

SYNTHESYS OUTBOUND

Viewing & Managing Outbound Lists

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All Accounts		Customer ID				
All Accounts DemonstrationandTrainingScripts		ELECT 15	Outbound List CBout	Retry Time	Times Called	Agent ID
Telebusiness Callflows	8	ELECT_15 ELECT_2	CBout	n/a	0	none none
		_				
ElectroCB	I X	ELECT_3	CBout	n/a	0	none
CBout	10	ELECT_4	CBout	n/a	0	none
SectroFault	11 14	ELECT_5	CBout	n/a	0	none
All Groups	2 14 15	ELECT_8	CBout	2009-08-13 17:16	0	none
	_{zz} Z ₁₂	ELECT_9	CBout	2009-08-13 17:16	0	none
	₂ z ² 12 ₂ z ² 13	ELECT_6	CBout	2009-08-12 17:57	0	none
		ELECT_7	CBout	2009-08-12 17:57	0	none
		ELECT_1	CBout	n/a	1	none
		ELECT_10	CBout	n/a	1	none
	223 3	ELECT_11	CBout	n/a	1	none
	223 4	ELECT_12	CBout	n/a	0	none
	22 5	ELECT_13	CBout	n/a	0	none
	2 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



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

ile Edit <u>V</u> iew <u>H</u> elp								
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All Accounts	▲ ID	Customer	Outbound List	Retry Time	Times Cal	Agent ID	Agent Name	Telephone
- 😰 AJN Test Centre	2zZ30758	TRN 11	Lead List	2012-06-22 17:11	0	none	None	112 344 6771
- 😰 Allianz	₂z Z 30758	TRN_12	Lead List	2012-06-22 17:11	0	none	None	113 454 5227
- 🛱 Arvato BCA	₂z ^Z 30758	TRN_14	Lead List	2012-06-22 17:11	0	none	None	113 363 7855
Brentford Dry Docks	₂z ^Z 30758	TRN_16	Lead List	2012-06-22 17:11	0	none	None	112 344 6776
Brigitte Oct2011	₂z ^Z 30758	TRN_17	Lead List	2012-06-22 17:11	1	none	None	113 454 5333
Brigitte Telebusiness	₂z ^Z 30758	TRN_18	Lead List	2012-06-22 17:11	2	none	None	113 454 7383
	≡ ₂z ^Z 30758	TRN_19	Lead List	2012-06-22 17:11	1	none	None	113 363 4444
Brigitte Test2011	2 30758	TRN_5	Lead List	2012-06-22 17:37	1	none	None	223 454 5757
Brigitte09	2 30758	TRN_13	Lead List		1	none	None	113 454 7999
BrigitteJan2012	30758	TRN_23	Lead List	n/a	1	none	None	112 555 6774
BrigitteJuly2011	30758	TRN_24	Lead List	n/a	1	none	None	110 454 5757
BrigitteJuly2012	30758	TRN_25	Lead List	n/a	1	none	None	113 111 7797
Exchange Diary	30758	TRN_26	Lead List	n/a	1	none	None	113 363 1010
Lead OB	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
LeadTracking	30758	TRN_33	Lead List	n/a	1	none	None	112 222 6771
BR New	30758	TRN_34	Lead List	n/a	1	none	None	113 454 5777
BR UnobWrong	30758	TRN_4	Lead List	n/a	1	none	None	112 344 6774
🚽 🚋 Lead List	30758	TRN_6	Lead List	n/a	1	none	None	113 454 7797
Lear TrackOB	30758	TRN_7	Lead List	n/a	1	none	None	113 363 7877
😰 Bull	30758	TRN_7	Lead List	n/a	2	none	None	113 363 7877
🖙 😰 Camelia test	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
DAF Inbound Applications								
DAF Outbound								
😰 dazza								
- 🕞 DemonstrationandTrainingScripts								
😥 Elliot								
- 😥 Emmanuel								
🕞 Export Test Joe								
Gareth								
6544								
- 😰 Healthcare Landscapes								
- 🖗 Highway								

• The *Reschedule control* is used to move a call between Outbound lists

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 90758 TRN J8 Second CRM 90758 TRN J9 Second CRM 90758 TRN 20 Second CRM 90758 TRN 21 Second CRM 90758 TRN 22 Second CRM 90758 TRN 23 Second CRM 90758 TRN 24 Second CRM 90758 TRN 22 Second CRM 90758 TRN 24 Second CRM 90758 TRN 25 Second CRM 90758 TRN 25 Second CRM 90758 TRN 28 Second CRM 90758 TRN 29 Second CRM 90758 TRN 28 Second CRM 90758 TRN 28 Second CRM 90758 TRN 28 Second CRM 90758 Customer History 90758.	n/a 0 none 113 454 7383 n/a 0 none 113 363 4444 n/a 0 none 113 342 232 n/a 0 none 113 343 232 n/a 0 none 112 12 211 n/a 0 none 112 12 2211 n/a 0 none 112 12 2211 n/a 0 none 113 111 7797 n/a 0 none 113 111 7797 n/a 0 none 113 443 2321 n/a 0 n
Select Option	То
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>>De-assign Agent></i> . Due Sleeping calls assigned to an operator will change to Reschedule state.
Schedule/Reschedule	Display the Schedule Call 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 <i>Attention</i> supervisor to <i>Queued</i> .
Move to Outbound	Move calls from one Outbound list to another.
Times Called Information	Details about the number of times called for the selected Queue ID , Lead ID and Customer 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'.

Event	Event	Event	Operat	Account	Campai	OBCam	
🗯 Import	28/01/2	Inserted					
🖥 Call Q	30/01/2	Call 189	Brigitte				
¢1/B Call	30/01/2	Brochure	Brigitte				
↓1/B Call	30/01/2	Enquiry	Brigitte				
↓ I/B Call	30/01/2	Order	Brigitte				
↓I/B Call	30/01/2	Order	Brigitte				

- 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.

Event Event	Event Ope	rat Account	Campai	OBCam]	
↓ I/B Call 30/01/2	Order Brigit					
K I/B Call 30/01/2	Order Brigit	te				
Add Male		Aurak	_1			
Add Note		<u>A</u> ttach		ilter>>		
Add Note		<u>Attach</u> <u>Time Interval</u>		ilter>>		
	-					
vent «Not Active»	-	 ∐ime Interval	te Tir			
vent «Not Active» Operator ID	<u>-</u>	 	te Tir 30 / 01	ne		
vent «Not Active»	<u>-</u>	 From [2004.73	te Tir 30 / 01	ne		



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
2ZZ20404 DDCI-L40	Ti 00	2008-02-29 11:15	0	1035
_{2Z} Z ² Operator Assign _{2Z} Z ² Unsleep		2008-02-29 11:15	0	1035
		2008-02-29 11:15	0	1035
Change the Call Tim	e	n/a	0	none
🗱 2 Delete		n/a	0	none
<u>^</u> 2		n/a	0	none
Customer History		n/a	0	none
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.

Change Queue Items State	×
New Queue Item State:	
Attention	•
Attention	A
Done	
NeverCall	
Queued	
Scheduled	-



Move to Outbound List

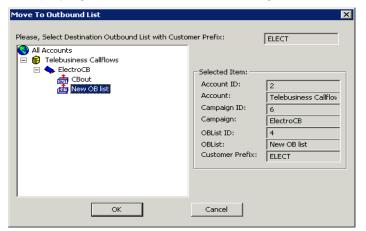
The most efficient way to move queued calls from one Outbound list to another is by using the <u>Queue Manipulation Wizard</u> (Outbound: Edit – Bulk Change Queue).

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
87	ELECT_15	CBout	n/a	0
88	ELECT_2	CBout	n/a	0
e 10	ELECT_4	CBout	n/a	0
8 12	ELECT_6	CBout	n/a	0
8 13	ELECT_7	CBout	n/a	0
8 15	ELECT_9	CBout	n/a	0
zZ2	ELECT_10	CBout	2009-09-10 15:33	1
zZ	FLECT 11	CROUT	2009-09-10 15:36	1
z Z De	lete		2009-09-10 15:50	1
SS Ch	ange State		n/a	1
Mo.	ve To Outbound L	ist	n/a	0
221 	ELECT_3	CBOOC	n/a	0
8814	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.

🎧 Synthesys - Outbound Manager					
<u>File Edit View H</u> elp					
🗅 🛩 🖬 % 🖻 💼 🍜 😵 🛃					
S All Accounts	ID	Customer ID	Outbound List	Retry Time	Times Called
🕀 😰 Darroll	8 20022	ELECT_10	New OB list	n/a	0
DemonstrationandTrainingScripts	8 20023	ELECT_11	New OB list	n/a	0
🖭 😥 dfdsfds	20024	ELECT_12	New OB list	n/a	0
Telebusiness Califlows CentrocB Centro	8 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 <u>Queue Manipulation Wizard</u> (Outbound: Edit – Bulk Change Queue).

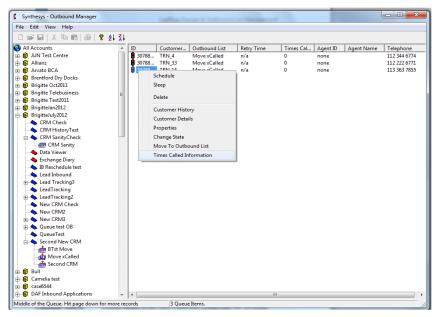


Times Called Information

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.

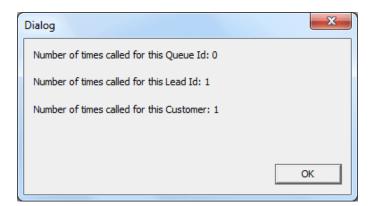


You can now view details about the number of dialls for the selected **Queue ID**, **Lead ID** and **Customer** record.



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.

ID	Customer ID	Outbound List	Retry Time	Times Called	Agent ID
8 7637	BRCity_9	City Break Queue	n/a	0	none
8 7639	BRCity_11	City Break Queue	n/a	0	none
8 7640	BRCity_12	City Break Queue	n/a	0	none
8 7641	BRCity_13	City Break Queue	n/a	0	none
8 7642	BRCity_14	City Break Queue	n/a	0	none
₂z Z 7638		City Break Queue	2009-08-28 11:40	0	none
7629		City Break Queue	n/a	0	none
7630	BRCity_2	City Break Queue	n/a	0	none
7631	BRCity_3	City Break Queue	n/a	0	none
A 7600	Deceleration		n/a	0	none
<u>A</u> 76	Reschedule	ak Queue	n/a	0	none
<u> 76 _</u>	Queue	ak Queue	n/a	0	none
<u>Å</u> 76	Delete	ak Queue	n/a	0	none
88 76		ak Queue	n/a	0	none
	Customer History				
	Customer Details				
	Properties				
	Change State				
	Move To Outbound	List			
4					<u> </u>

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.



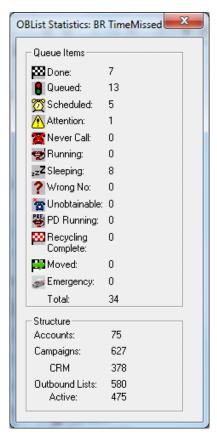
Viewing Queue Statistics

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:

7



- O/B calls have been done/ completed
- 13 O/B calls are queued
- 5 O/B calls have been rescheduled to be taken at a specified time
- 1 O/B call is set for attention of the supervisor
- 8 O/B calls have sleeping status, to be taken at a specified time
- 34 Total number of O/B calls currently in the queue



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*.

ile Edit View Help								
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All Accounts	^ ID	Customer	Outbound List	Retry Time	Times Cal	Agent ID	Agent Name	Telephone
- 😰 AJN Test Centre	30	758 TRN_18	Second CRM	n/a	0	none		113 454 7383
- 😰 Allianz	8 30	758 TRN_19	Second CRM	n/a	0	none		113 363 4444
- 😰 Arvato BCA		758 TRN_2	Second CRM	n/a	0	none		113 343 2322
- 😥 Brentford Dry Docks		758 TRN_20	Second CRM	n/a	0	none		112 234 1111
- 😥 Brigitte Oct2011		758 TRN_21	Second CRM	n/a	0	none		113 343 2334
Brigitte Telebusiness		758 TRN_22	Second CRM	n/a	0	none		112 112 2211
Brigitte Test2011		758 TRN_23	Second CRM	n/a	0	none		112 555 6774
BrigitteJan2012		758 TRN_24	Second CRM	n/a	0	none		110 454 5757
BrigitteJuly2012		758 TRN_25	Second CRM	n/a	0	none		113 111 7797
CRM Check		758 TRN_26	Second CRM	n/a	0	none		113 363 1010
CRM HistoryTest		758 TRN_27	Second CRM	n/a	0	none		113 443 2321
CRM SanityCheck		758 TRN_28	Second CRM	n/a	0	none		113 443 2321
CRM Sanity		758 TRN_29	Second CRM	n/a	0	none		113 443 2321
		758 TRN_3	Second CRM	n/a	0	none		112 343 4454
	2 30	758 TRN_10	Second CRM	2012-09-18 12:3	3 1	1153	јо	113 343 4541
	0 30 0 30	View Options				TERMINE STATE	×	112 344 6771
	2 30		(Second Second	and the second	B) ();	_	1000	113 454 5777
	2z 2 30		th status				e	221 234 4444
Lead Tracking3	2 30		ne 😽 🗆	Unobtainable ?	Wrong Num	L	e	113 454 5227
LeadTracking	10 30		ine 🔯 I	Unobtainable 🦿	wrong inum	Der	e	113 454 7999
LeadTracking2	30		ieued 🖀 🗌	Never Call 👹	Predictive C	all in Progress	e e	113 363 7855
- New CRM Check	30		heduled 🧒 🗆	Bunning 🐯	F n n n		e	113 343 4541
- low CRM2	30		neduled 😒 I	Running 🔛	Recycling C	omplete	e	112 344 6776
🖶 🧄 New CRM3	223 30°		ention ₂ zZ	Sleeping 👳	Emergency		ie.	113 454 5333
🛓 🧄 Queue test OB	30°						e	112 222 6771
	20 30 20 30		oved				le	112 344 6774
	pen 30						le	113 454 5757
- 🚓 BTst Move		ОК	Cance	el Selecta	all Clea	call		
- 🚠 Move xCalled								
📥 Second CRM		<u> </u>						
- 😰 Bull								
🛱 Camelia test								
case6544								
DAF Inbound Applications								

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

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

ID	Customer	Outbound List	Retry Time	Times Cal	Agent ID	Agent Name	Telephone
30758	TRN_10	Second CRM	2012-09-18 12:33	1	1153	jo	113 343 4541
307	Operator Assign Reschedule Change to Queued State Delete Customer History		2012-09-18 12:33	1	1153	jo	112 344 6771
2 <mark>307</mark>			2012-09-18 12:38	3	1153	jo	113 454 5777
	Customer De	etails					
	Properties Change State Move To Outbound List						

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.

l _o s	ynth	esys - Outbound Manage							<u>- 0 ×</u>
File	Edit	View Help							
Die	2 🗖	✓ Status Bar							
		Call queue					-		1
l i i	ACCO AJN 1	 Explorer style 	2276795	Customer ID VOUCHER 7	Outbound List CRM File Import	Retry Time n/a	Times C 2	Agent ID	Agent Name None
	Allia	Set Filter	2276791	VOUCHER_7 VOUCHER_34	CRM File Import	n/a n/a	2	none	None
i i	Arva		2276790	VOUCHER 33	CRM File Import	n/a	i	none	None
i 🖥	Bren	Set Sedicit Filter	2276789	VOUCHER 31	CRM File Import	n/a	i	none	None
i 🖥	Brigit		2276788	VOUCHER_30	CRM File Import	n/a	1	none	None
i i	Briai	Statistics	2276787	VOUCHER_26	CRM File Import	2011-04-19 17:43	1	none	None
i 🗗	Brigit	Set Page Size	2276786	VOUCHER_25	CRM File Import	2011-04-19 17:43	1	none	None
TT.	\$ 0	Display Inactive OBCampaigns	2276705	MOLICUED 34	COM Cile Terrest	3011 04 10 17.43	2		None
1 6	💊 c	RM ImportTest	222767 П I	Jeue Sear	ch Filter			X	None
	- A	CRM DBImp		icue seur					None
	a la	CRM File Import	222767 2222767						None None
	💊 c	RM Notes	222767	D	1				None
	🧄 с	RM Notes2	222767	Parame	ter:				None
	🔶 с	RM Test		Custon	ID				None
-	🔶 С	RMTest April	222767	Luston	nerio				
	🔶 с	RMTest March11	222767		ID.				
-	🔶 D	B ServiceTest	222767	Agent I	U .		≜		
-	🔶 D	elete CRMPrefix	222767	Agent	Name				
-	🔷 D	eleteCampaign	222767						
-	🔶 Е	dit SQI	222767	Custon	her ID				
	🔶 U	ftRepair Survey	222767	Queue	ID				
-		ew DBTable test	222767						
	🔷 R	ecycling MoveandSleep	222767	I eleph	ione Number		_		
		edycling SpaceTel	222767		UK	Land	el T		
	🔶 R	otas OutofHours	222767						
-	🔶 R	unner test	222767						
	🔷 S	QI test	22276730					none	
	🔶 Т	rans Table	22276755	VOUCHER_15 VOUCHER_10	CRM File Import	n/a	0	none	
	🔶 U	MS MessageX	22276754	VOUCHER 1	CRM File Import	n/a	0	none	
🗄 – 😰	Brigit	tte09	222/0/34	VOUCHER_1	citili ne import	iiyu		none	
÷-6	Bull								
🗄 – 😰	Cam	elia test							
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Middle	of th	e Queue. Hit page down for more n	ecords	31 Queue Items.					11.

We enter a specific Customer ID (i.e. Voucher_14) and click OK, to return the matching record(s) for the selected Customer ID.

Synthesys - Outbound Mana File Edit View Help	ger							1×
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All Accounts	ID	Customer ID	Outbound List	Retry Time	Times C	Agent ID	Agent Name	Te
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- DB ServiceTest								
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Go to *View* on the menu bar and select *Cancel Filter,* to display all queued items again.