

# OUTBOUND Selective Queuing File Import "SQI"

lective Queuing Import Utility - File Import Step 2	
SYNTHESYS Selective Queueing Import	
Please, specify a name of source file to be imported          \\NEWBLUEDB\Synthesys\Training\VoucherID.c       Browse         Bow Delimiter:       {CB}{LF}	
Sample data from the file:	
CustomerID, Itile, FirstName, Sumame, Home, Work, Hat, Street, t A VOUCHER 1, Mr, John, Smith, 112 234 4444, 221 234 4444, Rat	
	OK Cancel Help
Postcode SW Surname H Batte	ersea



## SELECTIVE QUEUING FILE IMPORT ("SQI")

INTRODUCTION	3
THE SQI FILE WIZARD	4
Part 1: Data Input, Source File and Table Columns	5
Creating a Temporary Data Import Table	6
Data Source and Table Columns	7
Part 2: Defining Import Selection Criteria	9
Part 3: Binding Source Fields & CRM Columns	11
Part 4: Queuing Customer Records	12
SCHEDULING SQI REPORTS IN CAMPAIGN MANAGER	15
Setting up a SQI Report	15
Scheduling a SQI Report	16
DELETING SQI PREFIXES	17



### INTRODUCTION

The Selective Queuing File Import utility allows the user to import, update and queue customer records from a flat file.

The SQI Wizard provides a guide through the various steps of setting up a Selective Queuing File Import.

Users determine which file is to be used for the import. They then can define the import selection criteria, specifying which records to import and define the output of the import process, which is essentially a Synthesys CRM table and the way in which the data to be imported relates to the CRM columns.

Users can furthermore decide whether to run the data import immediately or at a later stage, creating a SQI report and schedule for the report to be run and if required customer records to be queued.



## THE SQI FILE WIZARD

To place customers to be called into an outbound list using the Selective Queuing File Import option:

- Open the Synthesys Outbound Manager.
- Select the required Outbound list and go to Edit on the menu bar.
- Select Queue calls using Selective Queuing File Import to open the SQI Wizard.

The SQI Wizard provides a step-by-step guide through the process of importing or updating data, using the Selective Queuing File Import.

Please see the following pages for details.



#### Part 1: Data Input, Source File and Table Columns

#### **Selecting the Data File**

The first part of the wizard will determine which data file is to be used for the import.

**Step 1:** SQI Welcome screen. Click the *Next* tab of the SQI Welcome screen to move to the next page of the Wizard.

**Step 2:** The next step involves the selection of the source file. Click the Browse button, to select the file, choose a *Row Delimiter* if required and view the data that you are about to import.



**Note:** The name of the source file needs to contain the full UNC path and therefore contain \\MachineName\Drive\....

**Step 3:** Now, select the delimiter that separates your fields, i.e. 'Tab', 'Semicolon' or 'Comma' and view the effect in the *Sample data from the list* section.

SYN Sele	<b>ТН</b> ctive (	ESY Queuein	<b>S</b> g Impor	rt
Choose the delimi	ter that separat C Semicolo is field names ie file:	es your fields: on ( Comma	3	
CustomerID VOUCHER_1 VOUCHER_2	Title Mr Ms D-	FirstName John Betty T	S S W	

To display the column headings contained in the File that you import, tick the 'First row contains field name' box.



#### **Creating a Temporary Data Import Table**

You now need to create a temporary database table where the data from your flat file will be stored initially, before you choose the destination data source later on in the wizard.

**Step 4:** This is where you enter the name of the table in which the data from your flat file will be stored temporarily.

Selective Queuing Import Utility - File Import Step 4		
	Please specify a table name VoucherID Drop the Table First	
	< Back Next > Cancel Help	

**Steps 5 & 6:** Show the process of importing the flat file data, and that the temporary table has been created.

Selective Que	uing Import Utility - File Import Step 6
	<b>SYNTHESYS</b> Selective Queueing Import
	You have successfully completed SQI File Import Wizard. The file you chose has been successfully imported. To close this wizard click Next. Summary: Source file: \\NEWBLUEDB\Synthesys\Training\VoucherID.cs Destination Table: VoucherID
	< Back Next > Cancel Help



#### **Data Source and Table Columns**

Having successfully completed the import of the flat file data to the temporary table, you now need to create or select a name for your SQI import, select the Database with the temporary table that you have created and specify the columns to be used in the import.

Step 7: Enter a new name for your SQI import or select an existing SQI name from the drop down menu.

Selective Queuing Import Utility - Step 7	
SYNTHESYS Selective Queueing Import	
Please select a SQI prefix for this import. SQI Name © New BRFileSQI © Existing	When selecting "Queue Calls using Selective Queuing File Import" you will be prevented from picking up a Queue Only SQI name. A message will inform you that <i>Queue Only</i> prefixes are not allowed for file imports.
< Back Next > Cancel Help	

Step 8: This dialog shows the input action for the File import. The Import and Queue or Queue Only option will be greyed out, as the action associated with a new file SQI import has already been selected, i.e. Import and Queue.

Selective Queuing Import I	Jtility - Step 8	×
<b>S Y</b>	NTHESYS elective Queueing	g Import
Please, sele ©	ct an action you would like to perform Import and Queue Queue only	
	< Back Next >	Cancel Help



**Step 9:** Now, select the required data source from the list of ODBC data sources available on the system. You need to select **Phoenix**, as this is the location of the temporary table that you have created.

Selective Que	uing Import Utility - Step 9		x
	SYNTHES Selective Queue	<b>' S</b> ing Import	
	Please select a data source from the list below used as the source for this import. Phoneyx	which is to be	
	< Back Next >	Cancel	Help

**Step 10:** Your temporary table will be displayed automatically. You can now tick the columns from the table that you wish to use for the import.

Selective Queu	ng Import Utility - Step 10
	<b>SYNTHESYS</b> Selective Queueing Import
	Please select a table or view from the following list VoucherID (owner[dbo]) and then select all columns that are to be used in the course of the import either for selection or output.  CustomerID  First Name  Select All Unselect All  Select All Unselect All  Select All  Se
	< Back Next > Cancel Help

**Step 11:** The first column contains the selected column names, the second column ('Alias column') an editable field in which you can type any user-friendly names that you may wish to associate with the selected column names.

Selective	Queuing Import Utility - Step 11 SYNTHE Selective Qu	SYS ieueing Import	
	In the "Alias Column Names" column below, please type in any user-frien names that you may wish to associate with the selected column names ar press enter key to save the change. Selected Column Names CustomerID CustomerID Title Title Title First Name First Name Sumame Sumame		
	< III III < Back	Next > Cancel Help	

To change the name displayed in the Alias column, click into the field and type in the user-friendly name.

You then must press enter after each name change, to commit the changes made in the Alias column.



#### Part 2: Defining Import Selection Criteria

The 'Import Selection Criteria' allow you to choose which records to import, by specifying a set of conditions. If you wish to import all records, skip this step by clicking the 'Next' tab.

**Step 12:** Clicking the 'Selection Criteria' button will open the 'Selection Criteria Definition' screen.



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



- **Create Condition'.** Click this icon, to create a new condition. To edit existing **conditions**, double-click on the relevant condition disc.
- Solution: Ouplicate 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 create a new condition

- Click the Create Condition <sup>2</sup> icon.
- In the *New Condition* window select the property to define your search using any fields available in your CRM (for example the *Postcode* field.
- Click the button to move to the next screen of the wizard to select the required operator, i.e. containing and then type SW to specify that you wish to queue all customers in the SW area.

New condition 'PostCode'			×	Ne	ew cond 'PostCod
Please sel	ct an operator from th	e list below.			
not between like not null is null ending in		<u> </u>			
not ending in containing not containing contained in		<b>-</b>			
×	Finish	Cancel	Help	-	

ew conditi 'PostCode'	on containing	
	Please define text strings to be compared with the field	
	sw	
	<<   >>>   Finish   Cancel   Help	

We are now prompted to enter a name for our condition, i.e. 'Postcode SW'.

Once the condition is defined and a name has been entered, it will appear as a free, floating disc on the canvas.

- To create another condition, click the 'Create Condition' ڬ icon.
- To edit existing conditions, double-click on the relevant condition disc.



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. For example, customers are to be gueued if:

(Postcode SW AND Surname begins with H) OR (Borough = Battersea)

Click OK, and proceed to the next step.



#### Part 3: Binding Source Fields & CRM Columns

This part defines the output of the import process, which is essentially a Synthesys CRM table and the way in which the input columns relate to the CRM columns.

**Step 13:** Selection of an Outbound list. This will automatically determine the CRM prefix to be used. 'Next' will move you to the next page of the wizard.



**Step 14:** The next step involves assigning values to the fields defined in steps 10 and 11 with actual CRM columns.

Selective	Queuing Import Utility - St	ep 14	X	
SYNTHESYS Selective Queueing Import				
Assign values to the destination columns. Note: Values shown in red no longer exist in the califiow and must be replaced				
	Customer ID(P001)	CustomerID	-	
	First Name[P002]	Title	E	
	Sumame[P003]	Sumame		
	Telephone[P004]	FirstName	_	
	•	4		
Calculations				
< Back Next > Cancel Help				

To change a Source field, click on the relevant field in the Source column and select the required field from the drop down menu.

The Source column is one of the aliases defined in step 11 (Part1), the Destination column is the CRM table.

The Wizard will also potentially allow for calculations based on the Source fields to be used. This however is not available in the current version.



#### Part 4: Queuing Customer Records

This part is concerned with the parameters governing the queuing of Outbound calls.

**Step 15:** If your CRM contains more than one telephone number, select the telephone number that is to be queued and dialled first, in the event of the campaign being turned into a Predictive Outbound list.

Selective Queuing Import Utility - Step 15
SYNTHESYS Selective Queueing Import
In the event of this Outbound List being converted to a Predictive Campaign which telephone Number would you wish to use? Home[P004] Home[P004] Work[P007]
< Back Next > Cancel Help

**Step 16:** Defining restrictions to be imposed when queuing calls, based on previous contact with a specific customer.

To *Exclude* customers from the call queue:

• Place a tick into the relevant box of possible call outcomes and if required select a date as appropriate.

Selective Queuing Import Utility - Step 16	x
SYNTHESYS Selective Queueing Import	
Do not queue call to those who already had any of the following types of call  Finished Call - Inbound Aborted Call - Answer phone Aborted Call - On not call Aborted Call - Do not call Aborted Call - No Answer Aborted Call - Rescheduled Aborted Call - Unobtainable Aborted Call - Wrong Number When?  Ever C Since 17/11/2014	
< Back Next > Cancel Help	



**Step 17:** This option allows you to check for possible duplicates in the queuing process, i.e. to check that no call is already queued for this person.

Note: Checking for duplicates is advisable, but can take a long time to perform.

Selective Queuing Import Utility - Step 17	
🗳 SYNTHESYS	
Selective Queueing Import	
A call relating to some of the records that are to be imported may already be queued. This means that these people will be called twice. Do you wish to check for such duplicates in the call queue and exclude them?	
Check for duplicates (for ob list 'BDJ DB Import' only)     Check for duplicates for exampling 'DB Import' only)	
Check for duplicates (for Campaign DB import only)     Check for duplicates (for CRM Prefix 'BDJDBI' only)	
C Ignore check	
Clear current queue     Clean customers against the Do Not Call List     Update all fields	
< Back Next > Cancel Help	-

Do <u>NOT</u> tick the 'Update all fields' box, if you only wish to update some of the selected CRM fields.

Select Option

Check for duplicates (for Outbound list 'Outbound list Name' only)

Check for duplicates (for campaign 'Campaign Name' only)

Check for duplicates (for CRM Prefix 'Customer\_Prefix' only)

Ignore check

Clear current queue

Clean customers against the Do Not Call List

Update all fields

#### Description

To check the current Outbound list selected for duplicates.

To check all Outbound lists associated with the selected Campaign for duplicates.

To check all Outbound lists that use the same CRM prefix.

If you do not need to check for duplicates, for example queuing calls for a new campaign.

To remove customers from the selected outbound list, before queuing calls.

To check the Phoenix\_DoNotCallList table for telephone number and to remove customers from the call queue if a match is found.

Tick to update all fields within your CRM, do NOT tick, if only selected fields are to be updated.



**Step 18:** Finally, the last step gives you the option to run the import immediately or at a later stage and gives you the option not to queue calls in the Outbound Manager.

- Import now
- Schedule later in Campaign Manager
- Do not queue calls

Selective Queuing Import Utility - Step 18	
SYNTHESYS Selective Queueing Import	
SQI Prefix SQI_1220 SQI Name BRFileSQI Do you wish to:	
< Back Finish Cancel Help	

Remember to make a note of the SQI name entered, as you will need the SQI name, when scheduling your SQI report in the Campaign Manager.

- Tick **Import Now** to queue the customers immediately. The queue process will start in the background and after a short while all relevant calls will be displayed. To refresh the Outbound Manager, press the F5 key.
- Tick Schedule later in Campaign Manager to queue customers at a later stage, running a SQI report. Make a note of the SQI name entered, as you will need the SQI name, when scheduling your SQI report.
- Tick **Do not queue calls**, if you want to run the CRM Import without queuing customers



If you tick the Schedule later in Campaign Manager option, make a note of the SQI name entered, or copy it, as you will need the SQI name, when setting up your SQI report and schedule.

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



## SCHEDULING SQI REPORTS IN CAMPAIGN MANAGER

To set up a SQI report and schedule in the Campaign Manager.

• Open the Synthesys Campaign Manager clicking on Reports.

#### Setting up a SQI Report

In the Campaign Manager:

- Locate and right click on your campaign and select Add New Report.
- Enter the *Report Name*, any *Comments* as required and type a name into the *Full Name* field.
- Select SQI Service in the Report Tool field.
- Next, type in the SQI name as entered in Step 6 of the SQI Wizard into the Printer/Export File Name field, for example *BRFileSQI*.
- Save your SQI report.

🔄 Campaign Manager				
File View Help				
Convert Pies Solved Sol ()     Development Fields     Development     Development     Development     Development     Development				
Ready	NUM			



#### Scheduling a SQI Report

To add a schedule for your SQI report:

- Locate and right click on your report in the *Campaign Manager* and select Add Schedule
- In the *Schedule Wizard*, select a start and end date and the *frequency* of the report run.
- Save the schedule for your SQI report.

In our example, the next SQI report will run on Monday 17<sup>th</sup> November at 18:30.

Schedule Summary	YNTHESYS Selective Queueing Import	
You have now so information below reports. Frequency Next Run Date Next Run Time Parameter 1 Parameter 2 Schedule detail	heduled BR Scheduled SQI report to run. Please check that the is correct, particularly the next run date and time fields for timed every set number of days Monday, 17 Nov 2014 18:30 Every 1 days	In our example, the SQI report will run daily, at 18:30.
	<back next=""> Finish Cancel</back>	

To check that your SQI report has run successfully

- Go to *Report Runs* or alternatively check the queue in the Outbound Manager.
- In the Change Queue Item State dialog select the queue state that you wish to display for the selected calls.



## DELETING SQI PREFIXES

The function to delete SQI prefixes has been added to the Edit menu in the Outbound Manager.

Edit
Queue calls using Selective Queuing Import
Queue calls using Selective Queuing File Import
Remove Queue calls using Selective Queue Monitor
Delete SQI Prefixes
Delete SQM Prefixes

From a dialog listing all SQI prefixes, users can select one or more prefixes for deletion.

Delete SQI Prefixes	×
Choose SQI Prefixes	
JGTest	▲
joe2	
Joemon	
Joesqi	
Joetes	
JoseSOII	
just crm02	
KAISER	
Loan	
MNB	
nbm	
netcome	
new	
New3	-
Delete Prefixes	Close

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

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



NOTES