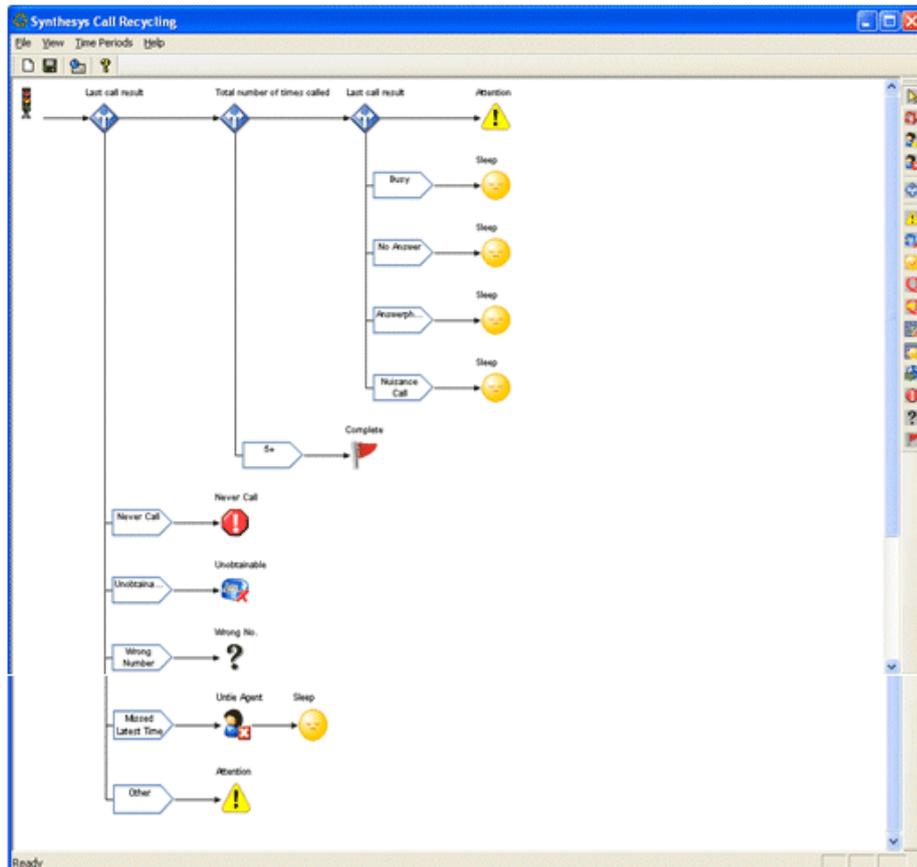


Synthesys Call Recycling



SYNTHESSYS 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 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
	Start a new Recycling Script.
	Save and Release the currently displayed Recycling Script.
	Open the Time Period window to select or create time periods.
	Display information about the version of the Recycling Designer.

The Recycling Toolbar

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



- 

Activate the selection tool.
- 

Change the Telephone Number to call.
- 

Tie to Agent, to ensure that the agent who took this call will get the call when it is recycled.
- 

Untie from Agent, to allow any agent to take this call when it is recycled.
- 

Add a New Decision to enable Branching on different criteria and events.
- 

Change state to **Attention**.
- 

Change state to **Unobtainable**.
- 

Sleep the call, for example, sleep a 'busy' call for ten minutes'
- 

Queue the call to this campaign, with the number of times called remaining unchanged.
- 

Re-queue to this campaign but set the original call to *Finish* and queue as a new call, with the number of times called being set to zero (0).
- 

Change Campaign will queue the call to a new campaign and marks the call as *Finish* in the original campaign.
- 

Change Campaign and Sleep will queue the call as a sleeping call to a new campaign and marks the call as *Finish* in the original campaign.
- 

Retime (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.
- 

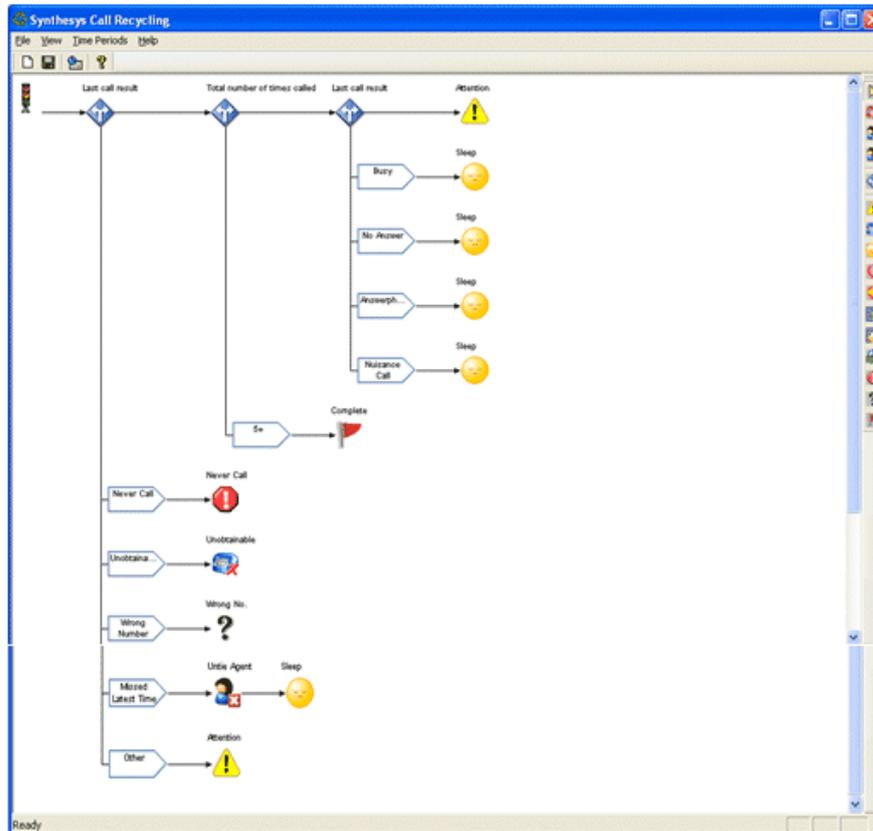
Never Call, shows a list of all clients that do not wish to be contacted again.
- 

Wrong Number, refers to an incorrect number associated with a client to be called.
- 

Change state to **Strategy Complete**. 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	 Never Call
Unobtainable & Faxtone	 Unobtainable
Wrong & Invalid Number	 Wrong Number
Missed latest time period	  Untie from agent, then Sleep for 1min
Other	 Attention
Busy	 Sleep for 30min
No Answer	 Sleep for 4hours
Answerphone	 Sleep for 24hours
Nuisance Call	 Sleep for 3 days

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



Result Branch 1

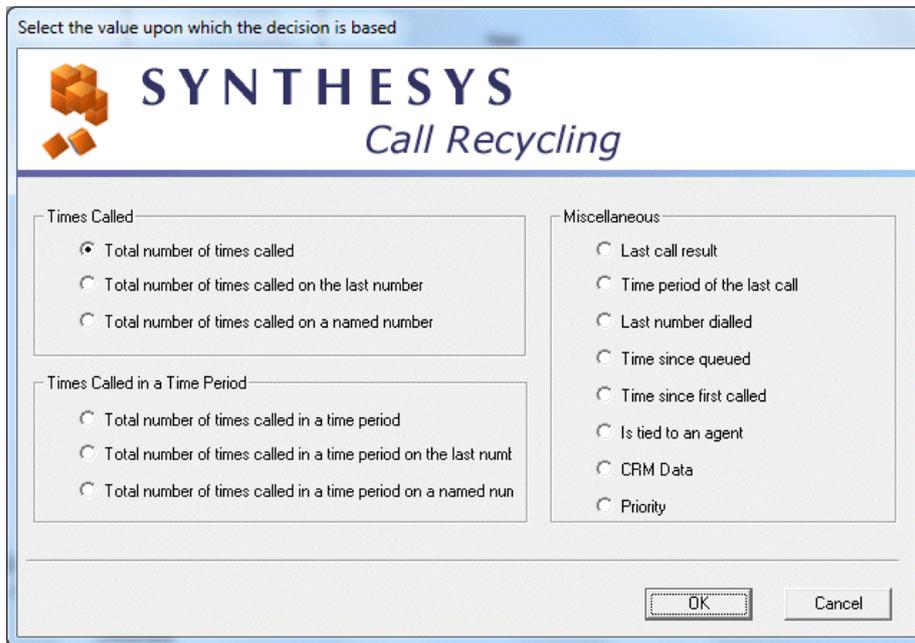
For each of the required Outcomes we then have placed the relevant Conclusion icon at the end of the branch.

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.

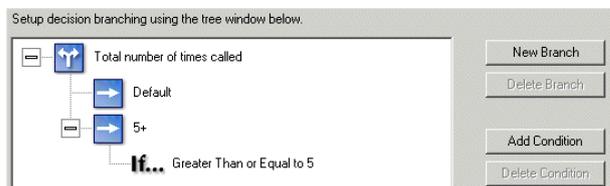
We have picked up a **New Decision**  and placed it after the traffic lights, to display the 'Select the value... ' window.

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



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.

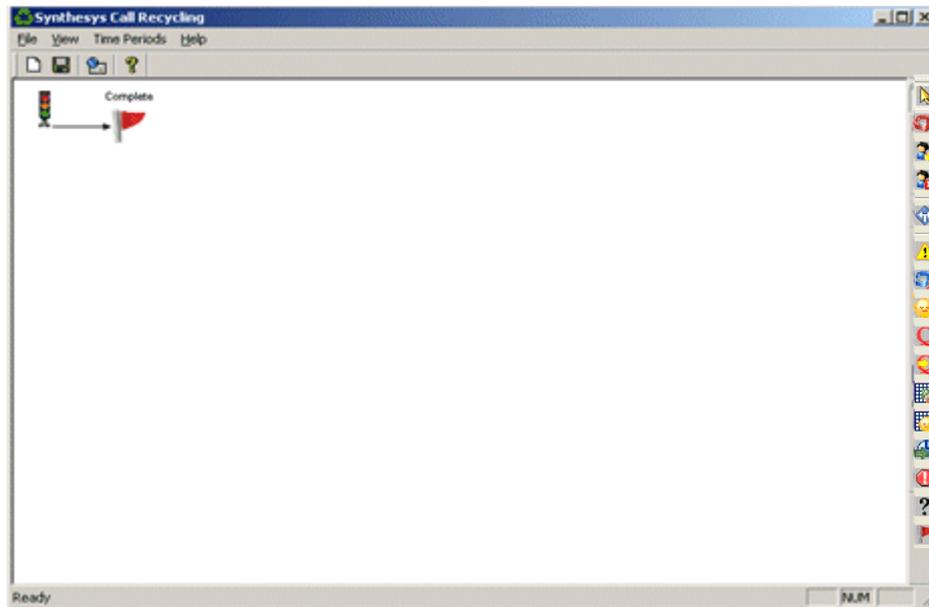


We then dropped the **Strategy Complete**  icon at the end of the branch.

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:

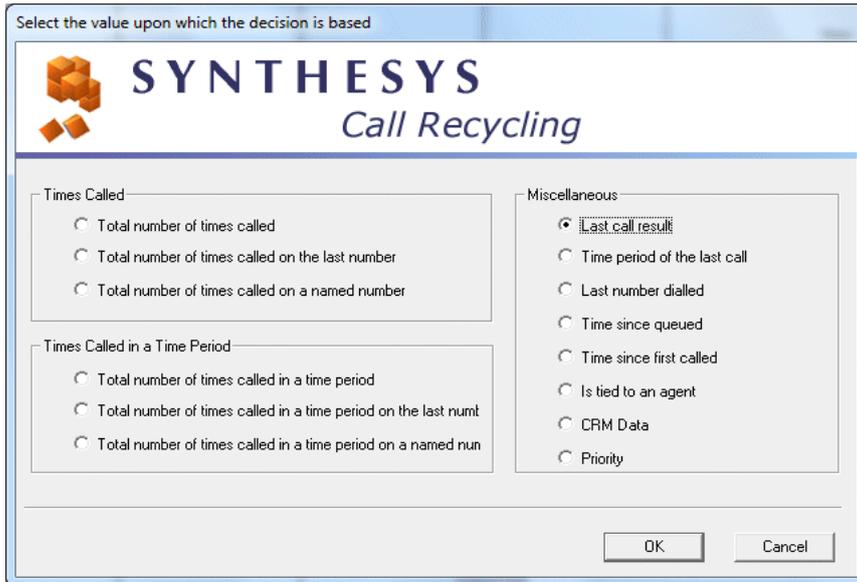
- Calls aborted with ‘Never Call’, ‘Number Unobtainable or Fxstone’, ‘Wrong Number’ or ‘Other’ should go to the respective conclusion flags.
- Customers initially are to be called on their work number.
- If they can’t be reached by the third call attempt, we phone their mobile number.
- If customers 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.

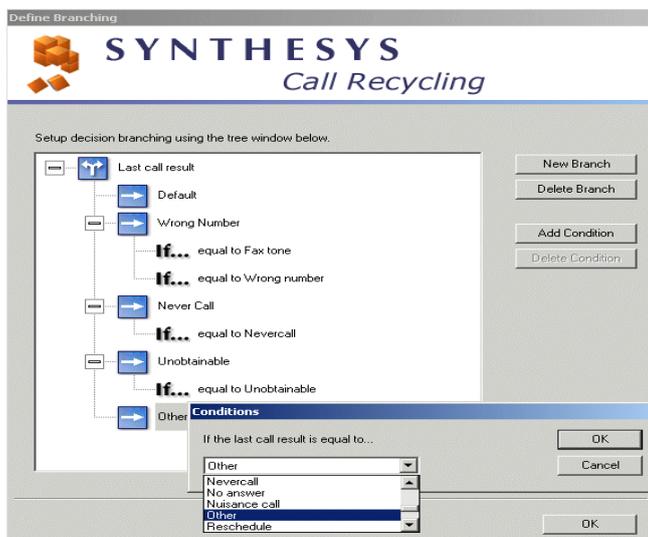
Result Branch Aborted Types

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**  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**.



- 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 Fاختone', 'Other' and 'Never Call'.



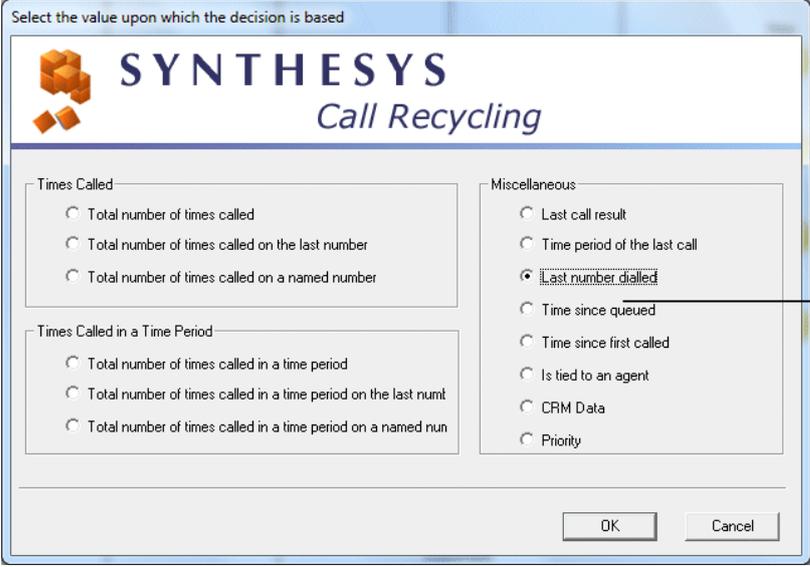
Next, click **Add Condition** and select the **Aborted Type** for each branch.

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

New Decision Last Number Dialed

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

- Pick up a **New Decision**  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 dialed** and click **OK**.



Select 'Last Number dialed'.

- 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.



Work Number Branch

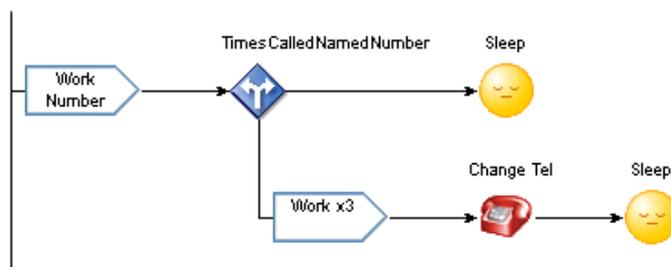
We now need to create the recycling rules for each of the selected telephone numbers.

- Pick up a **New Decision**  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'.



- 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.

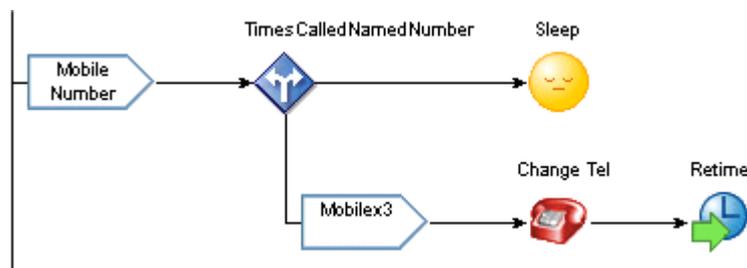


Now create the recycling rules for the Mobile and Home Numbers respectively.

Mobile Number Branch

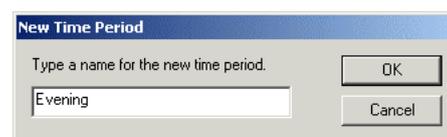
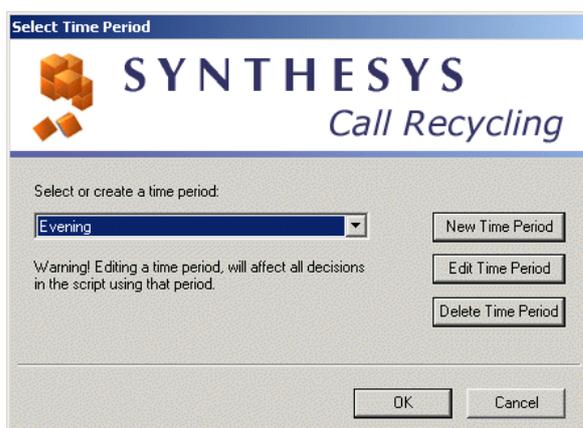
This time, we drop a 'New Decision'  on the Mobile Number branch, again based on 'Number of times called on a named number'. We create a branch called 'Mobile x3', with the Condition 'Greater than or Equal to 3'.

- 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'  icon as we wish to call the home number only in the evenings.



Selecting Time Periods

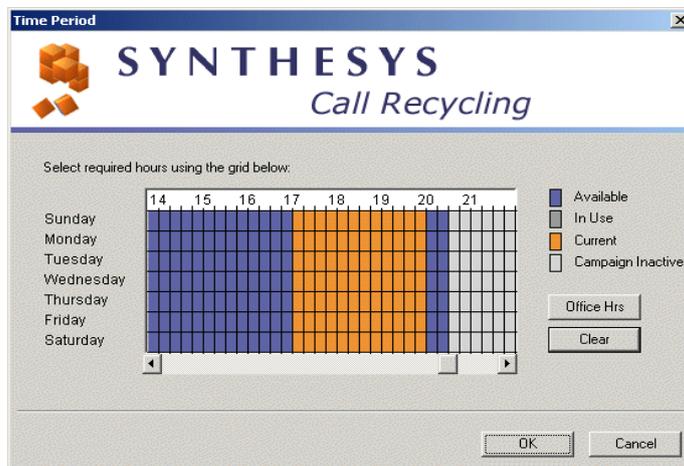
When placing the Retime icon, the **Select Time Period** window opens. Click '**New Time Period**' and enter '**Evenings**' as the name for the time period, then click **OK**.



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.



The Current active times are displayed in orange colour.

In our example we have set the **Current** active times from 17.00– 20.00.

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.

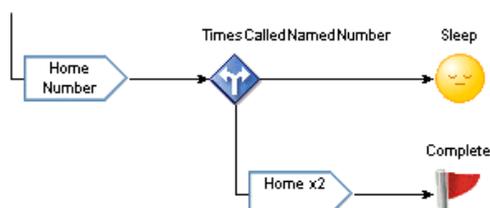
- Lavender Blue Available time periods that can be selected
- Dark Grey Time periods already In Use that can't be selected
- Orange Current active times period, selected for the currently specified time period
- Light Grey The Outbound list is currently 'Inactive' or no active times have been enabled 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

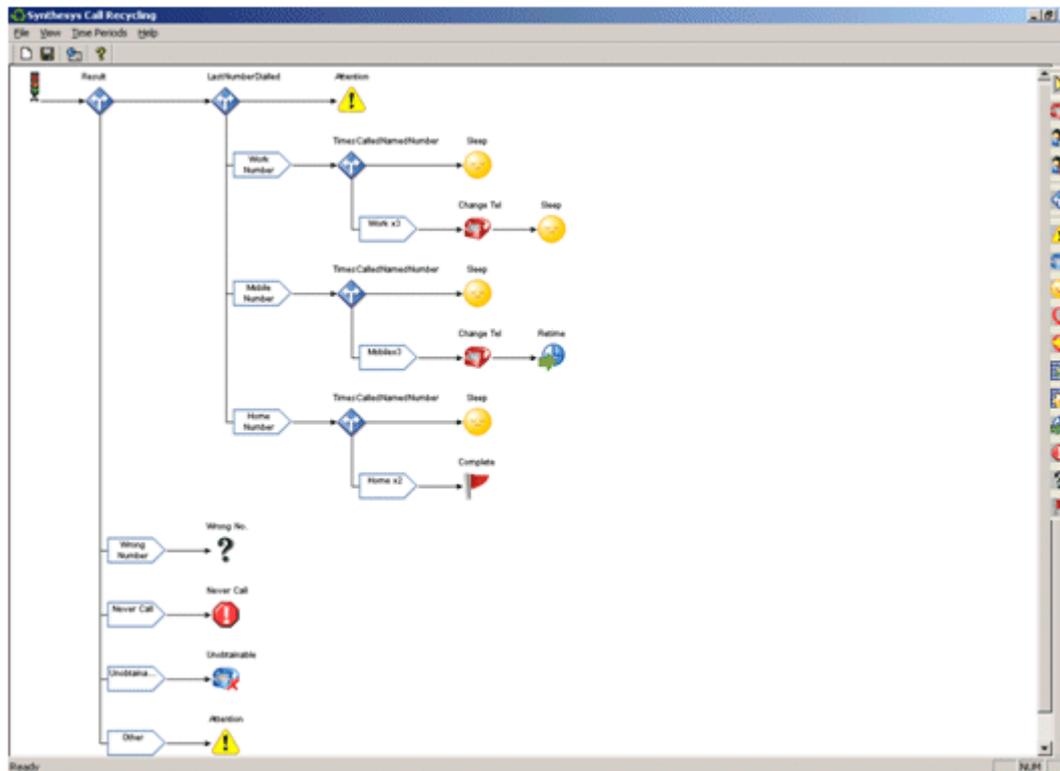
On the Home Number branch, create a 'Home x2' branch, again based on 'Number of times called on a named number', with the Condition 'Greater than or Equal to 2'.

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:

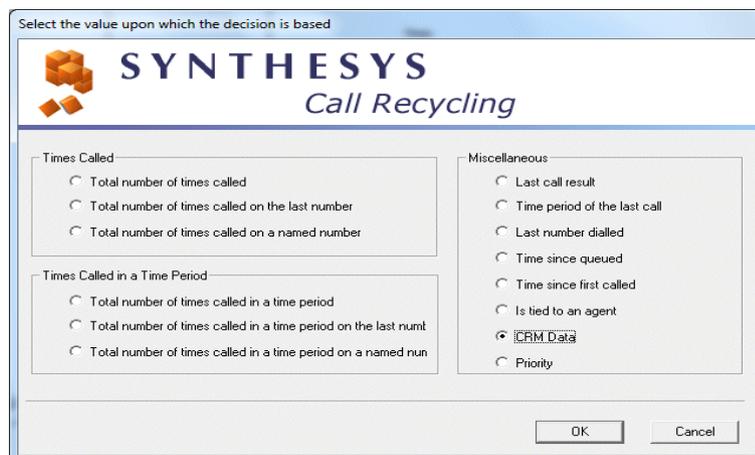


Remember to **Save** your recycling rules, before exiting the *Recycling Designer*.

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**  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**.



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

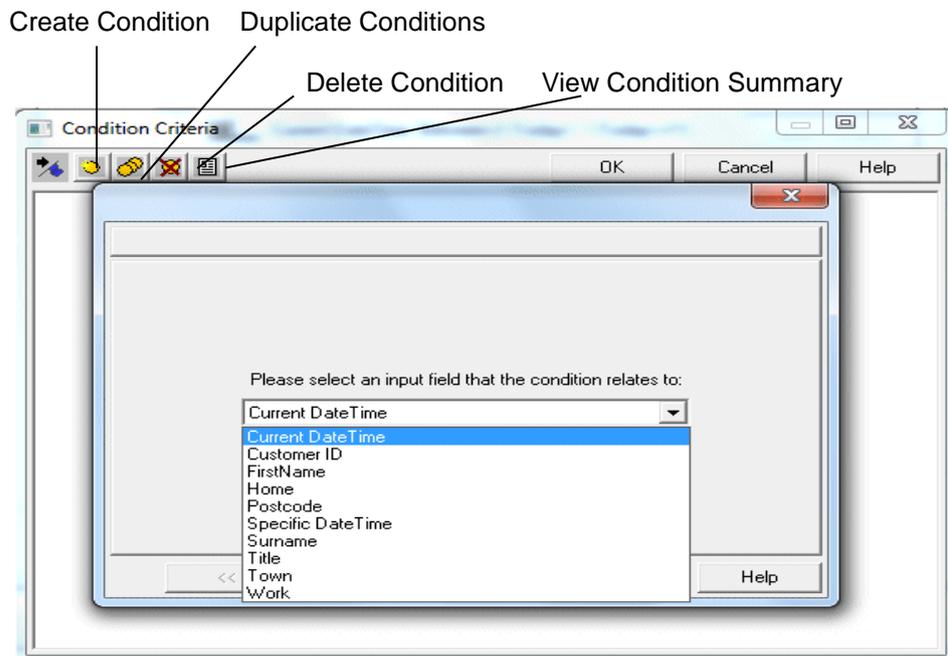
In our example we have created a branch called **Date**.



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

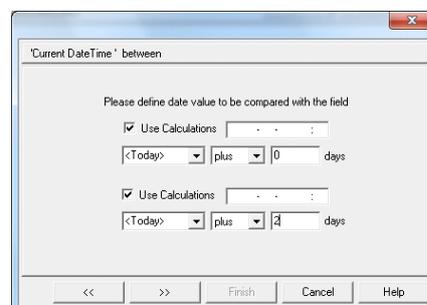
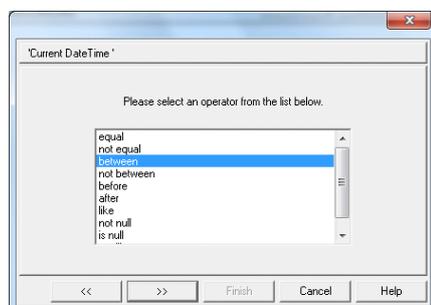
To create a condition based on a CRM field

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



-  **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.

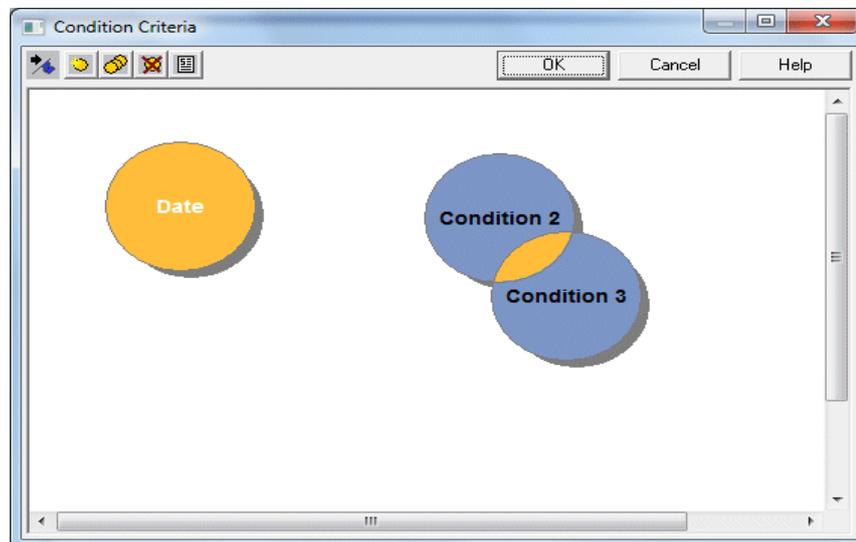
- Move to the next pages of the wizard , first selecting the required operator, i.e. **'between'**, and then specifying the date and time range for your condition.



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**  icon.
- 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.

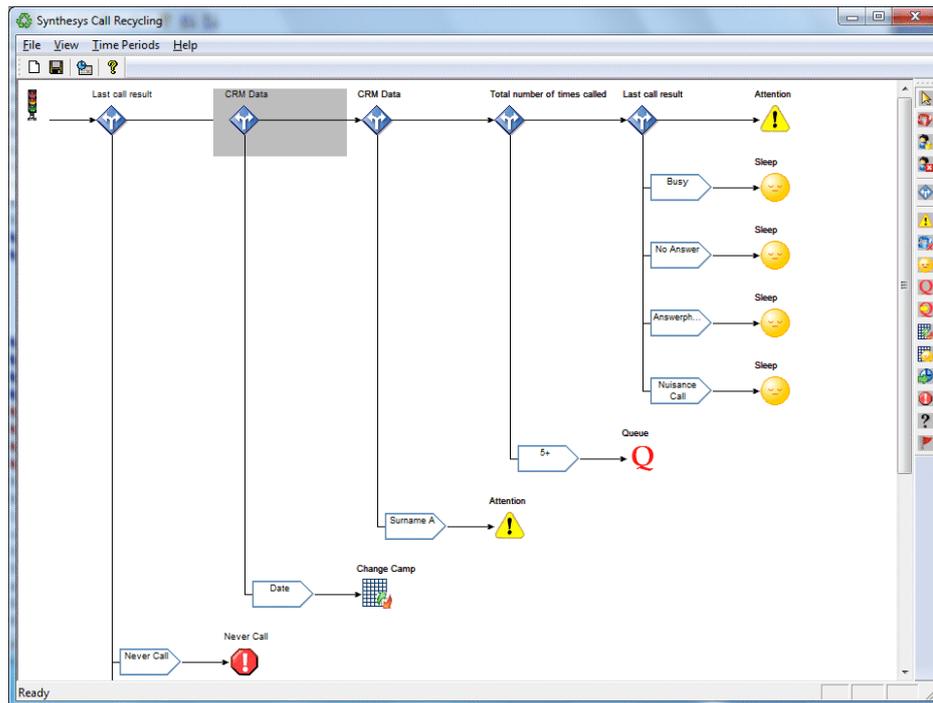


To add the CRM Data branch to our recycling script

- 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**  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**.

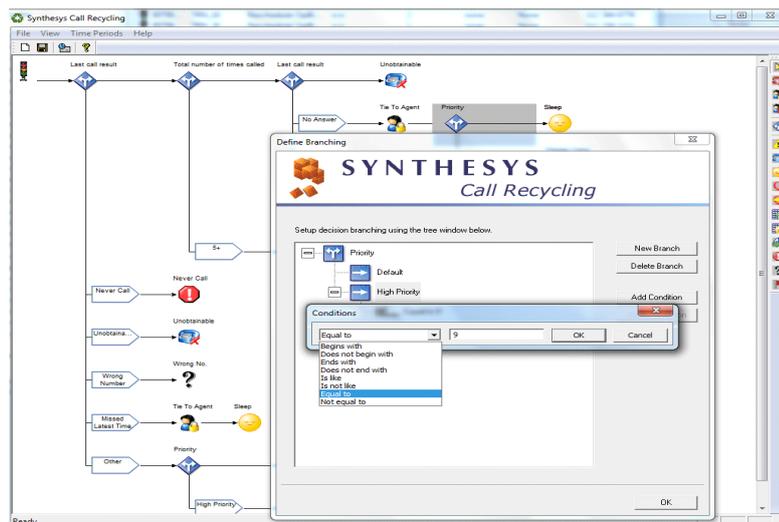


Please see next page for more information.

To create the condition based on **Priority**

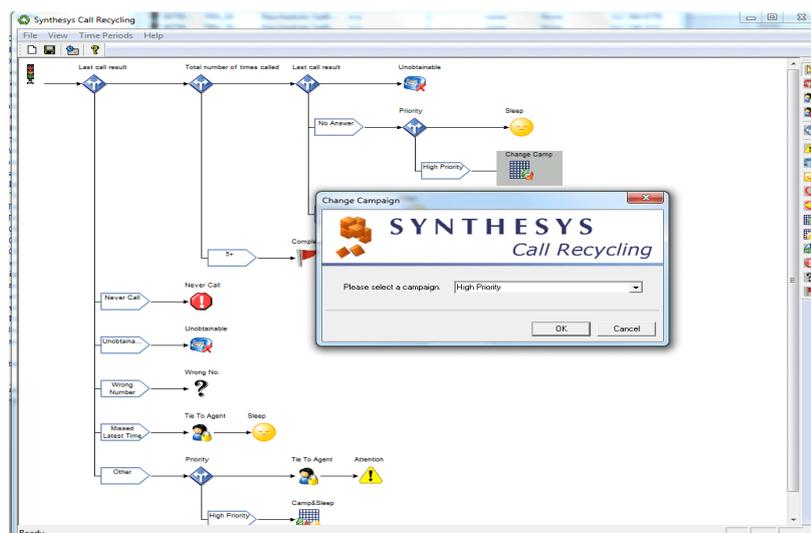
- Double click on the *Decision* point and in the **Define Branching** dialog, click **New Branch**. Add a new branch, entering a logical branch name, i.e. '*High Priority*'.
- Next, click the **Add Condition** button to open the *Condition Criteria* dialog and define your condition, as required.

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



- Click **OK** in the **Define Branching** dialog, to return to the Synthesis 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.



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

COPYING A RECYCLING SCRIPT

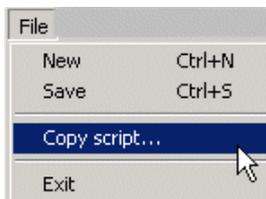
You can copy an existing Recycling script from one outbound list to another, as long as both outbound lists use the same CRM prefix.



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'.



- Select the Destination campaign and click OK.

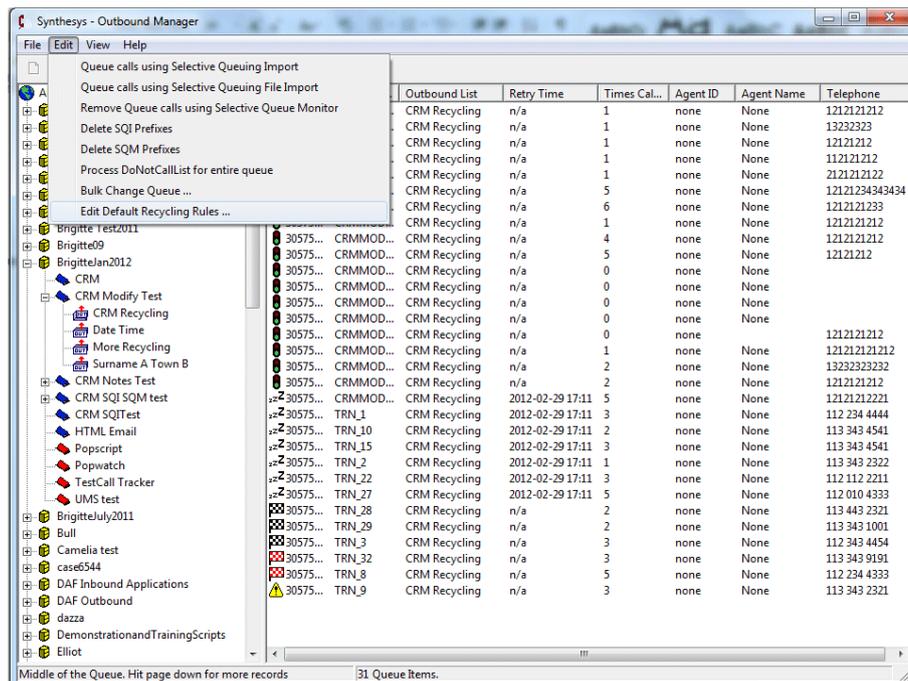
The current recycling script has now been copied to the selected outbound list.

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**.



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



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