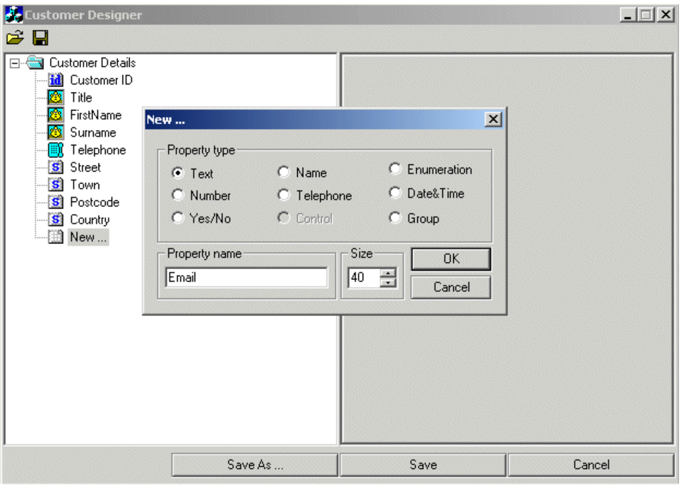
# SYNTHESYS MANAGEMENT APPLICATIONS

# Outbound Wizard

***Creating a new CRM***




***Adding an Outbound List & selecting a Team***

# SYNTHESYS OUTBOUND WIZARD

## Introduction

The Outbound Setup Wizard is used to:

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

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


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

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

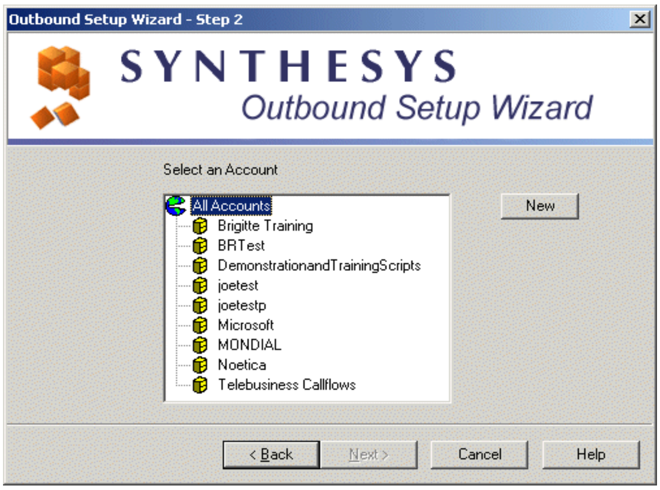
*The* Call lists *of customers to be phoned are created and managed in the* Outbound *module of the Synthesys Dialler Platform.*

## Creating or Selecting Accounts

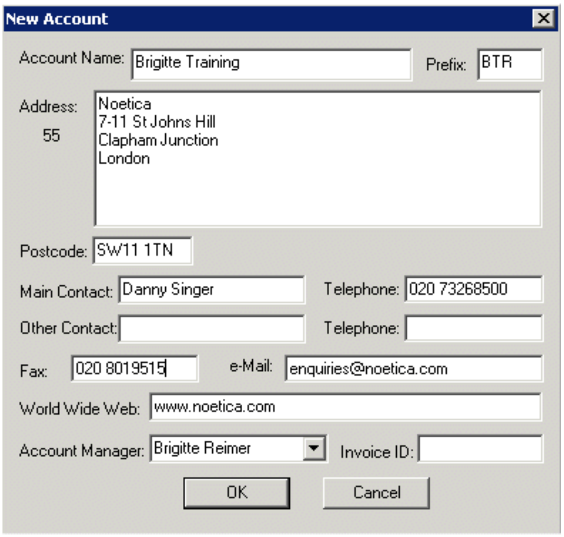
To create or access an account:

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

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




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




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

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

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

## Adding or Selecting CRM Campaigns

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

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

*Entering details for a new CRM campaign*

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


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

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

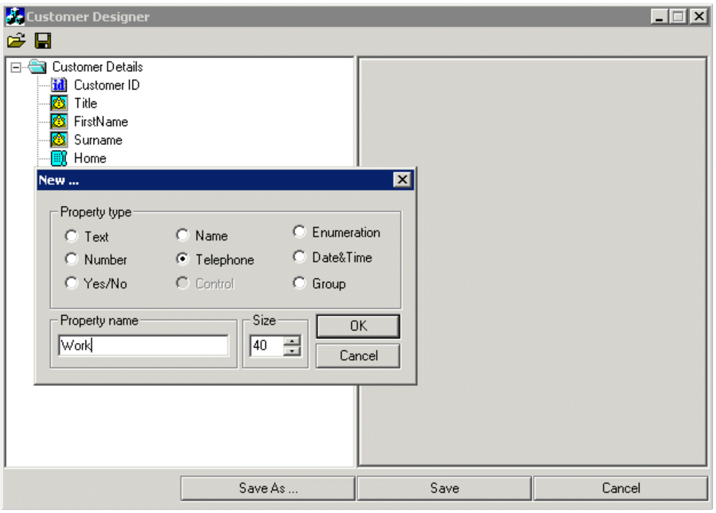
Click OK to open the Customer Designer, where you add the required CRM fields.

# Adding and Modifying CRM Fields

*Adding new CRM Fields*

To add new fields to your CRM table:

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




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

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

*Modifying existing CRM Fields*

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

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

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

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

## Adding or Selecting Outbound Lists

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

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

*Entering details for a new Outbound List*

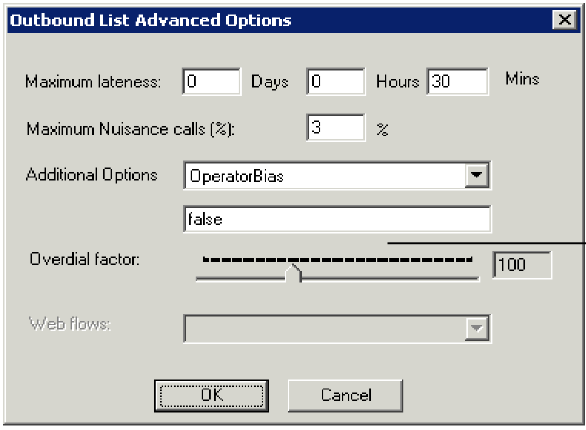
- Add the name for the new Outbound list into the ***Name*** field.
- To set up a predictive Outbound list, tick the ***Predictive*** check box.
- If you wish to assign the Outbound list to a team, select the relevant team.


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

# Setting Advanced Options for Outbound Lists

In the Outbound List Properties dialog:

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




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

| Available Options | Use |
|---|---|
| Operator Bias | True or False. If true, rescheduled calls due will only be presented to the agent that scheduled the call, if false, rescheduled calls will go to any agent. |
| Dial Prefix | An appropriate dial prefix can be entered. |
| MinCallsBeforePredictive | To enter the minimum number of calls to be dialled for this campaign, before predictive dialling starts. |
| Dial Preference | Enter *Sleeping, Queued*, or *Both* to determine, if sleeping calls due are to be dialled before queued calls or vice-versa, or if a mixture of both should be dialled and presented to the agents in order of their QueueID. |
| Dial Order | To instruct the dialler in which order to retrieve queued items. Enter ReverseID if new Queue items should be presented to agents before old Queue items. Enter ID, to present older queued items before the newly queued calls. |

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

## Additional Advanced Outbound List Options

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

| Available Options | Use |
|---|---|
| **MinCallsBeforePredictive** | Enter the minimum number of calls to be dialled for this campaign, before predictive dialling starts, max is 99. |
| **Operator Bias** | **True or False**. If true, rescheduled calls due will only be presented to the agent that scheduled the call, if false, rescheduled calls will go to any agent. |
| **Priority Order** | Enter ***None, Asc*** **or** ***Desc*** to specify the order in which to present priority calls. Entering ***Desc will present calls with higher priority settings first. Deactivate and re-activate*** the OB list to refresh the internal PD dialling list. |
| **Rescheduled Flags** | Enter ***C.L.A*** and/ or.**P** to determine how the **Reschedule dialog** is presented to agents when aborting p*review* or p*redictive* outbound calls. |
| **Use do not call list** | **True/ False**. If True, allows Synthesys to check the telephone numbers in the **PHOENIX_DoNotCallList** table and to remove associated records from the Outbound call list. |

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

For more information about Rescheduled Flags, please see the module ‘Outbound Manager Basics’.