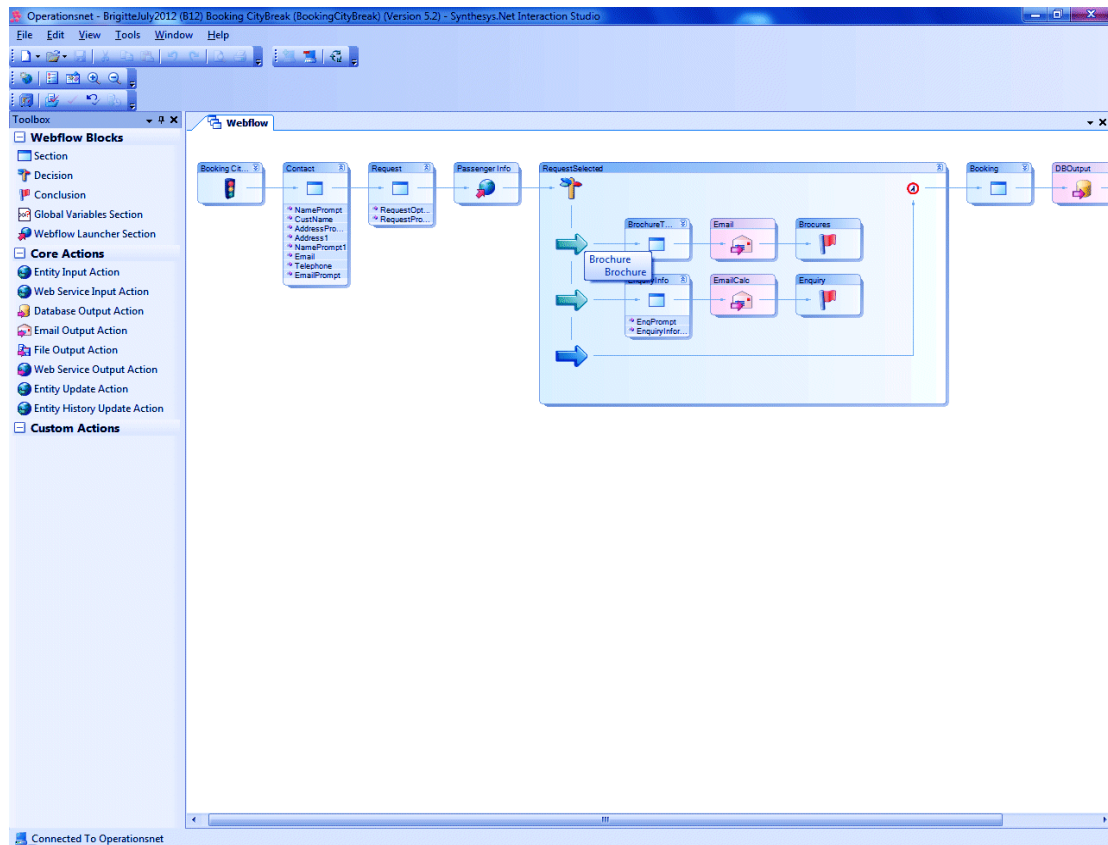


SYNTHESYS.NET INTERACTION STUDIO

Webflow Design



DESIGNING WEBFLOWS

OPENING EXISTING WEBFLOWS	5
Understanding The Open Webflow Screen	6
Checking Out Webflows	7
Checking In Webflows.....	8
CREATING NEW WEBFLOWS.....	9
Setting Up A New Account	10
Entering Account Details	10
Setting up a new Campaign	11
UNDERSTANDING THE WEBFLOW SCREEN	11
Webflow Blocks & Core Actions	13
Designing a Synthesys. Net Webflow.....	14
Viewing Webflow Content	15
Working with a Section.....	16
Adding a New Section to your Webflow	17
Adding a Help Page to a Section	18
Editing Section Details	19
Deleting a Section.....	19
SYNTHESSYS WEB CONTROLS.....	20
Working with Web Controls.....	22
ADDING & CONFIGURING WEB CONTROLS	23
Web Control Name	24
Web Control Settings	25
Validation of Web Controls.....	26
Advanced Properties of Web Controls	27
Editing a Web Control	28
Deleting a Web Control	28
ADDING AGENT DIALOGUE.....	29
Prompt Control - Formatting Toolbar	30
CALCULATION SUBSTITUTIONS.....	31
Enter a Name for the Calculation	31
Selecting Calculation Properties	32
CREATING CUSTOM CALCULATIONS	33
Creating DLLs for Custom Calculations.....	33
Using Custom Calculation in the Webflow.....	35
Maintaining Custom Calculations	35

REGULAR EXPRESSIONS	36
XML File to hold Regular Expression	36
Using Regular Expressions in a Webflow.....	36
DEFINING BRANCHING IN WEBFLOWS.....	37
Adding a Decision to a Webflow.....	38
Adding a Decision Name.....	38
Decision Basis	39
Adding Branches & Conditions.....	40
DEFINING DECISION VARIABLES	41
DEFINING GLOBAL VARIABLES	42
Adding Global Variables Sections	42
Configuring Global Variables.....	43
Using existing Global Variables.....	44
AUTOMATIC TYPE CONVERSION	45
Error handling	45
Logic for Conversion of types.....	45
List of basic data types and their size in Bytes.	46
WEBFLOW LAUNCHER SECTION	47
Webflow Selection	48
Webflow Parameters.....	48
Return Values	49
Loop Condition.....	49
COPYING WEB CONTROLS, SECTIONS & DECISIONS	50
Copying Decisions within Decisions	51
Copying between Webflows	52
WEBFLOW GALLERY	54
Accessing the Webflow Gallery	54
Adding Items to the Webflow Gallery	55
Adding an individual Item	55
Adding Multiple Items.....	56
Using Items from the Webflow Gallery	57
Renaming Items.....	57
Updating Variables.....	58
Editing a Gallery Item.....	59
Mutiple Server Connectivity.....	59

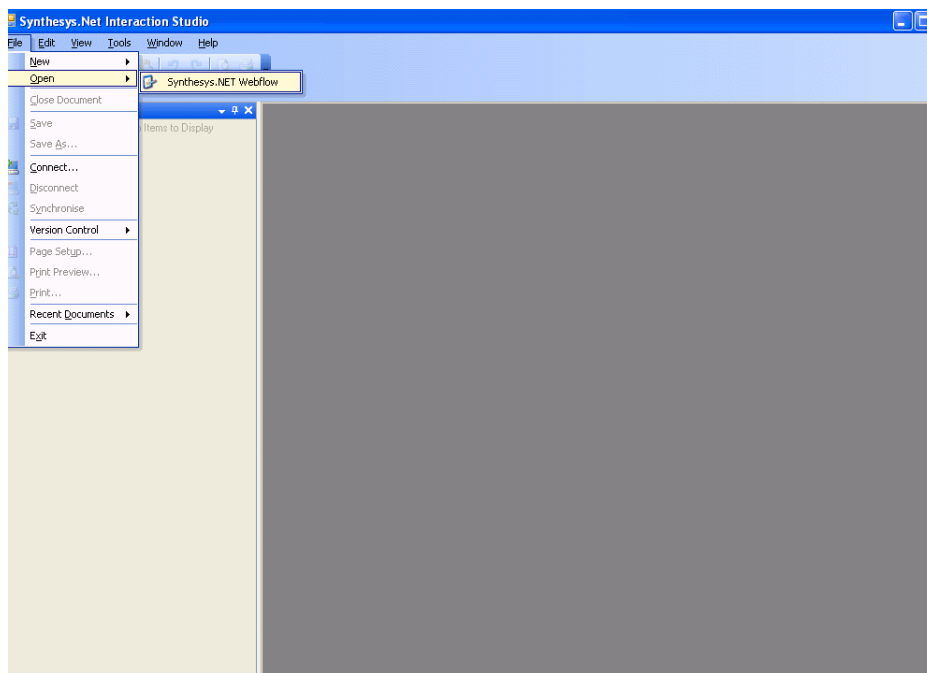
SAVE AS OPTION	60
ADDING CONCLUSIONS	61
Sign off Text.....	61
EDITING LIVE WEBFLOWS IN TEST ENVIRONMENT.....	62
WEBFLOW PROPERTY OPTIONS	64
Properties - Creating CRM Parameters.....	65
Dashboard Configuration	66
Configuration of Parked & Held Info	68
Abort Reasons	69
Reschedule Personal and Group Callbacks	70
Creating Style Templates.....	71
Using Cascading Style Sheets (CSS)	72
PUBLISHING WEBFLOWS.....	77
WEBFLOW VERSIONS	78
Checking out a previous Webflow Version	79

OPENING EXISTING WEBFLOWS

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

To open an existing Synthesys Webflow, go to:

File / Open / Synthesys Webflow.

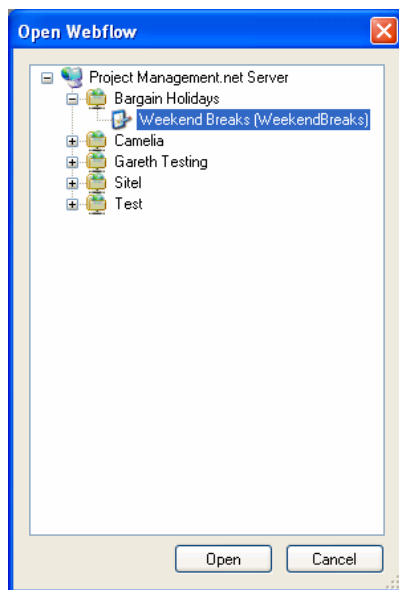





Understanding The Open Webflow Screen




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


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

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



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

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

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

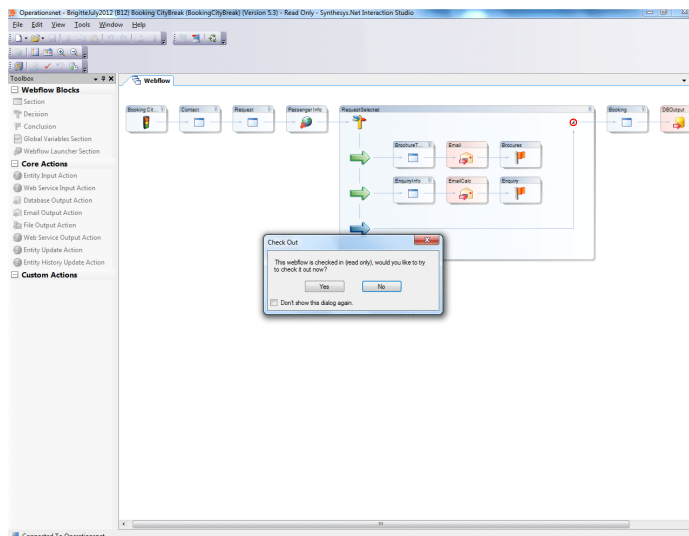
Checking Out Webflows

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

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

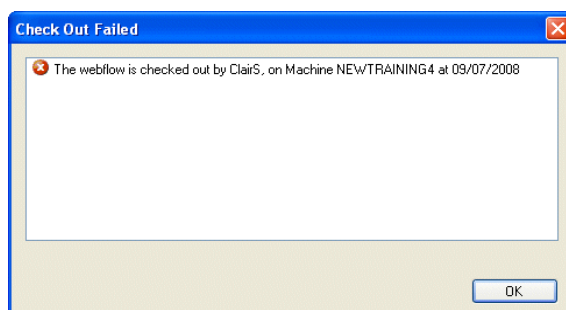
'This Webflow is checked in (read only), would you like to try to check it out now?'

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



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

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

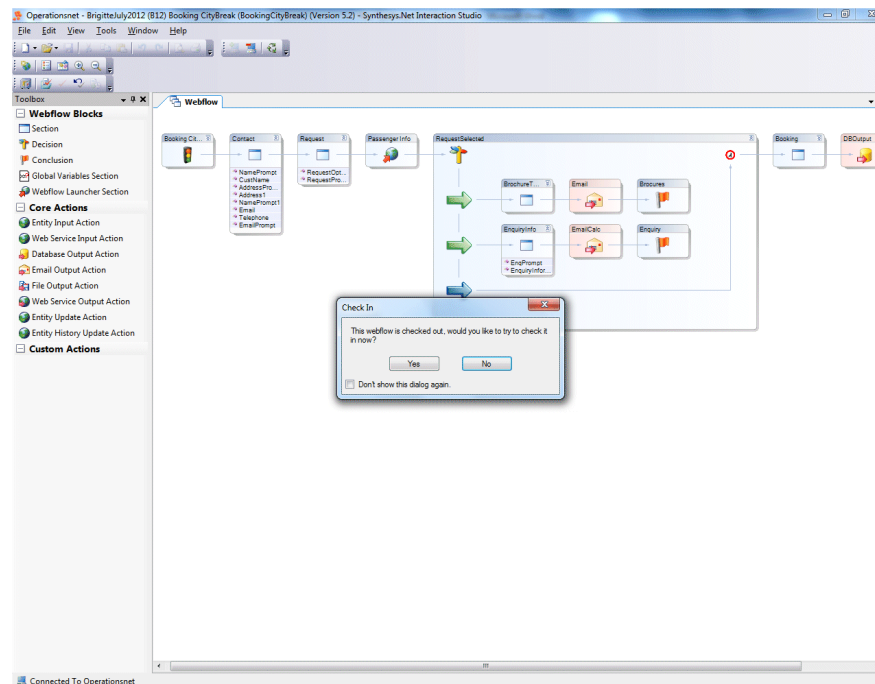


The Webflow needs to be checked in by the listed user, on the named machine, before you can check it out for editing.

Checking In Webflows

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

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



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

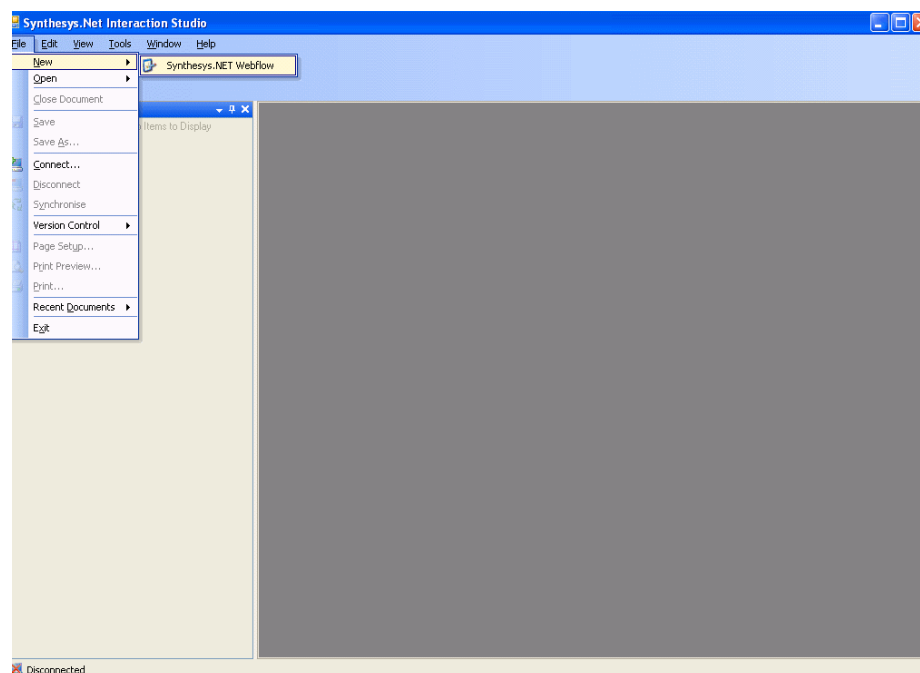


Remember that users can only check out, edit and publish Webflows that are not currently checked out on another machine or by another user.

CREATING NEW WEBFLOWS

To create a new Synthesys Webflow, go to:

File / New / Synthesys Webflow

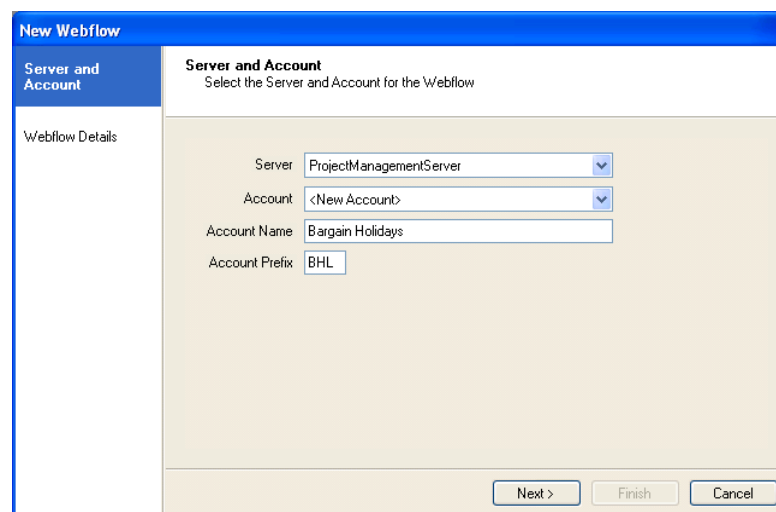


Setting Up A New Account

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

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

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



Entering Account Details

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

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



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

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

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

Setting up a new Campaign

In the New Webflow window

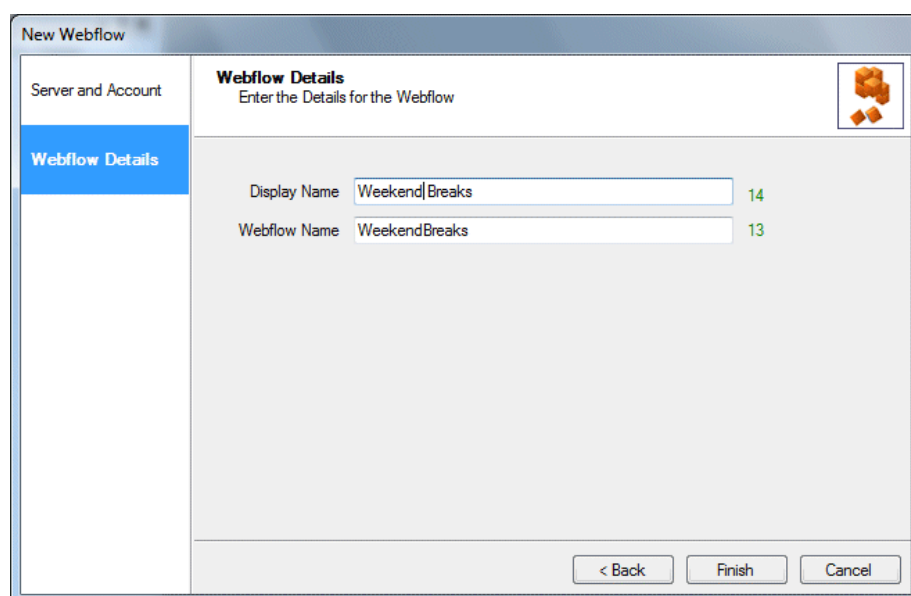
- Enter a **descriptive name** for your Synthesys Webflow in the **Display Name** field.



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

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

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



The screenshot shows a 'New Webflow' window with a sidebar on the left containing 'Server and Account' and 'Webflow Details' (the latter is highlighted in blue). The main area is titled 'Webflow Details' with the subtitle 'Enter the Details for the Webflow'. It contains two text input fields: 'Display Name' with the value 'WeekendBreaks' and a green character count of 14, and 'Webflow Name' with the value 'WeekendBreaks' and a green character count of 13. At the bottom right, there are three buttons: '< Back', 'Finish' (which is highlighted), and 'Cancel'.

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

UNDERSTANDING THE WEBFLOW SCREEN

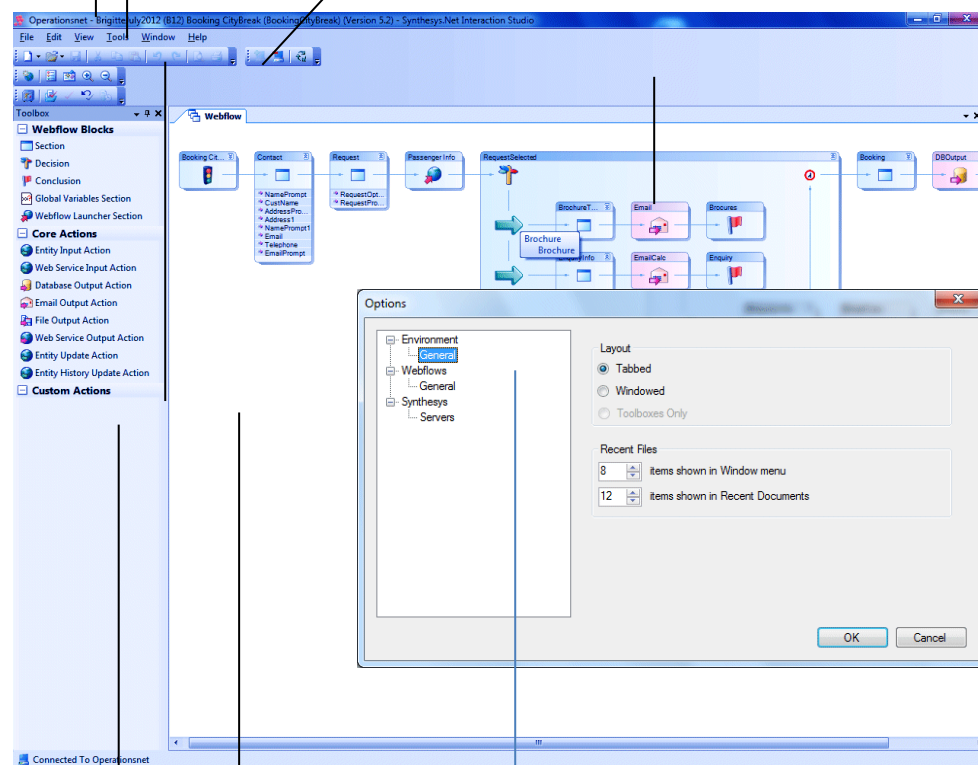
The top of the Synthesys Interaction Studio window now displays the account and Webflow details, together with the version number.

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

Account & Campaign Details

Menu Bar

Toolbars as selected and configured



Webflow Blocks & Core Actions

Webflow Layout: Tabbed Environment

Webflow Design Area
















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

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

Webflow Blocks & Core Actions

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

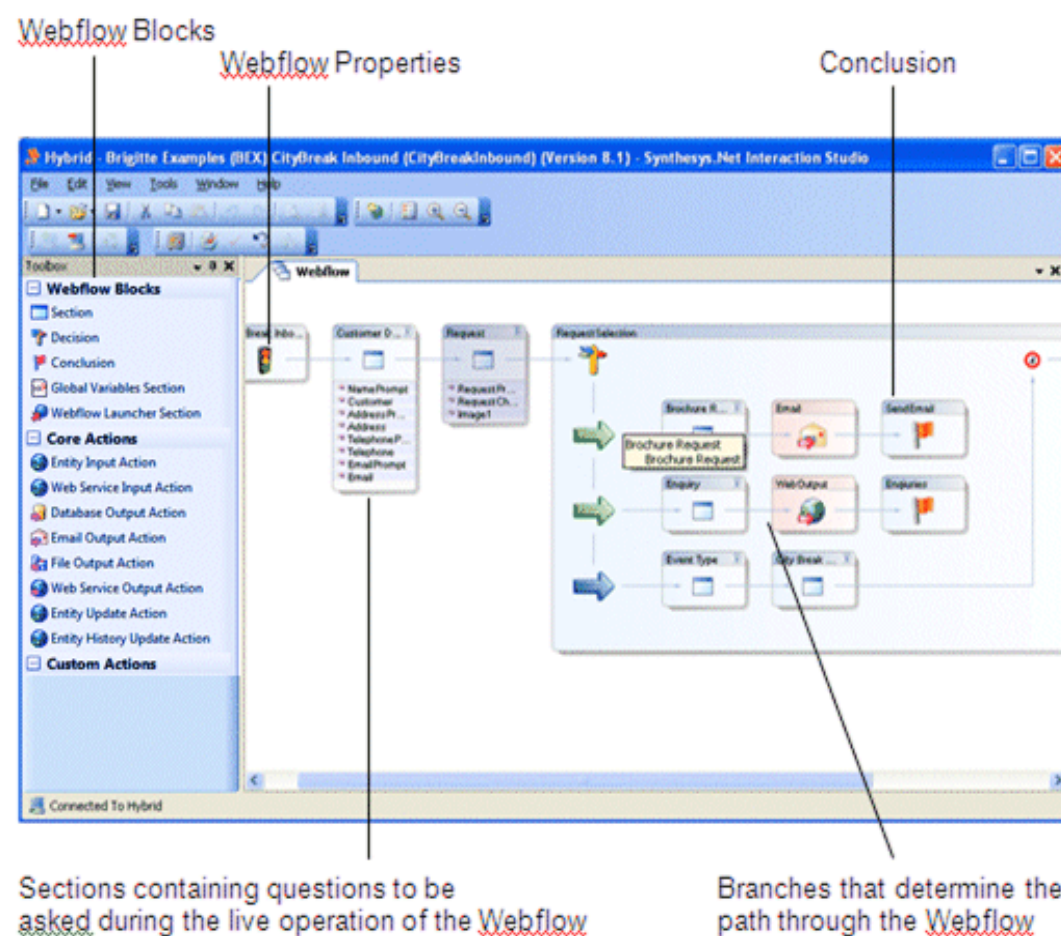
Webflow Blocks	Used To
 Section	Add a new section to the current Webflow and add the questions to be asked when the Webflow is running in a web browser.
 Decision	Add a new decision to the Webflow, to allow the Webflow to react to questions in different ways and to determine the path through a Webflow.
 Conclusion	Add a new conclusion point to a particular area to end the Webflow.
 Global Variables Section	Allow users to set and/or create global variables and decide its type, i.e. integer, double, character, string, datetime, boolean & listitemcollection.
 Webflow Launcher Section	Allow users to launch webflows within a webflow and pass parameters between the webflows.
Core Actions	Used To
 Entity Input Action	Utilize specific CRM/ Entity details within a webflow, for example to enable branching, in calculations or the dashboard.
 Web Service Input Action	Enable connection to a web service to return data for use in a Synthesys Webflow at runtime.
 Database Output Action	Allow data from a Web call to be exported to a selected Database.
 Email Output Action	Enable users to send an instant email as part of the Webflow.
 File Output Action	Export data from a Web call as a comma separated file.
 Web Service Output Action	Enable connection to a web service to export data from a Synthesys Webflow at runtime.
 Entity Update Action	Allows data to be written back to the Entity table.
 Entity History Update Action	Allows data to be written back to the History table.

Designing a Synthesys. Net Webflow

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


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

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

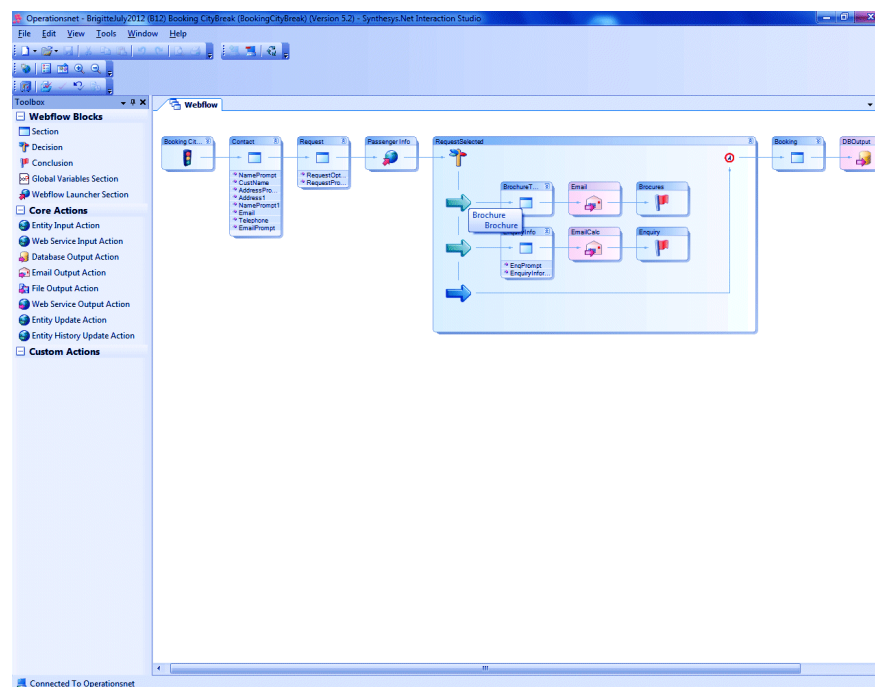


Viewing Webflow Content


Section Content

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

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



Display Branches

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


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

Working with a Section


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

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

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

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

Adding a New Section to your Webflow

To add a new section, select the section  symbol from the *Webflow Blocks* column of the Toolbox, on the left hand side.

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

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

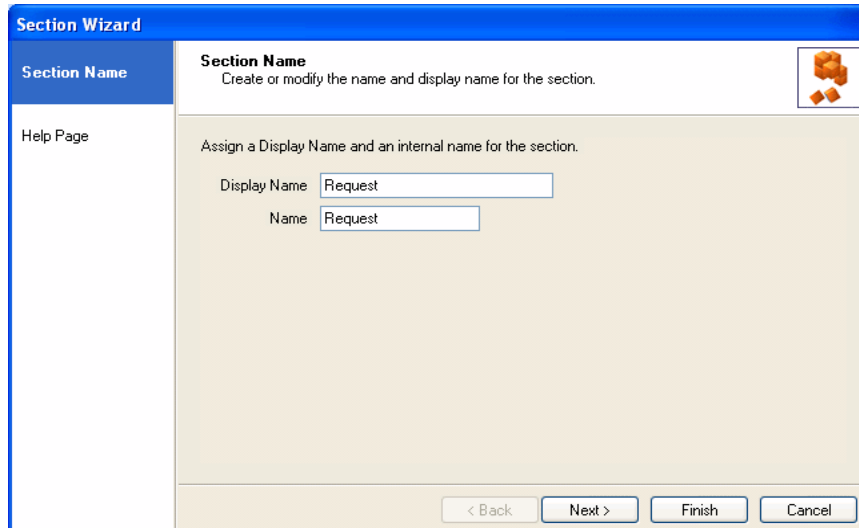


Descriptive section names help users to navigate through the webflow.

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

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

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



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

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

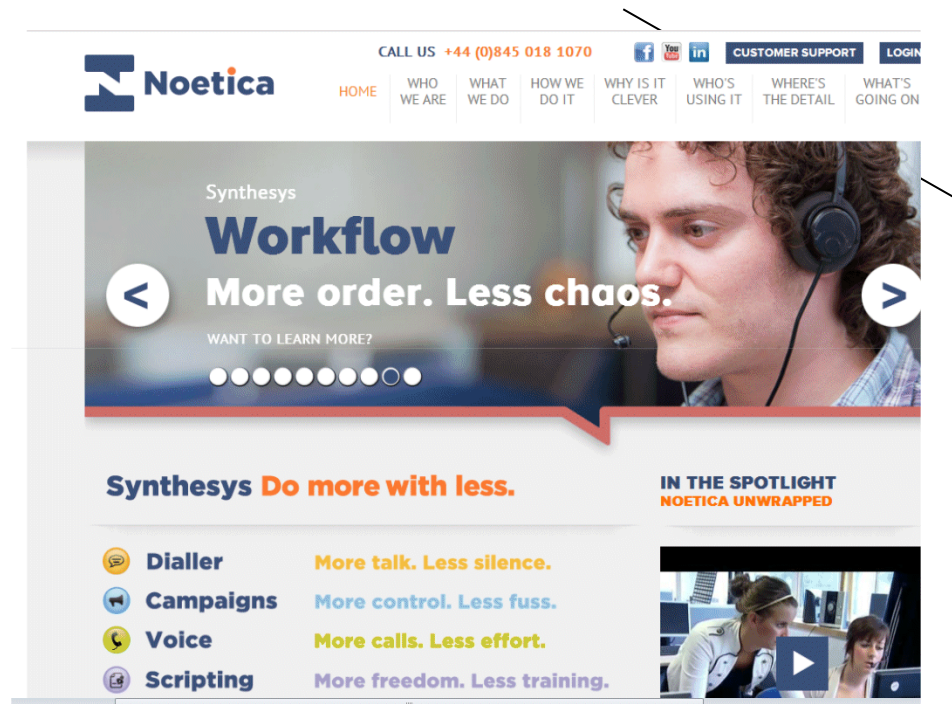
Adding a Help Page to a Section

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

Enter the web address for the required Help Page.

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

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

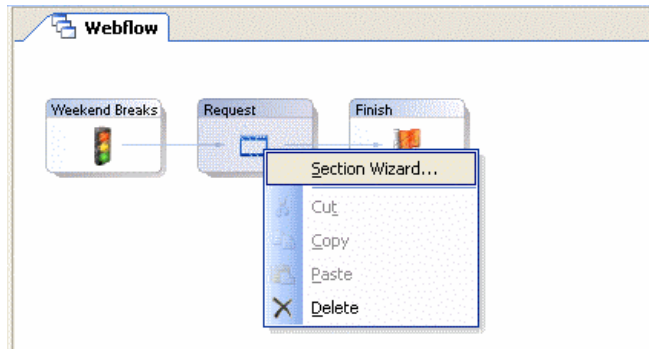


Click **Finish** to add the section to your Webflow.

Editing Section Details

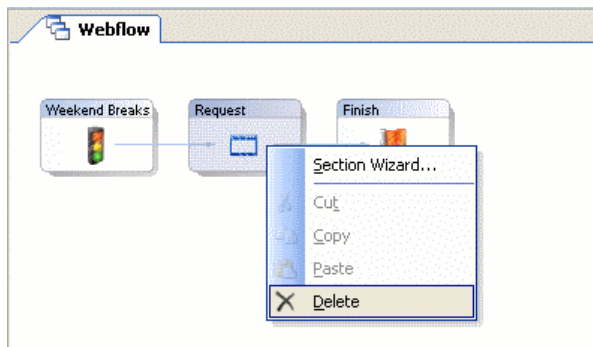
To edit a section, for example to change the section name or to add a Help Page, **right click** on the section and select the **Section Wizard** option.

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



Deleting a Section














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













SYNTHESSYS WEB CONTROLS

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

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

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

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

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

Working with Web Controls

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

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

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


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

ADDING & CONFIGURING WEB CONTROLS

To add a Web control to a section

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

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

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

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



Each Web control has a set of available properties. When you click the Next> button, the Control Wizard will systematically guide you to each option. Alternatively, simply click the desired option in the panel on the left hand side.

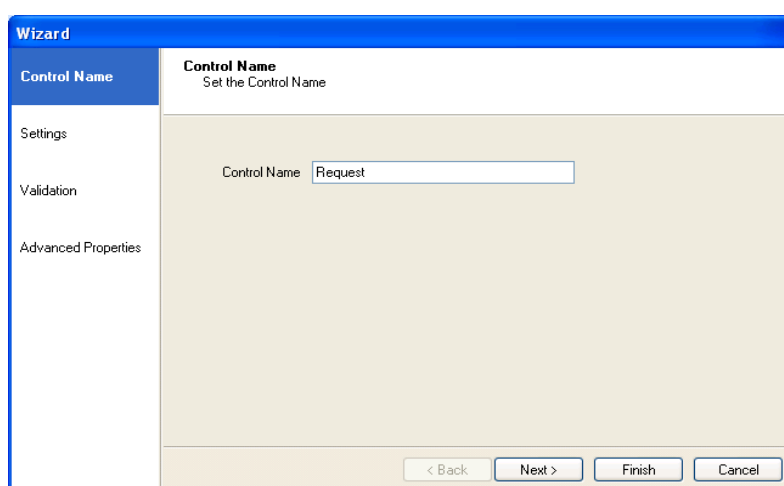
Web Control Name

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



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

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



The screenshot shows a window titled "Wizard" with a blue header. On the left is a sidebar with four options: "Control Name" (selected and highlighted in blue), "Settings", "Validation", and "Advanced Properties". The main area is titled "Control Name" with the subtitle "Set the Control Name". It contains a text input field labeled "Control Name" with the value "Request" entered. At the bottom right of the main area are four buttons: "< Back", "Next >", "Finish", and "Cancel".

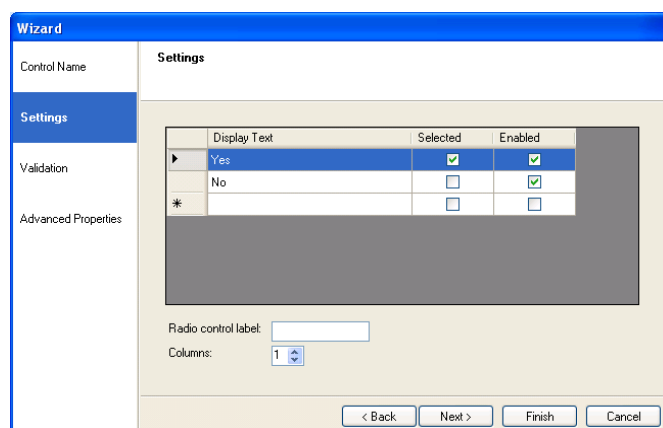
Click **Next>**, to move to the **Settings page** of the Wizard, to continue the configuration of the Radio web control.

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

Web Control Settings

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

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



Display Text	Selected	Enabled
Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
No	<input type="checkbox"/>	<input checked="" type="checkbox"/>
*	<input type="checkbox"/>	<input type="checkbox"/>

Radio control label:

Columns:

< Back Next > Finish Cancel

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

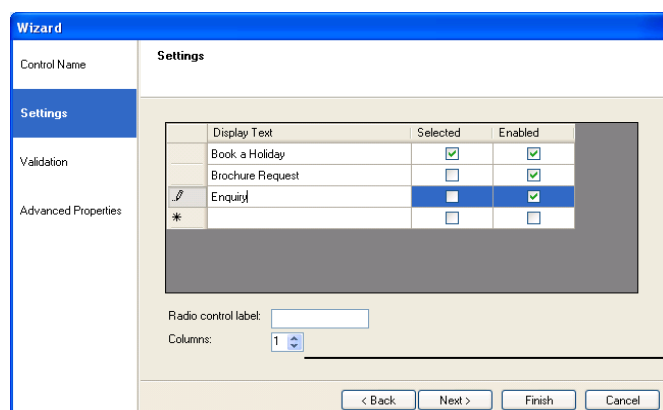
Note: To edit the text entered, double click the option in the display text and type in the new text. To add new options, double click in the display text column next to the *.

Selected: if ticked indicates that the specific option will by default be selected.

Enabled: if ticked indicates that this option is available for the user to select.

Radio control label: if you like, you can attach a label to the control.

Columns: you can select the number of columns to be displayed, i.e. '1' column.



Display Text	Selected	Enabled
Book a Holiday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Brochure Request	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Enquiry	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
*	<input type="checkbox"/>	<input type="checkbox"/>

Radio control label:

Columns:

< Back Next > Finish Cancel

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

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

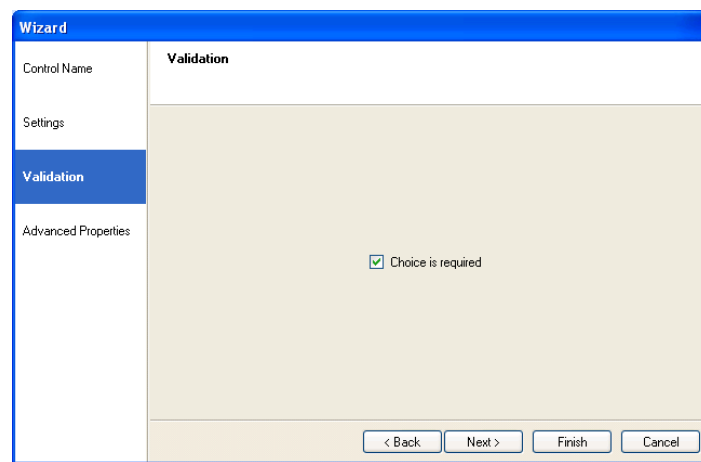
Click **Next**, to move to the Validation page of the Wizard.

Validation of Web Controls

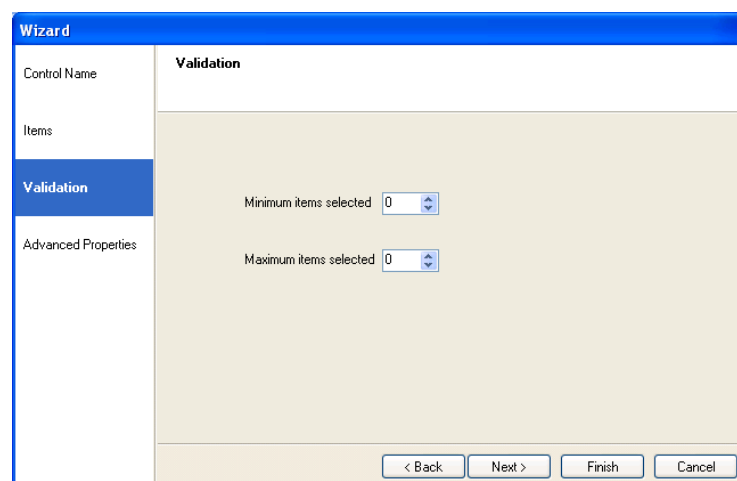
To record specific information, necessary to produce accurate and meaningful reports, you may wish to **make selected fields** within the control **compulsory**.

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

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



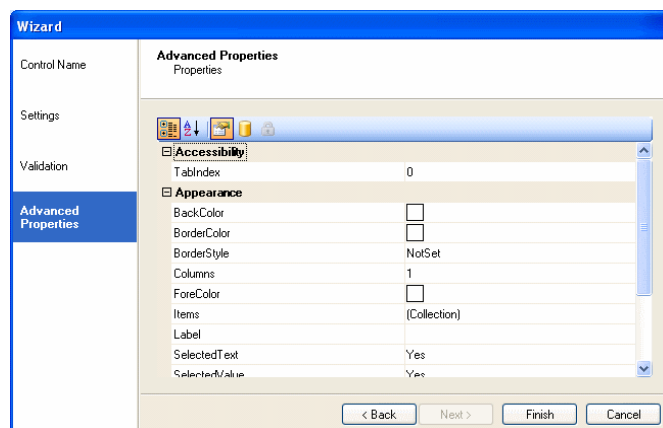
In case of the **Check Box web control**, you can select the minimum and maximum of items that can be selected.



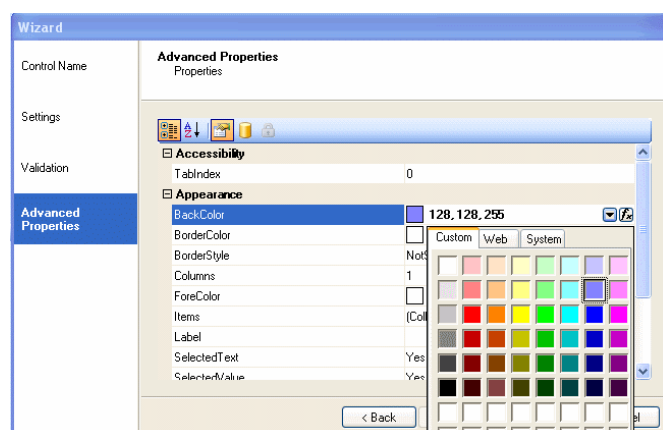
Click **Next>**, to move to the **Advanced Properties page** of the Wizard.

Advanced Properties of Web Controls

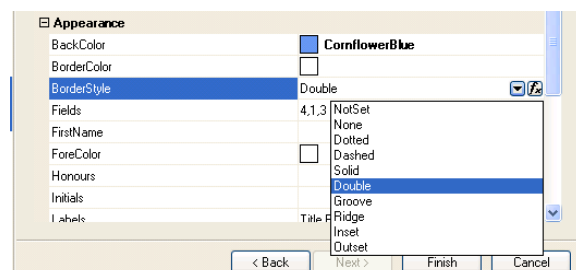
In the **Advanced Properties** page of a Web control, you can change the appearance and behaviour of a control, for example, set background and border colours.



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



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



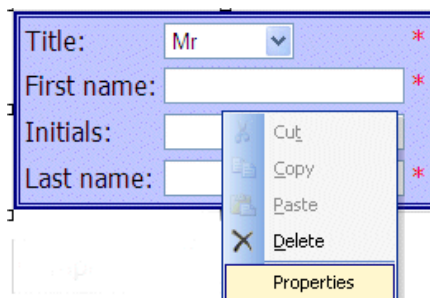
Click **Finish**, to display the configured web control in the Webflow design area.

Editing a Web Control

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

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

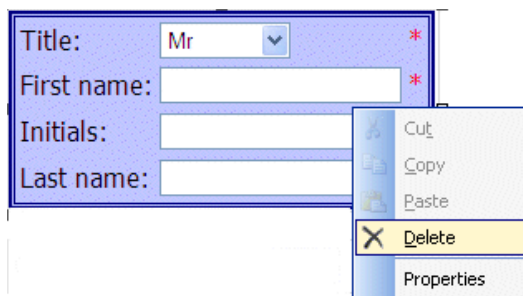
The **stars** indicate fields that have been set to be **compulsory** in the *Validation page* of the control properties.



Deleting a Web Control

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

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

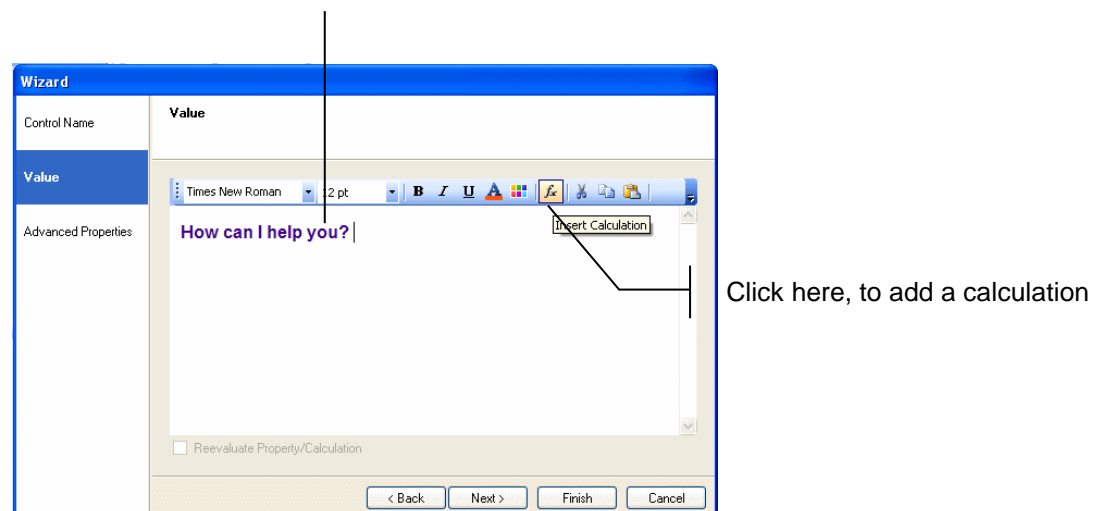


ADDING AGENT DIALOGUE

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

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

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



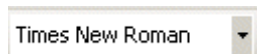










Click **Finish**, to display the configured Web control in the Webflow design area.

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

Prompt Control - Formatting Toolbar

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

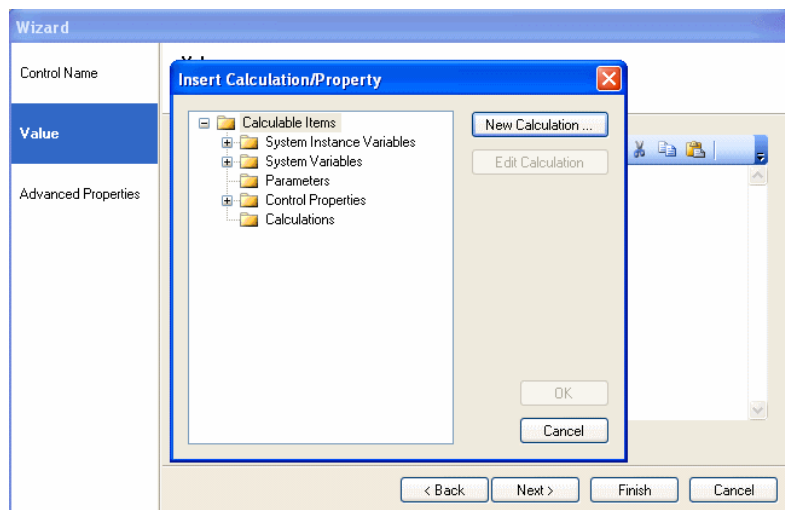


Option	Used to...
	Change the typeface of the currently selected text.
	Change the font size of the selected text.
	Apply bold to the selected text. Click on the button again to remove bold from the selected text.
	Apply italics to the selected text. Click on the button again to remove italics from the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

CALCULATION SUBSTITUTIONS

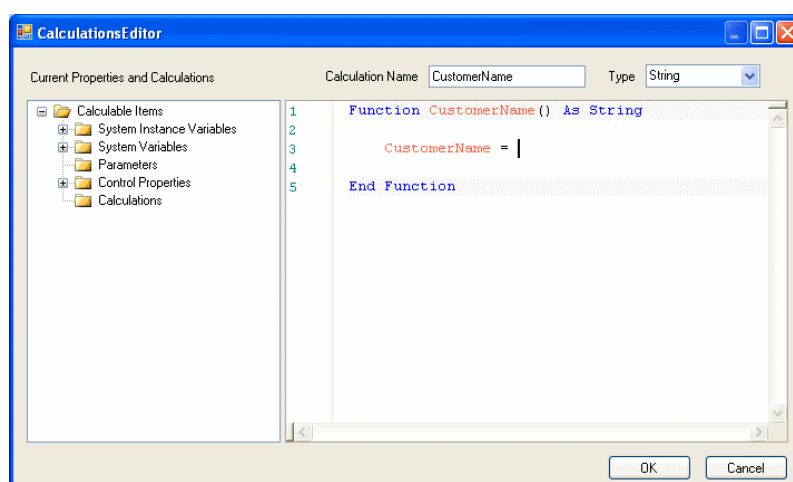
You can use a calculation substitution to bring forward the customer name that has been taken in a previous section.

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



Enter a Name for the Calculation

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

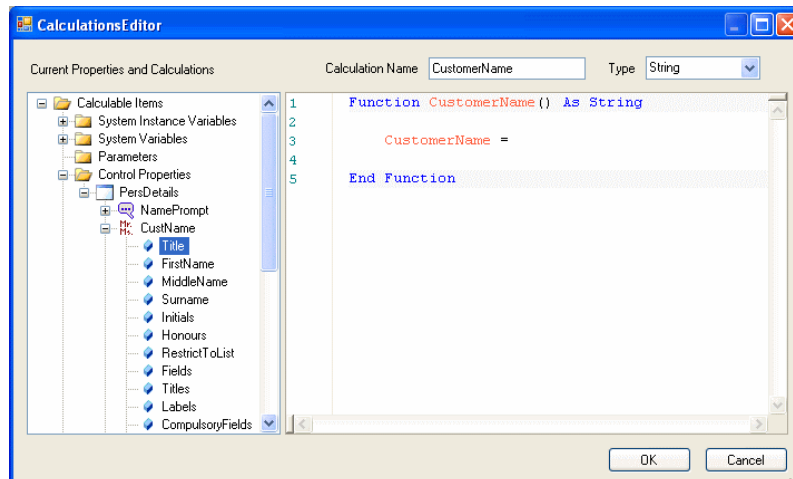


Selecting Calculation Properties

To select the required property for the calculation

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

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



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

Function *CustomerName*() As String

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

End Function

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

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

CREATING CUSTOM CALCULATIONS

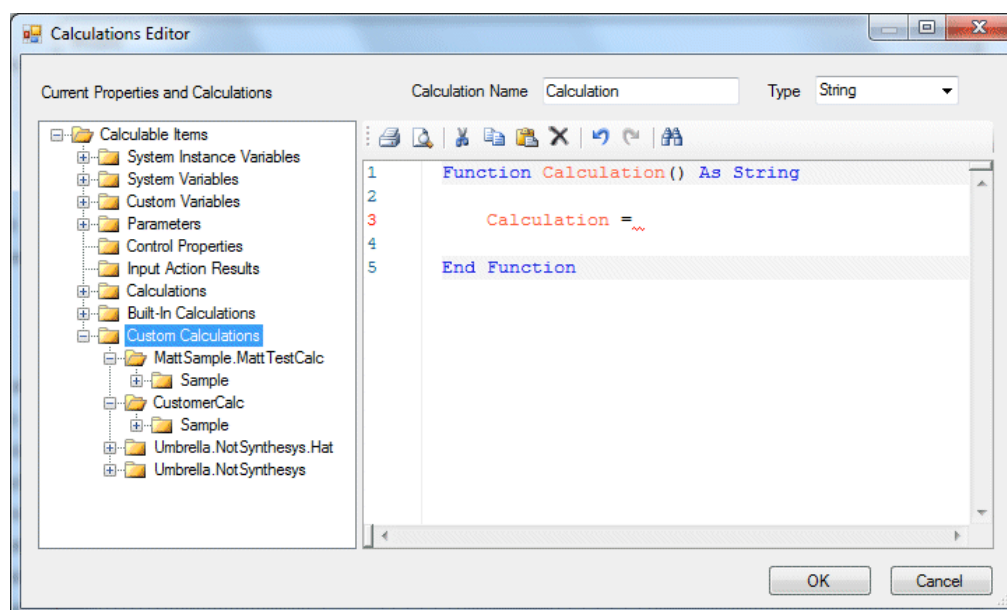
The more technical users of Synthesys can also create dll's (**Dynamic-link library**) in an external application and embed them within the Synthesys calculations engine.

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

Creating DLLs for Custom Calculations

In order to create a custom calculation

A dll should be created and placed on the Synthesys server. There will be a directory on the Synthesys server called **Calculations → Custom Calculations**. Any dll's put into this directory will be synchronised with the Synthesys Interaction Studio when the user synchronises the client machine with the server.
Once Synchronised, users will see the dll's in the tree within the **Calculations Editor**.



Please see next page for more information.

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

The **Namespace** will be shown as the top level in the tree (*SPB.Synthesys Custom Functions*)

Any **Public classes** defined will be the next level in the tree (*Customer Functions*)

Any **Public Static methods** will be the final level in the tree

Example

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

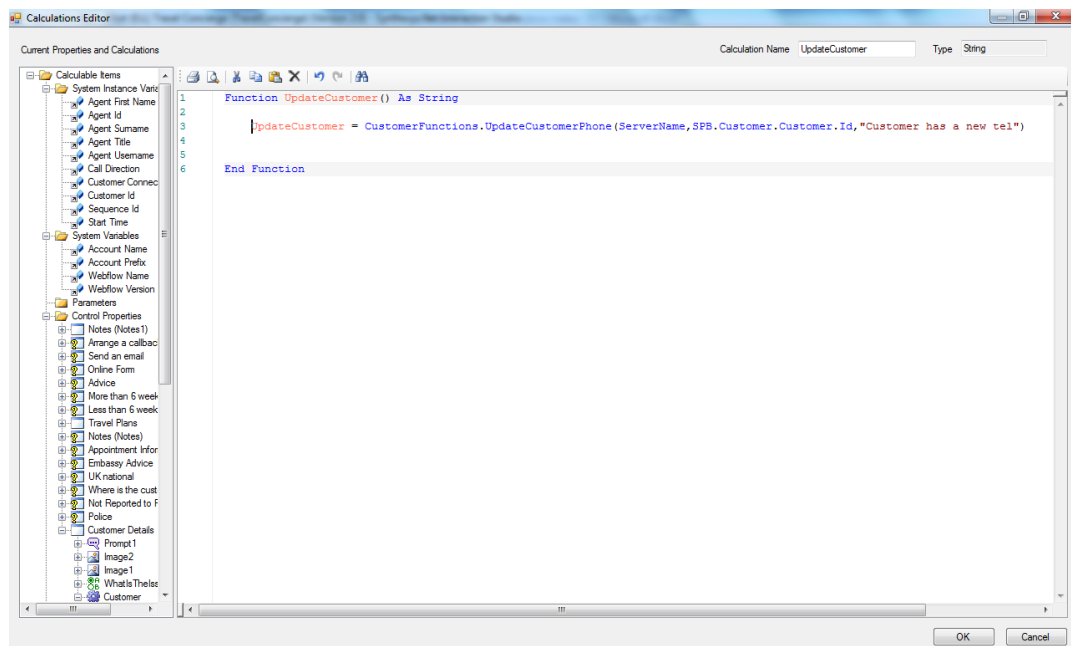
```
namespace SPB.Synthesys.CustomFunctions
{
    public class CustomerFunctions
    {
        public static bool AddCustomerAudit(string UrlBase, string
CustomerId, string Audit)
        {
            try
            {
                Uri uri = new Uri(UrlBase, "/AddAuditItem");
                // ...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

Using Custom Calculation in the Webflow

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

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

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



Maintaining Custom Calculations

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

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



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

REGULAR EXPRESSIONS

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

XML File to hold Regular Expression

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

The XML file should look like the following example:

```
<Regular Expressions>

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

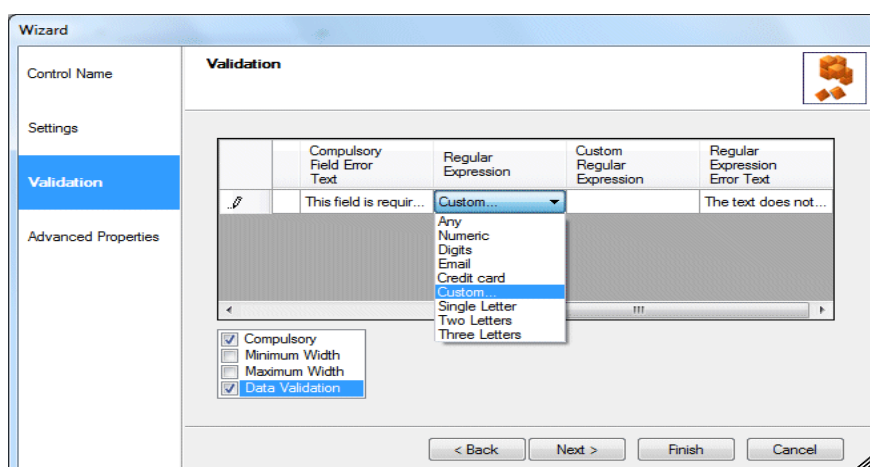
</Regular Expressions>
```

Using Regular Expressions in a Webflow

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

To pick up a regular expression

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



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

DEFINING BRANCHING IN WEBFLOWS

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

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



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

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


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

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

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

Adding a Decision to a Webflow

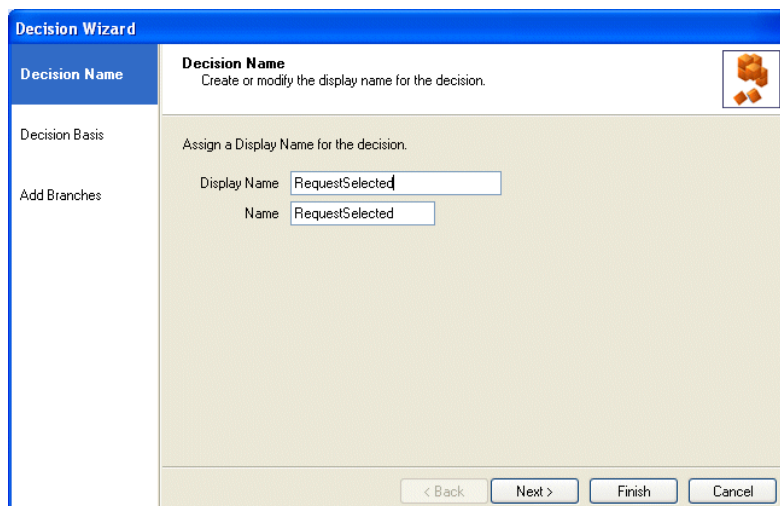
In our example, the path through the Webflow is to change, depending on the option a user selects in the **Radio Web control** in the **Request section**. To enable branching, we need to drop a decision on the line after the **Request** section.

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

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

Adding a Decision Name

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



The screenshot shows the 'Decision Wizard' window with the 'Decision Name' tab selected. The main area contains the following text and fields:

- Decision Name**
Create or modify the display name for the decision.
- Assign a Display Name for the decision.
- Display Name:
- Name:

At the bottom, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

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

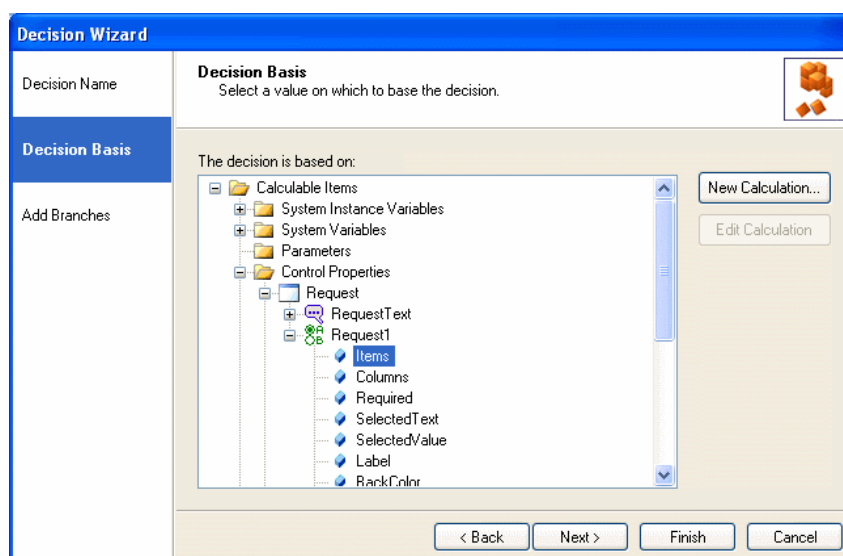
Please see next page for more information.

Decision Basis

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

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

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



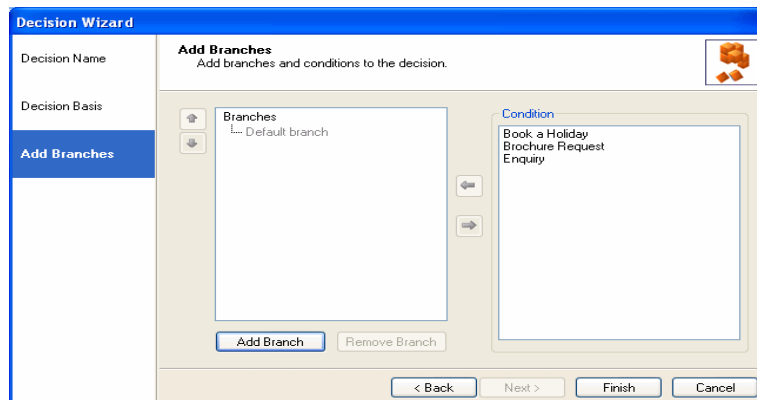
- Click **Next>** to move to the '**Add Branches**' page of the Wizard, or alternatively simply click the 'Add Branches' option on the left side of the Wizard.

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

Adding Branches & Conditions

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

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



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

The default branch can't be renamed

Adding Conditions to Branches

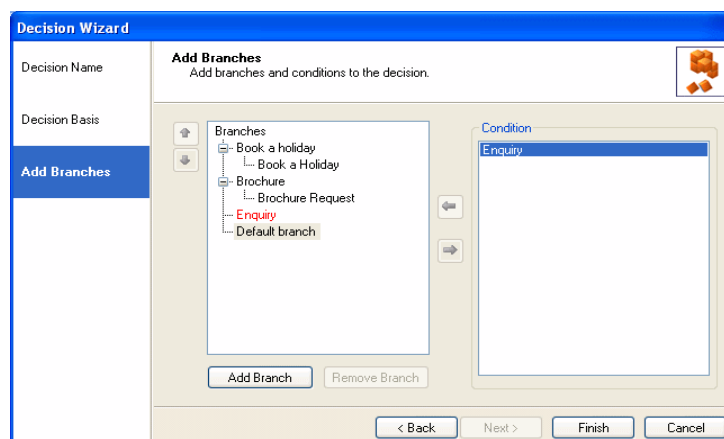
- Highlight** your **branch**, **select** the appropriate **condition(s)** on the right hand side, and **use the arrow** button to move the condition into the branch.



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

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


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



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

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

DEFINING DECISION VARIABLES

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



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

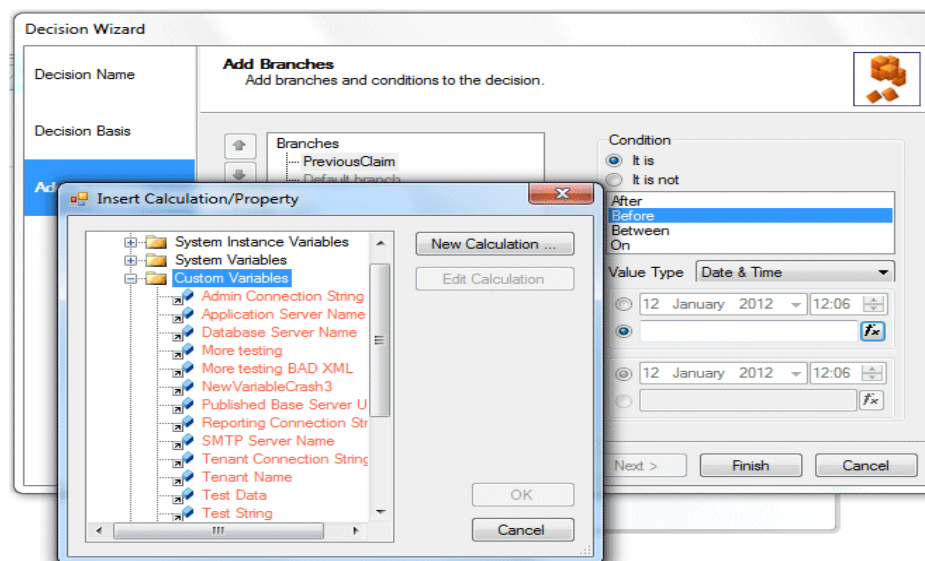
In the **Add Branches** page of the wizard you have the option to compare a variable to an immediate or a variable value.

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

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

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

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



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


DEFINING GLOBAL VARIABLES

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

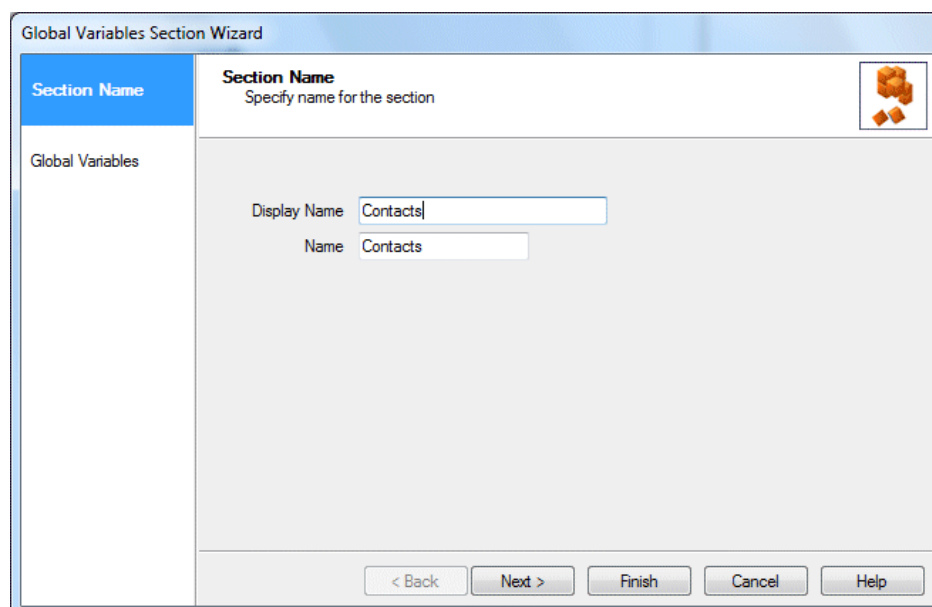
When creating new global variables, users first select its type, i.e. integer, double, character, string, datetime, boolean or listitemcollection from a drop down menu, and then define the variable by selecting the relevant information via the *Insert Calculation Property* dialog.

Adding Global Variables Sections

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

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

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



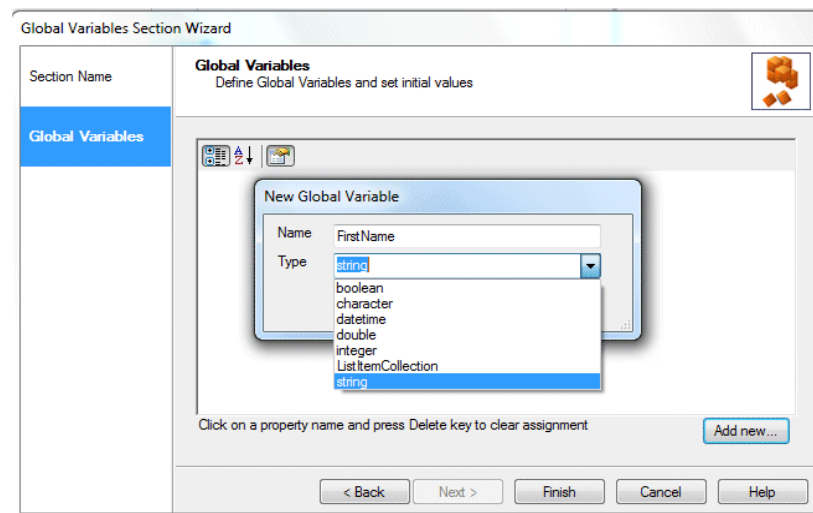
The image shows the 'Global Variables Section Wizard' dialog box. It has a title bar 'Global Variables Section Wizard'. On the left is a sidebar with 'Section Name' selected. The main area has a 'Section Name' label with the instruction 'Specify name for the section'. Below this, there are two input fields: 'Display Name' with the text 'Contacts' and 'Name' with the text 'Contacts'. At the bottom are five buttons: '< Back', 'Next >', 'Finish', 'Cancel', and 'Help'.


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

Configuring Global Variables

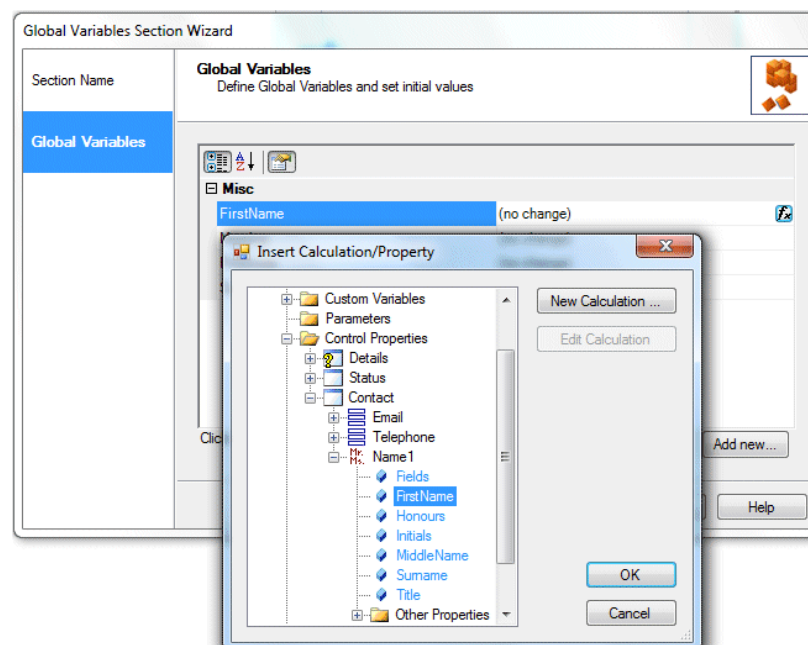
In the Global Variables page of the wizard

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




To define the variable click on the calculations  icon.

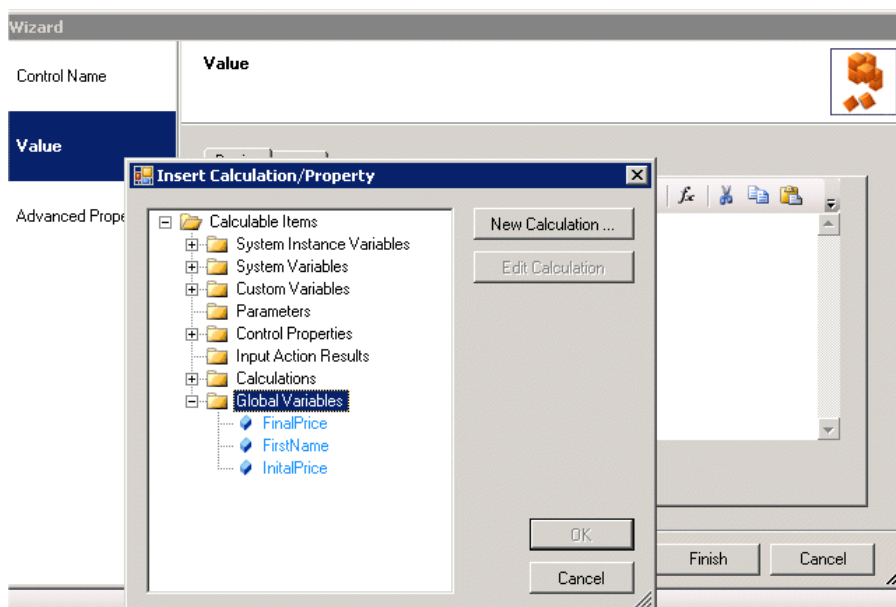
- Locate and select the relevant information in the **Insert Calculation Property** dialog
- or create a **New Calculation** to define the variable.




Using existing Global Variables

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

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



AUTOMATIC TYPE CONVERSION

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

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

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

Error handling

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

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

Logic for Conversion of types

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

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

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

List of basic data types and their size in Bytes.

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

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


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

WEBFLOW LAUNCHER SECTION

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

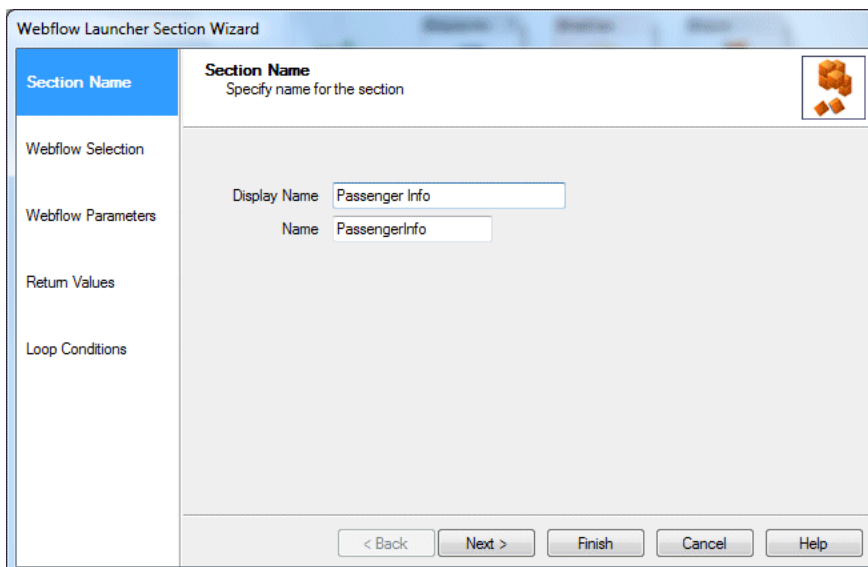
When running calls in the Synthesys.Net Portal in the Web Browser, users initially go through the sections of the main webflow. At the appropriate point, the embedded webflow will open. Having taken the relevant details, users will then return to the main webflow to complete the call.

To add the *Webflow Launcher* section to your Webflow

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

Section Name

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

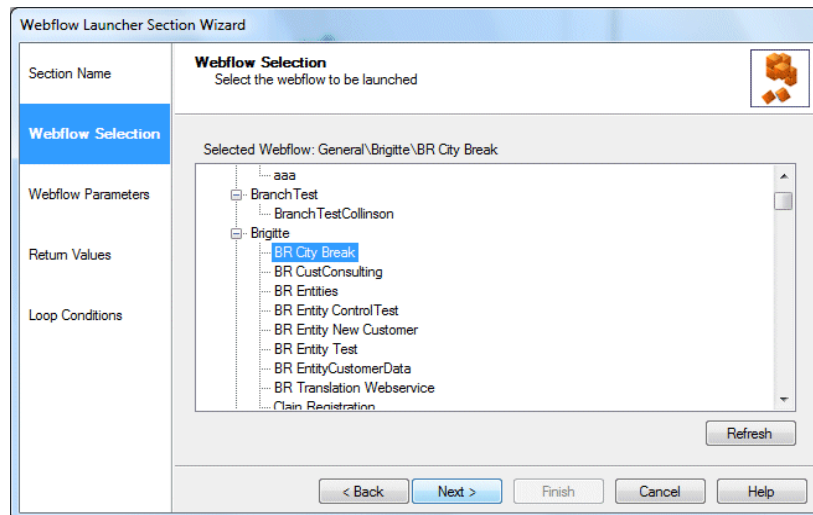


The image shows a 'Webflow Launcher Section Wizard' dialog box. It has a sidebar on the left with five options: 'Section Name' (selected), 'Webflow Selection', 'Webflow Parameters', 'Return Values', and 'Loop Conditions'. The main area is titled 'Section Name' with the instruction 'Specify name for the section'. It contains two text input fields: 'Display Name' with the value 'Passenger Info' and 'Name' with the value 'PassengerInfo'. At the bottom right, there are five buttons: '< Back', 'Next >', 'Finish', 'Cancel', and 'Help'.

Webflow Selection


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

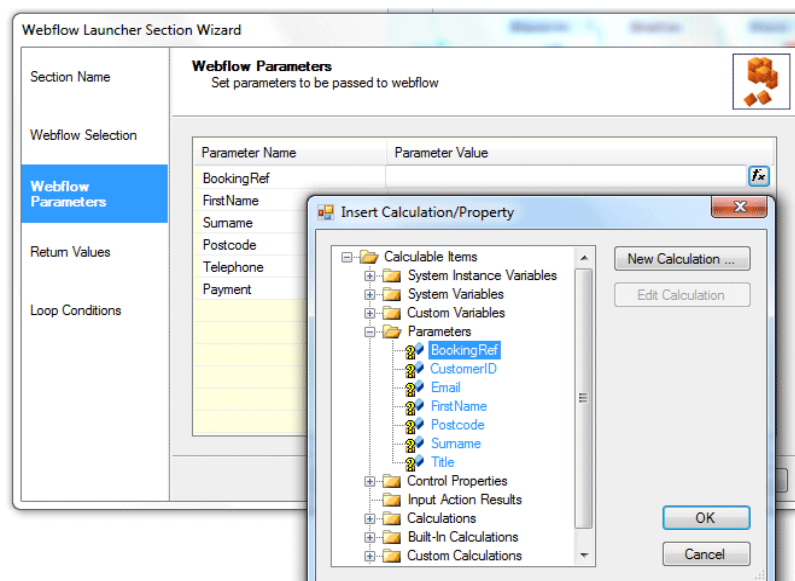
- Locate and select the webflow that you wish to launch in the Webflow section.
- Click *Next>*, to move to the *Webflow Parameters* page.



Webflow Parameters


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

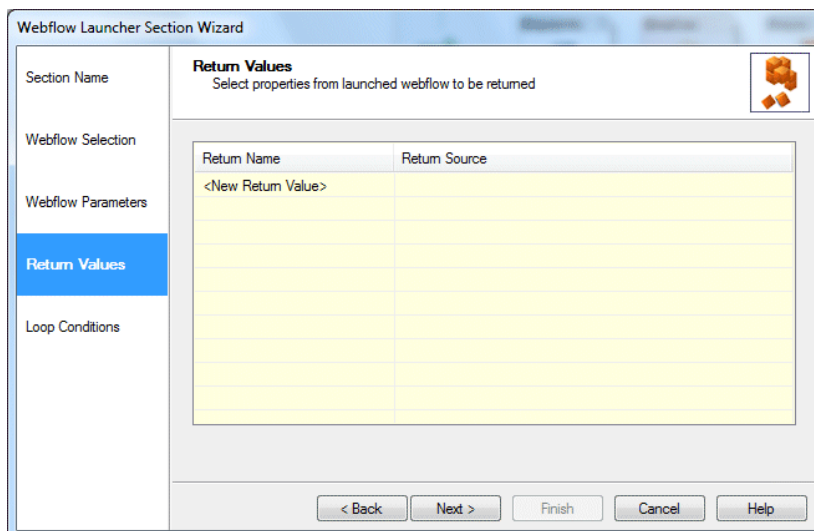
- Click into the **Parameter Value** field and then the calculation  icon.
- In the *Insert Calculation/Property* dialog select the folder (e.g. *Parameters* or *Control Properties*) and fields that contain the information to be displayed in the popped webflow.



Return Values

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

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



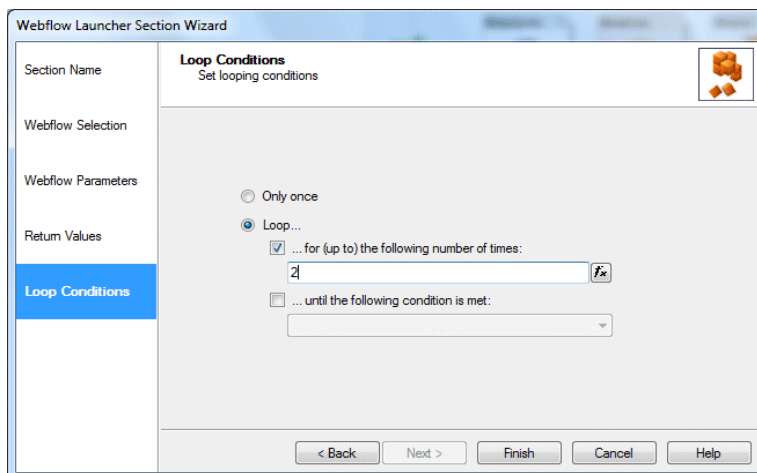
The dialog shows the 'Return Values' section of the 'Webflow Launcher Section Wizard'. The left sidebar has 'Return Values' selected. The main area has a title bar 'Return Values' and a subtitle 'Select properties from launched webflow to be returned'. Below this is a table with two columns: 'Return Name' and 'Return Source'. The first row contains '<New Return Value>' and is highlighted in yellow. There are five empty rows below it. At the bottom are buttons: '< Back', 'Next >', 'Finish', 'Cancel', and 'Help'.

Return Name	Return Source
<New Return Value>	

Loop Condition

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

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




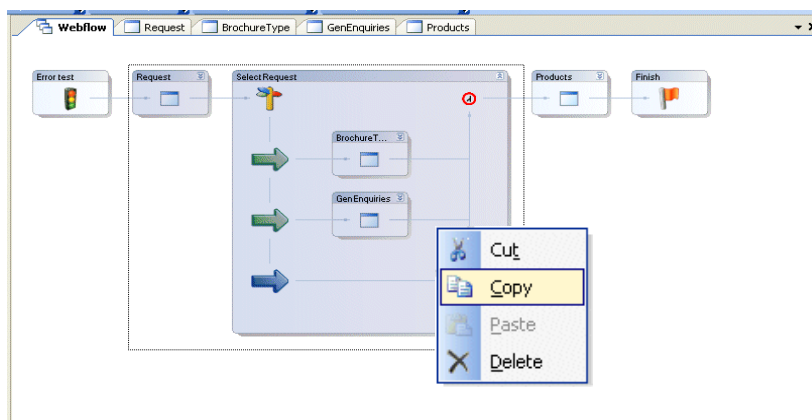
The dialog shows the 'Loop Conditions' section of the 'Webflow Launcher Section Wizard'. The left sidebar has 'Loop Conditions' selected. The main area has a title bar 'Loop Conditions' and a subtitle 'Set looping conditions'. There are two radio buttons: 'Only once' and 'Loop...'. The 'Loop...' option is selected. Below it is a checkbox '...for (up to) the following number of times:' which is checked. Next to it is a text box containing '2' and a small 'fx' icon. Below that is a checkbox '...until the following condition is met:' which is unchecked. Next to it is a dropdown menu. At the bottom are buttons: '< Back', 'Next >', 'Finish', 'Cancel', and 'Help'.

COPYING WEB CONTROLS, SECTIONS & DECISIONS

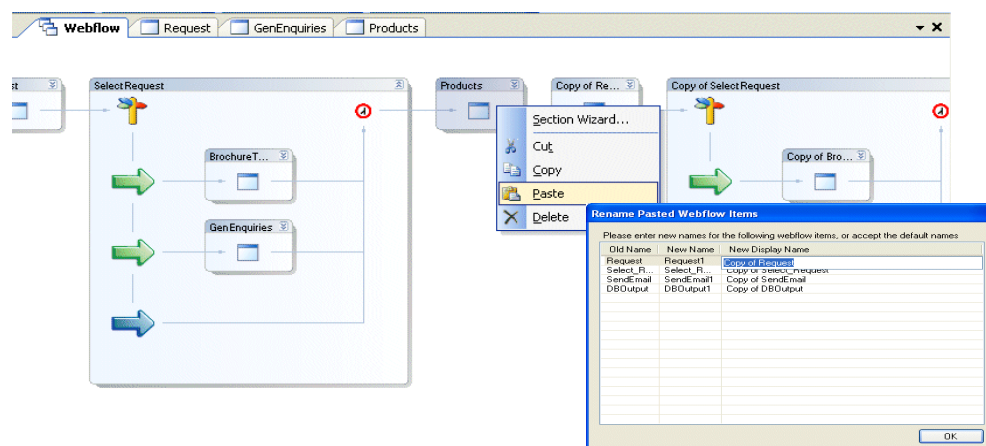
In the Synthesys Interaction studio you can cut, copy and paste web controls, sections, decisions and branches, to increase the efficiency of webflow design.

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

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



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



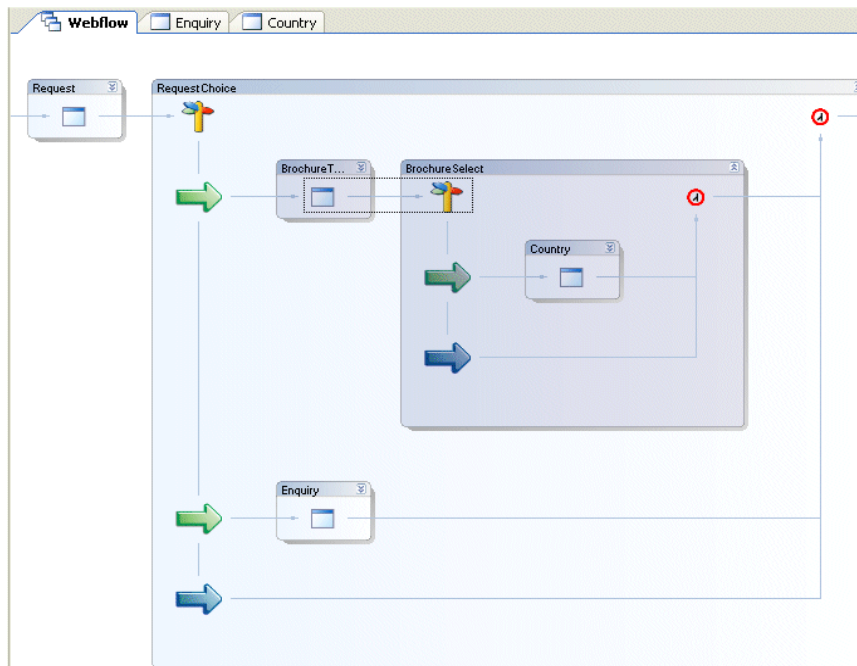
Rename the pasted sections and decisions in the **Rename Pasted Webflow Items** grid, entering the required names into the **New Name** and **New Display Name** fields.

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

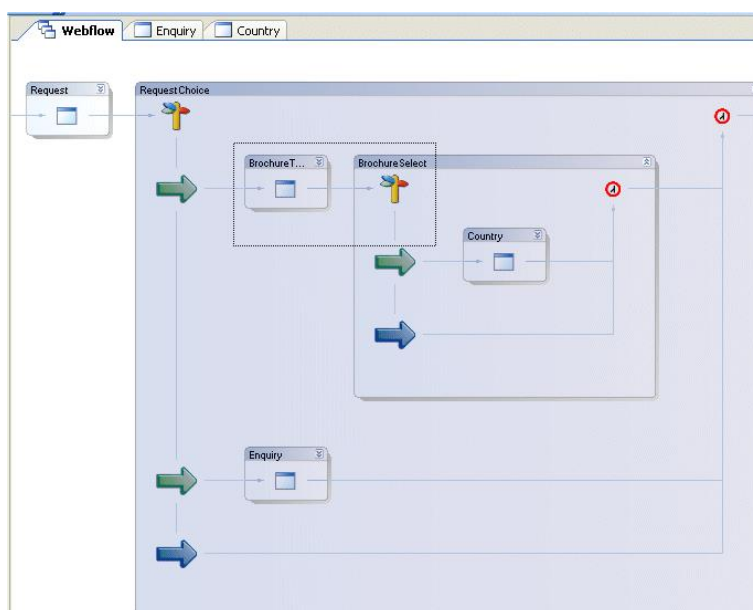
Copying Decisions within Decisions

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

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



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



Copying between Webflows

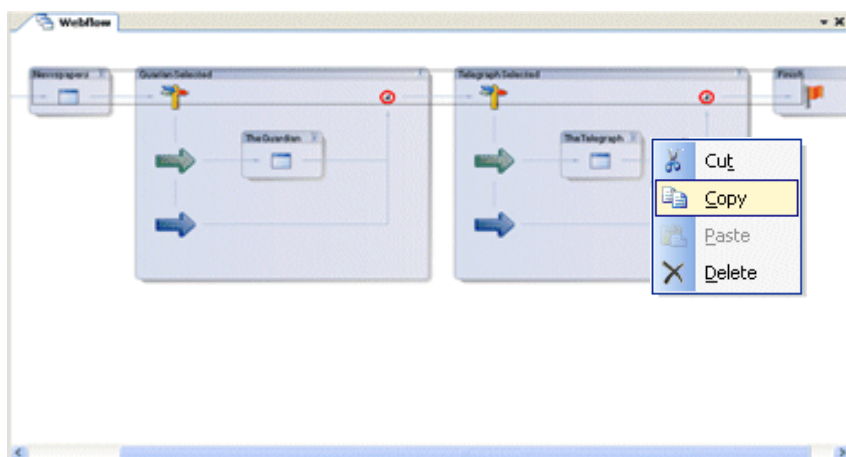
As well as copying and pasting sections and decisions within a webflow, users can copy and paste part of or even whole webflows from one campaign to another.



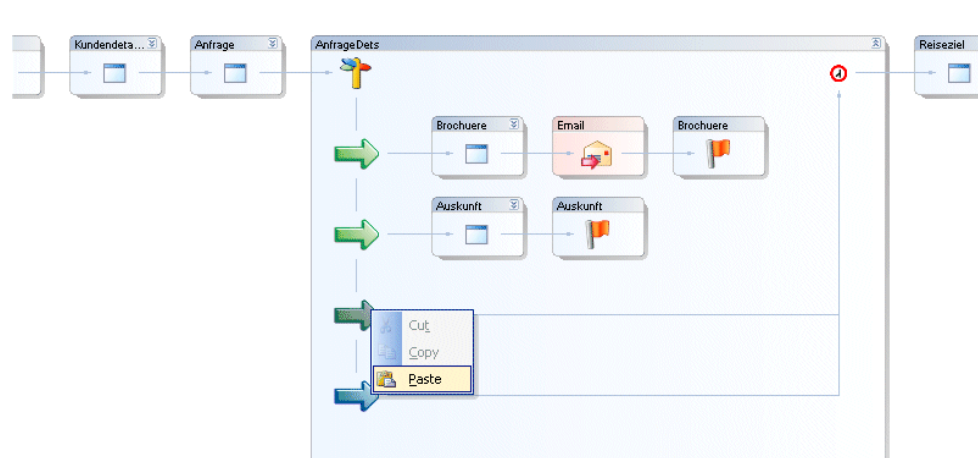
When copying and pasting between two campaigns, two instances of the Synthesys Interaction Studio can be opened on the PC, one for accessing the webflow with the information to be copied, the other for opening the target webflow into which the selection is to be pasted.

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

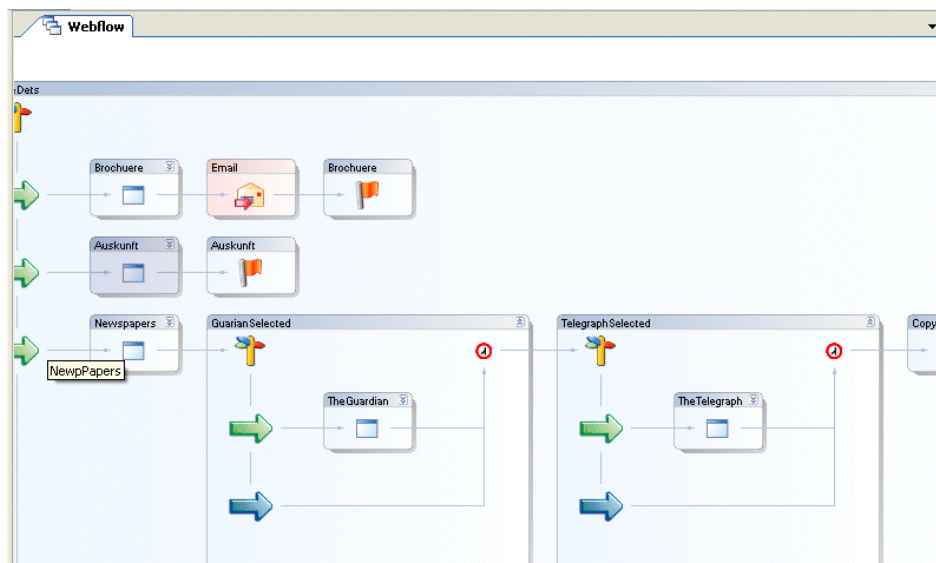
Right click on the selection and select *Copy* from the drop down list.



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



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



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

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



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

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

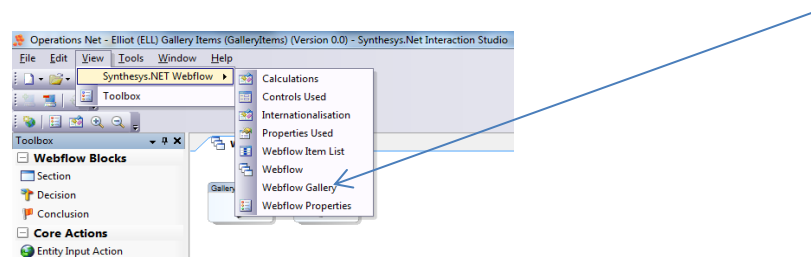
WEBFLOW GALLERY

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

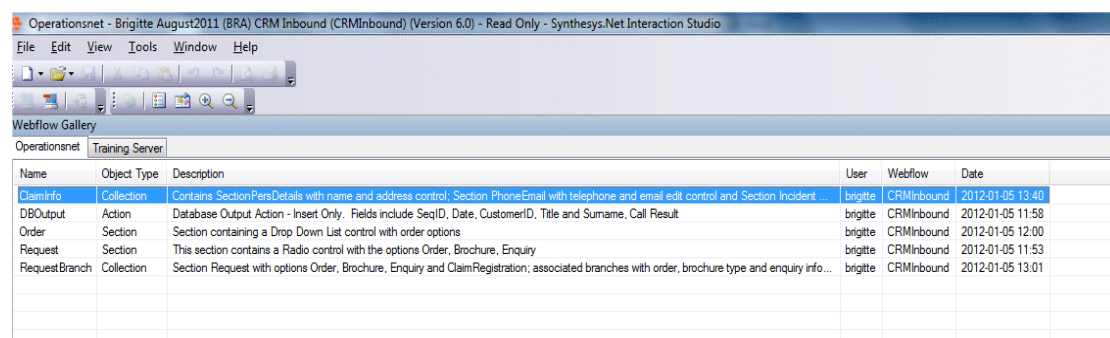
Accessing the Webflow Gallery

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

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



This will enable the **Webflow Gallery view**.



The screenshot shows the 'Webflow Gallery' view in the Synthesys.Net Interaction Studio. It displays a table with the following data:

Name	Object Type	Description	User	Webflow	Date
ClaimInfo	Collection	Contains SectionPersDetails with name and address control; Section PhoneEmail with telephone and email edit control and Section Incident	brigitte	CRMInbound	2012-01-05 13:40
DBOutput	Action	Database Output Action - Insert Only. Fields include SeqID, Date, CustomerID, Title and Surname, Call Result	brigitte	CRMInbound	2012-01-05 11:58
Order	Section	Section containing a Drop Down List control with order options	brigitte	CRMInbound	2012-01-05 12:00
Request	Section	This section contains a Radio control with the options Order, Brochure, Enquiry	brigitte	CRMInbound	2012-01-05 11:53
RequestBranch	Collection	Section Request with options Order, Brochure, Enquiry and ClaimRegistration; associated branches with order, brochure type and enquiry info...	brigitte	CRMInbound	2012-01-05 13:01

The data held in the gallery includes:

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

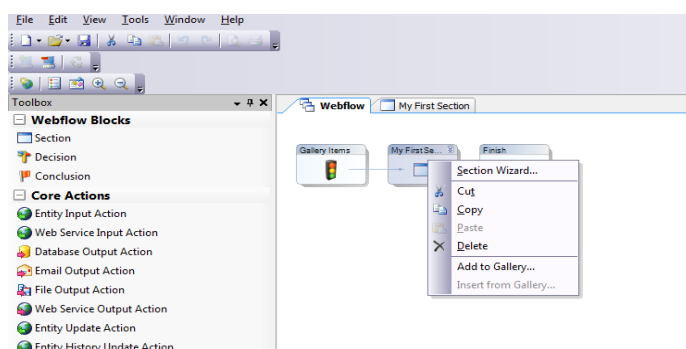
Adding Items to the Webflow Gallery

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

Adding an individual Item

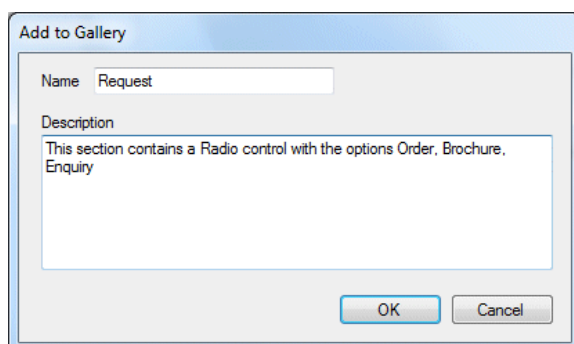
To add an individual item, i.e. a section, a decision or an action to the gallery

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



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

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



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

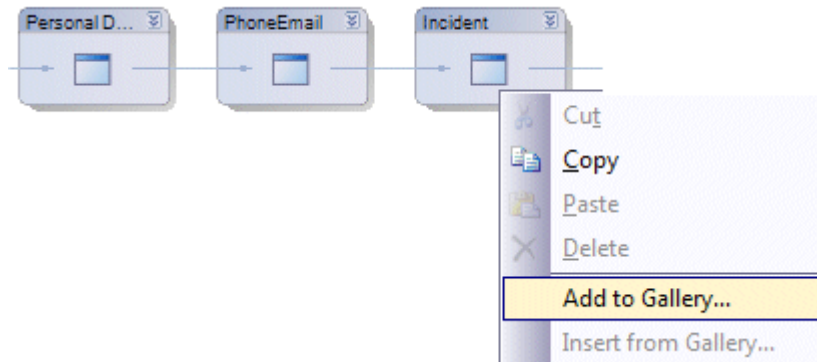
Press **OK** to commit this item to the gallery, or **Cancel** to close the dialog without saving the changes.

Adding Multiple Items

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

Select all items that you wish to add to the gallery.

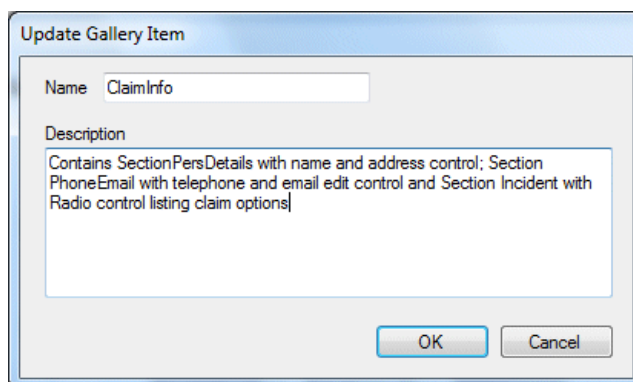
Right click on the items and select **Add to Gallery** from the drop down menu.



In the **Add to Gallery** dialog now displayed:

Add a name for the items selected.

Enter a logical description to identify the items to be saved.



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



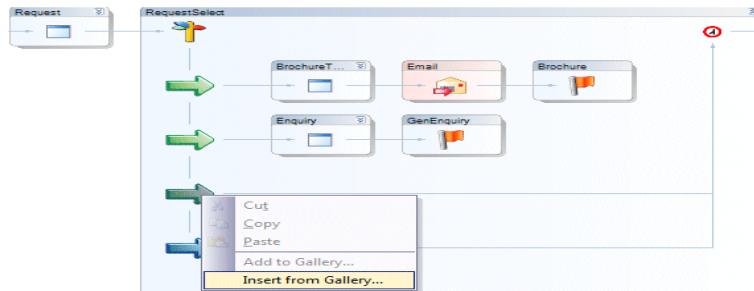
Ensure that the description tells the user all they need to know about the gallery item to make it as easy as possible to later identify and reuse it.

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

Using Items from the Webflow Gallery

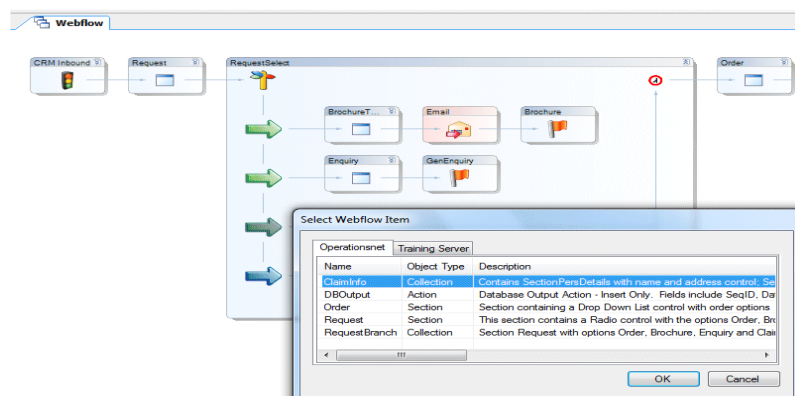
To pick up and reuse an existing gallery item in a webflow

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



In the **Select Webflow Item** dialog now displayed:

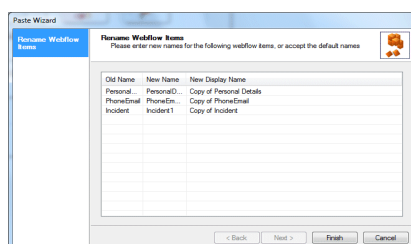
Select the item you wish to add from the list displayed and press OK.



Renaming Items

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

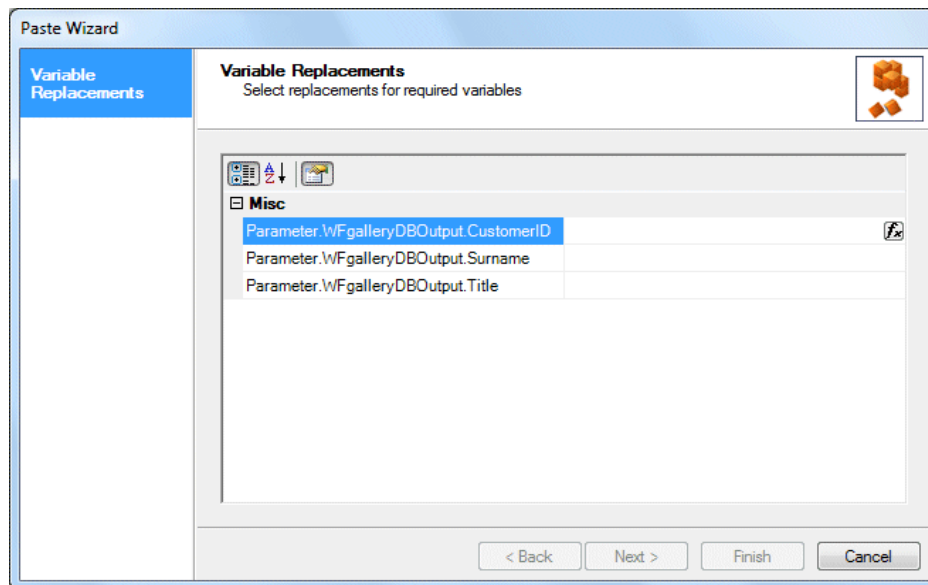
Enter the new name(s) into the **New Name** and **New Display Name** fields.




Updating Variables

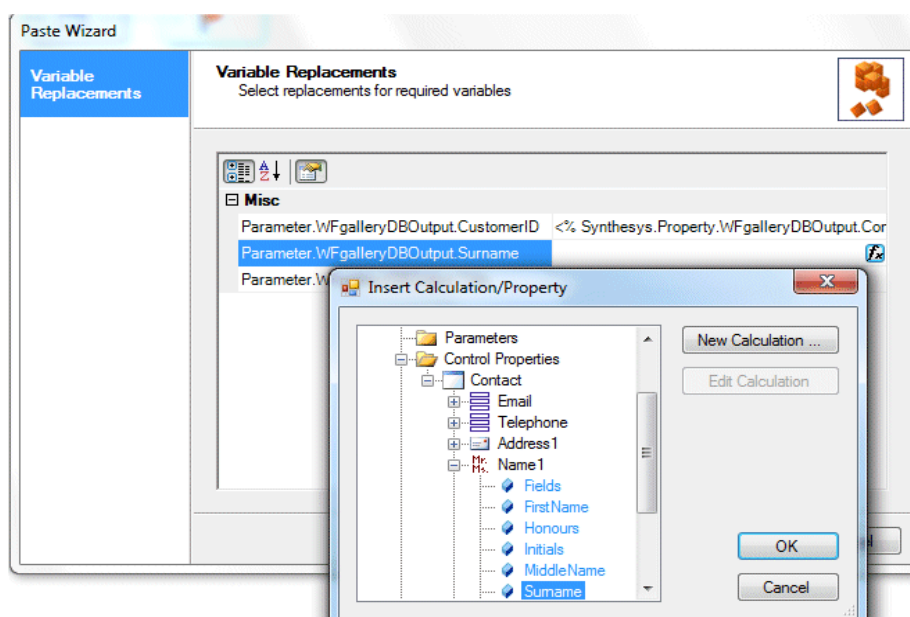
If the item that is inserted from the webflow gallery requires data that is not contained in the gallery item, i.e. when picking up an Database Output action or a section containing a calculation, then

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



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

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



Editing a Gallery Item

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

In the *Synthesys.Net Interaction Studio*

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

Right click on the gallery item and select either Rename or Delete, as required.

Webflow Gallery						
Operationsnet		Training Server				
Name	Object Type	Description	User	Webflow	Date	
ClaimInfo	Collection	Contains SectionPersDetails with name and address control, Section PhoneEmail with telephone and email control and Section Incident ...	brigitte	CRMinbound	2012-01-05 13:40	
DBOutput	Action	Database Output Action - Insert Only. Fields include SeqID, Date, CustomerID, Title and	brigitte	CRMinbound	2012-01-05 11:58	
Order	Section	Section containing a Drop Down List control with order options	brigitte	CRMinbound	2012-01-05 12:00	
Request	Section	This section contains a Radio control with the options Order, Brochure, Enquiry	brigitte	CRMinbound	2012-01-05 11:53	
RequestBranch	Collection	Section Request with options Order, Brochure, Enquiry and ClaimRegistration; associated	brigitte	CRMinbound	2012-01-05 13:01	

Multiple Server Connectivity

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

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

Webflow Gallery						
Operationsnet		Training Server				
Name	Object Type	Description	User	Webflow	Date	
ClaimInfo	Collection	Contains SectionPersDetails with name and address control, Section PhoneEmail with telephone and email control and Section Incident ...	brigitte	CRMinbound	2012-01-05 13:40	
DBOutput	Action	Database Output Action - Insert Only. Fields include SeqID, Date, CustomerID, Title and	brigitte	CRMinbound	2012-01-05 11:58	
Order	Section	Section containing a Drop Down List control with order options	brigitte	CRMinbound	2012-01-05 12:00	
Request	Section	This section contains a Radio control with the options Order, Brochure, Enquiry	brigitte	CRMinbound	2012-01-05 11:53	
RequestBranch	Collection	Section Request with options Order, Brochure, Enquiry and ClaimRegistration; associated	brigitte	CRMinbound	2012-01-05 13:01	

If you have multi server connectivity, you can copy gallery items from one environment to another.

Simply right click on the item to copy and select **Copy To → ServerName**.

SAVE AS OPTION

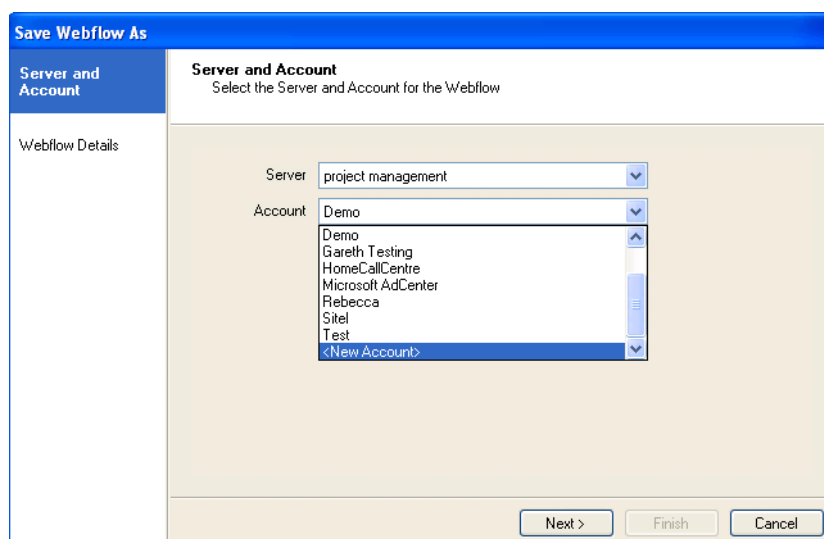
Using the **Save As** option, existing Webflows can be saved to another server under a new or existing account, or the option can be used to overwrite existing Webflows.

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

Selecting the Server and Account for the Webflow

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

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



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

3. To replace an existing Webflow, select the name of the Webflow that you wish to overwrite and then click *Finish*.
4. To create a new Webflow, select <New Webflow> and enter a name for the new Webflow and then click *Finish*.




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

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

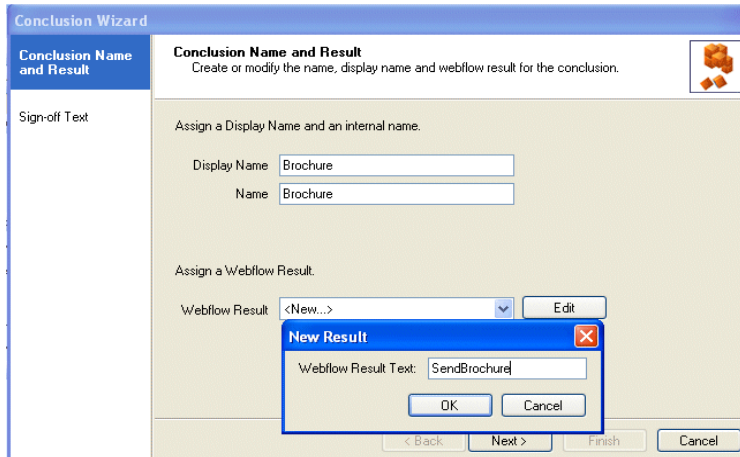
ADDING CONCLUSIONS

A conclusion is the last section in the web flow.

To create a conclusion, drag the conclusion flag  from the *Webflow Blocks* toolbar and drop it into the Webflow.

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

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



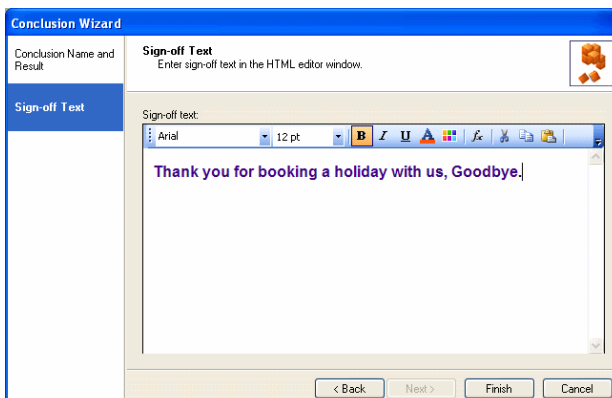
The screenshot shows the 'Conclusion Wizard' window, specifically the 'Conclusion Name and Result' step. The left sidebar has 'Conclusion Name and Result' selected. The main area contains two sections: 'Assign a Display Name and an internal name.' with input fields for 'Display Name' (containing 'Brochure') and 'Name' (containing 'Brochure'); and 'Assign a Webflow Result.' with a dropdown menu showing '<New...>' and an 'Edit' button. A 'New Result' dialog box is open in the foreground, showing a 'Webflow Result Text' field with the value 'SendBrochure' and 'OK' and 'Cancel' buttons. At the bottom of the wizard are '< Back', 'Next >', 'Finish', and 'Cancel' buttons.

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

Sign off Text

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

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



The screenshot shows the 'Conclusion Wizard' window, specifically the 'Sign-off Text' step. The left sidebar has 'Sign-off Text' selected. The main area contains a text editor with the title 'Sign-off text:' and a toolbar with various formatting options. The text area contains the text 'Thank you for booking a holiday with us, Goodbye.' At the bottom of the wizard are '< Back', 'Next >', 'Finish', and 'Cancel' buttons.

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

EDITING LIVE WEBFLOWS IN TEST ENVIRONMENT

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



'To ensure that you work with the latest version of the respective webflows, both the test webflow and the live webflow need to be checked out by you on your local machine first

1. Connect to Test server
2. Check out webflow ABC 'for update'
3. Close the webflow
4. Disconnect from Test server
5. Connect to the Live server
6. Check out webflow ABC to be updated
7. Use '**Save As**' to move the live webflow into the test webflow

(**File – Save As.** In the '**Open Webflow**' dialog select the **Test Server** – Account & Webflow to be updated, to replace the test webflow with the current live webflow).

8. Disconnect from Live server
9. Connect to the Test server
10. Edit – Save & Publish the edited webflow
11. Test changes made in the Web Browser / Synthesys Portal

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

12. Use 'Save As' to move the test webflow into the live webflow

(**File – Save As.** In the '**Open Webflow**' dialog, this time, select the **Live Server** – Account – Webflow, to replace the current live webflow with the updated test webflow)

13. Disconnect from Test server
14. Connect to the Live server
15. Save & Publish the webflow

Webflow Property Options

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

WEBFLOW PROPERTY OPTIONS

Properties – adding CRM parameters

CRM parameters are created in the *Properties* section of a Webflow in the Synthesys Interaction Studio, to enable branching and calculations on selected CRM information and to display CRM details in the *Dashboard* of the webflow.

For information about creating CRM parameters, please see the next page of this document.

The CRM (Customer Relationship Management) module is designed to manage customer data, allowing access to customer profiles and customer histories, providing agents with the best possible help to deal with customers' requests.

When using Synthesys together with the Synthesys Dialler Platform, the CRM table is created in the Outbound Setup wizard of the Synthesys Dialler Platform. Customer data is then imported into the CRM and queued using the *Selected Queuing Import wizard* in the Outbound Manager of the Synthesys Dialler Platform.

For information about designing a CRM table, importing customer data and creating Outbound campaigns and call lists, please use the document: *Synthesys Dialler Platform*.

Dashboard and Parked & Held Information

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

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

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

Creating Style Templates

Style templates are configured in the **Webflow Properties** section of a webflow, selecting the **Default Styles** page.

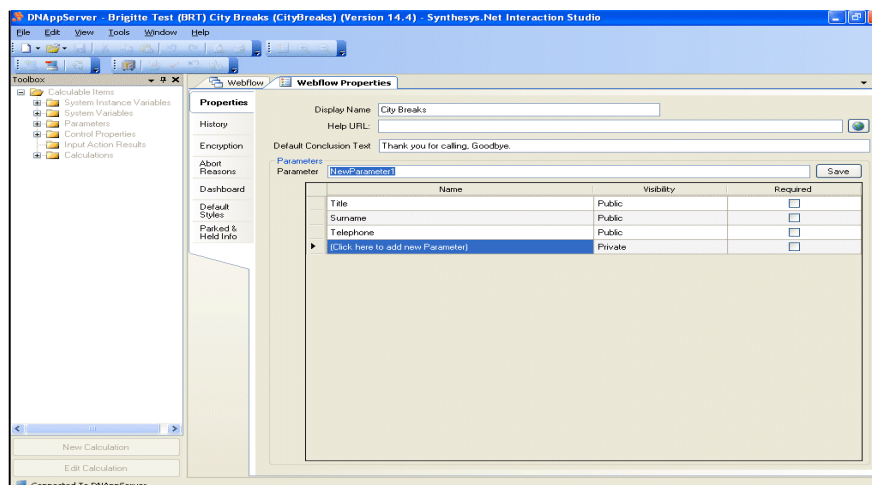
Users can set the colour and font style for input fields, control labels, buttons and borders of web controls, using drop down menu options and *Change* buttons.

Properties - Creating CRM Parameters

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

Double click on the **Webflow Properties** section displaying a traffic light, to open the section and then select '*Properties*' to display the **Parameter** page.

- In the Parameter section, select the field '(Click here to add new Parameter)'.
- Next, move your cursor back up to the Parameter field and replace the option 'New Parameter1' with the name of the required parameter. The names entered into the Parameter field must exactly match the names of the CRM fields to be used.
- Click the Save button to move the parameter name entered into the list of parameters. If you wish to make a parameter field compulsory, tick the 'Required' option.
- Repeat the above steps to enter the next parameter.



The names entered into the Parameter field must exactly match the field names in the corresponding CRM table.

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

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

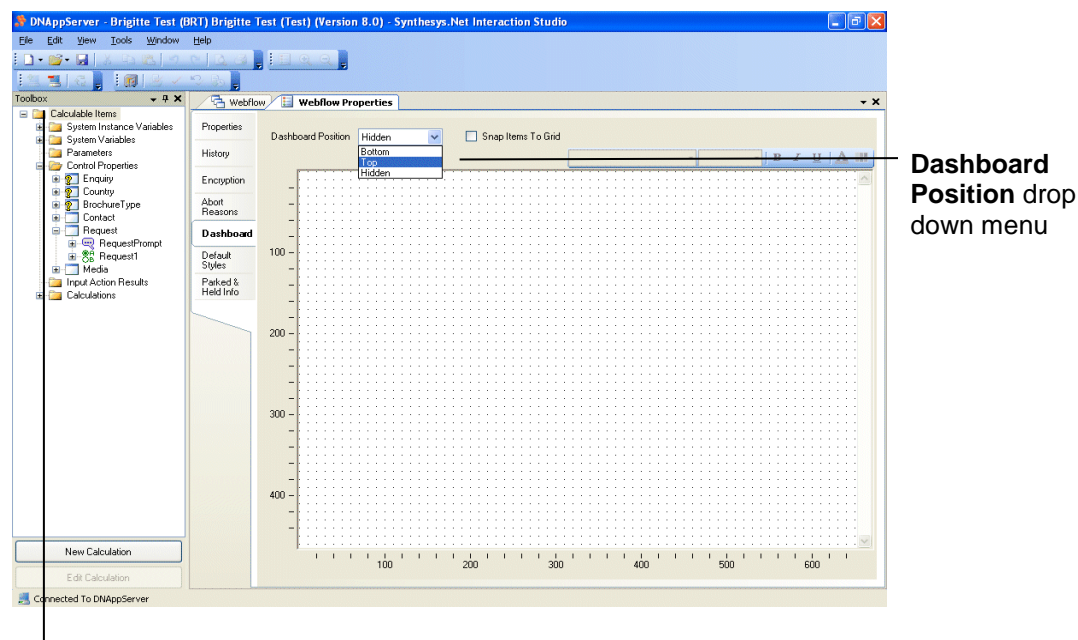
Dashboard Configuration

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

Introduction

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

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



Calculable Items Directory

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

Calculable Items Directory

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

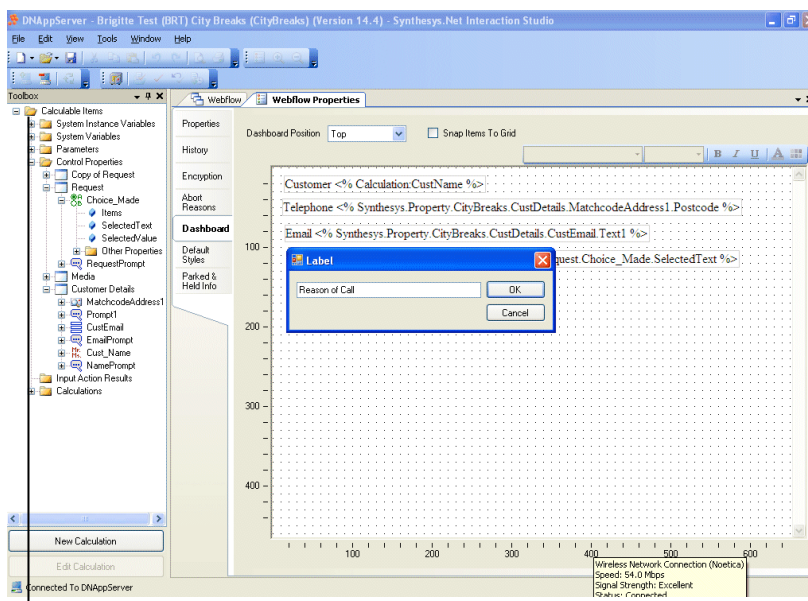
From the **System Instance Variables** folder, for example, you can select information about the Agent i.e. agent name and ID and information related to the Call, including Sequence ID, call duration and Webflow results. From the **System Variables** folder you can select the account name and prefix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

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

Configuring the Dashboard

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

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



Calculable Items Directory

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

Configuration of Parked & Held Info

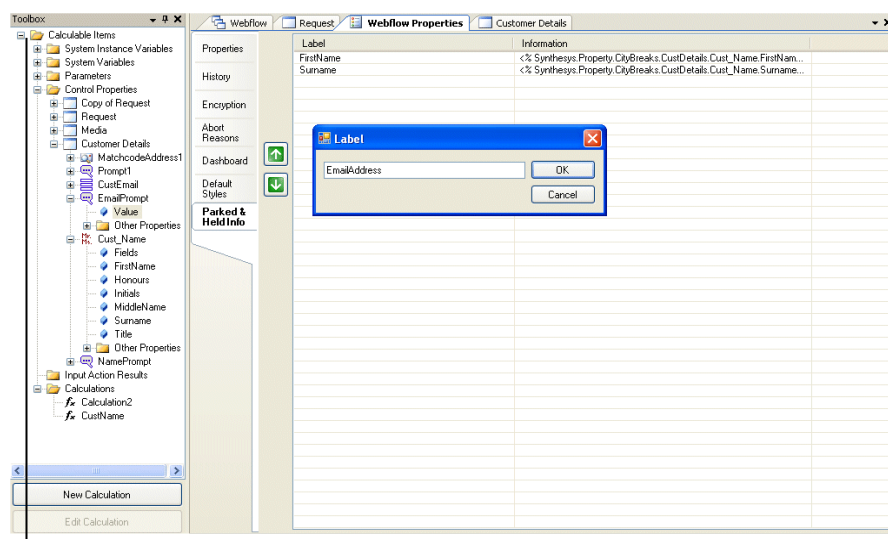
The *Parked & Held Info* option is used to display selected information from a webflow to the agents in the *Parked* or *Held* calls window in the Web Browser.

Configuring Parked & Held Info

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

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

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



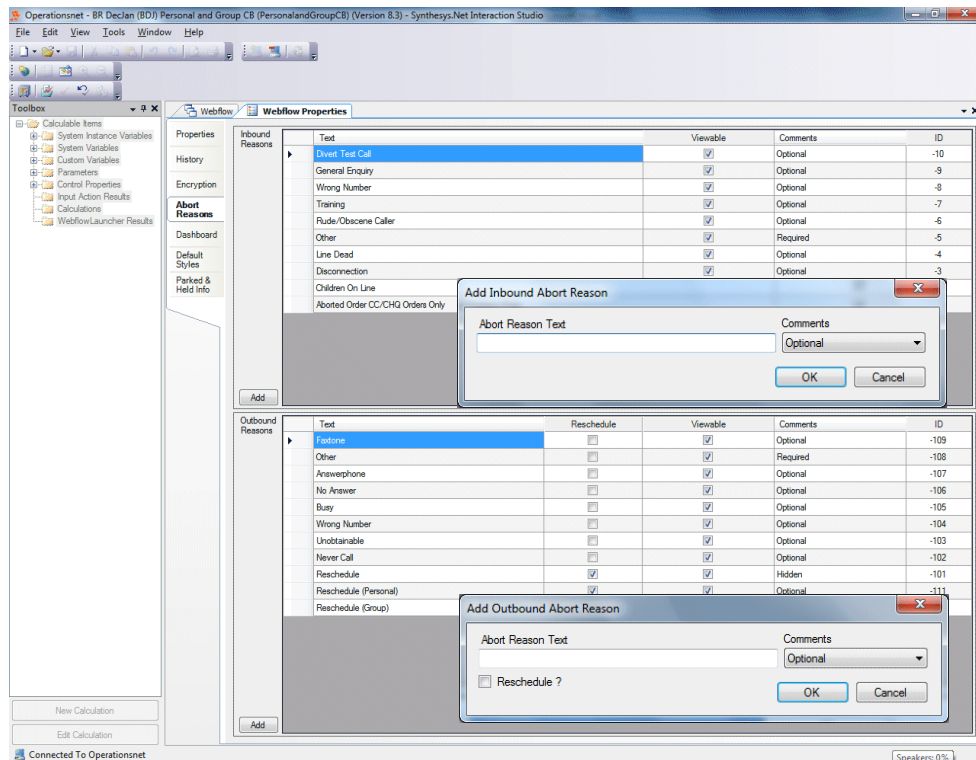
Calculable Items Directory

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

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

Abort Reasons

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



To add further Inbound and Outbound abort reasons, as required

- Open the Synthesys.Net Interaction Studio.
- Double click on the Webflow Properties section displaying a traffic light, to open the *Webflow Properties* page and go to **Abort Reasons**.
- Select **Inbound Reasons** and click **Add** to enter a new inbound abort option.
- Select **Outbound Reasons** and click **Add** to enter a new outbound abort option.
- Place a tick into the **Visibility** column, to display the option entered to the agents in the Synthesys.Net Portal at run time in the Web Browser.



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

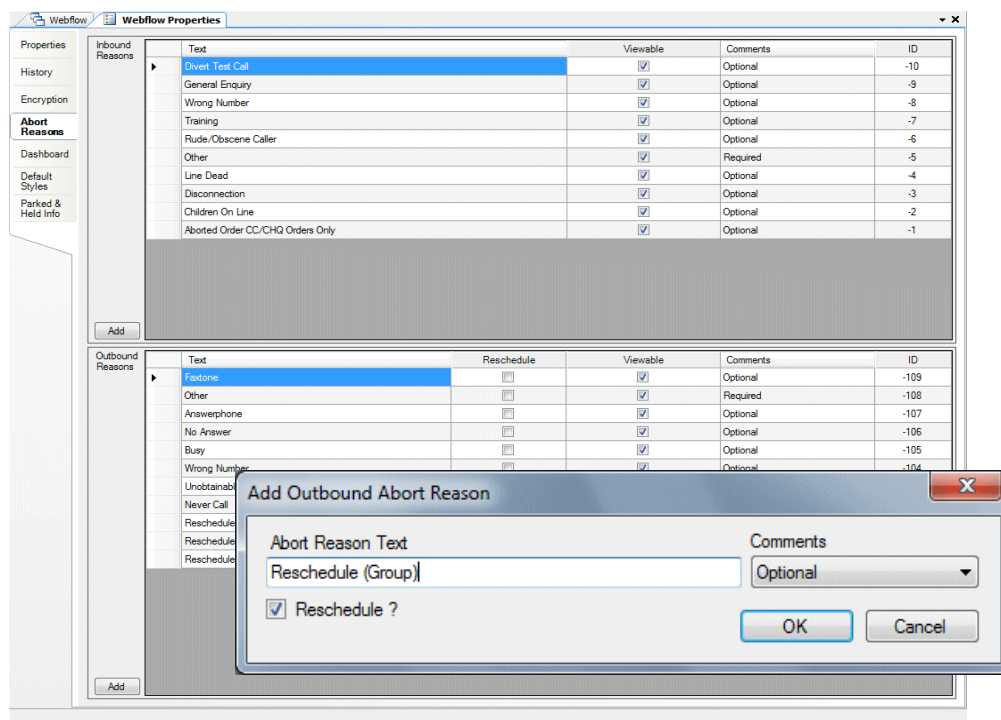
Reschedule Personal and Group Callbacks

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

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

To add Personal and Group call backs

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



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

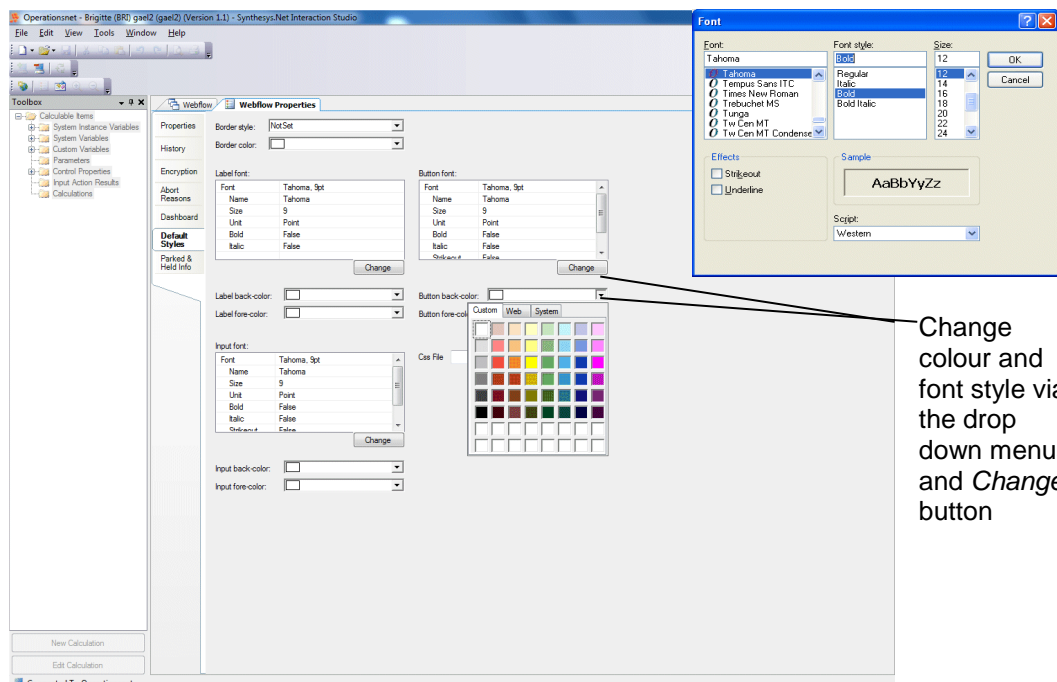
Selecting **Reschedule (Group)** will always reschedule the current call to **None**, i.e. without assigning an Agent ID, regardless of whether or not Operator Bias is enabled. When P is used as part of reschedule flags, the call will be slept, no agent assigned.

Creating Style Templates

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

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

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



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



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


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

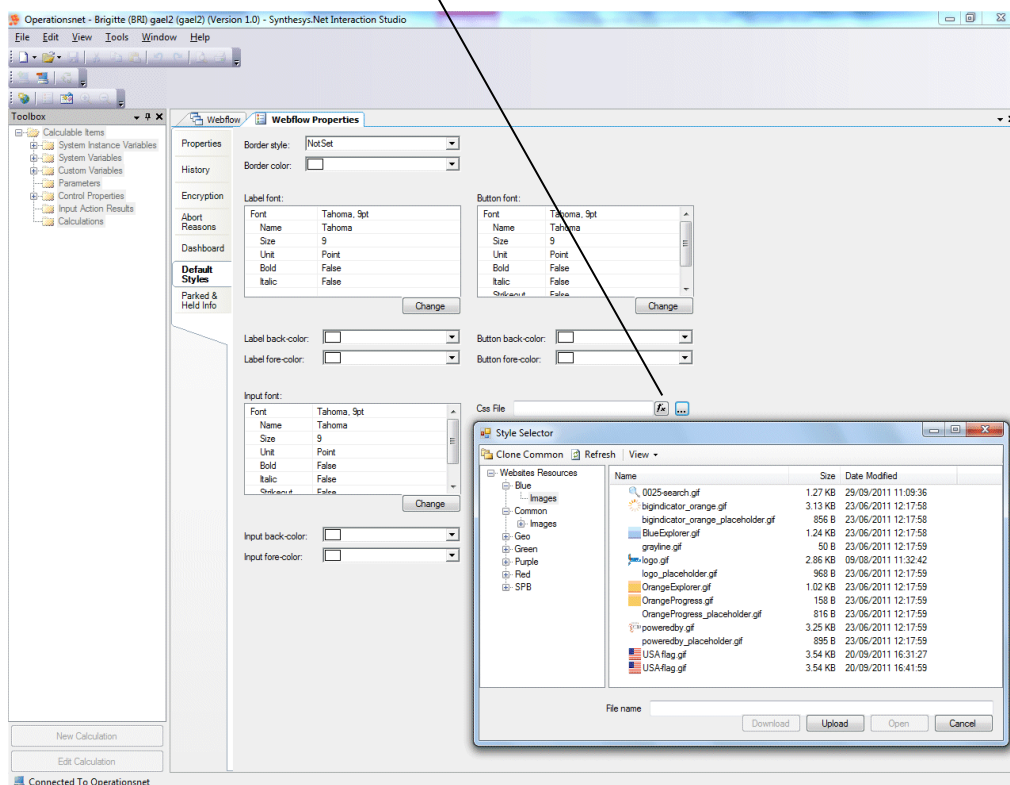
Using Cascading Style Sheets (CSS)

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

Creating a new CSS file

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

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

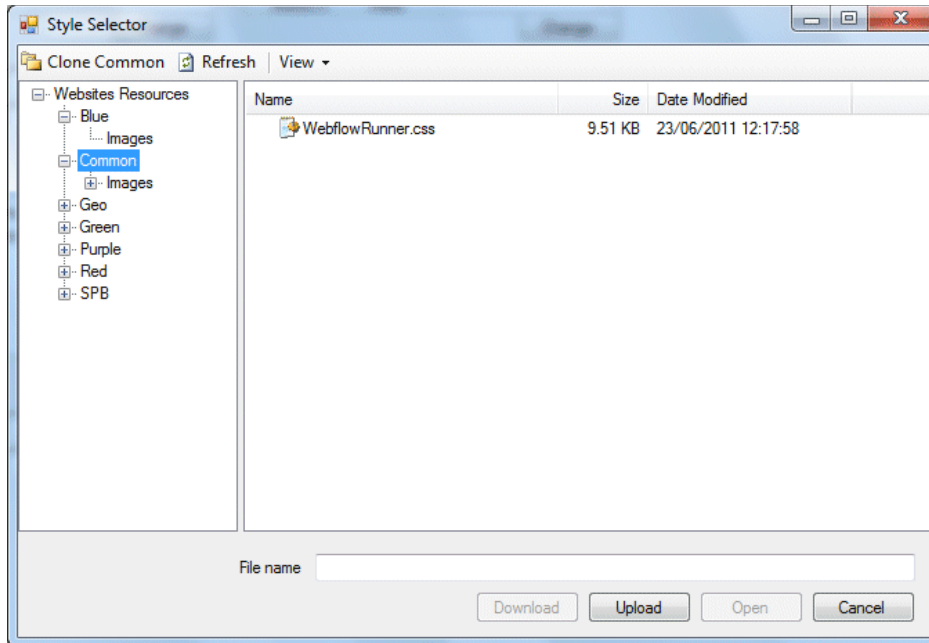


The **Style Selector** dialog displays the list of available CSS and image collections on the system.

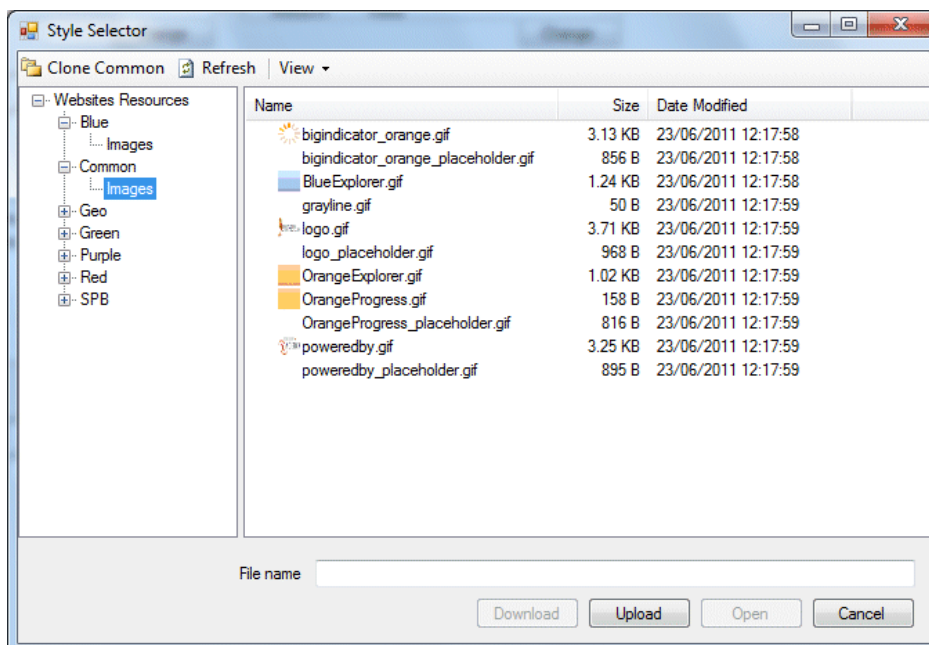
Please see next page for more information.

The Style Selector

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



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

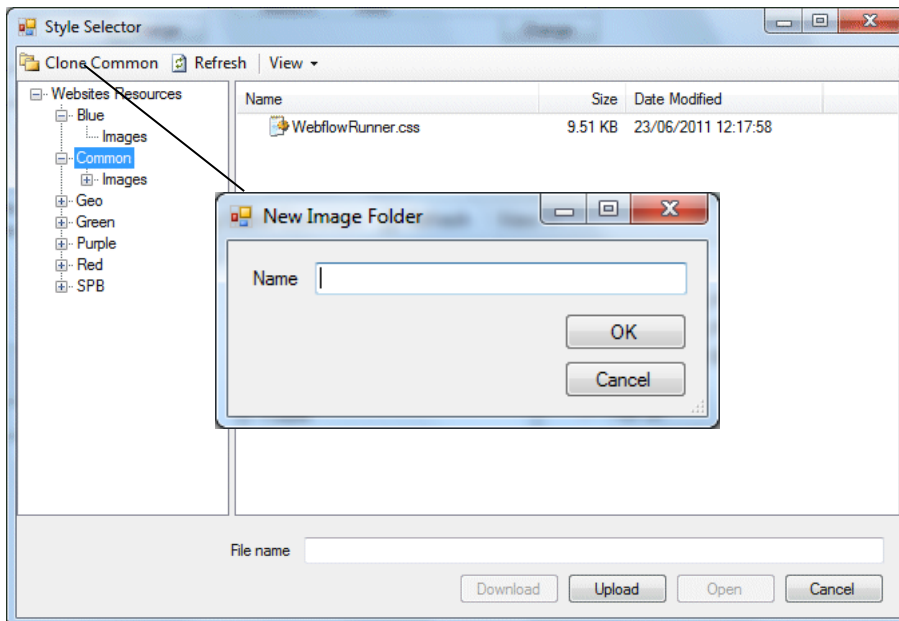


The next section will describe how you can create a new image folder and how to edit files.

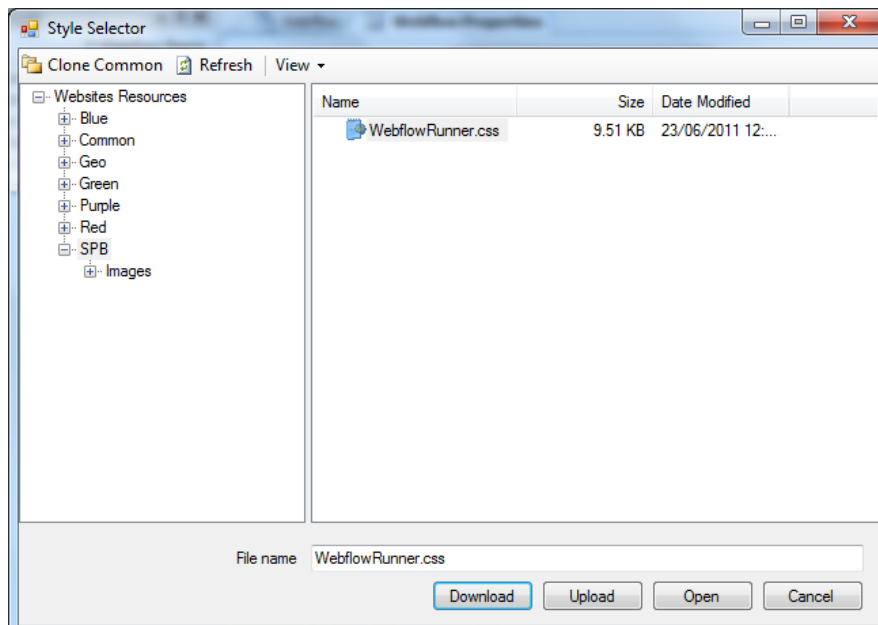
Creating a new Folder

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

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



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

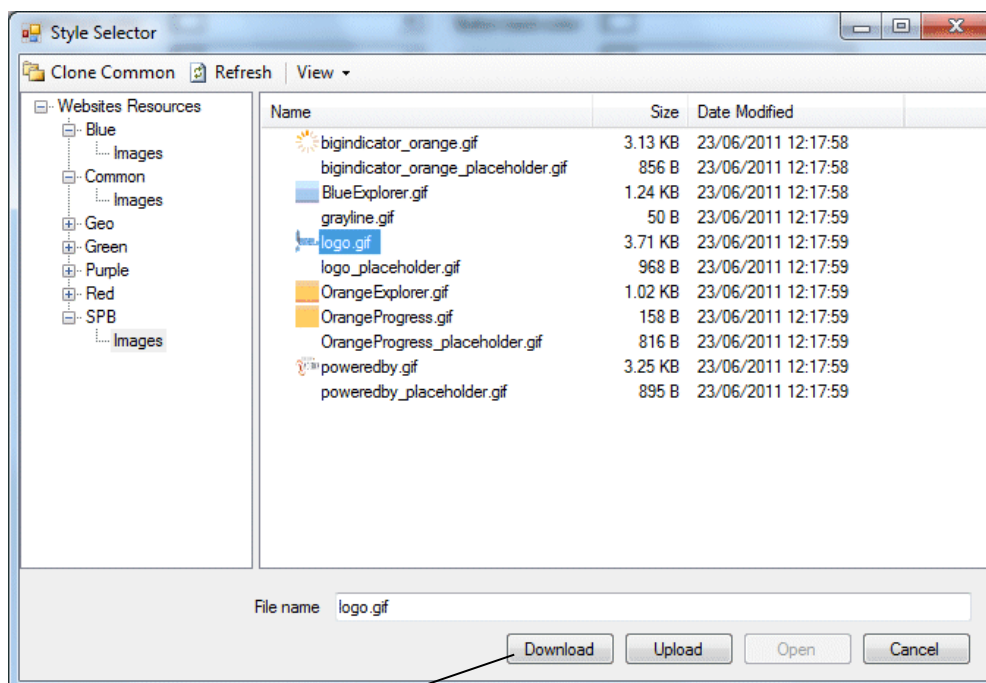


The system has automatically copied all files from common to your new folder and you can now start to edit the css file or any of the images.

Editing existing files

In the **Style Selector** dialog

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



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

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

Contents of WebflowRunner.css

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


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

PUBLISHING WEBFLOWS

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

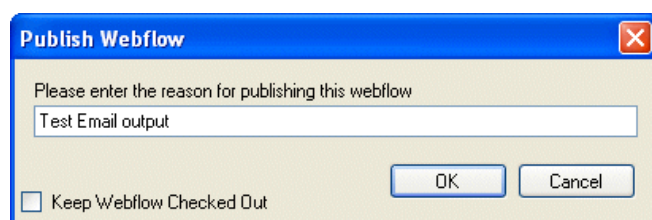


To publish a Webflow, you need to be connected to the server and you must have the Webflow checked out.

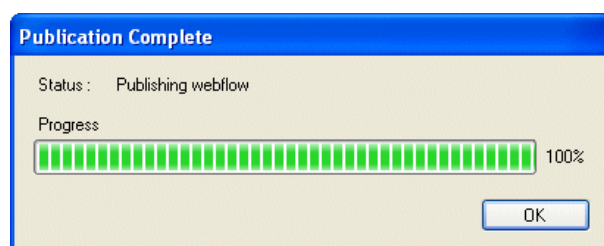
Go to **File – Publish** or use the Publish  icon to open the Publish Webflow dialog.

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

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



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



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

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

WEBFLOW VERSIONS

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



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

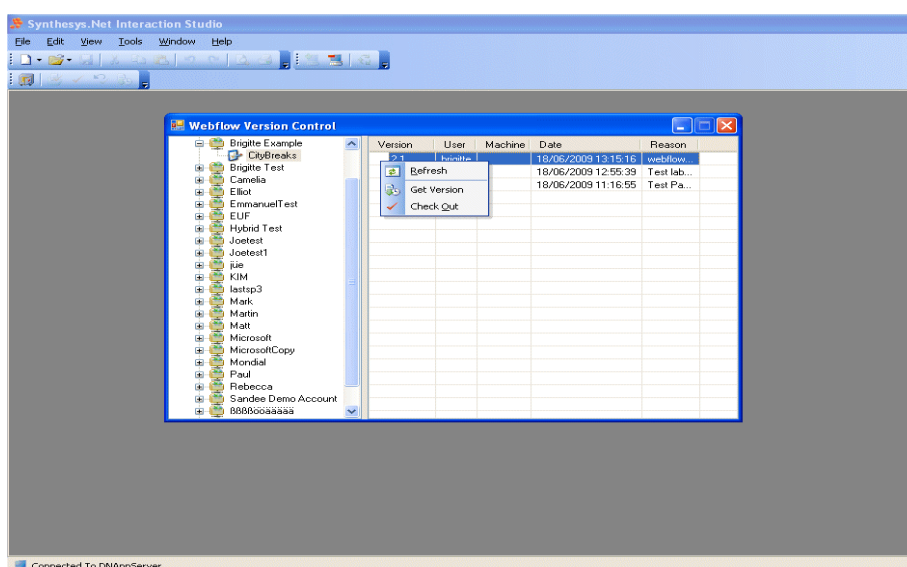
When publishing a Webflow, the version number will go up to the next full number, from Version 1.3 to Version 2.0 or from Version 2.1 to Version 3.0

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

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

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

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



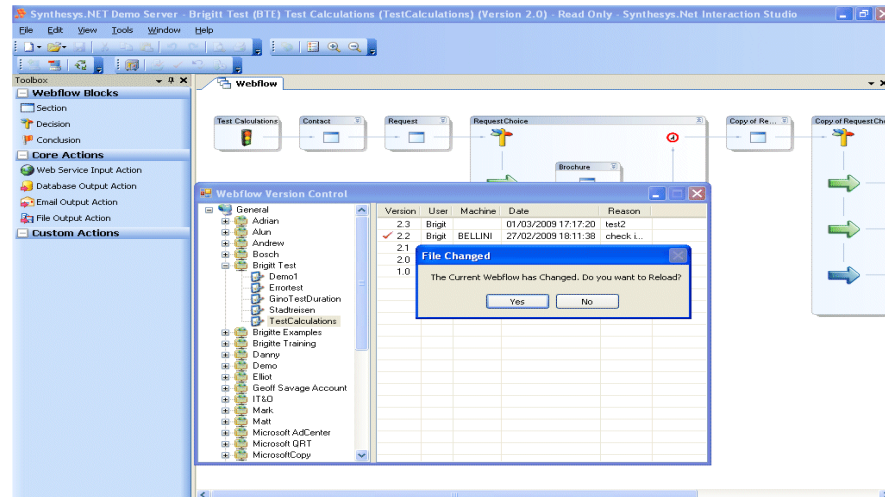
Selecting the webflow version that you wish to view or edit will not automatically open the webflow.

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

Checking out a previous Webflow Version

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

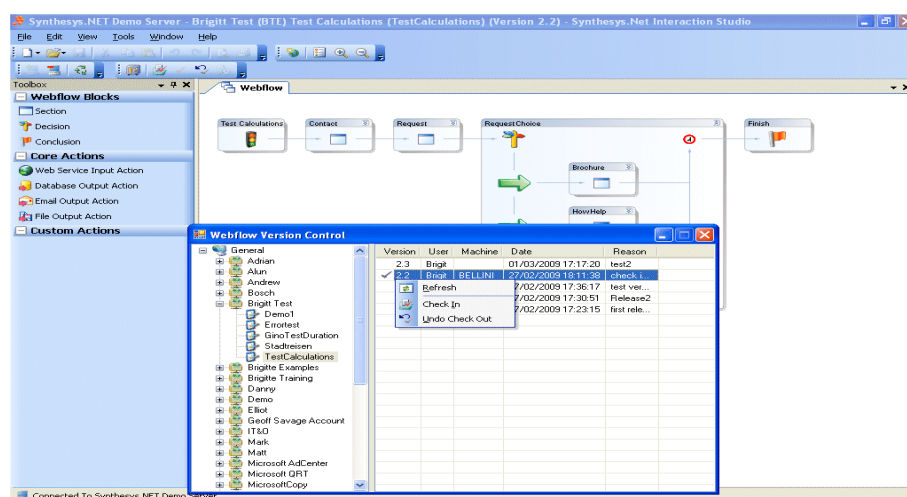
Click **Yes** to the message: 'The Current Webflow has Changed. Do you want to Reload?'



The selected version of the webflow will open.

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

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



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