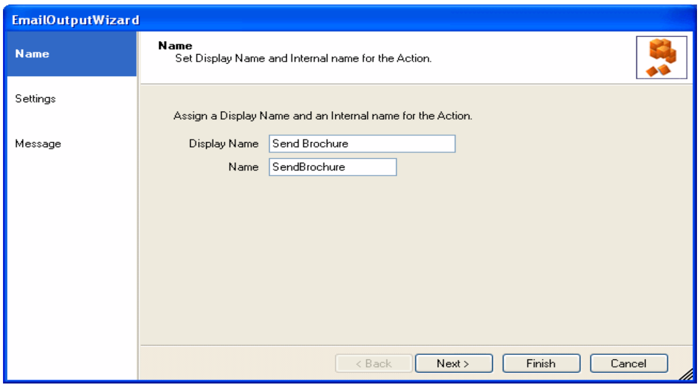
Email Output Action

The *Email Output Action* enables users to send an instant email as part of the Webflow.

In the Synthesys Interaction Studio, select Email Output Action from the *Core Action* part of the Toolbox and drop it at the desired part of the Webflow.

Email Output Name

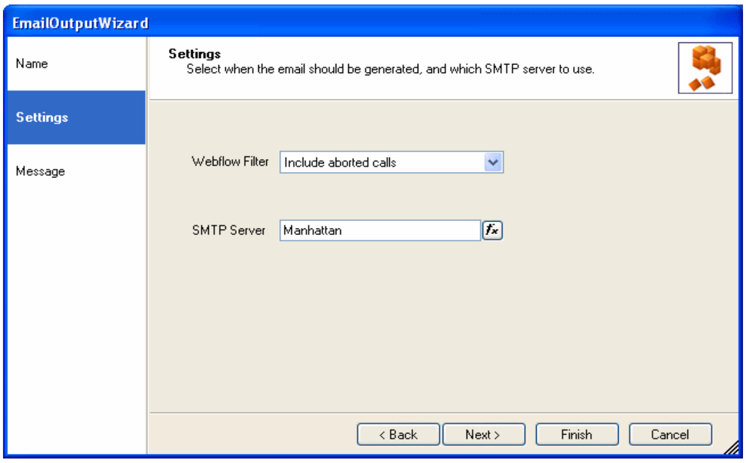
The first page of the *Email Output Wizard* prompts you to enter a name for the *Email Output Action.*



Settings

In the Settings page of the Wizard, under the Webflow Filter option, you can choose to include aborted calls, generate emails on aborted calls only, or exclude aborted calls.

To specify the email server to be used, enter the name of the required email server into the SMTP Server field, or alternatively create a calculation to stipulate the email server.

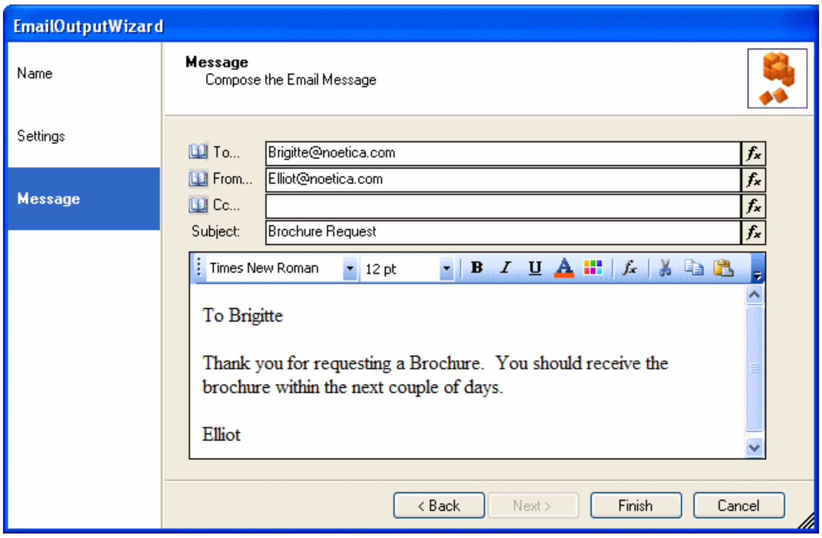


Message

In the Message page of the Wizard, enter the email address of the recipient, the sender and the subject matter of the email.

It is also possible to create a calculation to specify the email address of the recipient, the sender and the subject matter of the email.

Next, write the content of the email into the text page provided, using the *Formatting Toolbar* to apply text formatting and calculations as required.



Click **Finish,** to display the configured *Email Output Action* in the Webflow design area.

Noetica

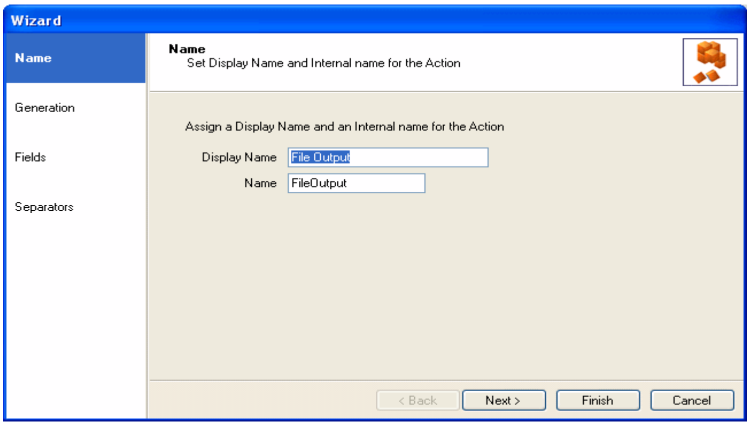
File Output Action

The *File Output Action* allows data from a Web call to be exported as a comma separated file.

In the Synthesys Interaction Studio, select File Output Action from the *Core Action* part of the Toolbox and drop it at the desired part of the Webflow.

File Output Name

The first page of the Wizard prompts you to enter a name for the File Output action.

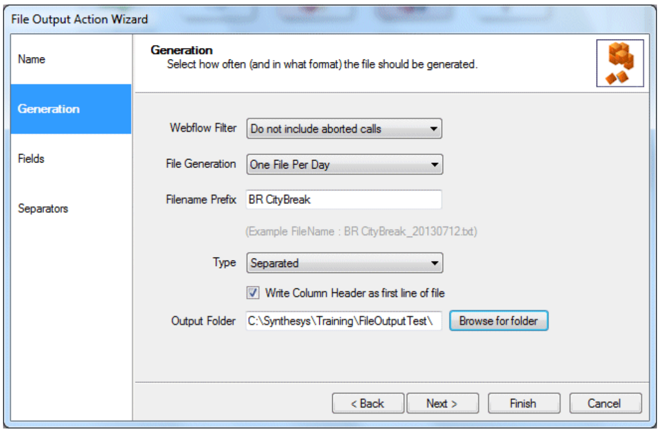


File Generation

In the Generation page of the Wizard, under the *Webflow Filter* option, select if the file that you generate should include aborted calls or not, or aborted calls only.

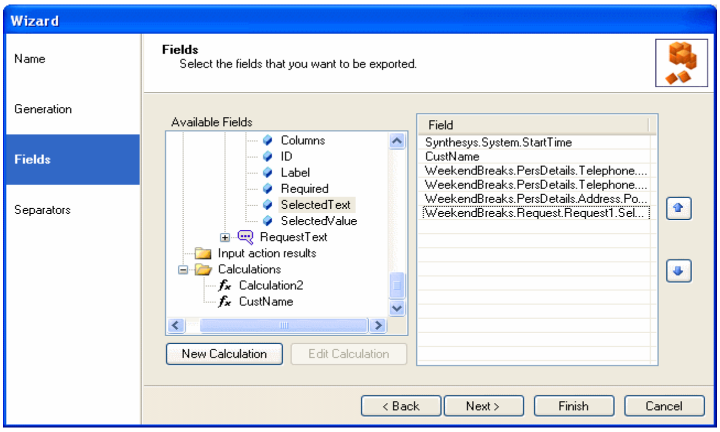
Using the *File Generation* option, you can specify to generate one file only,or one file per record, per day, month or year and then enter the file name or prefix.

Next, select the file Type, *Separated* or *Fixed Width,* tick the checkbox if you wish to export the file with *column headings,* and then *Browse* to your *Output folder.*



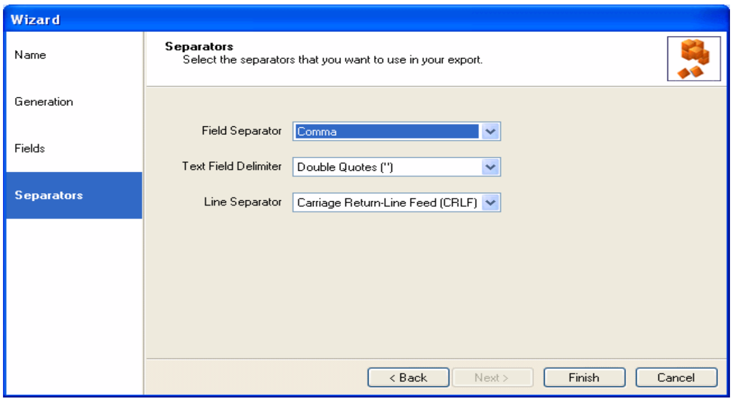
Fields

In the Fields page of the Wizard, from the *Available Fields* section, select and double click on the data fields to be exported, to display them in the *Field* section on the right. You can create any necessary calculations as required.



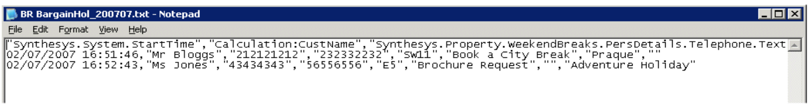
Separators

The *Field separators* (‘Tab’, ‘Semicolon’ or ‘Comma’), *Text Field Delimiters* **(**‘None’, ‘Double Quotes’, ‘Single Quotes’) and *Line Separators* (CR,LF, CR, LF) are selected in the **Separator** page of the Wizard.



Click **Finish,** to display the configured File Output Action in the Webflow design area and to create a file for the Webflow action in the Output folder on the .Net server.

The Output file, which can be viewed in the selected Output folder on the .Net server, will hold the call information collected in the Web Browser, when running a Webflow.



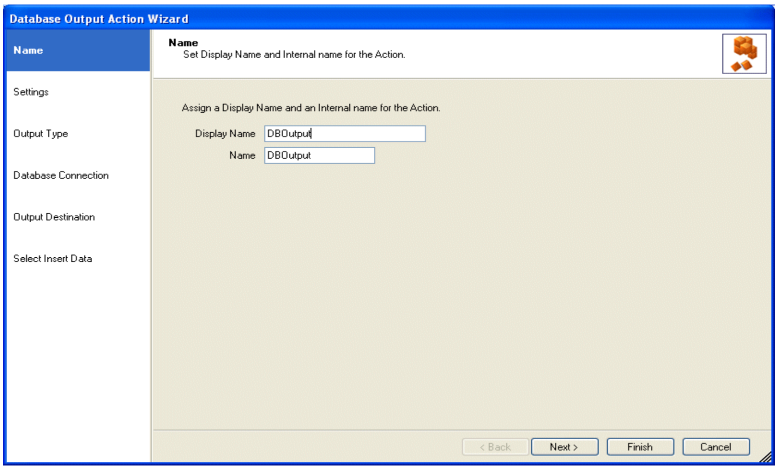
Database Output Action

The Database Output Action in the Synthesys Interaction Studio allows users to export data from a web call into a selected database, using the available *Insert* and *Update* options or running stored procedures.

Users running a data export to another machine must enable the MSDTC (Microsoft Distributed Transaction Coordinator) on the target machine, as well as creating a System DSN to the target database on the Synthesys server'.

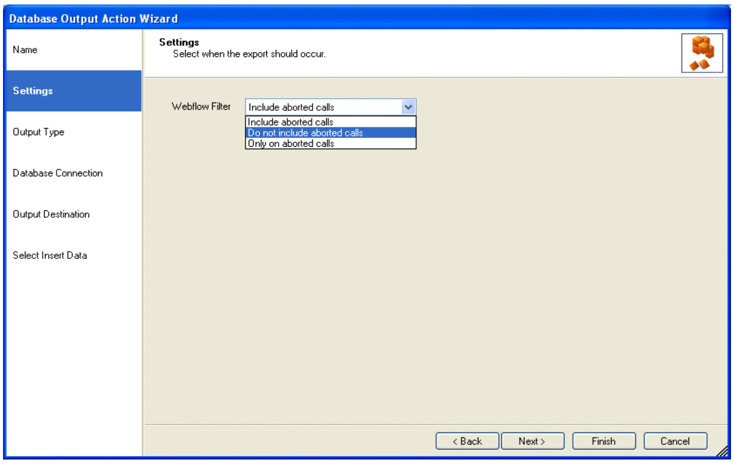
Database Output Name

Enter a name for the output action in the first page of the *Database Output* wizard.



Settings

From the *Webflow Filter* option in the Settings page of the Wizard, select if the DB output that you generate should include aborted calls or not, or aborted calls only.



Output Type

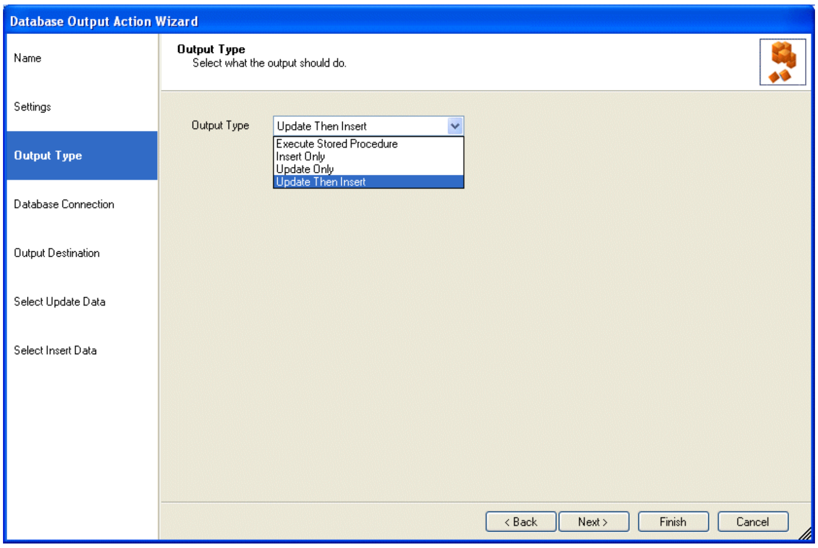
From the *Output Type* drop down menu in the Output Type page of the wizard, select the method of DB output action to be used. The options available are:

Option	**Select to**
Execute Stored Procedure	use a SQL statement to run the output action, for example to insert and update multiple records or records in multiple tables
Insert Only	insert single records into a designated database
Update Only	update single records in a designated database, defining key fields in the *Database Output Action*.
Update Then Insert	update and/ or insert single records in the designated database defining key fields in the *Database Output Action*.

*When the required Output type is selected, the associated options of either '**Select Insert Data', 'Select Update Data', 'Select Insert Data** and **Select Update Data'** or '**Select Procedure Data'** are displayed in the left section of the Database Output Action wizard.*

Example: Update Then Insert

On selecting '*Update Then Insert*' in the Output Type page of the wizard, the associated options *'Select Update Date'* and *'Select Insert Data'* are displayed in the left section of the wizard.



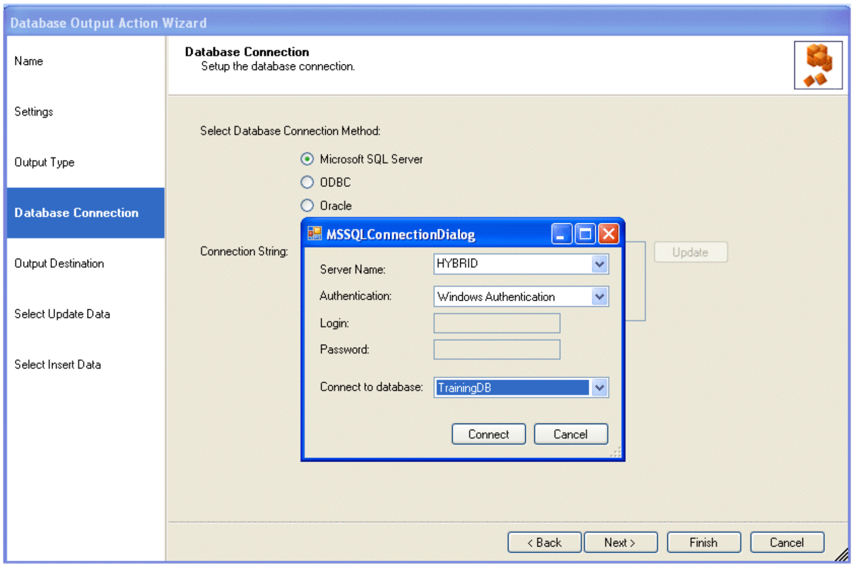
The options displayed in the left section of the wizard reflect the *Output Type* selected.

Database Connection

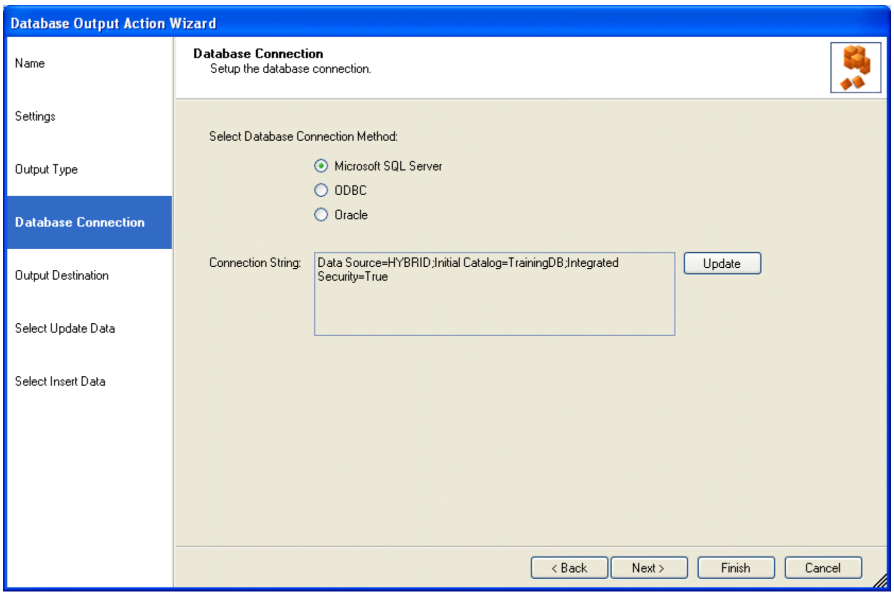
In the Database Connection page of the wizard users specify the connection method, i.e. **Microsoft SQL Server Driver, DSN** or **Oracle Driver.**

1. Click the **Update** button and in the *DB Connection Dialog* subsequently displayed, select the name of the ***Server.***

2. ***Next***, choose the required ***Authentication,*** enter the ***Login*** and ***Password*** details as required and select the **Database** to which you want to connect.



When the required ***Connection string*** is displayed in the *Database Output Action* dialog, click *Next*, to move to the next page of the wizard.

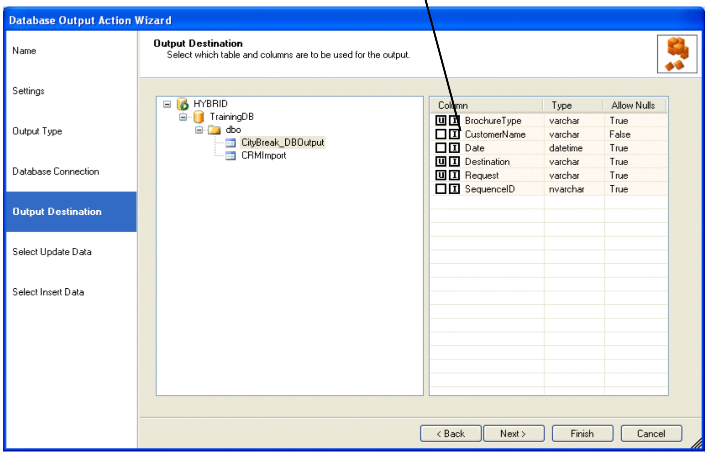


Output Destination

In the *Output Destination* page of the wizard users select the destination database table for the export and the columns to be used for the output action.

As we are using the output type *Update Then Insert*, we need to select both, the *Update* and the *Insert* columns that we wish to use.

*Selected **Update** columns display **U** in the selected box, selected **Insert** columns **I**.*



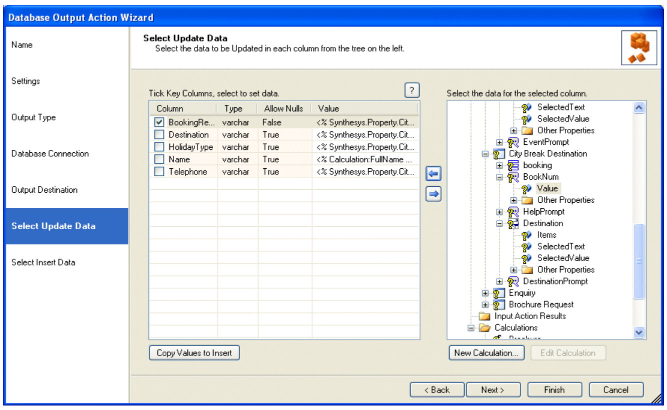
In the next page of the wizard we need to define the data for the selected *Update* and *Insert* columns.

Select Update Data

The data for the *Update* is moved from the *Select the data for the selected column* on the right to the relevant destination column on the left, using the blue arrow.

Tick the key columns/ primary key fields for the output action, before moving to the next page of the wizard.

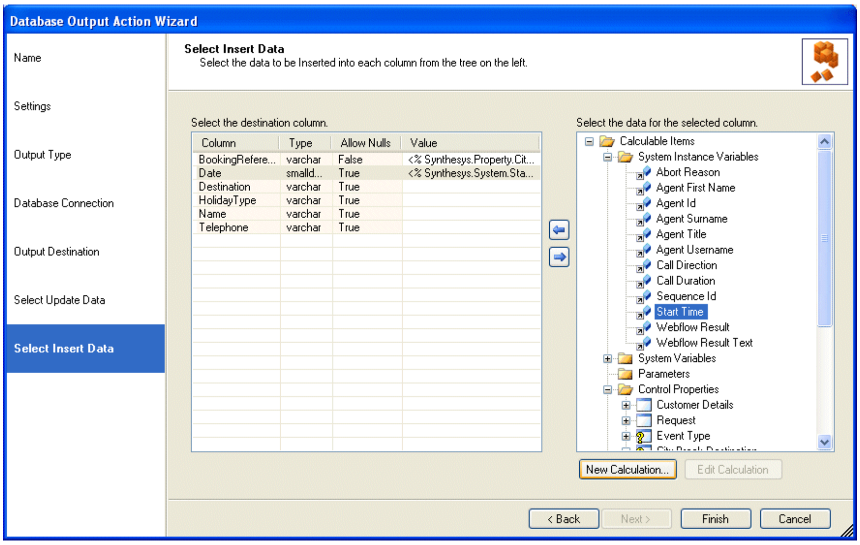
In our example, the key column that we have ticked is the 'Booking Reference'. This will now act as a filter to update records in the other columns displayed, but not ticked.



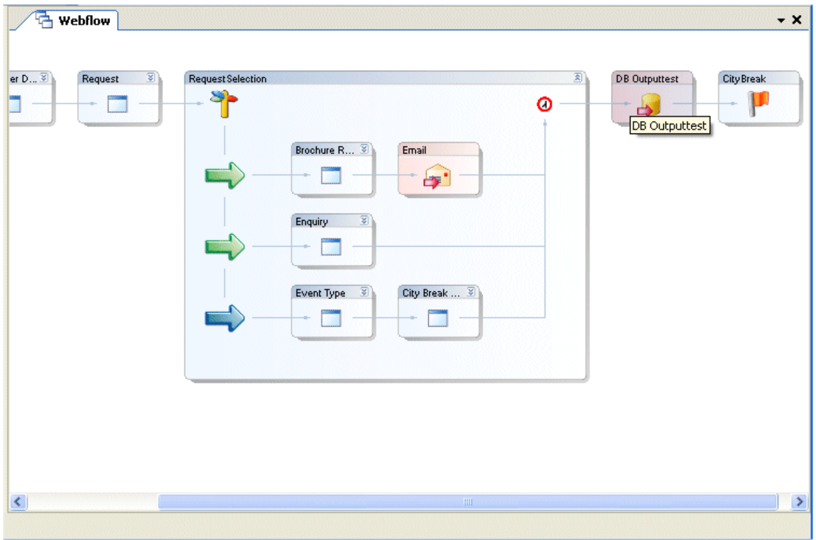
Select Insert Data

In this page of the wizard, select the required data fields for the *Insert*.

Again, move the data from the *Select the data for the selected column* on the right to the relevant destination column on the left, using the blue arrow.



Click **Finish**, to display the configured DB output action in the webflow design area.



The selected call information, as collected in the Web Browser when running a Webflow, will subsequently be exported to the destination Database, inserting or updating records as specified.

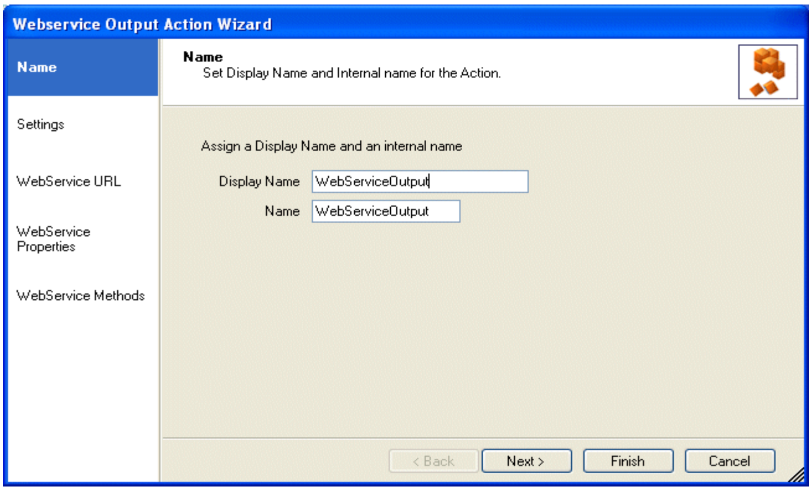
Web Service Output Actions

The Web Service Output Action enables connection to a web service in order to export data from a Synthesys webflow at runtime.

In the Synthesys Interaction Studio, select Web Service Output Action from the Core Actions part of the Toolbox and drop it at the desired part of the Webflow.

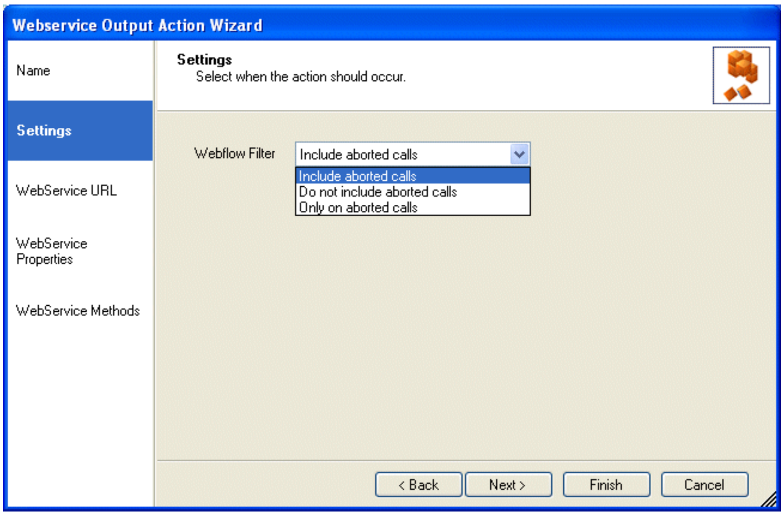
Name

The first page of the *Web Service Output Action Wizard* prompts you to enter a name for the Web Service Output Action.



Settings

In the *Settings* page of the Wizard, under the **Webflow Filter** option, you can select if the output that you generate should include aborted calls or not, or aborted calls only

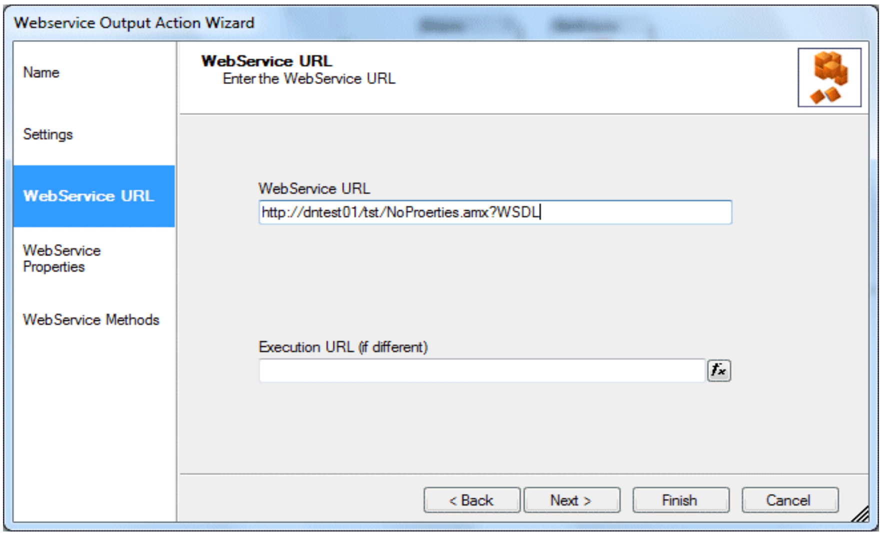


WebService URL

In the Web Service URL part of the wizard, enter the details of the web service that you wish to call.

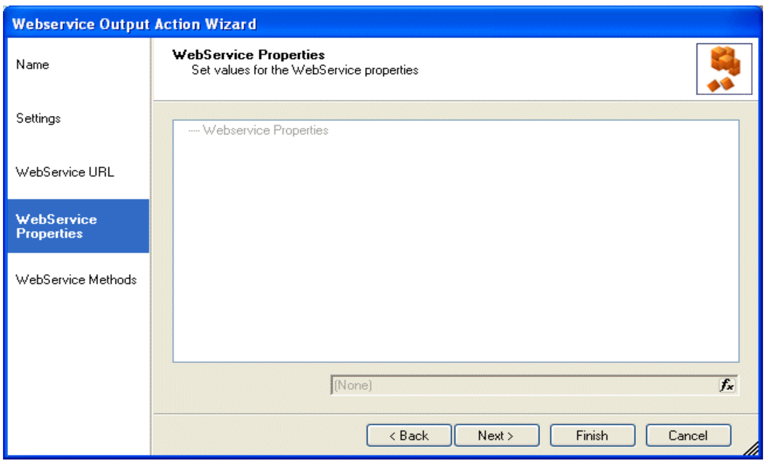
If the URL that is used at runtime is different to that used at design time when taking test calls, then you can enter or calculate the *Execution URL* into the Execution URL field.

Ensure that the URL is set correctly, as otherwise the web service action will fail at run time.



WebService Properties

This page will display any properties that are available from the web service, and allows the user to set the values to be sent to the properties.

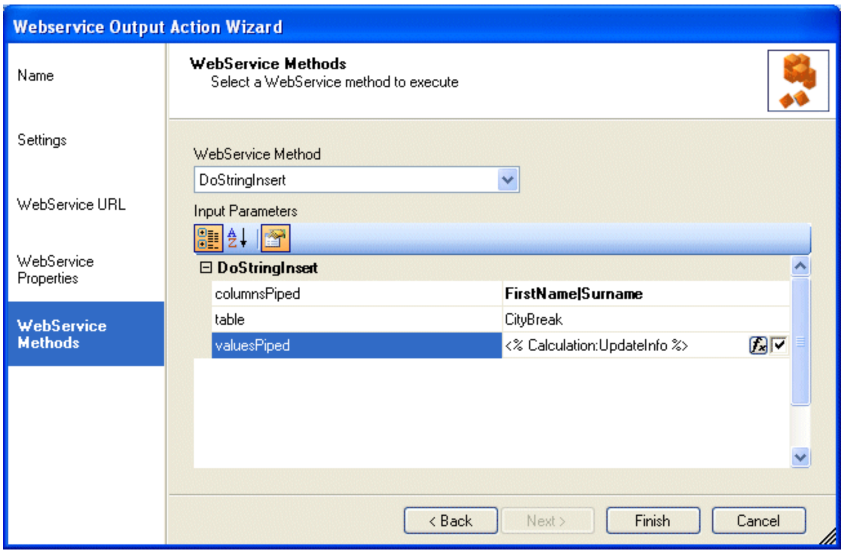


Web Service Methods

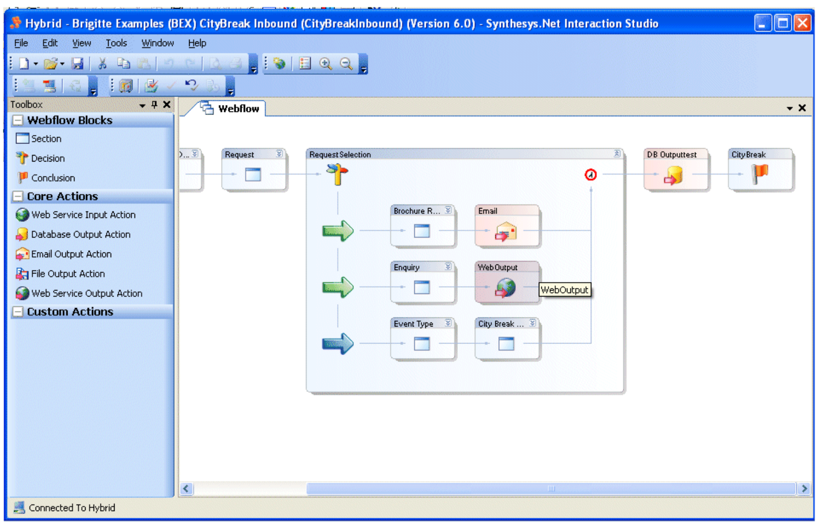
The *WebService Methods* page displays the methods that are available from the web service and allows users to specify any data that is required for these methods.

1. Select the web service method that you wish to call from the drop down list to display the corresponding parameters available for this method.

2. Next, set the values to be passed to each parameter. These can be hard coded or you can set a calculation using the calculations icon, to make the parameter dynamic.



Click **Finish**, to display the configured Web Service output action in the webflow design area.



SYNTHESYS

INPUT ACTIONS

Web Service Input Action

SYNTHESYS INPUT ACTIONS

Web Service Input Action

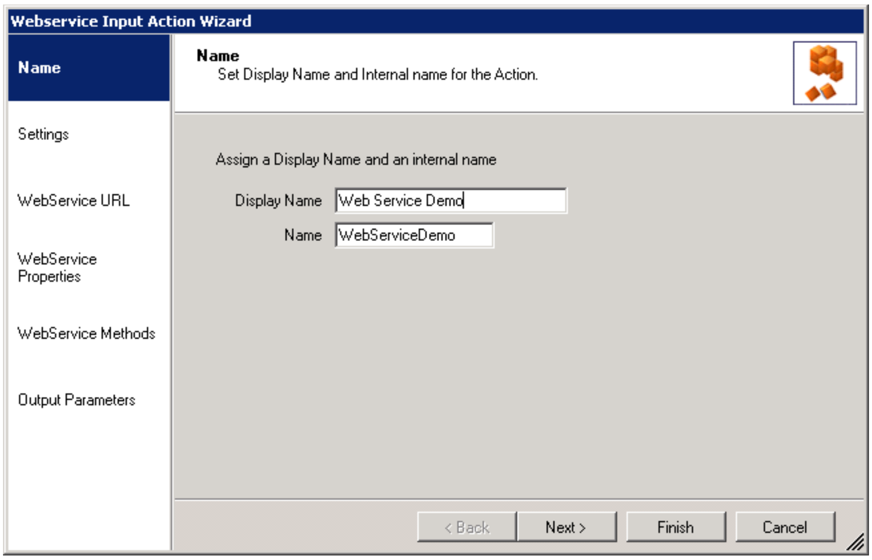
The Web Service Input Action enables connection to a web service in order to return data for use in a Synthesys webflow at runtime.

The speed at which the data is returned depends on the speed of the external data source that the input action is attached to. Synthesys has been configured to display the message '**Retrieving Data From External Source has timed out – please retry'**, if no data has been returned within 5 seconds. Pressing 'Retry' will eventually return the required data.

In the Synthesys Interaction Studio, select Web Service Input Action from the Core Actions part of the Toolbox and drop it at the desired part of the Webflow.

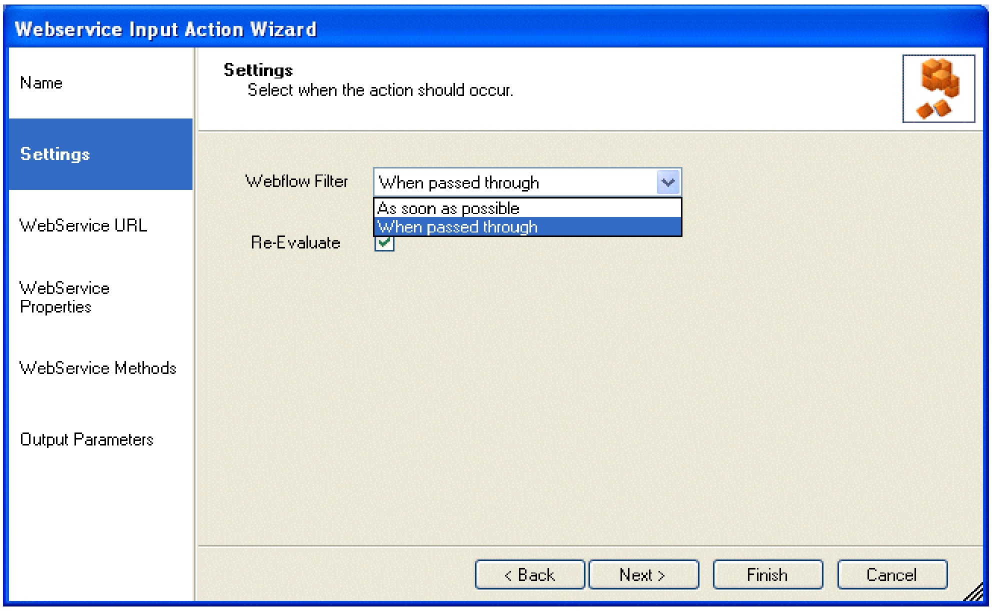
Name

The first page of the *Webservice Input Action Wizard* prompts you to enter a name for the Web Service Input Action.



Settings

In the *Settings* page of the Wizard, under the **Webflow Filter** option, you can choose to make the web service request as soon as the parameters (set later) are available, i.e. ***"As soon as possible***", or to make the request to call the web service "***When passed through"***, i.e. when the agent passes through the input action (which is invisible to the agent) in the webflow.



Option	Used
As soon as possible	to make a request to the web service as soon as the parameters are available. If the web service is only likely to be invoked once within a webflow, it is more efficient to call the web service as soon as possible, to ensure that the data is returned to the webflow and available to the agents as soon as possible, avoiding possible delays due to slow response of the web service.
When passed through	to make a request to the web service when the agent passes through the input action in the webflow. If the same web service is likely to be invoked more than once in the webflow, this option is preferable, to avoid returning invalid data to the webflow. Ticking the *Re-Evaluate* checkbox, the web service can be called multiple times, and agents navigating backwards and forward in the webflow can send new data in the parameters to return different data, if required.

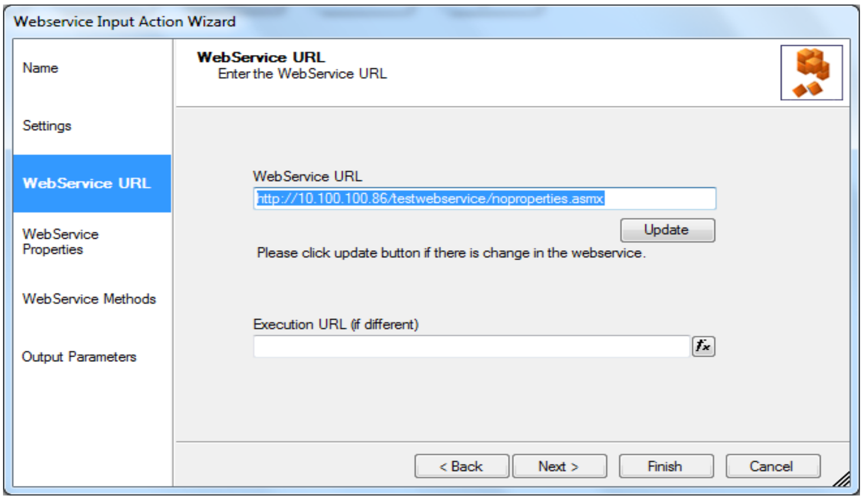
WebService URL

In the WebService URL part of the wizard

- Enter the details of the web service that you wish to call into the ***WebService URL*** field.

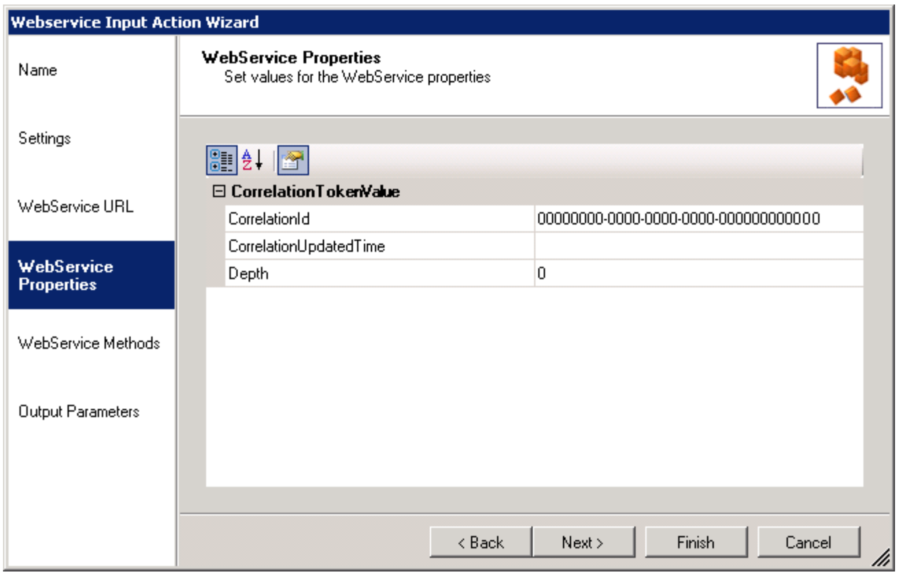
If the URL that is used at runtime is different to that used at design time when taking test calls then, additionally, you can enter or calculate the *Execution URL* into the Execution URL field.

Ensure that the URL is set correctly, otherwise the web service action will fail at run time



WebService Properties

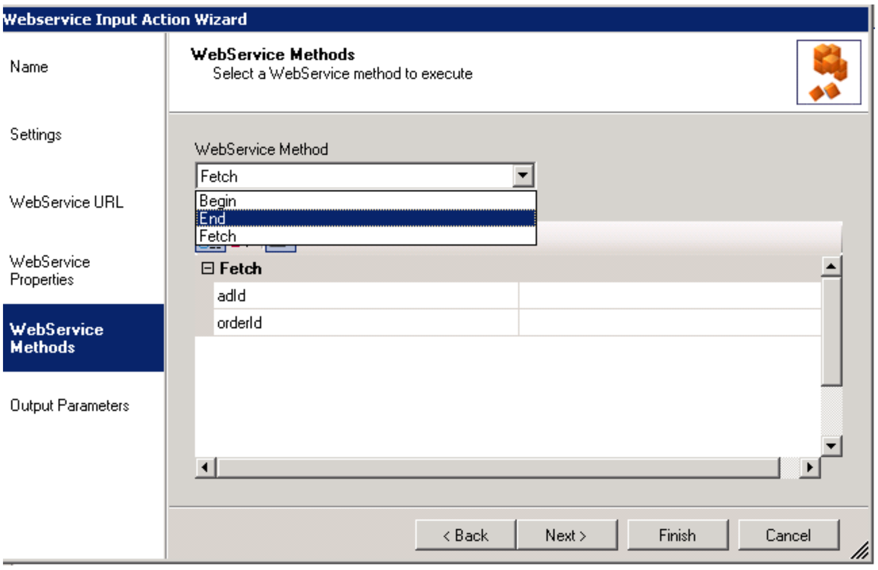
This page will display any properties that are available from the web service, and allows the user to set the values of these properties.



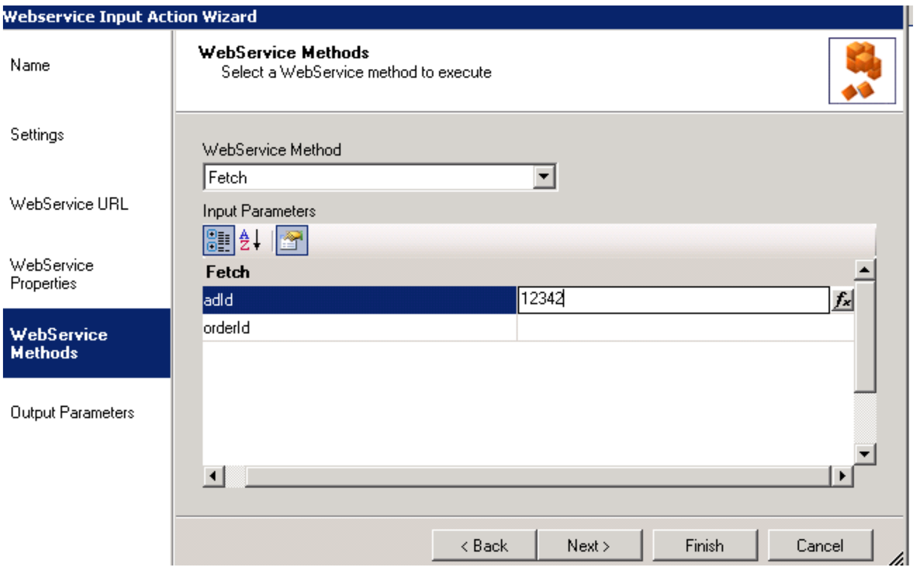
WebService Methods

The *WebService Methods* page displays the methods that are available from the web service and allows users to specify any data that is required for these methods.

1. Select the web service method you wish to call from the drop down list, to display the corresponding parameters available for this method.



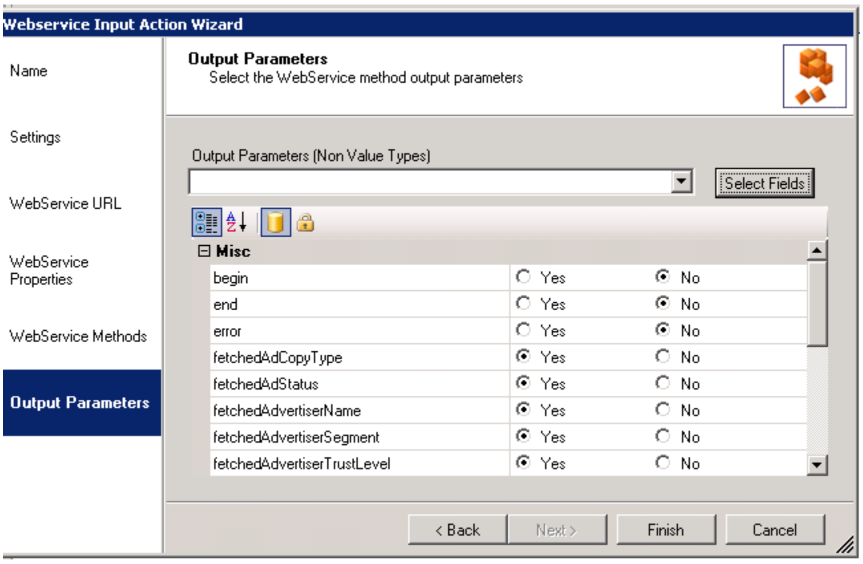
2. Next, set the values to be passed to each parameter. These can be hard coded or you can set a calculation using the calculations icon, to make the parameter dynamic.



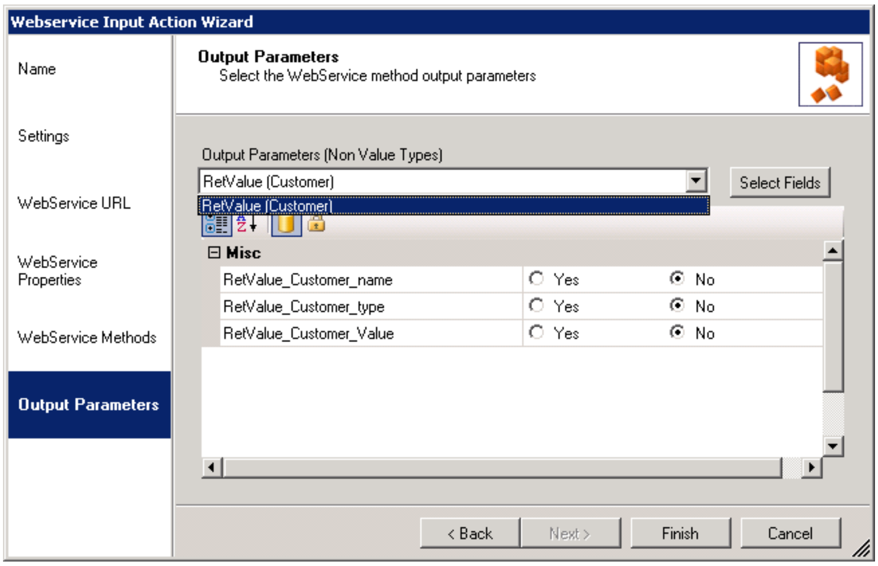
Output Parameters

This page will display any Output parameters that will be returned as a result of calling the web service.

Within this interface you can set which pieces of data get stored in the Synthesys database as part of the webflow data. Simply set the radio to ***Yes*** to store the data or ***No*** to not store the data.

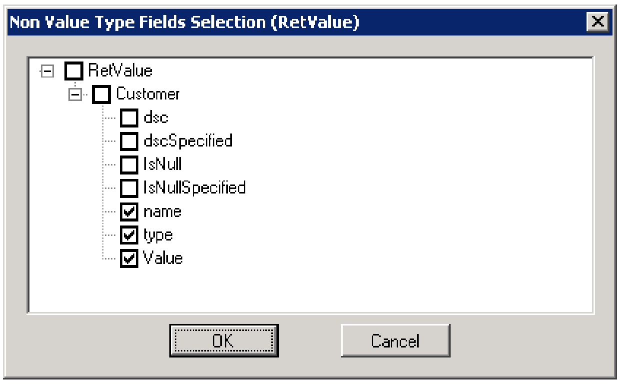


To manipulate individual elements of any complex-type output parameters returned by the web service, *select* the name of the *complex-type parameter from the drop down list.*

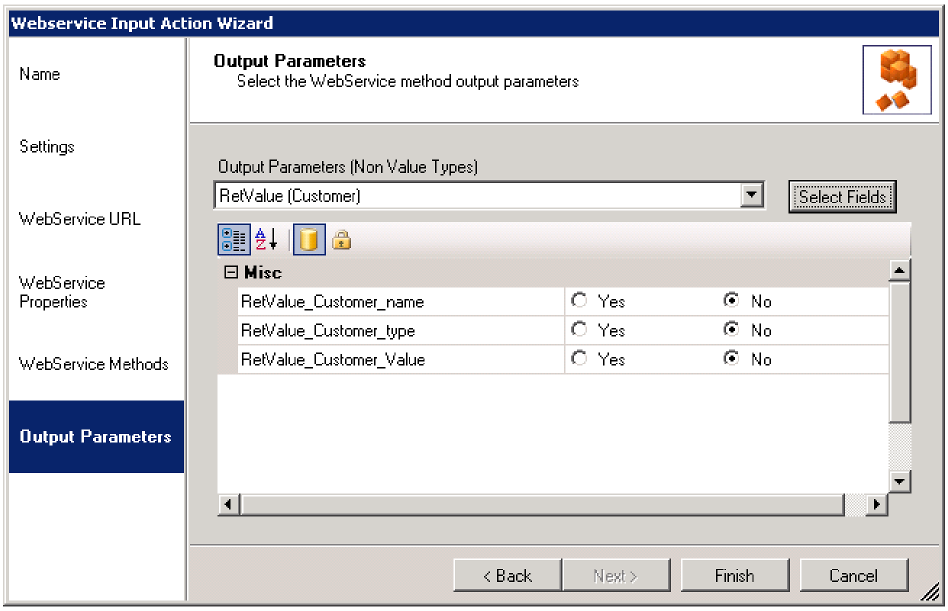


Next, click the ***Select Fields*** button.

In the ***Non Value Type Fields Selection*** dialog, select any parameters that need to be stored in the database or are required in the webflow.



They will then be added to the list of output parameters as below.



Requirements of the Web Service:

1. *The web service must be accessible from the Synthesys application server.*
2. *The web service must only contain Simple Properties, i.e. Int, String, Date etc. Complex custom types are not yet supported.*
3. *Arrays are not currently supported as output parameters.*

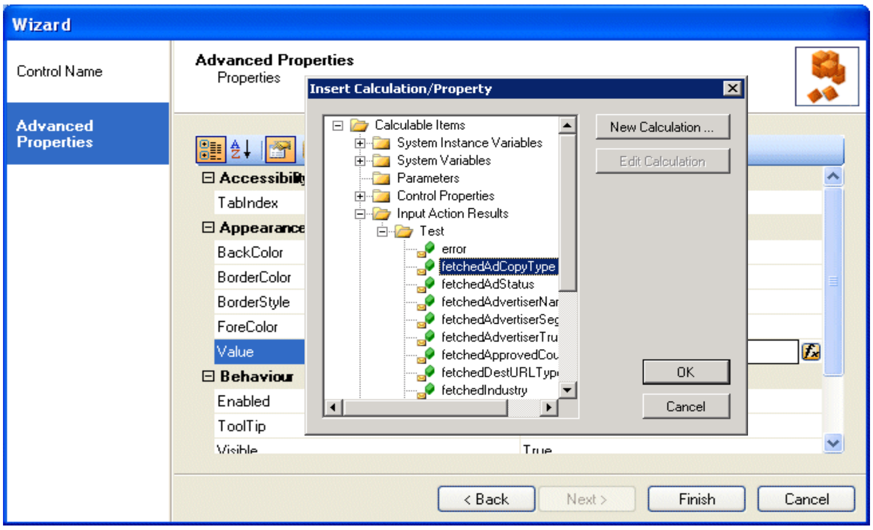
Returning Data from the Web Service to Web Controls

The data that is returned to the web service is stored in the output parameters of the web service.

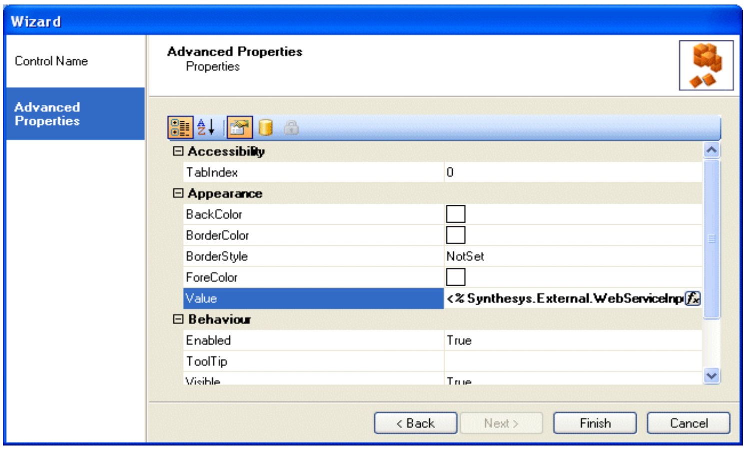
To display information from the *Web Service Input Action* in your webflow, ***drop a web control***, for example a *Memo* control, into a ***section* after** the *Web Service Input Action.*

In the ***Advanced Properties*** screen of the control, ***set a calculation*** to the property ***Value*** pressing the calculations icon. In the ***Insert Calculation/Property*** editor subsequently displayed, you can either

- select the value directly from the **Input Action Results** directory, or
- create a calculation to format the data to be displayed.



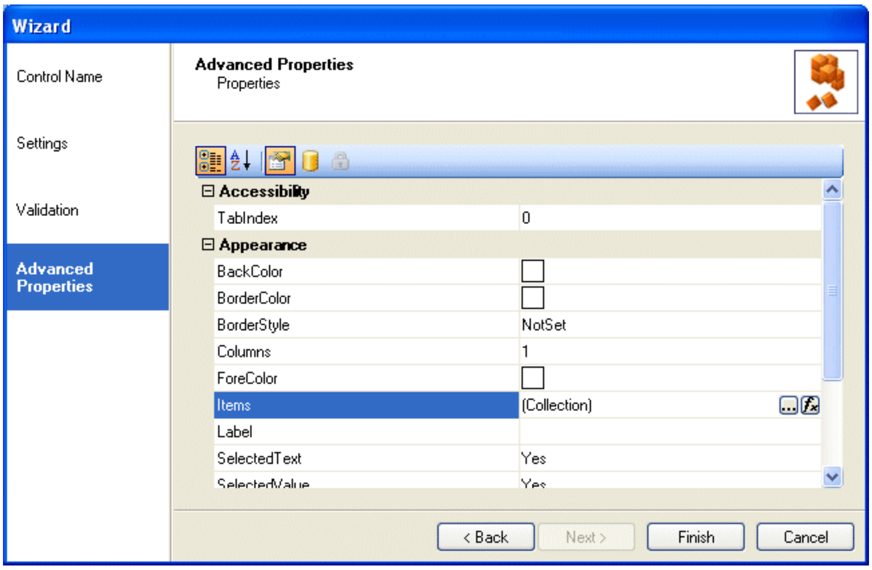
Press OK to update the *Advanced Properties* page and then Finsh.



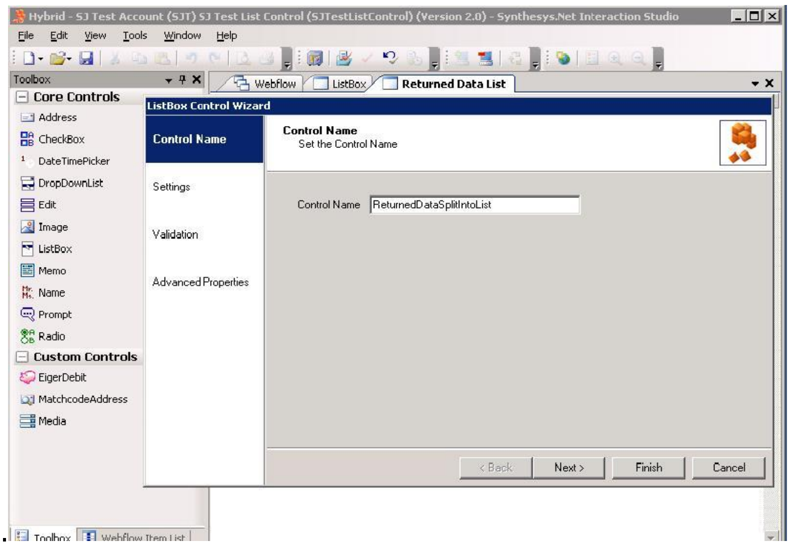
Returning Data from the Web Service to List type Web Controls

If you wish to return the data into a list type control, for example a ***Radio, Checkbox, Drop Down list or List control***, the property that needs to be set is ***Items.***

The ***calculation type*** has to be a ***ListItemCollection.*** If you receive the data as a comma separated string, a calculation must be written, to reformat the data as a list item collection.

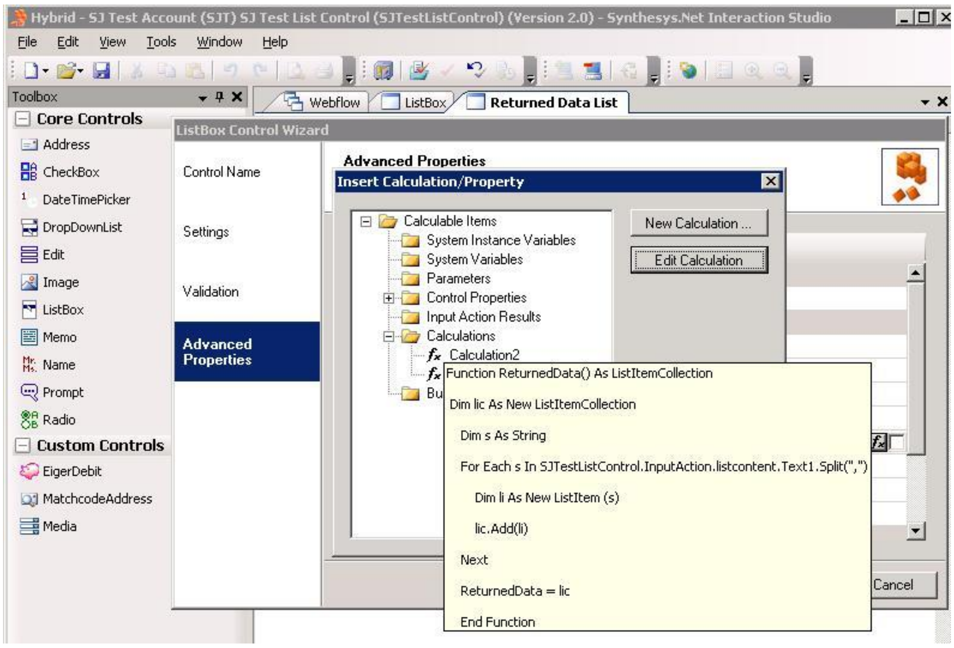


Once the data has been returned into the Webflow, add a ListBox to the Webflow.



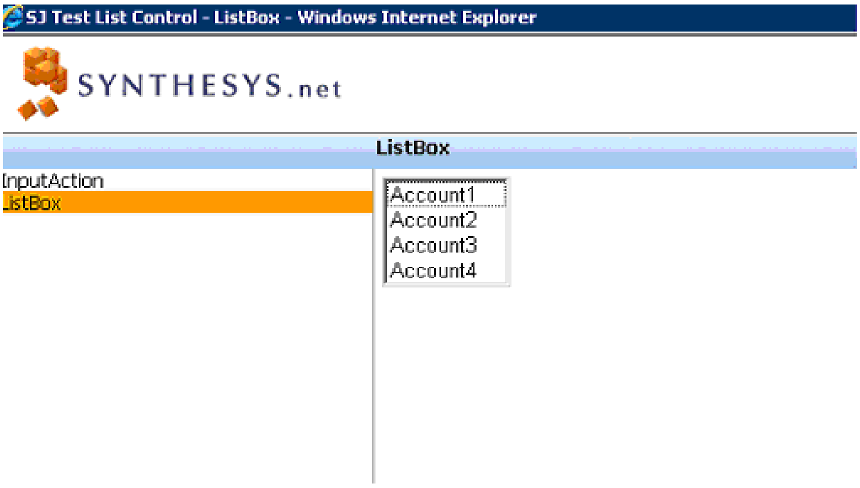
Create a ***calculation*** to reformat the ‘data comma separated string’ to a ‘***List Item collection’.***

Example of Calculation to Convert Comma separated string to a ListBoxItem:



The Calculation once added will convert the returned data into a List.

In the Synthesys Protal, the data returned from the Web Service is subsequently displayed in a ListBox in the Webflow.



The speed at which the data is displayed depends on the speed of the external data source used by the customer. If no data is returned within 5 seconds, a message will inform users that 'Retrieving Data From External Source has timed out – please retry'.

Agents can press 'Retry' and eventually the required data will be returned.

PUBLISHING WEBFLOWS

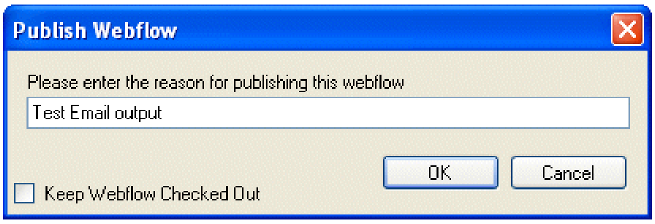
Before you can test your Webflow in the Web browser, you must publish the Webflow.

To publish a Webflow, you need to be connected to the server and you must have the Webflow checked out.

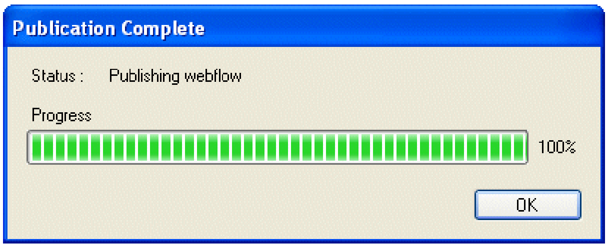
Go to **File – Publish** or use the Publish icon to open the Publish Webflow dialog.

Enter a reason for publishing the Webflow and click OK. The entries will be recorded on the Webflow Version Control page.

If you wish to continue to edit the webflow after publishing it, tick the option ‘Keep Webflow Checked Out’.



Once the Progress bar shows that the publication is 100% complete, click OK.



If publishing the webflow should fail for some reason, a message dialog will be displayed, providing further information.

When the webflow is successfully published, the version number will go up to the next full number, from Version 1.3 to Version 2.0 or from Version 2.1 to Version 3.0

WEBFLOW VERSIONS

In the *Webflow Version Control* dialog users can access comments that were entered on publishing webflows, check in webflows and check out an earlier version of a webflow.

Every time a Webflow is checked in, the version number will increase by 0.1, i.e. from Version 1 to Version 1.1; 1.2; 1.3 etc.

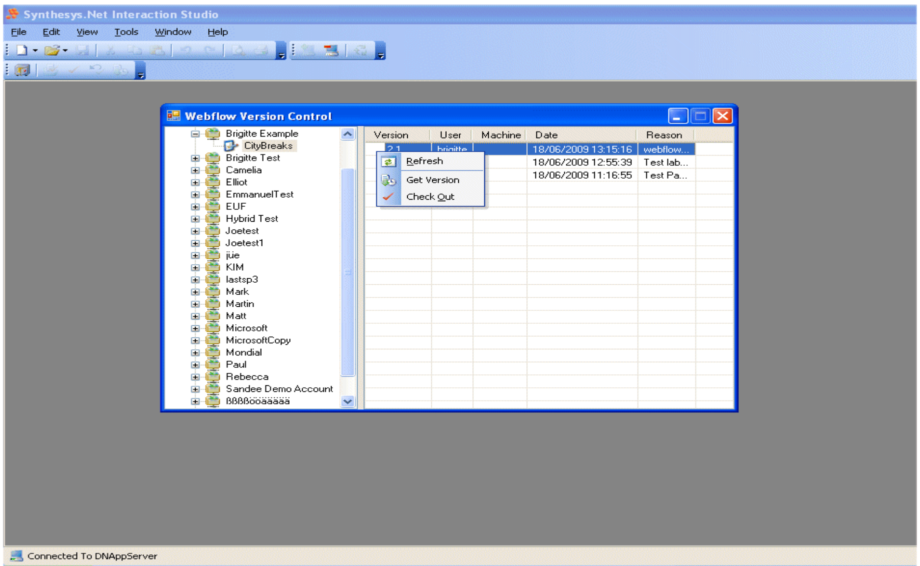
When publishing a Webflow, the version number will go up to the next full number, from Version 1.3 to Version 2.0 or from Version 2.1 to Version 3.0

In the Synthesys Interaction Studio, connect to the server and then go to **File** on the menu bar and select **Version Control**.

In the *Webflow Version Control* dialog, select a webflow, to display the associated version details on the right hand side.

Right click on a *Version* number, to display the following options:

Refresh	Update the list of published versions
Get Version	to open the selected version of the webflow to view
Check Out	to check out the selected version of the webflow to edit



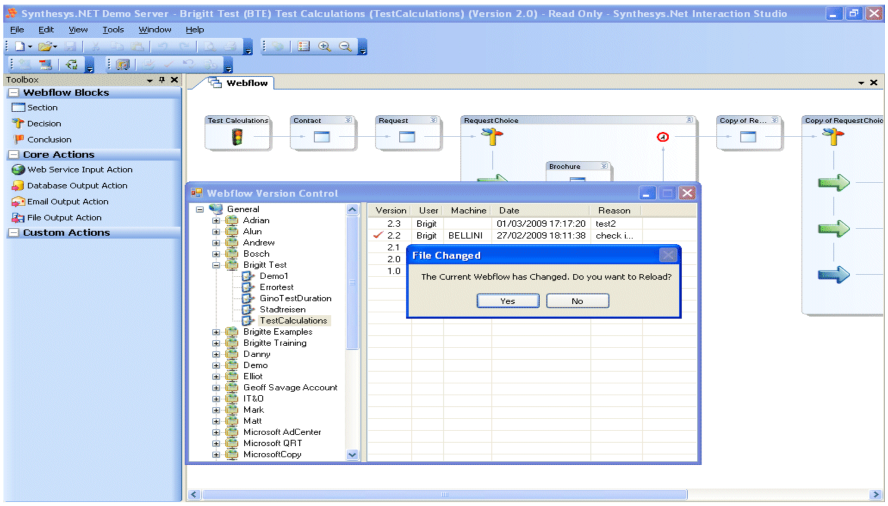
Selecting the webflow version that you wish to view or edit will <u>not</u> automatically open the webflow.

To open the selected version of the webflow go to: File / Open / Synthesys Webflow.

Checking out a previous Webflow Version

To check out an earlier version of a currently open webflow, right click on the version that you wish to check out and select the **Check Out** option.

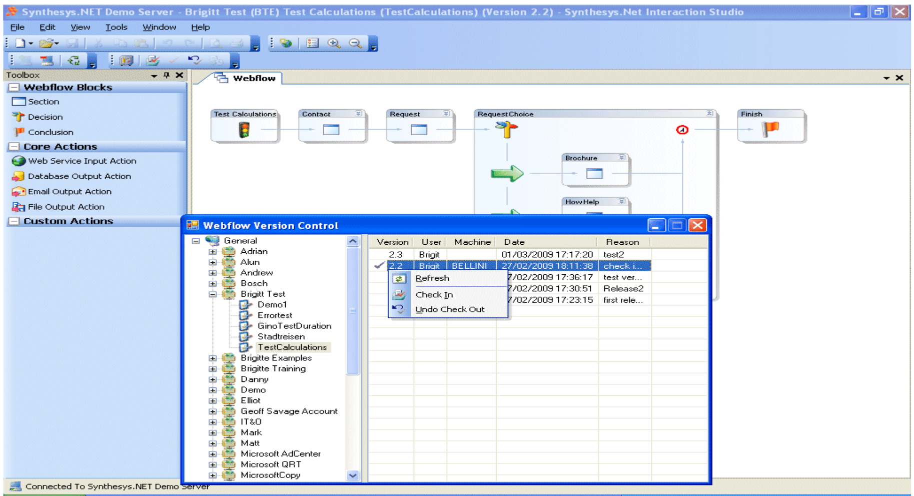
Click **Yes** to the message: ‘The Current Webflow has Changed. Do you want to Reload?’



The selected version of the webflow will open.

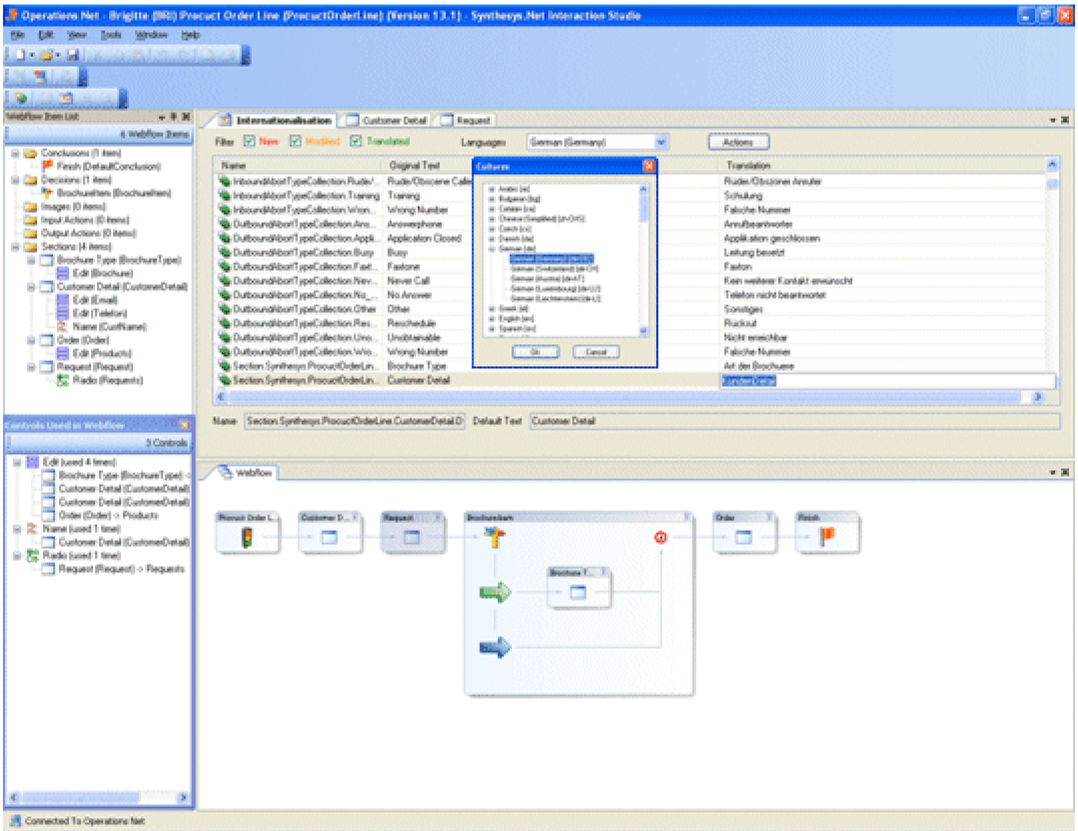
If you right click on the version of the checked out webflow, you can select:

Check In	to check the weblow in immediately or after editing
Refresh	to refresh the list
Undo Check Out	to undo the check out action



When the webflow is checked in again, the version number will increase by 0.1, from 2.3 to 2.4. When publishing the webflow the version number will go up to the next full number, version 3.0

SYNTHESYS TRANSLATION TOOL



THE SYNTHESYS TRANSLATION TOOL

The **Synthesys Translation Tool** forms part of the *Synthesys Interaction Studio* and is used to translate webflow information into a target language.

To access the ***Translation Tool,*** you need to:

- Click on the *Synthesys IDE* icon  on your desktop.

3. In Synthesys Interaction Studio, go to ***File / Connect***, to connect the Interaction Studio to a Synthesys server.

- Click the ***Synchronise***  icon, to synchronize the client machine with the server, to pick up the latest updates.
- ***Open and check out*** the Synthesys webflow that you wish to translate.
- Click on the ***Translation Tool***  icon, to access the **Internationalisation** screen.

If no server is displayed, click **Servers** in the *Connect* window and then the **Add** button, to enter a server name and to connect to the server.

If the webflow that you wish to translate is already checked out on another machine, it needs to be checked in by the listed user, on the named machine, before you can check it out.

It is recommended that you check in your webflow, before exiting the Synthesys Interaction Studio, to ensure that the webflow can be accessed for editing on another machine and/ or by other users.

Understanding the Internationalisation Screen

Having opened and checked out your Synthesys webflow:

- Click on the ***Translation Tool***  icon, to open the **Internationalisation** screen.

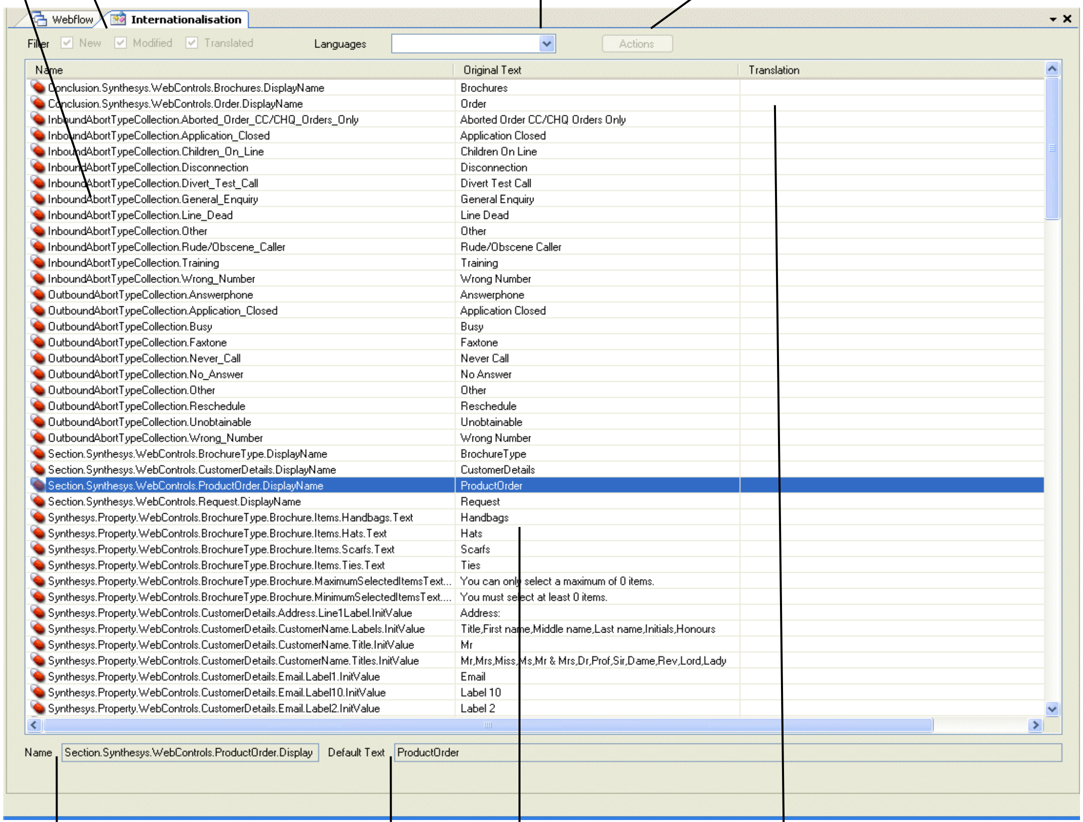
This view shows all translatable elements of the selected webflow.

Filter *to display New*, *Modified* and *Translated* items

Languages drop down box

Actions to access *Import* & *Export* options

Names of webflow screens and controls



Name shows name of selected web screens & controls

Default Text shows the original text, selected for translation

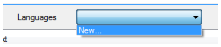
Original Text fields

Translation fields for entering translated text

Please see next pages for information about *Setting Translation Language* and *Webflow Translations*.

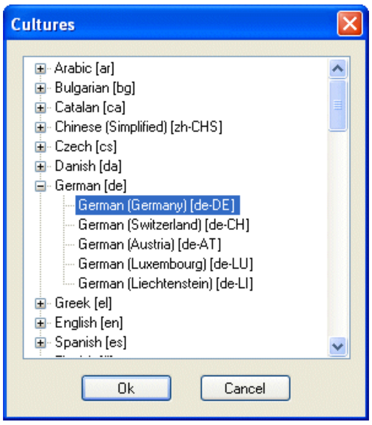
Setting Translation Language

To start the translation process, you must first define a translation language in the ***Internationalisation*** page of the Synthesys Interaction Studio.

- Click on the arrow of the **Languages** drop down menu 

and select ***New .***
- In the **Cultures** dialog subsequently displayed, choose the language that you wish to use for the translation of the selected webflow**.**

If a Cultures dialog box does not appear, check that that the webflow is checked out.



- Press Ok to select the language and to start a new translation

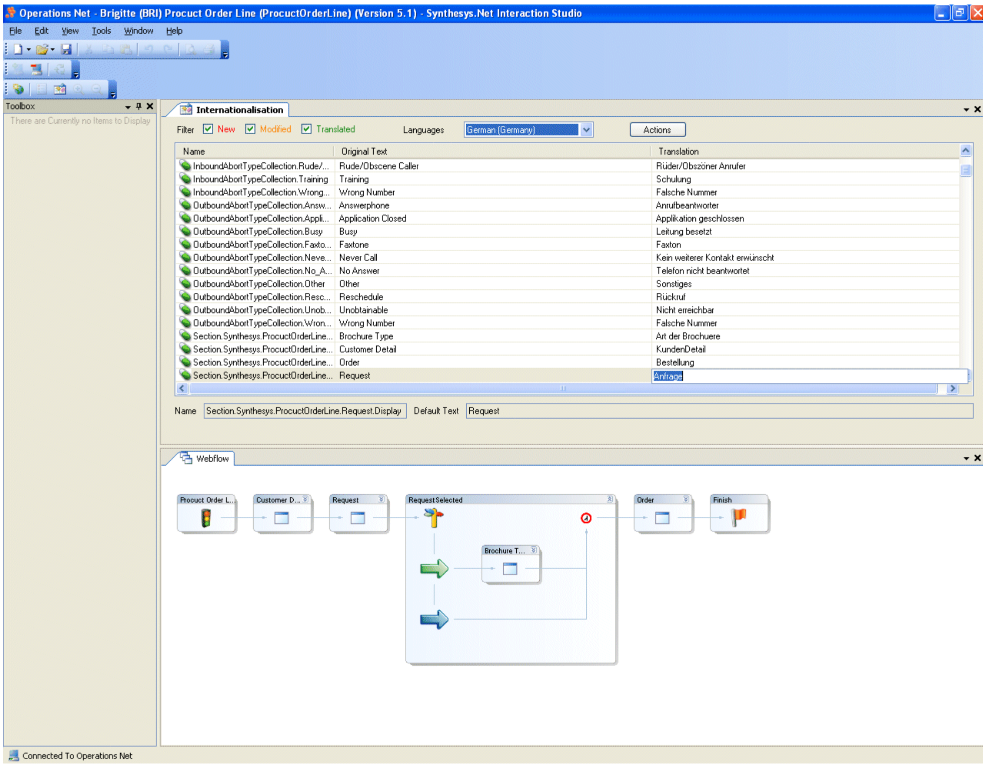
For more information, please see next page.

Starting the Webflow Translation

Having opened and checked out the webflow to be translated in the *Synthesys Interaction Studio* and set the target language for the translation in the ***Internationalisation*** screen, you can now start your translation.

- Select the text that you wish to translate in the **Original Text** column.
- Click your left mouse button into the adjacent field in the **Translation** column.
- Enter the translated text, as required.

When translating items from a comma separated list, ensure that you enter the same number of values as are in the original list (i.e. Title,FirstName,Surname etc).



Save and publish the webflow, before opening the ***Synthesys Portal*** in the *Web Browser*.

Test different language translations, by setting the language preference, as required in the Web Browser (*Tools – Internet Option – Languages*)

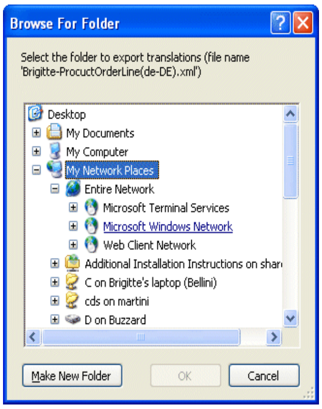
Import / Export File Actions

Using the ***Import / Export*** options, available via the **Internationalisation** page in the *Synthesys Interaction Studio,* you can import or export translation xml files.

To start the Import or Export:

- Click on the **Actions** button and select either ***Import*** or ***Export.***

- In the **Browse For Folder** dialog, locate the ***xml translation file*** that you wish to import, or select the destination folder for your export.
- If required, you can click the ***Make New Folder*** button and create a new folder in which to ***store your xml* export file**.

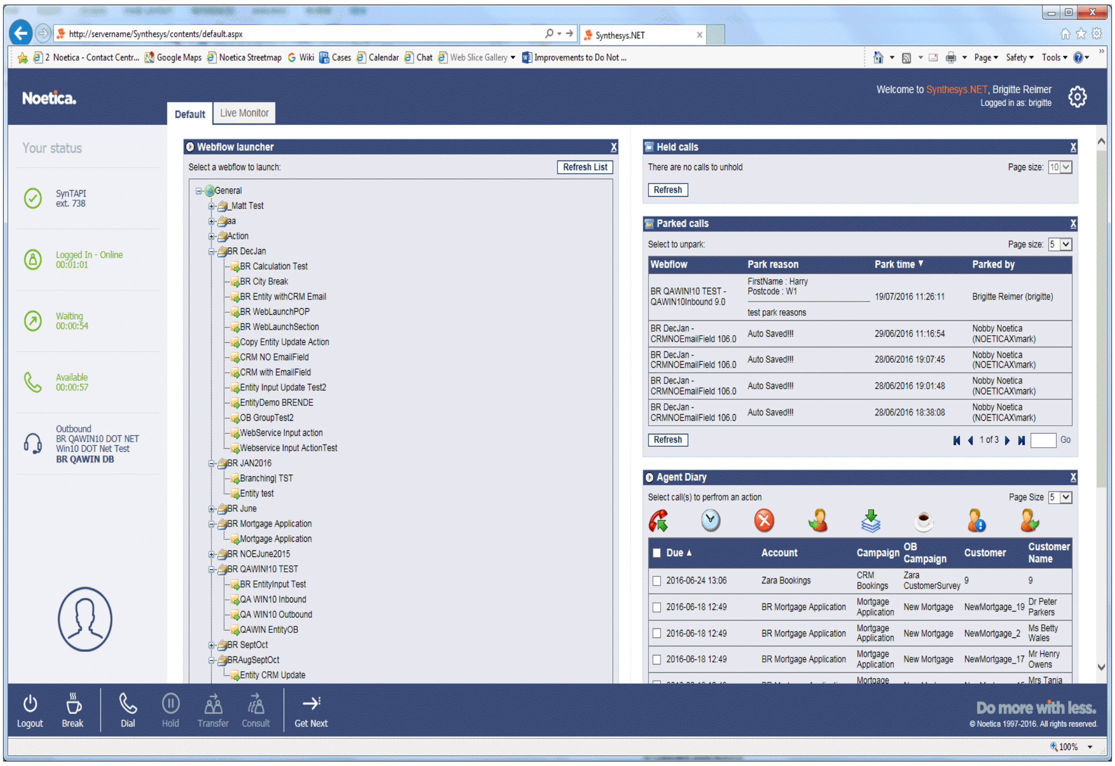


- Press **Ok** to import/ export the *translation xml file.*
- Press **Cancel** to cancel the action.

```
<?xml version="1.0" encoding="utf-8" standalone="yes" ?>
- <Webflow Account="Brigitte" Webflow="ProcuctOrderLine" Version="13.4" xmlns="urn:i18nexportfile-schema">
 - <Translations Locale="de-DE">
  - <Translation Source="Header">
     <Name>InboundAbortTypeCollection.Application_Closed</Name>
     <OriginalValue>Application Closed</OriginalValue>
     <TranslatedValue>Applikation geschlossen</TranslatedValue>
    </Translation>
  - <Translation Source="Header">
     <Name>InboundAbortTypeCollection.Divert_Test_Call</Name>
     <OriginalValue>Divert Test Call</OriginalValue>
     <TranslatedValue>Abgeleiteter Test Call</TranslatedValue>
    </Translation>
  - <Translation Source="Header">
     <Name>InboundAbortTypeCollection.General_Enquiry</Name>
     <OriginalValue>General Enquiry</OriginalValue>
     <TranslatedValue>Allgemeine Anfrage</TranslatedValue>
    </Translation>
  - <Translation Source="Header">
     <Name>InboundAbortTypeCollection.Wrong_Number</Name>
     <OriginalValue>Wrong Number</OriginalValue>
     <TranslatedValue>Falsche Nummer</TranslatedValue>
    </Translation>
  - <Translation Source="Header">
     <Name>InboundAbortTypeCollection.Training</Name>
     <OriginalValue>Training</OriginalValue>
     <TranslatedValue>Schulung</TranslatedValue>
    </Translation>
  - <Translation Source="Header">
```

SYNTHESYS PORTAL

WEB BROWSER



THE SYNTHESYS PORTAL

Introduction

The access available to users in the Synthesys Portal depends essentially on the access permissions that have been assigned to the individual users.

Users with full Synthesys Portal rights will have permissions to manually launch and run all webflows, including permissions to park, hold, abort calls, open Web Help pages and will be able to view and retrieve parked and held calls and to add and configure new Web pages.

Other users may simply have the required permissions to take calls on selected Webflows, including permissions to park, hold, abort calls, open Web Help pages.

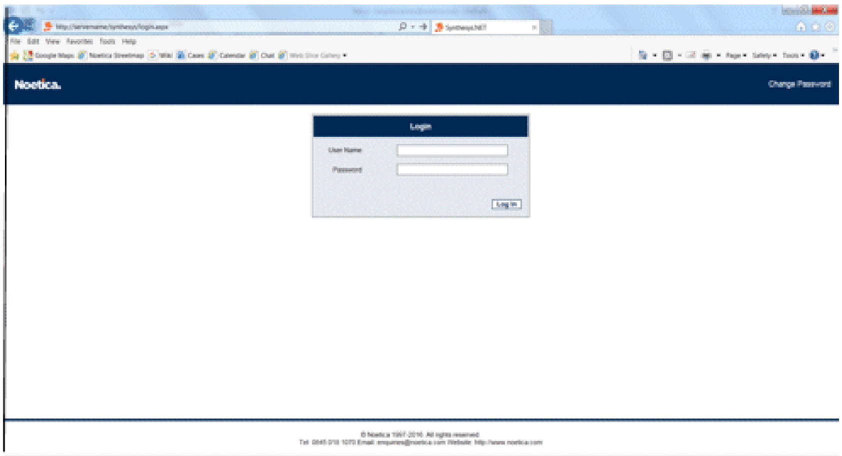
CONTENT

USER LOGIN

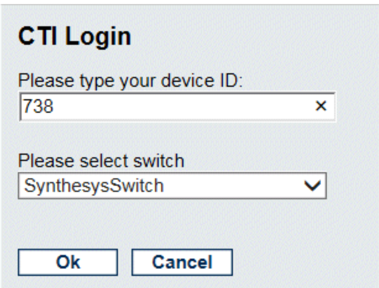
In order to run Synthesys Webflows, users need access to a Web Browser.

To access the Synthesys Portal to either your in-house server or an outside website, you need to enter the corresponding URL address into the Address field of the Web Browser.

The next step is to log on to the system.



- Enter your ***User Name*** and ***Password*** exactly as they have been set for you.
- Next, enter the extension number assigned to your workstation. This is to confirm that you are available to receive and take calls, which can now be routed to your workstation.



If you have not received the required URL address or your User Name and Password, please contact your System Administrator.

If Active Directory Integrated Authentication is used, the Login dialog will be skipped, as the logon page automatically detects and authenticates the username from Windows.

If the CTI Login is not displayed, contact your System Administrator.

THE AGENT PORTAL SCREEN

Having logged into Synthesys, the Agent Portal screen is displayed.

The appearance of the screen can vary, displaying different branding images and background colours, reflecting, for example, the branding used by your company.

*If no Web parts are displayed when an Agent logs on for the first time, go to the **Settings** icon at the top right of the Portal screen.*

*Select the **Catalog** option to pick up the Webflow Launcher and other web parts. Access to the web parts will depend on the permission level assigned to you.*

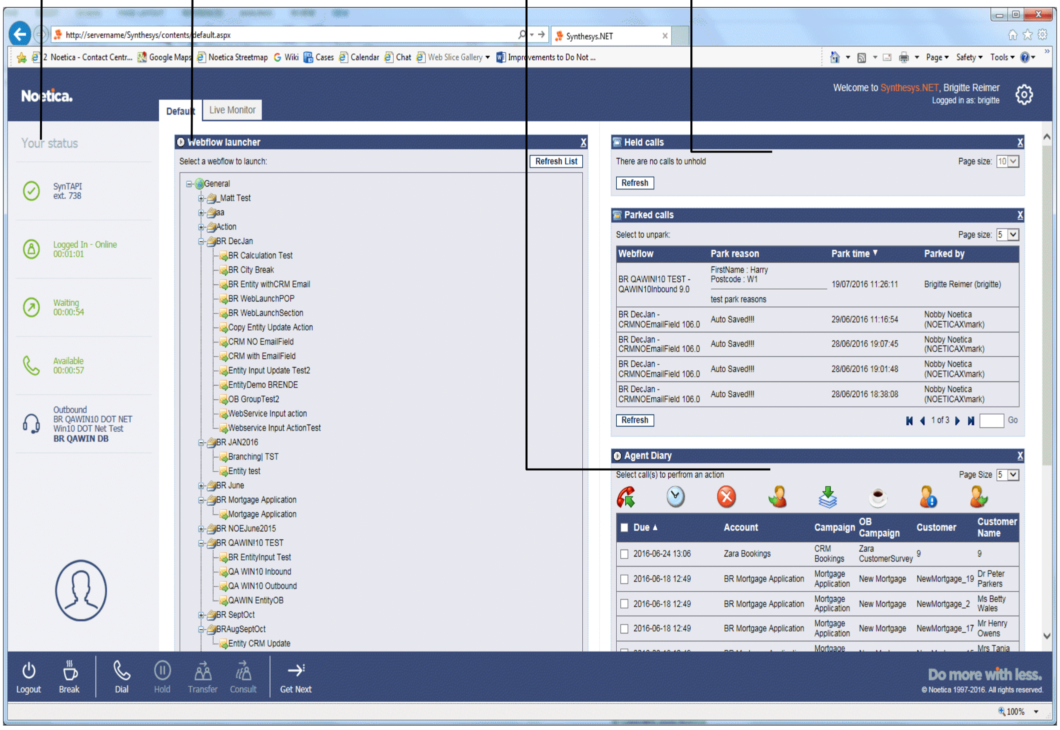
The Synthesys.Net Portal consists of the Agent Status bar, three main toolbars and a number of web parts, depending on the permissions assigned to the user.

***Agent Status bar**, showing Agent's log in status*

***Webflow launcher web part**, for manually opening webflows*

***Hold & Park web parts** for holding & parking calls*

Agent Diary *for managing sleeping/ scheduled outbound calls*



***The Portal toolbar,** with Session control, Telephony & Work control toolbars*

Please see next page for more information.

SYNTHESYS AGENT TOOLBARS AND STATUS BAR

The Synthesys.Net Portal consists of the Agent Status bar and three main toolbars:

- Agent Status bar
- Portal toolbar
- Webflow toolbar
- Transfer toolbar

Agent Status bar	Shows information regarding the Agent's log in status, and System, Dialler and Phone status. Most of the information is being obtained from the Live Monitor Service, reflecting information used in the 'Detailed Agent States' tab in the Live Monitor.
Portal toolbar	Consists of three CTI toolbars, Session control with log out and break buttons, Telephony toolbar with Dial, Hold and Transfer options, and Work control, for requesting the next record for a preview outbound call.
Webflow toolbar	Consists of the Session control & Telephony toolbars, a CRM section to enable agents to view customer profiles and histories, and a Webflow/Script Navigation toolbar for moving through the webflow, with Back, Next and Submit buttons, open Help page button, and Hold and Park calls buttons.
Transfer toolbar	The Transfer toolbar is displayed when an Agent initiates a transfer, consultation or conference call. In addition to the Session control, CRM and Webflow/Script Navigation toolbars, the telephony section of the Transfer toolbar includes Hang up, Swap Lines, Confirm, Transfer and Cancel buttons.

The next pages provide a detailed description of the Agent Status bar and toolbars available.

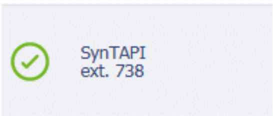
The Agent Status Bar

The Agent Status bar shows detailed information of the Agent currently logged into the Synthesys.Net Portal, including the General Status, System Status, Dialler Status, Phone Status and Blender Status.

The Timer displayed shows the time in the current state and is re-set to zero, if the state changes. The exception is when agents go on Break. In this instance a zeroed timer will be displayed to show the length of time on break, but the logged in timer will continue to run hidden in the background, and show a continued count when the Agent comes off break.

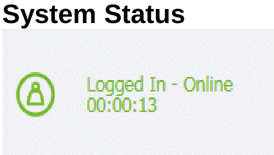
Toolbar Icons | **Description**

General Status



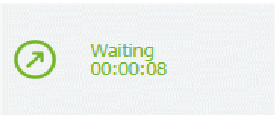
This is a summary of the system and dialler sections, and displays the Switch name in use and extension number.
A green tick shows that CTI is available.
A red cross shows that CTI is not available.

System Status



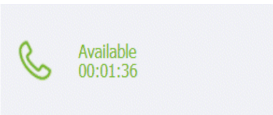
A green icon is displayed if the Agent is logged in and working.
A red icon is displayed to show, for example an error with the Portal Heartbeats or Pop Info requests.
A break icon is displayed, when the Agent is on a break.

Dialler Status



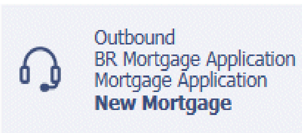
Green shows the status of the PD, ‘Available’, ‘Talking’, Wrapping Up’ etc.
Red is displayed, for example, for states NotReady (On Break), NotAnswering, InboundOnly.

Phone Status



This shows the status of the Agent’s extension.
A green icon shows that the phone is available.
A red icon shows that the phone is unavailable, it may be off hook or in-use.

Blender Status



Shows the Agent is working Inbound.

Shows the Agent is working Outbound, displaying the current account, webflow and Outbound campaign name. If the Agent is assigned to an Outbound Group, the Group name is displayed, without the account & webflow name.

Agent Profile. Placeholder to display Agent specific information. Not available in the current version of Synthesys.Net.

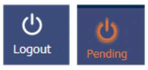
The Portal Toolbar

The toolbar in the Agent Portal consists of three CTI toolbars, Session control, Telephony and Work control.

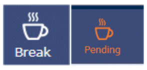
Session *Telephony*

Toolbar Icons	Description

Session Control



Log out. To log out of the Synthesys.Net Portal.
Pending. Shows that logging off is in progress.

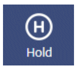


Break. Opens the Break dialog, where the Agent can request a break, change the break reason while still on break, or return to work. Pending. Shows that the Agent is currently on a break.

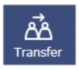
Telephony

Dial. Will open the *Dial Number* dialog prompting for a number.

Hangup. Allows the Agent to disconnect and end the current call.



Hold. Holds the call only, the webflow will remain open. The Agent state in the Live Monitor will be ‘Talking’.



Transfer (“Blind” transfer). Opens the *Transfer call* dialog, prompting for a number. Transfers the current call to another agent or external number, without waiting for the recipient to answer.

Consult. Opens the *Initiate consultation call* dialog, prompting for a number. Initiates a consultation call with another agent or external number, while putting the customer on hold.

Conference. Opens the *Initiate conference call* dialog, prompting for a number. Initiates a conference call with another agent or external number, with all parties (customer, agent and third participant) on the phone, for example, to introduce the customer to the third participant, before transferring the call.

Work control

Get Next. Request the next record to work. At present only used for preview dialing.

The Webflow Toolbar

The Webflow toolbar is displayed when agents are in a webflow, and consists of the Session control, Telephony, CRM and Webflow/ Script Navigation toolbars.

Session *Telephony* *CRM* *Script Navigation*

Toolbar Icons	Description
Session Control	Contains the same icons & functionality as described for the Portal toolbar.
Telephony	Contains the same icons & functionality as described for the Portal toolbar.

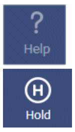
CRM

Contact. Displays customer details from the CRM/ Entity control.

History. Displays history events associated with the customer.

Notes. To view and add customer notes.

Webflow/ Script Navigation control



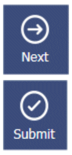
Help. Open the Web Help page assigned to the webflow.

Hold. Saves the webflow information collected and closes script. The Agent state in the Live Monitor will be ‘Previewing’. Only the Agent who has put the webflow on hold can retrieve it again.

Park. Saves the information collected in a webflow and can be retrieved by any Agent with access to the Parked call list, when the customer phones back.

Abort. Cancel the session and close webflow without saving call data.

Back. Navigation button to move back to the previous page of the webflow.



Next. Navigation button to move forward to the next page of the webflow.

Submit. Finish the webflow and save details collected to the database.

The Transfer Toolbar

The Transfer toolbar is a sub toolbar to the Portal and Webflow toolbars. It is displayed when an Agent instigates a transfer, consultation or conference call.

When the transfer, consultation or conference call is initiated from within a webflow, the Transfer toolbar consists of a Session, Telephony, CRM and Webflow/ Script Navigation toolbar. If the transfer is initiated from the Agent Portal, the Transfer toolbar simply shows the Session control and Telephony sections.

Session *Telephony/Transfer* *CRM* *Script Navigation*

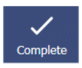
Toolbar Icons	Description
Session Control	Contains the same icons & functionality as described for the Portal and Webflow toolbars.
CRM	Contains the same icons & functionality as described for the Webflow toolbar.
Script Navigation	Contains the same icons & functionality as described for the Webflow toolbar.

Telephony/Transfer

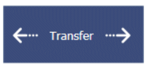
Swap Lines. Only available for consultation calls. Allows the Agent to alternate between the customer and the consultation call.

Clicking the Swap Lines button will automatically place the active consultation call on hold and activate the customer call. Clicking the Swap Lines button again will place the customer call on hold and activate the consultation call.

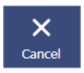
Hangup. To disconnect and end the current call.



Complete. Complete the Consultation or Conference call.



←Transfer→ Icon to show that a transfer is in progress.



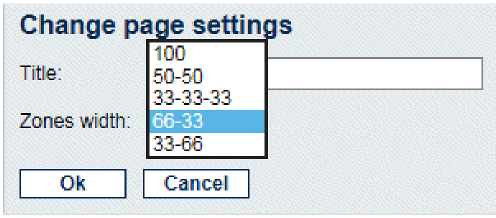
Cancel. Cancel the Consultation or Conference call.

PORTAL CONFIGURATION: PAGE LAYOUT

Clicking the **Settings** icon at the top right of the Portal screen you can change the Portal page settings, add Web parts (e.g. the Webflow Launcher, Live Monitor and Instant Messenger) using the Catalog option, set the Portal language and change their login password.

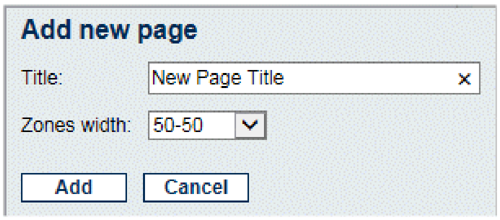
Changing Page Settings

- Select the page that you wish to edit
- Go to the **Settings** icon and select **Change page settings**.
- To rename the selected page, enter the new name into the **Title** field.
- To change the page size, use the **Zones width** drop down menu.
- Click *OK* to save the new settings, otherwise click the *Cancel* button.



Adding New Pages

- Go to the **Settings** icon, select **Add new page**, then enter the page name into the *Title* field, and the page size via the **Zones width** drop down menu.
- Click *OK* to save the new settings, or else click the *Cancel* button.



Removing New Pages

- Select the page that you wish to remove.
- Go to the **Settings** icon and select **Remove this page**.

PORTAL LANGUAGE: INTERNATIONALISATION

When running webflows in the Synthesys Portal, agents can set any language, as required, both for the Portal and specific webflows, thus displaying the Portal language and webflow information in any desired language.

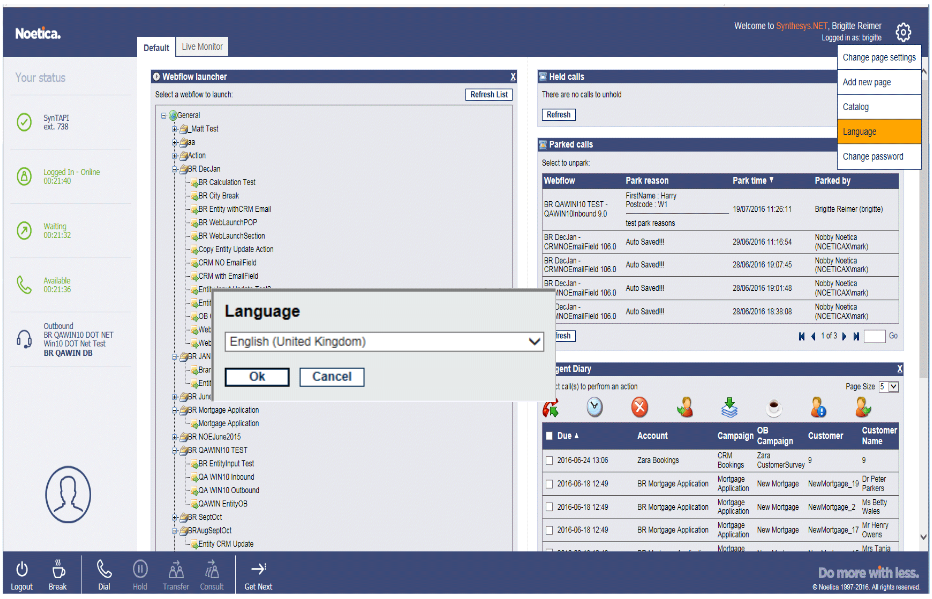
If no translation is available for the selected language, then the default language will be used in the Portal.

If no translation is available for the selected webflow, the default language of the Webflow will be used.

Setting the Portal Language

To set the language for the Synthesys Portal

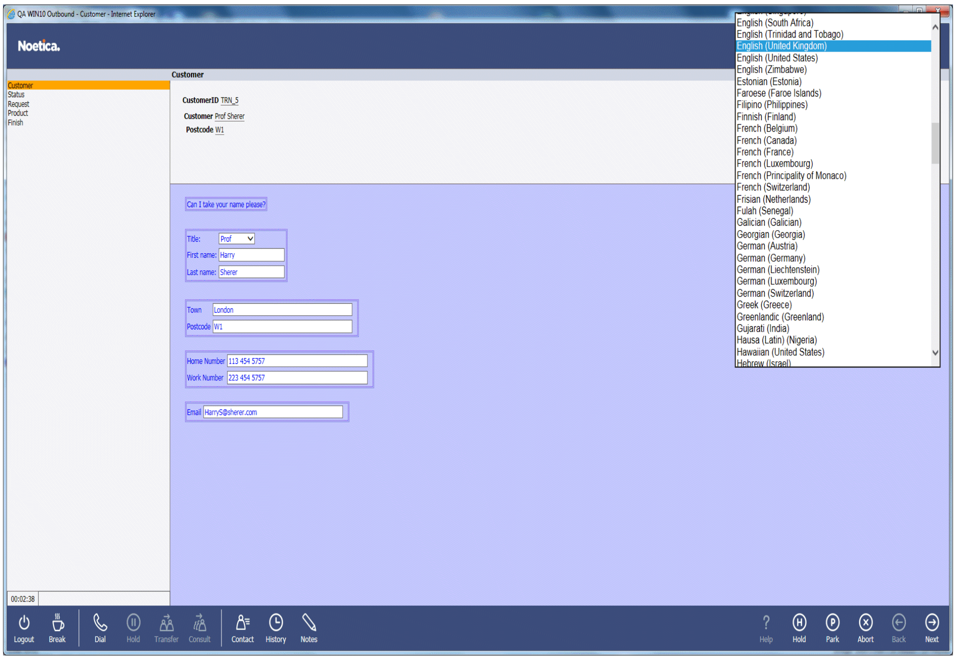
- Go to the **Settings** icon at the top right of the Portal screen and select ***Language***.
- From the *Language* drop down list, select a language, as required.
- The language now used in the Portal will change accordingly.
- If no translation is available for the selected language, the default language will be used.



Changing Webflow Language

To set the language for the webflow

- Select the target language, as required, from the drop down list at the top right of the webflow screen.
- The language used in the webflow will change as soon as you press ***Next>*** or ***<Previous*** to navigate to the respective page in the webflow.
- Any webflow that is subsequently launched will attempt to run in the language the agent has selected.
- If no translation is available for the selected language, the default language of the webflow will be used.



CATALOG OPTION: WEB PARTS

To add web parts to the Portal page, go to the **Settings** icon at the top right of the Portal screen and select the **Catalog** option.

Remember that access to the individual web parts will depend on the permission level assigned to the user logged in to the Synthesys Portal.

Web Part	Description
Webflow Launcher	Access permission to the Webflow launcher enables users to select and run Webflows.
Held calls	Display a list of *Held* calls. Webflows can be put on hold with the call data collected and can be retrieved again by the agent who has originally put the call on hold.
Parked Calls	Display a list of Parked calls. Webflows can be parked with the call data collected. Any agent with access to the parked call list can retrieve parked Webflows and associated information.
Agent Diary	The Agent Call Diary displays a list of all sleeping and scheduled outbound calls that are assigned to the agent currently logged into the Synthesys Portal. The Agent can view associated CRM details, and manipulate the calls, e.g. select and handle a call immediately, or change the date and time for the callback.
Live Monitor - Queue States	Allows users to view, visually in a graph, the percentage of Queued, Sleeping Due, Sleeping Non Due, Scheduled, Scheduled, Complete or Running calls.
Live Monitor – Detailed Agent States	Allows users to view details of agents logged on to the Synthesys.Net Portal, switch information, extension number and detailed call statistics.
Instant Messenger	Enables users to send quick messages around the Contact Centre to users currently logged in to the Synthesys.Net Portal. Messages are stored in the Phoenix_Audit table.
Link Launcher	The Link Launcher Web Part allows users to open pre-defined links in a new window. Links can be represented as text, an image or both. The launcher can pass parameters to the opened window, either user provided or a selection of Synthesys variables. The links are defined in an XML configuration file.

For a more detailed description about the use of the available web parts, please see the section Synthesys.Net Portal Web Parts at the end of this manual.

SYNTHESYS.NET WEBFLOWS

From the moment a campaign appears in the Synthesys Portal, until the call ends, you are presented with all the information they need to handle the call in a knowledgeable and professional manner.

The CRM/ Entity module is designed to allow access to customer profiles and customer histories, providing you with the best possible help in dealing with customers' queries and requests.

Each screen in the webflow contains questions, supported by text prompts at the top of the screen. This text can be actual dialogue that should be spoken, or prompts to help you recognize areas of a webflow that need special attention.

As each section is completed, the corresponding headings are added to the left-hand side of the screen, creating a summary of the call so far.

A mouse click on any one of these headings scrolls the relevant section back into view. This is useful when a caller decides to change an answer given to a previous question. For example, they may decide to ask for a brochure instead of placing an order. In this case, you can instantly return to the appropriate area of the webflow and make the necessary changes. All previous data that has been entered and is still relevant, is retained. Moving forward in the webflow, you are presented with the next logical question relevant to the amended data, enabling you to move through the webflow without ever having to input the same information twice.

Launching a Webflow

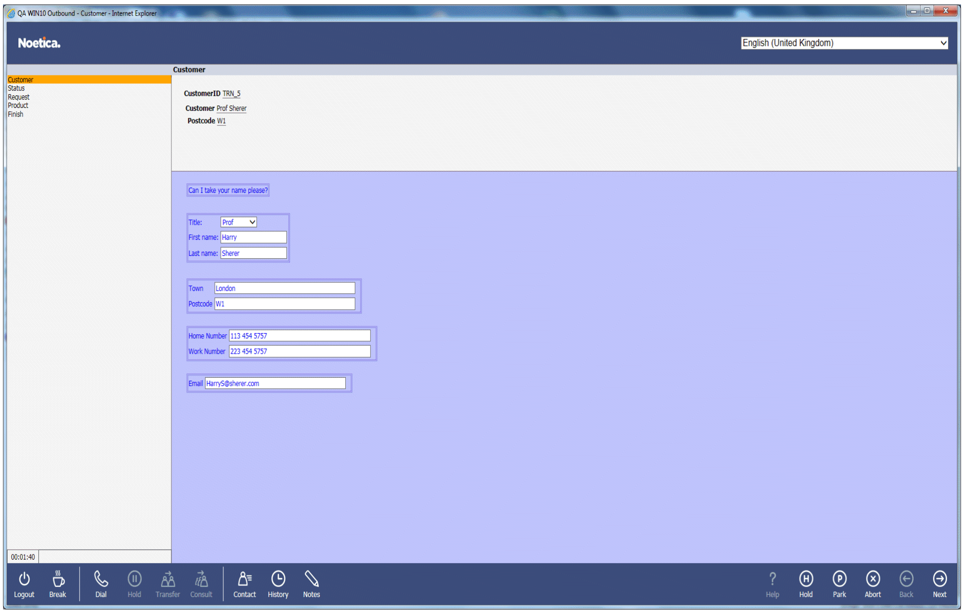
Having logged into the Synthesys Portal via the Web Browser, the correct webflow is automatically launched when a call is routed through to your workstation.

*For **Inbound calls**, the system launches the webflow by comparing the telephone number dialled with the DDI numbers stored against each released webflow.*

*When taking **Outbound calls**, the list of customers to be phoned will have been created by your Supervisor. The CRM record for the next call will pop automatically, if it is a predictive Outbound campaign, or if 'Idle Timeout' has been enabled for a preview Outbound campaign.*

To load the next record for a preview Outbound campaign manually:

- Agents must click the **Get Next** Get Next icon on the CTI toolbar.



*When an **Outbound campaign** is popped to the agent screen, customer details can be displayed in the relevant web controls or as part of the dashboard, if associated calculations and parameters have been created in the Synthesys Interaction Studio.*

The next page describes searching for customer details when taking Inbound calls.

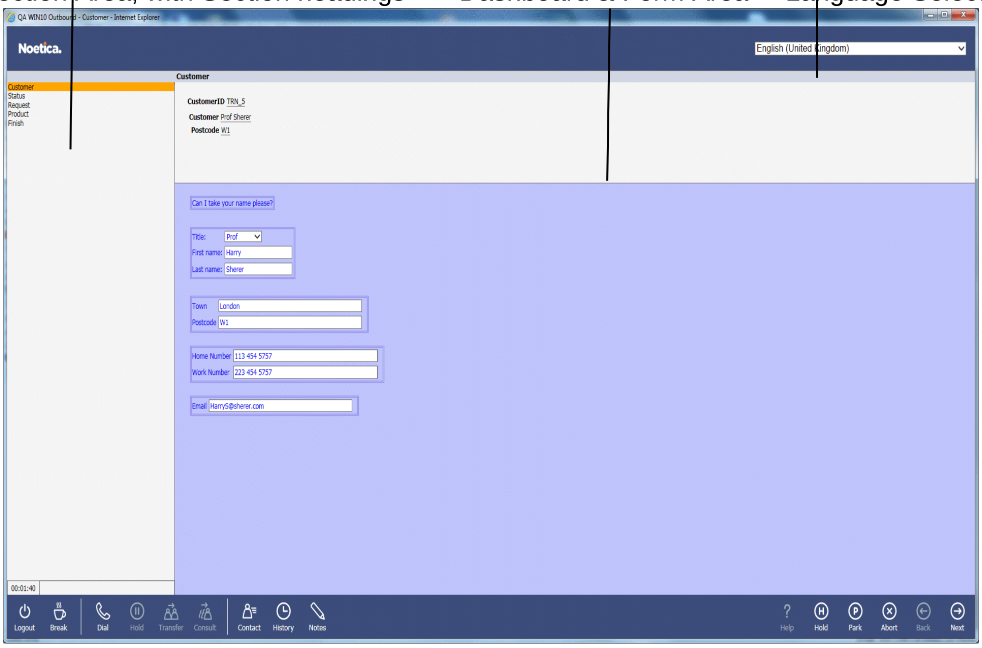
WEBFLOW MAIN SCREEN

When a Webflow is launched, the first *Section of a* campaign is displayed together with the initial questions.

The way the Webflow information in each section is presented to the agent can be compared with the lay-out of a form. Each section, supported by text prompts in the agent's dialogue box, contains specific questions that need to be answered before moving to the next section.

In our example we have opened the Webflow for the 'City Breaks' campaign.

Section Area, with Section headings   Dashboard & Form Area   Language Selection



CTI Toolbars   Script Navigation Area

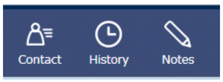
The Webflow consists of the following areas:

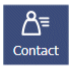
Section Area	*Displays the section headings of the Webflow*
Dashboard	*Customizable, displays at the top of the Webflow screen selected information from the CRM and Webflow sections*
Form Area	*Displays the questions and enables the agent or user to enter relevant information*
Language	*Allows selection of language from drop down list*
CTI Toolbars	*Includes Session and Telephony toolbars. It also show a CRM toolbar, if CRM/ Entity data is used.*
Navigation Area	*Enables agents and users to move through the Webflow*

VIEWING CUSTOMER DETAILS

Customer Details

When using CRM/ Entity data, you can view customer profiles and histories and add notes for the selected customer using the CRM toolbar.



To view customer details, click the **Contact** 

icon on the *CRM* toolbar.

Customer Details

Customer ID	TestID_29
Title	Mrs
FirstName	Tanja
Surname	Grace
Home	11xxxxxxx001
Work	
Town	London
Postcode	SW18
Email	
DDI	

Close

Customer History

Clicking the **History** 

icon on the *CRM* toolbar, agents can view historical information associated with the customer record displayed.

Customer History

EventID	Date	Time	Agent	Event	Details
535	22/06/2016	11:03:07	brigitte	Outbound Managed Change State	Call 58374 Changed State to Queued
516	14/06/2016	11:16:21	brigitte	Outbound Webflow [-] Aborted	Busy
472	09/06/2016	17:21:41	brigitte	CallSlept	
460	09/06/2016	17:20:37	brigitte	Call Queued	Call 58374 queued

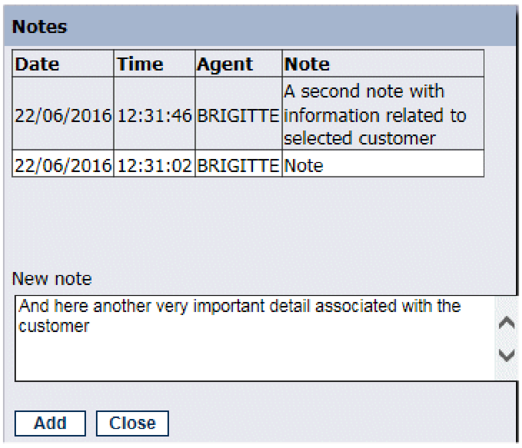
Close

Adding and Viewing Notes

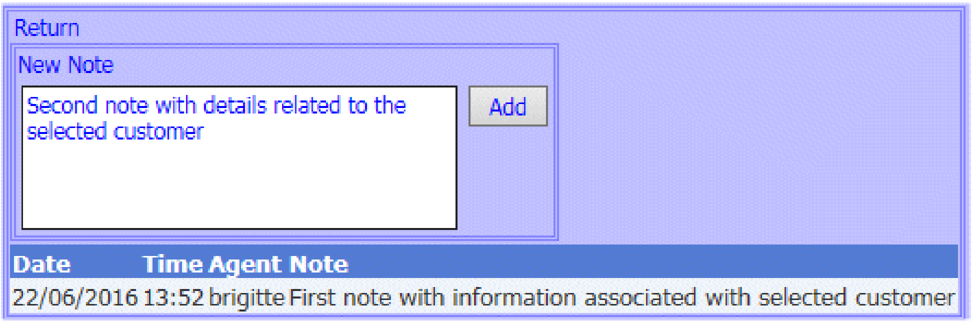
To add notes containing information associated with the selected customer:

- Click the ***Notes*** 

icon on the *CRM* toolbar, or
- Select the **Add Note** option that forms part of the Entity control, if enabled at design time.



- Enter the required note or comments relevant to the selected customer into the **New note** text field.
- Click the ***Add*** button to add the message, and then click the **Close** button to return to the Entity control in your webflow.

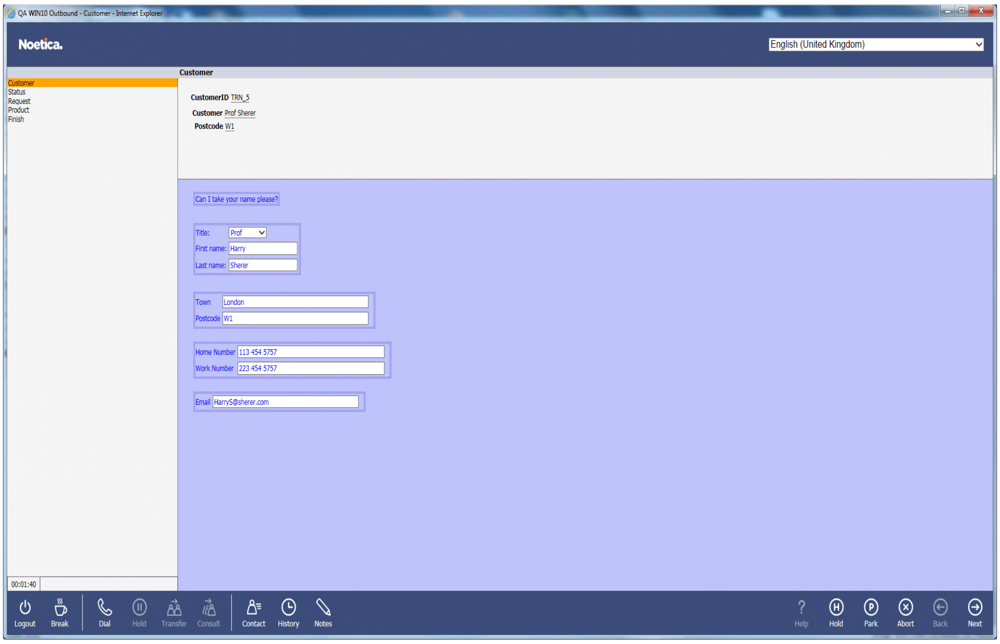


- To view existing notes select the ***Notes*** icon, or **Add Note** in the Entity control, as above.
- To add further notes, enter your message into the **New Note** text field, then click the **Add** button.
- Click the **Return** link, to go back to the Entity control in your webflow.

AGENTS DIALOG PROMPTS

Sections are supported by text prompts in the agent’s dialogue box.

Sections and prompts skilfully guide you through a call and ensure that all relevant questions are asked and that the information is collected and entered in a consistent format.

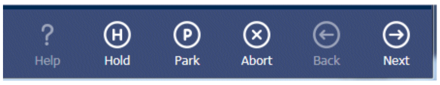


The text prompts can be the actual dialogue that should be spoken, or prompts to help you to recognize areas of the webflow that need special attention. To highlight the difference, different colours and font sizes are typically used.

Synthesys is easy to use and you can learn quickly how to handle a wide variety of calls.

NAVIGATING THROUGH A WEBFLOW

To move through the Webflow, use the tab keys on your keyboard, or the ***Next, Back*** and ***Submit*** options on the ***Navigation*** toolbar at the bottom right of the screen.



Moving between Sections

To move to the next section of the Webflow, click on **Next**  at the bottom right of the *Navigation* toolbar, or press *Ctrl + Enter* on the keyboard to move to the next section.

To move back to the previous page of the webflow, click on **Back**  .

Completing a Call

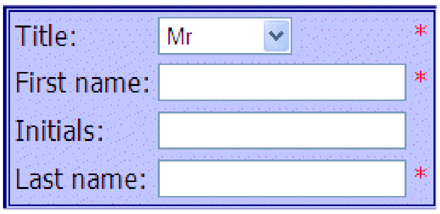
When you are in the last section of the webflow, the **Next** button changes to **Submit.** Click **Submit** , to finish the call and submit the data collected to the database.

Moving between Questions

To move between questions within a section, press the *Tab* key on the keyboard. To move backwards through these fields, press *Shift + Tab*.

Moving between Fields in a Question

Many of the *Web Controls* used within questions are made up of a number of fields, for example, the *Name Control* may contain 4 fields: *Title*, *First name, Initials* and *last name.*



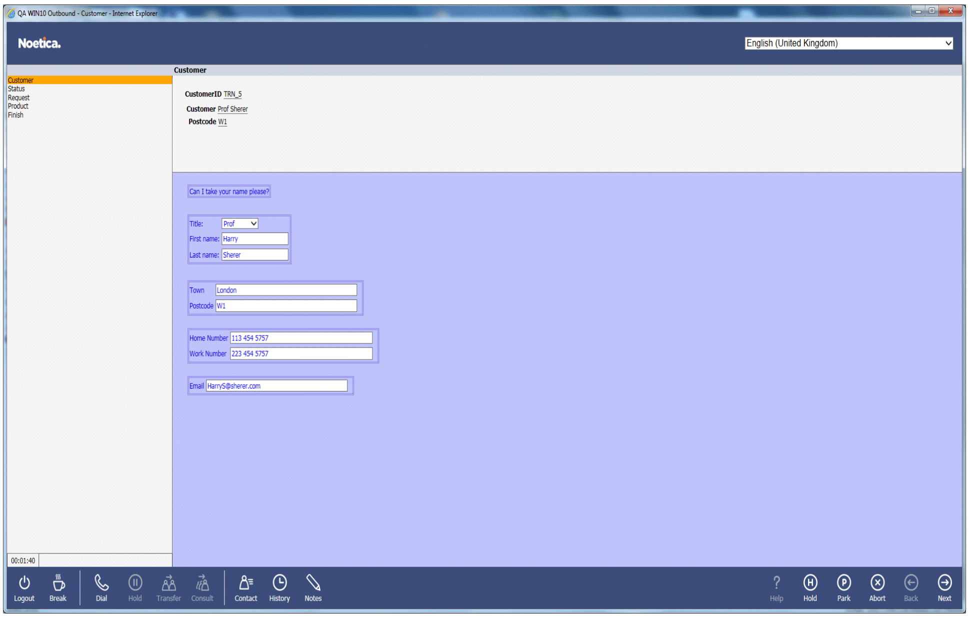
To move forward between these fields, press the *Tab* key on your keyboard. To move backwards through these fields, press *Shift + Tab*.

The stars indicate that these fields have been set to be compulsory in the **Validation page** of the control properties. Agents are required to enter details before they can move on.

Section Titles

As you progress through the Webflow, *Section Titles* will be displayed on the left hand side of the web page.

You can click on any section heading to display the questions associated with this section.



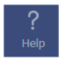
When moving backwards and forwards in the Webflow, all relevant information that you have entered will be retained.

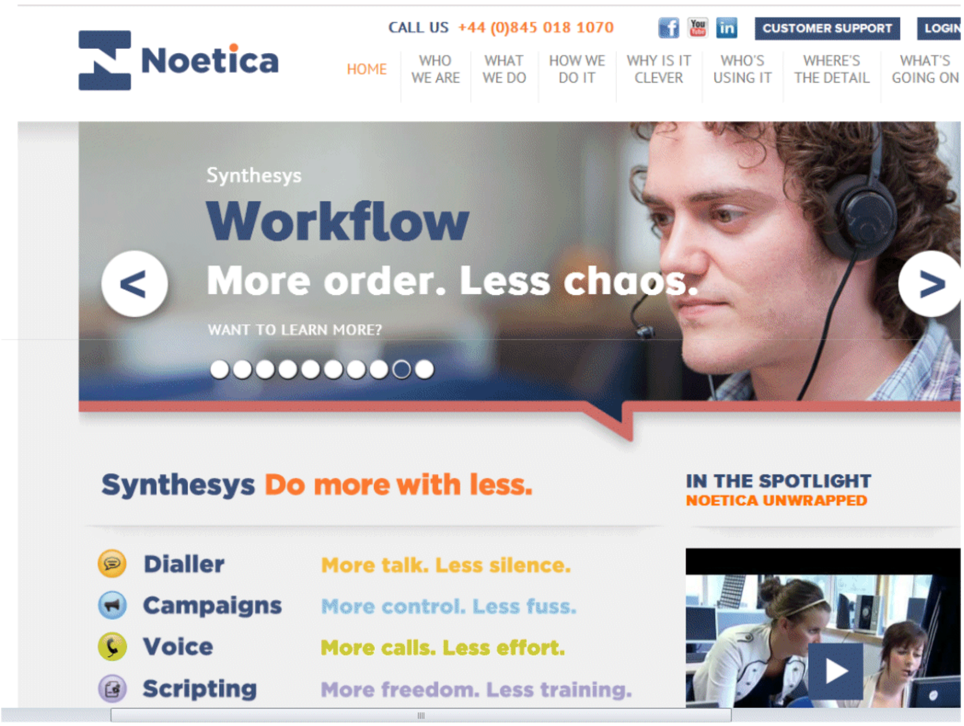
Web Help Pages

Help pages can provide additional information regarding a company, its products and services.

This enables you to respond quickly and in a knowledgeable way to customers' enquiries and allows you to check specific information, for example the make of a car or the product number or price of a product, presenting the best image of the company.

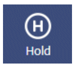
Help pages can be connected to a companies' Intranet, i.e. their internal information network and to the Internet in which case agents can draw on information from the World Wide Web.

To launch an assigned *Web Help Page*, click on **Help** 
 icon at the ***Navigation*** toolbar.



Holding and Parking Calls

Another feature of Synthesys is the ability to *Hold* or *Park* a call by clicking the park or hold option on the ***Navigation*** toolbar.



In Synthesys.Net a call can be put On Hold using the CTI toolbar or using the Hold option in the Webflow runner.

If On Hold is selected from the CTI Toolbar, the script will stay on when the call is held and the agent state in the Live Monitor will be Talking. The Hold time here is added as Talk Time in the Phoenix_CallTimes table.

If On Hold is selected in the Web Flow Runner, the script will close and the agent state in the Live Monitor will be Previewing. Hold time in this case is added as Preview Time in the Phoenix_CallTimes table.
Only the agent who has put the Webflow on hold can retrieve it again to access the information previously collected.

The script will close and the call is parked. Any agent with access to the *Parked Call* list can retrieve a parked Webflow and access the information previously collected.


Parked calls

Select to unpark: Page size: 5

Webflow	Park reason	Park time	Parked by
BR DecJan - CRMNOEmailField 95.0	xxxxxxxxxxxxxxxxxxxxxx	18/03/2016 16:08:59	Kim Constantine (NOETICAX\kim)
ChrisB - Test 2.0	with active call	27/03/2015 12:21:00	chris b (chrisb)
BR QAWINI10 TEST - QAWIN10Inbound 6.0	will call back with extra info	06/06/2016 16:59:00	Brigitte Reimer (brigitte)
BR SeptOct - FirstDYnOB 4.0	un-parking and parking call	01/05/2014 16:58:38	Brigitte Reimer (brigitte)
BR DecJan - CRMNOEmailField 95.0	testing1000000000	23/03/2016 10:25:40	Kim Constantine (NOETICAX\kim)

Refresh   1 of 9   Go

Run parked or held calls

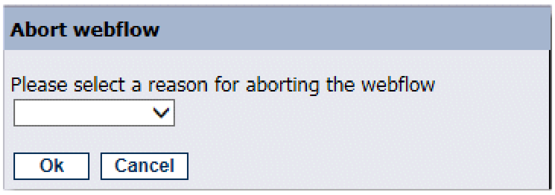
To retrieve a held or parked call to re-run the calls, click the left mouse button on the relevant Webflow.

All call data previously collected has been retained and agents can now take any further details as required, to complete the call.

Aborting Webflows

To exit your Webflow without saving the information entered, click the **Abort** 

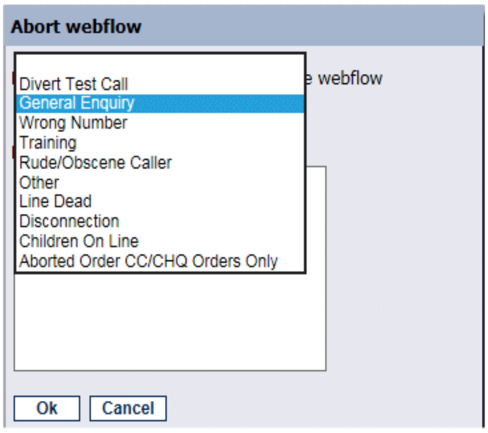
option on the *Navigation* toolbar, to open the 'Abort' window.



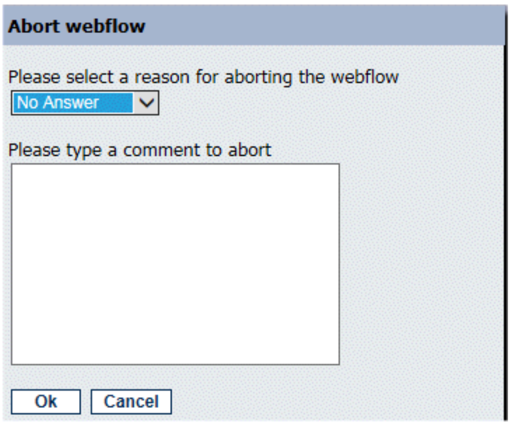
Open the drop down menu and select the reason for aborting the call. If required, enter further information in the text box now displayed.

Click '**OK**' to Abort the call.

Abort Options Inbound



Abort Options Outbound



Please note that the abort options available are different for Inbound and Outbound calls.

To return to the Webflow without aborting the call, click '**Cancel**'.

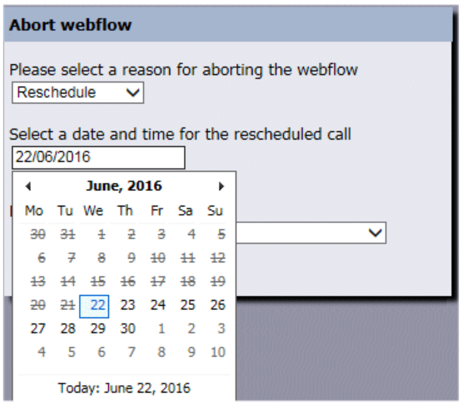
Reschedule and Special Reschedule

The Reschedule or Special Reschedule options are used when aborting a webflow to arrange a callback for a specified date and time:

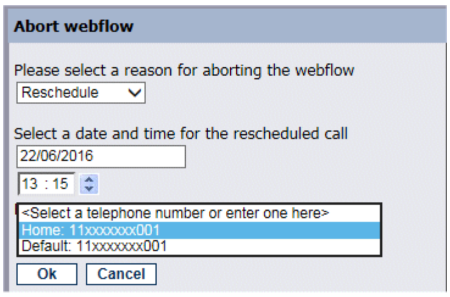
- Click the Abort option, and in the *Abort Webflow* dialog select ***Reschedule*** from the drop down list.
- Select **Special Reschedule (**or similar, depending on the entry in the *Outbound Abort Reason* section), to reschedule a partly completed webflow, retaining the information collected up to this point.

Next, specific the date, time and telephone number for the callback:

- Click into the Date field and from the *Date Time Picker* page displayed, select the date for the callback.
- Specify the time for the callback.



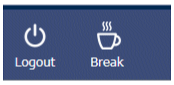
The ***Reschedule/ Special Reschedule*** dialog, depending on the set-up, either simply displays the last number dialled or, if Reschedule Flags are enabled, allows you to select or enter a telephone number for the callback.



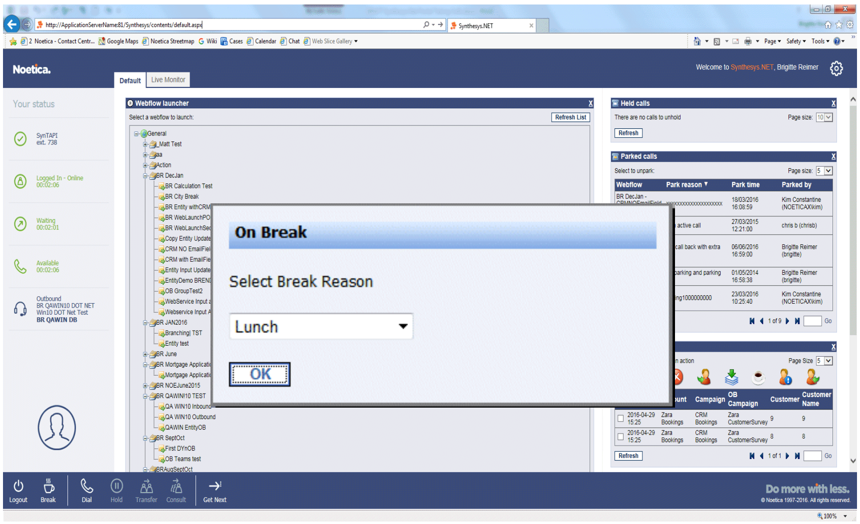
A webflow that was aborted using the special reschedule option, when re-presented to the agent, will open at the point at which it was rescheduled, still containing the details collected. Agents can then finish the partially completed call, without having to re-enter the information collected previously.

Going On Break

To notify the dialler that you wish to go on a break, use the Break option on the ***Session*** toolbar.

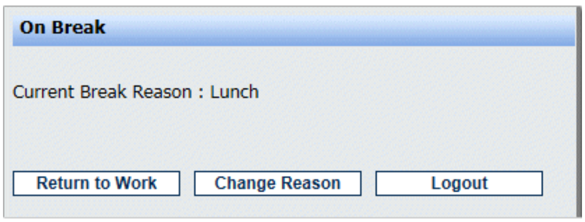


- Click the **Request a Break**  icon on the ***Session*** toolbar**,** while still in a call.
- After you have completed or aborted the current call, the **On Break** dialog will open.
- If the ***On Break Reason*** function is enabled, select the reason for going on break from the drop down menu, before clicking **OK.**



The **On Break** dialog will display the break reason selected, e.g. Lunch.

- Select **Return to Work,** to return to work at the end of your break.
- Select **Change Reason, to change the break reason selected,** while still on a break.
- To log out of the Portal, select **Logout.**



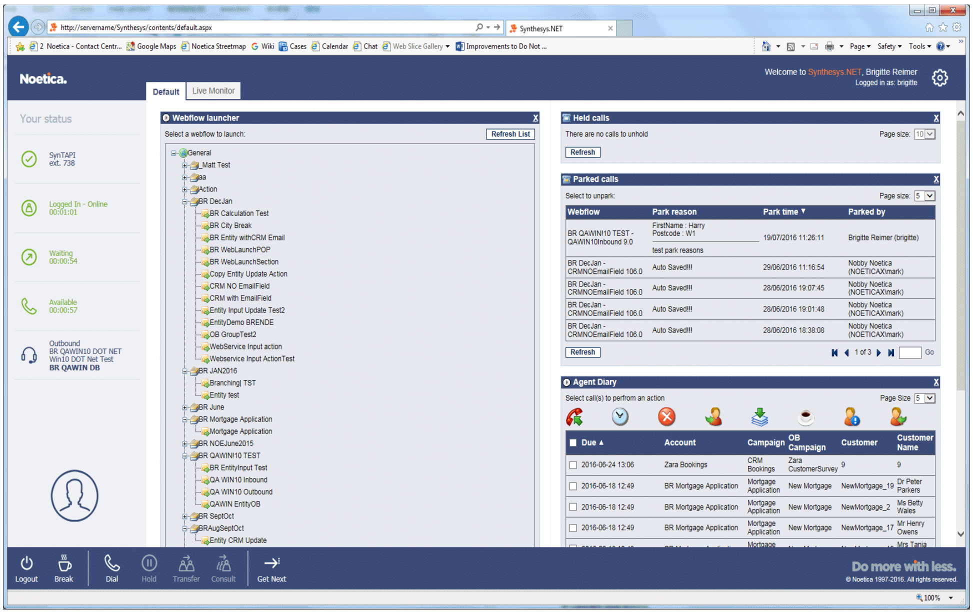
USER LOGOUT

To log out of the Synthesys PD properly, click the **Logout** option on the ***Session*** toolbar.

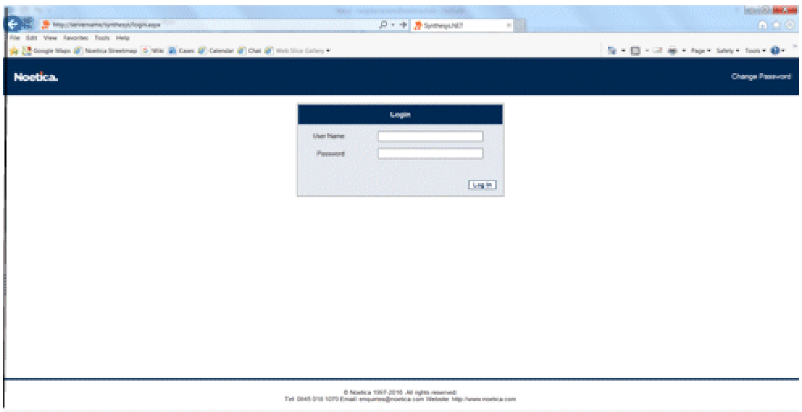
- Click the **Logout** 

 icon on the Portal or Webflow toolbar
- The **Pending** 

 icon is displayed while the PD processes the user logout request.

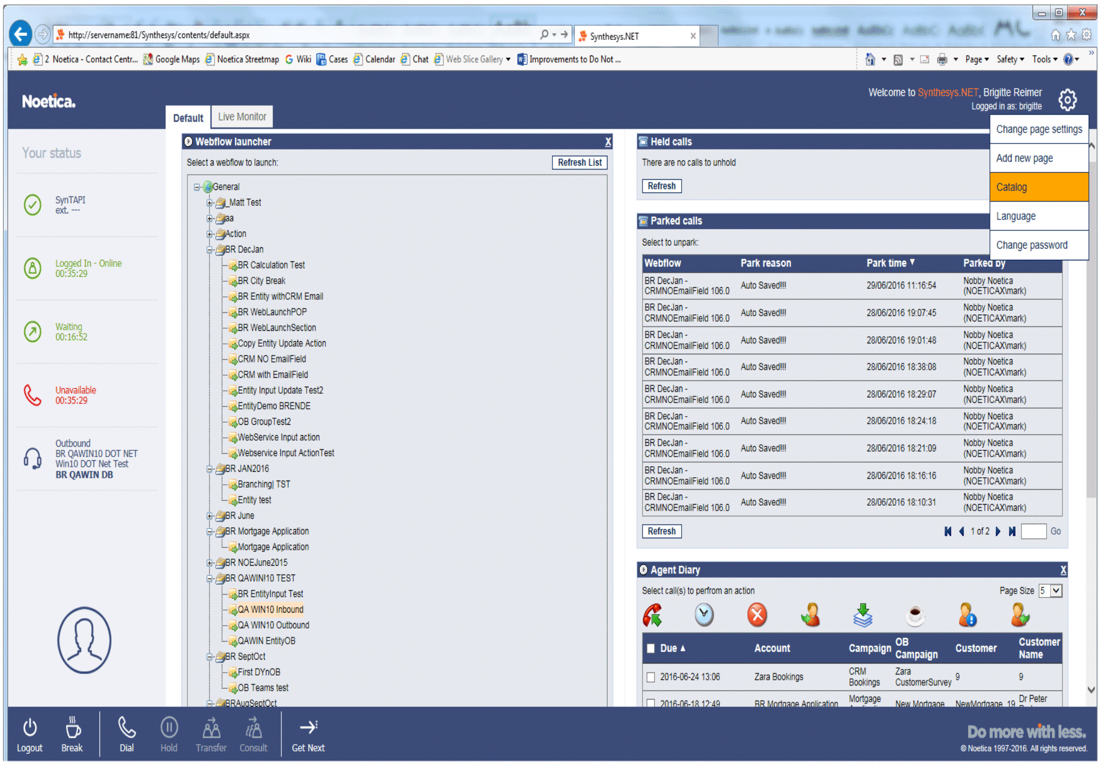


- When the PD logout is complete, the ***Login*** dialog will be displayed. You can now either log back in again, or exit the Web Browser.



SYNTHESYS.NET

WEB PARTS



ADDING SYNTHESYS.NET WEB PARTS

Having logged into Synthesys, the Agent Portal screen is displayed.

The appearance of the screen can vary, displaying different branding images and background colours, reflecting, for example, the branding used by your company.

If no Web parts are displayed when you log on to the Synthesys Portal for the first time, please go to the ***Settings*** *icon at the top right of the Portal screen.*

Select the ***Catalog*** *option, to pick up the Webflow Launcher and other web parts. Access to the web parts will depend on the permission level assigned to you.*

CONTENT

The Webflow Launcher

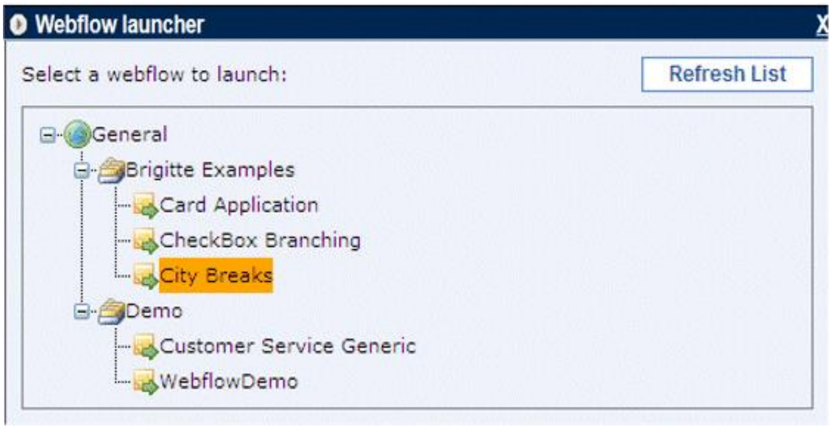
Users with access permission to the Webflow launcher can open and run Webflows.

To add the Webflow launcher web part to the Synthesys Portal

- Go to the **Settings** icon at the top right of the Synthesys.Net Portal screen.
- Select **Catalog**, *and* place a tick into the check box next to Webflow launcher.
- Click the **Add** button, to add the Webflow launcher to your Web page.

The *Webflow launcher* screen graphically represents the customer accounts and Webflows that are stored within the system.

A Webflow is created for each campaign you are managing and is stored under the appropriate customer account.



Users are only able to see the Webflow accounts and campaigns that have been added as part of their current user permissions.

Held and Parked Calls

The Held and Parked calls options enable users to view a list of held and parked Webflows. To add the Held and Park web parts to the Synthesys Portal

- Go to the **Settings** icon at the top right of the Synthesys.Net Portal screen.
- Select **Catalog**, *and* place a tick into the check box next to *Held calls* and *Parked calls*.
- Click the **Add** button, to add the web part to your Web page.
- Click the ***Refresh*** button, to update the list of parked or held Webflows.

The number of calls displayed on a page can be adjusted using the Page size drop down menu. To move to a specific page, enter the page number into the box at the bottom right of the Parked/ Held calls window and then click the Go button.

- To re-run parked and held calls, click the left mouse button on the relevant Webflow. All call data previously collected will have been retained and agents can now take any further details as required, to complete the call.

Parked calls

Select to unpark: Page size: 5

Webflow	Park reason	Park time	Parked by
BR DecJan - CRMNOEmailField 95.0	xxxxxxxxxxxxxxxxxxxxxxx	18/03/2016 16:08:59	Kim Constantine (NOETICAX\kim)
ChrisB - Test 2.0	with active call	27/03/2015 12:21:00	chris b (chrisb)
BR QAWIN!10 TEST - QAWIN10Inbound 6.0	will call back with extra info	06/06/2016 16:59:00	Brigitte Reimer (brigitte)
BR SeptOct - FirstDYnOB 4.0	un-parking and parking call	01/05/2014 16:58:38	Brigitte Reimer (brigitte)
BR DecJan - CRMNOEmailField 95.0	testing1000000000	23/03/2016 10:25:40	Kim Constantine (NOETICAX\kim)

Refresh 1 of 9 Go

Option	Displays the
Webflow	Name and Version number of the Webflow that is parked or on hold.
Park reason	Reason the Webflow was parked or held. The *Parked & Held* information can be configured in the Webflow properties section to include other relevant details as required, for example customer name and contact details.
Park time	Date and time the Webflow was parked or held.
Parked by	Name of the person who parked the Webflow or put it on hold.

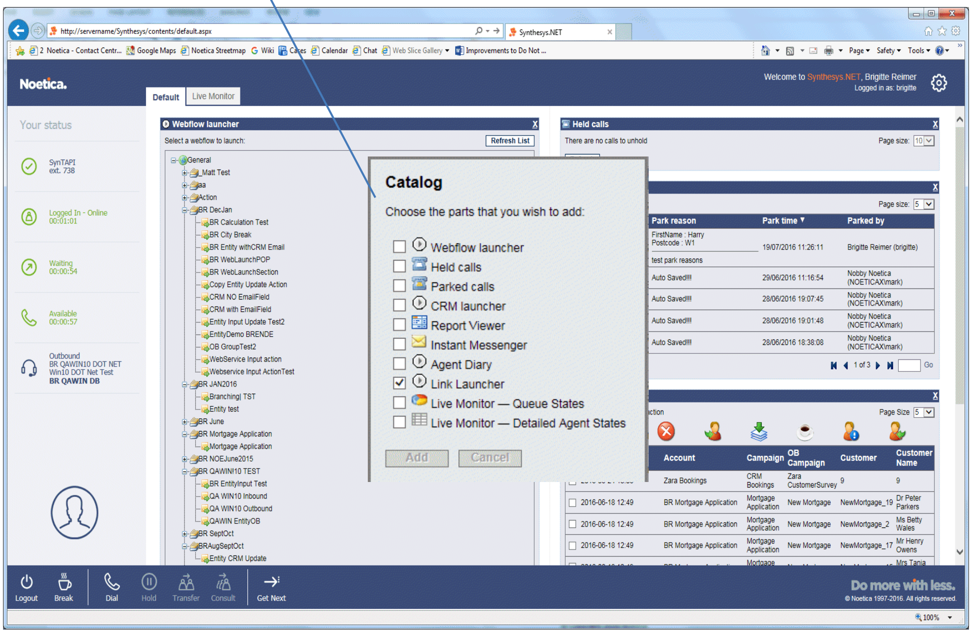
The Link Launcher

The Link Launcher Web Part in the Synthesys.Net Portal allows the user to open pre-defined links in a new window.

The links can be represented as text, an image, or both. The launcher can pass parameters to the opened window, either user provided or via a selection of Synthesys variables. The links are defined in an XML configuration file.

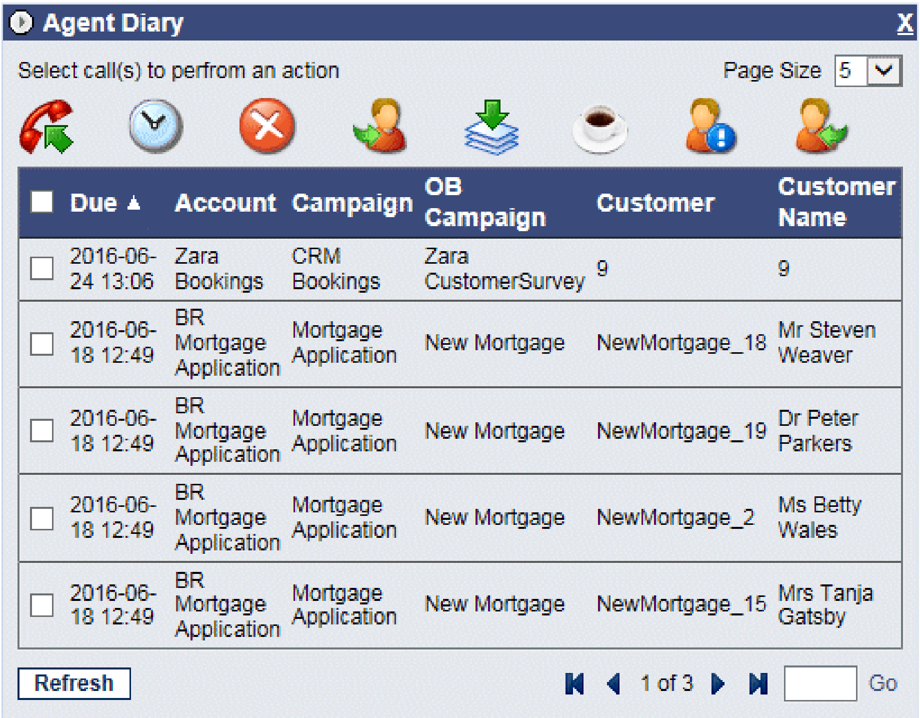
To add the Link Launcher web part to the Synthesys Portal

- Go to the **Settings** icon at the top right of the Portal screen, and select **Catalog**.
- In the *Catalog* page tick the options **Link Launcher,** to display the Link Launcher Web Part in the Synthesys Portal.



- Users can now click on any of the links, as pre-defined in the Link Launcher Web Part, to launch the associated web page.

Agent Call Diary



The Agent Call Diary

The *Agent Call Diary* enables call centre agents to view sleeping and scheduled outbound calls and associated CRM information, with the option to manipulate these calls.

The Call Diary displays a list of all calls that are assigned to the agent currently logged into the workstation and enables the agent to view associated details, including:

- The Date the call is due
- Account, Campaign and Outbound list name,
- Customer prefix
- Customer Name

Additional permissions can be assigned to allow agents to:

- Reschedule calls to a later date and time
- Remove calls from the outbound call list (optional)
- Reassign calls to another agent
- View customer details and history events associated with the selected call

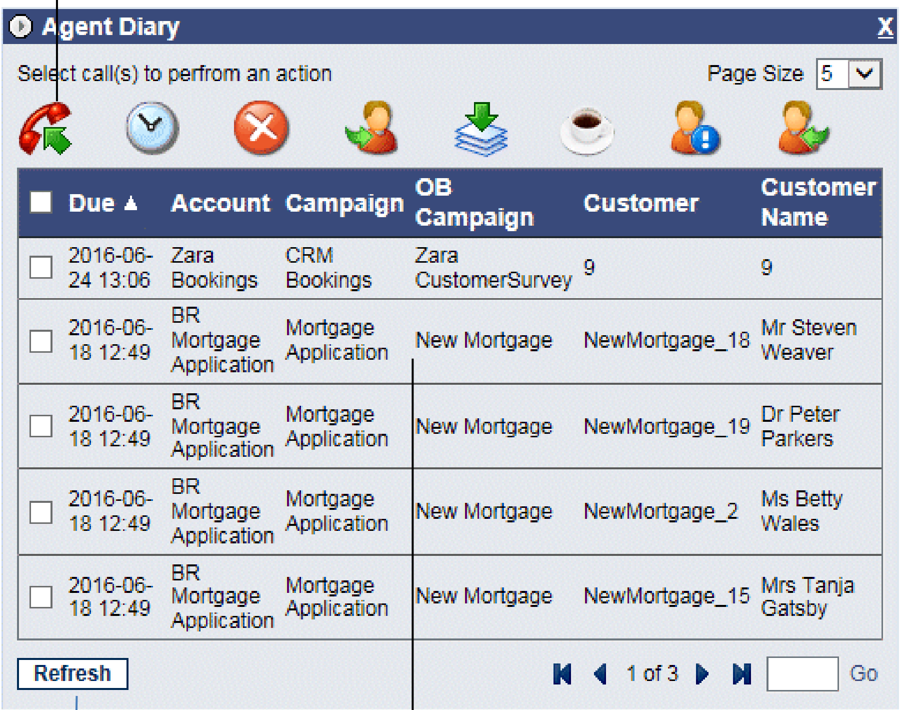
Starting the Agent Call Diary

If the Agent Call Diary is not already displayed in the Synthesys Portal you can add the option, providing that you have the relevant access permission.

To add the Agent Call Diary to the Synthesys Portal

- Go to the **Settings** icon at the top right of the Synthesys.Net Portal screen.
- Select **Catalog**, *and* place a tick into the check box next to **Agent Diary**.
- Click the **Add** button, to add the Agent Call Diary to your Web page.

Toolbar with icons and tool tips to enable manipulation of scheduled calls



List of sleeping/ scheduled calls assigned to agent currently logged on

Refresh button to update list

Please see next pages for a description of the Call Diary toolbar and the options available for manipulating rescheduled and sleeping calls.

Agent Diary Toolbars

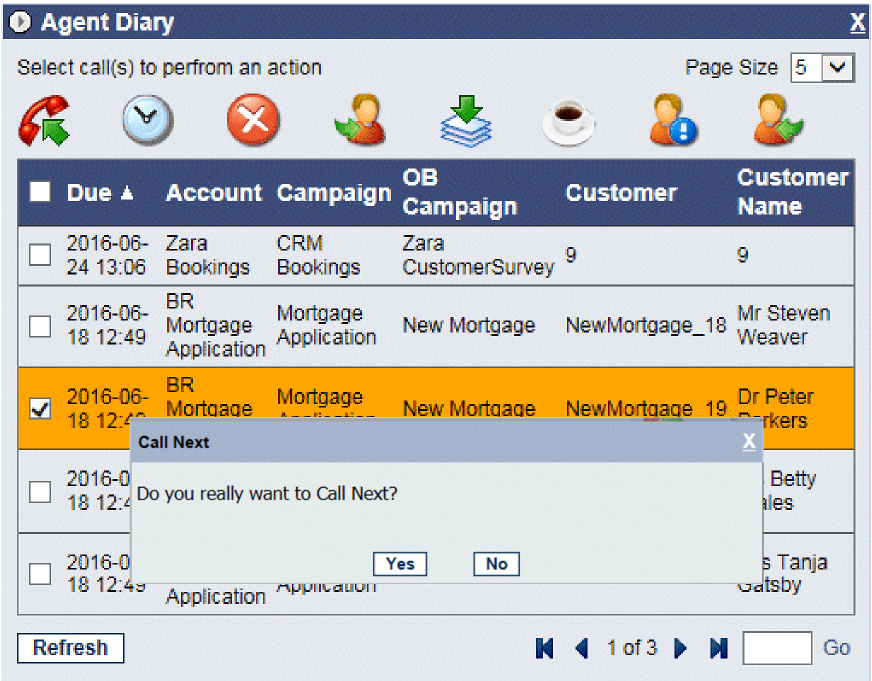
The Agent Call Diary has one main toolbars:

Icon	Description
	**Call Next.** Pick up the selected call to be taken immediately.
	**Reschedule.** Schedule the selected call to be taken at another date/ time.
	**Remove.** Remove the call from the Outbound list.
	**Reassign.** Assign the call to be taken by another agent.
	**Filter**. Set a filter to display selected calls only.
	**Refresh.** Display the updated list of rescheduled and sleeping calls.
	**Details**. Display customer details associated with the selected call.
	**History**. Display the history events associated with the selected call.

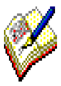
Call Next

To pick up and handle a rescheduled or sleeping call immediately:

- Select the record that you wish to call.
- Click the ***Call Next***  icon.



- Click **Yes** to open the selected call on your screen, ready for you to handle.
- Click **No** to cancel the action.



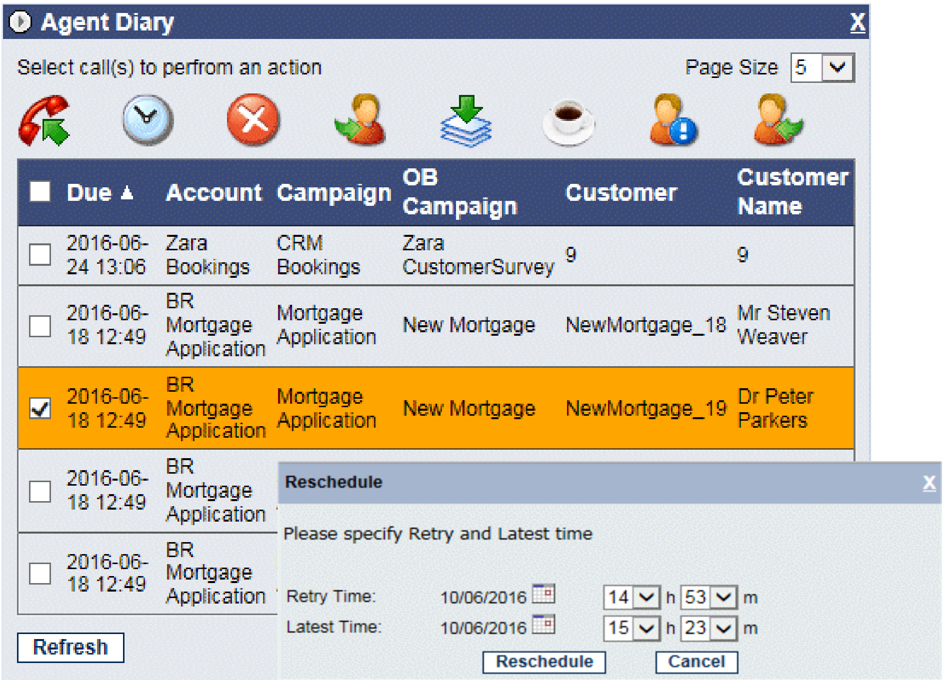
In the Call Diary, users are able to select and call records from outbound list that are not currently assigned to their team.

However, to allow for the record to pop to the agent screen, supervisors must ensure that the webflows associated with these outbound lists are part of the users' team.

Reschedule

To reschedule selected calls to be taken at a later date and time:

- Select the record(s) that you wish to reschedule.
- Click the ***Reschedule*** icon.



In the Reschedule dialog subsequently displayed:

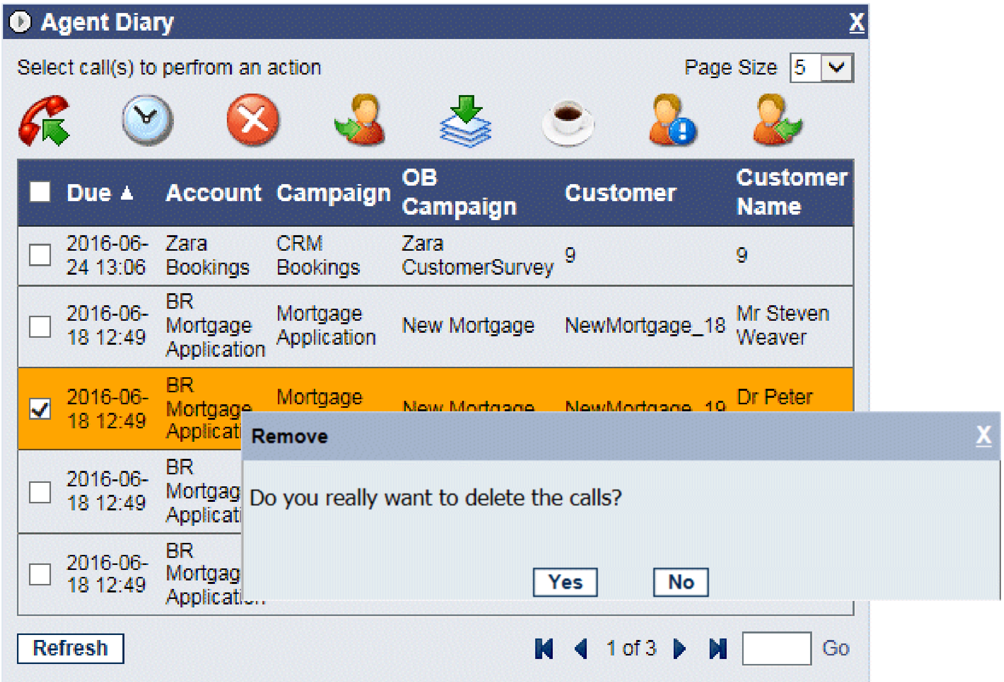
- Select the date and time to reschedule the call.
- Select the latest date and time during which the call should be taken.
- Click *Apply* to display the changes.
- Click *Cancel*, to abandon the action.

The outbound call list will be updated automatically, displaying the new date and time for the callback.

Remove

To remove selected calls from the outbound call list:

- Select the record(s) that you wish to remove.
- Click the ***Remove***  icon.



A message will ask if you really want to remove the selected call(s) from the outbound list.

- Click ***Yes*** to delete the calls from the outbound call list.
- Click ***No*** to abandon the action, without removing the selected call(s).
- Click the ***Refresh***  icon to display the changes.

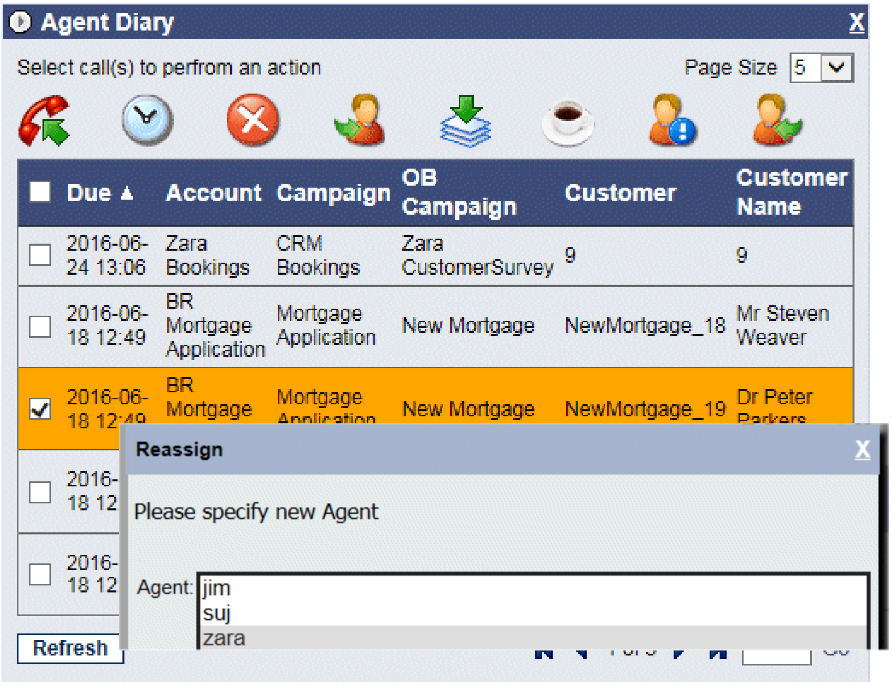
The outbound call list will be updated automatically, with the removed call(s) no longer showing as a queued item.

If you do NOT want your agents to be able to remove records from Outbound call lists, please contact the Noetica technical support, and ask for the 'Remove' option to be taken out.

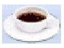
Reassign

To reassign rescheduled and sleeping calls to another agent:

- Select the record(s) that you wish to reassign.
- Click the ***Reassign***  icon.



The *Agent* drop down list in the ***Reassign*** dialog only shows the names of agents that are able to work the outbound list, to which the selected record belongs.

- Select the ***Name*** of the agent to whom you wish to assign the call.
- Click ***Apply*** to confirm, or ***Cancel*** if you do not wish to reassign the call.
- Click the ***Refresh***  icon to display the changes.

The outbound call list will be updated automatically, displaying the *Agent ID* and the *Agent Name* of the agent that you have selected.

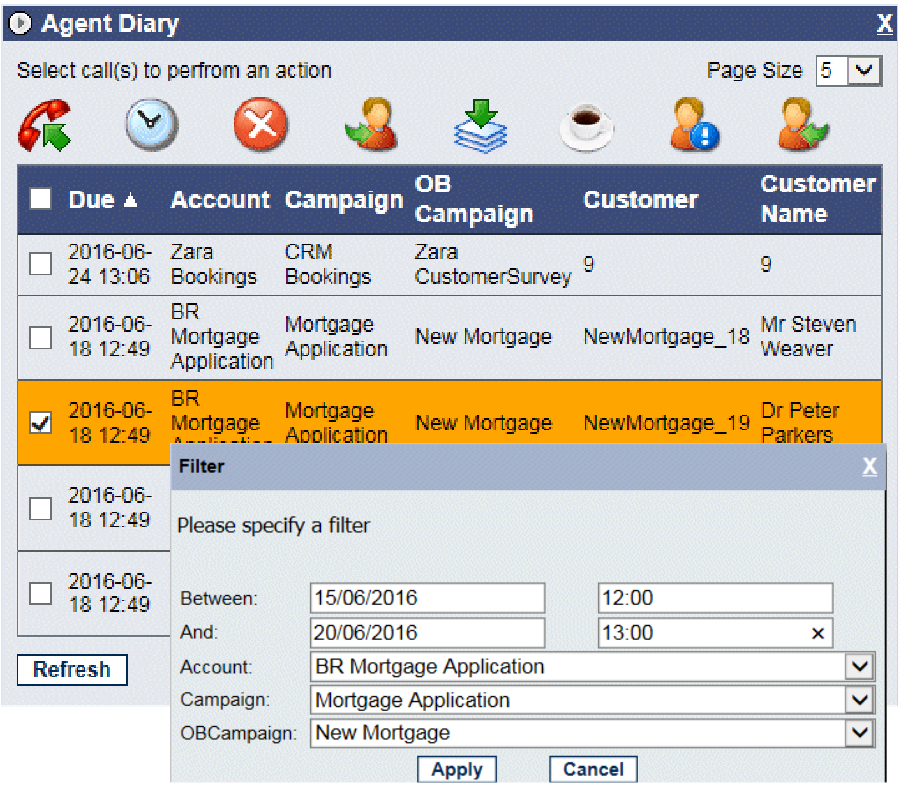
By default, a call can only be reassigned to agents that are members of a team which also contains the outbound list associated with the selected record.

To allow the re-assignment of calls to any agent, regardless of team membership, please contact the Noetica technical support with the request to enable this functionality.

Filter

If you wish to view selected calls only, use the ***Filter*** option to specify the date and time, account, campaign and outbound list that you wish to display.

- Click the ***Filter***  icon, to open the Filter dialog.
- Enter the **date** and ***time*** for your filter into the *Between:* and *And: fields*.
- Select the ***Account, Campaign and Outbound list*** (OBCampaign) that you wish to display from the drop down menu.

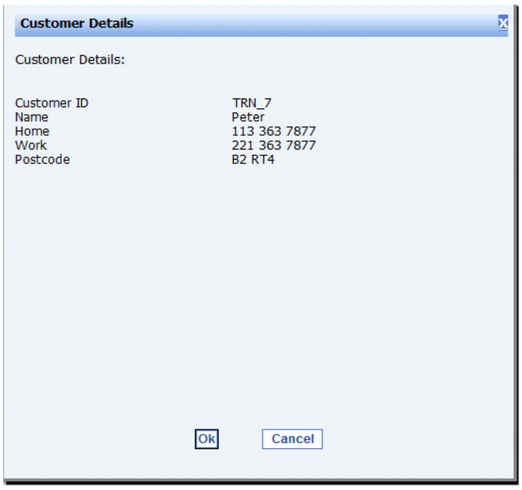


- Click *Apply* to display the filtered calls only.
- Click *Cancel* to close the Filter dialog without saving the changes.

Details

To view customer details of a selected call

- Select the record that you wish to view, then click the ***Details*** icon.

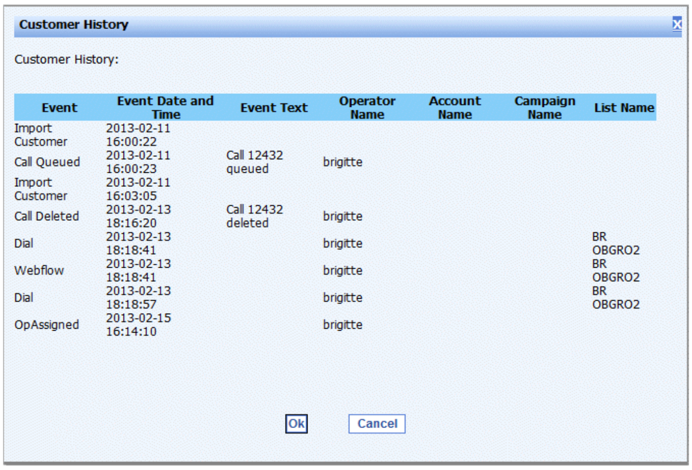


In the ***View Details*** dialog now displayed you can view the customer details associated with the selected call.

History

To view history events of a selected call

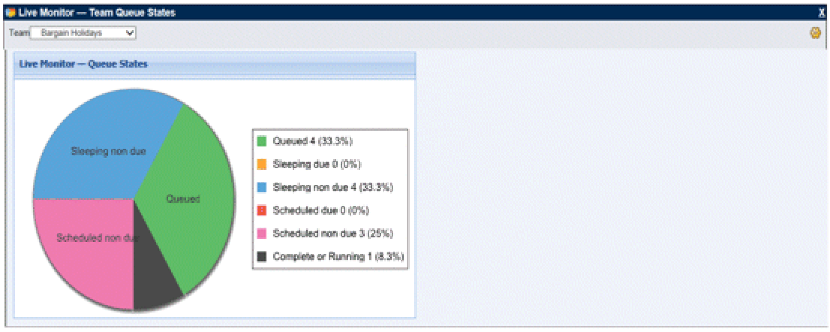
- Select the relevant record, then click the ***History*** icon.



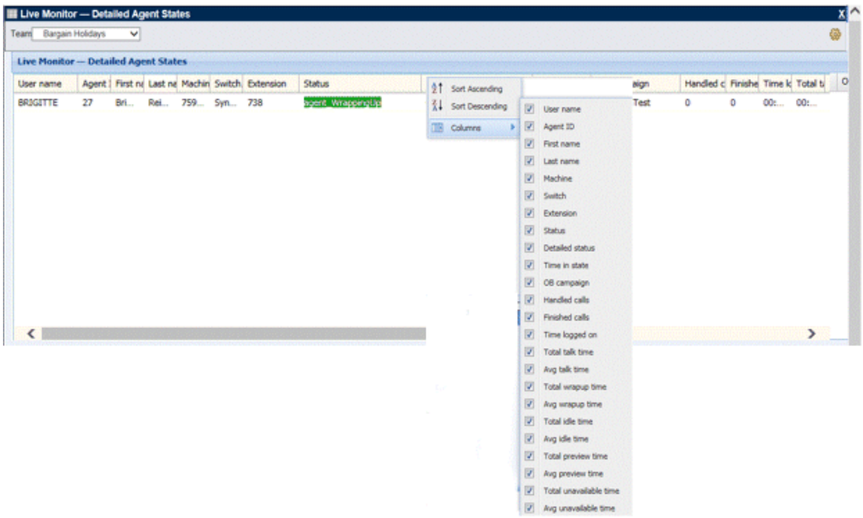
In the ***History for the customer*** dialog now displayed you can view history events associated with the selected call.

LIVE MONITOR WEB PARTS

Queue Distribution



Agent State



The Live Monitor

The *Synthesys Live Monitor* web parts in the Synthesys.Net Portal allow Supervisors with access permission to view *real-time* information of the Agent State and the Queue distribution for a selected team.

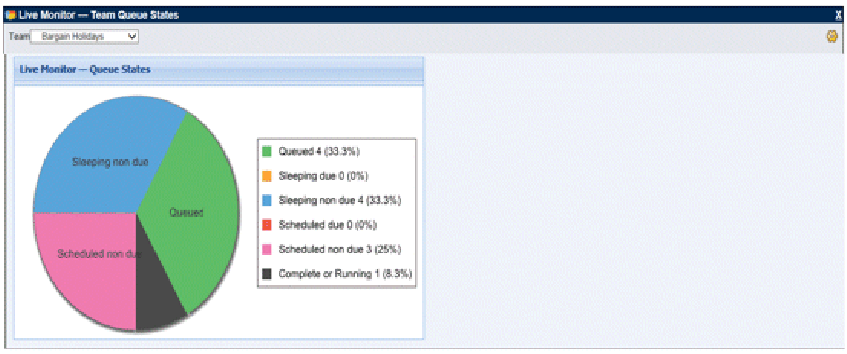
Team based security ensures that users can only select and view teams of which they are a member, or teams for which they are the team manager and sub teams to the team of which the user is the team manager.

To add the Live Monitor web part to the Synthesys Portal

- Click on the **Settings** icon at the top right of the Synthesys.Net Portal screen, and select **Catalog**.
- In the *Catalog* page tick the options **Live Monitor – Queue States** and **Live Monitor – Detailed Agent States,** as required.
- The selected options will be displayed as a Web Part in the portal.
- From the respective Team drop down menus select the relevant team to view Detailed Agent ***States*** and ***Team Queue States***.

Queue Distribution

The **Live Monitor – Queue States dialog** shows, visually in a graph, the number and percentage of Queued, Sleeping due, Sleeping non due, Scheduled due, Scheduled non due, Complete or Running calls.

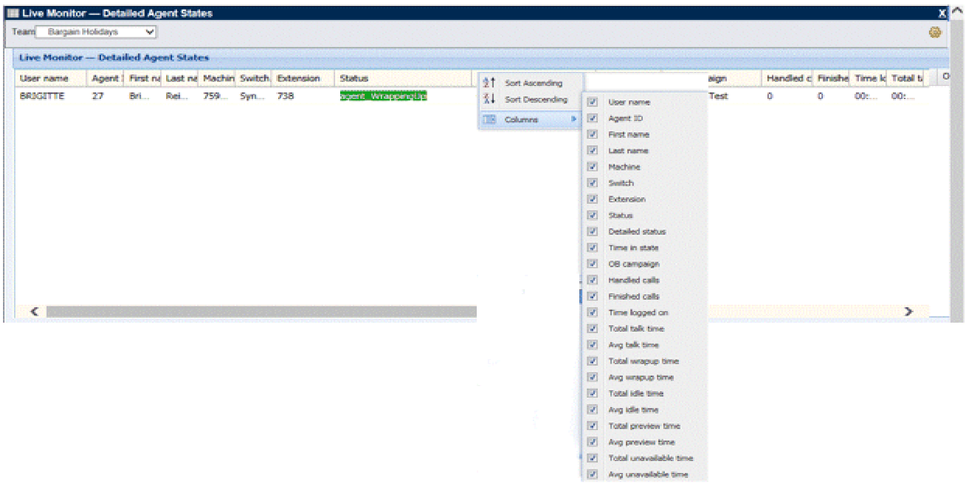


Please see next page for options available for the **Live Monitor – Detailed Agent States.**

Detailed Agent States

The **Live Monitor – Detailed Agent States dialog** shows details of the agents logged on to the Synthesys.Net Portal, the switch used, extension number and call statistics.

- To choose which columns to displayed **and in which order, click *on*** one of the column headings, to display the options ***Ascending, Descending*** and ***Columns***.
- When selecting **Columns,** you can tick the columns for which you want to display information, and un-tick the columns that you wish to hide from view.
- Selecting ***Ascending*** or ***Descending,*** you can sort the information displayed in Ascending or Descending order.



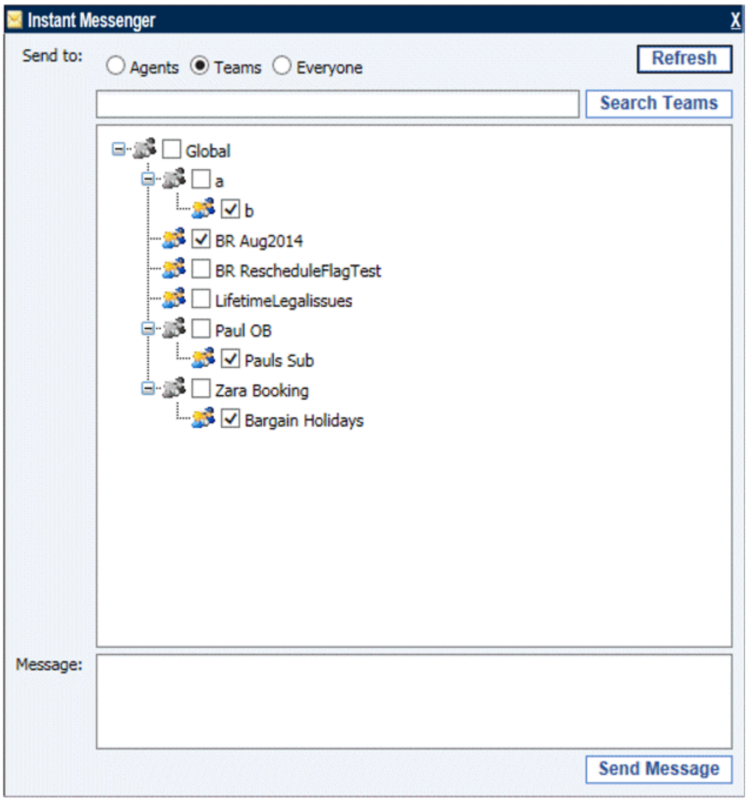
The detailed agent state option is available for the selected team and shows real time statistics for all agents logged into the Synthesys.Net Portal.

Option	Displays:
User Name	The name used to log on to Synthesys.
Agent ID	The agent’s ID, as allocated in Synthesys Personnel.
First Name	The agent’s first name, as entered in Synthesys Personnel.
Last Name	The agent’s surname, as entered in Synthesys Personnel.
Machine	The name of the workstation.
Switch	The name of the switch / PBX used.
Extension	The extension number for the workstation.
Status	The current status of the agent, i.e. ‘Waiting’ ‘Previewing’ etc.
Detailed Status	The current agent state (‘Available’; ’Unavailable – Break’) or the agent’s progress within a campaign, showing the campaign and current section name, or ‘Wrap-up’ when the agent has reached the conclusion window.

Detailed Agent States continued

Option	Displays:
Time in State	How long agents have been in the current Status.
OB Campaign	The name of the Outbound list currently allocated to the agent.
Handled Calls	All calls that the agent has taken. Aborted I/B calls are displayed as completed calls, aborted O/B calls show the selected aborted type.
Finished Calls	All Inbound and Outbound calls that an agent has completed, but NOT the aborted O/B calls.
Time Logged On	The time an agent has logged on and accessed ‘Start Work’.
Total Talk Time	The length of time an agent is both, connected on the phone and in a Synthesys Webflow.
Avg Talk Time	The average length of time the agent is connected on the phone and in a Synthesys Webflow (ONLY THE FIRST DIAL IS COUNTED HERE, ANY SUBSEQUENT DIALS ARE COUNTED IN WRAP).
Total Wrap-up Time	The total time when an agent is not both on the phone and in a script following a dial, whether the dial results in a connected call or not, plus any switch wrap up time.
Avg Wrap-up Time	The average time when an agent is not both on the phone and in a script following a dial, whether the dial results in a connected call or not, plus any switch wrap up time.
Total Idle Time	The total time between an agent ending wrap up status and getting the next screen pop.
Avg Idle Time	The average ‘Idle Time’ between an agent ending wrap up status and getting the next screen pop in any one session.
Total Preview Time	The total time an agent is in a Synthesys Webflow BEFORE the call is connected.
Avg Preview Time	In average length of time an agent is in a Synthesys Webflow BEFORE the call is connected.
Total Unavailable Time	The total time of an agent being unavailable to take calls in any one session.
Avg Unavailable Time	The average time of an agent being unavailable to take calls in any one session.

INSTANT MESSENGER



The Instant Messenger

The **Instant Messenger** is a portal web part that allows users with the relevant permissions to send messages to other users currently logged into the Synthesys.Net Portal.

The message can contain a maximum of 200 characters. The text box can’t be left empty, else an appropriate error message is displayed. Any html tags are stripped from the text.

Messages sent will pop up at the bottom right hand corner of the Portal or webflow screen and will be deleted automatically once the message has been read and is closed.

Details of messages will be stored in the Phoenix Audit table, including information about who has sent a message and to whom it was sent, the date it was sent and from which machine, and the content of the message.

To access details of the Phoenix_Audit table, you need to either query the table directly, or write a report to analyse audits for instant messages.

Users who don't have permissions to send messages are still able to add the Instant Messenger web part to their portal via the Catalog and to receive messages, but the message text box and send message button will be disabled.

The message text box will contain a message explaining that they do not have the correct permissions to send messages.

By default, only users assigned the role of Administrator in Synthesys Management can send messages. If you require any other user roles, apart from Administrator to be able to send messages, please contact the Noetica technical support desk.

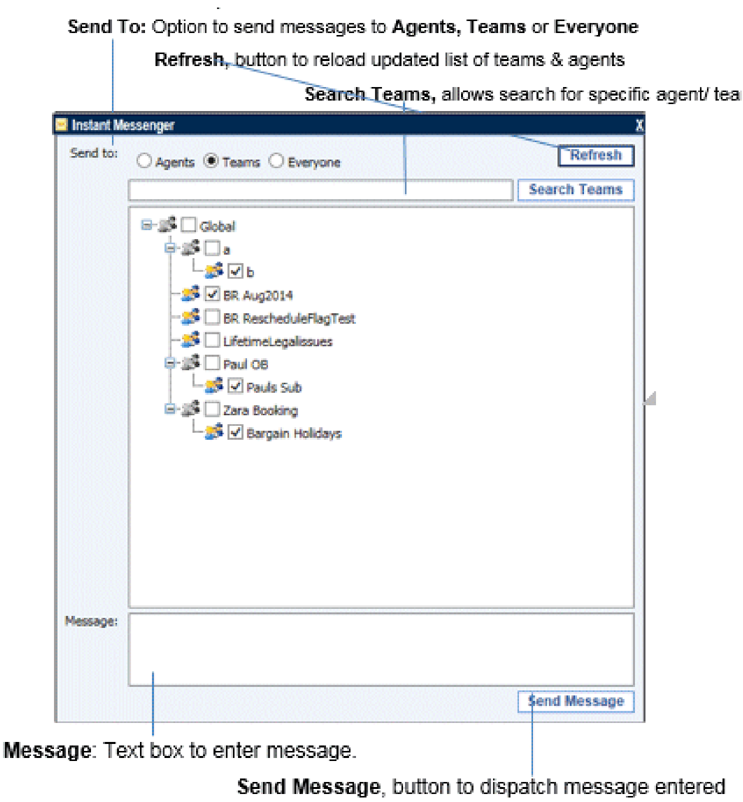
If permissions are changed, users will have to remove and re add the Instant Messenger web part to get the updated setting.

Adding the Instant Messenger

The **Instant Messenger** is a portal web part that allows users with the relevant permissions to send messages to other users currently logged into the Synthesys Portal.

To add the Instant Messenger web part to the Synthesys.Net Portal

- Go to the **Settings** icon at the top right of the Synthesys.Net Portal screen and select *Catalog.*
- In the Catalog page, tick the **Instant Messenger** check box.
- Click the **Add** button, to add the Instant Messenger to the Portal.



By default, only users assigned the role of Administrator in Synthesys Management can send messages. If you require any other user roles to be able to send messages, please contact the Noetica technical support desk.

If permissions are changed, users will have to remove and re add the Instant Messenger web part to get the updated setting.

Users without permissions to send messages are still able to add the Instant Messenger web part to their Portal to receive messages, but the message text box and send message button will be disabled. The message text box will contain a message explaining that they do not have the correct permissions to send messages.

Sending Permissions

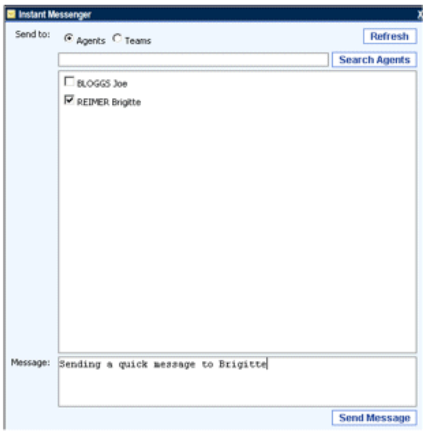
Depending on the user role and permissions assigned to the individual in Synthesys Management, instant messages can be send to '**Everyone'** currently logged in to the Synthesys.Net Portal, or to selected **Agents** and **Teams**.

Sending option	Description
Agents	Shows a list of agents currently logged in to the Synthesys.Net Portal, with a checkbox for selection. Administrators can send a message to all or selected logged on agents. Other users will see a filtered list, showing only the logged on agents in their teams or sub teams, or agents in teams of which they are the team manager.
Teams	Shows a tree structure of teams with currently logged in users. The team and/or sub-team icons are displayed in colour if any of the users currently logged on to the Synthesys.Net Portal are present in that team. Administrators see all teams with logged in agents, other users can only see, select and send messages to users in their teams and sub teams, or to users in teams of which they are the team manager.
Everyone	This option is only available to Administrators and is used for sending a message to all logged in users.

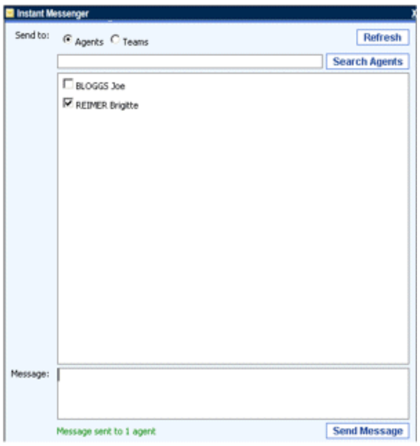
Sending Messages

To send a message, either to everyone currently logged in to the Synthesys.Net Portal (option only available to Administrators), or to selected teams or agents:

- Go to ***Send To*** at the top of the Instant Messenger screen and select either **Agents, Teams or Everyone**.
- Use the **Search** field, to locate a specific agent (A**gents** option), or a specific team (**Teams** option). When selecting '**Everyone',** the **Search** is disabled, as the message will go out to all users currently logged in.
- Select the users or teams that should receive your message.



- Type the details into the **Message** field (max. 200 characters, Html tags will be stripped from the text).
- Click the **Send Message** button to send the message.



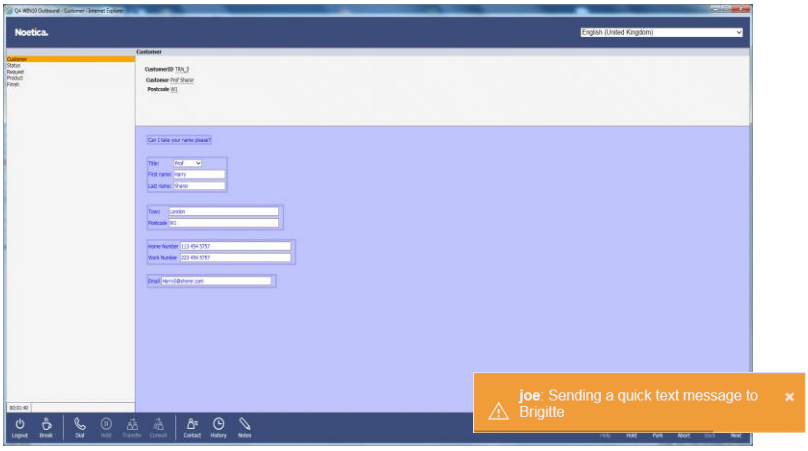
- The confirmation 'Message sent to xx recipients' will be shown to the sender at the bottom of the Instant Messenger screen.

The message that you send can contain a maximum of 200 characters. The text box can't be left empty, else an appropriate error message is displayed. Any html tags are stripped from the text.

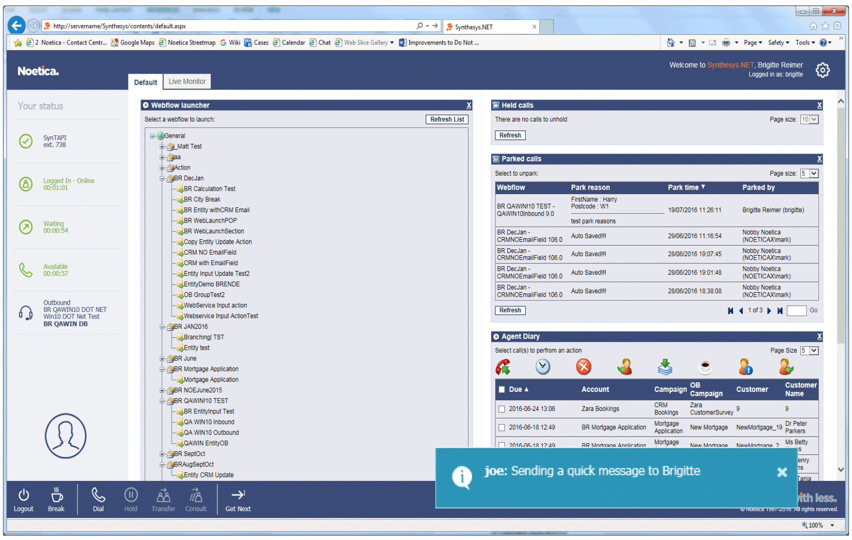
Receiving Messages

The dispatched message will appear at the bottom right of the Portal screen, allowing the selected users or team members currently logged into the Synthesys.Net Portal to read the information.

If users receiving a message are currently in a webflow taking calls, the message will appear briefly, to notify users of the incoming message.



- Finish the call, to return to the Portal page, where the message is still displayed.
- When you have read the information, click the cross on the right hand side of the message to close and delete the message.



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