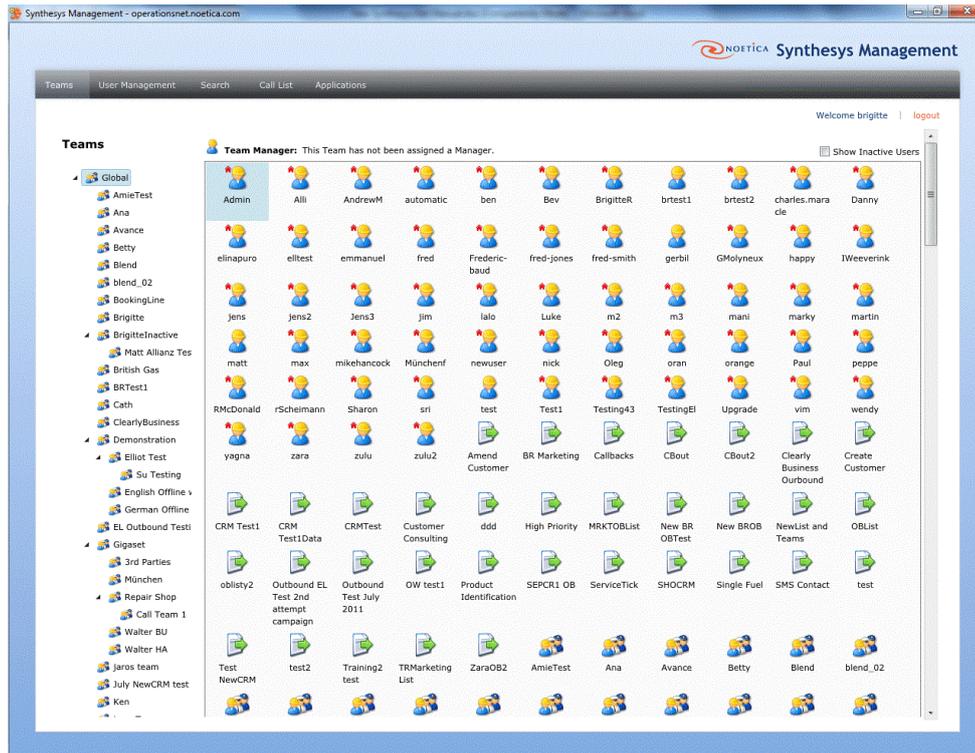


SYNTHESYS MANAGEMENT TEAMS



SYNTHESYS .NET TEAMS

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|--|----|
| INTRODUCTION..... | 3 |
| Users and User Roles | 3 |
| Work Assignment..... | 3 |
| STARTING SYNTHESYS TEAMS | 4 |
| Setting up New Teams..... | 5 |
| Copying Users to a Team | 6 |
| Primary Teams..... | 7 |
| Copying Webflows and Outbound lists to a Team | 8 |
| Using Cut & Paste to move Users & Work Objects | 8 |
| Removing Agents and Work Objects..... | 10 |
| Broadcast Teams Changes..... | 11 |
| TEAM SET-UP USING OUTBOUND GROUPS | 12 |
| Main team..... | 12 |
| Sub Team | 12 |
| DDI MAINTENANCE | 13 |
| Assigning DDI to an Inbound Webflow | 13 |
| Assigning Outbound Lists to a Webflow | 14 |
| Assigning a Webflow to an Outbound List..... | 15 |

INTRODUCTION

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

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

Users and User Roles

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

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



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

Work Assignment

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

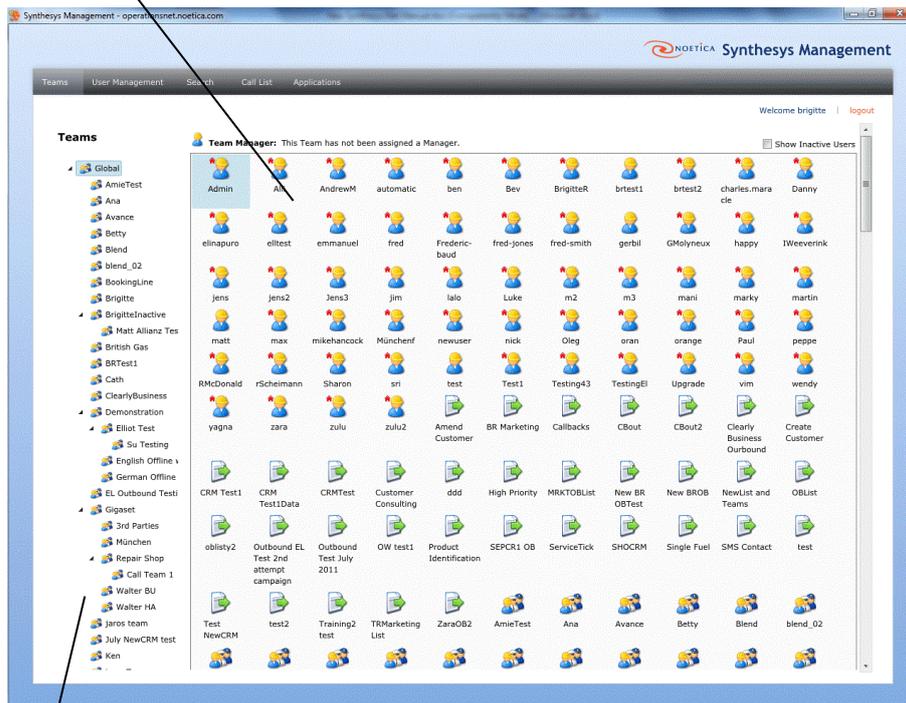
- If a Webflow is in an agent's team, then the agent has permission to work that Webflow.
- If a cases inbox is in an agent's team, then the agent will be assigned cases from that inbox.

STARTING SYNTHESYS TEAMS

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

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

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



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

-  Agent - Primary team
-  Agent – Secondary teams
-  Inbound webflow
-  Outbound list
-  Outbound group
-  Teams

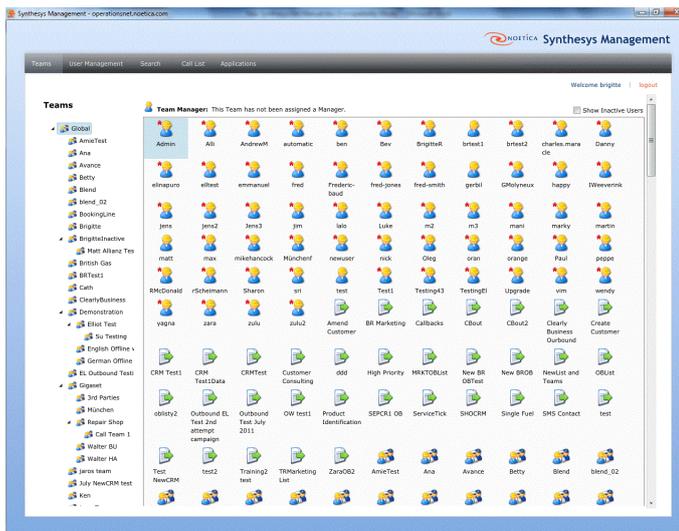
The following section will give information about setting up **New Teams** and show how agents and campaigns can be added and removed.

Setting up New Teams

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

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

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



In the **New Team** dialog:

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

New Team

Please enter the name of the new team and select a manager:

Team name:

Team Description:

Manager:

ade jones

Happy Administrator

alan smithy

Amina Group

Arthur Teacake

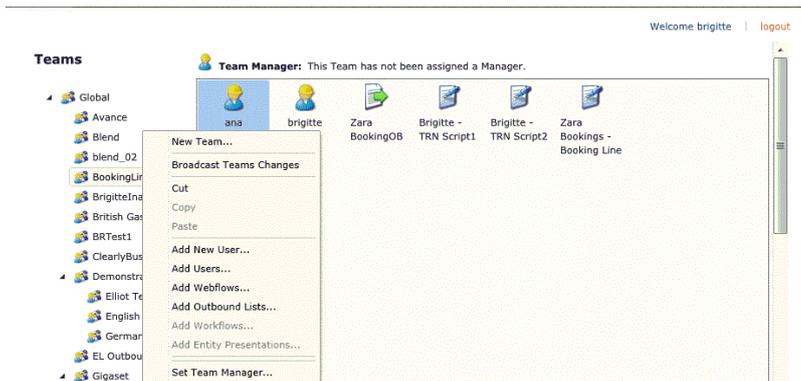
bert ernie

Brigitte Reimer

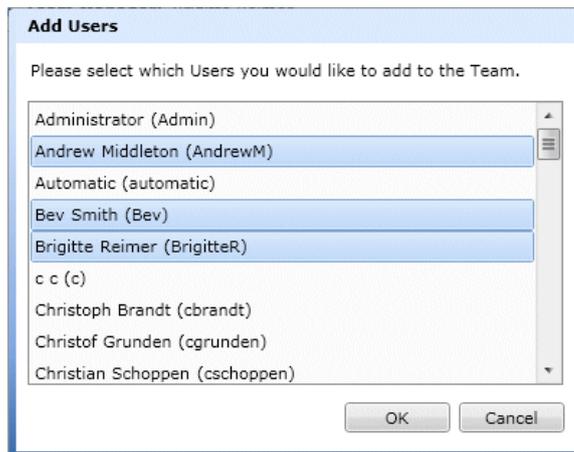
Copying Users to a Team

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.



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



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

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



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

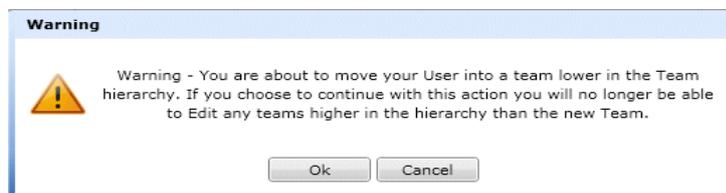
The user  icon shows that a user or agent is displayed in his/her primary team.

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.

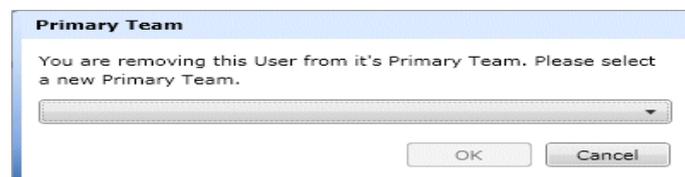
A message to this effect will be displayed when users that are currently logged in move themselves into a lower team.



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



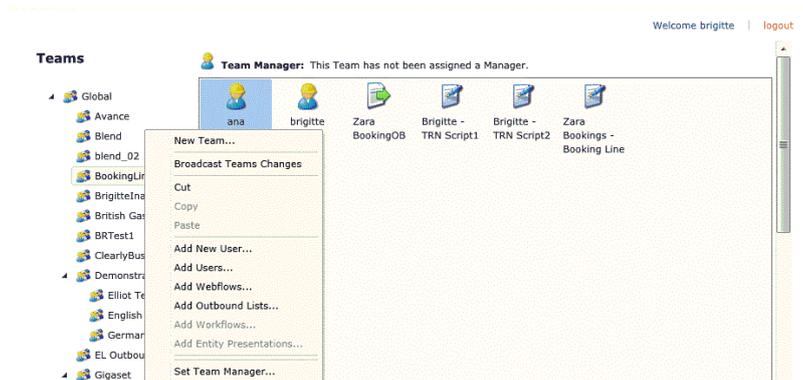
When removing a user from his/ her primary team, a message will prompt you to select a new primary team for that user.



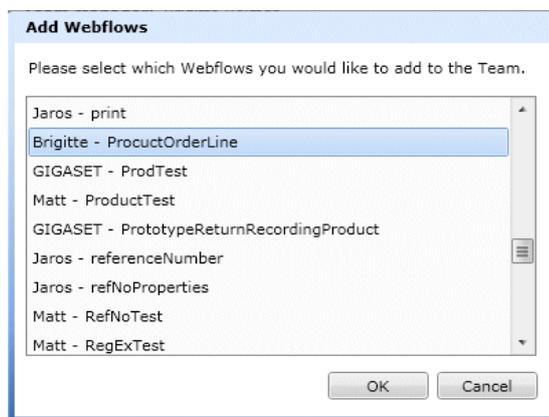
Copying Webflows and Outbound lists to a Team

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

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



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



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



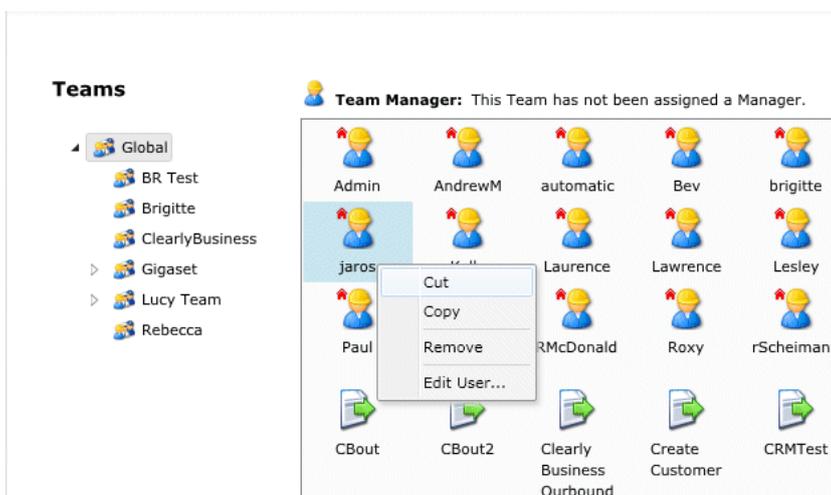
Work Objects that have been copied will remain in their original team(s), as well as being part of the new team.

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

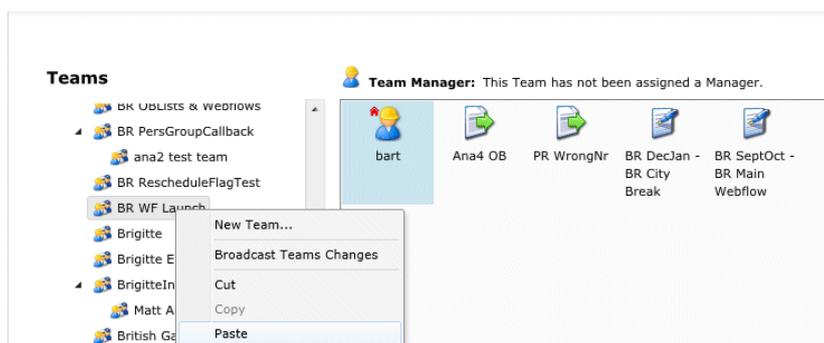
Using Cut & Paste to move Users & Work Object

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.



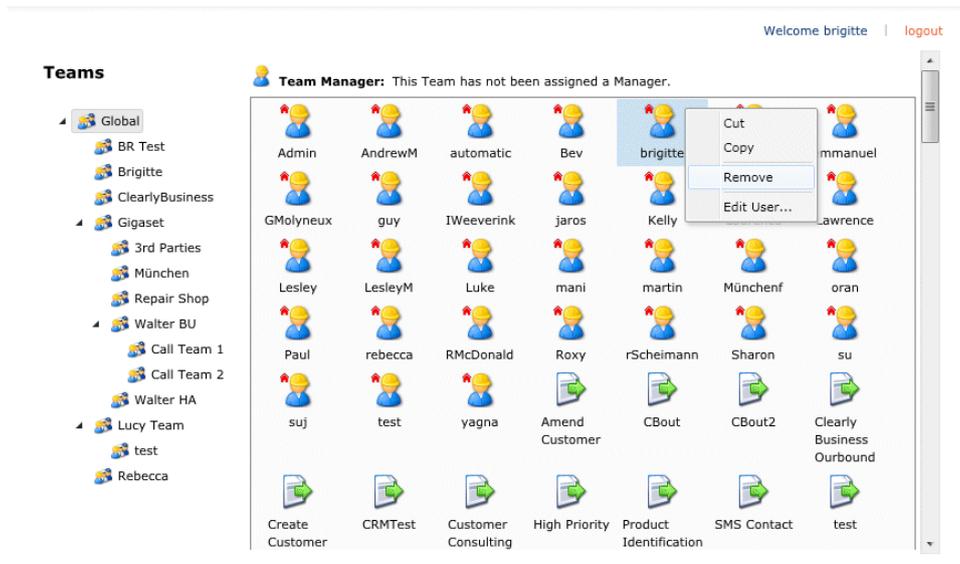
*Users and work objects that are removed from a team using the **Cut & Paste** option will no longer be represented in that team.*

*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

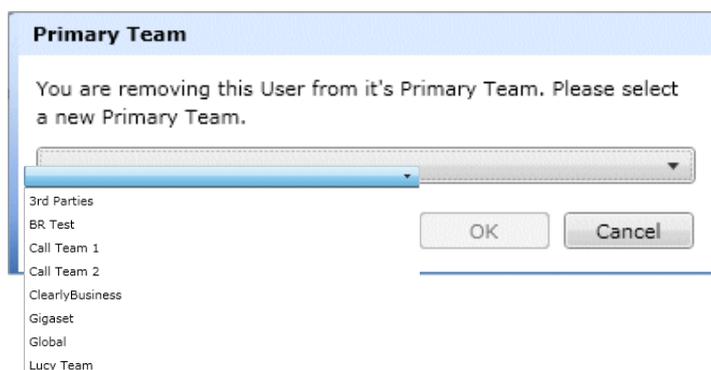
To remove specific agents, (callflows, outbound lists and groups) from a team:

- 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.



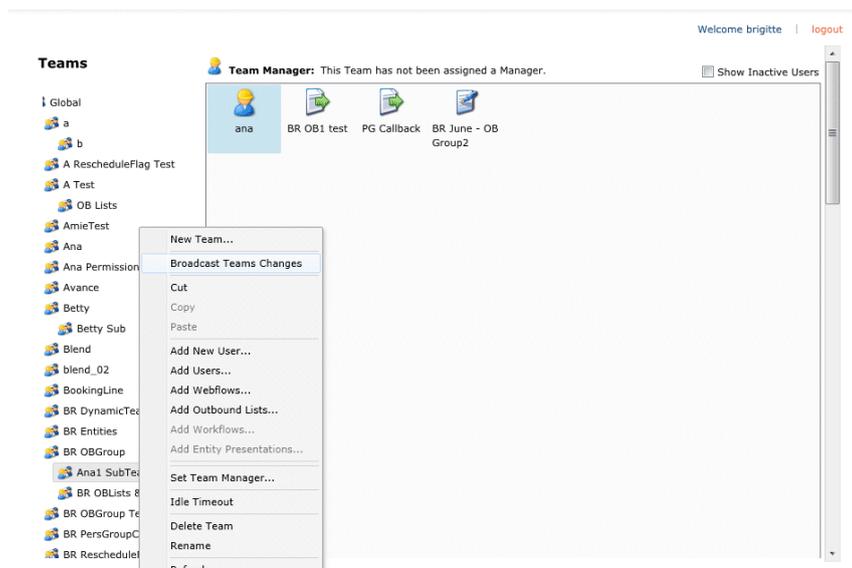
*For team changes to take effect instantly, without agents having to log off and back on again to pick up changes, click **Broadcast Teams Changes**.*

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.



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.

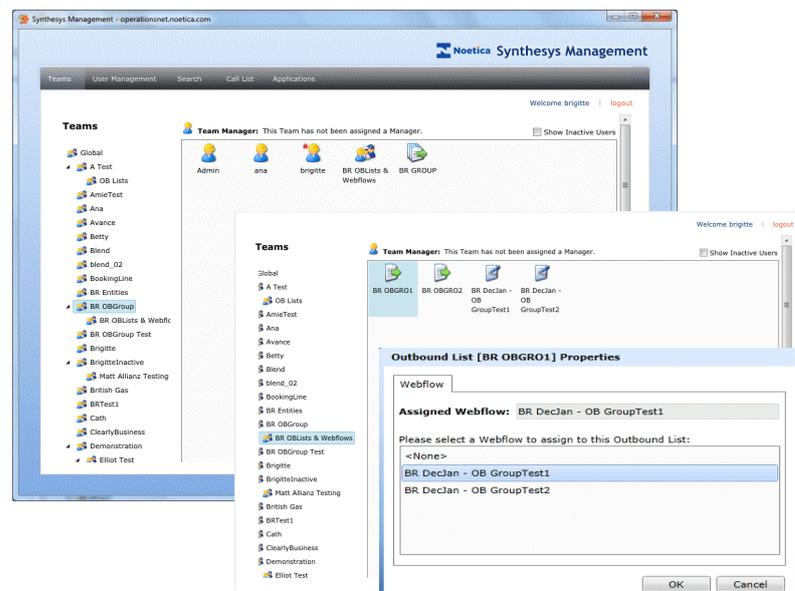
To use outbound groups in Synthesys.Net you need to create two teams, a *main team* to hold the outbound group(s) and agents assigned to the group, and a *sub team* for the individual outbound lists within the group and associated webflows.

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.

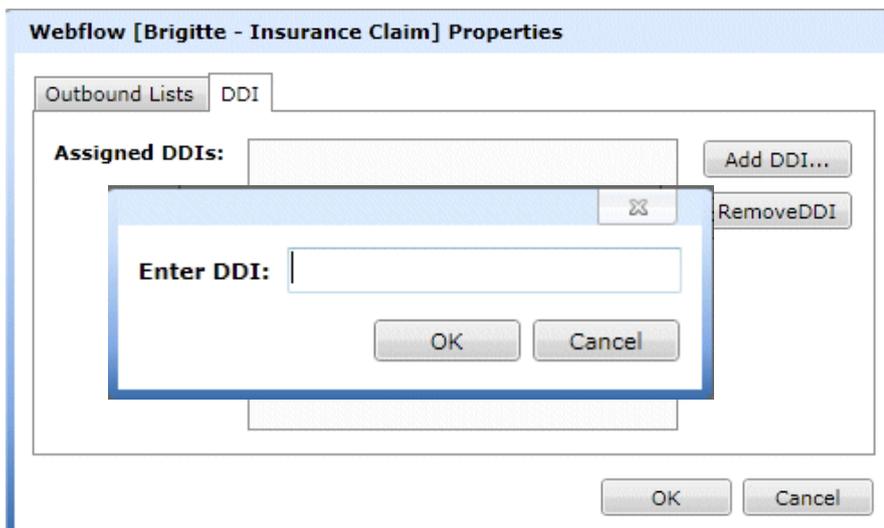
DDI MAINTENANCE

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.



- 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.

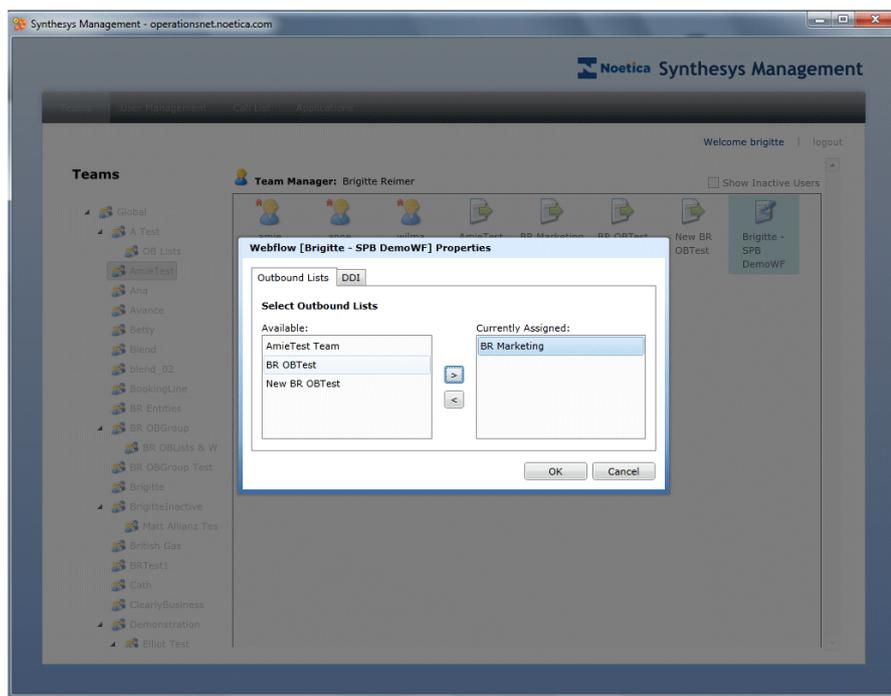
Assigning Outbound Lists to a Webflow

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).



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



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

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

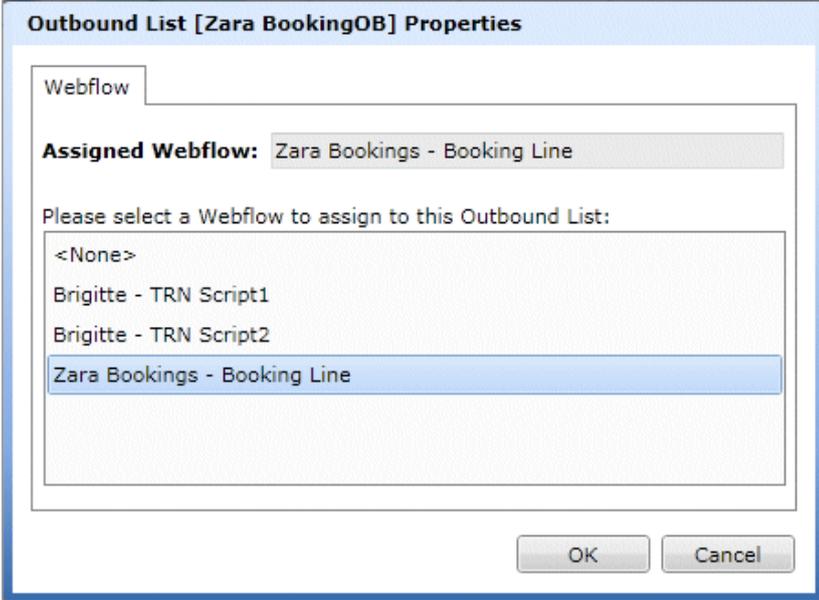
Assigning a Webflow to an Outbound List

To assign a webflow to an Outbound list

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



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



Outbound List [Zara BookingOB] Properties

Webflow

Assigned Webflow: Zara Bookings - Booking Line

Please select a Webflow to assign to this Outbound List:

- <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