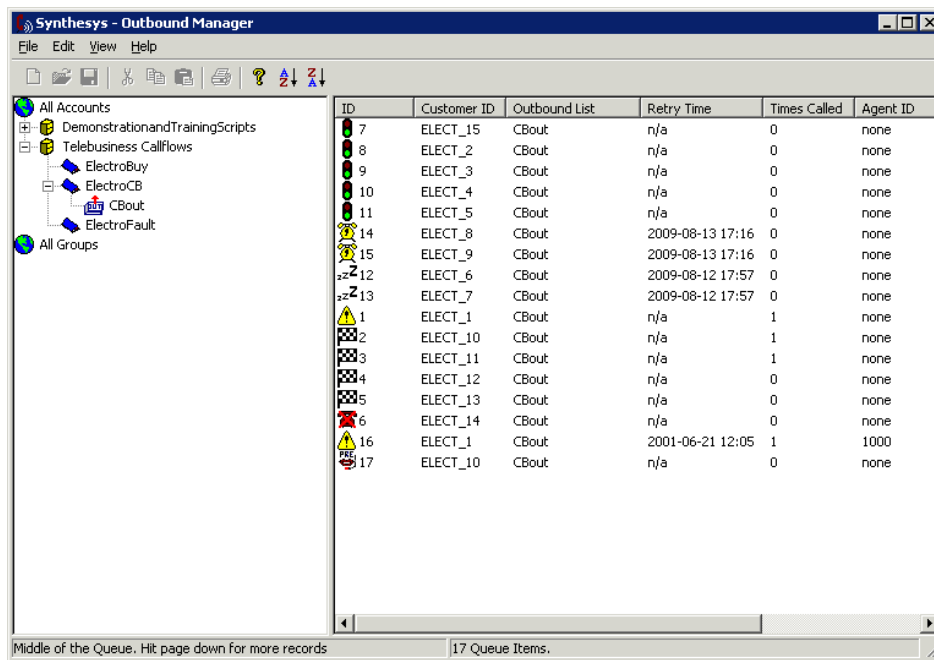


# SYNTHESYS OUTBOUND

## Viewing & Managing Outbound Lists



ID	Customer ID	Outbound List	Retry Time	Times Called	Agent ID
7	ELECT_15	CBout	n/a	0	none
8	ELECT_2	CBout	n/a	0	none
9	ELECT_3	CBout	n/a	0	none
10	ELECT_4	CBout	n/a	0	none
11	ELECT_5	CBout	n/a	0	none
14	ELECT_8	CBout	2009-08-13 17:16	0	none
15	ELECT_9	CBout	2009-08-13 17:16	0	none
12	ELECT_6	CBout	2009-08-12 17:57	0	none
13	ELECT_7	CBout	2009-08-12 17:57	0	none
1	ELECT_1	CBout	n/a	1	none
2	ELECT_10	CBout	n/a	1	none
3	ELECT_11	CBout	n/a	1	none
4	ELECT_12	CBout	n/a	0	none
5	ELECT_13	CBout	n/a	0	none
6	ELECT_14	CBout	n/a	0	none
16	ELECT_1	CBout	2001-06-21 12:05	1	1000
17	ELECT_10	CBout	n/a	0	none

Middle of the Queue. Hit page down for more records | 17 Queue Items.

## VIEWING QUEUED CALLS














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## Explanation of Icons and Queue States

To view the queued calls for an Outbound list

- Open the Synthesys **Outbound** Manager.
- Click on the desired Outbound list.
- To display inactive Outbound lists, as well as active Outbound call lists in the tree structure, select the **Display Inactive OBCampaigns** option via the **View** menu of the Outbound Manager.


All calls queued for that campaign will be displayed in the window on the right, showing their current queue status.

Icon	Description	Queue State
	<b>Done:</b> refers to outbound calls, which have been completed.	0
	<b>Queued:</b> a <i>green light</i> lists the <i>active</i> calls in the queue waiting to be taken; the <i>red light</i> lists the <i>inactive / deactivated</i> calls	1
	<b>Rescheduled:</b> refers to the number of calls scheduled to be taken at a specific time.	2
	<b>Attention:</b> shows the number of calls, which need the supervisor's attention because the customer to be called has not been reached.	3
	<b>Never Call:</b> lists all clients, which do not wish to be contacted.	4
	<b>Running:</b> shows the number of outbound calls in process.	5
	<b>Sleeping:</b> refers to calls waiting to be put back into the queue.	6
	<b>Wrong Number:</b> incorrect number associated with a client to be called.	9
	<b>Unobtainable Number:</b> if number is not obtainable.	10
	<b>Predictive Call</b> in progress / running	11
	<b>Advanced Recycling</b> strategy complete / done	12
	Emergency: To instigate instant callback.	14
	<b>Moved:</b> Shows calls that have been moved to another OB list as part of advanced recycling rules using the <b>Re-queued</b> or <b>Change Campaign</b> option in the Advanced Recycling Designer or using the <b>Reschedule control</b> to move a record between Outbound lists.	15

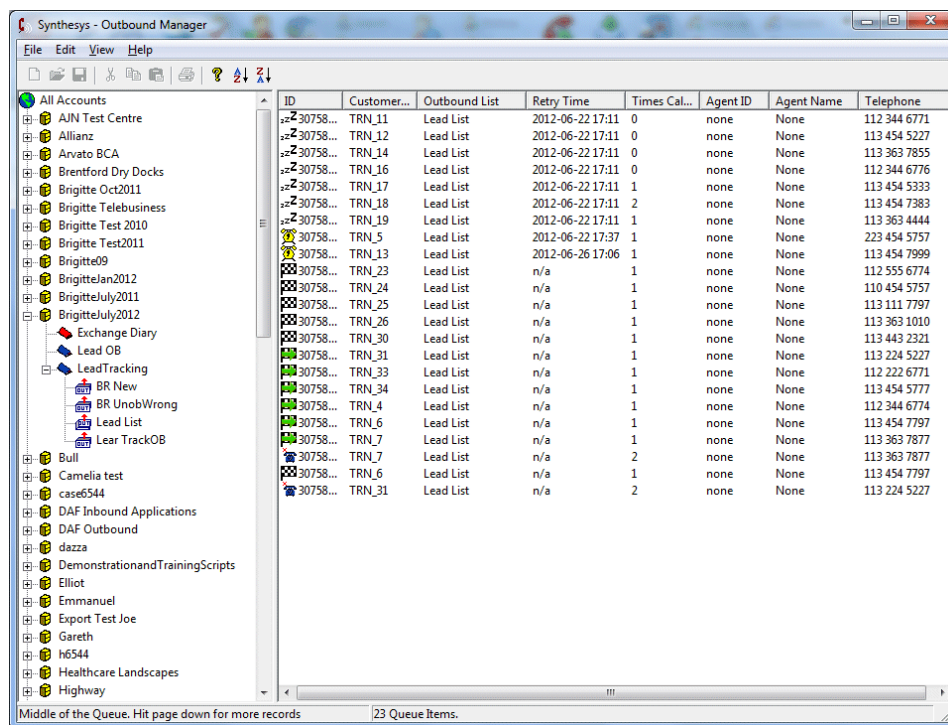
## Lead Tracking

Lead Tracking allows users to follow leads in Synthesys providing a complete life cycle of the call, from the time it was queued, past various queue manipulation activities.

To distinguish between queued records moving to 'Done' because they are completed and 'Done' as a result of certain recycling events, a new queue state 'Moved' has been added.

The *Moved*  queue state is displayed, if

- The **Change Campaign** option is used in the Advanced Recycling Designer to move a queued record to a different Outbound list
- A record is **Re-queued** as part of advanced recycling rules
- The **Reschedule control** is used to move a call between Outbound lists



ID	Customer...	Outbound List	Retry Time	Times Cal...	Agent ID	Agent Name	Telephone
30758...	TRN_11	Lead List	2012-06-22 17:11	0	none	None	112 344 6771
30758...	TRN_12	Lead List	2012-06-22 17:11	0	none	None	113 454 5227
30758...	TRN_14	Lead List	2012-06-22 17:11	0	none	None	113 363 7855
30758...	TRN_16	Lead List	2012-06-22 17:11	0	none	None	112 344 6776
30758...	TRN_17	Lead List	2012-06-22 17:11	1	none	None	113 454 5333
30758...	TRN_18	Lead List	2012-06-22 17:11	2	none	None	113 454 7383
30758...	TRN_19	Lead List	2012-06-22 17:11	1	none	None	113 363 4444
30758...	TRN_5	Lead List	2012-06-22 17:37	1	none	None	223 454 5757
30758...	TRN_13	Lead List	2012-06-26 17:06	1	none	None	113 454 7999
30758...	TRN_23	Lead List	n/a	1	none	None	112 555 6774
30758...	TRN_24	Lead List	n/a	1	none	None	110 454 5757
30758...	TRN_25	Lead List	n/a	1	none	None	113 111 7797
30758...	TRN_26	Lead List	n/a	1	none	None	113 363 1010
30758...	TRN_30	Lead List	n/a	1	none	None	113 443 2321
30758...	TRN_31	Lead List	n/a	1	none	None	113 224 5227
30758...	TRN_33	Lead List	n/a	1	none	None	112 222 6771
30758...	TRN_34	Lead List	n/a	1	none	None	113 454 5777
30758...	TRN_4	Lead List	n/a	1	none	None	112 344 6774
30758...	TRN_6	Lead List	n/a	1	none	None	113 454 7797
30758...	TRN_7	Lead List	n/a	1	none	None	113 363 7877
30758...	TRN_7	Lead List	n/a	2	none	None	113 363 7877
30758...	TRN_6	Lead List	n/a	1	none	None	113 454 7797
30758...	TRN_31	Lead List	n/a	2	none	None	113 224 5227

The two tables that support lead tracking are *Phoenix\_Lead* (containing one row in phoenix\_lead for each initial lead created in Synthesys) and *Phoenix\_Lead\_Tracking* (with a record for each queue instance).

Recycling events and queue states can be tied to dial events by linking records between phoenix\_recycling and phoenix\_statistics using the *ContactID* column.

## Queue State

If you select and right click on any of the queued calls listed in the *Queue Context window* on the right, a drop down menu will be displayed from which you can select a variety of Options, depending on the call outcome.

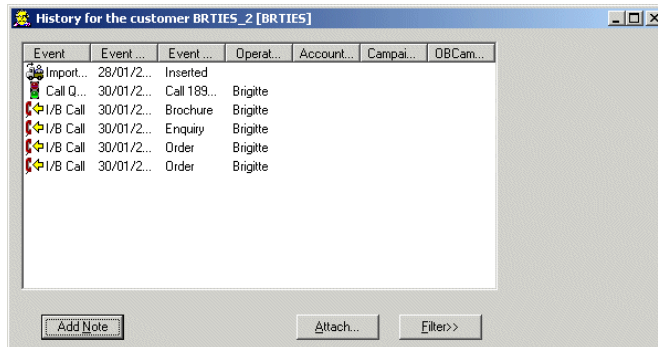
ID	Customer...	Outbound List	Retry Time	Times Cal...	Agent ID	Agent Name	Telephone
30758...	TRN_18	Second CRM	n/a	0	none		113 454 7383
30758...	TRN_19	Second CRM	n/a	0	none		113 363 4444
30758...	TRN_2	Second CRM	n/a	0	none		113 343 2322
30758...	TRN_20	Second CRM	n/a	0	none		112 234 1111
30758...	TRN_21	Second CRM	n/a	0	none		113 343 2334
30758...	TRN_22	Second CRM	n/a	0	none		112 112 2211
30758...	TRN_23	Second CRM	n/a	0	none		112 555 6774
30758...	TRN_24	Second CRM	n/a	0	none		110 454 5757
30758...	TRN_25	Second CRM	n/a	0	none		113 111 7797
30758...	TRN_26	Second CRM	n/a	0	none		113 363 1010
30758...	TRN_27	Second CRM	n/a	0	none		113 443 2321
30758...	TRN_28	Second CRM	n/a	0	none		113 443 2321
30758...	TRN_29	Second CRM	n/a	0	none		113 443 2321
30758...				0	none		112 343 4454
30758...			09-18 12:33	1	1153	jo	113 343 4541
30758...			09-18 12:33	1	1153	jo	112 344 6771
30758...			09-18 12:38	3	1153	jo	113 454 5777
30758...			09-17 16:45	2	none	None	221 234 4444
30758...				1	none	None	113 454 5227
30758...				3	none	None	113 454 7999
30758...				1	none	None	113 363 7855
30758...				1	none	None	113 343 4541
30758...				1	none	None	112 344 6776
30758...				1	none	None	113 454 5333
30758...				2	none	None	112 222 6771
30758...				2	none	None	112 344 6774
30758...	TRN_5	Second CRM	n/a	2	none	None	113 454 5757

Select Option	To
Operator assign	Select a particular operator from the drop down list to take the outbound call for the selected customer, or remove the agent assignment by selecting <i>&lt;De-assign Agent&gt;</i> . <i>Due Sleeping calls assigned to an operator will change to Reschedule state.</i>
Schedule/Reschedule	Display the <i>Schedule Call</i> window where you can set the date and time frame in which the call should be taken.
Change the Call Time	Set a start and latest time to present sleeping calls. This will change the state of sleeping calls to reschedule.
Queue	Queue calls with a current state of not queued, for example, 'Sleeping' 'Rescheduled' or 'Attention Supervisor' etc.
Sleep	Set a waiting period, before the call is placed back into the queue for outbound calls to be taken.
Delete	Delete the highlighted customer from the queue.
Customer History	Display details of the caller's previous contact with the company.
Customer Details	View details of the customer held in the CRM.
Properties	Display detailed information about a queued call.
Change State	Change the queue state, i.e. from <b>Attention</b> supervisor to <b>Queued</b> .
Move to Outbound	Move calls from one Outbound list to another.
Times Called Information	Details about the number of times called for the selected <b>Queue ID</b> , <b>Lead ID</b> and <b>Customer</b> record.

## Customer History

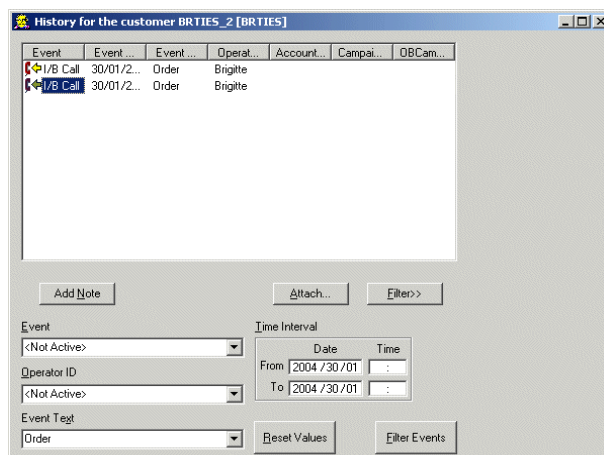
To display the history of that caller, showing details of all previous contact with the company

- Right click on a queued call and select 'Customer History'.



- To filter information, click the Filter button.
- Select or enter the *Event*, *Operator* or *Event Text* and a date and time period, then click the *Filter Events* button on the right.
- To add a Note or document, click the Add Note or Attach.. buttons.
- To display all information associated with the caller, click the 'Reset Values'

In our example we have selected all calls related to 'Order' only.

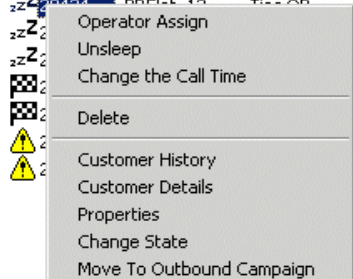


## Changing State of Queued Calls

To change the current queue state of calls with different call outcomes:

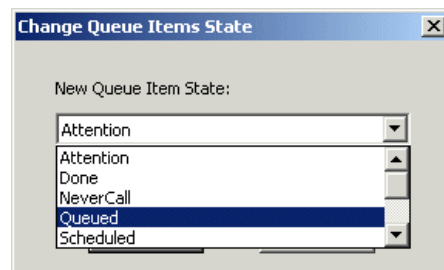
- Select and right click on the queued calls
- Select the Change State option from the drop down menu.

ID	Customer ID	Outbound Campaign	Retry Time	Times Called	Agent ID
20424...	BRFlat_7	Ties OB	n/a	0	none
20424...	BRFlat_3	Ties OB	n/a	0	none
20424...	BRFlat_2	Ties OB	n/a	0	none
20424...	BRFlat_4	Ties OB	n/a	0	none
20424...	BRFlat_10	Ties OB	n/a	0	none
20424...	BRFlat_11	Ties OB	n/a	0	none
20424...	BRFlat_12	Ties OB	2008-02-29 11:15	0	1035
20424...	BRFlat_13	Ties OB	2008-02-29 11:15	0	1035
20424...	BRFlat_14	Ties OB	2008-02-29 11:15	0	1035
20424...	BRFlat_15	Ties OB	n/a	0	none
20424...	BRFlat_16	Ties OB	n/a	0	none
20424...	BRFlat_17	Ties OB	n/a	0	none
20424...	BRFlat_18	Ties OB	n/a	0	none
20424...	BRFlat_19	Ties OB	n/a	0	none
20424...	BRFlat_20	Ties OB	n/a	0	none

- Operator Assign
- Unsleep
- Change the Call Time
- Delete
- Customer History
- Customer Details
- Properties
- Change State
- Move To Outbound Campaign

- In the Change Queue Item State dialog select the queue state that you wish to display for the selected calls.



## Move to Outbound List

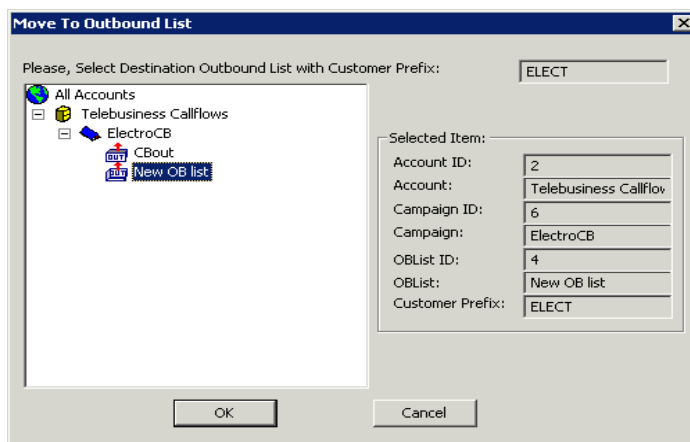
The most efficient way to move queued calls from one Outbound list to another is by using the [Queue Manipulation Wizard \(Outbound: Edit – Bulk Change Queue\)](#).

However, if you just want to move a few calls from one Outbound list to another, you can also use the following steps:

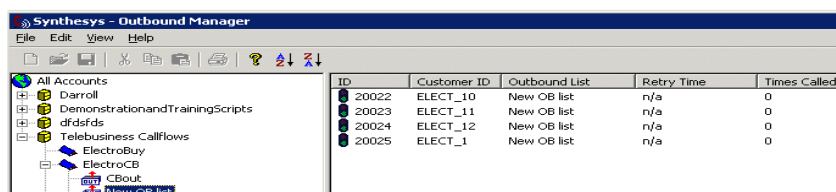
- Right-click on the calls that you wish to move and select the *Move to Outbound List* option.

ID	Customer ID	Outbound List	Retry Time	Times Called
6	ELECT_14	CBout	n/a	0
7	ELECT_15	CBout	n/a	0
8	ELECT_2	CBout	n/a	0
10	ELECT_4	CBout	n/a	0
12	ELECT_6	CBout	n/a	0
13	ELECT_7	CBout	n/a	0
15	ELECT_9	CBout	n/a	0
22	ELECT_10	CBout	2009-09-10 15:33	1
22	ELECT_11	CBout	2009-09-10 15:36	1
22	ELECT_11	CBout	2009-09-10 15:50	1
22	ELECT_3	CBout	n/a	1
22	ELECT_3	CBout	n/a	0
14	ELECT_8	CBout	n/a	0

- In the *Move to Outbound List* dialog, select the target outbound list, displaying all relevant details on the right-hand-side.



- Click *OK* to remove the calls from the original queue and to queue them as newly queued items in the selected outbound list.



ID	Customer ID	Outbound List	Retry Time	Times Called
20022	ELECT_10	New OB list	n/a	0
20023	ELECT_11	New OB list	n/a	0
20024	ELECT_12	New OB list	n/a	0
20025	ELECT_1	New OB list	n/a	0



**All moved calls, regardless of their current queue state, will be displayed in the target list as freshly queued calls, with the number of times called set back to 0.**

**To move multiple calls on a regular basis use the [Queue Manipulation Wizard \(Outbound: Edit – Bulk Change Queue\)](#).**

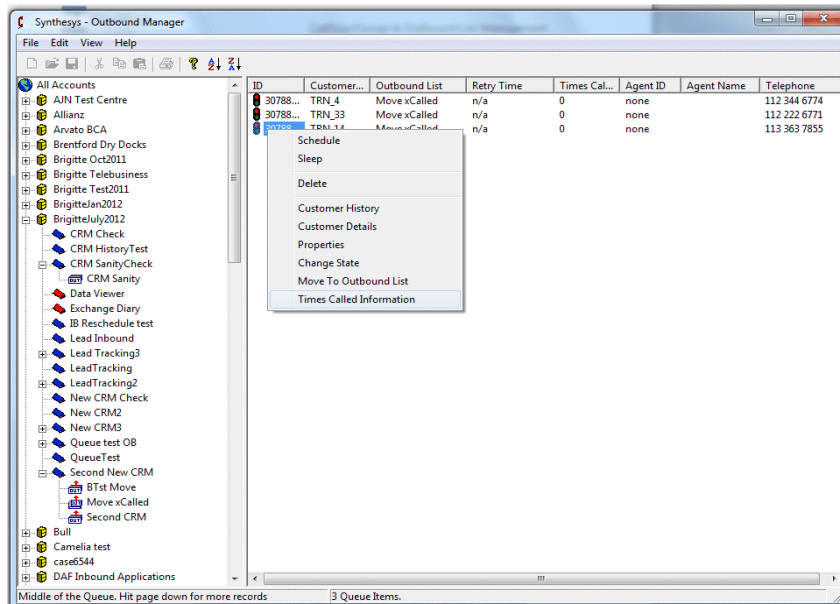


## Times Called Information

The Synthesys Outbound Manager now displays the number of times a record has been dialled in two columns. The ***Times Called for this list*** shows the number of dials for the selected outbound list, the ***Total Times Called*** shows the total number of dials for the lead.

More detailed call information can be viewed via the *Times Called Information* option:

- Right-click on the queued call in the *Outbound Manager* and select the Times Called Information option from the drop down menu.

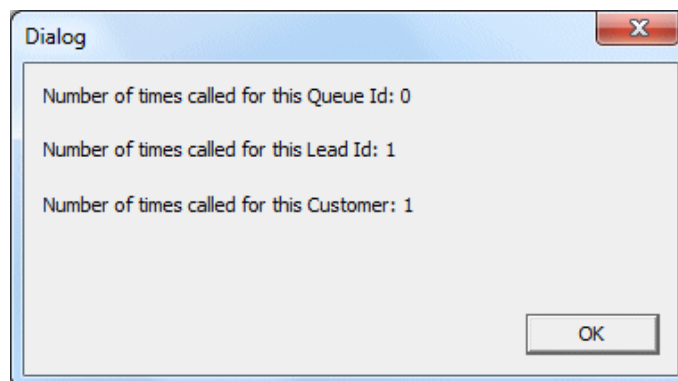


You can now view details about the number of dials for the selected **Queue ID**, **Lead ID** and **Customer** record.



***Looking at the Number of times called information in our example, we can see that there are zero dial events for the Queue Id in the current Outbound list.***

***We can however see that the customer record was previously called from another Outbound list, as a '1' is shown for the Lead Id and Customer.***

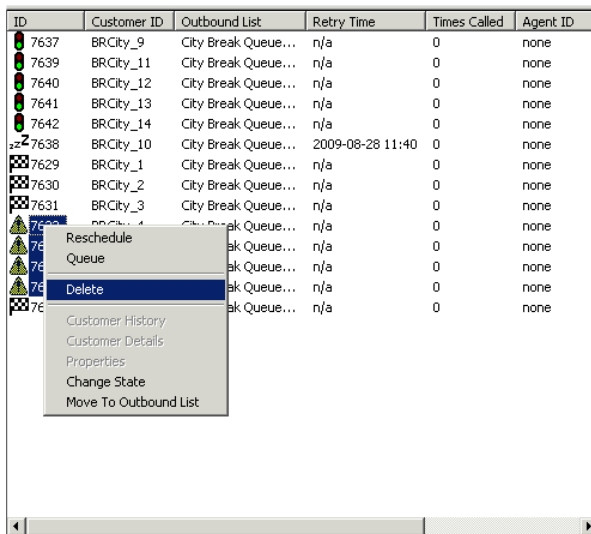


## Deleting Queued Items

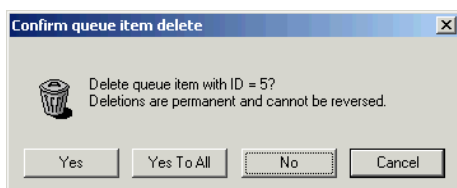
To delete selected items from the call queue:

- Select and right click on the relevant ID's in the right-hand window.
- Select Delete from the drop down menu.

For multiple call selection you can use the *Shift* or *Control* keys in combination with selecting relevant ID's in the call queue.



If you are sure that you want to delete all items that you have selected from the call queue, click the 'Yes to All' button in the 'Confirm queue item delete' window.



To check each ID separately, click 'Yes' to delete the ID or 'No' to retain the ID in the queue.














A message will confirm the number of items deleted successfully.

## Viewing Queue Statistics

To view statistical information on all calls queued for a particular Account or Campaign

- Right click on the relevant Account or Campaign and select 'Statistics'.

The Queue Items shown for the currently selected outbound list are as follows:

Queue Items		
 Done:	7	7 O/B calls have been done/ completed
 Queued:	13	13 O/B calls are queued
 Scheduled:	5	5 O/B calls have been rescheduled to be taken at a specified time
 Attention:	1	1 O/B call is set for attention of the supervisor
 Never Call:	0	
 Running:	0	
 Sleeping:	8	8 O/B calls have sleeping status, to be taken at a specified time
 Wrong No:	0	
 Unobtainable:	0	
 PD Running:	0	
 Recycling Complete:	0	
 Moved:	0	
 Emergency:	0	
<b>Total:</b>	<b>34</b>	<b>34 Total number of O/B calls currently in the queue</b>

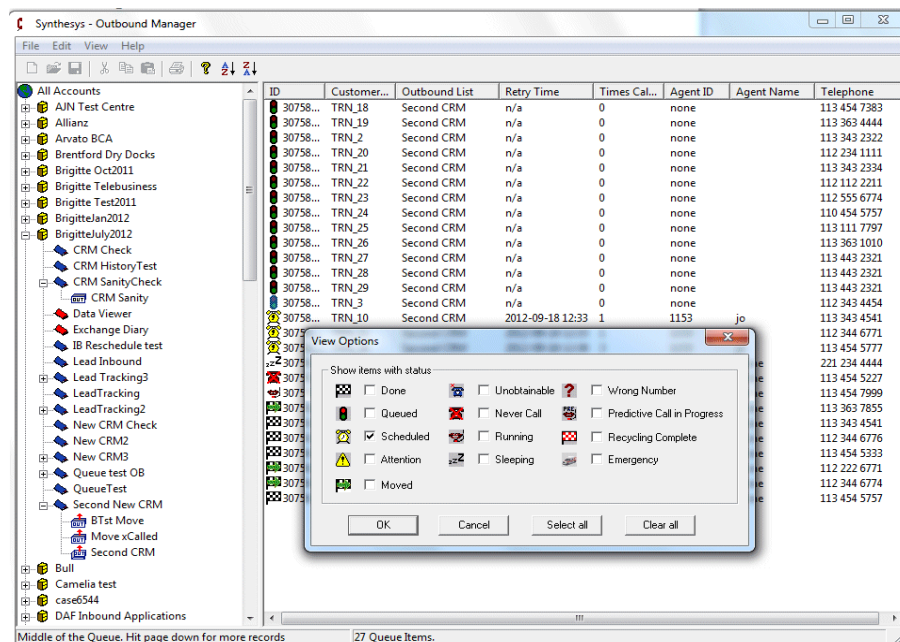
Structure	
Accounts:	75
Campaigns:	627
CRM	378
Outbound Lists:	580
Active:	475

## Setting a Filter

To set a Filter to display particular call outcomes only, go to **VIEW** on the **menu bar** and select **Set Filter**.

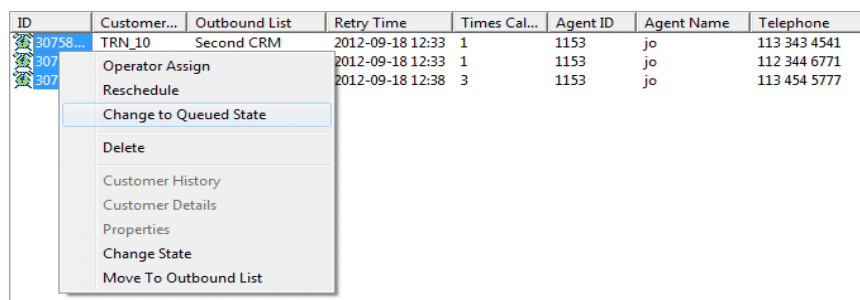
- To show all queued items, click the 'Select all' tab and then OK.
- To start a new selection, click 'Clear all', before ticking the required status.

In our example we have placed a tick into the *Scheduled* box, to display only calls with the status *Rescheduled*.



To place all these rescheduled calls back into the live queue:

- Select and right click on all calls and select *Change to Queued State*.



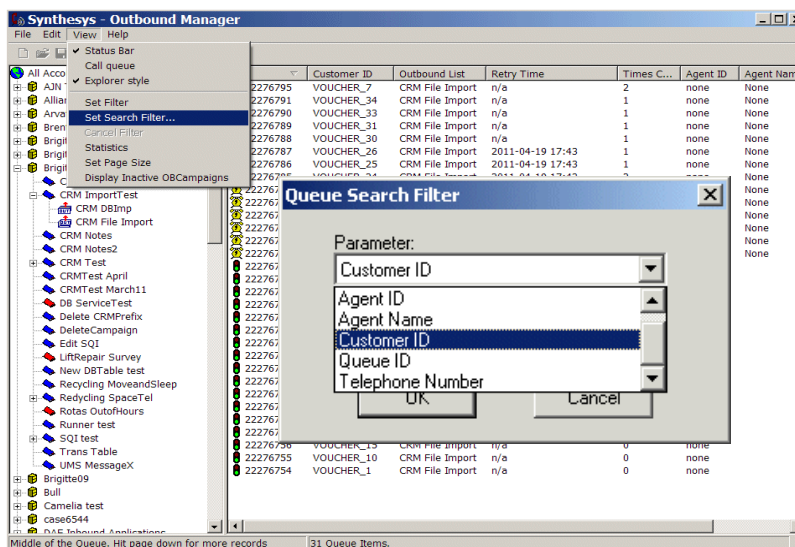
To search for a specific Customer ID, Telephone Number, Agent ID, Agent Name or Queue ID, use the **Set Search Filter** option described on the next page.

## Set Search Filter

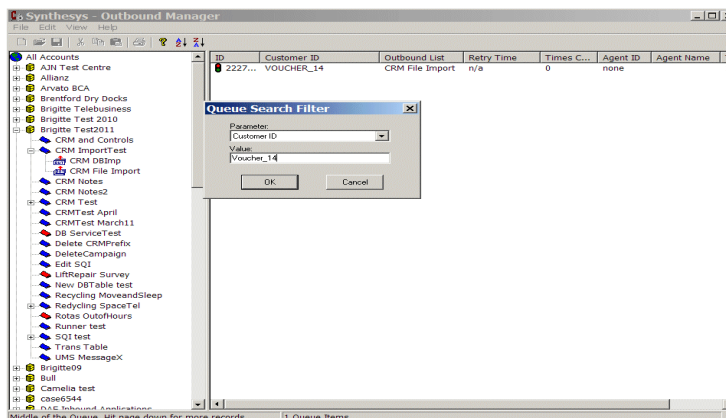
The Set Search Filter option is used to carry out searches based on 'Customer ID', 'Telephone Number', 'Agent ID', 'Agent Name' or 'Queue ID'.

- To search for specific records in all accounts, select the *All Accounts* icon in the left-hand side of the Outbound Manager, before clicking on *Set Search Filter*.
- To display matching records for a *specific Outbound List*, select this Outbound List, before clicking on *Set Search Filter*.

In our example, we select the **All Accounts** icon before clicking *Set Search Filter*. As search criteria, we choose **Customer ID** from the parameter drop down list.



We enter a specific Customer ID (i.e. Voucher\_14) and click OK, to return the matching record(s) for the selected Customer ID.



Go to **View** on the menu bar and select **Cancel Filter**, to display all queued items again.