MONITOR & MANAGING FUNCTIONS

Live Monitor & Synthesys Switch Monitor



Report Viewer

| 🚰 Report Viewer | | | | | | | | | | | | | - 07 |
|---|---|--|-----------|-------|----------|--------|-------|-------------|-------|--------------|-------|-------------|------------|
| Ne Nanage | | | | | | | | | | | | × | Close Tab |
| Gkbal Agent Breaks Agent Utilization Report Comparison Releases | | Agents/Brighte (Brighte reinver)/Call Summar ect the Date Period [Last/4/veeksToSun | r (Agent) | | | | | | | | | View | Report |
| Duticaund Duese Summay Gal Summay Agent) Cal Summay (Campaign) | | Agent Summary Last4WeeksToSun | | | | | | | 2 | | | | |
| Aperil (speril speril) Aperil (speril) Aperil (speril) Aperil Natornalic) Aperil Dickion Report Aperil Dickboard Aperil Dickboard Aperil Dickboard | | Agent Name: Brigitte reimer 10 | 12 | : 8/ | 9/20 | 109 | 10: | 9/ | 5/20 | 109 | | | |
| Call Summary (Agent) Daroll (D Noore) E- B eliot (E Littlechild) | | | | | | Concl | luded | | | | A | sorte | - |
| A Matin (Matin Beale) A Matin (Matin Beale) A Matin (Matin Beale) Concording the second se | | | | ORDER | BATHOCKE | ANST N | PHONE | LIT N CREWL | Total | ORVING INDIA | OTHER | RESOLETIONE | NEVER CALL |
| | | DemonstrationandTrainingScripts - Loanapplication | Inbound | | | | | | | | 2 | | |
| Pelebusness California - ElectroBuy Telebusiness California - ElectroC8 | COB C | | Total | | | | | | | | 2 | | |
| Telebusiness Californs - ElectroFault | | DemonstrationandTrainingScripts - SwittLitts | Inbound | | | | | 3 | 3 | | 3 | | |
| | | | Total | | | | | 3 | 3 | | 3 | | |
| | | Inbound | | | | | | | | 1 | | | |
| | | | Total | | | | | | | | 1 | | - |
| | | Teletusiness Califlows - BectroBuy | Inbound | 3 | 6 | 2 | | | 10 | | 16 | | |
| | | | Total | 3 | 6 | 2 | | | 10 | | 16 | | |
| | | Telebusiness California - DectroCB | CBout | | | | 2 | | 2 | 1 | | 4 | 1 |
| • • | | | | _ | _ | | | | | | | | - |

Call Blending & Synthesys Switch Manager

| leip | | | |
|---|--|--|--|
| All Teams | Teams Agents | in BR Order Last Message Actions Graph | |
| - BR Enquiry | Name | State | |
| - Global - SNoDrop1 - SNoDrop2 - transfer team | Ana Andrew Automatic Brigitte Christ Clais ScottC SiegmundK CaseyM Darrol ElizabethB GayM GrahamS GraparyB Jem Jo | 1/8 Busy 1/8 Busy 1/8 Busy 1/8 Busy 1/8 Waing for call 0/8 → 1/8 0/8 h Call 0/8 h Call 0 h | |
| | REN | Not Reach | |
| | BEN | Not Ready | |



All rights reserved

The contents of this documentation (and other documentation and training materials provided), is the property of Noetica and is strictly confidential. You may not reproduce any part of this document without the prior consent of Noetica.

We believe that the information in our documentation and training materials is reliable, and we have taken much care in its preparation. However, we cannot accept any responsibility, financial or otherwise, for any consequences (including loss of profit, or indirect, special or consequential damages) arising from the use of this material. There are no warranties that extend beyond the program specification.

You must exercise care to ensure that your use of the software is in full compliance with laws, rules and regulations of the jurisdictions with respect to which it is used.

The information contained in this document may change. We may issue revisions from time to time to advise of changes or additions. We operate a policy of constantly improving and enhancing our application software. There is a possibility, therefore, that the format of screen displays and printed output shown in this documentation may differ slightly from that provided in the software. It is our policy to update this documentation whenever a major release of software takes place.

Synthesys.Net Monitor Functions

Software Release Version 5.1

Document Version: 1.4

Last updated July 2017

Notes prepared by Brigitte Reimer

Synthesys is a registered trademark of Noetica.

Microsoft is a registered trademark and Windows is a trademark of the Microsoft Corporation in the USA and other countries.

All other trademarks recognised.

© Copyright 2017 Noetica



SYNTHESYS MONITOR FUNCTIONS

| SYNTHESYS LIVE MONITOR | 6 |
|--|----|
| Introduction | 6 |
| The Synthesys Live Monitor Main Screen | 7 |
| Live Monitor Directory | 8 |
| Available Tab Options | 9 |
| Terminology | 10 |
| OB Campaigns/ Campaign Group Options | |
| Detailed Agent States Option | |
| Call Details | 15 |
| Queue Distribution | 16 |
| Agent State | |
| Handled Call Results | 17 |
| Dialler Results | 17 |
| Dialler | |
| Licensing | 19 |
| NOETICA VOICE PLATFORM: SWITCH MONITOR | |
| Introduction | |
| The Status Screen | |
| Status Screen Options | |
| The Agent Screen | |
| The Call Screen | |
| The Monitors Screen | |
| Clear All | |
| Call Monitoring | |
| Call Monitoring Details | |
| THE SYNTHESYS REPORT VIEWER | |
| Introduction | |
| Starting the Report Viewer | |
| Viewing Reports | |
| Entering Date Period parameters | |
| Adding new SQL Reports | |



| SYNTHESYS CALL BLENDING | . 36 |
|---|------|
| Introduction | . 36 |
| Opening the Blending Manager | . 37 |
| Blending Settings | . 38 |
| Active Blending Settings | . 39 |
| Teams | . 40 |
| Agents in All or Selected Teams | . 41 |
| Last Message | . 42 |
| Actions | . 42 |
| Graph | . 43 |
| NOETICA VOICE PLATFORM: SWITCH MANAGER | . 46 |
| Introduction | . 46 |
| DDI ASSIGNMENT | . 47 |
| INBOUND STRATEGIES | . 48 |
| Strategy | . 48 |
| Agent Routing | . 49 |
| Routing | . 50 |
| Route End | . 51 |
| Active Times | . 52 |
| Call | . 53 |
| Emergency Drill | . 54 |
| IVR STRATEGIES | . 56 |
| Strategy | . 56 |
| Digits | . 57 |
| Active Times | . 58 |
| Emergency Drill | . 59 |
| Call Recording | . 61 |
| THE STRATEGY EDITOR | . 62 |
| AGENT ASSIGNMENT | . 63 |
| NOETICA VOICE PLATFORM & OUTBOUND CALLING | . 64 |
| Noetica Voice Platform Outbound List Properties | . 64 |
| Noetica Voice Platform Outbound List Properties | . 64 |



SYNTHESYS LIVE MONITOR

Queue Distribution



Agent State





SYNTHESYS LIVE MONITOR

Introduction

The core function of the *Synthesys Live Monitor* is to provide *real-time* information of call centre activities for call centre supervisors and managers.

You can view the current state of all live campaigns that are running and observe individual agent activity within your call centre in real-time.

Detailed data statistics are displayed for the individual teams, campaigns, Outbound lists and Outbound groups, agents and the dialler, with information about Queue distribution, Agent State, Handled Call Results and Dialler Results being visually represented in graphs.

The data shown includes, for example, the average agent talk time and you can see how long an agent takes on a particular section of a callflow. This allows you to identify problem areas or congestion points within a callflow, which can be refined in the Campaign editor, to improved performance.

The performance monitor works on the .net framework, and additional software may need to be installed before the monitor will work correctly.



The Synthesys Live Monitor Main Screen

To open the Live Monitor:

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

Using the Live Monitor, you can view the current state of all live campaigns that are running and observe individual agent activity within your call centre in real-time.

| Menu Bar Ta | ab Options | | | | Data Statistic | s | | |
|-----------------------------|--------------------------------|---------------|---------------|-------------------|-------------------------|----------|-------------|----------------------|
| Synthesys Live Monitor | | | | | | | C | - 0 <mark>- X</mark> |
| File | | | | | | | | |
| E-Live Monitor | OB Campaigns Queue Dis | tribution Cal | l Details Har | dled Call Results | Dialler Results | | | |
| i Teams | | | | | | | | |
| Campaigns | Name | ID | Type | Auto Dial | Active | Priority | Dial Prefix | Customer Pn |
| All Campaigns | BR May 2015 Group | 1/2 | Proview | Falso | Activated /Active | 5 | Diarriolat | Contraction |
| 🕀 Alistair - AWCityBreak 🗉 | AWCtoOB | 112 | Preview | False | Activated/Active | ۲, I | | AWCITY |
| Alistair - AWMarketing | New CRMOB1 | 143 | Preview | False | Activated/NotActive | 5 | | BNMCRM |
| Alistair - AWTestingTrainin | BR TestOB Pop | 111 | Preview | False | Deactivated | 10 | | BPOENT |
| - Allianz - LMCity Break | cti TESTING | 136 | Preview | True | Activated/Active | 5 | 7 | CCC |
| Allianz - LS City Break | TD WrongNR | 43 | Preview | False | Deactivated | 5 | | CITYOB |
| Allianz - LSMarketingOB | City Outbound | 2 | Preview | True | Deactivated | 10 | | CITYOB |
| Allianz - MarketingCRMOB | DTS OB | 47 | Preview | False | Deactivated | 5 | | DTSCRM |
| avato - citybreak | BRWronrNum | 56 | Preview | False | Deactivated | 5 | | DTSCRM |
| avato - DTCityBreak | CBout | 1 | Preview | False | Deactivated | 5 | | ELECT |
| avalo - D rolybleak | OB1 | 137 | Preview | False | Activated/Active | 0 | | MATTB |
| alvalo - dii markeurig | OB2 | 138 | Preview | False | Activated/NotActive | 5 | | MATTB |
| arvato - D I Marketing | IstBR OB2 | 14/ | Preview | False | Expired | 5 | | MAYCRM |
| arvato - PEH City Break | May Test FileSQI | 141 | Preview | True | Deactivated[]/NotActive | 5 | | MAYCRM |
| arvato - PEH Marketing | May TestOB May OP Wrong Nr. | 139 | Preview | Falso | Deactivated[]/Active |) 5 | | MATCRM |
| arvato - TP City Break | Wrong Number | 92 | Preview | False | Deactivated | 5 | | NOFTST |
| arvato - TPMarketing | Noe Test | 90 | Preview | False | Deactivated | 5 | | NOFTST |
| 🕀 Camelia - Camelia CRM | SuOBTest | 70 | Preview | False | Activated/Active | 5 | | SUE |
| 🚊 Campaign Groups | | | | . 500 | | | | |
| BR May2015 Group 👻 | | hanananan | | | | | | + |
| | | | | | | | | |

Live Monitor Directory



Live Monitor Directory

The Synthesys Live Monitor Directory shows a tree structure. Using the category headings *Teams, Campaigns, Agents, Dialler* and *Licensing*, detailed data statistics can be displayed for the individual teams; campaigns, outbound lists and outbound groups, agents and the dialler and licensing arrangements can be viewed.

To display the available options:

- Click on the 🗄 sign next to the Live Monitor caption.
- Click on the 🖶 sign next to Teams and Campaigns respectively, to display a list of all teams and campaigns, including the Outbound lists and outbound groups set up on the Synthesys system.
- Click on the
 definition of the sign next to Agents, to display all agents currently logged on to Synthesys and in the Start Work screen.
- Select Dialler, to view dialler statistics.
- Select Licensing, to view the current Synthesys and Predictive Dialler licensing arrangements.

Selecting the individual team, campaign, outbound list/ outbound group or agent, you can view the corresponding detailed data statistics.



Available Tab Options

The Live Monitor displays detailed data statistics for the individual Teams, Campaigns, Outbound lists and Outbound groups, Agents and the Dialler.

| Option | Displays: |
|--------------------------|--|
| OB Campaigns | Detailed statistics for Outbound lists. This option is available on Team and Campaign level. |
| Queue Distribution | A graph showing queue details. This option is available on Team, Campaign and Outbound list/ Campaign group level. |
| Agent States | A graph representing the different Agent States. This option is available on Team, individual Campaign & Outbound list/ Campaign group and 'All Agents' level. |
| Detailed Agent States | Real time statistics for all agents. This option is available on Team, individual Campaign & Outbound list/ Campaign group and 'All Agents' level. |
| Call Details | Shows detailed call statistics of all calls completed in the current user session. This option is available on Team, Campaign, Outbound list/ Campaign group and Agent level. |
| Current Call Details | Shows Customer details of the call in progress. Supervisors can follow the advancement of the call, with section names and time spent in each section displayed and supervisors can view history events associated with a customer. |
| Handled Call Results | A graph showing all Handled calls in 'real time', including the Call Results. This option is available on Team, Campaign, Outbound list/ Campaign group and Agent level. |
| Dialler Results | A graph showing dialler result details. The option is available on Campaign and Outbound list/ Campaign group level. |
| Factor details | Displays the factor details, i.e. the value used to calculate how many calls to dial on a predictive campaign. This option is available on Outbound list/ Campaign group level. |
| Group Summary | Detailed statistics for Outbound groups. This option is available on Campaigns Group level, located under the Campaigns level, as part of the All campaigns options. |
| CTI Details | Displays details of the Predictive Dialler and the Switch. This option is available on the Dialler level |
| Licensing | View current Synthesys and PD licensing arrangements. This option is available on the Licensing level. |



Terminology

| Term | Definition |
|------------|--|
| Talking | Refers to agents taking calls, with the 'talking' state starting as soon as the telephone becomes unavailable, for example, when agents press the dial button or even just take the phone of the hook. |
| Talk Time | The time when the agent starts the 'talking' state, or is actually connected on the phone and still in the script. (ONLY THE FIRST DIAL IS COUNTED HERE, ANY SUBSEQUENT DIALS ARE COUNTED IN WRAP) |
| Previewing | Starts when the agent is in the script BEFORE entering the 'talking' state or being connected. |
| Connected | The term connected refers to the point when the Synthesys CTI interface receives a notification from the switch that the agent is no longer available. There may be a variation of up to 1 second between the call being connected and the Synthesys CTI interface being notified by the telephone switch. |
| Wrapping | Starts when an agent is no longer both on the phone and in a script following a dial, regardless of whether or not the dial results in a connected call. |
| Wrap Time | Starts when the agent enters the 'wrapping state' plus any switch wrap up time (set in the inf file Default 2 seconds). |
| Idle Time | The time between an agent ending wrap up state and getting the next screen pop (except for the first call of the day, where it is from the log in to the first screen pop. |



OB Campaigns/ Campaign Group Options

The *OB Campaigns Option* is available on Team and Campaign level and shows detailed statistics of your Outbound lists and Outbound groups.

| Option | Displays: |
|-------------------------|--|
| Name | The names of the Outbound lists/ OB groups. |
| ID | The Outbound list/ OB group ID's. |
| Туре | Type of Outbound list/ OB group: 'Preview or Predictive'. |
| Auto Dial | True or False, depending if Auto Dial is activated or not. |
| Active | Activated/ Active = the OB list is activated and on active times; Activated/ Not Active = the OB list is activated but outside of its active times; Deactivated = the OB list is deactivated; Deactivated[*]/Active = the OB list is deactivated, but on active times in at least one OB Group using Group settings (i.e. 'Use Campaign State' is NOT ticked); Deactivated[*]/Not Active = the OB list is deactivated and outside of its active times in at least one OB Group using Group settings (i.e. 'Use Campaign State' is NOT ticked); Expired = the OB campaign has expired, i.e. it is past the end date specified using the Campaign Expires option. |
| Priority | The priority rating of the Outbound list/ OB group: Low = 0; High = 10 |
| Dial Prefix | The initial number (i.e.'9') used to dial out. |
| Customer Prefix | The customer prefix of the CRM. |
| Idle Agents | The number of agents waiting' in 'Start Work' without currently taking calls. |
| Expected Free Agents | The number of agents that the dialler expects to be free within the average connect time for the campaign. |
| Unavailable Agents | The number of agents in 'Start Work', but currently not available to make or take calls (i.e. 'On Break'). |
| Previewing Agents | The number of agents previewing calls. |
| Talking Agents | The number of agents in the taking state, with 'talking' starting as soon as the telephone becomes unavailable, i.e. agents press the dial button or begin to dial, or even just take the phone of the hook. |
| Wrapping Agents | The number of agents in the process of completing calls, from clicking OK in the conclusion window of a Callflow to hanging up the phone, or from hanging up the phone to clicking OK in the conclusion window of a Callflow. |



OB Campaigns Option continued

| Option | Displays: |
|---------------------|---|
| Total Agents | The total number of agents available to take calls. |
| Avg Idle Time | The average time an agent is waiting in 'Start Work' without being in the talking state, in any one session. |
| Queued Calls | The total number of calls queued in the Outbound Manager. |
| Sleeping Calls Due | The total number of sleeping calls due to be taken. |
| Rescheduled Calls | The total number of rescheduled calls due to be taken. |
| Calls in Hopper | The total number of calls in the Dialler cache. |
| Total Calls Worked | A count of predictive dials, plus preview records handed to agents. |
| Calls To Make | The total number of predictive calls that the Dialler has calculated it needs to make for an Outbound list/ OB group. |
| Calls Requested | The actual number of calls the dialler requests the CTI layer to make. |
| Max NC Rate | The maximum nuisance % rate acceptable for predictive Outbound list/ OB group. |
| Current NC Rate | The current nuisance % rate for the predictive Outbound list/ OB group. |
| Current SR | The current success rate (SR) in percent (%) of calls that are given to the agents. |
| Avg Connect | The average time it takes for predictive dialled calls to be connected. |
| Trunks Allocated | The number of lines allocated for predictive dialling. |
| Next Start Time | The next time the campaign becomes live based on the active time settings in the Synthesys Outbound Manager. |
| Next End Time | The next time the campaign is due to finish based on the active time settings in the Synthesys Outbound Manager. |
| Estimated Time left | The estimated time the campaign runs out of call data, based on the number of records still to be worked, the number of agents and the average duration of the calls. |
| Weight | Weighting set for the Outbound groups to determine the number of calls to be taken from a selected Outbound list within a group, before moving to the next. |



Detailed Agent States Option

This option is available on Team, individual Campaign, Outbound list, Campaign group and 'All Agent' level and shows real time statistics for all agents.

| 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' once the agent has reached the conclusion window. |
| 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 Callflow. |
| Avg Talk Time | The average length of time the agent is connected on the phone and in a Synthesys Callflow (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 <u>not</u> 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. |



Detailed Agent States continued

| Option | Displays: |
|---------------------------|---|
| Avg Wrap-up Time | The average time when an agent is <u>not</u> 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 callflow BEFORE the call is connected. |
| Avg Preview Time | In average length of time an agent is in a Synthesys callflow 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. |



Call Details

This option is available on Team, Campaign, Outbound list, Campaign group and Agent level and shows call statistics of all calls completed in the current user session.

| Option | Displays: |
|-------------------------------|--|
| User Name | The name of the user logged into Synthesys. |
| Sequence ID Customer ID | The unique ID for the completed call in the current user session. The Customer ID (CRM Prefix) of the completed call. |
| Call Type | 'Inbound' or Outbound', depending on whether it was an Inbound or Outbound list. |
| Call Result | The outcome of the call. Finished calls display the Call Results, as set up in the conclusion flags in the Callflow Editor; aborted calls show the aborted type, i.e Rescheduled; Phone engaged; etc. |
| Campaign | The name of the campaign. |
| OB Campaign Queue ID | The name of the Outbound list. The Queue ID of an Outbound list (or IB for an Inbound call). |
| Time Started Time Finished | The date and time the call started. The date and time the call finished. |
| Preview Time | The length of time an agent was in a Synthesys callflow BEFORE the call was connected. |
| Talk Time | The time the agent was in the talking state and in the Synthesys Callflow. (ONLY THE FIRST DIAL IS COUNTED HERE, ANY SUBSEQUENT DIALS ARE COUNTED IN WRAP) |
| Wrap Time | The time when an agent spent <u>not</u> 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 (set in the inf file Default 2 seconds). |
| Total Time | The total time it took the agent to take a call, from the time of the Callflow pop, including preview time, dialling, talk time and wrap-up time, to the point at which the agent was available again to take the next call. |
| Idle Time | The time spent between the agent ending the wrap up state and getting the next screen pop (on the first call of the day from login until the first screen pop. |



Queue Distribution

This option is available on Team, Campaign and Outbound list and Campaign group level, displaying a graph showing queue details.



Agent State

The option is available on Team, individual Campaign, Outbound list, Campaign group and 'All Agent' level, displaying a graph representing available Agent States.

| 🛃 Synthesys Live Monitor | | | | | | | _ 🗆 🗵 |
|--|--------------|-----------------------|-----------------------------|---------------------|---|--------|-------|
| Elle - Live Monitor - Teams - Campaigns - Agents | Agent States | Detailed Agent States | Call Details Handled Call | Results | | | |
| Brigitte Brigitte joe Dialler | | | | | 1 | | |
| | | | | Agents Logged On | 3 | | |
| | | | | Agents Talking | 0 | 0.00% | |
| | | | | Agents Wrapping Up | 0 | 0.00% | |
| | | | | Agents Previewing | 1 | 33.33% | |
| | | | | Agents Waiting | 0 | 0.00% | |
| | | | | Agents Unavailable | 2 | 66.67% | |
| | | | | Inbound Only Agents | 0 | 0.00% | |
| | | | | | | · | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |



Handled Call Results

This option is available on Team, Campaign, Outbound list, Campaign group and Agent level, displaying a graph showing all Handled calls in 'real time', including the Call Results.



Dialler Results

This option is available on Campaign, Outbound campaign and Campaign group level and displays a graph showing dialler result details.





Dialler

CTI Details displays details related to the Predictive Dialler and the Switch.

| Details | | | | | | |
|----------|---------------|-------------|-------------------|------------------|------------------|--------------------|
| Number o | f Switches : | 1 | | | | |
| Switch | CTI Available | Agent Count | Calls In Progress | Trunks Available | Trunks Allocated | Trunks Unallocated |
| Default | True | 1 | 0 | 100 | 0 | 100 |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

| Option | Displays: |
|--------------------------------------|---|
| Switch | The switch agents are logged into; if multi switch is used, the different switches, agents are logged into. |
| CTI Available | True or False, depending on whether or not CTI is available. |
| Agent Count | The number of agents logged into the specific switch. |
| Calls in Progress | The number of predictive calls being dialled. |
| Trunks Available Trunks Allocated | The number of Trunks available for the Dialler on that switch. The number of Trunks allocated to Outbound lists. |
| Trunks Unallocated | The number of Trunks not allocated to Outbound lists. |



Licensing

Selecting the *Licensing* option, you can view the current Synthesys and Predictive Dialler licensing arrangements, including:

| System ID | Shows the System ID that is generated when Synthesys is installed. |
|------------------|--|
| Expiry date | Date the licence expires. |
| Agent limit | Maximum agents that can be logged on at any one time. |
| Currently in use | Number of agents that are currently logged on. |







NOETICA VOICE PLATFORM

THE SWITCH MONITOR

| Synthesys Switch Monitor - SynthesysSwitch Status Agente Calle Monitore Control | | |
|---|--|--|
| Name : brigitte Extension : | 1601 | |
| Phone Status Current Status : Not ready | Permissions Monitor Listen in Barge in Disconnec | t |
| Basic Telephony Number: Recording All Predictive Customer Agent | Currently Mor Name : Extension : Destination : Call Id : | admin 07811353995 02079406738 20141007 11455569D4E006 |



NOETICA VOICE PLATFORM: SWITCH MONITOR

Introduction

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

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

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

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



The Status Screen

To start the Switch Monitor:

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

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

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

| Name : brigitte Extension : | 1601 | |
|--|--|--|
| Phone Status Current Status : Not ready | Permissions Monitor Listen in Barge in Disconnec | t |
| Basic Telephony Number: All Predictive Customer Agent Customer Agent Customer Agent Customer Agent Customer Agent Customer Agent Customer Agent Customer Agent Customer Agent Customer Customer Agent Customer | Currently Mor Name : Extension : Destination : Call Id : | itoring admin 07811353995 02079406738 20141007 11455569D4E006 onitoring |

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

Please see next page for more information.



Status Screen Options

The sections available in the Synthesys Monitor main screen include:

Phone State

| Logging in the phone | Clicking supervis <i>Ready</i> . | Clicking the key icon connects the <i>Noetica Voice Platform</i> to the supervisor phone, when the call is connected then status will turn to <i>Ready</i> . | | | | | | | | |
|-------------------------|--|--|----------------------------------|--|--|--|--|--|--|--|
| Logging out | Click the the Noe Closing phone c module. | Click the key icon with a red cross to disconnect and logout from he Noetica Voice Platform. Closing the <i>Switch Monitor</i> will not disconnect the phone, since the phone can still be in use at the same time by the <i>Synthesys Agent</i> nodule. | | | | | | | | |
| Permissions | To acce Synthes Personn The perio your pho | ss the advanced n ys <i>Run Live Monit</i> iel module. missions ticked sh one system. | nonitorir for perm | ng screens, you need to have the hission, which can be set up in permissions that are available on | | | | | | |
| Basic Telephony | This allo the insta | ows the CTI engine allation of new pho | ers to t ne softv | est extensions after an upgrade or ware. | | | | | | |
| | Number Record Predicti | r: For entering the ing: Tick to detern ive: Tick to call pre | extensi nine the edictivel | on number to be dialled. type of recording file to be created. y, do not tick to test Preview calling. | | | | | | |
| | | Making a call | | Hold a call | | | | | | |
| | | Hang it up | | Unhold a call | | | | | | |
| | | Stop recording | | Resume recording | | | | | | |
| | The call History a | can be recorded, and so needs to be | but is n e locate | ot tagged within Synthesys Call d manually on disk. | | | | | | |
| | Telepho Agents i | ne control should module. | normall | y be done using the Synthesys | | | | | | |
| Currently Monitoring | When m | ionitoring a call, de | etails of | the monitored call appear here. | | | | | | |



The Agent Screen

This shows all the currently logged on agents.

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

| Extension Name Status Call 1601 brighte On call Monitor Stop Monitoring Logout | |
|---|--|
| 601 brigite On call Monitor Stop Monitoring Logout | |
| | |

• To log an agent off, select the Logout option.

The Call Screen

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

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



The Monitors Screen

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

This is a tree of all the entity types that can be monitored. For example below, we have requested to monitor:

- All predictive calls
- All agents with extension 'Lucifer', and
- All Outbound lists.

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

| 🌮 Synthesys Switch Monitor | |
|--|--|
| Status Agents Calls Monitors Control | |
| Call Type International Mobile Outbound Predictive Extension Vucifer Outbound Campaigns Team | |
| Clear All | |
| Initialised | |

Clear All

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

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



Call Monitoring

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

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

Call Monitoring Details

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

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

| Synthesys Switch Monitor - SynthesysSwitch | | | - 0 X |
|--|--|-------------------------|-------|
| Status Agents Calls Monitors Control | | | |
| Name: brigitte Extension: | 1601 | | |
| Phone Status Current Status : Not ready | Permissions Monitor Listen in Barge in Disconnec | t | |
| Basic Telephony | Currently Mor | itoring | |
| Number: | Name : | admin | |
| Deserting | Extension : | 07811353995 | |
| All Predictive | Destination : | 02079406738 | |
| Customer | Call Id : | 20141007 11455569D4E006 | |
| Agent | Stop N | lonitoring | |
| Monitoring admin speaking to 02079406738 | | | |

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

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





Report Viewer

| 🔡 Report Viewer | | | | | | | | | | | | _ 8 | × |
|--|--------|--|--------------------|-------|---------|--------|-------|---------------|------------|------------|---------|-----------|---|
| File Manage | | | | | | | | | | | X | Close Tab | 5 |
| Global Global Gapent Breaks Gapent Utilization Report Gapent Utilization Release Outbound Queue Summary Global Summary (Agent) Gall Summary (Campaign) | Sele | Global\Call Summary (Campaign) | | | | | | | | | Report | | |
| Agents Agents Agent1 (Agent1 agent1) Agent1 (Agent1 agent1) | | Last4WeeksToSun From: 8/9/2009 To: 9/6/2009 | | | | | | | | | | | |
| □ □ </td <td></td> <td colspan="9">Campaign Name: ElectroCB 6</td> <td></td> | | Campaign Name: ElectroCB 6 | | | | | | | | | | | |
| A Darroll - IEM Multi Queue DemonstrationandTrainingScripts - L DemonstrationandTrainingScripts - S didsfds - sssss didsfds - sssss Telebusiness Califlows - ElectroBug Demonstrationandts Telebusiness Califlows - ElectroCB Daller Results | 5 4 | | | PHONE | NOINTER | RESCHE | Total | PHONE ENGAGED | RESCHEDULE | NEVER CALL | FAXTONE | NO ANSWER | |
| Campaign Release | | E CBout | Brigitte reimer | 2 | | | 2 | 1 | 4 | 1 | | | I |
| Call Summary (Campaign) | | | D Moore | 2 | 1 | 4 | 7 | 2 | 8 | 1 | 1 | 1 | |
| 🗄 🦘 Telebusiness Callflows - ElectroFault | | | Matt Bryant | 4 | | | 4 | 1 | | | | | I |
| | | | None Administrator | 1 | | | 1 | 1 | | - | | | |
| | | | Total | 9 | 1 | 4 | 14 | 4 | 12 | 2 | 1 | 1 | |
| | | Inbound | Brigitte reimer | | | | | | | 1 | | | I |
| | | | Matt Bryant | 1 | | | 1 | | | | | | |
| | | | Total | 1 | | | 1 | | | 1 | | | |
| | Exec | cution Date: Friday, September 11, 2009 11 | 57:38 AM | | | | | | | | | | 4 |
| | | | | | | | | | | | | | |



THE SYNTHESYS REPORT VIEWER

Introduction

The Report Viewer is used to add and view SQL reports.

A range of standard SQL reports will be available in the *Report Viewer* as part of the Synthesys installation. Included are for example, the *Agent Utilization*, *Outbound Queue Summary* and *Dashboard* reports.

Your reporting team can design further SQL reports, which you then can add to the *Report Viewer* under the relevant *Global, Agents or Campaigns* categories.



Starting the Report Viewer

To start the Report Viewer:

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



File Options

RefreshTree. To update the list of reports displayed.

Exit. To exit the Report Viewer and return to the Synthesys main screen.

Manage Options



Add Report. To pick up a new SQL report from the server and to display it under the selected categories.

Remove Report. To remove an SQL report from the category lists.



Viewing Reports

To open a report:

- Select the report under the relevant category *Global, Agent* or *Campaign* in the tree structure on the left side of the Report Viewer
- Double click on the report to display report details on the right side of the Report Viewer.



Some reports, for example the Agent Utilization, Outbound Queue Summary and Dashboard reports, will open automatically.

For other reports you need to **specify a date period parameter**, before the report opens, displaying the required information.

| 🔜 Report Viewer | | | | | | | | | _ 8 × |
|---|----------------------------|-------------|-------------|-------------|----------------|-----------------|-------------------|-------------|---------------|
| File Manage | | | | | | | | | 🗙 Close Tab |
| 📮 🔮 Global | Global\Agent Utilization | Report | | | | | | | |
| | Select the Date Period | /eekToDate | eFromSun 💌 | | | | | | View Report |
| Outbound Queue Summary Call Summary | 1 | of 1 | ▶ ₩ ♦ @ | 🛃 🖂 🔲 🛛 | 🔲 🛃 🗧 🕴 10 | 0% - | | Find Next | |
| Call Summary (Campaign) | | | | | | | | | |
| ⊞ 🖁 Agents ⊞ 🕼 Campaigns | | | | | | | | | |
| | | | | | | Agent | Utilisation | | |
| | WeekToDateFromSun | | | | | | | | |
| | | | | | From: | 06/09/20 | 09 To: 11/ | /09/2009 | |
| | | Calls | Logged On | Idle Time | % Idle Time | Preview Time | % Preview Time | Talk Time | %Talk Time |
| | Week: 37 Year : 2009 | 6 | 00:02:19:10 | 00:02:06:18 | 90.75 % | 00:00:12:37 | 9.07 % | 00:00:00:00 | 0.00 % |
| | | 0 | 00:00:01:20 | 00:00:01:20 | 100.00 % | 00:00:00:00 | 0.00 % | 00:00:00:00 | 0.00 % |
| | | 6 | 00:02:17:13 | 00:02:04:21 | 90.62 % | 00:00:12:37 | 9.20 % | 00:00:00:00 | 0.00 % |
| | 09/09/2009 | 0 | 00:00:00:00 | 00:00:00:00 | 0.00 % | 00:00:00:00 | 0.00 % | 00:00:00:00 | 0.00 % |
| | 08/09/2009 | 0 | 00:00:00:37 | 00:00:00:37 | 100.00 % | 00:00:00:00 | 0.00 % | 00:00:00:00 | 0.00 % |
| | □ 07/09/2009 | 0 | 00:00:00:00 | 00:00:00:00 | 0.00 % | 00:00:00:00 | 0.00 % | 00:00:00:00 | 0.00 % |
| | Matt | 0 | 00:00:00:00 | 00:00:00:00 | 0.00 % | 00:00:00:00 | 0.00 % | 00:00:00:00 | 0.00 % |
| | Total | 6 | 00:02:19:10 | 00:02:06:18 | 90.75 % | 00:00:12:37 | 9.07 % | 00:00:00:00 | 0.00 % |
| | Execution Date: 11 Septemb | per 2009 13 | :09:25 | | | | • | | |
| | | | | | | | | | |
| | 1 | | | | | | | | Þ |
| J | | | | | | | | | |

Please see next page for more information.



Entering Date Period parameters

Some reports have been set up to display data for a specified time range automatically, for example the *Agent utilization report*, for others a date period needs to be selected.

To specify the desired date period:

- Select the report that you wish to open in the tree structure on the left side.
- Choose the required date period parameter from the Select a date Period drop down menu.
- Click the View Report button on the top right of the Report Viewer.

The report will open displaying the data for the selected time period.

| 🔜 Report Viewer | | | | | | | | | | _ 8 × |
|---|--|---|------------------------|-----------------------|--------------------|--------------------|-------------------|------------|---------|-----------|
| File Manage | | | | | | | | | X | Close Tab |
| Global Global Global Global Agent Unization Report Garpaign Release Gurbaond Queue Summary Global Summary (Carpaign) Global Summary (Carpaign) Agent Global Summary (Carpaign) Agent Agent Agent (Agent Agent) Agent Agent Agent Agent Adomine(None Administrator) Adomine(Carpaign) Adomine(Carp | Global/Cal Summay (Campaign) Campaign Select the Date Period Select a Value Week To Date Fr Month To Date Last4Week To Date Last4Week STo Last4Week STo Campaign Nan All Dates To Yodz All Dates To Yodz | gns/Telebusiness Califlows - ElectroCB/Cali >>> omSun Sun Sun From: ay erday | Age .ast4 : 8/9/ | ent Su Wee 2009 | umm ksTu To: | ary oSu ∶9/6 | Find n /200 | Next | Viev | ·Report |
| E- Matt (Matt Bryant) | | | C | onclude | d | | | Aborte | ed | |
| Collise Technical Sector Collise Technical Sector Consensationand TrainingScripts - Ma ConsensationandTrainingScripts - Ma ConsensationandTrainingScripts - Sw Collisions Califlows - ElectroBuy Telebusiness Califlows - ElectroCB Telebusiness Califlows - ElectroCB Telebusiness Califlows - ElectroCB | | | PHONE | NOINTER | Total | PHONE ENGAGED | RESCHEDULE | NEVER CALL | FAXTONE | NO ANSWER |
| Campaign Release | CBout Br | rigitte reimer | 2 | | 2 | 1 | 4 | 1 | | |
| Call Summary (Campaign) | D | Moore | 2 | 1 4 | 7 | 2 | 8 | 1 | 1 | 1 |
| Telebusiness Califows - Electro-aut | N6 | att Bryant | 4 | | 4 | 1 | | | | |
| | Ne | one Administrator | 1 | | 1 | | | | | |
| | Т | otal | 9 | 1 4 | 14 | 4 | 12 | 2 | 1 | 1 |
| | ☐ Inbound Br | rigitte reimer | | | | | | 1 | | |
| | N6 | att Bryant | 1 | | 1 | | | | | |
| | Ti | otal | 1 | | 1 | | | 1 | | |
| | Execution Date: Friday, September 11, 2009 11:57: | 38 AM | | | | | | | | F |



Adding new SQL Reports

A range of standard SQL reports will be available in the Report Viewer as part of the Synthesys installation. Other SQL reports can be designed by your reporting team. To add these reports:

- Go the Manage on the Menu bar and select the Add Report option.
- In the Add New SQL Report dialog, enter the Report Name, the URL address for the Report Server and the Report Path

| Add New SQL Repo | rt 🛛 |
|------------------|---------------------------------------|
| Add New S | SQL Report |
| | |
| Report Name | Agent Summary Report |
| Report Server | http://OPERATIONS41/reportserver |
| Report Path | /Standard Reports/Agent Summary Check |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| Clear | OK Cancel |

If the report path entered is incorrect, a message will prompt you to check the path.

Click the *Check* button, to locate the report.

- Next, select the *category* under which the report is to be displayed. Options not relevant for the type of report selected will be disabled.
- Select the *icon* that should be displayed with the report.

| Add New SQL Repor | Add New SQL Report | | | | |
|-------------------|--|--|--|--|--|
| Add New S | SQL Report | | | | |
| Report Name | Agent Summary Report | | | | |
| Report Server | http://OPERATIONS41/reportserver | | | | |
| Report Path | /Standard Reports/Agent Summary Check | | | | |
| | Show for Inbound Show for Outbound | | | | |
| | Show for Agent | | | | |
| | F Show for Global | | | | |
| lcon | I Report | | | | |
| Clear | OK Cancel | | | | |

If you forget to select a category or icon, a message will prompt you do to do so.



SYNTHESYS.NET CALL BLENDING Blending Manager

All Teams: Number of Agents in Teams

| Blending Manager | r | | | | | | |
|--------------------|--|---|---|---|---|-------------------------------------|--------------------------------------|
| Help | | | | | | | |
| Help | Teams Agents Team Name BR Enquiry BR Order Global SNo Drop 1 SNo Drop 2 transfer team | s in All Teams 1/B Idle 2 2 2 2 0 | Last Mess I/B Busy 0 4 0 4 0 0 | age Action O/B Busy 0 3 0 3 0 0 0 | s Graph O/Bidle 6 0 6 0 6 0 0 | 0/B -> I/B 2 1 2 1 0 | Not Ready 0 2 1 2 1 0 |
| Blending is Active | | | | | | | |

Selected Team: Current Agent State

| All Teams | Teams Agents | in BR Order Last Message Actions Graph |
|---------------------------|----------------------------------|---|
| BR Enquiry | Name | State |
| Global SNoDrop 1 | Ana Andrew Automatic | I/B Busy I/B Busy I/B Busy |
| SNoDrop2 transfer team | Brigitte ChrisC ChrisS | I/B Busy I/B Waitingfor call I/B Weitingfor call |
| | ScottC SiegmundK | 0/8 > 1/8 0/8 > 1/8 |
| | CaseyM D-arroll ElizabethB | 0/8 in Call 0/8 in Call 0/8 in Call |
| | GrahamS | 0/B in Cali 0/B in Cali |
| | Gregory8 Jem | 0/8 In Call 0/8 Waiting for call 0/8 Waiting for call |
| | Keith | O/B Waiting for call |
| | BEN | Not Ready |



SYNTHESYS CALL BLENDING

Introduction

The Blending Manager is used to setup blending of Inbound and Outbound calls. For each team created, you decide if it should be *Inbound* or *Outbound* only, or a *Blended* team. If it is a blended team, containing both Inbound and Outbound campaigns, you need to specify the number of **Reserved Inbound Agents** that should remain free to take Inbound calls, and the number of **Maximum Inbound Agents** that can either be in, or are waiting for Inbound calls.

Depending on the selected number of Reserved Inbound Agents (0 or > 0) (your telephony platform may not support both or indeed any), you may be using either **Reactive Blending**, or **Active Blending**.

Reactive Blending: The Synthesys Blending module monitors each team of agents, ensuring that a pool of agents in each blended team is available for Inbound work (Inbound Only state). Contact centre administrators need to keep an eye on the inbound queues, as blended team settings may need to be adjusted, aiming to reserve either more or fewer agents to Inbound, depending on the Inbound traffic during certain periods of the day.

Active Blending: In Active Blending (please check with your Noetica project manager if your CTI platform supports this), Synthesys is notified by the telephony platform of the numbers of Inbound calls in the queue (if any). Only when calls are coming in will the system make the next free agent available for Inbound work. This way there is no need to reserve a fixed number of agents in each blended team for Inbound calls.



Blending is system wide and effects all Teams. When Call Blending has been configured, you can't switch the blending feature on and off yourself although you can configure teams to be Inbound Only or Outbound Only (in effect not blended). Please ask Noetica technical support for assistance.

Blending ignores the Global Team, and for blended teams it only takes account of ONE team membership for each agent, so the teams need to be set up accordingly, i.e. one agent can only ever be in one team in a blended environment.

A system wide setting can be enabled such that, if rescheduled calls are due, agents will be released for Outbound so that they can handle the rescheduled calls due.



Since Synthesys must monitor when an agent is ready to take an Inbound call, it is necessary that the telephony platform correctly keeps the system informed when an agent logs off, makes a manual call, goes 'busy' on their extension or otherwise changes state. Call blending can only work effectively to the extent these functions are provided by the telephony platform.



Opening the Blending Manager

To open the Synthesys Blending Manager

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

The left hand side of the Blending Manager shows a tree view listing all teams set up in the Synthesys Team Manager. On the right, you can see associated information when selecting the Teams, Agents in All Teams, Last Message, Actions and Graph tabs.

| Blending Manager | | | | | | | | 3 |
|-------------------------|------------|--|--|---|--|---------------|-----------|---|
| Help | | | | | | | | |
| All Teams | Teams Ag | ents in All Teams | Last Mess | age Action | ns Graph | | | |
| BR Enquiry | Team Nam | e I/Bldle | I/B Busy | O/B Busy | O/B Idle | 0/B -> I/B | Not Ready | |
| BR Order Global | BR Enquiry | 0 | 0 | 0 | 0 | 0 | 0 | |
| ···· SNoDrop1 | Global | 2 | ů. | ŏ | õ | ĩ | ĩ | |
| SNoDrop2 | SNoDrop1 | 2 | 4 | 3 | 6 | 2 | 2 | |
| ····· transfer team | SNoDrop2 | Blending Manag | er | | | | | |
| < Blending is Active | | Help All Teams BR Enquiry BR Order Global SNoDrop1 SNoDrop2 transfer team | Teams Ag Name Andew Automatic Brighte ChrisC ClairS ScottC ScottC ScottC ScottC CaseyM Darol Etizabetta GagM GrahamS GregovyB Jem Jo Keith BEN | ents in BR Order State 1/8 But 1/8 But 1/8 But 1/8 But 1/8 W4 0/8 b 0/8 b 0/ | Last Message sy sy sy sy sy sy sy sy sy sy sy sy sy | Actions Graph | 1 | |
| | | Blending is Active | <u>p</u> | | | | | |
| | | | | | | | | |

| Option | Shows |
|------------------------------------|---|
| Teams | All teams set up in the Synthesys Team Manager, with a count of the number of logged in agents in each different state per team, i.e. |
| Agent in All or a selected Team | Detailed current agent state for all teams or a selected team. |
| Last Message | Snapshot of the last blending decisions made. This is also logged in the Blender.Details.Log on the server. |
| Actions | Summary of the last blending action, such as moving agents to Inbound or Outbound. |
| Graph | Graph of the last hour's activity. If you move the mouse over the graph, a tool tip will give you a legend explaining the scale and the different lines. This information is also logged in the Phoenix_BlenderLog table. |



Blending Settings

With Blending enabled, All teams will initially go to Blended state by default. You need to adjust the settings in the Blending Team Properties page for each existing team, and for any new team that is subsequently created.

- Right click on the relevant team in the Tree on the left hand side of the *Blending* Manager dialog, and select Properties to open the Team Properties dialog.
- Select the **Inbound Only** option, if the selected team is to be used for Inbound • calling only, or **Outbound Only**, if the team is to be used for Outbound calling only.
- For blended teams, select Blended, and use the Reserved Inbound Agents selection box, to specify the number of agents that should remain available to take Inbound calls (from 1, up to the maximum number of agents exclusively represented in the selected team).
- Use the Maximum Inbound Agents selection box, to specify the maximum number of agents that should be able to work Inbound, from the Reserved Inbound Agents selected above, up to the maximum number of agents exclusively represented in the selected team. This number includes agents in I/B waiting and I/B busy states.

Blending Manager with tree view, listing all Teams

👰 В ending Manager Help **-**.. Teams Agents in All Teams Last Message Actions Graph **BR Enquiry** I/B Busy O/B Busy O/B Idle O/B -> I/B Not Ready Team Name I/B Idle BR Order **BR Enquiry** 0 0 0 02 0 Global BR Order 2 4 з 6 2 SNoDrop1 2 Ó ō ō Global SNoDrop2 2 3 Б SNoDrop1 4 2 2 transfer t Team Properties 23 0 0 BR Order Team Name: For Reserved Inbound Agents, 6 Agents in Team: specify how many agents should Call Direction remain available to take Inbound calls. Inbound Only Outbound Only Blended For Maximum Inbound Agents, specify the maximum number of Blendina Ш agents that should be allocated to Reserved Inbound Agents Inbound. Maximum Inbound Agents 2 * Cancel

Team Properties page for adjusting team settings



When using the up/ down arrows in the selection box for setting the Reserved Inbound Agents and Maximum Inbound Agents for a team, you can only select up to the maximum number of agents represented exclusively in the selected team.



Active Blending Settings

With Active Blending installed, Synthesys is notified of incoming calls. There is no need to reserve a fixed number of agents in each blended team for Inbound calls, as the system will free the next available agent for Inbound work, when calls are coming in. To adjust the default team settings (Reserved Inbound Agents = 0, Maximum Inbound Agents = N1) as required:

- Right click on the team in the Tree on the left hand side of the *Blending Manager* dialog, and select *Properties* to open the Team Properties dialog.
- Select the **Inbound Only** option, if the selected team is to be used for Inbound calling only, or **Outbound Only**, if the team is to be used for Outbound calling only.
- For blended teams, select **Blended**, and to invoke Active Blending, set the **Reserved Inbound Agents** selection box to zero **(0)**. To revert to reactive blending, use the *Reserved Inbound Agents* selection box to specify the number of agents that should be reserved to take Inbound calls, as described on the previous page: *Blending Settings*.
- Use the Maximum Inbound Agents selection box, to specify the maximum number of agents that should be able to work Inbound, from 1, up to the maximum number of agents exclusively represented in the selected team. This number includes agents in I/B waiting and I/B busy states.

Tree view, listing all Teams

Blending Team Properties



Ø

When using the up/ down arrows in the selection box for setting the Reserved Inbound Agents and Maximum Inbound Agents for a team, you can only select up to the maximum number of agents represented exclusively in the selected team.



Teams

The *Teams* option in the Blending Manager shows a summary of all teams, with the number of agents in different states.

| Blending Manager | r | | | | | | |
|--------------------|---------------|----------------|-----------|-------------|----------|------------|-----------|
| Help | | | | | | | |
| | Teams Agents | s in All Teams | Last Mess | age Actions | s Graph | | |
| BR Enquiry | Team Name | I/B Idle | I/B Busy | O/B Busy | O/B Idle | 0/B -> I/B | Not Ready |
| Global | BR Enquiry | 0 | 0 | 0 | 0 | 0 | 0 |
| SNoDrop1 | BR Order | 2 | 4 | 0 | 0 | 1 | 1 |
| SNoDrop2 | SNoDrop1 | 2 | 4 | 3 | 6 | 2 | 2 |
| transfer team | SNoDrop2 | 2 | 0 | 0 | 0 | 1 | 1 |
| | transfer team | 0 | • | v | • | | v l |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| I ← ► | | | | | | | |
| Blending is Active | | | | | | | 1 |

| Option | Shows |
|------------|--|
| Team Name | Names of the different teams set up in the Synthesys Team Manager. |
| I/B Idle | Number of agents free and waiting to take Inbound calls. |
| I/B Busy | Number of agents currently on an Inbound call. |
| O/B Busy | Number of agents currently on an Outbound call. |
| O/B Idle | Number of agents free and waiting to take Outbound calls. |
| O/B -> I/B | Outbound Transition: the number of agents about to be moved from Outbound to Inbound calls. |
| Not Ready | Number of agents currently not free to take calls. |
| | |



When agents log off Synthesys they are disregarded and dropped from the Blending Manager statistics.



Agents in All or Selected Teams

The **Agents in All (or selected) Teams** option lists the names of all agents for the team selected on the left (which can be all teams or just one team), and shows their current states.

| Blending Manage | er | | |
|---|--|--|----|
| Help | | | |
| All Teams BR Enquiry Global SNoDrop1 SNoDrop2 transfer team | Teams Agents in Name Ana Andrew Automatic Brigitte ChrisC ClairS ScottC SiegmundK CaseyM Darroll ElizabethB GagyM GrabamS GregoryB Jem Jo Keith BEN | BR Order Last Message Actions Graph State //8 //8 //8 1/8 Busy //8 //8 1/8 Busy //8 //8 1/8 Waiting for call //8 //8 0/8 > 1/8 //8 //8 0/8 > 1/8 //8 //8 0/8 In Call 0/8 In Call 0/8 In Call 0/8 Vaiting for call 0/8 Waiting for call 0/8 Waiting for call 0/8 Waiting for call 0/8 Waiting for call 0/8 Waiting for call Not Ready Not Ready | |
| Blending is Active | | | 1. |

| Option | Shows |
|--------|---|
| Name | User names of all agents for the team selected on the left (which can be all teams or just one team). |
| State | Current state of the agent. |



A system wide setting can be enabled such that, if rescheduled calls are due, agents will be released for Outbound so that they can handle the rescheduled calls due. When agents log off Synthesys they are disregarded and dropped from the Blending Manager statistics.



Last Message

The *Last Message* option shows a snapshot of the last call blending decisions made. This is also logged in the *Blender.Details.Log* on the server.

The information is useful for understanding why certain blending actions were carried out.

| 🔋 Blending Manager | |
|--|---|
| Help | |
| E-All Teams BR Enquiry BR Order Global SNoDrop1 SNoDrop2 transfer team | Teams Agents in BR Order Last Message Actions Graph Agents in BR Order Last Message Actions Graph Agent: ID: 1: Name: ADMIN: State: Available: Monitor State: Waiting: Can Work Outbound: Agent: ID: 1: Name: ADMIN: Added to O/B list fill_blender_state(), Team ID: 1: I/B Idle: 0, I/B Busy: 0 and O/B: 1 move_agents(). Team ID: 1: I/B Idle: 0, I/B Busy: 0 and O/B: 1 move_agents(). Team ID: 1, Max I/B: 4, Target Idle I/B: 0 move_agents(). Team ID: 1, Max I/B: 4, Target Idle I/B: 0 move_agents(). Team ID: 1, Total I/B: 0, Idle I/B: 0, Untouchables: 0 move_agents(). Team ID: 1, Total I/B: 0, Idle I/B: 0, Untouchables: 0 move_agents(). Team ID: 1, Skipping any move |
| | Agent: ID: 1: Name: ADMIN: State: Available: Monitor State: Waiting: Can Work Outbound: True: CTI Available: True: OB Change Requested: False Agent: ID: 1: Name: ADMIN: Added to O/B list fill_blender_state(), Team ID: 1: I/B Idle: 0, I/B Busy: 0 and O/B: 1 move_agents(), Team ID: 1, I/B Idle: 0, I/B Busy: 7 and 0/B: 1 move_agents(), Team ID: 1, Max I/B: 4, Target Idle I/B: 0 move_agents(), Team ID: 1, Total I/B: 0, Idle I/B: 0 move_agents(), Team ID: 1, Total I/B: 0, Untouchables: 0 |
| < □ III ► Blending is Active | Refresh |

Click the *Refresh* button, to display the latest message update.

Actions

The *Actions* option shows a summary of call blending actions taken, such as moving agents to Inbound or Outbound.

| 🔋 Blending Manage | er 🗆 🗖 | x |
|--|--|-----|
| Help | | |
| □-All Teams BR Enquiry BR Order Global SNoDrop1 SNoDrop2 transfer team | Teams Agents in BR Order Last Message Actions Graph No actions logged yet | * |
| ۰ | Refresh | |
| Blending is Active | | 11. |

Click the Refresh button, to display the latest call blending actions.



Graph

The Graph option displays a graph of the last hour's activity.

If you move the mouse over the graph, a tool tip will give you a legend explaining the scale and the different lines.

This information is also logged in the Phoenix_BlenderLog table.

| Blending Manage | r 🗆 🗖 📈 |
|--|--|
| Help | |
| - All Teams BR Enquiry BR Order Global SNoDrop1 SNoDrop2 transfer team | Teams Agents in BR Order Last Message Actions Graph Graph Legend : Red shows O/B agents Bilue shows I/B Idle agents Green shows I/B Busy agents Thick red is the number of O/B Licences Horizontal grid lines are 1 units apart The graph shows the last one hour of data |
| Blending is Active | li l |





NOETICA VOICE PLATFORM

Switch Manager Inbound Strategies

| 😭 Strategy Manager | | | |
|----------------------|-----------------------|--|--|
| File View Help | | | |
| 🛱 DDI Assignment | | Strategy 2 Agent Routing Acouting | Route End S Active Times 🔏 Call 🕅 Emergency Drill |
| & Inbound Strategies | Strategies Default | Strategy | |
| 8 IVR Strategies | KimTest Sample | Name: Default | |
| 脧 Strategy Editor | | Call Settings | |
| 2 Agent Assignment | | Priority Normal - N | finimum ring time: 4 🚖 Seconds |
| | | | |
| | | initial message: | ▼ |
| | | Waiting action: C Ringing O Play music | c |
| | | Music file: HoldMusic.wav | • |
| | | | |
| | | Call Queueing | CI Restriction |
| | | Send Busy if too many calls queueing | Only accept calls which present one of the given CLIs. |
| | | Martine and Institute | |
| | | Maximum queue lengur. | Add CLL Remove CLL |
| | | Send Busy if current wait too long | Had CEI Heinove CEI |
| | | Longest wait allowed: 0 | |
| | | | |
| | | | |
| | | | New Store Delete Innet Ernet |
| | | | wew Jave Deele import Export |
| Ready | | | |

IVR Strategies

| Strategy Manager | | | |
|--------------------|------------------------|--------------------|--|
| File View Help | | | |
| 😭 DDI Assignment | Graterias | 🗹 Strategy 📃 D | Digits O Active Times A Emergency Drill C Call Recording |
| Inbound Strategies | DefautiVR IVRSample | Strategy | Defee AB (D) |
| 8 IVR Strategies | | Tuno. | Delautivn |
| 🀉 Strategy Editor | | Call Settings | |
| Agent Assignment | | Minimum ring time: | 0 🛓 Seconds |
| | | Play message: | Default.wav 👻 |
| | | Usten for digits | Variable name: |
| | | | Timeout: 0 A Seconds, then: No action |
| | | | Number of digits: Any |
| | | | Stop after: # * |
| | | | Then/Otherwise: No action |
| | | | |
| | | | |
| | | | New Save Delete Import Export |
| Ready | | | i. |



NOETICA VOICE PLATFORM: SWITCH MANAGER

Introduction

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

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

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

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

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

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

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



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

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

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

The Noetica Voice Platform (NVP^{TM}) is not a standard feature but needs to be purchased separately.



DDI ASSIGNMENT

Using the **Switch Manager**, users can configure the Inbound and IVR strategies that are to be associated with each incoming DDI.

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

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

| DDI Assignmer Inbound S IVR Stra | nt – to asso Strategies - ategies - to tegy Editor | ciate DDI with Inbound strateg to configure the Inbound strate configure the IIVR strategies to – advanced strategies configu | y gy to be used be used red by Noetica |
|--|---|--|---|
| | | Re | efresh – to update strategy assignments |
| | | | |
| 😭 Strategy Manager | | | |
| File View Help | | | |
| 😂 DDI Assignment | | | |
| 8 Inbound Strategies | Assign strategies to E | DIs below: | |
| 9 D/D Chatteries | DDI | Strategy | Refresh |
| | 135790 | Trans 2 Queue | |
| 🇞 Strategy Editor 🛛 | 892050 | Irans Iostrat Mani Inbound | |
| Agent Assignment | 02036349954 | KimTesting | |
| | | | |
| | | | |
| | | | |
| | | | Edit Selected |
| | DDI Strategy | | Add |
| Ready | | | |
| _ | | | |
| 'Agent | Assignmer | nt – to link a DDI to an agent | |

Edit Selected – to modify the currently selected strategy Delete Selected - to remove the currently selected strategy

The next pages will describe how you can configure new Inbound and IVR strategies.

To assign a DDI to a selected agent, please go to the section **Agent Assignment** for more information.



INBOUND STRATEGIES

Strategy

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

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

| File View Help 20 Outdargement Strategie 8 Induct Strategies Strategie 3 Strategies Strategies 4 Strategies Strategies 4 Strategies Wating action: 4 Strategies Wating action: 4 Strategies Wating action: Cal Queuenting CLI Restriction Cal Queuenting Orly accept cals which present one of the given CLIs. Maximum queue length: Image: Clipped action Sords Bary 4 country wat too long Image: Clipped action Inoget wat allowed: Image: Clipped action Inoget wat allowed: Image: Clipped action Inoget wat allowed: Image: Clipped action Inoget wat allo | 😭 Strategy Manager | a could see the | 277 D | | |
|---|----------------------|-----------------------|--------------------------------|------------------------|---|
| 2 001 Assgement | File View Help | | | | |
| Index Strategies Strategies Nen: Call Settings Nonal None: Orbut Call Settings Nonal None: Orbut Valing action: Proging @ Paymaic Music file: HoldMusic way Call Counsing Cull Restration Call Counsing Cull Restration Send Bary foo many cells queueing Only accept calls which present one of the given Culls. Maximum queue tength: Image: Ingest wit allowed: Image: | 💢 DDI Assignment | | Strategy 🔒 A | gent Routing A Routing | 😤 Route End 🕓 Active Times 🏾 🍰 Call 🛛 🧥 Emergency Drill |
| IN Strategies Imited | & Inbound Strategies | Strategies Default | Strategy | | |
| Image: Strategy Editor Agent Assignment Priorly Nemail Wating action: Ringing Raging Playmaic Wating action: Ringing Call Ausoring Cull Restriction Call Ausoring Cull Restriction Call Ausoring Only accept calls which presert one of the given CLIs. Maximum queue length: Image: Add Cull Remove Cull Longest wat slowed: Image: Add Cull Remove Cull Image: Save Image: Save New: Deteint | 8 IVR Strategies | Kim Test Sample | Name: | Default | |
| Agent Assignment Assignment Proty Nema Memuning time: Assignment Proty Nema Memuning time: Proty Nema Memuning time: Proty Nema Memuning time: Proty Nema Proty Nema Memuning time: Proty Proty Nema Memuning time: Proty Proty Proty Proty Proty Pr | 🏂 Strategy Editor | | Call Settings | | |
| Partition Image: Image | Agent Assignment | | Priority | Normal • Min | imum ring time: 4 A Seconds |
| Wating scton: Fanging @ Flay music Music file: HiddMusic wav Call Queueing Cull Restriction Send Bury f iso mary calls queueing Only accept calls which present one of the given CLIs. Maximum queue length: Ingest wat allowed: Ingest w | | | Initial message: | | |
| Watery actor: Marging W Haymand: Music file: MedMusic New Cal Queueng CLI Restriction Cal Queueng Only accept calls which present one of the given CLIs. Maximum queue length: Image: Clipted action of the given CLIs. Send Bury f comment wat too long Image: Clipted action of the given CLIs. Image: Wat allowed: Image: Clipted action of the given CLIs. New: Serve: Detect New: Serve: Detect Restriction Image: Serve: Detect | | | | Destas R | |
| | | | Waiting action: Music file: | Hold Music way | |
| Cal Queueng CLI Restriction Image: Send Bury floo mary calls queueling Only accept calls which present one of the given CLIs. Maximum queue length: Image: Imag | | | Mode inc. | Holdmusic.wav | • |
| Cal Quoueing C.U. Restriction Send Bury f too many cells queueing Only accept cells which present one of the given CLIs. Maximum queue length: 0 Send Bury f coment wait too long Add CLI Remove CLI Longest wait allowed: 0 New Sorie Detects New Sorie Depot | | | | | |
| Image: Send Bury f too many cells supresing Only accept calls which presert one of the given CLIs. Mastimum queue length: Image: Only accept calls which presert one of the given CLIs. Image: Send Bury f current wat too long Image: Add CLI Remove CLI Longest wat allowed: Image: Only accept calls which presert one of the given CLIs. Image: Device Image: Only accept calls which presert one of the given CLIs. Image: Only accept calls which presert one of the given CLIs. Image: Only accept calls which presert one of the given CLIs. Image: Only accept calls which presert one of the given CLIs. Image: Only accept calls which presert one of the given CLIs. Image: Only accept calls which presert one of the given CLIs. Image: Only accept calls which presert one of the given CLIs. Image: Only accept calls which presert one of the given CLIs. Image: Only accept calls which presert one of the given CLIs. Image: Only accept calls which presert one of the given CLIs. Image: Only accept calls which presert one of the given CLIs. Image: Only accept calls which presert one of the given CLIs. Image: Only accept calls which presert one of the given CLIs. Image: Only accept calls which presert one of the given CLIS. Image: Only accept calls which presert one of the given CLIS. Image: Only accept calls which presert one | | | Call Queueing | | CLI Restriction |
| Pandet | | | Send Busy if too mar | ny calls queueing | Only accept calls which present one of the given CLIs. |
| Add CLI Remove CLI Lorgest wat allowed: | | | Maximum queue length: | 0 | |
| Pardet | | | Send Busy if current | wait too long | Add CLI Remove CLI |
| Parde | | | Longest wait allowed: | 0 | |
| Parde | | | | | |
| Parde Save Delide Impot Epot | | | | | |
| Pash | | L | | | New Save Delete Imont Exact |
| | Ready | | | | |

Configuring details for the Call Queuing process

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

CLI Restriction

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



Agent Routing

Direct Agent DDIs

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

| 😭 Strategy Manager | |
|---|---|
| File View Help | |
| DDI Assignment Strategies Inbound Strategies Orden A Ive Strategies Strategies Strategy Editor Sample | Strategy Apert Routing Routin |
| | PAM - Personal Account Manager Use PAM CRM Pedic: PAM aloves you to preferentially route incoming calls to the agent or team of agents who have a relationship with the customer already. PAM works like this: (1) Based on the incoming caller's number, PAM searches for the matching CRM mood jusing the CRM pedic specified) (2) If there is a TEAMS field containing a comma separated list of Agent is solvable. Then they will get the call. (3) If there is a TEAMS field containing a comma separated list of Agent is solvable. Then they will get the call. (4) Otherwise ending or CRM searches are model. You can populate AGENTS and TEAMS fields yoursel by using scipting or CRM imports. |
| Ready | |

PAM - Personal Account Manager

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

In the Inbound Strategies page, under the Agent Routing tab

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



Routing

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

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

| 2 DDI Assignment Strategies | 📝 Strategy 💈 Agent Routing 🔷 Ro | louting 🛛 👻 Route End 🔹 Active Times 🛛 🍰 Call 🛛 🛕 Emergency Drill |
|--|---------------------------------|---|
| Inbound Strategies Brighte Switch Test | Primary Teams | |
| DEFault Ken Text 2 | Primary Teams | Available Teams |
| KinTestig | BR Jan PD test | < _MattPDTest2015 |
| Strategy Editor Marcos Strategy 3 | | |
| Accept Accignment Sample | | PDTest |
| Agent Assignment | | Time before including further teams |
| | | ladefinite @ 10 11 Current |
| | | Seconds |
| | Secondary Teams | |
| | Use Secondary Teams | Available Teams |
| | As test team | MattPDTest2015 |
| | | MattTest |
| | | PDTest |
| | | |
| | Message helo1.wav | Time before including additional teams |
| | | 💿 Indefinite 🔍 15 🚔 Seconds |
| | A.100 17 | |
| | Additional Teams | |
| | Additional learns | Available Leams |
| | bh bigstei | Matt Test |
| | | MattTest2 |
| | | |
| | Message | |
| and a state of the second state and a state of the second state of the | | |

A Message (WAV file) can be played while the caller is waiting in the queue.



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

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

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



Route End

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

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

| 🛱 Strategy Manager - SynthesysSwitch | |
|---|--|
| File View Help | |
| DDI Assignment Strategies Inbound Strategies Brytte Switch/Test IvR. Strategies Hon Test 2 Strategy Editor MarcoStrategy3 Agent Assignment Sample | Image: Strategy 2 Agent Routing Routing Route End Active Times Emergency Drill When to abandon inbound calls Time before abandoning quoue Indefinite Image: Additional calls |
| | Action when abandoning calls Play message and then Drop Call Edemal divert to: |
| Dende | New Save Delete Import Export |



Active Times

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

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

| 🛱 Strategy Manager - Synthes | ysSwitch | |
|------------------------------|-----------------------------|---|
| File View Help | | |
| 🗯 DDI Assignment | Oralization | 📝 Strategy 💈 Agent Routing 🔗 Routing 🖤 Route End 💿 Active Times 🏼 🏂 Call 🛛 🛕 Emergency Drill |
| Inbound Strategies | Brigtte Switch Test | Active Times |
| 8 IVR Strategies | Kim Test2 | Hom IO Llosed |
| 🏂 Strategy Editor | MarcosStrategy3 MattTest | Saturday: 12:00 AM (+ 11:59 PM (+) |
| 2 Agent Assignment | Sample | Sunday: 12:00 AM 🔄 11:59 PM 🔄 |
| | | Action when abandoning calls Play message Please TryAgain.wavand then Drop Cal Estemal divert to: New Save Delete Import Esport |
| Ready | | |
| | | |



Call

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

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

| 🛱 Strategy Manager - Synth | nesysSwitch | |
|----------------------------|-----------------------------|--|
| File View Help | | |
| 🛱 DDI Assignment | | 🕼 Strategy 🔮 Agent Routing 🗇 Routing 🖤 Route End 💿 Active Times 🎉 Call 🛕 Emergency Drill |
| Inbound Strategies | Brigitte SwitchTest | Answering |
| 8 IVR Strategies | KmTesting | Number of Rings: 1 🔆 |
| 🀉 Strategy Editor | MarcosStrategy3 MattTest | |
| 2 Agent Assignment | Sample | Anart wara un time: 5 4 Cananda |
| | | Age is map up une. |
| | | Music on Hold |
| | | Music on hold: CypressGoats.wav |
| | | Recording |
| | | |
| | | ☑ Agent ☑ Qustomer |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | New Save Delete Import Export |
| Ready | | |

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

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

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

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



Emergency Drill

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

Specifying the Action to be taken in an Emergency

| Strategy Manager - SynthesysSwitch | |
|--|--|
| File View Help | |
| 😂 DDI Assignment | 📝 Strategy 📓 Digits 🕓 Active Times 🛕 Emergency Drill |
| Inbound Strategies BRCustomer | Action to take while in Emergency Drill mode |
| IVR Strategies IVR Strategies UrinsLross Default/VR UrinsLross | |
| Strategy Editor | Busy back incoming calls |
| | Redirect calls to |
| | Play message |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | New Save Delete Import Export |
| Ready | |

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



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



Putting the Switch into Emergency Mode

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

| Ella Edit View Enverter Teals Hele | 💭 👻 C 🧔 Voice Platform Control Panel X | ម្លាស់ |
|--|--|--------|
| Voice Platform Control Panel | | |
| Voice Platforms | | |
| Last updated < 1 minute ago. Refresh? | | |
| SynthesysSwitch Running | | |
| Shuldown Emergency Mode Cancel Emergency | | |

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

Action on Returning to building

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

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



IVR STRATEGIES

Strategy

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

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

| Strategy Manager - SynthesysSwitch | |
|--|------|
| ile View Help | |
| Strategy Strategy | |
| binbound Strategies Default/R Strategy | |
| § IVR Strategies | |
| Strategy Editor Cal Settings | |
| Agent Assignment Minimum ring time: 4 👘 Seconds | |
| Play message: Default wav | |
| ☑ Listen for digits Variable name: Variable | |
| Timeout: 0 🔄 Seconds.then: No action 🗸 | |
| Number of digts: Any 💌 | |
| Stop after: | |
| Then/Otherwise: No action | |
| | |
| | |
| | |
| New Save Delete Import Ex | port |
| ady | |

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

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

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



Digits

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

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

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

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

| 😭 Strategy Manager - SynthesysSwitch | | | | |
|--------------------------------------|-----------------|---------------------|--|---------------|
| File View Help | | | | |
| 😂 DDI Assignment | Strategy | Digits S Active Tir | mes 🔥 Emergency Drill 🔏 Call Recording | |
| Inbound Strategies DefaultIVR | DTMF Allocation | | | |
| IVR Strategies | | | | |
| 🏂 Strategy Editor | DTMF Digit | Branch to | <u>^</u> | |
| Agent Assignment | 1 | No action | | |
| S Agent Assignment | 3 | | | |
| | 4 | | E | |
| | 6 | | | |
| | 7 | | | |
| | 9 | | | |
| | 0 | | - | |
| | • | m | Þ | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | New Save Delete | Import Export |
| Ready | | | | |

Action

Used to

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



Active Times

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

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

| 🖀 Strategy Manager - SynthesysSwitch | | × |
|--------------------------------------|--|-----|
| File View Help | | |
| C DDI Assignment | 🕼 Strategy 🔠 Digits 🕐 Active Times 🔥 Emergency Drill | |
| Inbound Strategies DefaultIVR | Active Times | |
| 8 IVR Strategies | From To Closed | |
| Strategy Editor | Weekdays: 12:00 AM 🔄 11:59 PM 😓 | |
| Arent Assignment | Saturday: 09:00 AM 🔄 05:00 PM 🚖 | |
| Agent Assignment | Sunday: 09:00 AM 🔄 11:00 PM 🚖 | |
| | | |
| | Our or nours message. Dusinessnours wav | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | New Save Delete Import Exp | ort |



Emergency Drill

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

Specifying the Action to be taken in an Emergency

| 😋 Strategy Manager - Synth | nesysSwitch | | |
|--|-------------|---|--------|
| File View Help | | | |
| 🗯 DDI Assignment | Sherbarian | 😰 Strategy 🚆 Digits 🕐 Active Times 🔥 🛕 Emergency Drill 🛛 🖨 Call Recording | |
| Inbound Strategies | DefaultIVR | Action to take while in Emergency Drill mode | |
| 8 IVR Strategies | INNSample | | |
| Strategy Editor Agent Assignment | | Busy back incoming calls | |
| | | Redirect calls to | |
| | | Play message | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | New Save Delete Import | Export |
| Ready | | | |

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



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



Putting the Switch into Emergency Mode

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

| (C) () Attp://newblue/VPControlProgram | クー C 🧭 Voice Platform Control Panel × | <u>බි කි බි</u> |
|--|---------------------------------------|-----------------|
| File Edit View Favorites Tools Help | | |
| Voice Platform Control Panel | | |
| | | |
| Voice Platforms | | |
| Last updated < 1 minute ago. Refresh? | | |
| SynthesysSwitch Running | | |
| Shuldown Emergency Mode Cance | el Emergency | |

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

Action on Returning to building

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

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



Call Recording

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

| 😭 Strategy Manager - Synth | thesysSwitch | • × |
|----------------------------|--|--------|
| File View Help | | |
| 🛱 DDI Assignment | 🕼 Strategy 🚆 Digits 🕐 Active Times 🔥 Emergency Drill | |
| 8 Inbound Strategies | Strategies Recording | |
| 8 IVR Strategies | IVRSample IV All | |
| 🇞 Strategy Editor | Agent Cietomar | |
| Agent Assignment | CORVIN | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | New Save Delete Imoot E | Export |
| Parata | | |
| neauy | | .:: |

Recording Options

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

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

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

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



THE STRATEGY EDITOR

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

| 🖀 Strategy Manager | | and the second second | | | | |
|--------------------|------------|---|---|-------------------------------------|------------------------------|----------------|
| File View Help | | | | | | |
| 🗯 DDI Assignment | A + | Strategy | | | | |
| Inbound Strategies | DefaultC1 | Strategy | | | | |
| 8 IVR Strategies | | Name: | DefaultC1 | | Refresh | |
| 🀉 Strategy Editor | | xml version="1.0" encoding</th <th>="utf-16"?></th> <th></th> <th></th> <th></th> | ="utf-16"?> | | | |
| 2 Agent Assignment | | StrategyDTO xmlns i= "http:// <ld>0000000-0000-0000-0000-0 <name>DefaultC1</name></ld> | /www.w3.org/2001/XMLSchema-inst 000-000000000002 | ance" xmins="http://schemas.datacor | ntract.org/2004/07/Synthesys |).Switch.ACD"> |
| | | cDirectDDIPast Through 14 ChreatDDIPast Through 14 Chreaten 20 Mark 20 Company Chreaten 20 Company 20 Company Characon Labor 20 Company C | ee (/DirectDDIPEasThrough) (foregencyBuyBack) ency wae (/EmegencyWavFile) ad/Fings> (Adgent) 2a) 2a) 2a) 2a) 2a) 2a) 2a) 2a) 2a) 2a | New Save De | ete Impot | Epot |
| Ready | | | | | | |
| neouy | | | | | | .:: |



AGENT ASSIGNMENT

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

| 😭 Strategy Manager - Synthesys | Switch | | | | - | |
|--------------------------------|----------------------|----------------|---|-------------------|--------------|------------|
| File View Help | | | | | | |
| 😭 DDI Assignment | | | | | | |
| 😹 Inbound Strategies | Assign DDIs to agent | s below: | | Acost DDI accion | ment | |
| R IVR Strategies | Agent Name | DDI Assignment | | Agent DDI assigni | nent | |
| B Strategy Editor | BrigitteR | 12345 | 5 | Selected Agent: | BrigitteR | |
| | | | | Add DDI: | | Add DDI |
| Agent Assignment | | | | DDIs: | 12345 | Remove DDI |
| | - | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | Delete Selected | | |
| | | | | | | |
| | Agent | | • | Add | Undo Changes | Save |
| | | | | | | |
| L | | | | | |] |
| Ready | | | | | | |



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

Assigning a DDI to a selected Agent

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



NOETICA VOICE PLATFORM & OUTBOUND CALLING

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

Noetica Voice Platform Outbound List Properties

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