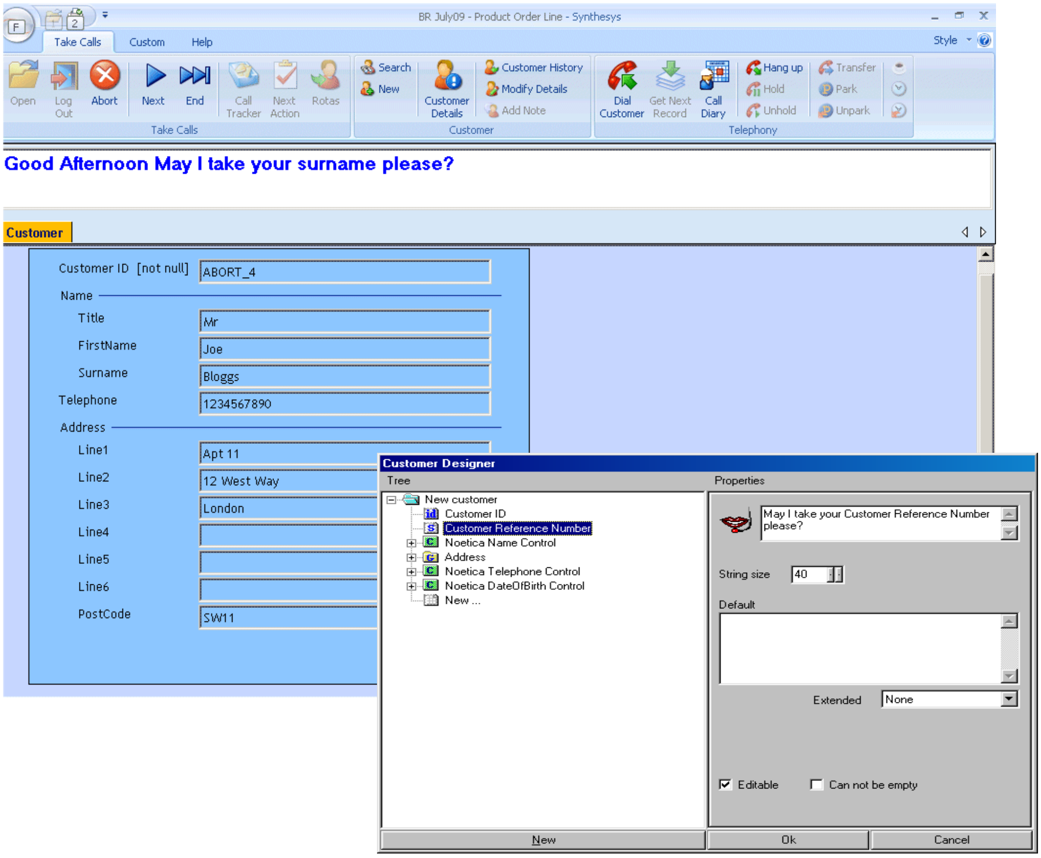
CUSTOMER RELATIONSHIP MANAGEMENT

Customer Details



CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

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.

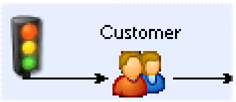
In addition to searching for customer details and viewing a customer's history agents can create new customer records following prompts in much the same way, as they would do in a normal callflow run.

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

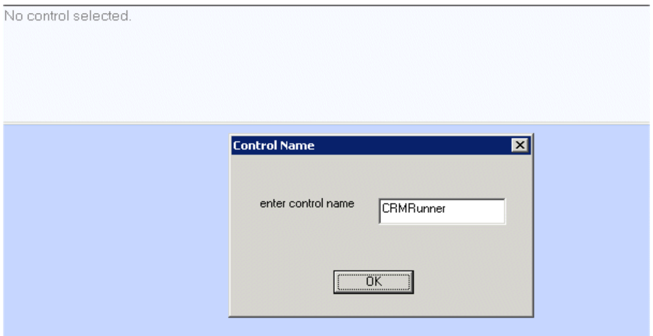
ASSIGNING CRM

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

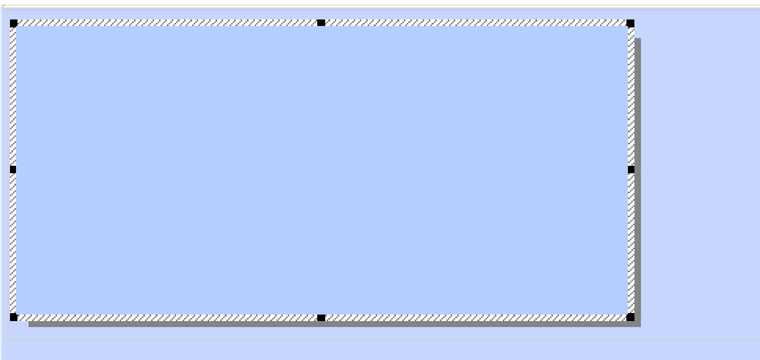
- Select ***Campaigns*** under the **Setup** heading of the Synthesys main screen and open the campaign for which you want to add the CRM.
- In the *Campaign Editor,* click your left mouse button on the CRM  icon on the ***CRM* toolbar,** to pick up the CRM**.**
- Place your cursor directly behind the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



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



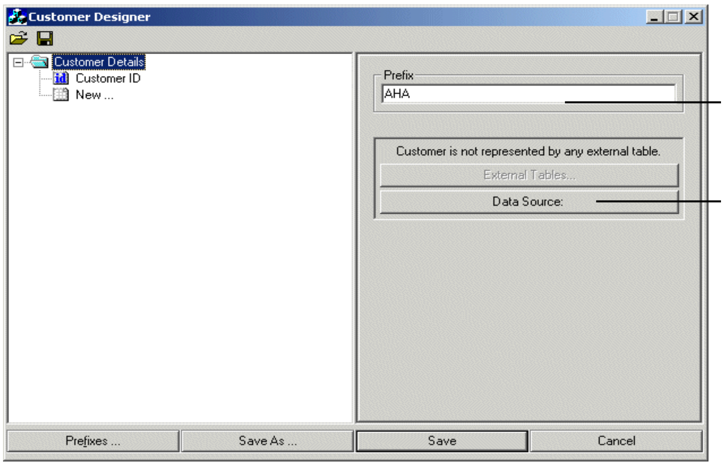
See next page for designing the CRM table.

Creating a new CRM Table

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

- Click on the Design Table  icon on the *CRM* toolbar or right click on the control and select ***Maintenance*** from the drop down menu.

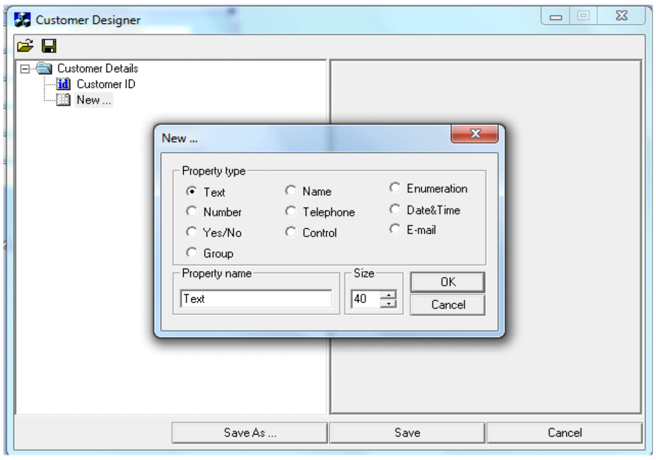
- Select *Customer Details* on the left side and enter a unique prefix into the ***Prefix*** window on the right. The prefix can contain up to 6 characters.



Enter your unique CRM Prefix

For external Data Source option, see section 'CRM & External Database Link'.

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



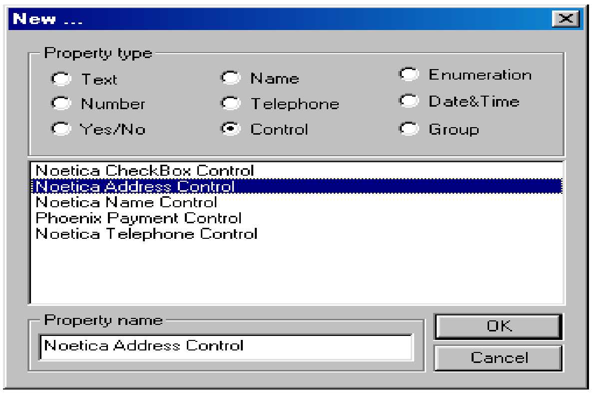
To enable CTI Auto Search you must use a Telephone field to capture the customer's telephone number and the Email option to capture the email address when using Email OB campaigns as part of your recycling rules.

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

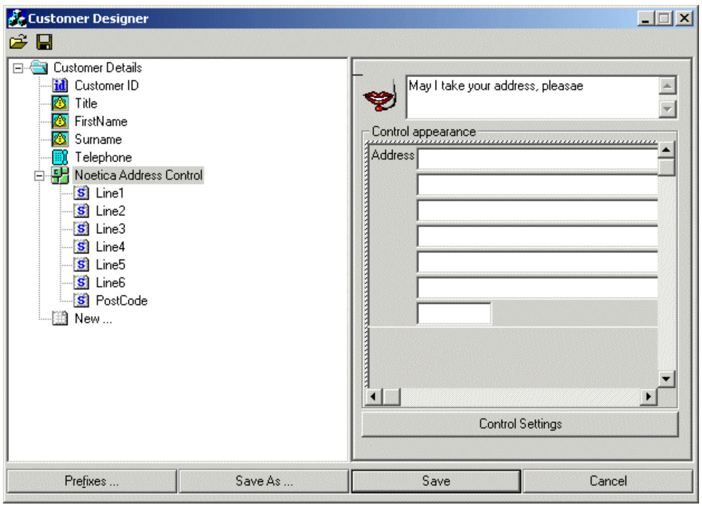
Adding a Noetica Control to your CRM

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.



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



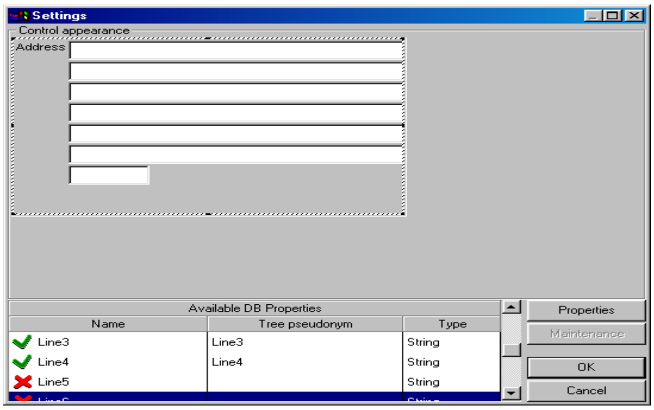
Remember to use the Telephone or Email option to capture the customer's telephone number and email address to facilitate CTI Auto Search and emails as part of advanced recycling rules.

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

Editing Noetica Controls

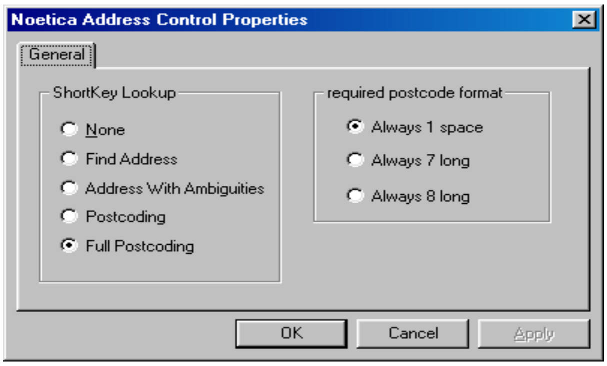
To edit the properties of a Noetica control:

- 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.



- 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.

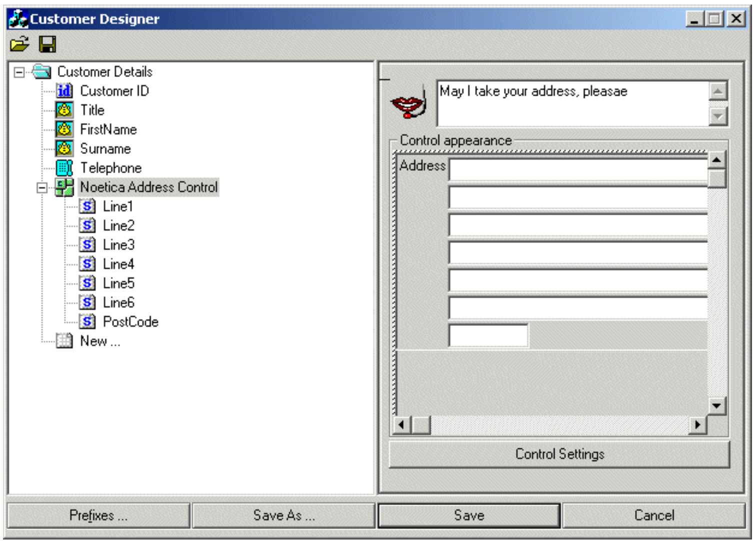


- Click OK to return to the Customer Designer window.

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***?



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.

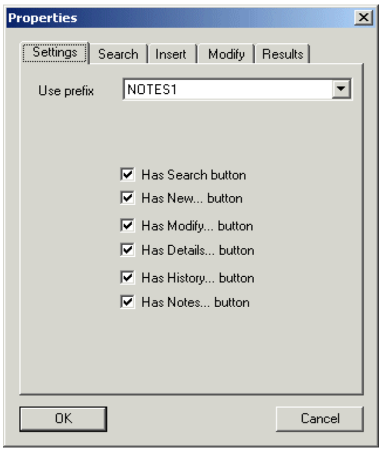
Properties: Settings & Customisation

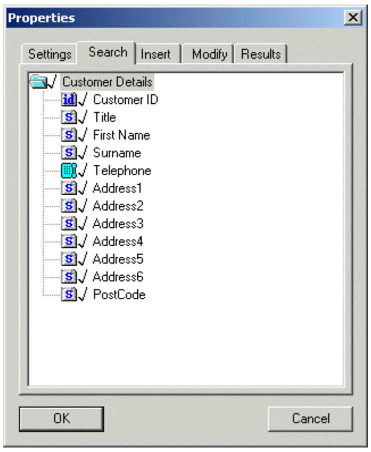
To configure the appearance of the CRM table:

- 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.





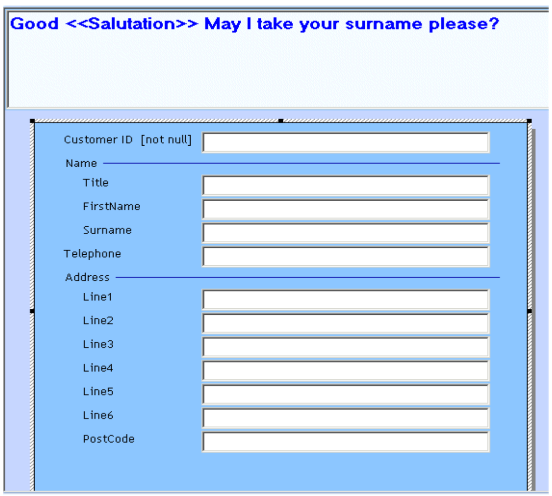
Search: Fields enabled for customer search.

Insert: Fields enabled to enter new customer details.

Modify: Fields enabled for updating customer records

Result: Fields displayed in the ambiguity list.

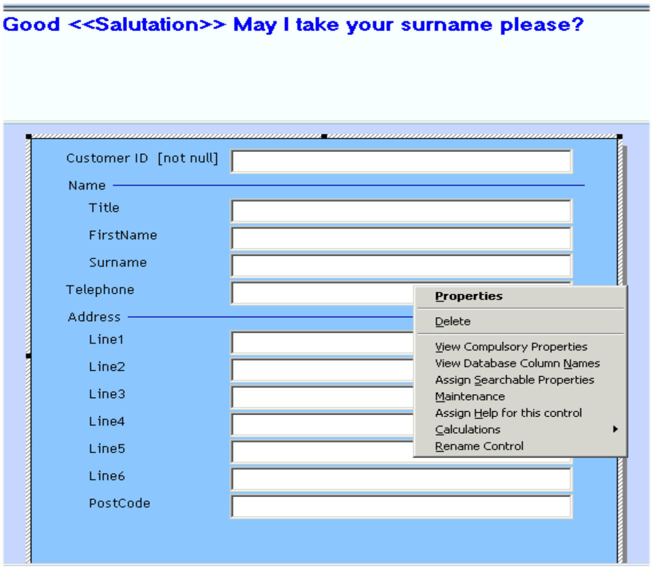
- Click OK to display your CRM.
- Enter the text for the CRM into the agent dialogue box.
- Return to the Flow View in the Campaign Editor and save and publish your callflow, before taking a call in the Agent view.



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.



Picking up an existing CRM Prefix

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

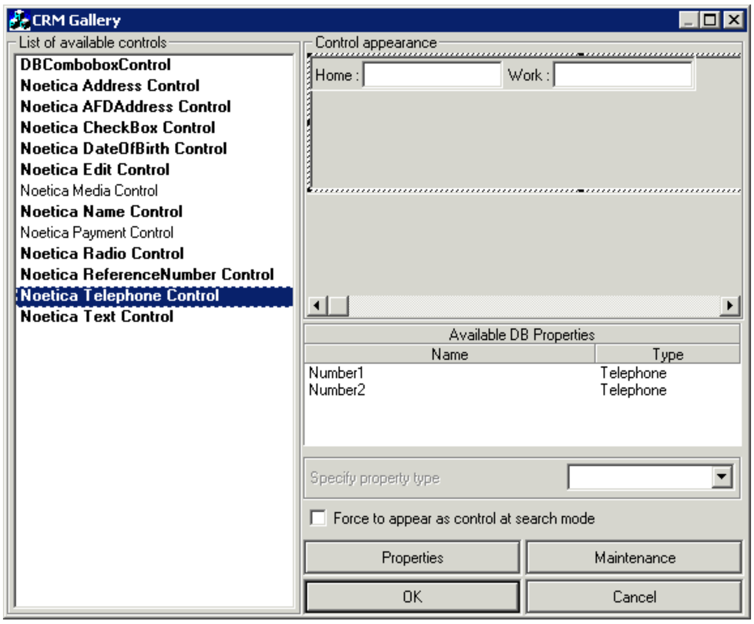
- Pick up the CRM icon  from the CRM toolbar in the Campaign Editor.
- Place it into the callflow and give it a short descriptive name.
- Double click on the CRM section and add a name for the CRM Runner control.
- Right click on the control, select **Properties** from the drop down menu
- In the Properties 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.



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.

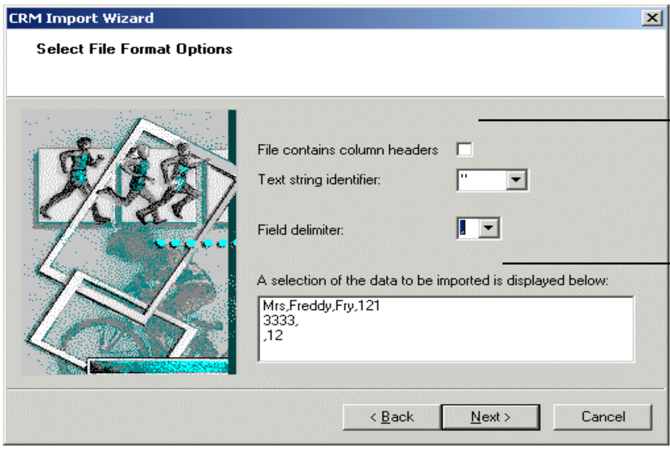
CRM DATA IMPORT WIZARD

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*** 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'.**

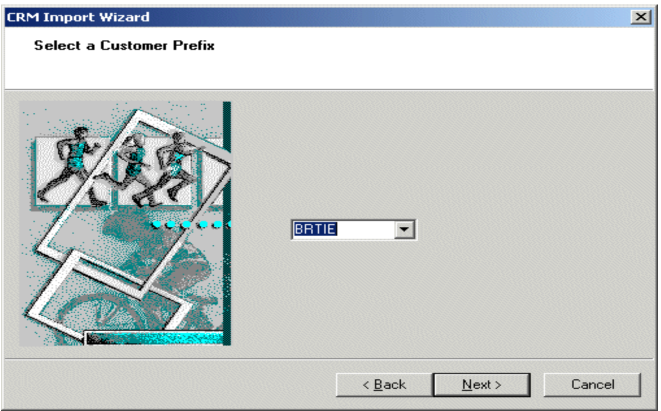


If your file contains column headings, tick the 'File contains column headers' box.

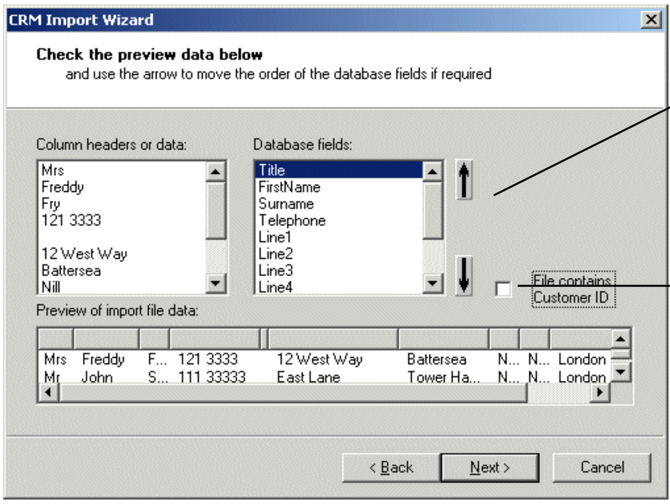
Select the comma to import a comma-separated (.csv) file.

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



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



Use the arrow tabs to move the selected database fields up or down to match the data columns in your file with those in the CRM control.

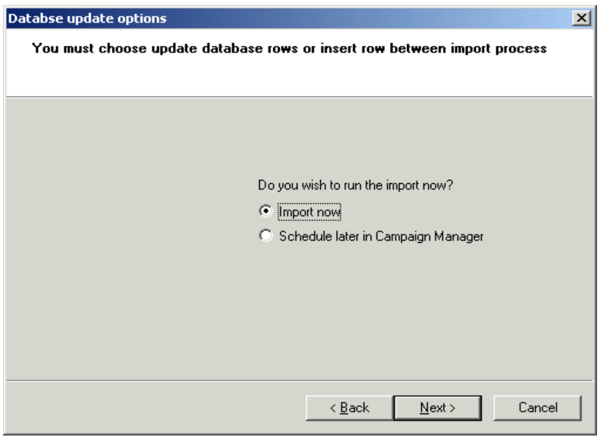
Place a tick into the box, if you are importing customer data containing customer ID's.

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***.

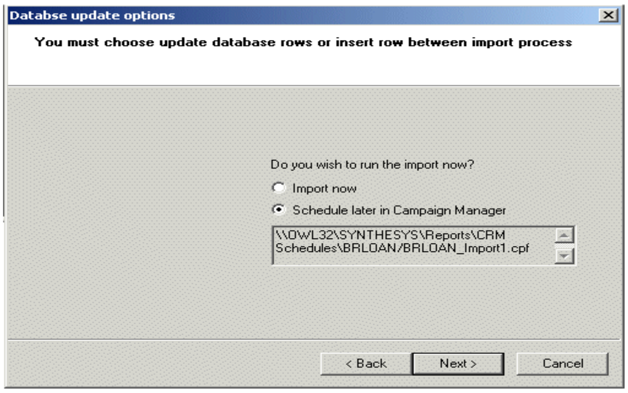
If you need to make any changes, click <Back until you reach the relevant window.

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.

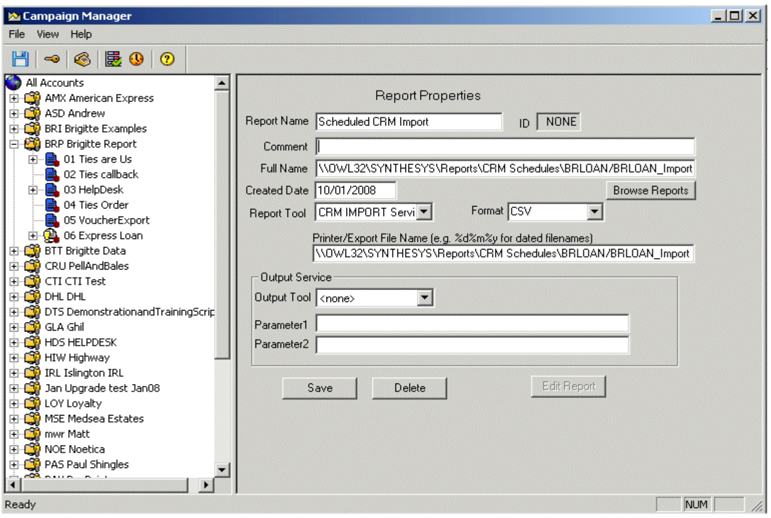
- Make a note of the file path, as you need this, when scheduling the data import in the Campaign Manager.



- 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.



Select your campaign, click ***Add Report*** and using *Browse Reports*, select the File path for your import.

Copy the file path into the ***Printer/ Export File Name*** field.

- 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 all records of the 'VoucherID.csv' that you were trying to import.

VoucherID.csv.insert.txt

The file VoucherID.csv.insert.txt contains all new 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 reason why the failed records 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 failed records 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

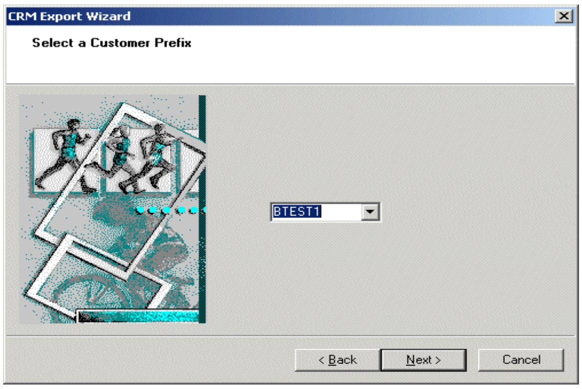
The file 'VoucherID.csv.log.DifferentiateBulkCopy.txt' contains all records that failed when inserting new records into an existing CRM. You can use this file to correct the records as required and then import them again.

CRM DATA EXPORT WIZARD

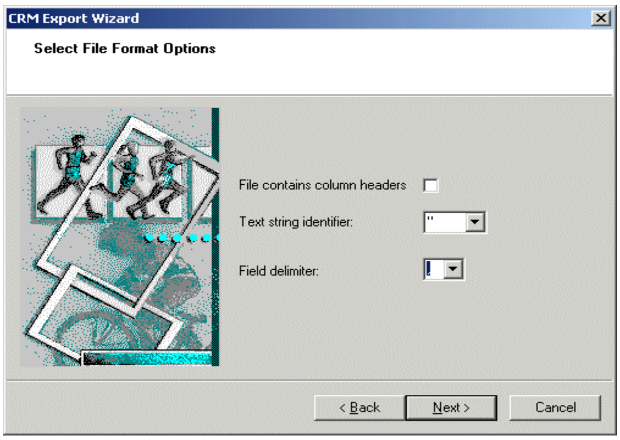
The *CRM Export Wizard*, which is accessed via the ***Campaigns*** module under the **Setup** heading of the Synthesys main screen, provides a step-by-step guide to exporting your customer records to a csv file.

In the *Campaign Editor, s*elect 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.



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.

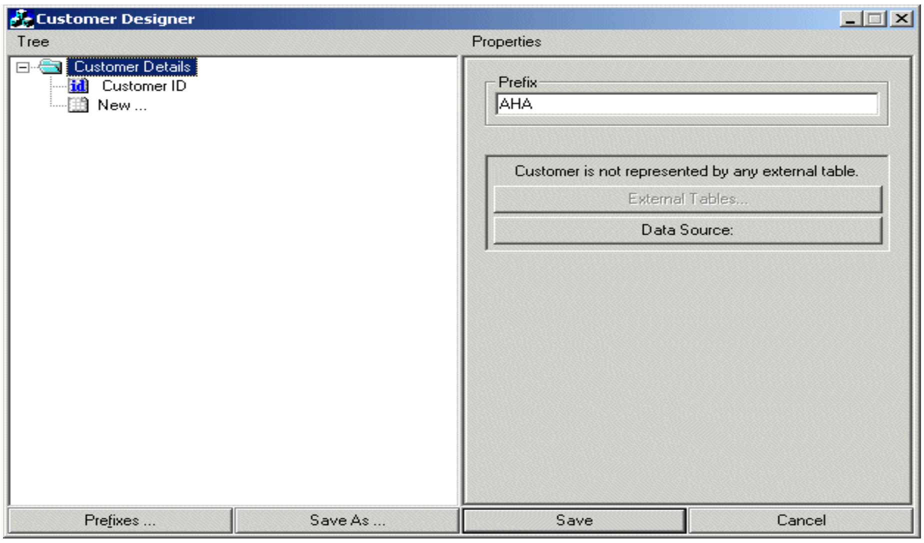
For more detailed information about creating Exports, please refer to the notes on the Export Wizard in the Creating & Managing Reports section.

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**.

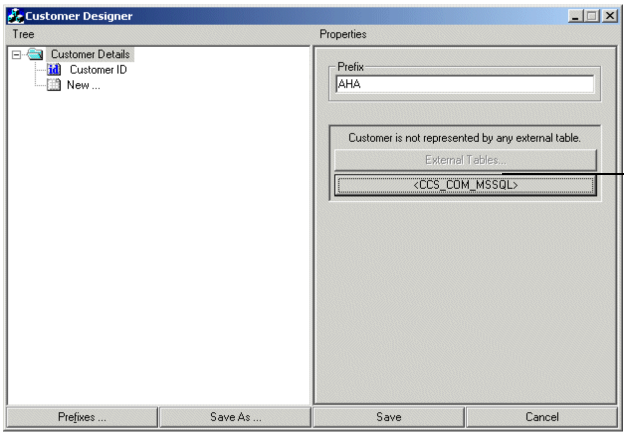
To use the External Data Source option, a DSN name needs to be set up on the server and Noetica will need to add an entry to the CCS_Interfaces table, with the Interface Alias being unique.

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



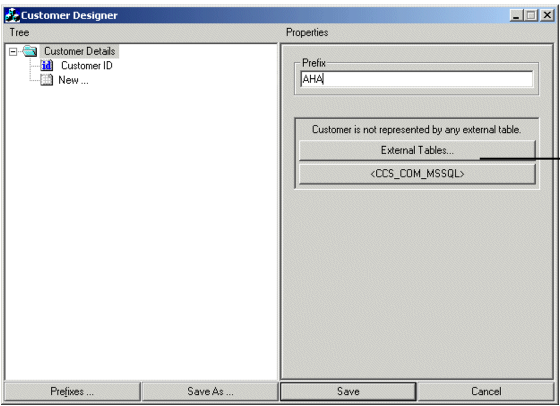
Selecting External Data Sources

- 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.



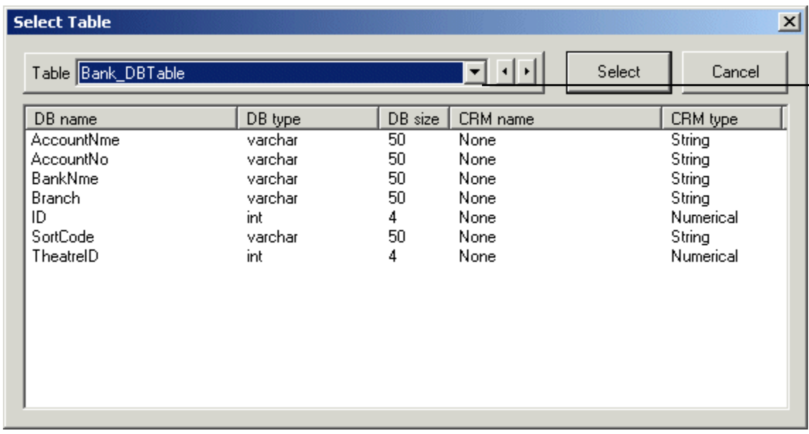
Data Source

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



External Tables

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



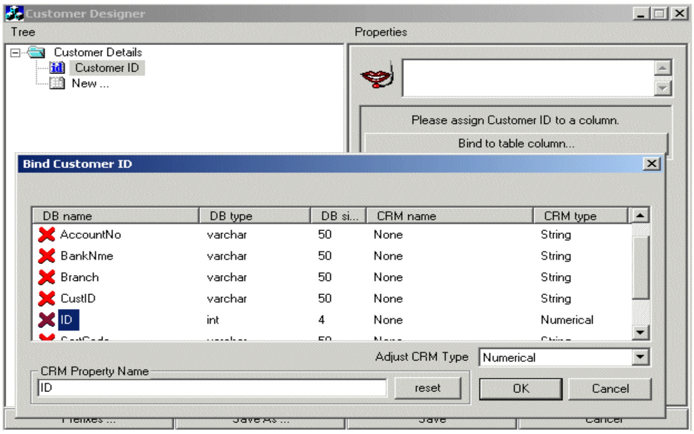
Select the desired table from the list of all available tables

The selected table now represents your ***Main Customer*** table.

Binding Customer ID to External Table Column

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

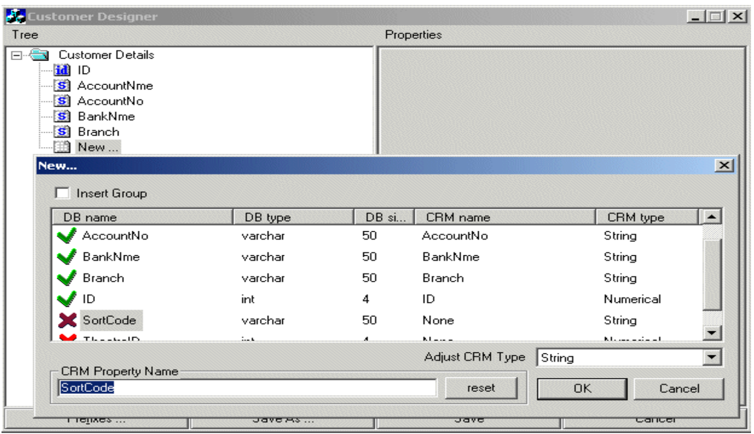
- Select **Customer ID** in the CRM Design table and click the **Bind to table column** button on the right hand side.
- In the *Bind Customer ID* window, select the column to be handled as Customer ID.



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

Adding Properties

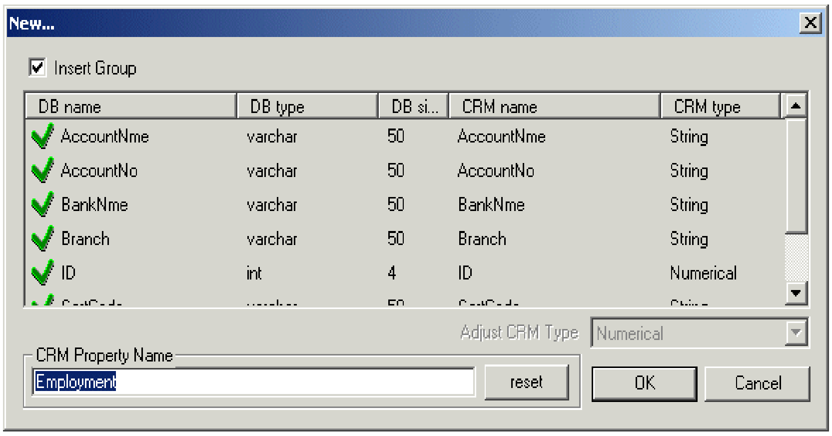
- To add a table property to your CRM double click **New..** in the Tree of the Customer Designer.
- From the table displayed, select the required column ('DB name' column) and click OK or simply double click on the property name.
- Use the ***CRM Property Name*** field to define a different name for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



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.

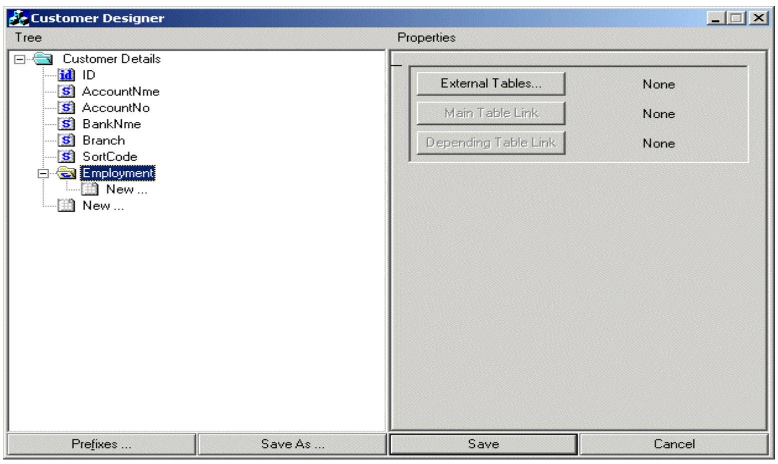


Selecting External Data Sources for a Group

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

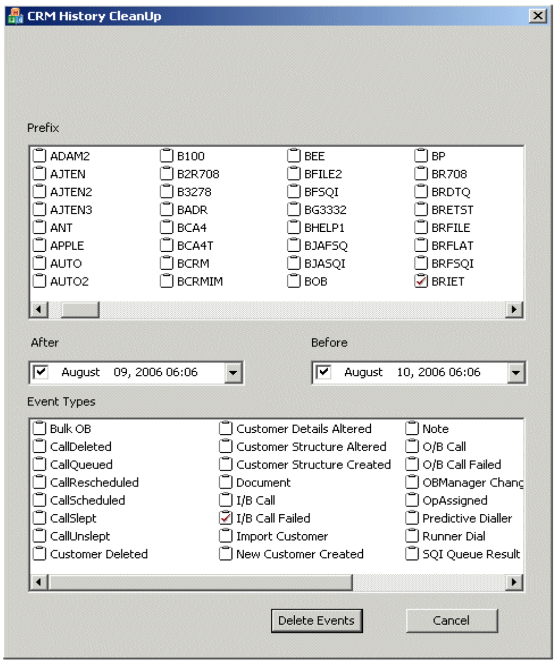
Selected CRM history events and unused CRM prefixes can be deleted in the *Campaign Editor*, which is opened selecting ***Campaigns*** under the **Setup** heading of the Synthesys main screen.

CRM History Cleanup

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

- Expand the ***More Tools*** 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.



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.

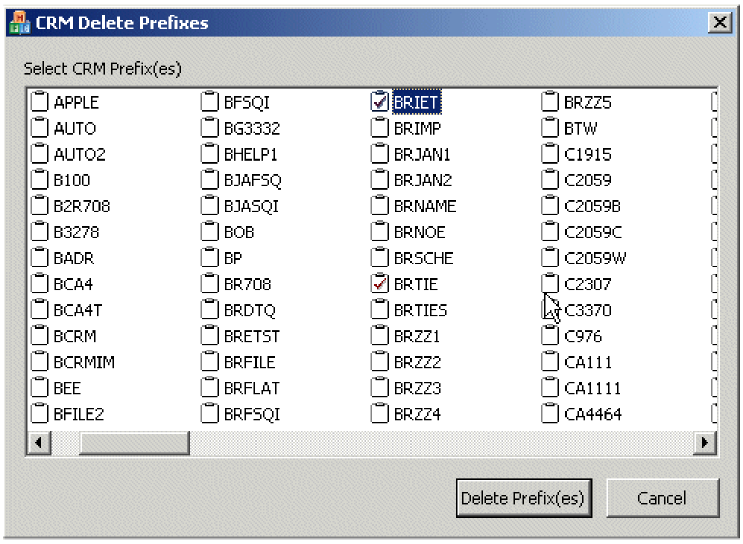
CRM Delete Prefix

To delete CRM prefixes:

- Expand the **More Tools** 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.



- 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.

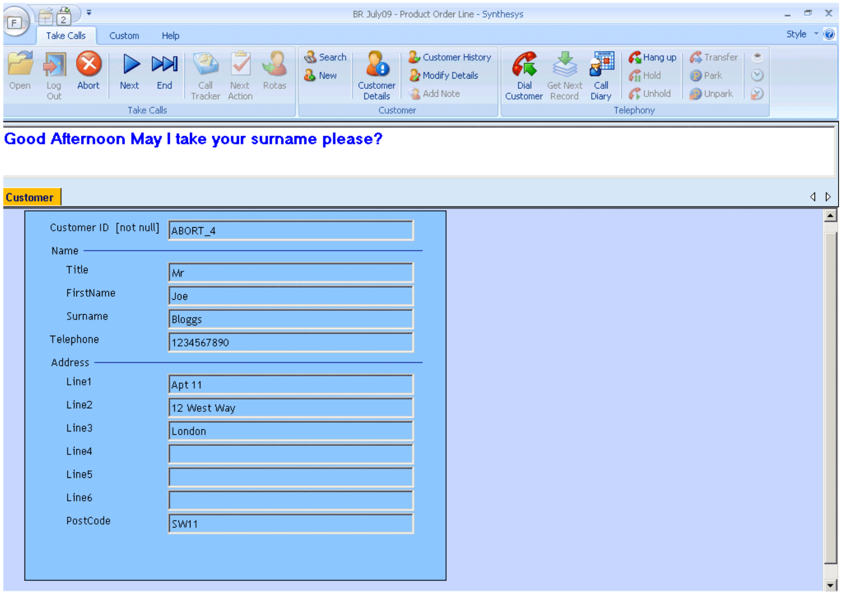
CRM prefixes that are still used in a campaign can't be deleted.

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  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.



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

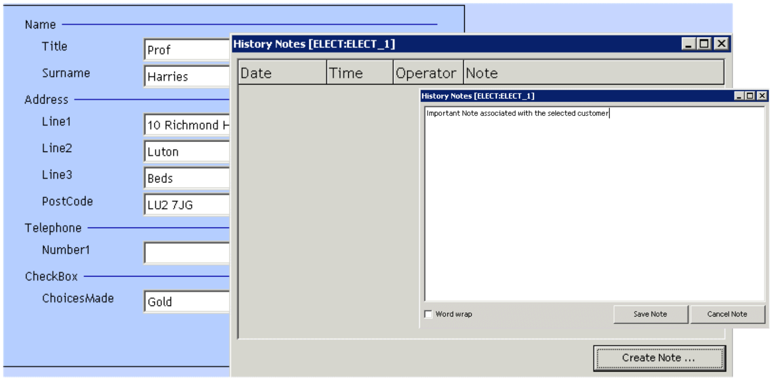
Option	Used To
	**Search**. Enables the search for existing customer details.
	**New**. Add a new customer.
	**Modify**. Allows the modification of existing customer details.
	**Details**. Display customer details.
	**Notes**. Display and add information related to the customer.
	**History.** Access 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.

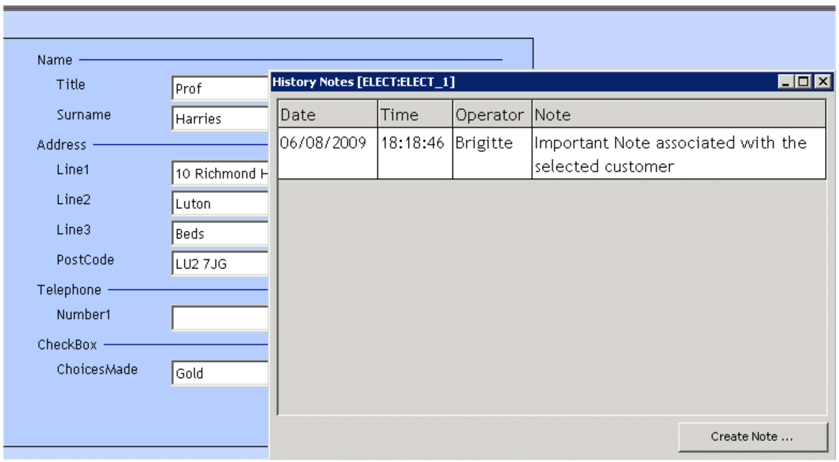
Attaching Notes to a CRM Record

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.



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

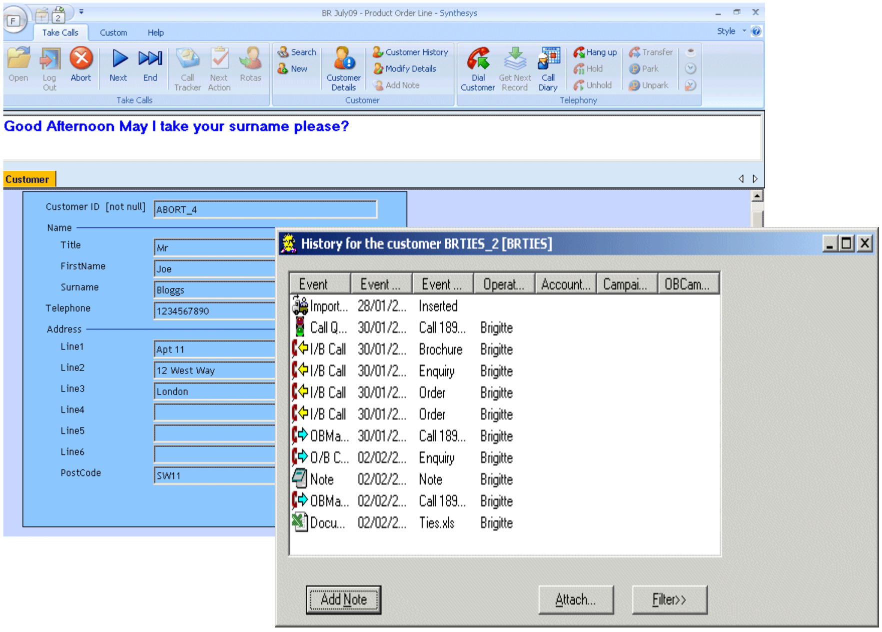
To open a note manually, click on the CRM Notes icon on the Customer toolbar.

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***.



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**.