

Bulk Queue Change

The screenshot shows the Noetica SYNTHESYS™ CAMPAIGN MANAGER interface. The top navigation bar includes the Noetica logo, the product name, and a user profile for 'brigitte'. A left sidebar shows a workspace tree with 'CustomersSP2' selected. The main content area is titled 'Bulk Queue Change' and features a table of jobs. The table has columns for 'Job Name', 'Run', 'Edit', 'Schedule', and 'Delete'. Two jobs are listed: 'Special Orders' and 'New Orders'. A 'Schedule Bulk Queue Change' tooltip is visible over the 'Schedule' button for 'New Orders'. A 'Refresh' button is also present in the top right of the job list area.

Schedule Bulk Queue Change Step 1/1

Recurrence Pattern

Regularly within each day Every days

Daily

Weekly

Monthly

Range of Recurrence

No End Date

End Date:

Start Date:

End Date:

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The information contained in this document may change. We may issue revisions from time to time to advice of changes or additions. We operate a policy of constantly improving and enhancing our application software. There is a possibility therefore that the format of the screen display and printed output shown in this documentation may differ slightly from that provided in the software. It is our policy to update this documentation whenever a major release of software takes place.

Synthesys™ Bulk Queue Change

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BULK QUEUE CHANGE

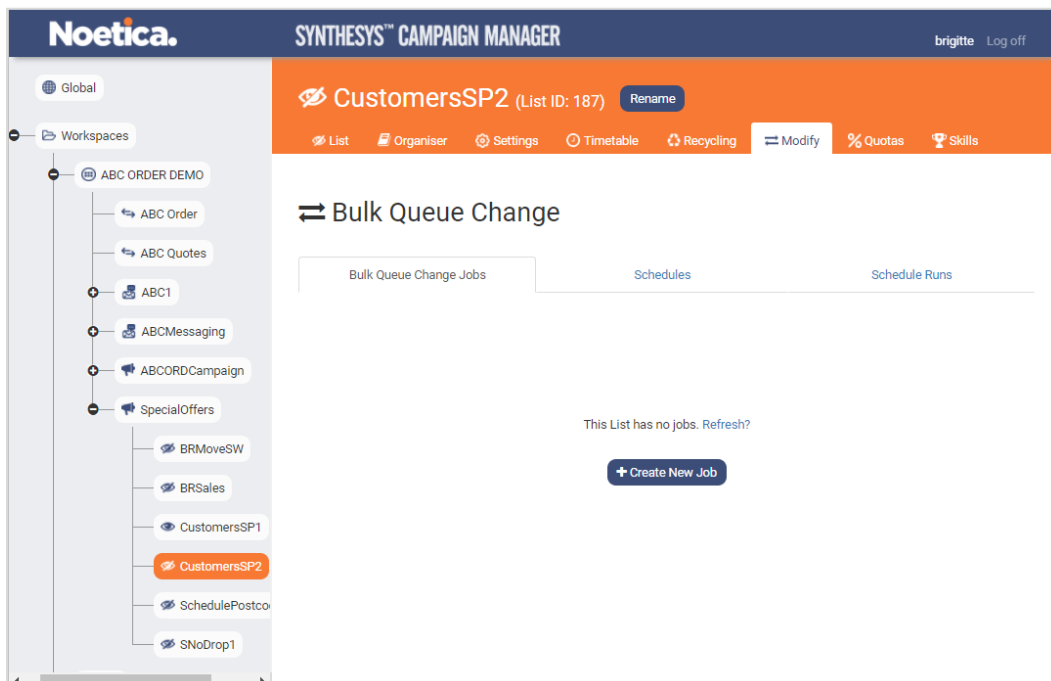
The Bulk Queue Change option, available at call list level, allows users to manipulate queued items at list level, and to apply filters to manipulate queue entries based on Entity data. The changes can be applied instantly, or you can set up schedules to run the bulk queue changes at specified intervals.



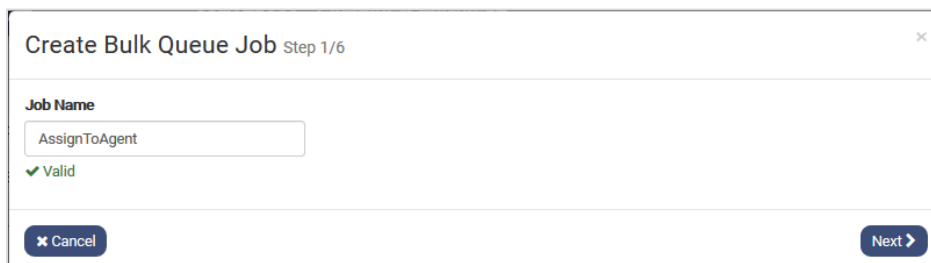
The filters to define data segments within an Entity/ CRM are created in the Filter Designer, accessed via the **Filters** tab at workspace level.

Creating a Bulk Queue Change Job

- Select the call list that you wish to use for your bulk queue change.
- Click the **Modify** (Bulk Queue Change) tab in the list dialog.



- Next, click the **+Create New Job** button in the Bulk Queue Change dialog.
- Enter a name for the bulk queue change job into the **Job name** dialog.

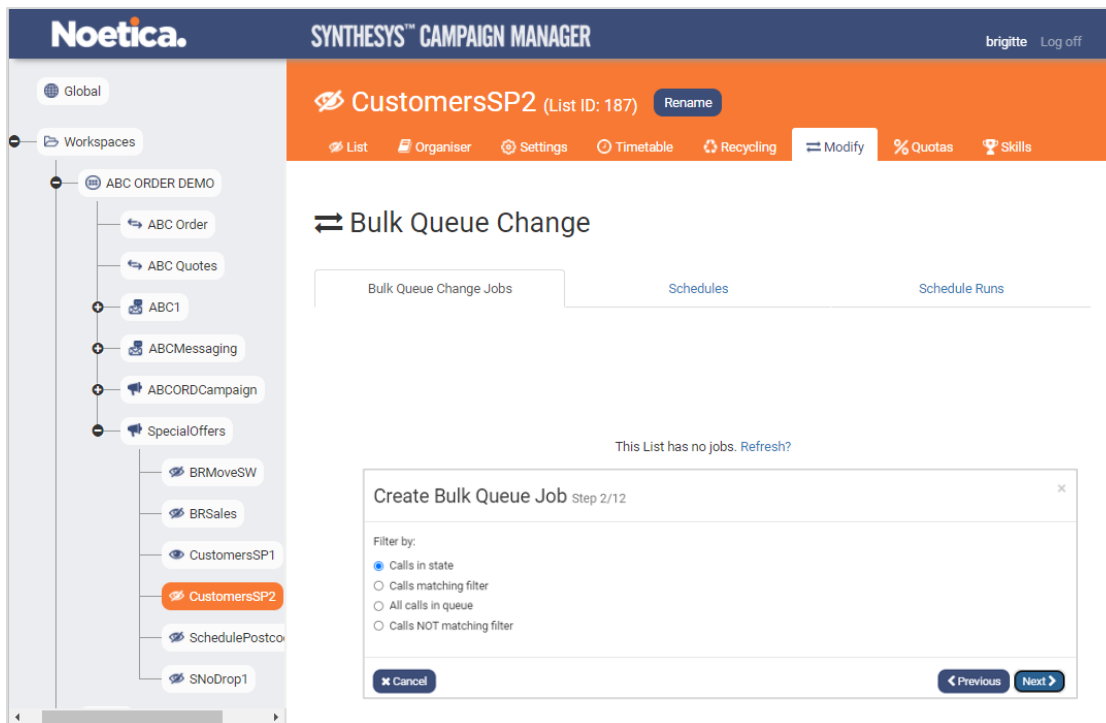


- Click **Next**, to move to the next step of defining your bulk queue changes.

BULK QUEUE CHANGE OPTIONS

The options available for your bulk queue change include:

- Calls in state.
- Calls matching filter.
- All calls in queue.
- Calls Not matching filter.



The screenshot shows the Noetica SYNTHESYS™ CAMPAIGN MANAGER interface. The user is logged in as 'brigitte'. The main view is for the 'CustomersSP2' list (List ID: 187). The 'Bulk Queue Change' section is active, showing a message: 'This List has no jobs. Refresh?'. Below this is a 'Create Bulk Queue Job' dialog box (Step 2/12) with the following filter options:

- Calls in state
- Calls matching filter
- All calls in queue
- Calls NOT matching filter

Buttons for 'Cancel', '< Previous', and 'Next >' are visible at the bottom of the dialog.

Depending on your selection, you can manipulate the queue entries for a selected call list, or you can apply existing filters based on Entity properties to manipulate queue items.

Options	Description
Calls in state	Allows users to select call states and manipulate queue entries for the selected list, e.g., changing sleeping calls to queued, or assigning an agent to scheduled calls.
Calls matching filter	Allows users to apply existing filters to manipulate queue entries based on Entity properties.
All calls in queue'	Allows users to manipulate all queue entries in a selected list.
Calls matching filter	Allows users to manipulate queue entries not matching a selected filter.

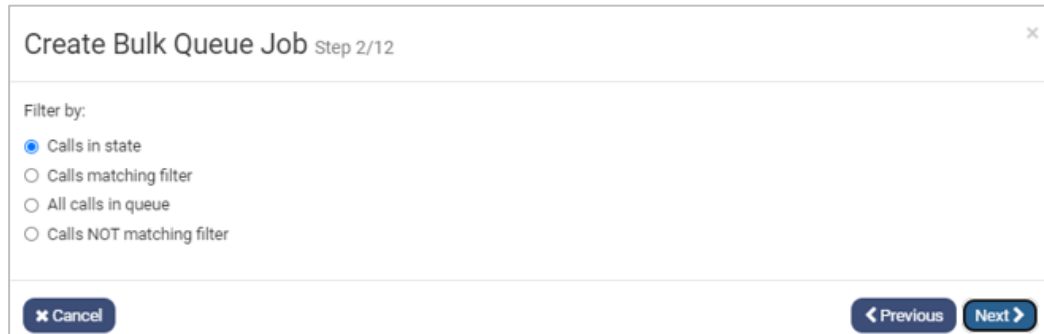


When moving through the pages, use the **Next>** button to navigate to the next page, *the* **<Previous** button to move back to the previous page and **Cancel**, to abandon an action without saving the changes.

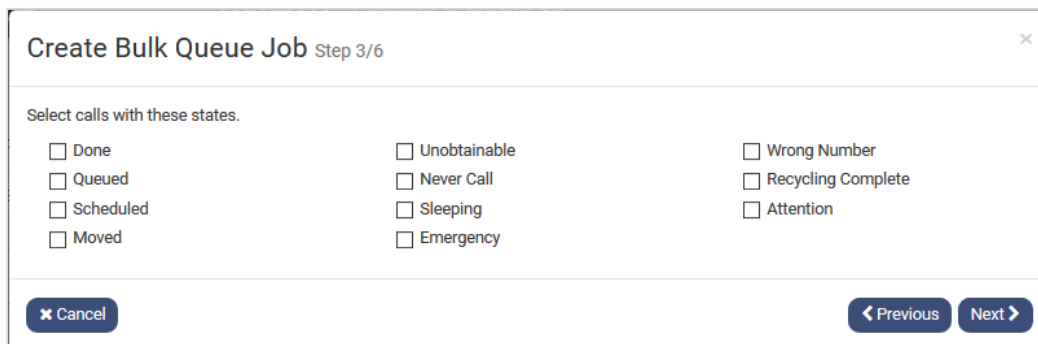
Calls in State.

If you wish to manipulate queued items for a selected call list

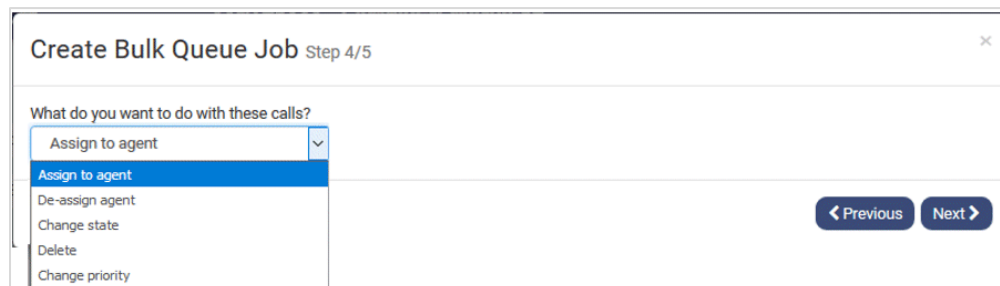
- Select the **Call in state** option.



- In the next page, select the call state(s) that you wish to manipulate.



- Next, select the change that is to take effect.



- The options include *Assign to agent* (only sleeping & rescheduled outcomes), *Change State*, *De-assign agent*, *Delete* or *Change priority*.

Depending on your selection, the following pages of the bulk queue change job will provide the options that you can use for your Calls in State queue manipulation.

Please see the next pages for more information.

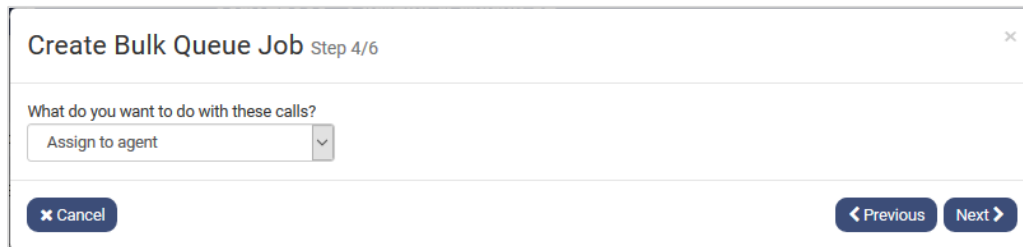
Assign to Agent

If you wish to use the bulk queue change to assign rescheduled and/ or sleeping calls to a particular agent

- Select **Assign to agent** in step four of your bulk queue change.

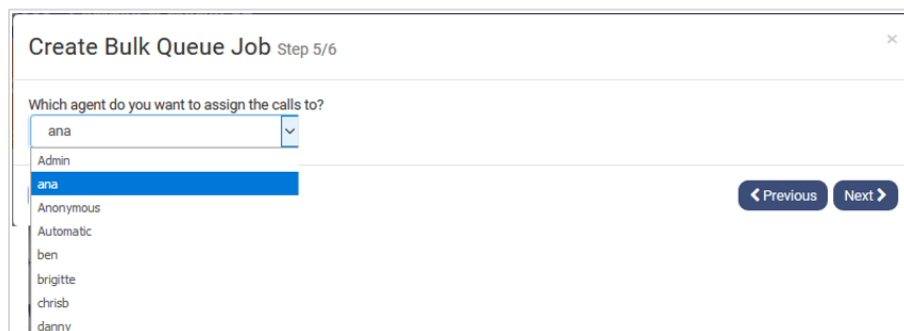


Any outcomes other than rescheduled or sleeping that may have been selected will be ignored as they can't be assigned.



The screenshot shows a dialog box titled "Create Bulk Queue Job Step 4/6". It contains a question "What do you want to do with these calls?" with a dropdown menu set to "Assign to agent". At the bottom, there are three buttons: "Cancel", "Previous", and "Next".


- In the next page, select the agent that you wish to assign to the currently rescheduled or sleeping calls.



The screenshot shows a dialog box titled "Create Bulk Queue Job Step 5/6". It contains a question "Which agent do you want to assign the calls to?" with a dropdown menu. The dropdown is open, showing a list of agents: "ana", "Admin", "Anonymous", "Automatic", "ben", "brigitte", "chrisb", and "danny". The "ana" option is highlighted. At the bottom right, there are "Previous" and "Next" buttons.

In the last page of your bulk queue change job, select

- **Save job and run now**, to apply the changes immediately.
- **Save job so it can be scheduled later**, to set up a schedule for the bulk queue change later, to run at specified intervals.



The screenshot shows a dialog box titled "Create Bulk Queue Job Step 7/7". It contains a warning message: "Run now or schedule later. The change you requested would affect a large number of records (18112) and might have a detrimental impact on system performance. You may wish to consider scheduling this to run out of contact centre normal operating hours." Below the message are two radio buttons: "Save job and run now" (which is selected) and "Save job so it can be scheduled later". At the bottom, there are three buttons: "Cancel", "Previous", and "Finish".

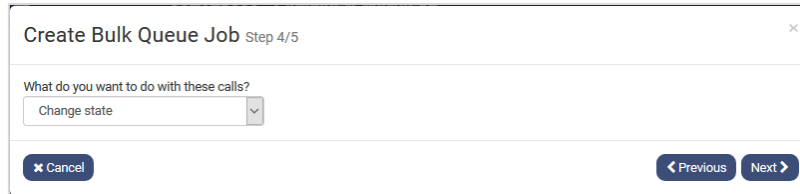


If you create a Bulk Queue Change job that will affect more than 1000 records, a message will inform you that this might impact on system performance and that it may be preferable to save the job and schedule it to run out of contact centre normal operating hours.

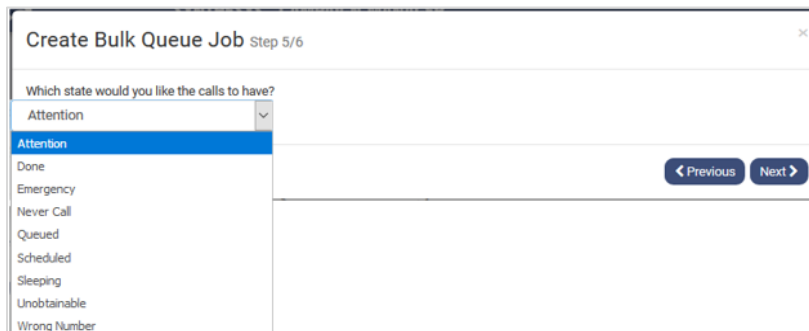
Change State

To change the current queue state of selected queue items in the list to another state

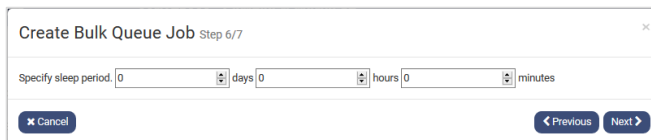
- Select the **Change State** option in step four of your bulk queue change.



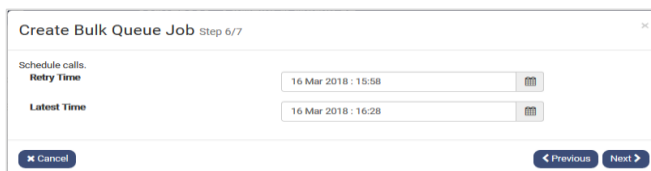
- In the next page, select the state that you wish to apply.
- You can change the call state to *Attention; Done; Emergency (Priority); Never Call; Queued; Scheduled; Sleeping; Unobtainable* or *Wrong Number*, as required.



If you select *Sleeping*, you will be prompted to specify the sleeping period.



If you select *Scheduled*, you will be prompted to specify the retry time and latest due time.



In the final page of your bulk queue change, you can apply the changes immediately, or you can save your bulk queue change job and create a schedule for later.

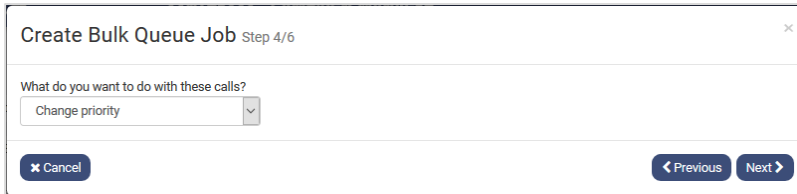



If you create a Bulk Queue Change job that will affect more than 1000 records, a message will inform you that this might impact on system performance and that it may be preferable to save the job and schedule it to run at a more convenient time.

Change Priority

To change the call priority of selected records or call outcomes

- Select **Change Priority**

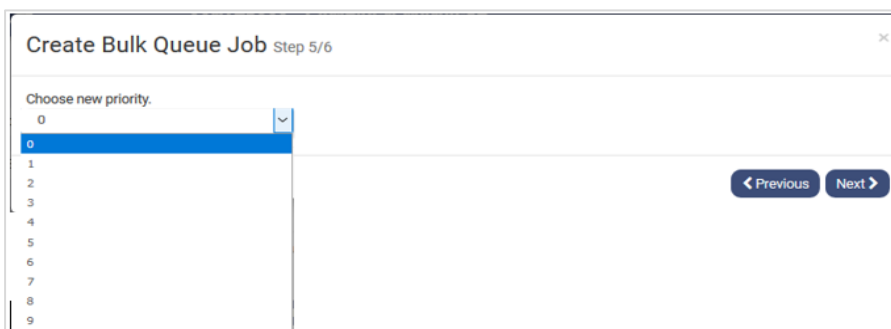


Create Bulk Queue Job Step 4/6

What do you want to do with these calls?
Change priority

Cancel Previous Next

- Next, choose the call priority that you wish to assign from a range between 0 – 9 (Idle = 0, Low = 1, High = 9).



Create Bulk Queue Job Step 5/6

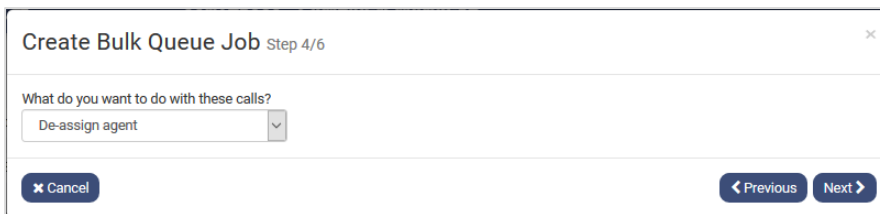
Choose new priority.
0

0
1
2
3
4
5
6
7
8
9

Previous Next

De-assign

Select the **De-assign** option if you want to remove the current agent assignment.



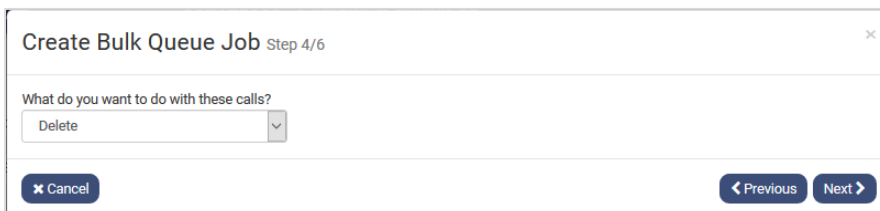
Create Bulk Queue Job Step 4/6

What do you want to do with these calls?
De-assign agent

Cancel Previous Next

Delete Options

Select the **Delete** option, to remove selected queued items from the call list.



Create Bulk Queue Job Step 4/6

What do you want to do with these calls?
Delete

Cancel Previous Next



In the final page of your Bulk Queue Job, you can apply the changes immediately, or if a large number of records are affected, which might impact on system performance, you may prefer to save your bulk queue change job and create a schedule to run out of contact centre normal operating hours.

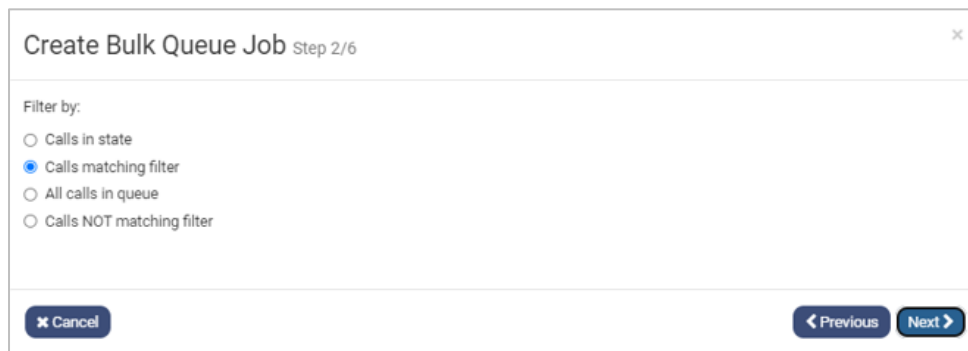
Calls matching Filter.

The **Calls matching filter** (or **Calls Not matching Filter**) option, allows you to apply an existing filter based on entity data, to determine which records you wish to include for your bulk queue change.



If you have not yet created the filter to specify the relevant data segments that you wish to use, please go to the **Filters** tab at **Workspace** level, and define the filter for your bulk queue change in the Filter Designer.

- In step two of the bulk queue change, select the **Calls matching filter** option.



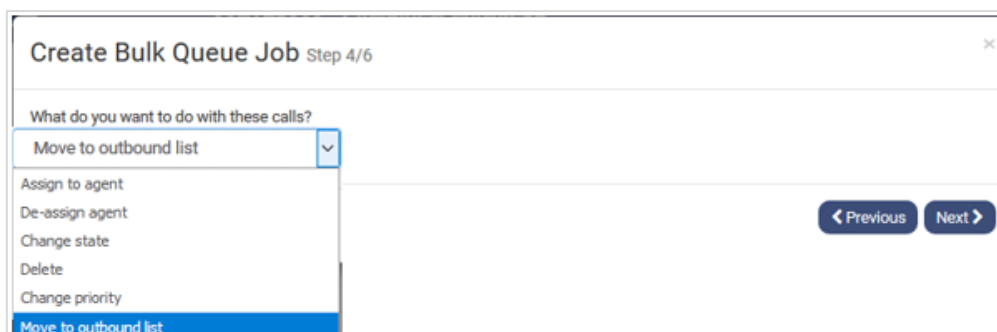
The screenshot shows a dialog box titled "Create Bulk Queue Job Step 2/6". Under the heading "Filter by:", there are four radio button options: "Calls in state", "Calls matching filter" (which is selected), "All calls in queue", and "Calls NOT matching filter". At the bottom, there are three buttons: "Cancel", "Previous", and "Next".

- Next, choose the filter that you wish to apply.



The screenshot shows a dialog box titled "Create Bulk Queue Job Step 3/6". It asks to "Select a Filter to restrict the data which will be handled:". A dropdown menu is open, showing options: "No Filter", "London SW", and "Order Date". The "Order Date" option is currently selected. There are "Cancel", "Previous", and "Next" buttons at the bottom.

- In the next page, select the change that is to take effect.
- The options include *Assign to agent* (sleeping & rescheduled outcomes), *De-assign agent*, *Change State*, *Delete*, *Change priority* and *Move to Outbound list*.



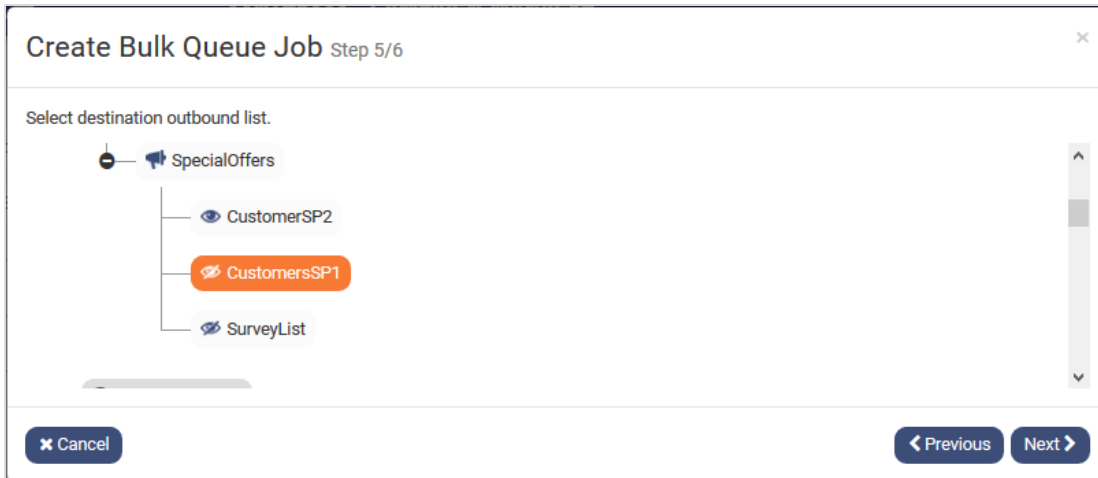
The screenshot shows a dialog box titled "Create Bulk Queue Job Step 4/6". It asks "What do you want to do with these calls?". A dropdown menu is open, showing several options: "Move to outbound list" (selected), "Assign to agent", "De-assign agent", "Change state", "Delete", "Change priority", and "Move to outbound list" (repeated at the bottom). There are "Previous" and "Next" buttons at the bottom right.

In our example, we want to move selected records from the current call list to another outbound list.



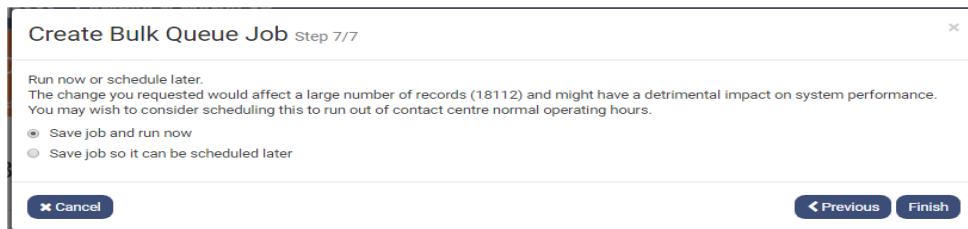
All moved calls, regardless of their current queue state, will be queued and displayed in the target call list as freshly queued calls, with the number of times called set back to zero.

The next page of the bulk queue change will prompt you to select the destination outbound list.



In the final page of the bulk queue change job select

- **Save job and run now**, to apply the changes immediately.
- **Save job so it can be scheduled later**, to set up a schedule for the bulk queue change later, to run at specified intervals.



If you create a Bulk Queue Change job that will affect more than 1000 records, a message will inform you that this might impact on system performance and that it may be preferable to save the job and schedule it to run out of contact centre normal operating hours.

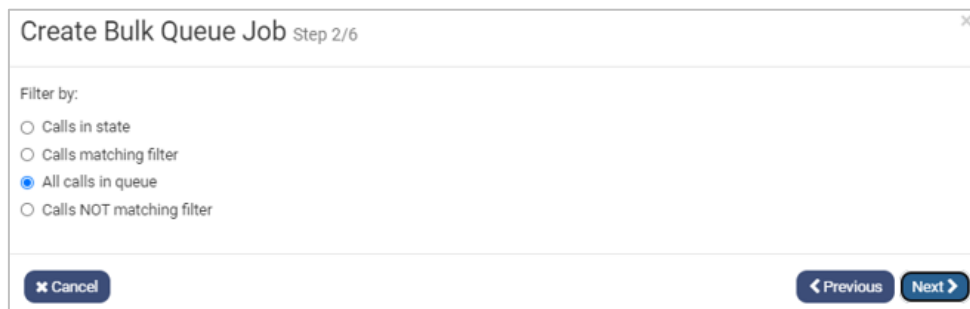
All Calls in Queue.

The option **All calls in queue** is used to manipulate the state of all queued items in a selected call list.



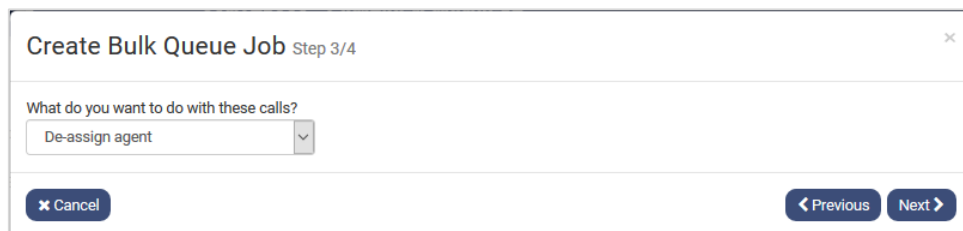
Please be aware that the **All calls in queue** option will affect the entire call queue, i.e., all queued records in the selected call lists.

- If you are sure that you wish to manipulate all queued records, select **All calls in queue** in step two of the bulk queue change job.



The screenshot shows a dialog box titled "Create Bulk Queue Job Step 2/6". It contains a "Filter by:" section with four radio button options: "Calls in state", "Calls matching filter", "All calls in queue" (which is selected), and "Calls NOT matching filter". At the bottom, there are three buttons: "Cancel", "Previous", and "Next".

- In the next page, specify the change that should apply to the entire call queue.
- You can choose to *De-assign agent*, *Change State*, *Delete*, or *Change Priority*.



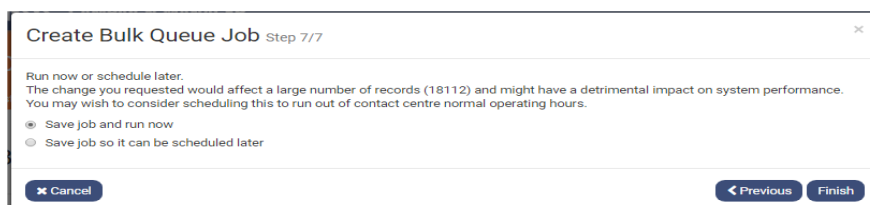
The screenshot shows a dialog box titled "Create Bulk Queue Job Step 3/4". It contains a section titled "What do you want to do with these calls?" with a dropdown menu currently set to "De-assign agent". At the bottom, there are three buttons: "Cancel", "Previous", and "Next".

If you select **Change state** or **change Priority**, the next page will prompt you to specify the new state or priority that is to take effect, before moving to the final page.

If you select **De-assign agent** or **Delete**, Next> will move you directly to the final page of the bulk queue change job.

Decide if you want to

- **Save job and run now**, to apply the changes immediately.
- **Save job so it can be scheduled later**, to set up a schedule for the queue change.



The screenshot shows a dialog box titled "Create Bulk Queue Job Step 7/7". It contains a warning message: "Run now or schedule later. The change you requested would affect a large number of records (18112) and might have a detrimental impact on system performance. You may wish to consider scheduling this to run out of contact centre normal operating hours." Below the message are two radio button options: "Save job and run now" (which is selected) and "Save job so it can be scheduled later". At the bottom, there are three buttons: "Cancel", "Previous", and "Finish".

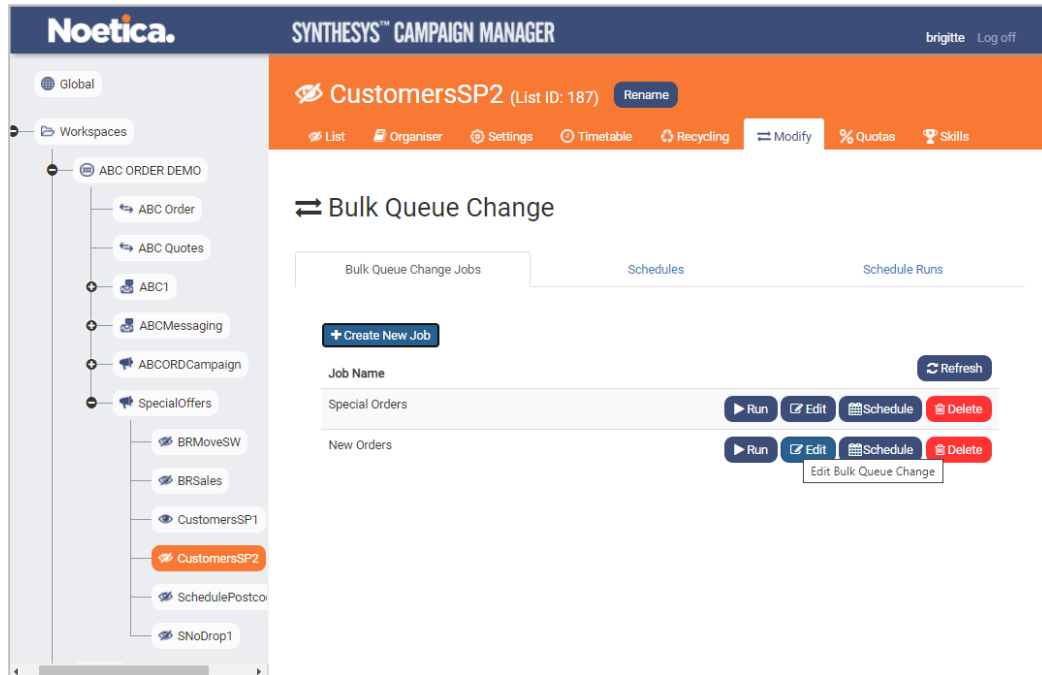


If you create a Bulk Queue Change job that will affect more than 1000 records, a message will inform you that this might impact on system performance and that it may be preferable to save the job and schedule it to run out of contact centre normal operating hours.

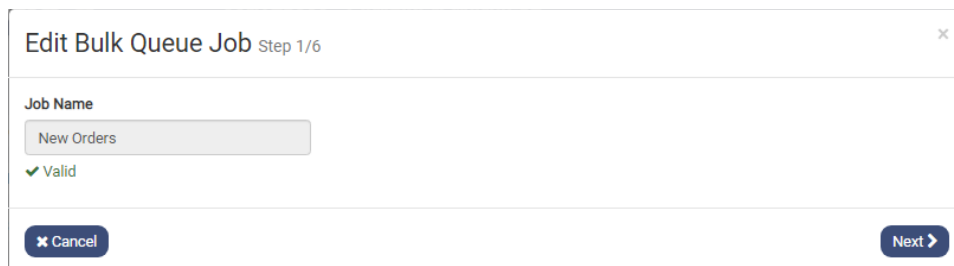
EDITING BULK QUEUE CHANGE JOBS

If you wish to check or edit an existing bulk queue change job

- Locate the campaign and call list that contains the bulk queue change job that you wish to view or amend.
- Select the **Modify** (Bulk Queue Change) tab at the top right of the list dialog.



- Click the **Edit button** for the existing queue change job.
- Move through the pages of the **Edit Bulk Queue Job** wizard, where you can view or change any existing filters, call states or outcomes, as required.



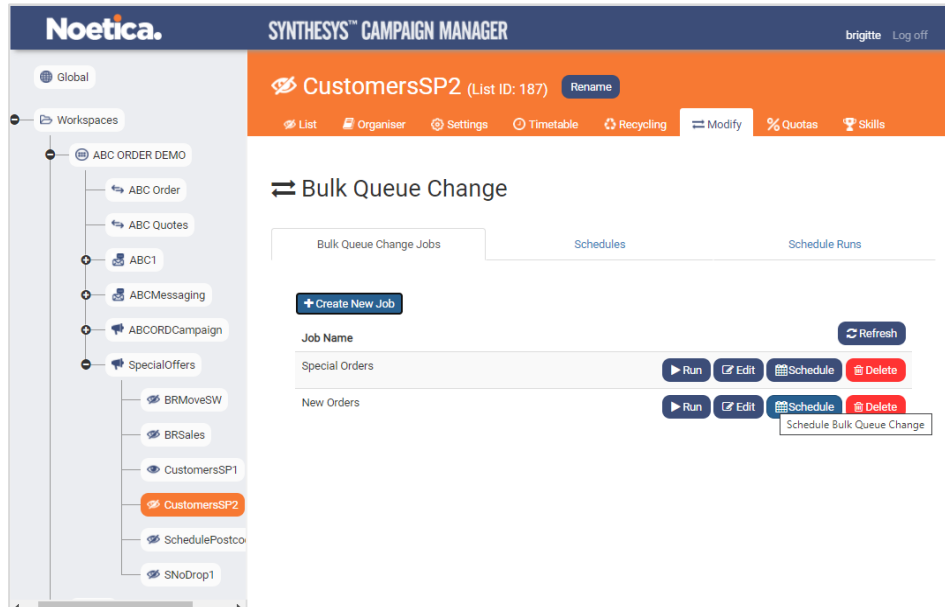
The screenshot shows the 'Edit Bulk Queue Job' wizard dialog, Step 1/6. The 'Job Name' field contains 'New Orders' and is marked as 'Valid'. There are 'Cancel' and 'Next' buttons at the bottom.

Please see the next page for information about scheduling a Bulk Queue Change.

SCHEDULING BULK QUEUE CHANGES

Bulk queue change jobs are scheduled at list level.

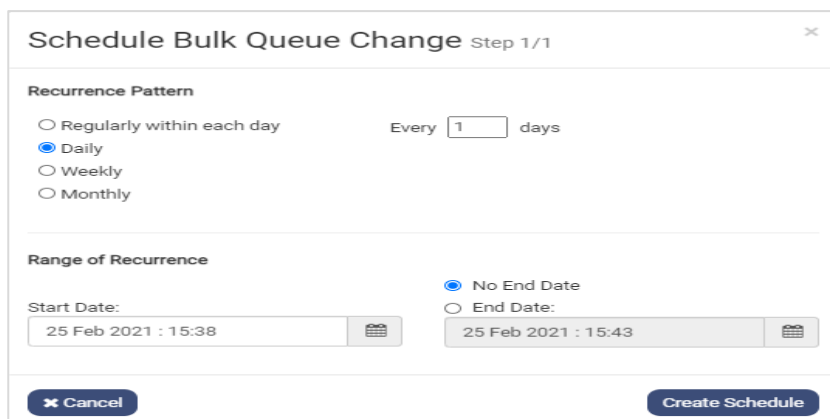
- Move your mouse pointer over the bulk queue change job that you wish to run and click the **Schedule** button.



The screenshot shows the Noetica SYNTHESYS™ CAMPAIGN MANAGER interface. The user is logged in as 'brigitte'. The main view is for 'CustomersSP2 (List ID: 187)'. The left sidebar shows a tree view of workspaces, with 'CustomersSP2' selected. The main content area is titled 'Bulk Queue Change' and has three tabs: 'Bulk Queue Change Jobs', 'Schedules', and 'Schedule Runs'. Under 'Bulk Queue Change Jobs', there are two job entries: 'Special Orders' and 'New Orders'. Each job has 'Run', 'Edit', 'Schedule', and 'Delete' buttons. A 'Create New Job' button is also visible. A 'Refresh' button is located at the top right of the job list.

You can now decide the frequency for your bulk queue change.

- In the **Recurrence Pattern** section, select either Regularly within each day, Daily, Weekly or Monthly and then specify further details, as required.
- In the **Range of Recurrence** section, select a **start date** for the schedule.
- You can then specify an *End Date* or continue to run your schedule indefinitely by selecting the *No End Date* option.



The screenshot shows the 'Schedule Bulk Queue Change' dialog box, Step 1/1. The dialog has a close button (X) in the top right corner. It is divided into two main sections: 'Recurrence Pattern' and 'Range of Recurrence'.
Recurrence Pattern: There are four radio button options: 'Regularly within each day' (with an input field for 'Every 1 days'), 'Daily' (which is selected), 'Weekly', and 'Monthly'.
Range of Recurrence: There are two radio button options: 'No End Date' (which is selected) and 'End Date'. Below these are two date pickers: 'Start Date:' with the value '25 Feb 2021 : 15:38' and 'End Date:' with the value '25 Feb 2021 : 15:43'. At the bottom of the dialog are two buttons: 'Cancel' and 'Create Schedule'.

- To action the **bulk queue change**, click the **Create Schedule** button.

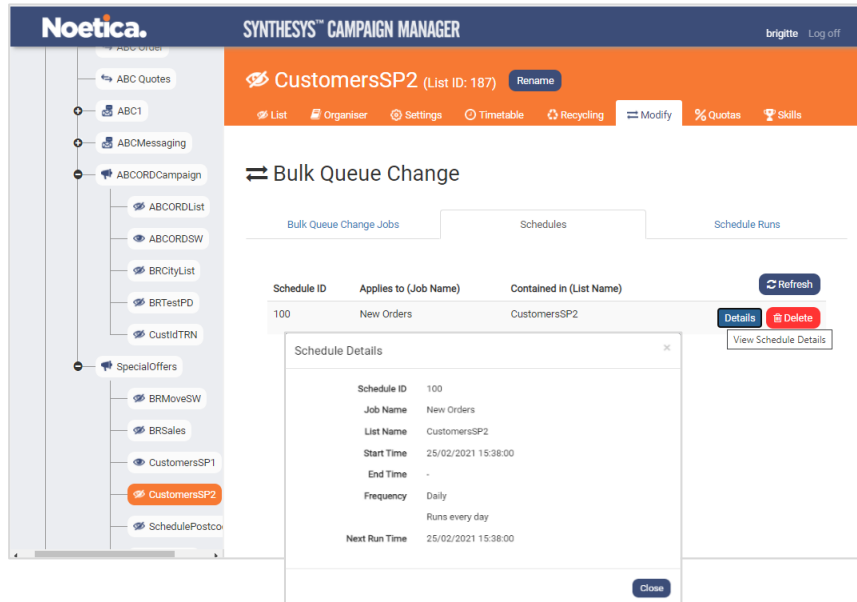


When you try to run or schedule a Bulk Queue Change job that will affect more than 1000 records, a message will inform you that this might impact on system performance and that it may be preferable to schedule the job to run out of contact centre normal operating hours.

Viewing Bulk Queue Change Schedules

In the **Bulk Queue Change** dialog, at list level

- Select the **Schedules** option and move your mouse pointer over the schedule that you wish to view, to show the *Details* and *Delete* buttons.



The screenshot shows the 'Bulk Queue Change' dialog for 'CustomersSP2 (List ID: 187)'. The 'Schedules' tab is selected, showing a table with the following data:

Schedule ID	Applies to (Job Name)	Contained in (List Name)
100	New Orders	CustomersSP2

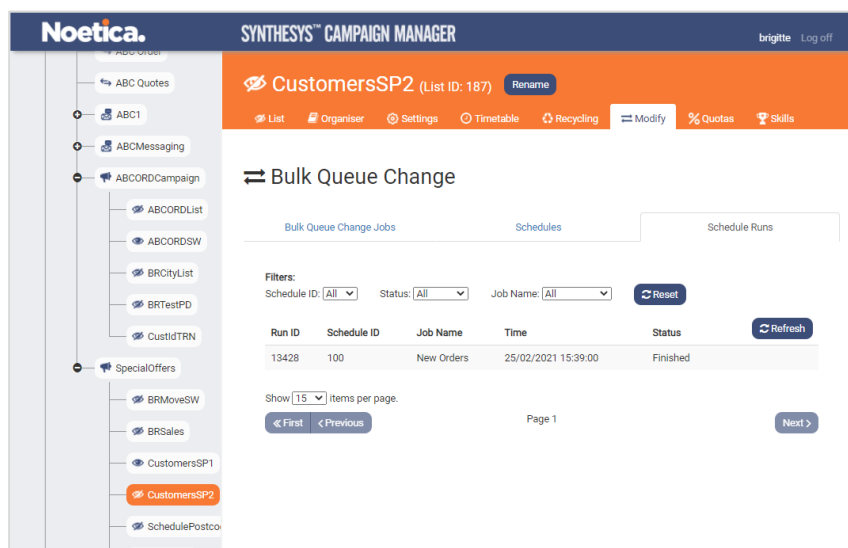
A 'Schedule Details' modal is open, displaying the following information:

- Schedule ID: 100
- Job Name: New Orders
- List Name: CustomersSP2
- Start Time: 25/02/2021 15:38:00
- End Time: -
- Frequency: Daily
- Runs every day
- Next Run Time: 25/02/2021 15:38:00

- Click the **Details** button to open the Schedule Details page, which displays a summary of the selected schedule.

Viewing Bulk Queue Change Schedule Runs

- Select the **Schedule Runs** option in the Bulk Queue Change dialog.



The screenshot shows the 'Bulk Queue Change' dialog for 'CustomersSP2 (List ID: 187)'. The 'Schedule Runs' tab is selected, displaying a table with the following data:

Run ID	Schedule ID	Job Name	Time	Status
13428	100	New Orders	25/02/2021 15:39:00	Finished

The interface also includes filter menus for Schedule ID (All), Status (All), and Job Name (All), along with a 'Refresh' button and pagination controls.

- Using the **Schedule ID**, **Status** and **Job Name** drop down menus, you can select and display specific schedule runs. Clicking the Refresh button will update the list.