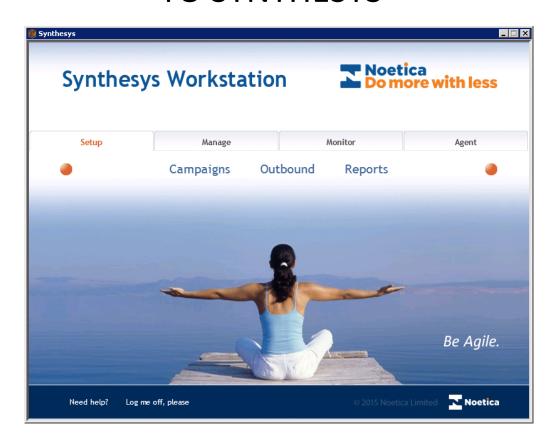
INTRODUCTION TO SYNTHESYS





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Software Release Version 4.4

Document Version: 1.1

Last updated October 2015

Prepared by Brigitte Reimer

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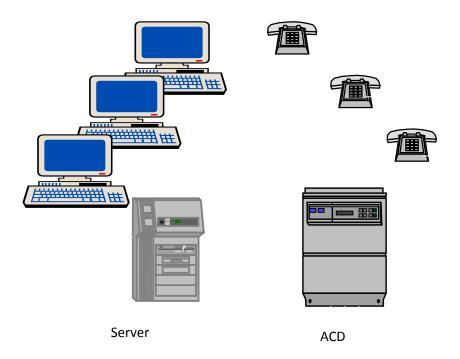
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SYNTHESYS IN THE CALL CENTRE



Synthesys combines the resources of the Campaign Editor, the agent, the computer and the telephone to optimise the process of call handling.

A new campaign is discussed with a customer and a callflow for the campaign is set up in the Synthesys Campaign Editor. A DDI (Direct Dial In) telephone number is attached to the campaign. When a caller phones the number, for example in response to an advertisement, the call comes in to the call centre and is passed to the ACD (Automatic Call Distribution system). The ACD automatically directs the call to the next available agent's telephone.

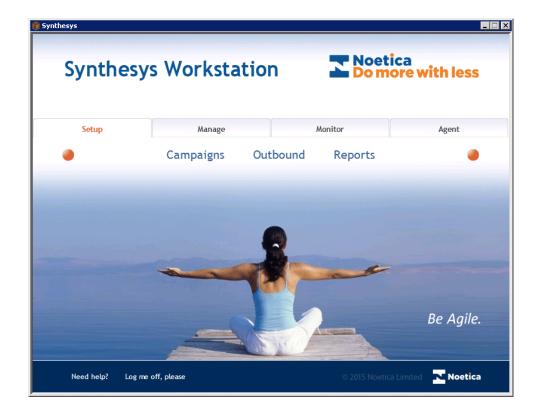
Using Computer Telephony Integration (CTI) the ACD is linked to the Synthesys software, located on the server. Synthesys associates the incoming call with the appropriate campaign callflow. As the agent answers the call the relevant callflow is displayed or popped to their computer screen.

Synthesys guides the agent through the callflow and fully prompts them at each question. Information collected from the customer is stored on the Synthesys database, on the server.

We will now take a closer look at the individual components of Synthesys and their functions.



COMPONENTS OF SYNTHESYS



Synthesys is a comprehensive software package that deals with all aspects of the management of the call centre. It consists of a number of complimentary modules which enable you to design and build callflows, handle calls, track and monitor call centre activities, maintain staff details and schedule the running of reports.

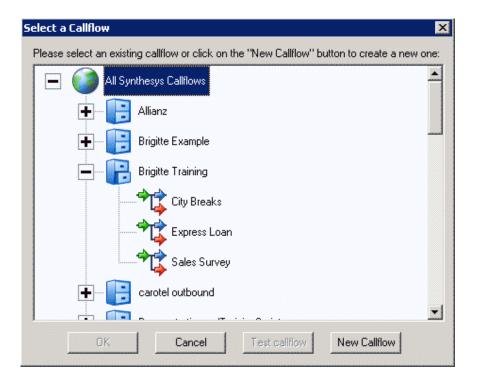
When you first enter Synthesys you will be presented with the Synthesys main screen. This controls access to all the different components of Synthesys.

Each component is password protected and can only be accessed with the appropriate level of permission, assigned to individual users in the Synthesys Personnel Manager.

We will look briefly at all the components in Synthesys.



THE EDIT ROOM



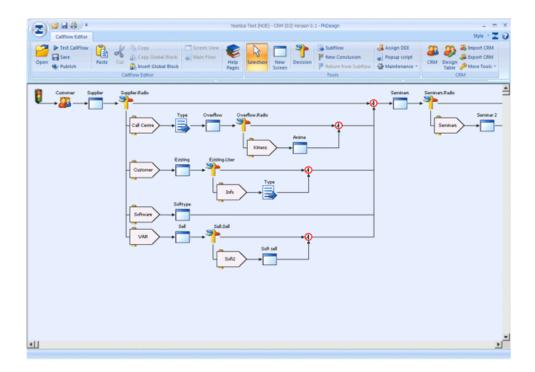
The **Edit Room** is used to manage customer accounts and campaigns.

Each customer is set-up with their own account and under this account a range of campaigns, in the form of callflows, can be developed. All accounts are stored within the Edit Room.

The *Filing Cabinets* represent customer accounts and *Folders* represent individual campaigns. Via the *Select a Callflow* screen, existing callflows are selected and new callflows can be created.



CAMPAIGN EDITOR



A **Callflow** drives the conversation between an agent and a caller. It achieves this by displaying prompts to agents showing a question to ask, or information they may require during the course of the conversation.

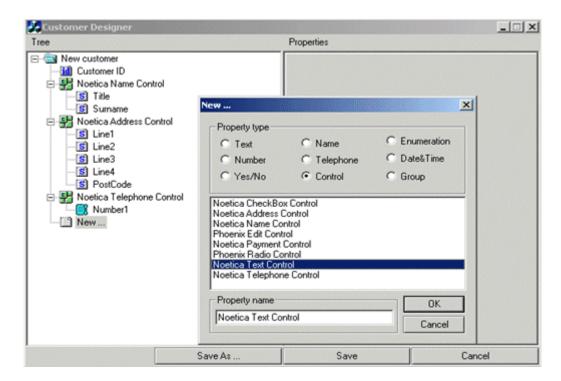
As you can see from the screen-shot, the Campaign Editor is very visual. Simple, point-and-click and drag-and-drop interfaces enable you to design, implement and modify a callflow with the minimum of technical know-how.

Furthermore, you can display background colours and insert a branding image either for the whole campaign or for individual sections and customize the size and colour of Noetica ActiveX controls.

When a callflow is saved, the designer automatically creates tables in the Synthesys database, which will later be used to store all the information taken during a call.



CUSTOMER RELATIONSHIP MANAGEMENT



The **Customer Relationship Management** module is designed to allow access to both customer profiles and customer histories, providing the agent with the best possible help in dealing with customers' queries and requests.

It enables call centre management to link their existing Synthesys callflows into legacy systems already in use and create the means to track customer interactions in both in-bound and outbound calls.

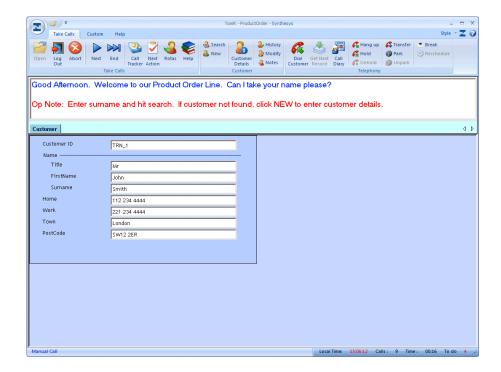
Customer Relationship Management fully integrates with the other functions of Synthesys. To the agent the Customer Relationship Management module behaves like another section of the callflow. Within this section the agent is able to search for existing customers and once the customer has been identified all information previously collected can be accessed and will be available to the agent throughout the call.

Agents can also attach relevant notes or documents to a customer's record.

In addition to searching for customer details and viewing a customer's history, agents can create new customer records following prompts in much the same way as they would do in a normal callflow run.



AGENT MODULE



The **Agent** module is used to run callflows that have been created using the Campaign Editor. The callflow guides the agent through the call from the start of the conversation through every stage of the call until the end is reached.

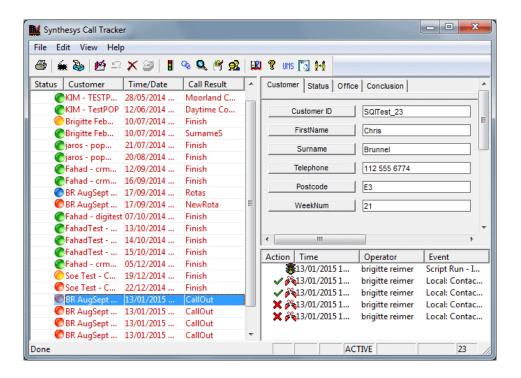
Sections, together with dialogue prompts ensure that the agent asks all questions relevant to a campaign and that the information is collected and entered in a correct and consistent format.

Access to Help Pages, the Intranet or World Wide Web enable agents to respond quickly and in a knowledgeable way to a caller's enquiries regarding a company, it's products and services.

When an agent is not currently in a call, the **Agent Dashboard** can be set to provide statistical information about the calls taken. This includes real time information, displaying the running total of inbound and outbound calls, as well as idle, preview, talk and wrap times. The *Dashboard* can furthermore be configured to include commission due to the agent, based on a percentage of the total amount of sales.



CALL TRACKER - SYNTHESYS WORKFLOW



The **Call Tracker (Synthesys Workflow)** is used by agents to follow up calls that require further actions, for example, contacting a doctor in an emergency or paging an engineer or the call can be passed to another department.

The *Call Tracker* can be set up to provide the agent with intelligent advice regarding the next appropriate action to handle each situation effectively. Each stage in the sequence of events is under the control of *Synthesys*, prompting the agent at the appropriate time with the next course of action and a choice of alternatives.

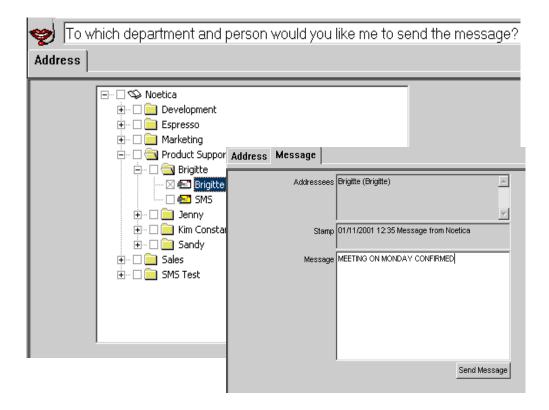
The Call Tracker also allows existing call information to be retrieved, viewed and amended if and when necessary.

The Teams Augmented Call Tracker (TACT) enables the filtering of active calls according to teams so that agents will only handle calls from campaigns assigned to their team.

The Teams Augmented Call Tracker is also a start to a workflow system, as calls can be moved between teams using the 'Pass to Team' action. An agent taking an Inbound call can pass the callflow, together with call details to the sales team, who in turn can pass it to the next relevant department.



UNIFIED MESSAGING SERVICE (UMS)



The **Unified Messaging Service (UMS)** allows agents to send e-mail, SMS, fax or pager messages to customers listed in an address book. Messages can be sent as part of the callflow or via the Call Tracker. Using UMS in the Call Tracker, agents can also send Instant Messages to persons not included in the address book.

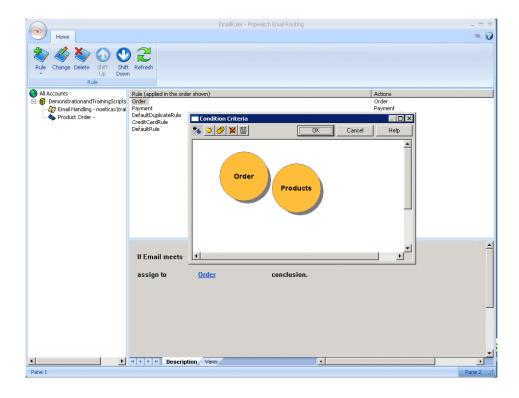
UMS is set up using two ActiveX controls, the *UMS_Tree control* for maintaining the UMS address books and the *UMS_Message control* to input the message to be sent to people listed in the UMS tree control.

Alternatively, agents can use the *UMS MessageX* control to send a message to a recipient via email or SMS. Messages can be sent automatically on completion of taking a call, or agents can select a date and time to send the message using a diary page. In addition, previously sent messages can be retrieved and resent.

The Unified Messaging Service (UMS) and the UMS MessageX control are not standard features but need to be purchased separately.



EMAIL HANDLING



The **Email** module enables users to route incoming emails to different teams, dependant on words or phrases contained within the email.

Email Handling is used in conjunction with the Noetica *Popwatch* control, which is configured in a Synthesys callflow entering valid email account details and ticking the *'Enable Credit Card Checking'* option, if this rule is to be applied.

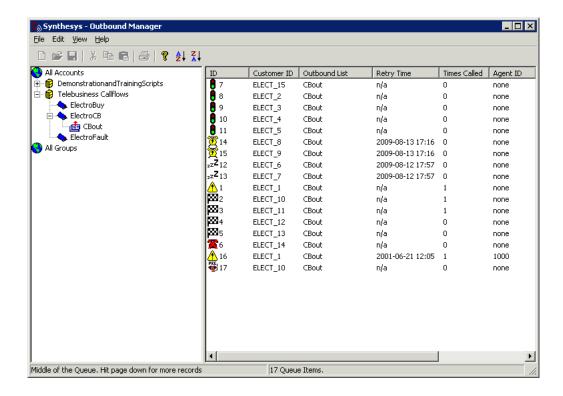
As part of the set up, the required branches, conclusion points and teams are created, to determine the routing of emails and the team an email will be assigned to.

When an email is retrieved from the email server, the routing engine will check each of the rules shown in the list in turn, from top to bottom. The first rule that applies will be used to determine the route of the email.

The Email Handling is not a standard feature but needs to be purchased separately.



SYNTHESYS OUTBOUND MANAGER



In the **Outbound Manager** you can attach *Preview* and *Predictive Outbound lists*, as well as *SMS* and *Email lists* to any callflow that has been assigned a CRM (Customer Relationship Management).

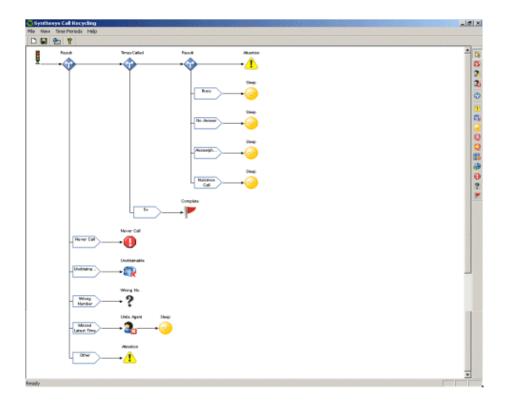
You can specify the date and time frame during which calls should be taken and by which agent and when SMS and Emails should be sent. Records will be placed in the outbound queue according to the priority assigned. Outbound calls can be activated and deactivated at any time and account and campaign details can be viewed whenever required.

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.

Outbound Groups are used to present agents with a combination of calls from multiple call lists of multiple campaigns. For each outbound list within a group, a weighting can set to determine the ratios of calls to be made.



SCRIPTED CALL RECYCLING



Using **Synthesys Scripted Call Recycling**, simple and complex recycling rules can be created utilizing a graphical script, built much like a Synthesys callflow.

Decisions to enable branching and a range of icons can be dropped anywhere in a *Recycling script*, determining the type of action to be taken on a call. Every recycling rule ends up in a conclusion, specifying what should happen to the call next.

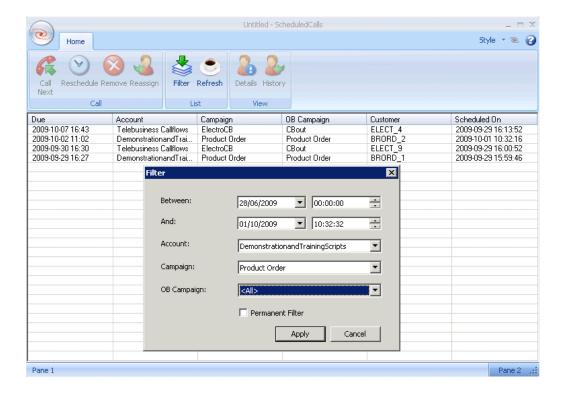
Recycling rules allow for calls to be switched between *Preview, Predictive, SMS* and *Email* outbound lists as part of a full contact strategy.

The options *CRM Data* and *Priority* in the Synthesys Recycling Designer enable users to make recycling decisions based on CRM information and the call priority setting in the Phoenix_Queue table.

Users can create their own *template of rules* that best fit the requirements of their Call Centre. These template recycling rules will then be applied automatically to any new outbound list that is set up.



AGENT CALL DIARY



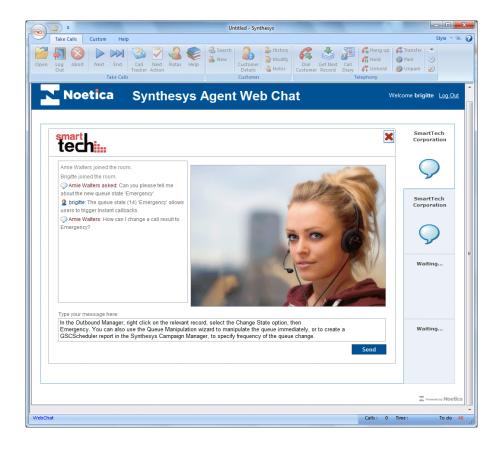
The **Call Diary** allows each agent to view and manipulate outbound calls that are currently scheduled to them.

Looking at the list of rescheduled calls, agents can see related account, campaign and outbound list details, the date a call was rescheduled and when it is due to be taken. In addition, agents can view CRM information, including customer details and associated history events.

Agents can then make an informed decision of how to deal with the individual calls. They can initiate a call immediately, reschedule it for a later date and time, reassign it to another agent, or in some instances, remove the call from the outbound list.



SYNTHESYS AGENT WEB CHAT



The **Synthesys Agent Web Chat** application is hosted on the clients' webserver and can be branded according to clients' specification.

When installing web chat, Noetica will create the web chat CRM to be used, and configure the number of web chats that agents can deal with at any one time.

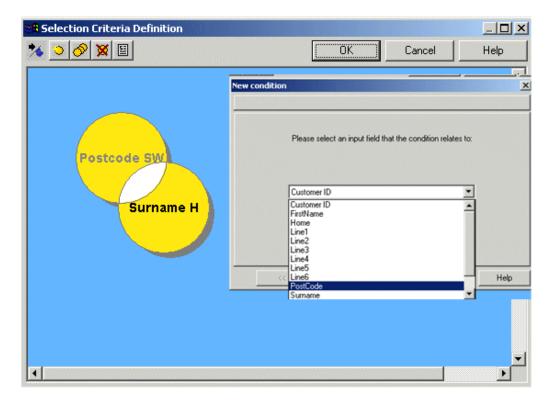
Users launch the Web Chat sign-in page from the Clients' website by clicking the **Web Chat** link or button. When clicking the *Start Chatting* button the Synthesys agent web chat screen is launched as a callflow to the agent's workstation. Multiple web chats can be enabled.

Agents have access to web chats if the *Web Chat* icon has been added to their team. Teams may contain inbound, outbound (preview) and web chat campaigns. Agents that are not currently in a call are able to receive a web chat call, which will put them *on break* so they will not get any telephone calls. When the web chat has ended agents will be taken off break and can receive telephone calls again.

Customer information and the transcript of the web chat can be viewed via the history page of the web chat CRM. For reporting purposes, web chat records are also stored in the *Phoenix_Statistics* and *Phoenix_WebChat_Campaign* tables.



SELECTVE QUEUING IMPORT (SQI)



Using the existing Synthesys CRM and Outbound mechanisms, the **Selective Queuing Import** ("SQI") and the **Selective Queuing File Import** utility, you can import, update and queue customer records from an external database, or from a flat file.

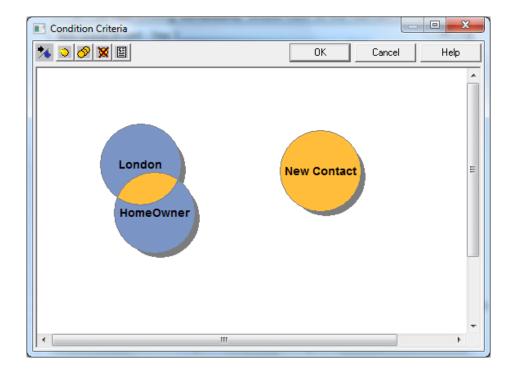
The respective SQI Wizard guides you through the various steps of setting up a Selective Queuing Import.

You determine the file or data source and the columns in that data source that are to be used in the import, define the import selection criteria and the type of duplicate checks that should be applied.

The data or file import can then be run immediately or at a later stage, creating a SQI report and schedule in the *Campaign Manager*.



WEB QUEUING - THE WEB QUEUE WIZARD



The **Web Queue wizard** in the Synthesys Outbound Manager enables users to specify queuing conditions based on CRM data to determine into which outbound list incoming web leads are to be placed.

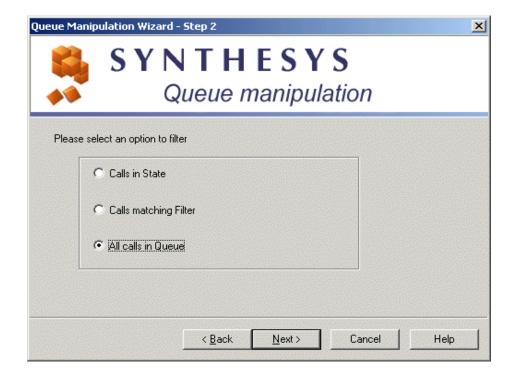
The Web Queue wizard is used in conjunction with the **CRM Web Service**, the **Rules Engine Web Service** and the **Dialler Web Service**.

This allows the client technical team to set up a Web Service call that never changes, but then gives the Call Centre the ability to direct these incoming web leads into different outbound campaign lists based on a set of CRM criteria that can be changed, as required.

The wizard can be opened via the *Edit menu* and selecting the *Web Queuing* option.



QUEUE MANIPULATION WIZARD



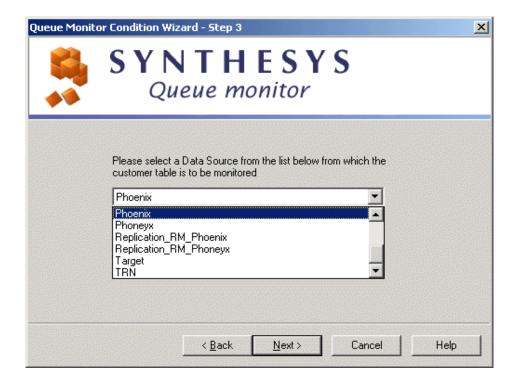
Using the **Bulk Queue Change** option, queued items can be manipulated for all or selected outbound call lists.

The *Queue Manipulation Wizard* provides a step-by-step guide through the available options 'Calls in State', 'Calls matching Filter' and 'All calls in Queue'. Supervisors can for example change the state of all sleeping calls back to queued, or move all calls that match a defined criteria from a one Outbound list to another.

Changes can be implemented immediately, or users can create a *GSCScheduler* report in the Synthesys Campaign Manager, to determine the time and date for the implementation of changes using the *Global State Change Scheduler Service*.



SYNTHESYS QUEUE MONITOR



Using the **Synthesys Queue Monitor**, queued customers with predefined conditions can be removed from the queue of a selected outbound list. Associated information will be added to the CRM history.

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

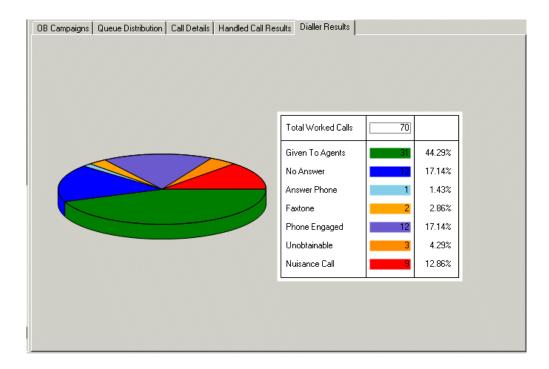
Users determine the data source, plus the table and columns within that data source. Using fields from the Synthesys CRM table, users then define the selection criteria, specifying which records are to be removed from the outbound queue.

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

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



NOETICA PREDICTIVE DIALLER

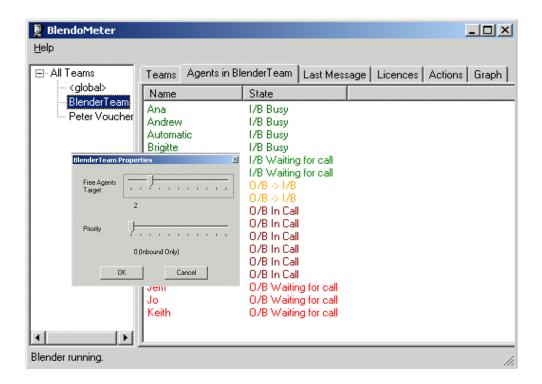


The **Noetica Predictive Dialler** receives precise information from within the callflow about the progress of each agent through a campaign. The Predictive Dialler thus knows, when agents are about to become free and uses this information to calculate the number of calls to dial and to place into the work queue for agents to action.

Since the dialler is fully integrated with callflow scripting and shares the same database, amalgamated reports can be produced. Interactive Web enabled monitoring tools provide continuous live statistics on the performance of the dialler and the call centre, and up to the minute reports in a browser. Extensive Web enabled administrative tools reduce the administrative work required to run predictive campaigns.



INBOUND & OUTBOUND CALL BLENDING



Call Blending is used to blend Inbound and Outbound calls. The Blender checks the call centre status every five seconds. It relies on the Predictive Dialler for all its information.

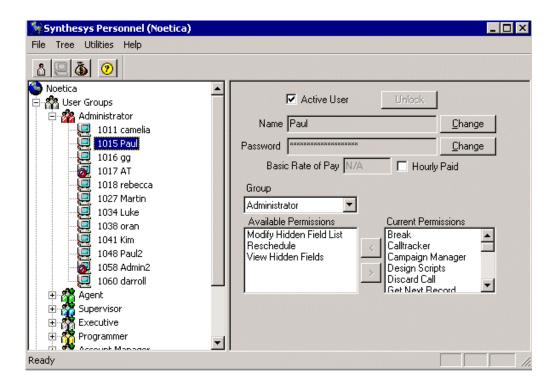
You can choose the number of agents that should be available to take Inbound calls for each team. If too many agents are waiting for Inbound calls, they are given some Outbound work. If there are not enough agents waiting for Inbound calls, some agents working Outbound are moved back into Inbound.

When Blending is installed, ALL teams will initially go to 'Inbound' mode by default, when they log on. You must override this using the BlendoMeter for each team to make it capable of taking Outbound calls.

Call Blending is not a standard feature but needs to be purchased separately.



PERSONNEL

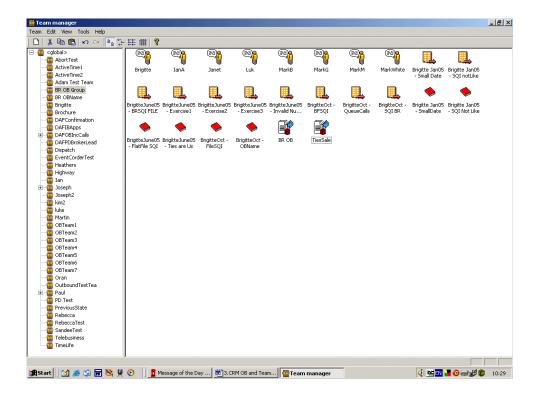


Synthesys Personnel is used to set up and maintain user information, including staff records, user groups, user accounts and wage run details.

This module also controls user permissions, determining the extent to which individuals can use the Synthesys system.



THE TEAM MANAGER

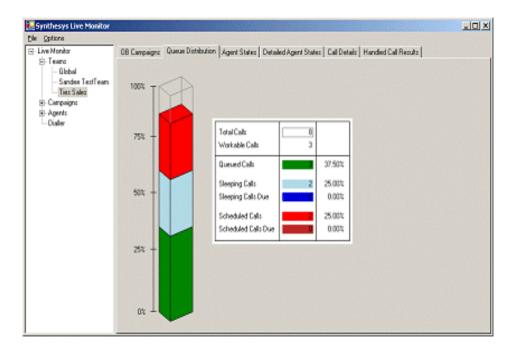


The **Teams** module is used to manage your agents and campaigns. Here, you can assign individual agents to handle particular *Inbound* or *Outbound* calls, reflecting the skill level and expertise of the agents.

The *Team Manager* also provides an *Idle* feature that can be set to present the next preview outbound record to the agent automatically, after a preset idle period. This allows inbound and outbound calls to be blended to selected agents helping to balance the workload within the within the call centre.



SYNTHESY LIVE MONITOR



The core function of the **Synthesys Live Monitor** is to provide *real-time* information of call centre activities for call centre supervisors and managers.

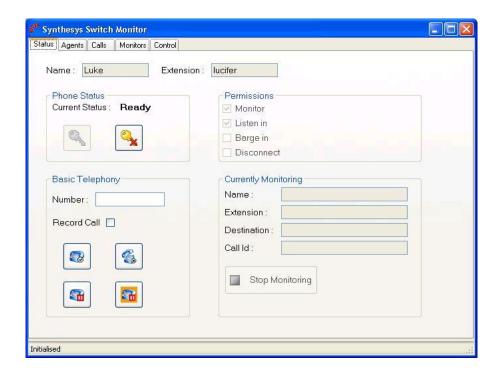
You can view the current state of all live campaigns that are running and observe individual agent activity within your call centre in real-time. Detailed data statistics are displayed for the individual teams, campaigns and outbound lists, agents and the dialler, with information about Queue distribution, Agent State, Handled Call Results and Dialler Results being visually represented in graphs.

The data shown includes for example the average agent talk time and you can see how long an agent takes on a particular section of a callflow. This allows you to identify problem areas or congestion points within a callflow and using the Campaign Editor, you can refine your callflow for improved performance.

The performance monitor works on the .net framework, and additional software may need to be installed before the monitor will work correctly.



SYNTHESYS SWITCH



The **Synthesys Switch Monitor** enables supervisors to view and monitor calls made using the Synthesys switch.

Supervisors can select the type of call that they wish to monitor, i.e. all predictive calls, or all calls with a specific extension. The supervisor will then hear a selection of calls, from the moment the call is placed, through to the delivery of the call to an agent and its completion or until the supervisor chooses to stop monitoring the call.

Using the *Inbound Manager* module, users can access the **Synthesys Switch Strategy Manager**.

Under *Strategy Assignment*, users are able to associate each incoming DDI with an inbound strategy. The *Strategy Editor* is used to specify a minimum ring time before calls are answered, decide whether or not to play a regulatory message and/ or music while callers are waiting and if the call should be recorded. Under the *Routing* option, users assign teams and specify how to deal a call not answered within a given time and under the *Active Time* and *Wrap Time* options user configure opening times and wrap up time.

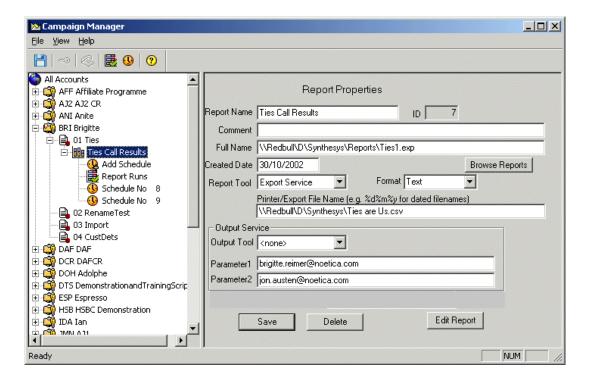


All system messages are held in WAV files and can be customised per inbound campaign. All call details (successful or abandoned) are logged to a database for reporting on call centre performance.

The Synthesys Switch is not a standard feature but needs to be purchased separately.



THE CAMPAIGN MANAGER



The Campaign Manager displays a Tree-View of all the accounts and campaigns created in the Campaign Editor.

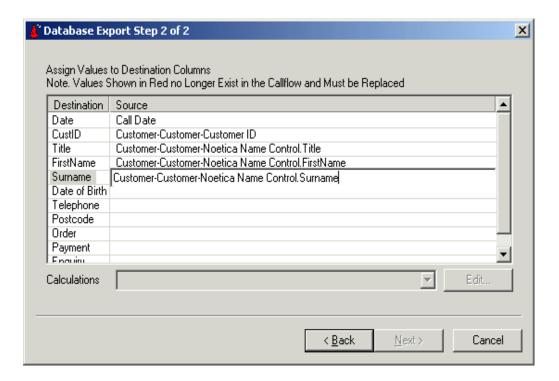
The Campaign Manager is used to add reports and schedules for Crystal or Impromptu reports and to set up Data Export, CRM Import and SQI (Selective Queuing Import) reports, each time using the designated Report Tool.

Having created and saved the reports, you can then set up report schedules to be run in a number of different ways, or frequencies and to be sent out to customers by fax, modem or email.

The *Campaign Manager* is also used to rename and delete your accounts and campaigns and to reset Synthesys sessions.



SYNTHESYS EXPORT WIZARD



The **Synthesys Export Wizard** allows data from a Synthesys call to be formatted as necessary and exported to an external data source, for example, a database table or as a comma separated file.

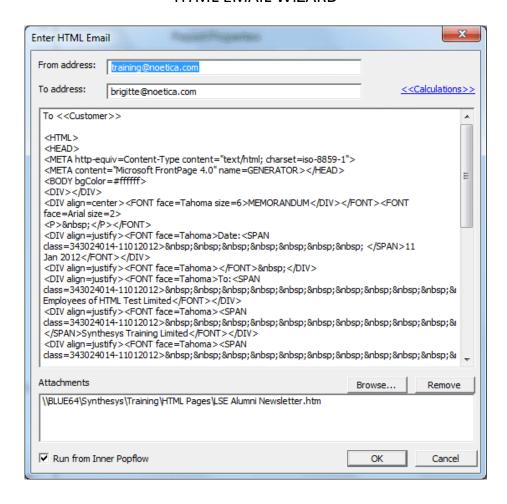
The Synthesys Export Wizard can also be used to update a CRM record with data collected during a call.

The Export Wizard is used to generate a file controlling the export. This file is then used to reproduce the export as many times as required in much the same way reports are generated.

Exports are scheduled as *Instant* reports in the Campaign Manager.



HTML EMAIL WIZARD



The **Create New HTML Email** option in the Synthesys Campaign Manager enables users to copy and paste or type HTML straight into an edit box and to send details in the body of an instant email.

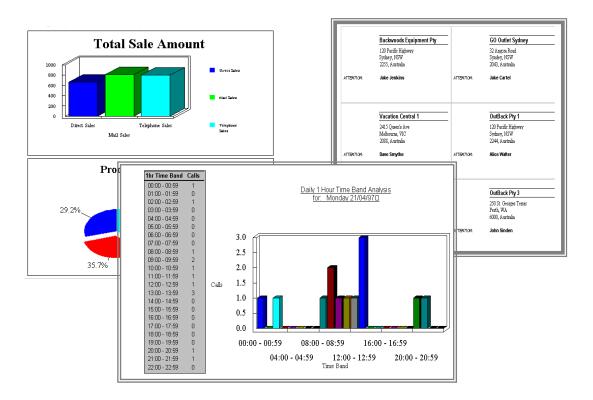
Users enter the email address of the sender and the recipient, or alternatively use a calculation to pick up the email address of the recipient from the Synthesys callflow.

On returning to the Synthesys Campaign Manager the email details, together with the associated *Report Tool* and *Format* fields will have been populated automatically and users simply need to add an instant schedule.

HTML emails will run instantly, as soon as a call is completed in Synthesys when taking calls.



TYPES OF REPORTS



Reports can be based on any information stored within the Synthesys system.

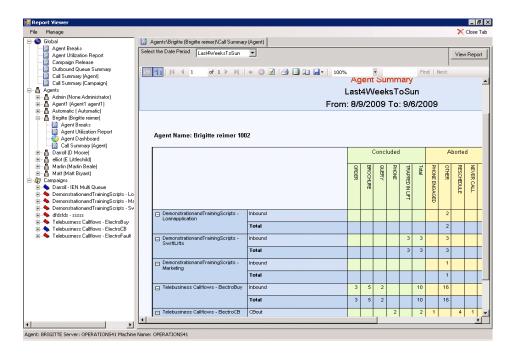
Synthesys logs all activities in the database, including every call handled, the time of the call and its duration.

Reports can be produced to run instantly or at regular intervals during the day and can provide daily, weekly or monthly information on any aspect of a campaign.

Reports can also provide the Call Centre Management with historical information on agents performance or call centre activities.



REPORT VIEWER



The **Report Viewer** is available to team leaders and managers, allowing them to add and view instant and historical reports on agent activity, call types and call outcomes, as well as on the quality of data capture at agent, outbound list, campaign or global level.

A range of standard SQL reports are available in the *Report Viewer* as part of the Synthesys installation. Included are for example the *Agent Utilization, Outbound Queue Summary* and *Dashboard* reports.

Further SQL reports can then be designed by the client's reporting team and added to the *Report Viewer* under the relevant *Global, Agents or Campaigns* categories.



TAKE CALLS BENEFIT

Consistent Interface

Agent guided through the Callflow

Consistent Data Input

Control of Callflow Navigation

Access to Help Pages/Intranet

Customer Focus

Consistent Interface. The layout of the callflows is always presented in the same format. This means that agents can handle a wide variety of campaigns, reducing agent training time and increasing productivity.

Agents are guided through the Callflow. Only information relevant at a particular point in the call is displayed, allowing agents to concentrate on one question at a time and enabling them to handle complex calls without being overwhelmed with data.

Consistent data input. Synthesys ensures that the agent collects **all** relevant information required by the client in a form that is readily usable to create reports and customer letters.

Control of Califlow navigation. It is easy to navigate backwards and forwards through the califlow and to make alterations if required.

Access to help pages, Intranets and the Internet means that agents can respond quickly and accurately to customer enquiries regarding a company and its products that may be outside the scope of the callflow.

Customer Focus. Synthesys enables the agent to focus on the customer with the confidence that they will be asking all the right questions, capturing all the right data and ensuring they have a satisfied customer at the end of the call.



CALLFLOW EDITOR: BENEFITS

Intuitive and Visual Callflow Design

Complex Callflows quickly Designed

Active X Component Software

Automatic Database Build & Callflow Deployment

Easy to Design & Link Help Pages

Intuitive and Visual Callflow Design. Callflows can be designed by easy click and drag process.

Complex Callflows quickly designed. Even complex callflows can be easily designed and modified by non-technical staff. The benefits are:

Account managers can involve customers in the design process

Dramatically reduces implementation time

Efficiency of a Callflow can be quickly tested, monitored and improved

No programming knowledge required

ActiveX Component Software. Synthesys uses ActiveX components to build callflows. They are adaptable and you can decide the way information and sections are presented to the agent. Active X controls also control related background tasks such as building database tables and retrieving data. Since ActiveX conforms to open standards, you are not tied in to a proprietary system- components are available from 3rd party suppliers, as well as Noetica.

Automatic database build and Callflow deployment. Synthesys creates the underlying database tables for you and automatic callflow deployment ensures that agents always have the most upto-date callflows.

Easy to Design & Link Help Pages. It is easy to create and attach help pages at any point within in the callflow and to provide a connection to your Intranet or the Internet.



SYNTHESYS TRAINING MODULES

Basic Callflow Design

Customer Relationship Management (CRM) & Data Import

Outbound Call List Management

Advanced Call Recycling

Call Tracker & Escalation Procedures

Agent Perspective

Managing and Monitor Functions

Managing Reports and Campaigns

Standard Active X Controls

System Maintenance

Technical Support

Please note: Some of the modules mentioned will not be included as part of the standard installation price. They will however be available for an additional payment- please check with the installation team.



PRODUCT SUPPORT

Contact Number:
+44 0844 556 4700
Hours available:
9:00-5:00 Monday to Friday