

CUSTOMER RELATIONSHIP MANAGEMENT

Customer Details

| F | ² / ₂ ≠ | | BR July09 - Product Order Line | Synthesys | | _ = × |
|--------|--|--------------------------------------|---|----------------------------------|--|-----------------------|
| 9 | Take Calls Custom H | Help | | | | Style 👻 🙆 |
| Open | Log Abort Next Er Out Take Calls | nd Call Next Rotas Tracker Action | Search New Customer Details Customer | Dial Get Next Customer Record | Call Call Call Call Call Call Call Call | er 💌 |
| Goo | d Afternoon May | I take your surname | please? | | | |
| Custor | ner | | | | | 4 Þ |
| | Customer ID [not null] Name — Title FirstName Surname Telephone Address — Line1 | ABORT_4 | | | | 4 |
| | Line? | 10 Minute Minute | Customer Designer | | Descation | |
| | Line2 Line3 Line5 Line6 PostCode | 12 West Way London SW11 | Tree New customer Outcomer ID Outcomer IReference Nul Control America Control Onetica Name Control Onetica Telephone Cont New New | ol rol | Properties May I take your Cust please? String size 40] Default Extended Extended | omer Reference Number |
| | | | <u>N</u> ew | | Ok | Cancel |



CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

| INTRODUCTION | 3 |
|--|----|
| ASSIGNING CRM | 4 |
| Creating a new CRM Table | 5 |
| Adding a Noetica Control to your CRM | 6 |
| Editing Noetica Controls | 7 |
| Entering Agent Dialogue | 8 |
| Saving the CRM Table | 8 |
| Saving a CRM Table under a new Prefix | 8 |
| Properties: Settings & Customisation | 9 |
| Viewing & Editing a CRM | 10 |
| Picking up an existing CRM Prefix | 10 |
| The CRM Control Gallery | 11 |
| CRM DATA IMPORT WIZARD | 12 |
| Importing CRM Data Immediately | 13 |
| Scheduling a CRM Data Import | 14 |
| CRM IMPORT LOG FILES | 15 |
| Stages of CRM Fast Import | 15 |
| CRM Fast Import creates the following files: | 15 |
| CRM DATA EXPORT WIZARD | 18 |
| CRM DATA UPDATE, USING THE EXPORT WIZARD | 19 |
| CRM & EXTERNAL DATABASE LINK | 20 |
| Selecting External Data Sources | 21 |
| Binding Customer ID to External Table Column | 22 |
| CRM MAINTENANCE | 25 |
| CRM History Cleanup | 25 |
| CRM Delete Prefix | 26 |
| TAKING A TEST CALLS ON THE CRM | 27 |
| Attaching Notes to a CRM Record | 28 |
| Attaching a Document to a CRM Record | 29 |



Introduction

The Customer Relationship Management module is designed to allow access to both customer profiles and customer histories, providing the agent with the best possible help in dealing with customers' queries and requests.

Customer Relationship Management fully integrates with the other functions of Synthesys and allows the agent to view data from a variety of sources.

To the agent the Customer Relationship Management module behaves like another screen of the callflow. Within this screen the agent is able to search for existing customers by entering any known details, such as a telephone number or a name, or simply the first letter of the surname in combination with wildcards (*).

Once the customer has been identified all information previously collected can be accessed and will be available to the agent throughout the call. This can include the customer's personal details and previous contact with the company, as well as the reasons for the call, i.e. brochure request, order or query etc. Agents can also attach notes or documents with information relevant to a customer to a customer record.

In addition to searching for customer details and viewing a customer's history agents can create new customer records following prompts in much the same way, as they would do in a normal callflow run.

Customer interactions can be tracked and viewed in both in-bound and out-bound calls.



ASSIGNING CRM

The CRM (Customer Relationship Management) contains the customer data and is usually placed at the beginning of a callflow, directly behind the traffic light.

- Select *Campaigns* under the **Setup** heading of the Synthesys main screen and open the campaign for which you want to add the CRM.
- In the Campaign Editor, click your left mouse button on the CRM icon on the CRM toolbar, to pick up the CRM.
- Place your cursor directly behind the traffic light and add the CRM to your callflow with a click of the left mouse button.
- Enter a short descriptive name for the CRM.



- Open the CRM screen view with a double click of the left mouse button.
- Enter a name for the CRMRunner control and click OK to add the control.

| No control selected. | | | |
|----------------------|--------------------|-----------|---|
| | Control Name | X | 1 |
| | enter control name | CRMRunner | |
| | | <u>OK</u> | |

Until you have created the CRM table in the controls *Maintenance* page, no information will be displayed.

| • | 4 |
|----------|----------|
| | 1 |
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| | 2 |
| | |

See next page for designing the CRM table.



Creating a new CRM Table

To open the CRM Designer dialog and to set up a new CRM table:

- Click on the Design Table *control* and select *Maintenance* from the drop down menu.
- Select *Customer Details* on the left side and enter a unique prefix into the *Prefix* window on the right. The prefix can contain up to 6 characters.

| Customer Designer | | Prefix AHA Customer is not represen External Data S | ted by any external table. Tables | Enter your unique CRM Prefix For external Data Source option, see section 'CRM & External Database Link'. |
|-------------------|---------|---|--------------------------------------|---|
| Prefixes | Save As | Save | Cancel | |

• Next, expand the 'Tree' structure, double click on *New* and create your CRM table using the property types in the *New…* window.

| Customer Designer | | | |
|-------------------|-------------------|---|--------|
| Customer Details | | | |
| | New Property type | me C Enumeration lephone DateXTime ntrol E-mail | |
| | Save As | Save | Cancel |



To enable CTI Auto Search you must use a Telephone field to capture the customer's telephone number and the Email option to capture the email address when using Email OB campaigns as part of your recycling rules.

To display the customer's name when parking/un-parking a call, you must use the Noetica Name control or the Name field.



Adding a Noetica Control to your CRM

In the *Customer Designer*, highlight **New** in the tree structure on the left-hand side to display the 'New' window.

- Select Control in the Property type section and from the list displayed
- Select the required Noetica control and click OK.

| New | | × |
|--|---|------------------------------|
| Property type C Text C Number | C Name C Telephone | C Enumeration C Date&Time |
| Noetica CheckBo Noetica Address Noetica Name Co Phoenix Payment Noetica Telephor | x Control Control ntrol Control e Control | |
| Property name Noetica Address | Control | OK Cancel |

The selected Noetica controls will now be displayed in the Customer Designer.

| 🍰 Customer Designer | | | |
|---------------------|---------|-------------------------|--------------|
| Customer Details | ntrol | May I take your address | sss, pleasae |
| Prefixes | Save As | Save | Cancel |



Remember to use the Telephone or Email option to capture the customer's telephone number and email address to facilitate CTI Auto Search and emails as part of advanced recycling rules.

Use the Noetica Name control or the Name field, to display the customer's name when parking/un-parking a call.



Editing Noetica Controls

To edit the properties of a Noetica control:

- Click on the **Control Settings** to open the Settings window.
- To remove available DB properties, double click on the green tick in the Name column of Available DB Properties, turning the tick into a red cross.

| Settings | | | |
|-------------|---|---------|-------------|
| Address | | 1 | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | - | |
| | | | |
| | | | |
| | | | |
| Name | ailable DB Properties Tree pseudonym | Type | Properties |
| V Line3 | Line3 | String | Maintenance |
| V Line4 | Line4 | String | ок |
| 🔀 Line5 | | String | Cancel |
| New Yorkson | | China - | |

• To display the *Properties* window of a control, click the *Properties* button in the Settings window.

In the Address Control Properties window adjust your Address control as required.

| Noetica Address Control Propert | ties | × |
|---|--|---|
| General ShortKey Lookup Mone Find Address Address With Ambiguities Postcoding Full Postcoding | required postcode format Always 1 space Always 7 long Always 8 long | |
| | OK Cancel Apply | |

• Click OK to return to the Customer Designer window.



Entering Agent Dialogue

To enter the agent dialogue for the individual controls:

- Select the relevant field on the left-hand side of the Customer Designer window, i.e. *Address*.
- Type the appropriate prompt on the right-hand side: *May I take your address, please*?

| 💑 Customer Designer | | | |
|---|---------|------------------------------|--------|
| Customer Designer Customer Details Customer Details Customer ID G Title Surname Surname Surname Surne1 Surne2 Surne3 Surne5 Surne5 Surne5 Surne5 New | ntral | May I take your address, ple | |
| Pre <u>f</u> ixes | Save As | Save | Cancel |

Saving the CRM Table

Having designed your table:

- Click **SAVE**, to publish your CRM table.
- Click **Yes** to the message **Are you sure you want to modify customer structure**, if you have changed an existing CRM table

Saving a CRM Table under a new Prefix

Using the **SAVE AS** option, users can save an existing CRM under a new prefix, thus creating a new CRM table.

This way, the CRM fields of the original prefix are retained, but without the associated customer data.



Properties: Settings & Customisation

To configure the appearance of the CRM table:

• Right click on the CRMRunner control and select **Properties** from the drop down menu.

In Settings, your CRM prefix will be displayed automatically.

- Placing a tick into the available options 'Search', 'Insert', 'Modify' and 'Results' will enable the corresponding icons and allow agents access to the associated information when taking live calls.
- Placing a tick against the fields in the CRM table under the specific headings will display the information to the agents when taking live calls.



Search: Fields enabled for customer search.

Insert: Fields enabled to enter new customer details.

Modify: Fields enabled for updating customer records

Result: Fields displayed in the ambiguity list.

- Click OK to display your CRM.
- Enter the text for the CRM into the agent dialogue box.
- Return to the Flow View in the Campaign Editor and save and publish your callflow, before taking a call in the Agent view.

| d < <salutation></salutation> | May I take your surname please? |
|-------------------------------|---------------------------------|
| | |
| | |
| | |
| Customer ID [not nu | u) |
| Name | |
| Title | |
| FirstName | |
| Surname | |
| Telephone | |
| Address | |
| Line1 | |
| Line2 | |
| Line3 | |
| Line4 | |
| Line5 | |
| Line6 | |
| PostCode | |
| | |



Viewing & Editing a CRM

To view or edit an existing Customer Relationship Management table:

- Double click on the CRM section in the Campaign Editor
- To add, edit or delete fields in the CRM table, right click on the CRM and select **Maintenance** to open the Customer Designer
- To view or configure the settings in your CRM table, go to **Properties**, where you need to tick any newly added fields to display them to the agents when running a live call.

| | • |
|------------------------|---|
| Customer ID [not null] | |
| Name | · · · · · · · · · · · · · · · · · · · |
| Title | |
| FirstName | |
| Surname | |
| Telephone | Properties |
| Address | Delete |
| Line1 | View Compulsory Properties |
| Line2 | View Database Column Name |
| Line3 | Assign Searchable Properties Maintenance |
| Line4 | Assign Help for this control |
| Line5 | Rename Control |
| Line6 | |
| Destanda I | |

Picking up an existing CRM Prefix

To reuse an existing CRM table prefix, together with all associated customer data:

- Pick up the CRM icon ⁴⁴/₄ from the CRM toolbar in the Campaign Editor.
- Place it into the callflow and give it a short descriptive name.
- Double click on the CRM section and add a name for the CRM Runner control.
- Right click on the control, select **Properties** from the drop down menu
- In the Properties window **select the required prefix** from the drop down window.
- Next, tick the CRM fields that should be displayed when taking calls.



The CRM Control Gallery

Available Noetica controls can be activated or deactivated in the CRM **Control Gallery.** Only controls that are activated can be added to the CRM table.

• Open the CRM Control Gallery via the *More Tools* option on the CRM toolbar in the Campaign Editor.

The CRM Gallery window displays a list of available controls.

| 🛃 CRM Gallery | | |
|---------------------------------|---------------------------------|--|
| List of available controls | Control appearance | |
| DBComboboxControl | Hana | (add a local data and a |
| Noetica Address Control | | OIK. |
| Noetica AFDAddress Control | 1 | |
| Noetica CheckBox Control | | |
| Noetica DateOfBirth Control | | |
| Noetica Edit Control | | |
| Noetica Media Control | 1 | |
| Noetica Name Control | | |
| Noetica Payment Control | | |
| Noetica Radio Control | | |
| Noetica ReferenceNumber Control | | |
| Noetica Telephone Control | | |
| Noetica Text Control | | |
| | Available D | B Properties |
| | Name | Туре |
| | Number1 | l elephone Telephone |
| | Numberz | relephone |
| | | |
| | | |
| | | |
| | specify property type | |
| | Force to appear as control at s | earch mode |
| | Properties | Maintenance |
| | ОК | Cancel |

To activate a Noetica control in the CRM:

- Double click on the desired control so that is displayed in **Bold** print and then click OK.
- To remove the control again, double click on it once more.



To enable CTI Auto Search, the available DB properties for the Noetica Telephone control are set to Telephone in the Type column.

To display the customer's name when parking/un-parking a call, the available DB property for the Noetica Name control is set to Name.



CRM DATA IMPORT WIZARD

The *CRM Import Wizard* provides a step-by-step guide to importing your customer records from a csv file.

Select *Campaigns* under the **Setup** heading of the Synthesys main screen and open the campaign that contains the CRM to be used for the import.

- In the Campaign Editor click the Import CRM ⁴⁴ icon on the CRM toolbar.
- Locate and open the file with the relevant customer data via the **Select** *file to import customer data* window.
- Click *Next*> in the introductory screen of the CRM Import Wizard to move to the next window, to select the type of file that you wish to import.

To import a comma- separated file, select the comma as the 'Field delimiter'.

| CRM Import Wizard | × | |
|----------------------------|--|---|
| Select File Format Options | | |
| 2 AR | File contains column headers Text string identifier: | If your file contains column headings, tick the 'File contains column headers' box. |
| | A selection of the data to be imported is displayed below: Mrs.Freddy.Fry,121 3333, ,12 | Select the comma to import a comma-separated (.csv) file. |
| | < <u>B</u> ack <u>N</u> ext > Cancel | |

In the next page of the Wizard:

• Select the **CRM prefix** to be used for the import from the drop down menu, then click *Next>* to move to the next page of the Wizard

| CRM Import Wizard Select a Customer Prefix | × |
|---|-------------------------------------|
| | |
| | < <u>B</u> ack <u>N</u> ext> Cancel |



In the *Check the preview data* window of the wizard you can preview your file columns and database fields.

| RM Import Wizard | | | × | |
|--|---|---|---|--|
| Check the preview data be and use the arrow to move | low the order of the databa | se fields if required | | Use the arrow tabs to move the |
| Column headers or data: | Database fields: Title FirstName Surname Telephone Line1 Line2 Line3 Line4 | | | selected database fields up or down to match the data columns in your file with those in the CRM control. |
| Mrs Freddy F 121 3333 | 12 West Way 3 East Lane | Battersea N N London Tower Ha N N London ▶ Back <u>N</u> ext > Can | | Place a tick into the box, if you are importing customer data containing customer ID's. |

In the *Database Update Option* window of the *CRM Import Wizard* you can choose to import the customer data immediately or schedule a CRM data import at a later stage in the Campaign Manager.

Importing CRM Data Immediately

To import the customer data immediately:

• Tick the **Import Now** option.



- Click *Next>* to move to the last page of the CRM Import Wizard, which provides a summary of all your selections.
- To import the customer data click *Finish*.

If you need to make any changes, click < Back until you reach the relevant window.



Scheduling a CRM Data Import

If you wish to run the customer data import at a later stage:

- Select the option **Schedule later in the Campaign Manager** in the Database Update Option window of the CRM Import Wizard.
- Make a note of the file path, as you need this, when scheduling the data import in the Campaign Manager.

| Do you wish to run the import now? |
|------------------------------------|
| C Import now |
| Schedule later in Campaign Manager |
| \\DWL32\SYNTHESYS\Reports\CRM |
| |
| |

• Click *Next>* to move to the last window of the CRM Import Wizard, which provides a summary of all your selections and then click *Finish*.

Set-up in the Campaign Manager

CRM data imports can be scheduled in the *Campaign Manager*, which is accessed via the *Reports* module under the **Setup** heading in the Synthesys main screen.

| 🖄 Campaign Manager | |
|---|--|
| File View Help | |
| | |
| Image: Solution of the set of the | Select your campaign, click <i>Add Report</i> and using <i>Browse</i> <i>Reports</i> , select the File path for your import. Copy the file path into the <i>Printer/ Export</i> <i>File Name</i> field. |
| I | And State of Contract of Contr |

- Ensure that the CRM Import Service option has been selected as the Report Tool.
- Click Add Schedule to set up the frequency for your CRM data Import.



CRM IMPORT LOG FILES

Stages of CRM Fast Import

CRM Fast Import, when importing data with customer ID, has the following stages:

Sorting stage.

At this stage the Import sorts all records in descending order, considering each record as a whole string.

Bulk Copy stage or Initial Load stage

At this stage the Import detects that the table is empty and initially loads all the records. Files without a primary key are handled at this stage as well. Differentiating stage

At this stage the Import compares all records in the file with records in the table. It skips records that are compared and selects records that are not compared. If a record with a primary key exists it is added into filename.csv.update.txt file. If a record with a primary key is absent it is added to filename.csv.insert.txt file. Differentiate Bulk Copy stage or Insert stage

At this stage the Import handles filename.csv.insert.txt

Differentiate Update stage or Update stage

At this stage the Import handles filename.csv.update.txt

CRM Fast Import creates the following files:

In our example, we are importing customer data from a csv file called VoucherID. When importing data with customer ID, the following Import files are created:

VoucherID.log

The file VoucherID.log contains summary information of the Import operation result for the VoucherID.csv'file. For example:

Customers Updated: 0, Customers Inserted: 30, Customers Ignored: 0, Customers Failed: 4, Total Customers: 34, Log File: C:\Documents and Settings\Brigitte\Desktop\Import\VoucherID.log

VoucherID.csv.sorted.txt

The file VoucherID.csv.sorted.txt contains <u>all</u> records of the 'VoucherID.csv' that you were trying to import.

VoucherID.csv.insert.txt

The file VoucherID.csv.insert.txt contains <u>all new</u> records to be inserted, i.e. data to be added to an existing CRM.

VoucherID.csv.update.txt

The file VoucherID.csv.update.txt contains all existing CRM records that have been updated.



VoucherID.csv.log.txt

The file VoucherID.csv.log.txt contains information about the <u>reason why</u> the <u>failed</u> <u>records</u> of the 'VoucherID.csv'file could not be imported. In our example the data for the CRM field P018 (representing the postcode) was too long.

2005-04-25 11:02:25: ----- Import started -----2005-04-25 11:02:25: Sorting ... 2005-04-25 11:02:25: Sorted ... 2005-04-25 11:02:25: BulkCoping ... 2005-04-25 11:02:25: Dropping Keys ... 2005-04-25 11:02:25: Dropped Keys ... Field P018 value (SW12 2 ER) is too long. See C:\Documents and Settings\Brigitte\Desktop\Import\VoucherID.csv.log.BulkCopy.txt for invalid lines

Field P018 value (BR12 2 ER) is too long. See C:\Documents and Settings\Brigitte\Desktop\Import\VoucherID.csv.log.BulkCopy.txt for invalid lines

Field P018 value (SW12 2 ER) is too long. See C:\Documents and Settings\Brigitte\Desktop\Import\VoucherID.csv.log.BulkCopy.txt for invalid lines

Field P018 value (SW12 2 ER) is too long. See C:\Documents and Settings\Brigitte\Desktop\Import\VoucherID.csv.log.BulkCopy.txt for invalid lines

2005-04-25 11:02:35: BulkCopied ... 2005-04-25 11:02:35: Creating Keys ... 2005-04-25 11:02:35: Created Keys ... 2005-04-25 11:02:35: ----- Import finished successfully -----

VoucherID.csv.log.BulkCopy.txt

The file VoucherID.csv.log.BulkCopy.txt. contains all <u>failed records</u> from the 'VoucherID.csv' that you were trying to import. You can use this file to correct the records as required and then import them again.

VOUCIM_1,Mr,John,Smith,,001 234 4444,Flat 12 ,Kingston Rd,Kingston,London,SW12 2 ER,John.Smith@samsons.com VOUCIM_20,Mr,Justin,Seals,012 234 1111,001 234 3333,Flat 121 ,Beaver Rd,,Bristol,BR12 2 ER,J.S@samsons.com VOUCIM_27,Mr,Jeffry,Simons,012 010 4333,222 014 4333,Flat 123 ,Kingston Rd,Kingston,London,SW12 2 ER,JS@samsons.com VOUCIM_8,Mr,Jason,Smyth,012 234 4333,222 234 4333,Flat 123 ,Kingston Rd,Kingston,London,SW12 2 ER,JS@samsons.com



Differentiate.txt Files

The Differentiate.txt files are created when inserting new records or updating an existing CRM. The examples below are again based on importing customer data from a csv file called 'VoucherID'.

VoucherID.csv.log.Differentiate.txt

The VoucherID.csv.log.Differentiate.txt file contains records that failed when inserting records or updating an existing CRM, for example because the Customer ID was blank or the number of fields of the record were invalid.

VoucherID.csv.log.DifferentiateUpdate.txt

The file VoucherID.csv.log.DifferentiateUpdate.txt contains all records that failed when updating an existing CRM. You can use this file to correct the records as required and then import them again.

VoucherID.csv.log.DifferentiateBulkCopy.txt

The file 'VoucherID.csv.log.DifferentiateBulkCopy.txt' contains all records that failed when inserting new records into an existing CRM. You can use this file to correct the records as required and then import them again.



CRM DATA EXPORT WIZARD

The *CRM Export Wizard*, which is accessed via the *Campaigns* module under the **Setup** heading of the Synthesys main screen, provides a step-by-step guide to exporting your customer records to a csv file.

In the *Campaign Editor, select* and open the campaign that contains the CRM to be used for the export.

- Click the *Export CRM* icon on the CRM toolbar.
- In the **Select file to import customer data** window select the path and enter the file name for your customer data export.
- Select the **CRM prefix** for the customer data that you wish to export in the *Select a Customer Prefix* window of the wizard.



 Move to the Next> page of the CRM Export Wizard choose whether or not to include column headings and to select the format for exporting the customer data.

| | File contains column headers Text string identifier: Field delimiter: | - | |
|--|---|-------|--|
|--|---|-------|--|

The last window of the CRM Export Wizard provides a summary of your selections.

Click *Finish* to export the customer data or *Back* if you need to make any changes.



CRM DATA UPDATE, USING THE EXPORT WIZARD

The **Synthesys Export Wizard** allows data from a Synthesys call to be formatted as necessary and exported to an external data source, for example, a database table or as a comma separated file.

The Synthesys Export Wizard can also be used to update a CRM, with data collected during a call. The wizard generates a file, which is then used to reproduce the export as many times as required in much the same way as reports are generated.

The **Synthesys Export Wizard** is available from the Campaign Manager, which is opened by clicking on **Reports** under the **Setup** heading of the Synthesys main screen.

Setting up a CRM Update

To update CRM data using the *Synthesys Export Wizard* the following steps are required:

- In the *Campaign Editor* add the required fields to your **CRM**, so that the information can be entered and updated when the Export is run.
- Before creating the Export, make a note of your CRM Prefix and the CRM section name.
- In SQL- Phoenix, check the CRM column names and associated codes of the fields that you wish to update (i.e. Log Number = P017).
- In the *Reports* module under the **Setup** heading of the Synthesys main screen set your export using the *Export Wizard* in the Campaign Manager.

For more detailed information about creating Exports, please refer to the notes on the Export Wizard in the Creating & Managing Reports section.



CRM & EXTERNAL DATABASE LINK

The CRM can be linked to external database tables using the **Data Source option** in the **right-hand window of the Customer Designer**.



To use the External Data Source option, a DSN name needs to be set up on the server and Noetica will need to add an entry to the CCS_Interfaces table, with the Interface Alias being unique.

The CRM has 'read only' access to the external tables and therefore records cannot be modified, added or deleted from the mapped customer.

| Customer Designer | | | |
|-------------------|---------|--------------------------|-----------------------------|
| ree | | Properties | |
| Customer Details | | Prefix- | |
| | | Customer is not represen | ited by any external table. |
| | | External | Tables |
| | | Data 9 | Source: |
| | | | |
| Prefixes | Save As | Save | Cancel |



Selecting External Data Sources

• Click the **Data Source** button to display the available DB source or a list of available DB sources if more than one external source exists.

| 💑 Customer Designer | | | |
|---------------------|---------|--|----------------------------|
| Tree | | Properties | |
| Customer Details | | Prefix AHA Customer is not represent External CCCS_CON | Ned by any external table. |
| | | | Data Source |
| Prefixes | Save As | Save | Cancel |

On selecting the required DB source, the **External Tables** button will be enabled.

| 💑 Customer Designer | | | | × |
|---------------------|-----------|---|-----------------------------|-----------------|
| Tree | | Properties | | |
| Customer Details | | Prefix AHA | | |
| | | Customer is not represe Externa | nted by any external table. | |
| | | <ccs_cc< th=""><th>M_MSSQL></th><th>External Tables</th></ccs_cc<> | M_MSSQL> | External Tables |
| | | | | |
| | | | | |
| | | | | |
| Prafivas | Cauge Ac. | Sava | 1 Caucal | |

- Click the External Tables button to open the Select Table dialog.
- Locate the desired table from the drop down list and click **Select**.

| Select Table | | | Select | Cancel | Select the desired |
|--|---|--|--|--|---|
| DB name AccountNme AccountNo BankNme Branch ID SortCode TheatreID | DB type varchar varchar varchar int varchar int | DB size 50 50 50 50 4 50 4 4 | CRM name None None None None None None None | CRM type String String String Numerical String Numerical | all available tables The selected table now represents your <i>Main Customer</i> table. |



Binding Customer ID to External Table Column

To start up the **Bind Customer ID** dialog:

- Select **Customer ID** in the CRM Design table and click the **Bind to table column** button on the right hand side.
- In the *Bind Customer ID* window, select the column to be handled as Customer ID.

| | | | Properties | | |
|---|--------------------------------------|---------------------|---|--|---------------|
| Customer Details | | | % | | |
| | | | Please assi | gn Customer ID to a column. | |
| | | | Bir | nd to table column | |
| nd Customer ID | | | · | | |
| | | | | | |
| DB name | DB type | DB si. | CBM name | CRM type | |
| X AccountNo | varchar | 50 | None | String | |
| | | | | | 1 141 142 143 |
| 🔀 BankNme | varchar | 50 | None | String | |
| 🗙 BankNme 🗙 Branch | varchar varchar | 50 50 | None None | String String | |
| X BankNme X Branch X CustID | varchar varchar varchar | 50 50 50 | None None None | String String String | |
| BankNme Branch CustID | varchar varchar varchar int | 50 50 50 4 | None None None None | String String String Numerical | |
| BankNme Branch CustID | varchar varchar varchar int | 50 50 50 4 | None None None None | String String String Numerical | |
| BankNme Branch CustID | varchar varchar varchar int | 50 50 50 4 | None None None None Adjust CRM Type | String String String Numerical | × |
| BankNme Branch CustD D CRM Property Name ID | varchar varchar varchar int | 50 50 4 | None None None Adjust CRM Type | String String String Numerical Numerical | • • |

In our example, we have linked Customer ID to the 'ID' column in our DB table.

Adding Properties

- To add a table property to your CRM double click **New..** in the Tree of the Customer Designer.
- From the table displayed, select the required column ('DB name' column) and click OK or simply double click on the property name.
- Use the *CRM Property Name* field to define a different name for the column in the CRM tree.
- Adjust the CRM Type as required, i.e. select 'Telephone' for a telephone number

| 💑 Customer Designer | | | | _ 🗆 × |
|----------------------|---------|-------|------------------------|-----------|
| Tree | | Prop | erties | |
| 🖃 📹 Customer Details | | | | |
| | | | | |
| AccountNme | | | | |
| AccountNo | | | | |
| S BankNme | | | | |
| Branch | | | | |
| New | | | | × |
| DB name | DB type | DB si | CRM name | CRM type |
| 🗸 AccountNo | varchar | 50 | AccountNo | String |
| 🗸 BankNme | varchar | 50 | BankNme | String |
| 🖌 🖌 Branch | varchar | 50 | Branch | String |
| 🖌 🗸 ID | int | 4 | ID | Numerical |
| 🗙 SortCode | varchar | 50 | None | String |
| Thereits | : | | KI | Minimut I |
| CBM Property Name | | | Adjust CRM Type String | • |
| SortCode | | | reset OK | Cancel |
| 1 IOINOS | Jave As | | Jave | Cancer |



Adding a Group

To add a group table:

- Double click New.. in the CRM Design Table.
- Tick **Insert Group** in the window now displayed, enter a CRM Property name and click OK.

| N | ew | | | | | | × |
|---|---------------------------------|---------|-------|-----------------|-----------|-----------|----------|
| | 🔽 Insert Group | | | | | | |
| | DB name | DB type | DB si | CRM name | | CRM type | |
| | V AccountNme | varchar | 50 | AccountNme | | String | |
| | V AccountNo | varchar | 50 | AccountNo | | String | |
| | 🗸 BankNme | varchar | 50 | BankNme | | String | |
| | 🗸 Branch | varchar | 50 | Branch | | String | |
| | V ID | int | 4 | ID | | Numerical | _ |
| | l 🖉 ettertat | | 50 | 014014- | | outra - | _ |
| | | | | Adjust CRM Type | Numerical | | ~ |
| | CRM Property Name Employment | | | reset | OK | Ca | ancel |

Selecting External Data Sources for a Group

On selecting the group item you will see three buttons in the properties window on the right: **External Tables, Main Table Link** and **Depending Table Link**.

• Click the **External Tables** button on the right hand side to open the **Select Table** Dialog and select the desired table.

Tables already used will no longer appear in the list.





Binding a Group

The Main Customer table or subsequent parent group table now need to be linked to the newly added tables.

- Click Main Table Link to select a binding column in the Main Customer table
- Click **Depending Table Link** to select a binding column in the newly added table.



Before releasing your CRM table, check that you have created a link for the **Customer ID**, the Main Table and subsequent Group tables.

Settings & Customisation

Having created and released your CRM table:

- Go to Properties of the CRM.
- In **Settings** select your CRM prefix, if not displayed automatically and tick the **Tab headings** that should be displayed in 'Take Calls'.
- Use the **Search, Insert, Modify and Result** buttons respectively and tick the fields in the CRM table that you wish to display to the agent in 'Take Calls'.



The **New** and **Modify** buttons are disabled, as the CRM has **read only** access to the external tables.

Records cannot be modified, added or deleted from the mapped customer.



CRM MAINTENANCE

Selected CRM history events and unused CRM prefixes can be deleted in the *Campaign Editor*, which is opened selecting *Campaigns* under the **Setup** heading of the Synthesys main screen.

CRM History Cleanup

To clean up CRM history events open a campaign and in the Campaign Editor.

- Expand the *More Tools* ²/₂ option of the *CRM toolbar*.
- Click the *History Cleanup* icon.

In the *CRM History Cleanup* dialog select the *CRM prefixes*, the *date range* and the *specific history events* that you wish to delete.

| CRM History Clea | nUp | | |
|------------------|-----------------|-------------------------------------|----------------------|
| | | | |
| | | | |
| | | | |
| | | | |
| Prefix | | | |
| ADAM2 | B100 | 🗂 BEE | 🗍 BP |
| 🗂 AJTEN | B2R708 | BFILE2 | 🗍 BR708 |
| AJTEN2 | 🗍 B3278 | 🗒 BFSQI | 🗍 BRDTQ |
| AJTEN3 | 🗍 BADR | 🗍 BG3332 | BRETST |
| ANT CO | BCA4 | BHELP1 | BRFILE |
| | BCA41 | U BJAFSQ | BRFLAT |
| | | L BJASQI | BRESQI |
| L] MOTOZ | | 0,000 | V DRIET |
| • | | | Þ |
| After | | Before | |
| | | | 10.000¢.0¢.0¢ |
| II♥ August 09, | 2006 06:06 | | • 10, 2006 06:06 • |
| Event Types | | | |
| 🗍 Bulk OB | 🗍 Cu: | stomer Details Altered | 🗍 Note |
| CallDeleted | 🗍 Cu: | stomer Structure Altere | d 📋 O/B Call |
| CallQueued | 🗋 Cu: | stomer Structure Create | ed 📋 O/B Call Failed |
| CallRescheduled | i 🗍 Do | cument | 🗍 OBManager Chang |
| | □ I/B | Call | |
| CallSiept | ✓ I/B | Call Failed | Predictive Dialler |
| Customer Delete | unt∟ ad Diva | ouri Customer « Customer Created | SOT Oueue Recut |
| | | w customer Createu | |
| • | | | • |
| | | | 1 |
| | | Delete Events | Cancel |
| | | | |

| Prefix | In the CRM History Cleanup dialog tick the CRM prefixes for the history |
|--------|---|
| | events to be deleted. |

- After / Before Select the date range (After Before) for the history events to be deleted.
- **Event Types** Tick each event that you want to delete from the history of the selected CRM prefixes.

Clicking the **Delete Events** button will delete the selected history events. Clicking *Cancel* will close the *CRM History Cleanup* dialog without deleting history events.



CRM Delete Prefix

To delete CRM prefixes:

- Expand the **More Tools** A option of the **CRM toolbar** in the *Campaign Editor*.
- Click the Delete Prefixes 🔯 icon.

In the *CRM Delete Prefix* dialog place a tick into any of the check boxes next to the CRM prefixes that you wish to delete.

| APPLE AUTO AUTO2 B100 B2R708 B3278 BADR BCA4 BCA4T BCA4T | BF5QI BG3332 BHELP1 BJAF5Q BJA5QI BOB BP BR708 BRDTQ | | BRZZ5 BTW C1915 C2059 C2059B C2059C C2059W C2059W C2059W C20370 C23370 C3370 | |
|--|--|-----------------------------------|--|--|
|] BCRMIM] BCRMIM] BEE] BFILE2 | BRFILE BRFLAT BRFSQI | DBRZZ2 BRZZ2 BRZZ3 BRZZ4 | CA111 CA111 CA1111 CA14464 | |

- Click the **Delete Prefix(es)** button, to delete the selected CRM prefixes.
- Click **Cancel**, to close the *CRM Delete Prefixes* dialog, without deleting the selected CRM prefixes.



CRM prefixes that are still used in a campaign can't be deleted.

A message will be displayed informing you that the CRM must be removed from the campaign first, before you can delete the prefix.



TAKING A TEST CALLS ON THE CRM

Use the TestCallflow <a> icon to run a test call in the Campaign editor.

The CRM will be displayed together with the appropriate Agent dialogue. The exact appearance of the control will depend on how the CRM has been configured.

| Tele Calify Custom Help Start Nett Start Nett< | a AAA . | | BR July09 - F | Product Order Line - Syn | nthesys | | | _ = X |
|---|------------------------|-------------------------------------|---|--------------------------|----------------------------------|----------------------------|----------------------|-----------|
| Customer ID [not null] Abore Itele Itel | Take Calls Custom | Help | | | | | | Style 👻 🕜 |
| Sood Afternoon May I take your surname please? d I surname I Customer ID [not null] ABORT_4 Name I Title Mr FirstName Joe Surname Bloggs Telephone 1234567890 Address I Line1 Apt 11 Line2 12 West Way Line3 London Line4 I Line5 I PostCode SW11 | Open Log Abort Next E | nd Cal Next Rotas Tracker Action | & Search & New Customer Details Custo | Customer History | Dial Get Next Customer Record | Call Diary Telephony | Transfer Park Unpark | |
| Statomer Customer ID [not null] ABORT_4 | Good Afternoon May | l take your surnar | ne please? | | | | | |
| Customer (D [not null] ABORT_4 Name | 'ustomer | | | | | | | 4 b |
| Custome ID [not null] ABORT_4 Name | | | | | | | | |
| Name Title Mr FirstName Joe Surname Blogss Telephone 1234567890 Address | Customer ID [not null] | ABORT_4 | | | | | | |
| Title //r FirstName Joe Surname Bloggs Telephone 1234567890 Address | Name | | | | | | | |
| FirstName Joe Sumare Bloggs Telephone 124567890 Address | Title | Mr | | | | | | |
| Sumame Bloggs Telephone 1234567890 Address | FirstName | Joe | | | | | | |
| Telephone 1234567890 Address | Surname | Bloggs | | - | | | | |
| Address Line1 Apt 11 Line2 12 West Way Line3 London Line4 | Telephone | 1234567890 | | - | | | | |
| Line1 Apt 11 Line2 12 West Way Line3 London Line4 Line5 London PostCode SW11 | Address | , | | | | | | |
| Line2 12 West Way Line3 London Line4 Line5 Line6 PostCode SW11 | Líne1 | Apt 11 | | - | | | | |
| Line3 London Line4 Line5 Line6 Superstand Su | Line2 | 12 West Way | | - | | | | |
| Line4 Line5 Line6 PostCode SW11 | Line3 | London | | - | | | | |
| Line5 Code SW11 | Line4 | | | | | | | |
| Lines SW11 | LineE | | | - | | | | |
| PostCode SW11 | Lines | | | _ | | | | |
| PostCode SW11 | Lines | | | | | | | |
| | PostCode | SW11 | | | | | | |
| | | | | | | | | |
| | | | | | | | | - |

Any of the options below that have been ticked in the CRM Properties page can be accessed via the corresponding icons:

| Option | Used To |
|--------|---|
| 3 | Search. Enables the search for existing customer details. |
| 2 | New. Add a new customer. |
| 2 | Modify. Allows the modification of existing customer details. |
| 2 | Details. Display customer details. |
| 2 | Notes. Display and add information related to the customer. |
| 2 | History. Access information of a customer's previous contact with the company and attach notes and documents associated with the selected customer |

Please see next page for more information about attaching notes and documents.



Attaching Notes to a CRM Record

In some cases callflow designers may wish to attach notes or documents to a selected customer's CRM history, which than can be accessed and edited by agents when running a live call.

- To attach a note, click the Notes icon on the Customer toolbar in the agent view.
- In the *History Notes* dialog subsequently displayed click on *Create Note,* to enable the text box.

| Name | | | | |
|-------------|---------------|--------------|-----------------|--|
| Title | Prof | History Note | s [ELECT:ELECT_ | 1] |
| Surname | Harries | Date | Time | Operator Note |
| Address | | | | History Notes [ELECT:ELECT_1] |
| Line1 | 10 Richmond H | | | Important Note associated with the selected customer |
| Line2 | Luton | | | |
| Line3 | Beds | | | |
| PostCode | LU2 7JG | | | |
| Telephone | | | | |
| Number1 | | | | |
| CheckBox | | | | |
| ChoicesMade | Gold | | | E Washing Countries Countries |
| | | | | savenute Californite |
| | | | | Create Note |
| | | | | 1 |

• Add the note associated with the selected customer into the text box and then click the *Save Note* button to display the note.

| | | | | | - |
|------------------|---------------|-------------------|-------------|----------|--|
| Name | | | | | |
| Title | Prof | History Notes [EL | ECT:ELECT_1 |] | |
| Surname | Harries | Date | Time | Operator | Note |
| Address Line1 | 10 Richmond H | 06/08/2009 | 18:18:46 | Brigitte | Important Note associated with the selected customer |
| Line2 | Luton | | | | |
| Line3 | Beds | | | | |
| PostCode | LU2 7JG | | | | |
| Telephone | | | | | |
| Number1 | | | | | |
| CheckBox | | | | | |
| ChoicesMade | Gold | | | | |
| | | | | | |
| | | | | | Create Note |



If **auto pop notes** are enabled, the CRM notes page will open automatically together with the CRM customer record, when running a live call.

To open a note manually, click on the CRM Notes icon on the Customer toolbar.



Attaching a Document to a CRM Record

To attach a **document**, click on the **History** icon and then the **'Attach..'** tab.

In the **Open File dialogue**, you can browse for the document to attach to the customer's record.



The document that you wish to attach has to be accessible on a **Network Shared Directory**.

| F) (2) + | BR July09 - Product Order Line | - Synthesys = = X | |
|--------------------------------|--|---|--------|
| Take Calls Custom Help | | Style * 😧 | |
| Open Log Abort Next End Call | Next Rotas Action Customer Hist Action Details | story b Dial Get Next Cal Cubtomer Record Diary Cubtomer Record | |
| Take Calls | Customer | Telephony | |
| Good Afternoon May I take | your surname please? | | |
| Customer | | 4 Þ | |
| Customer ID [not null] ABORT_4 | | - | |
| Title | History for the custome | er BRTIES_2[BRTIES] | - 01 × |
| FirstName | | | |
| Surname Bloggs | Event Event Ev | vent Operat Account Campai OBCam | |
| Telephone 1234567 | 100 🙀 Import 28/01/2 Ins | perted | |
| Address | 📕 📕 Call Q 30/01/2 Call | II 189 Brigitte | |
| Line1 Apt 11 | 🔽 🚺 🖓 I/B Call 30/01/2 Bro | ochure Brigitte | |
| Line2 12 West | way 🚺 🚺 🖓 🖓 🖓 🖓 🖓 | iquiry Brigitte | |
| Line3 London | 📕 🚺 🚺 🚺 🚺 🚺 🖉 | der Brigitte | |
| Line4 | 🔽 🥼 🖓 🖓 🖓 🖓 🖓 🖓 🖓 | der Brigitte | |
| Line5 | Call 🗘 OBMa 30/01/2 Call | II 189 Brigitte | |
| Line6 | 🔽 🚺 🗘 0/B C 02/02/2 End | iquiry Brigitte | |
| PostCode SW11 | | ote Brigitte | |
| | 🕞 OBMa 02/02/2 Cal | II 189 Brigitte | |
| | 💶 🛛 🖉 Docu 02/02/2 Tie | es.xls Brigitte | |
| | _ | | |
| | | | |
| | Add Note | Attach <u>Filter>></u> | |

To read a note or to view the content of an attached document in the CRM **History** window, select and double **click** on the associated **'note' or 'document' icon**.