

# SYNTHESYS MANAGEMENT TEAMS

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## INTRODUCTION

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

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

#### **Users and User Roles**

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

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



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

#### Work Assignment

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

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



## STARTING SYNTHESYS TEAMS

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

• Click the Teams tab at the top of the Synthesys Management screen.

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



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

Agent - Primary teamAgent - Secondary teamsInbound webflowOutbound listOutbound groupTeams

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



#### **Setting up New Teams**

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

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

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



In the **New Team** dialog:

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

Team name:	City Break	
Team Description:	Contains City Break Webflows	& OB Lists
Manager:	ade jones	*
	Happy Administrator	
	alan smithy	
	Amina Group	
	Arthur Teacake	
	bert ernie	
	Brigitte Reimer	•



#### **Copying Users to a Team**

To copy specific users/ agents to a team:

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

							Welcome brigitte	logou
eams	🚨 Team Ma	nager: This 1	feam has not be	en assigned a	Manager.			•
🔺 🍰 Global		2		3	3	3		
🍰 Avance	ana	brigitte	Zara	Brigitte -	Brigitte -	Zara		
<u> </u> Blend	New Team		BookingOB	TRN Script1	TRN Script2	Bookings -		
🍰 blend_02	Broadcast Teams Ch	anges				Booking Line		
🥵 BookingLir								
🍰 BrigitteIna	Cut							
🥵 British Gas	Сору							
💰 BRTest1	Paste							
S ClearlyBus	Add New User							
🖌 🥵 Demonstra	Add Users							
S Elliot Te	Add Webflows							
Sepalish	Add Outbound Lists							
German	Add Workflows							
EL Outhou	Add Entity Presenta	tions						
⊿ 🥵 Gigaset	Set Team Manager.							

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

Add Users	
Please select which Users you would like to add to the Team.	
Administrator (Admin)	
Andrew Middleton (AndrewM)	
Automatic (automatic)	
Bev Smith (Bev)	
Brigitte Reimer (BrigitteR)	
c c (c)	
Christoph Brandt (cbrandt)	
Christof Grunden (cgrunden)	
Christian Schoppen (cschoppen)	v
OK Cance	el

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

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



Users that have been copied will remain in their original team(s), as well as being part of the new team, unless they are removed from these teams.

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



#### **Primary Teams**

The user displayed in his/her primary team.

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



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

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

Warnin	g
	Warning - You are about to move your User into a team lower in the Team hierarchy. If you choose to continue with this action you will no longer be able to Edit any teams higher in the hierarchy than the new Team.
	Ok Cancel

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



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

Primary Team	
You are removing this User a new Primary Team.	r from it's Primary Team. Please select
(	



#### **Copying Webflows and Outbound lists to a Team**

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

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

🥵 Global	2	8		3	3	3	
Avance	ana	brigitte	Zara	Brigitte -	Brigitte -	Zara	
S Blend	New Team		BookingOB	TRN Script1	TRN Script2	Bookings - Booking Line	
Beaking Lin	Broadcast Teams	Changes					
BrigitteIna British Gas BRTect1	Cut Copy Paste						
<ul> <li>British</li> <li>ClearlyBus</li> <li>Demonstra</li> <li>Elliot Te</li> <li>English</li> <li>German</li> </ul>	Add New User Add Users Add Webflows Add Outbound List Add Workflows Add Entity Present	s					

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

Nesse colort which Wohflows you would like to ad	d to the Team
rease select which webhows you would like to ad	io to the ream.
Jaros - print	*
Brigitte - ProcuctOrderLine	
GIGASET - ProdTest	
Matt - ProductTest	
GIGASET - PrototypeReturnRecordingProduct	
Jaros - referenceNumber	=
Jaros - refNoProperties	
Matt - RefNoTest	
Matt - RegExTest	•

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



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

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



#### Using Cut & Paste to move Users & Work Object

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

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



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

eams			🏅 Team I	Manager: This	Feam has not be	en assigned a	Manager.
🔉 BK UBLISTS 8	& wedflows		<b>*</b>			<b></b>	
🔺 誘 BR PersGrou	ıpCallback		<b></b>	<u> </u>	3	3	3
🝰 ana2 test	team		bart	Ana4 OB	PR WrongNr	BR DecJan -	BR SeptOct
🍰 BR Reschedi	uleFlagTest					BR City Break	BR Main Webflow
🝰 BR WF Laun	ch					DICOK	WEDHOW
<u> Brigitte</u>	New Team.						
<u> 8</u> Brigitte E	Broadcast 1	Teams C	hanges				
🖌 💰 BrigitteIn	Cut						
📸 Matt A	Сору						



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

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



#### **Removing Agents and Work Objects**

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

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



When removing a user from his/her primary team:

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

Primary Team	
You are removing this Us a new Primary Team.	er from it's Primary Team. Please select
	•
3rd Parties	
BR Test	OK Cancel
Call Team 1	
Call Team 2	
ClearlyBusiness	
Gigaset	
Global	
Lucy Team	



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



#### **Broadcast Teams Changes**

Historically, changes made to teams required an agent to logoff and logon again, to pick up the changes. Customers now have the option to use the system as before, i.e. setting up new teams assignments in advance of a new shift, which will take effect when agents log back in after a break, or to use the **Broadcast Teams Changes** option to broadcast the updates instantly, so that agents can pick up any changes directly, without having to log off and back on again.

To use the Broadcast Teams Changes option

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

		Welcome brigitte   logout
Teams	Team Manager: This Team has not been assigned a Manager.	Show Inactive Users
Global		
🝰 a	ana BR OB1 test PG Callback BR June - OB	
<u> 5</u> b	Group2	=
🝰 A RescheduleFlag	Test	
🝰 A Test		
<u> </u> OB Lists		
💰 AmieTest		
🝰 Ana	New Team	
🝰 Ana Permission	Broadcast Teams Changes	
🝰 Avance	Cut	
🝰 Betty	Сору	
<u> B</u> etty Sub	Paste	
<u> B</u> lend	Add New User	
s blend_02	Add Users	
<u> BookingLine</u>	Add Webflows	
<u> B</u> R DynamicTea	Add Outbound Lists	
🝰 BR Entities	Add Workflows	
🤧 BR OBGroup	Add Entity Presentations	
🝰 Ana1 SubTea	Set Team Manager	
🝰 BR OBLists 8	Idla Timaout	
<u> BR</u> OBGroup Te		
🝰 BR PersGroupC	Delete Team	
パ BR Reschedulei	Kename	•
	Refresh	

×
$\mathbf{V}$

*Idle Timeout* is used to automatically pop records from preview Outbound lists to your agent's workstation, rather than agents having to click Get Next Record at run time.

To improve functionality, we have removed the option from Teams, and instead you set up **Idle Timeout** in the **Advanced** Options page of your Outbound lists, adding, in seconds, the frequency for the next screen pop.

For more information please see the chapter Advanced Options for Outbound Lists, either in the Synthesys manual **CRM and Outbound**, or in the Synthesys Core module **Synthesys Outbound Manager Basics**.



## TEAM SET-UP USING OUTBOUND GROUPS

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

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

#### Main team

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

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

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



#### Sub Team

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

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



### **DDI MAINTENANCE**

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

#### Assigning DDI to an Inbound Webflow

To assign a DDI number to an Inbound webflow

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

Webflow [Brigitte - Insurance Claim] Properties				
Outbound Lists DDI				
Assig	ned DDIs:	Add DDI		
	22	RemoveDDI		
	Enter DDI:			
	OK Cancel			
		DK Cancel		

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

To remove an existing DDI number from the selected webflow

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



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

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

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



#### Assigning Outbound Lists to a Webflow

To assign an Outbound list to a webflow

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

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

Synthesys Management - operationsnet.noetica.com	
	Nootica Synthesys Management
Teams User Management Call List Applications	
Dere Management Call Dir   Teams   Status   Status <	Welcome bright     Show Inactive Users     Show Inactive Users     Image: Show Inactive Users

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



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

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

Ø



#### Assigning a Webflow to an Outbound List

To assign a webflow to an Outbound list

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



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

Outbound List [Zara BookingOB] Properties				
Webflow				
Assigned Webflow:	Zara Bookings - Booking Line			
Please select a Webflo	w to assign to this Outbound List:			
<none></none>				
Brigitte - TRN Script1				
Brigitte - TRN Script2				
Zara Bookings - Booking Line				
	OK Cancel			

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



## NOTES