

# OUTBOUND MANAGER

# Managing Quotas

Select Timespan	×
🔿 Total	
🔿 Today	
This Week, starting	Monday
O This Month	Monday Tuesday Wednesday Thursday Friday Saturday Sunday
< <u>B</u>	ack <u>N</u> ext > Cancel Help

Summary	×
Count of ("Order") Calls >= 500 for the week, since Monday.	
< <u>B</u> ack Finish Cancel	Help



# MANAGING QUOTAS

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#### 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.

w Condition Nar	ne			X
SalesTarget				
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#### **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.

Call Results		×
Available Brochure Engineer Enguiv Solution		
< <u>B</u> ack	<u>N</u> ext > Cancel Help	



# **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.

Set the Limit	×
	FOR AL CAR
	Calls
	< <u>B</u> ack <u>N</u> ext> Cancel Help

#### **Selecting Time-span**

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

Select Timespan	×
◯ Total ◯ Today	
This Week, starting	Monday
C This Month	Monday Tuesday Wednesday Thursday Friday Saturday Sunday
< [	Back Next > Cancel Help

#### **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*.

Automatic Re-Activation
Do you want to automatically Re-Activate the Outbound Campaign at Midnight on the first day of the following week?
ি Yes ে Ng
< <u>B</u> ack <u>N</u> ext > Cancel Help



#### 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.

Summary	X
Count of ("Order") Calls >= 500 for the week, since Monday.	
< <u>B</u> ack Finish Cancel Help	

#### 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.

Select	×
Ģ	Add a new Condition
	Communication
C	C Remove an existing Condition
	< Back Next > Cancel Help

- 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*.

Select	×
	<ul> <li>Add a new Condition</li> <li>Edit an existing Condition</li> <li>Remove an existing Condition</li> </ul>
	< <u>B</u> ack. <u>N</u> ext> Cancel Help

#### Selecting the Condition

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

ect the Condit	on			
SalesTarget				
	< <u>B</u> ack	Next>	Cancel	Help

• 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*.

Select		×
	Add a new Condition	
	C Edit an existing Condition	
	Remove an existing Condition	
	- Communication and Communication	
	< <u>B</u> ack <u>N</u> ext > Cancel Help	
		_

#### 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.

Select the Conditi	on			×
SalesTarget				
	< <u>B</u> ack	<u>N</u> ext >	Cancel	Help

#### **Deleting the Condition**

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

Automatic Re-Activation	×
Are you sure you want to remove this condition ?	
C Yes	
C No	
< Back Finish Cancel	Help



# **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.