

# Synthesys Call Recycling



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# SYNTHESYS CALL RECYCLING

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## Introduction

Using Synthesys *Scripted Call Recycling* simple and complex recycling rules can be created utilizing a graphical script, built much like a Synthesys Callflow.

Decisions to enable branching and a range of icons can be dropped anywhere in a *Recycling script*, determining the type of action to be taken on a call. Every recycling rule ends up in a conclusion, specifying what should happen next to the call.

Each Outbound list has a default Recycling script attached, which will serve as a useful starter to help customers generate their own scripts.

#### Launching the Call Recycler

To launch the Synthesys Call Recycling Designer, right click on your outbound list and select **Set Recycling Rules** from the drop down menu.

#### Active Times

The only available Time Periods that can be selected in the Time Period window of the Recycling Designer are those that have been set to 'Active' in the 'Active Times' window when setting up your outbound list.

#### Multiple Telephone Numbers

When queuing customers, ensure that the telephone number that you select as the first number for contacting a customer, is the same, as the number on which you want to start off your recycling rules.

Synthesys Scripted Call Recycling is not a standard feature but has to be purchased separately.



# THE RECYCLING DESIGNER

The Synthesys Call Recycling Designer is launched from the Outbound Manager.

- Open the **Outbound** Manager.
- Locate and right click on the relevant outbound list and select **Set** *Recycling Rules* from the drop down menu.

The Synthesys Call Recycling Designer has a default recycling script attached.

Users can edit the recycling rules of the default flow to meet particular requirements or design a totally new recycling script.



Design Area

**Recycling Toolbar** 

The following sections describe each of the elements indicated above.



## The Menu Bar

The *Menu Bar* at the top of the *Recycling Designer Screen* provides access to a series of menu options via four pull down menus.

#### File Pull Down Menu

Menu Option	Used To
New	Create a new Recycling Script
Save	Save and Release the Recycling Rules
Copy Script	Copy the currently opened Recycling script to a destination Outbound List
Exit	Close the Recycling Designer and return to the Outbound Manager Screen.

#### View Pull Down Menu

Menu Option	Used To
Toolbar	Hide or display the Toolbar. A tick next to this option indicates
	that the Toolbar is currently visible.
Status Bar	Hide or display the <i>Status Bar</i> . A tick next to this option indicates that the <i>Status Bar</i> is currently visible.

#### Time Period Pull Down Menu

Menu Option	Used To
Edit	Open the <i>Time Period</i> window to add, edit or delete time periods.

#### Help Pull Down Menu

Menu Option	Used To
About Recycling Designer	Display version details of the Synthesys Call Recycling Designer you are running.



## THE TOOLBARS

The Synthesys Call Recycling Designer has two toolbars.

The Standard Toolbar The Recycling Toolbar

When you first access the *Synthesys Call Recycling Designer*, the *Standard Toolbar* is positioned directly below the *Menu Bar* and the *Recycling Toolbar* is positioned on top of the *Design Area*.

The toolbars can be placed anywhere in the Synthesys Call Recycling Designer. They can be positioned at the top, bottom, or to the left or right of the Design Area. Alternatively, they can be placed on top of the Design Area as a floating toolbar.

## The Standard Toolbar

The Standard Toolbar is positioned directly below the Menu Bar on the Recycling Designer Screen:



Option	Used To
D	Start a new Recycling Script.
	Save and Release the currently displayed Recycling Script.
<b>8</b>	Display information about the version of the Recycling Designer.



# The Recycling Toolbar

The Recycling Toolbar lets you build recycling rules quickly and easily.

<b>&gt;</b>	3 3 🚯 🐼 🗵 💱 🥪 Q Q 🕎 🖏 🖓 🕕 ?
2	Activate the selection tool.
7	Change the Telephone Number to call.
3.	<b>Tie to Agent</b> , to ensure that the agent who took this call will get the call when it is recycled.
3	Untie from Agent, to allow any agent to take this call when it is recycled.
1	Add a New Decision to enable Branching on different criteria and events.
⚠	Change state to <b>Attention</b> .
<b>.</b>	Change state to <b>Unobtainable</b> .
•	Sleep the call, for example, sleep a 'busy' call for ten minutes'
Q	Queue the call to this campaign, with the number of times called remaining unchanged.
Q	<b>Re-queue to this campaign</b> but set the original call to <i>Finish</i> and queue as a new call, with the number of times called being set to zero (0).
4	<b>Change Campaign</b> will queue the call to a new campaign and marks the call as <i>Finish</i> in the original campaign.
	<b>Change Campaign and Sleep</b> will queue the call as a sleeping call to a new campaign and marks the call as <i>Finish</i> in the original campaign.
9	<b>Retime</b> (sleep) the call for a particular time band, as set in the Time Period Menu. The time band requires the call to have been dialled either by the PD or manually in Take Calls pressing the Dial button, unless 'Auto dial' is ticked in the Outbound Manager.
0	Never Call, shows a list of all clients that do not wish to be contacted again.
?	Wrong Number, refers to an incorrect number associated with a client to be called.
4	Change state to <b>Strategy Complete</b> . Thus the call is not processed through any other recycling rule and is marked as 'Finished'.



# DEFAULT RECYCLING RULES



When opening the *Synthesys Call Recycling* window, the default recycling script is displayed.

The recycling rules of the default recycling script are explained in the next section.



# **Decisions and Branches in the Default Script**

#### **Result Decisions 1& 2**

If a call is aborted, we have assigned specific outcomes into our Default script.

Aborted Type	Outcome
Never Call Unobtainable & Faxtone Wrong & Invalid Number Missed latest time period	<ul> <li>Never Call</li> <li>Unobtainable</li> <li>Wrong Number</li> <li>Unotic from egent, then Sleep for 1min</li> </ul>
Other	Attention
No Answer	Sleep for 30min Sleep for 4hours
Answerphone Nuisance Call	Sleep for 24hours Sleep for 3 days

The branches that we have created reflect these call outcomes and contain the appropriate 'if....' condition.



Result Branch 1

For each of the required Outcomes we then have placed the relevant Conclusion icon at the end of the branch.



#### Times Called Decision and Branch

Calls in our default script will go to *Strategy Complete*, if a number has been dialled five times or more, without reaching the customer.

We have picked up a *New Decision* <sup>(1)</sup> and placed it after the traffic lights, to display the 'Select the value...' window.

From the options available, we have selected *Total number of times called*, then clicked OK.

SYNTHESYS	cling
Times Called	Miscellaneous C Last call result C Time period of the last call Last number dialled Time since queued Time since first called Is tied to an agent CRM Data Priority

Double clicking on the Decision point opens the Define Branching window, where we have selected the *New Branch* button to create a New Branch, called '5+'.

Next, we clicked *Add Condition* and selected 'Greater Than or Equal to 5' from the respective lists.



We then dropped the *Strategy Complete k* icon at the end of the branch.



## DESIGNING A NEW RECYCLING SCRIPT

To design a new Recycling script, go to **File – New** on the Menu Bar.

Alternatively click the '**new page**' icon on the Standard toolbar to display a new Recycling Flow.



The Call Recycling Flow that we will design is based on the following Scenario:

- Calls aborted with 'Never Call', 'Number Unobtainable or Faxtone', 'Wrong Number' or 'Other' should go to the respective conclusion flags.
- Customers initially are to be called on their work number.
- If they can't be reached by the third call attempt, we phone their mobile number.
- If customers still have not been contacted after phoning their mobile number 3 times, we get the agents on the evening shift to call their home number.
- If still no contact has been established after trying the home number twice, we will no longer attempt to contact that customer.
- Calls with a status of 'Busy', 'No Answer', 'Answer Phone' or 'Nuisance Calls' should go to a conclusion with a Sleep time of one-hour.

If you have multiple telephone numbers in your CRM, ensure that you select the correct number as the first telephone number on which to contact the customer, when queuing calls. In our Scenario, this should be the 'Work' number.



## **Result Branch Aborted Types**

To create a recycling Flow according to the specified requirements, we firstly need to create a New Decision and associated branches for the Aborted Types.

- Pick up a New Decision <sup>(1)</sup> and drop it after the traffic lights to display the 'Select the value...' window.
- From the options available, select Last Call Result and click OK.

elect the value upon which the decision is based SYNTHESYS Call Recy	cling
Times Called C Total number of times called C Total number of times called on the last number Total number of times called on a named number Times Called in a Time Period C Total number of times called in a time period C Total number of times called in a time period on the last numt C Total number of times called in a time period on a named nun	Miscellaneous

- Double click on the Decision point, to open the 'Define Branching' window.
- Click New Branch and add a branch for each of the Aborted Types, i.e. 'Wrong Number', Number Unobtainable or Faxtone', 'Other' and 'Never Call'.



Next, click *Add Condition* and select the *Aborted Type* for each branch.

Click **OK** in the '*Define Branching*' window to return to the Call Recycling Screen.



### **New Decision Last Number Dialled**

Next, we need to create the decision point and associated branches for the contact numbers.

• Pick up a **New Decision** <sup>(1)</sup> and drop it on the Default branch, after the 'Result' Decision point. From the options available in the 'Select the value...' window, select **Last Number dialled** and click **OK**.

Select the value upon which the decision is based		
SYNTHESYS	cling	
Times Called C Total number of times called C Total number of times called on the last number C Total number of times called on a named number Times Called in a Time Period C Total number of times called in a time period C Total number of times called in a time period on the last numt C Total number of times called in a time period on a named nun	Miscellaneous C Last call result C Time period of the last call Last number dialled Time since queued Time since first called I is tied to an agent C CRM Data C Priority OK Cancel	Select 'Last Number dialled'.

- Double click on the Decision point, click **New Branch**, and add a branch for each of the telephone numbers, i.e. 'Work Number', Mobile Number' and Home Number'.
- Next, click **Add Condition** and select the **relevant telephone** for each branch.

Setup decision bra	nching using the tree window below.	
E Las	t number dialled	New Branch
	Default	Delete Branch
	Work Number	Add Condition
	equal to Work Number.Work	Delete Conditio
	Home Number	
Conditio	ons	×
If the la	ist number dialled is equal to	OK Cancel
Home	Number	



## Work Number Branch

We now need to create the recycling rules for each of the selected telephone numbers.

- Pick up a **New Decision** <sup>(1)</sup> and drop it on the Work Number branch.
- From the options available in the 'Select the value...' window, select **Number of times called on a named number** and click **OK**.

This time, create a New Branch called 'Work x3' and a Condition 'Greater than or Equal to 3'.

S	ΥΝΤΗ	ESYS Call Rec	Sycling	
Setup decision b	ranching using the tree wind umber of times called on a r	low below. named number		New Branch Delete Branch
Condition If the nur Greater	Work x3 s her of times called on a nar han or Equal to	med number is	Car	Add Condition Condition K ncel
Named Number:	Work Number.Work		Change	OK

- Next, add a **Sleep** icon to the default line of the Work Number branch and set the sleeping time to 1 hour.
- Add a **Change Telephone** icon to the Work x3 branch and change the number to be called **to Mobile Number**. At the end of the branch add a **Sleep** icon, set to 1 hour.



Now create the recycling rules for the Mobile and Home Numbers respectively.



## Mobile Number Branch

This time, we drop a 'New Decision' on the Mobile Number branch, again based on 'Number of times called on a named number'. We create a branch called 'Mobile x3', with the Condition 'Greater than or Equal to 3'.

- Add a **Sleep** icon to the default line of the Mobile Number branch and set the sleeping time to 1 hour.
- Add a **Change Telephone** icon to the Mobile x3 branch and change the number to be called **to 'Home Number'**.
- To end the branch, add a '**Retime**' <sup>(1)</sup>/<sub>(2)</sub> icon as we wish to call the home number only in the evenings.



# **Selecting Time Periods**

When placing the Retime icon, the **Select Time Period** window opens. Click '**New Time Period**' and enter '**Evenings**' as the name for the time period, then click **OK**.

Select Time Period	New Time Period
SYNTHESYS Call Recycling	Type a name for the new time period.           Evening         OK           Cancel         OK
Select or create a time period:       Image: Comparison of the period         Evening       Image: Comparison of the period         Warning! Editing a time period, will affect all decisions in the script using that period.       Edit Time Period         Delete Time Period       Image: Comparison of the period	
OK Cancel	

We now need to select the required time period in the grid of the *Time Period* window.



In the grid of the Time Period window, set the required time periods.

The only available Time Periods that can be selected here are those that have been set to 'Active' in the 'Active Times' window when setting up your Outbound List.



To set time periods, click and drag your left mouse button in the required cells. To deactivate time periods, use your right mouse button or click the 'Clear' button.

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- Dark Grey Time periods already In Use that can't be selected
- Orange Current active times period, selected for the currently specified time period
- Light Grey The Outbound list is currently 'Inactive' or no active times have been enabled in the 'Active Times' window when setting up your Outbound List

Click **OK** to commit the settings for the selected time period.

#### **Home Number Branch**

On the Home Number branch, create a 'Home x2' branch, again based on 'Number of times called on a named number', with the Condition 'Greater than or Equal to 2'.

Add a **Sleep icon** (1 hour) to the default '**Home Number**' branch and on the '**Home x2**' branch, add a '**Strategy Complete**' icon. Thus the call is not processed through any further recycling rule but is instead marked as 'Finished'.





# **Completed Recycling Script**



Your completed Recycle Flow should look as follows:

Remember to Save your recycling rules, before exiting the Recycling Designer.



## **Decisions based on CRM Data**

Using the *CRM Data* option, users can recycle aborted calls based on information contained within the CRM fields of a campaign.

- Right click on your Outbound list and select **Set Recycling Rules** to open the Recycling Designer:
- Pick up a New Decision <sup>(1)</sup> and drop it into your recycling script to display the 'Select the value upon which the decision is based...' window.
- From the *Miscellaneous* options available, select CRM Data and click OK.

elect the value upon which the decision is based SYNTHESYS Call Recy	cling
Times Called Total number of times called Total number of times called on the last number Total number of times called on a named number Times Called in a Time Period Total number of times called in a time period Total number of times called in a time period on the last numt Total number of times called in a time period on a named nun	Miscellaneous C Last call result Time period of the last call Last number dialled Time since queued Time since first called Is tied to an agent CRM Data Priority
	OK Car

• Double click on the Decision point and in the *Define Branching* dialog, click **New Branch.** Add a new branch entering a logical branch name.

In our example we have created a branch called Date.

File View Time Peri	iods Help	
	Define Branching	American American Susp
	OK	

Next, click the Add Condition button, to open the Condition Criteria dialog.



To create a condition based on a CRM field

- Click the *Create Condition* 2 icon.
- Select the relevant CRM field to define your condition. In our example we have selected the *CRM DateTime* field **<Current DateTime>**.

Delete Condition	N View Condition Summary
Condition Criteria	
* <u>&gt; / * 1</u>	OK Cancel Help
Please select an input field that	the condition relates to:
Current DateTime	-
Current Date Line Customer ID FirstNiame	
Home Postcode	
Specific DateTime Surname	
Title << Town	Help
Work	

Create Condition Duplicate Conditions

×

**Create Condition.** Click this icon, to create a new condition. To edit existing conditions, double-click on the relevant condition disc.

**Duplicate condition.** Click this icon, to duplicate an existing condition.

**Delete a condition.** Select the disc that you wish to delete, then click on the 'Delete condition' icon.

**View condition summary.** Click this icon, to view a summary of all conditions.

• Move to the next pages of the wizard , first selecting the required operator, i.e. '**between'**, and then specifying the date and time range for your condition.

'Current DateTime '	'Current DateTime ' between
Please select an operator from the fist below.	Please define date value to be compared with the field Use Calculations (Today) Use Calculations
Cancel Help	Cancel Help

In the next page of the wizard *add a name for our condition* and click *Finish.* 



The condition that you have created will be displayed as a *Venn Diagram*, showing a floating disc 'Date'.

- Further conditions can be defined, clicking the **Create Condition** Dicon.
- Condition Criteria
- To edit existing conditions, double-click on the relevant condition disc.



Discs that overlap with one or more other discs imply a Boolean 'AND' to operate between the conditions (**Date**) OR (**Condition2** AND **Condition3**).

Each condition can be manipulated, clicking and dragging it around the canvas. If two discs overlay completely, press **Control** on the keyboard to drag them apart.

 Click OK to close the Condition Criteria dialog and to display the CRM Data branch as part of your recycling rules.





To add the CRM Data branch to our recycling script

• Click **OK** in the **Define Branching** dialog, to return to the Synthesys Call Recycling screen.

The **CRM Data** branch will now be displayed as part of your recycling rules.

In our example, we have added a 'Change Campaign' icon at the end of the CRM Data branch, to move aborted calls that match the given criteria to another Outbound list.





## **Decisions based on Priority of Call**

In the Advanced Recycling Designer, aborted calls can also be recycled based on their *Priority* setting in the Phoenix\_Queue table.



Call priority settings in the Queue table can be changed, for example via Bulk Queue Change selecting from ranges between 0=Idle, 1= Low or 10=High, or by setting a string value, e.g. 'High' or 'Low'.

In the Outbound List Advanced Options dialog select **PriorityOrder** and enter either **Desc, Asc or None,** to determine how prioritized records are presented to the agents. **Desc** presents calls with higher priority settings first.

To use the *Priority* option as part of recycling rules

- Right click on your Outbound list and select Set Recycling Rules to open the Recycling Designer.
- Pick up a New Decision <sup>1</sup>/<sub>2</sub> and drop it into your recycling script to display the 'Select the value upon which the decision is based...' window.
- From the *Miscellaneous* options available, select **Priority** and click **OK**.



Please see next page for more information.



To create the condition based on Priority

- Double click on the *Decision* point and in the *Define Branching* dialog, click **New Branch.** Add a new branch, entering a logical branch name, i.e. '*High Priority*'.
- Next, click the **Add Condition** button to open the *Condition Criteria* dialog and define your condition, as required.

In our example we have selected *Equal to* and entered 9.

Synthesys Call Recycling	the late of the la	
File View Time Periods Help		
Last all result Last all result Totar souther of times called	Let et near Localandia Localandia The failed The failed	
High Priority	OK	-

 Click OK in the *Define Branching* dialog, to return to the Synthesys Call Recycling screen.

You can now define the rules that should apply, for example, move calls with Priority 9 to a High Priority Outbound list.

🖨 Synthesys Call Recycling	
File View Time Periods Help	
Let al read Let al read Let al read Toto worker of forms called Let al read Toto worker of the scale is need Toto worker Toto wo	
Inesay	

Remember to Save your recycling rules, before exiting the Recycling Designer.



## COPYING A RECYCLING SCRIPT

You can copy an existing Recycling script from one outbound list to another, as long as both outbound lists use the same CRM prefix.



Be aware however that when using the **Retime** option to set specific time periods for callbacks you must ensure that **the Active Times enabled** in your **destination outbound list match the time periods specified** in the Recycling rules that you wish to copy.

#### In the Recycling Designer:

• Go to File on the Menu bar and select the Copy script option.



In the *Copy Script* window, now displayed, the Outbound lists using the same CRM prefix will be listed. In our example, the CRM prefix is 'ELECT'.

••	C	all Recycling /
ease select a destination o	campaign:	CRM Prefix: ELECT
Account	Campaign	Outbound Campaign
Telebusiness Callflows	ElectroCB	Customer Survey
Telebusiness Callflows	ElectroCB	Sales Deschare Fallendia
	2100000	

• Select the Destination campaign and click OK.

The current recycling script has now been copied to the selected outbound list.



# CREATING A RECYCLING RULES TEMPLATE

It is also possible to create a template of recycling rules that fit your own requirements, thus replacing the existing default rules.

To create the template:

• Go to the *Edit* menu in the Outbound Manager and select *Edit Default Recycling Rules.* 

🕻 Synthesys - Outbound Manager		0-0-0		and the second s	nd .	-	
File Edit View Help							
Queue calls using Selective Que	uing Import						
Queue calls using Selective Que	uing File Import	Outbound List	Retry Time	Times Cal	Agent ID	Agent Name	Telephone
Remove Queue calls using Selec	tive Queue Monitor	CRM Recycling	n/a	1	none	None	1212121212
🕀 🥫 Delete SQI Prefixes		CRM Recycling	n/a	1	none	None	13232323
Delete SOM Prefixes		. CRM Recycling	n/a	1	none	None	12121212
Drosers DaNietCallList for antiss queue		. CRM Recycling	n/a	1	none	None	112121212
Process DoiNotCaliList for entire	queue	CRM Recycling	n/a	1	none	None	2121212122
Bulk Change Queue		<ul> <li>CRM Recycling</li> </ul>	n/a	5	none	None	12121234343434
Edit Default Recycling Rules		<ul> <li>CRM Recycling</li> </ul>	n/a	6	none	None	1212121233
Brigitte Test2011	111X	CRM Recycling	n/a	1	none	None	1212121212
Brigitte09	30575 CRMMOD.	CRM Recycling	n/a	4	none	None	1212121212
BrigitteJan2012	30575 CRMMOD.	CRM Recycling	n/a	5	none	None	12121212
CRM	30575 CRMMOD.	CRM Recycling	n/a	0	none	None	
CRM Modify Test	30575 CRMMOD.	CRM Recycling	n/a	0	none	None	
CRM Recycling	30575 CRMMOD.	CRM Recycling	n/a	0	none	None	
Date Time	30575 CRMMOD.	CRM Recycling	n/a	0	none	None	
A Mars Pagesting	30575 CRMMOD.	CRM Recycling	n/a	0	none		1212121212
	30575 CRMMOD.	CRM Recycling	n/a	1	none	None	12121212121212
Surname A Town B	30575 CRMMOD.	CRM Recycling	n/a	2	none	None	13232323232
CRM Notes Test	30575 CRMMOD.	CRM Recycling	n/a	2	none	None	1212121212
CRM SQI SQM test	2z430575 CRMMOD.	CRM Recycling	2012-02-29 17:11	5	none	None	12121212221
CRM SQITest	222 305/5 TRN_1	CRM Recycling	2012-02-29 17:11	3	none	None	112 234 4444
HTML Email	222 30575 TRN_10	CRM Recycling	2012-02-29 17:11	2	none	None	113 343 4541
Popscript	224 30575 TRN_15	CRM Recycling	2012-02-29 17:11	3	none	None	113 343 4541
🍫 Popwatch	224 30575 TRN_2	CRM Recycling	2012-02-29 17:11	1	none	None	113 343 2322
- 👆 TestCall Tracker	224 30575 TRN_22	CRM Recycling	2012-02-29 17:11	3	none	None	112 112 2211
UMS test	2z4 30575 TRN_27	CRM Recycling	2012-02-29 17:11	5	none	None	112 010 4333
BrigitteJuly2011	30575 TRN_28	CRM Recycling	n/a	2	none	None	113 443 2321
🗄 👘 Bull	00/30575 TRN_29	CRM Recycling	n/a	2	none	None	113 343 1001
🗉 👘 Camelia test	30575 TRN_3	CRM Recycling	n/a	3	none	None	112 343 4454
	200 30575 TRN_32	CRIVI Recycling	n/a	3	none	ivone	113 343 9191
DAF Inbound Applications	A 20575 TRN 8	CRM Recycling	n/a	2	none	None	112 234 4333
DAF Outbound	4 30575 TRN_9	CKIVI Kecycling	n/a	5	none	ivone	113 343 2321
H dazza							
DemonstrationandTrainingScripts							
Elliot			m				F
Middle of the Queue. Hit page down for mo	re records 31 Qu	eue Items.					
and the second secon	New York Control of Co					And the second s	

In the *Recycling Designer* subsequently displayed, you can edit and save your recycling rules, as required.

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The new **Default Recycling rules** will now be displayed automatically, for any new Outbound list that you set up.