OUTBOUND
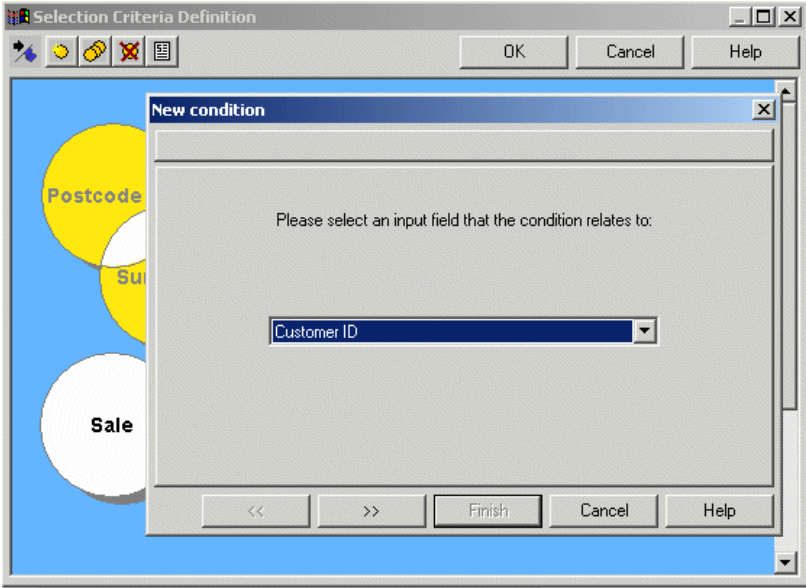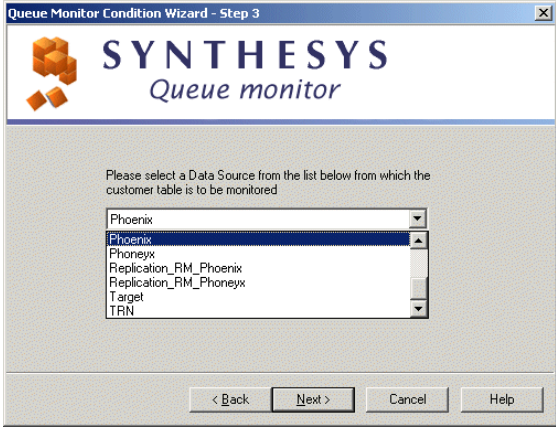
Synthesys Queue Monitor

SYNTHESYS QUEUE MONITOR

INTRODUCTION

The **Synthesys Queue Monitor** allows for calls to be removed from the queue of a selected Outbound list, if predefined conditions apply. Associated information will be added to the CRM history.

Note: Only calls with call status 'queued', 'sleeping' and 'rescheduled' will be removed from the queue.

The Synthesys Queue Monitor provides a step-by-step guide through the various actions required.

Users determine the data source, plus the table and columns within that data source and then, using fields from the Synthesys CRM table, define the selection criteria to specify which calls are to be removed from the Outbound queue.

Users can furthermore decide whether to run the call remove process immediately or at a later stage, creating a SQM report and a schedule for the report run in the Campaign Manager.

NOTE: The Synthesys Queue Monitor (SQM) is not a standard feature but needs to be purchased separately.

Opening the Queue Monitor ("SQM")

To open the Queue Monitor

- Open the Synthesys Outbound Manager.

- Add or select the required outbound list.

- Go to **Edit** on the menu bar and select *Remove Queue calls using Selective Queue Monitor* to open the Queue Monitor.
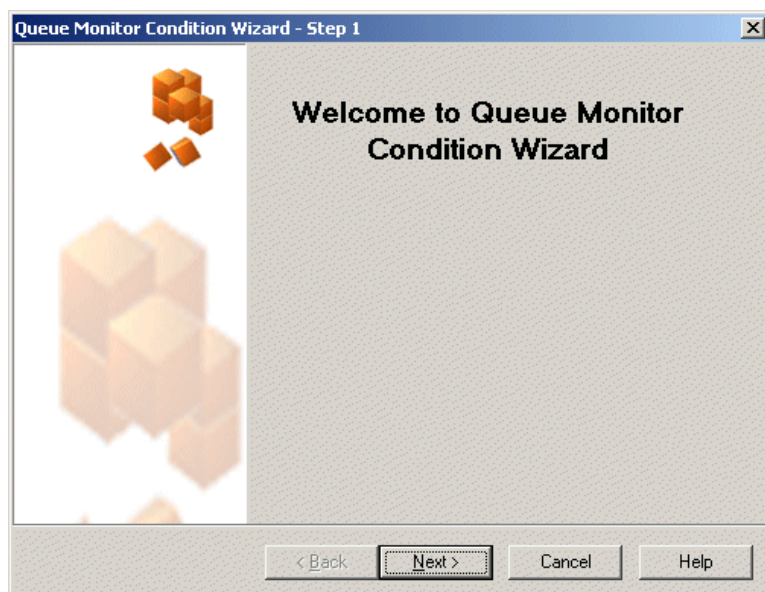
The following pages provide a step-by-step guide to the Synthesys Queue Monitor Wizard.

Synthesys Queue Monitor ("SQM")

Part 1: Data Source & Table Columns

The first part of the wizard will determine which data source and which columns in one specific table or view from that data source are to be used for the de-queue process.

Step 2: To begin with, either enter a **'New' name** for your SQM report **or** select an **existing SQM name** from the drop down menu.
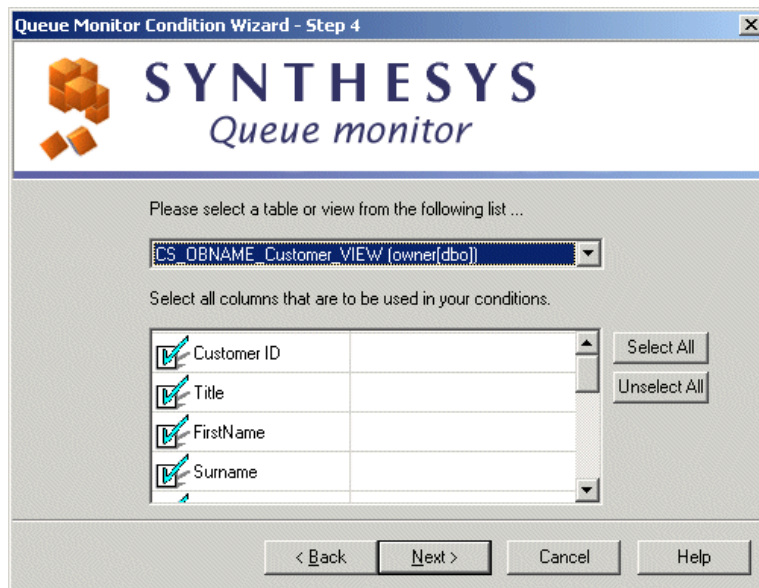

Click the 'Next' tab to continue to the next page of the wizard.

Step 3: Next, select the required data source from a list of all ODBC data sources available on the system.

Step 4: The next step involves the selection of one table or view from the selected data source, and the columns from that table/view to be used for the de-queue process.
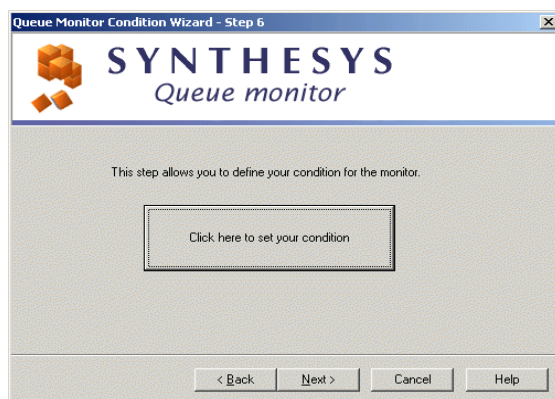

Step 5: Now, select a column that contains the Customer ID.
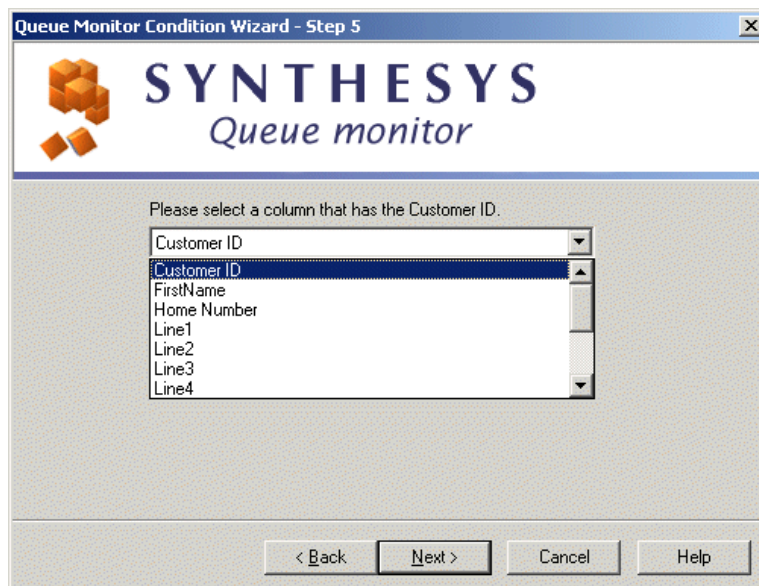
Part 2: Remove from Queue Selection Criteria

Step 6: Click the 'Selection Criteria' button, to open the 'Selection Criteria Definition' screen. Here you can specify, which calls to remove from the Outbound queue.

Note: Only calls with call status 'queued', 'sleeping' and 'rescheduled' will be removed from the queue.

The screen consists of a work area, also called "the canvas", where coloured discs will represent different conditions.

Create Condition   Duplicate Conditions   Delete Condition   View Condition Summary
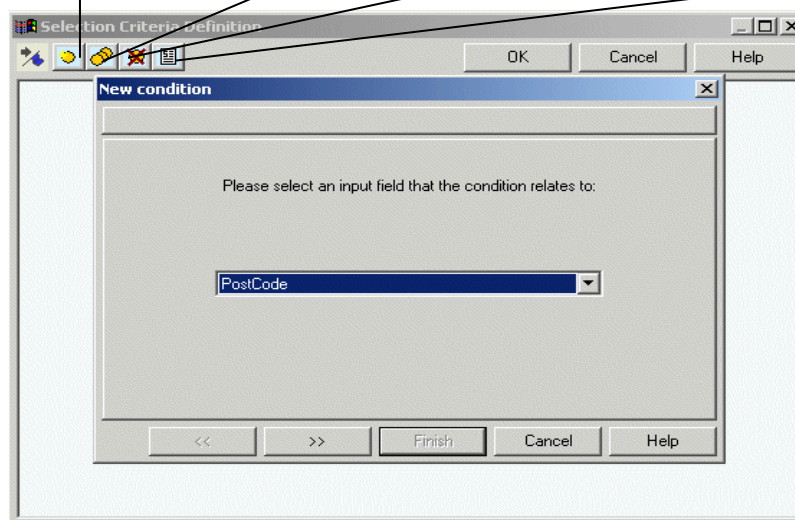
'Create Condition'. Click this icon, to create a new condition. To e**dit** existing **conditions**, double-click on the relevant condition disc.

'**Duplicate condition'.** Click this icon, to duplicate an existing condition.

'Delete a condition'. Click on the disc that you wish to delete, and then on the 'Delete condition' icon.

'View condition summary' click this icon, to view a summary of all conditions.

To open the 'New Condition' window

- Click the **'Create Condition'** icon and select the property according to which you want to define your condition. In our example we have selected 'Postcode.
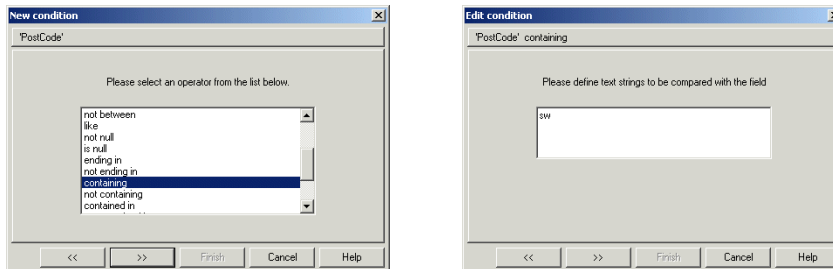
- Click the ⟩⟩ button, to move to the next screen of the wizard.

Now select the required operator, for example, **'containing'** and then enter your condition. In our example we have entered **'SW',** as we wish **to remove** all customers in the **SW area** from the queue of a selected Outbound list.
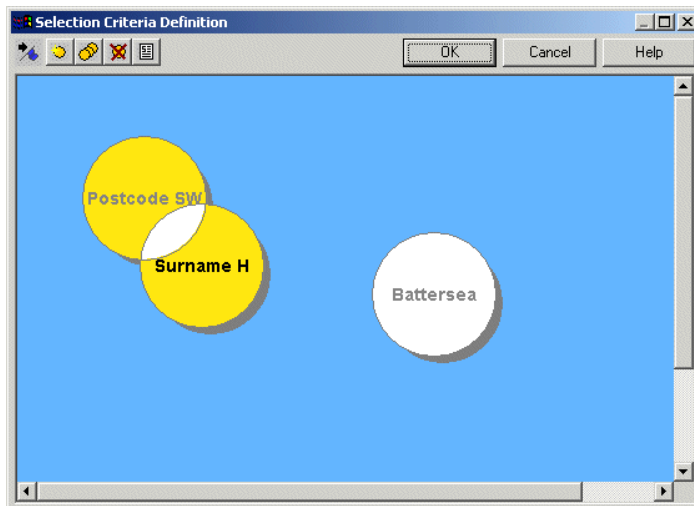

In the window subsequently displayed

- Enter a descriptive name for your condition, i.e. **'Postcode SW'**, then click 'Finish'.

The condition defined will now appear as a free-floating green disc on the canvas.

- To create another condition, click the **'Create Condition'** icon. To edit a condition, double-click on the relevant condition disc.

Ungroup discs, by clicking on the non-intersecting part of a disc, dragging it away.

If 2 discs are overlaid completely, press CONTROL on the keyboard to drag them apart.

Each condition disc can be manipulated, clicking and dragging it around the canvas.

Any discs that overlap with one or more other discs will imply a Boolean 'AND' to operate between the conditions. In our example, customers are to be removed from the queue if: (Postcode SW **AND** B2) **OR** (if the condition is 'Sale')

Click OK, to return to step 6 of the wizard and then Next, to proceed to the next part.

Part 3: Removing Queued Customers

You now need to select the Outbound list from which you want to remove the queued customers and decide whether to run the data de-queue process immediately or at a later stage, creating a SQM report and schedule in the Campaign Manager.

Step 7: Select the Outbound list from which you want to remove the customers from the Outbound queue.
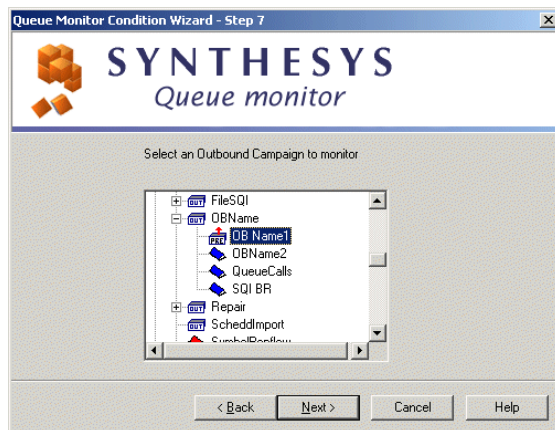
Step 8: Next, decide if you want to run the data de-queue process immediately or if you want to schedule a SQM report later in the Campaign Manager.
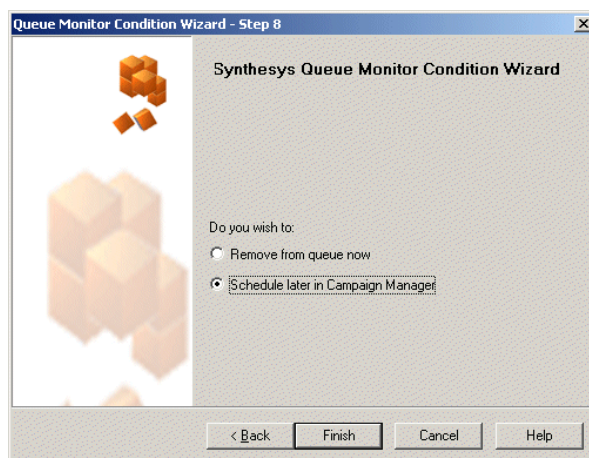
- Tick 'Remove from queue now': If you want to remove the customers queued from the Outbound queue immediately.

- Tick 'Schedule later in Campaign Manager', to remove the customers from the Outbound queue at a later stage, with a scheduled report set up in the Campaign Manager.

Please see the next section on 'Schedule a SQM Import in Campaign Manager' for information about setting up and scheduling a SQM report.

Synthesys CRM & Outbound Management

Schedule a SQM Report in Campaign Manager

If the option 'Schedule later in the Campaign Manager' has been selected, go to the Synthesys Campaign Manager and create a scheduled SQM report to remove selected customers from the Outbound queue.

- Open the *Synthesys Campaign Manager* clicking on **Reports**.

Setting up a SQM Report

In the Campaign Manager

- Locate and right click on your campaign and select '**Add Report'**.
- Enter the **Report Name**, any comments as required and a full report name (or 'None') into the 'Full Name' field.
- Select 'SQM Service' in the Report Tool field.

Next, type in brackets (< >) the name of your SQM, as entered in Step2 of the Queue Monitor wizard, into the Printer/Export File Name field:
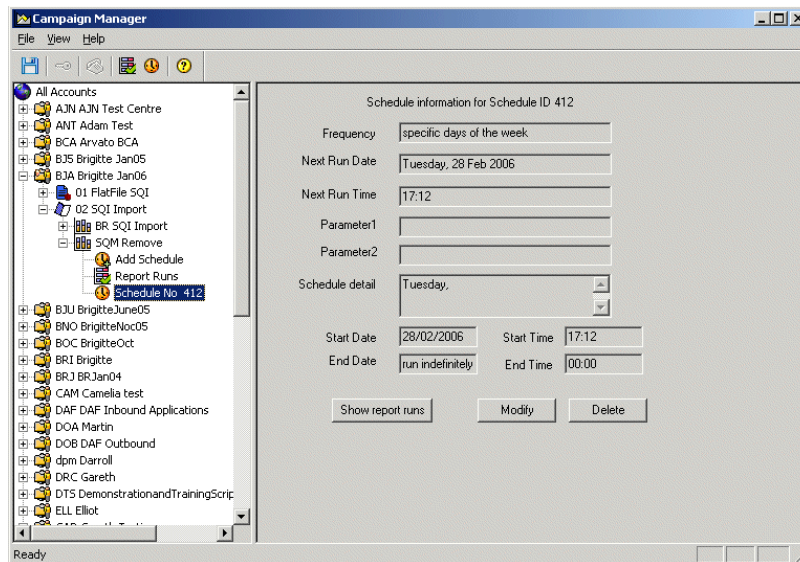
i.e. **<BRemove>.** Save your SQM report.
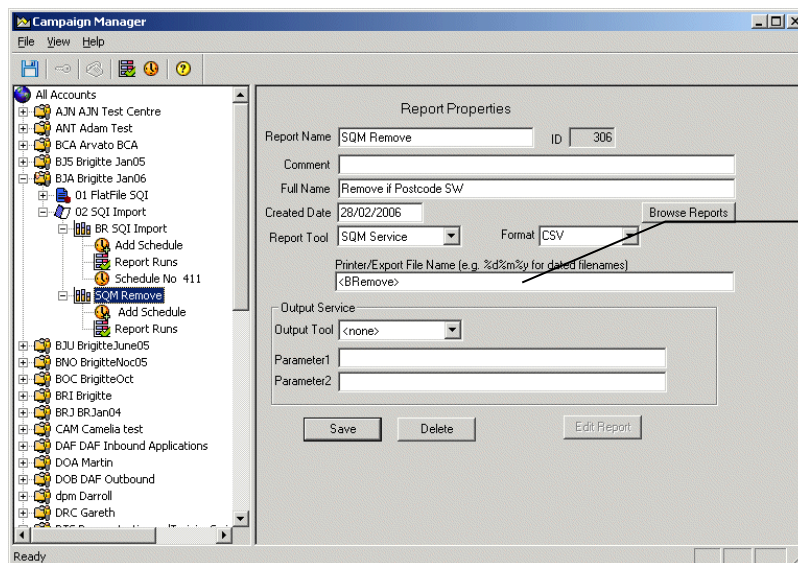
Into the Printer/Export File Name field, type in brackets (< >) the SQM name, as entered in Step2 of the Queue Monitor wizard: < BRemove>.

Scheduling a SQM Report

To add a schedule for your SQM report

- Select **'Add Schedule'**, tick the **'Frequency'**, i.e. 'Daily' and enter the time for the report run in the 'Start Time' field.

Save the schedule for your SQM report.

In our example, the SQM report will run Tuesdays at 17.12pm, removing calls from the Outbound queue.

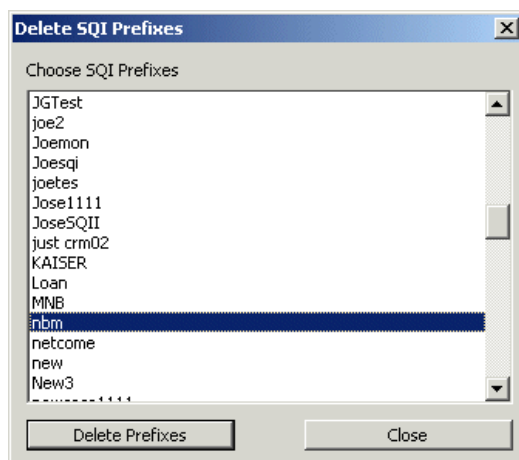To check that your SQM report has run successfully

- Go to 'Report Runs' or alternatively check the queue in the Outbound Manager.

DELETING SQI AND SQM PREFIXES

The function to delete SQI or SQM prefixes has been added to the Edit menu in the Outbound Manager.
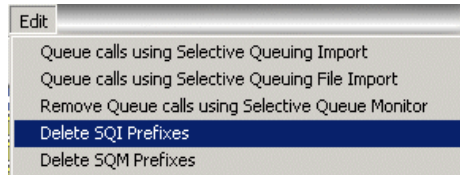
From a dialog listing either all SQI or SQM prefixes, users can select one or more prefixes for deletion.

Prefixes can only be deleted, if no live schedules are assigned for the selected SQI or SQM prefixes.

If schedules exit, they will have to be removed first and the delete request is ignored.