# OUTBOUND MANAGER

## Managing Quotas
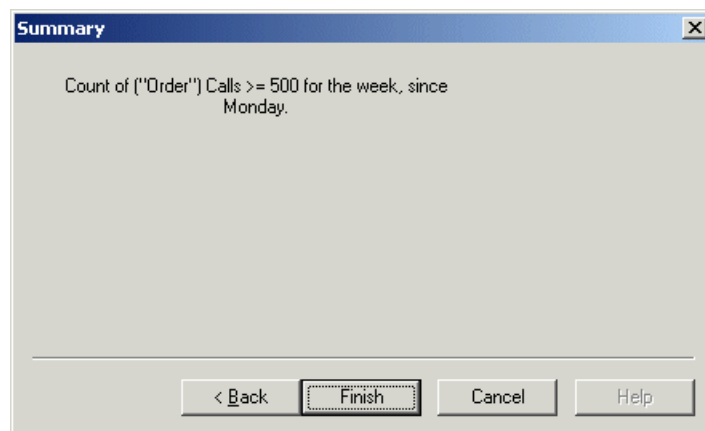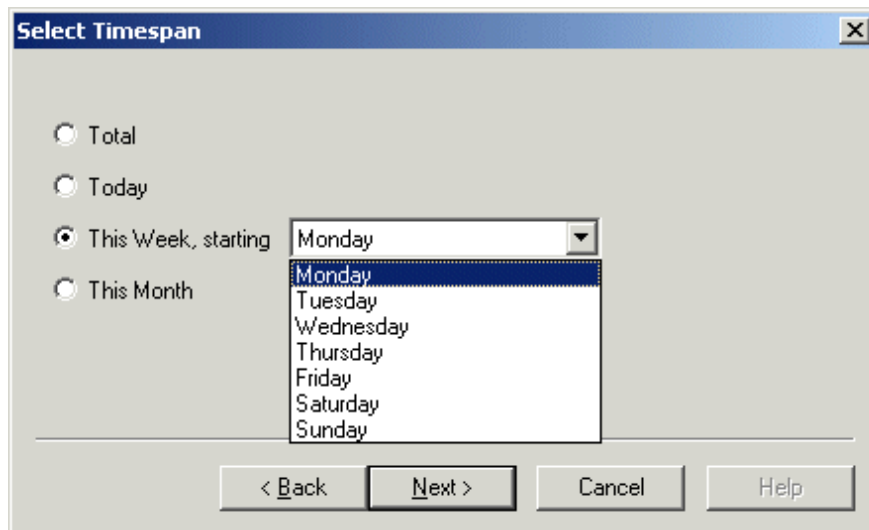
# MANAGING QUOTAS

## Introduction

The *Manage Quotas* option in the Outbound Manager is used to deactivate an Outbound list automatically once a predefined number of calls on a specified call result is achieved and written to the database.

When the Outbound list is deactivated, no new calls will be presented to the agents.

*The target may be exceeded when there are several agents already in a call for a campaign that has reached its target.*

You can specify more than one call result per outbound list.

***Example of multiple call results in one condition:***

- When a specified number of calls with result A or B are achieved for Today() then deactivate the campaign.

***Example of multiple conditions:***

- When a specified number of calls with result A are achieved OR when a specified number of calls with result B is achieved, deactivate the campaign.

Quota targets can be changed whilst the campaign is live, without agents having to log out to pick up the changes made.

## DEFINING QUOTAS

- Open the Synthesys Outbound Manager.

- Locate and right click on the outbound list for which you want to define quotas and select **Manage Quotas** from the drop down menu**.**

A series of Wizard pages will now guide you through the process of defining the conditions that you wish to specify for your quotas.

## New Condition Name

- Enter a name for the condition in the *New Condition Name* window and move to the Next> page of the wizard.
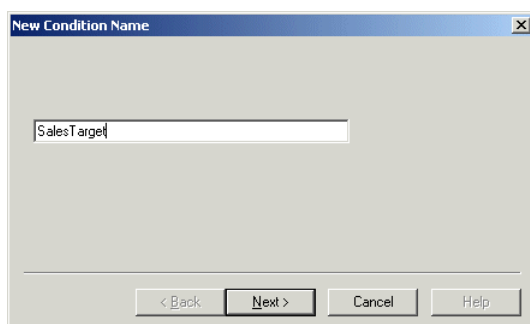


## Call Results

To define the call results that you wish to use:

- Click on the relevant call results in the **Available** window.

- Use the **>** button, to move the results into the **In Use** window.

- To move the call result from the *In Use* window back into the *Available* window, use the **<** button.
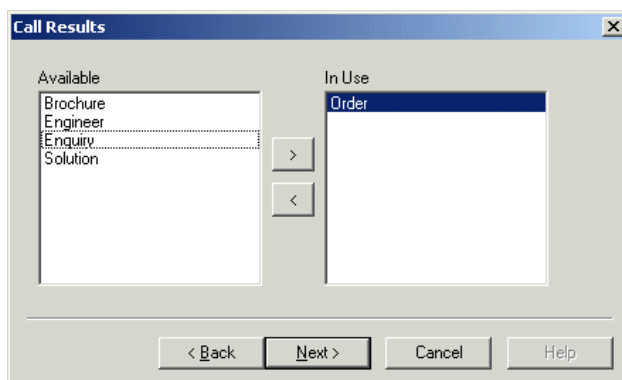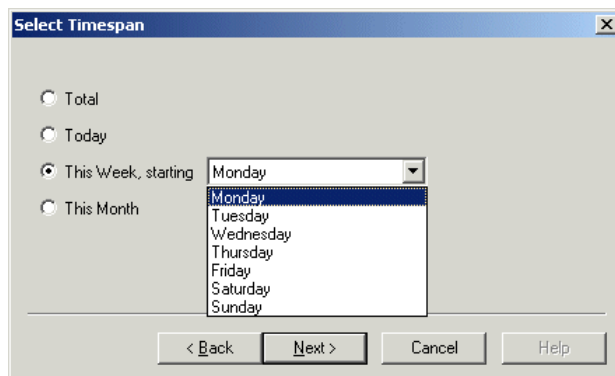
## Specifying Number of Calls

- In the *Set the Limit* window, specify the number of calls to be taken on selected call results.

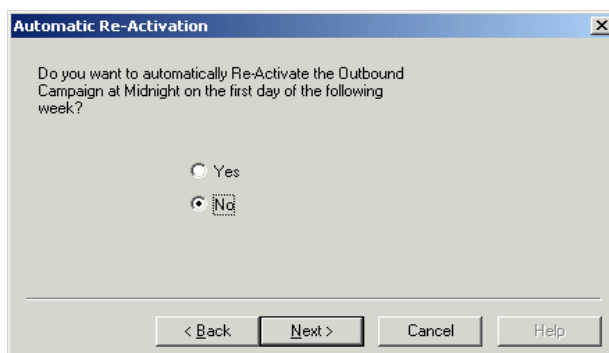Once this target is reached, the outbound list will be deactivated automatically.
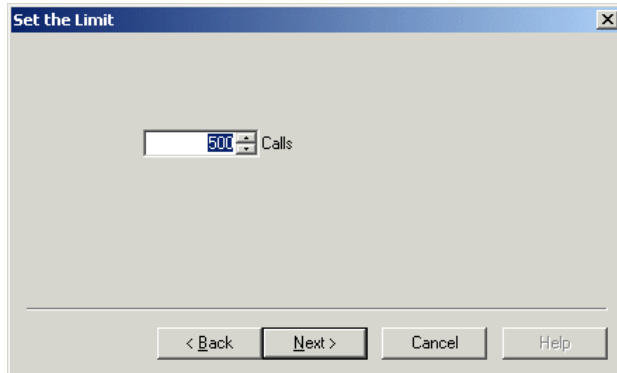


## Selecting Time-span

- Next, select the time period in which the calls should be taken.



## Automatic Re-activation

- Click **Yes** if you wish to activate the outbound list automatically the following day, week or month, depending on the time-span condition set, else select *No*.

## Summary

The final window of the wizard displays a summary of the condition specified, including call result(s), time range and the number of calls to be taken.

- Click *Finish* to save the specified condition for the quota.
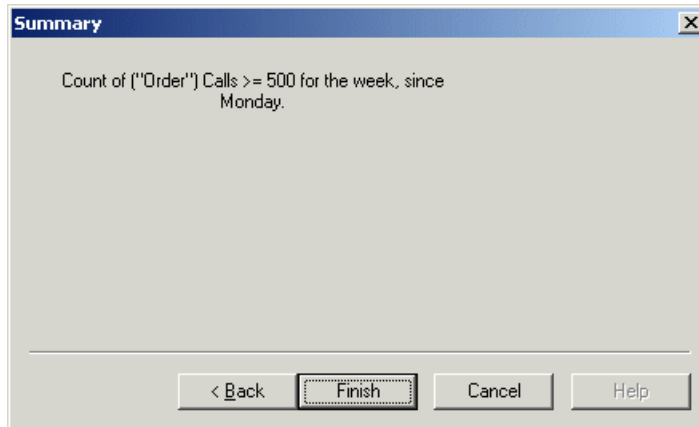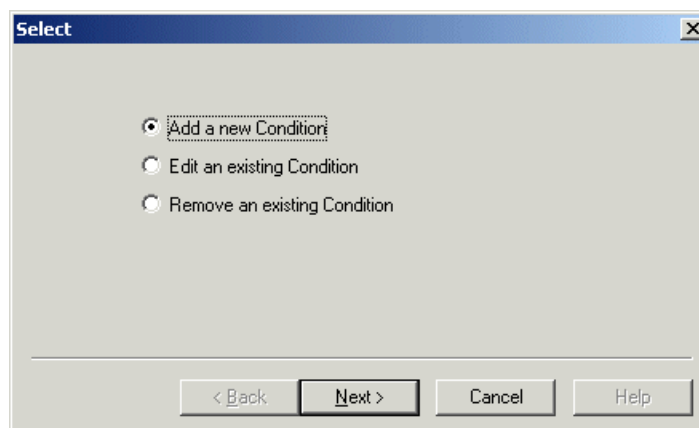


## Adding further Conditions to existing Quotas

To add further conditions to an existing quota:

- Locate and right click on the relevant outbound list and select *Manage Quotas.*

In the first page of the Wizard you can *Add a new Condition*, *Edit* an existing Condition or to *Remove* an existing Condition.



- To add a new condition, click **Add a new Condition**.

- Move through the wizard as descript in the *Defining Quotas* section.

- Click *Finish*, to save the new condition for the quota.

## EDITING EXISTING QUOTAS

When a Quota for a particular call result has been met, any changes made to the quota on this call result will be ignored.

*To edit or create a new quota on a call result where a quota has been met already, you need to delete the Outbound list and created a new one.*
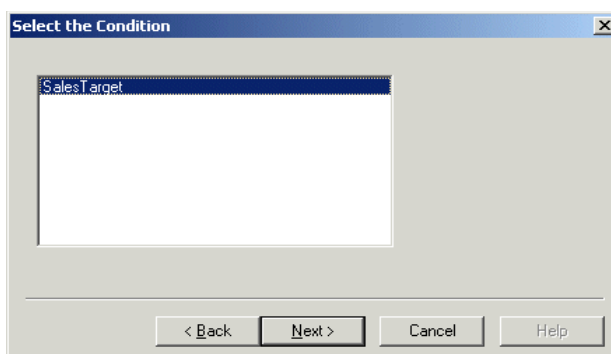
To edit conditions for an existing quota:

- Locate and right click on the outbound list and select *Manage Quotas.*

- In the first page of the wizard select **Edit an existing Condition**.
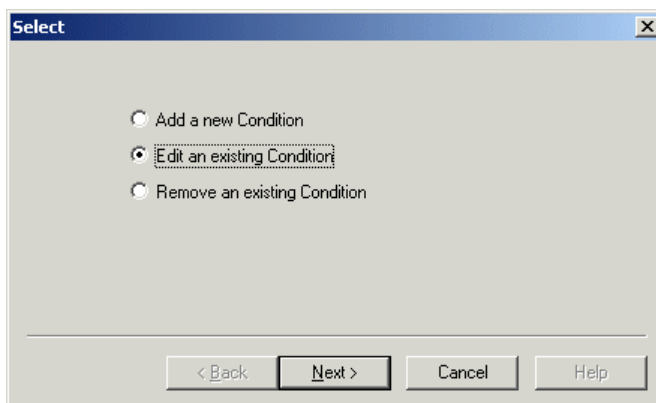


### *Selecting the Condition*

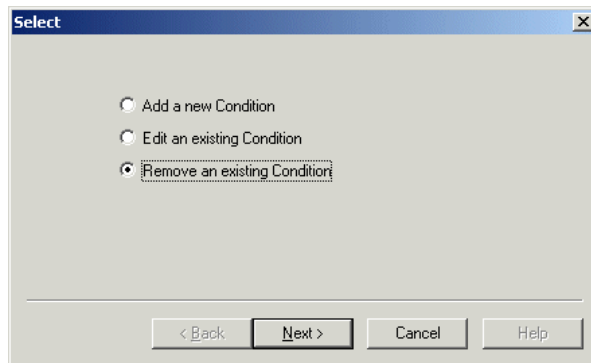- In the next page of the wizard, select the name of the condition that you which to edit.



- Follow the pages through the wizard, adding or removing call results, specifying the number of calls on selected call results and time-span, as descript in the *Defining Quotas* section.
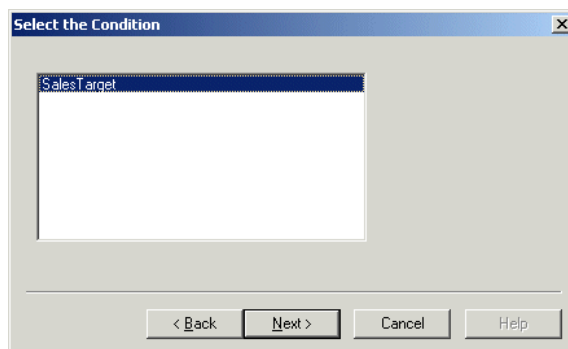
## REMOVING EXISTING QUOTAS

To remove conditions of an existing quota:

- Right click on the relevant outbound list and select **Manage Quotas.**

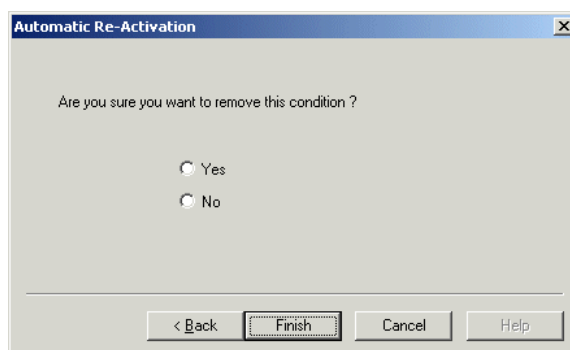- In the first page of the Wizard select ***Remove an existing Condition***.



### *Selecting the Condition*

- In the second page select the name of the condition that you which to remove and move to the Next> page of the wizard.



### *Deleting the Condition*

- Click ***Yes*** if you wish to delete the selected condition and click ***Finish***.

# RE-ACTIVATING OUTBOUND LIST WITH QUOTAS

When re-activating an outbound list that was de-activated because the predefined target set in *Manage Quotas* was achieved, a message will be displayed, reminding you that the Quota for this outbound list has been met.

*If you decide to reactivate the Quota as well, you will need to edit the Quota, before agents can take calls on the Outbound List.*

*Whether or not the quota is activated depends on the historical data for the corresponding call results held in the Phoenix_Statistics table.*