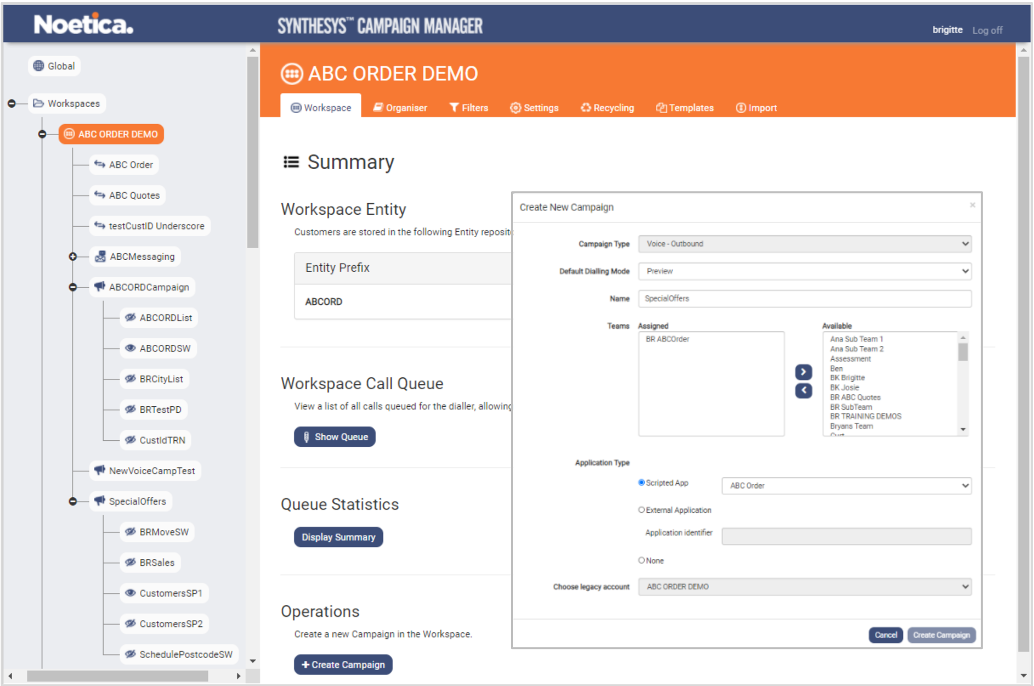
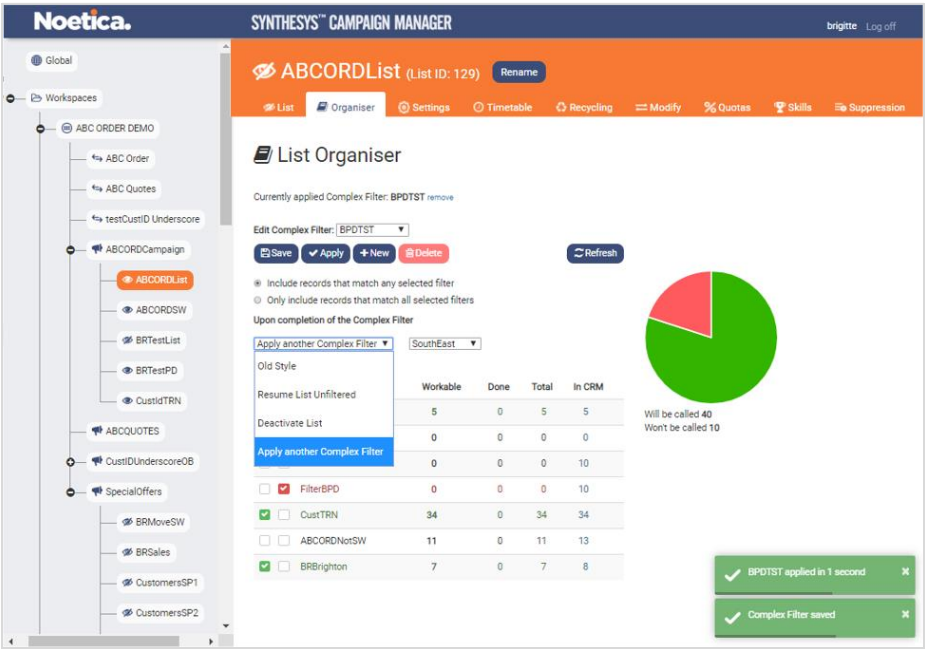
SYNTHESYS™ CAMPAIGN MANAGER

Workspace: Creating a new Campaign



Organiser



Synthesys™ Campaign Manager

Last updated August 2024

CONTENT

SYNTHESYS™ CAMPAIGN MANAGER

Introduction

The Synthesys™ Campaign Manager is a web-based interface that enables you to add and manage voice and messaging campaigns.

Both voice and messaging campaigns are created under the relevant workspaces.

For voice campaigns, you associate each campaign with the scripted app that supports the interaction between agents and customers, and add your outbound call lists, as required.

For messaging campaigns, you add your SMS and email lists and associate each list with the messaging template to be used for sending the SMS or email.

This document covers the functionality of the Campaign Manager and describes, in detail, how to set up voice campaigns and outbound call lists, and how the Queueing, Filter and List Organiser options are used to manage campaigns and outbound call lists.

To optimize your call list management, please also look at the documents Call Recycling and Bulk Queue Change, for information of how to apply changes quickly, and efficiently as and when needed.

For information about managing entities, setting up workspaces and building scripted apps, please use the documents “CRM Entities” and “Scripted App Design”.

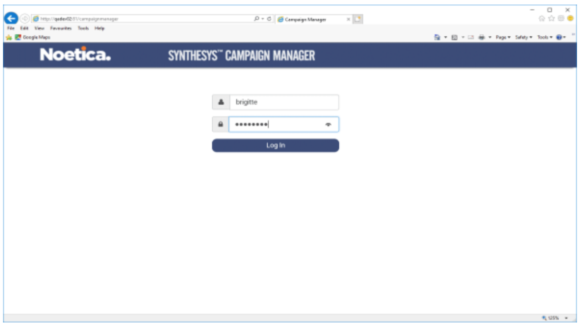
For details about creating messaging templates, messaging campaigns and SMS and email lists, please see the document “SMS and Email Outbound Lists**”.**

For setting up inbound email campaigns, to enable agents to handle incoming emails and respond to these in a systematic, campaign based fashion, please see the document “Inbound Email Campaigns, and contact your Noetica representative for technical notes and training.

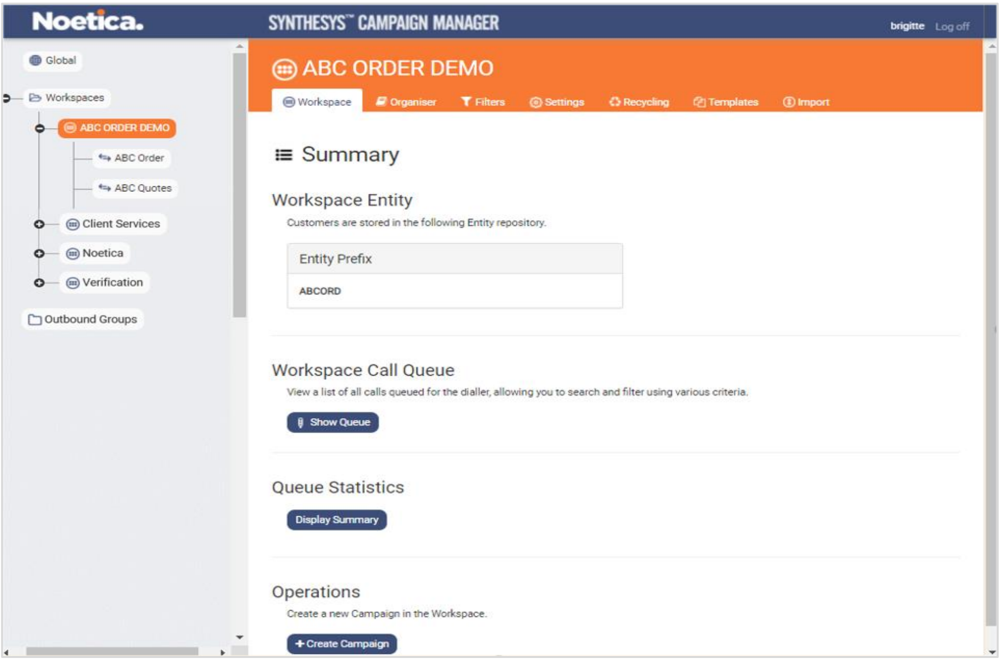
Opening the Campaign Manager

To access the Synthesys™ Campaign Manager, open your preferred Web Browser.

- Open the Campaign Manager via the Noetica Admin Portal, or
- Enter the URL of your application server into the address field of the Web Browser, e.g., http://WebserverName/campaignmanager.
- Next, enter your username and password, as provided by your system administrator.



The Campaign Manager will display the available workspaces, scripted apps, campaigns, outbound lists, and groups.

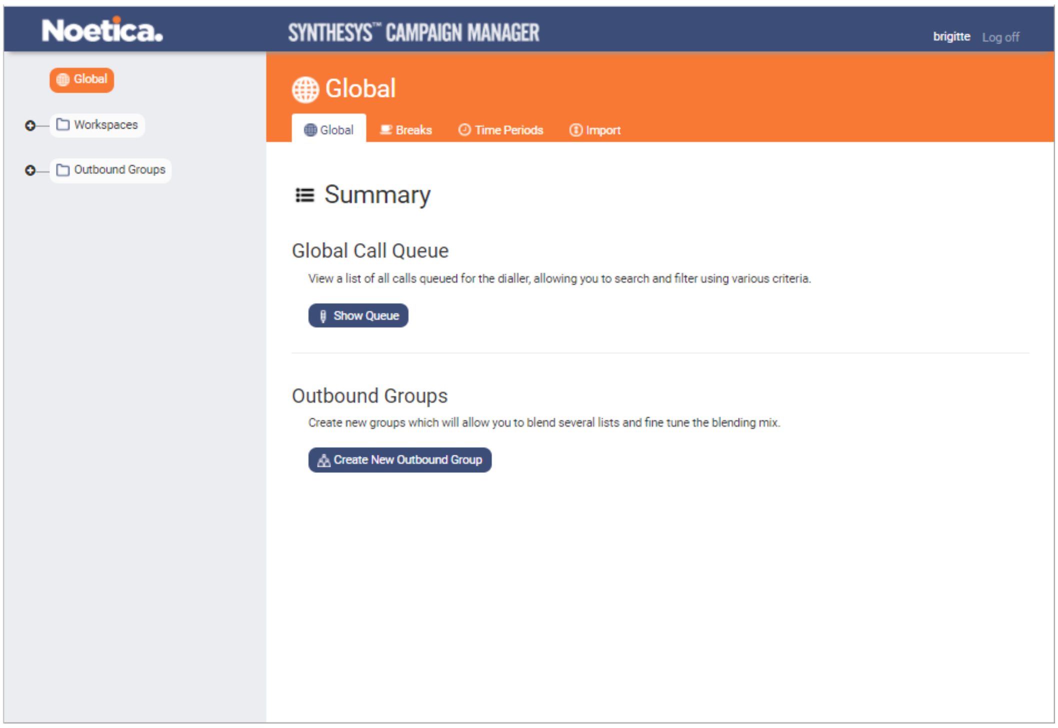


Option	Description
Workspaces	Represent customer accounts and the associated CRM/ Entity table. Each Workspace can be linked to one Primary Entity, which typically contains the essential customer data to be used when creating and managing call lists.
Scripted Apps	Are the call scripts that support the interactions between agents and customers (ABC Order Review; ABC Order Survey)
Campaigns	Shows the campaigns that are being run in the contact centre, e.g., Special Offers, Renewals, Applications or Sales. Campaigns link customer data, agents, teams, and telephony together into a coherent stream of work.
Lists & Groups	Are single and multiple call lists of customers that are to be contacted.

The Global Screen

Depending on the user permissions assigned, the tree structure on the left of the Global screen will display all, or some of the workspaces and scripted apps that have been created in the Synthesys™ Interaction Studio, and the associated campaigns, outbound lists and groups that are subsequently added in the Synthesys™ Campaign Manager.

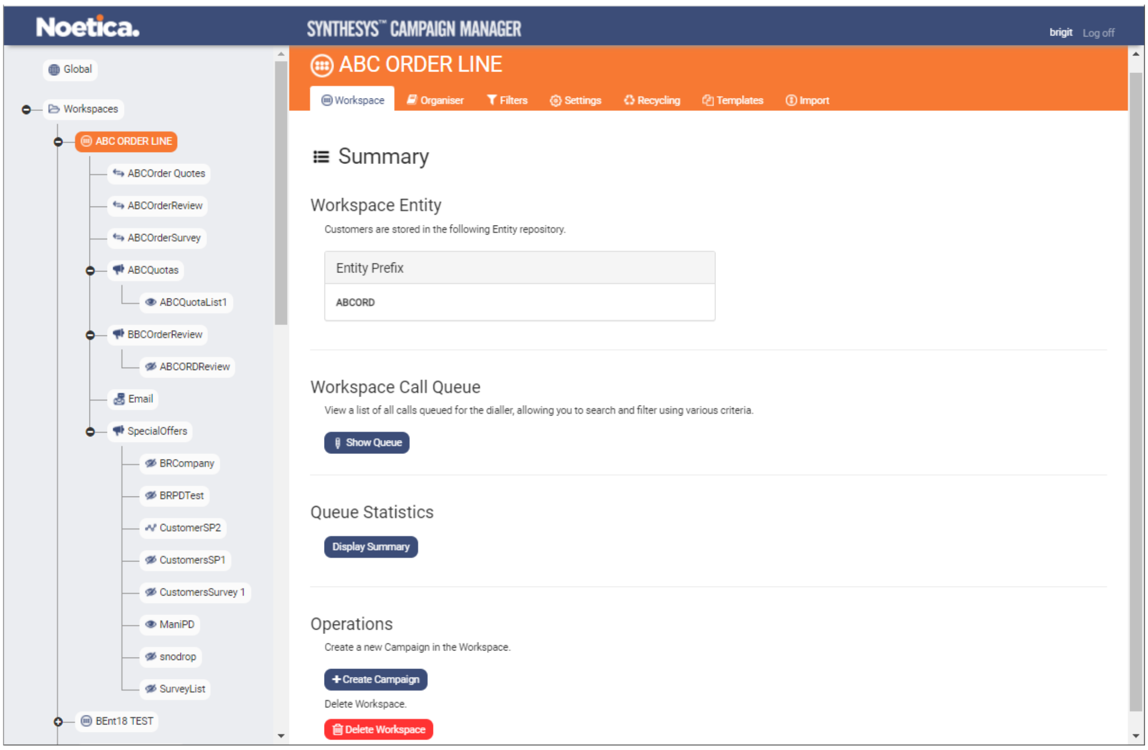
From the Global screen, contact centre administrators can configure break reasons and the time periods subsequently used in call recycling, and they are able to manage outbound groups and the call queue at a global level.



Options	Description
Tabs	
Global	Select, to display the Global View of the Campaign Manager
Breaks	For adding and editing Break Reasons that agents can select at run time in the Synthesys™ Portal when going on a break.
Time Periods	Setting the time bands used in call recycling to determine when aborted call backs are to be re-presented to the agents.
Import	For importing customer records from a file or database into a CRM Entity table, without the need to associate the import with a particular workspace.
Sections/ Buttons	
Global Call Queue	Clicking the **Show Queue** button users can view and manipulate queued records globally. Users can manage call queues at global, workspace, campaign, call list and outbound group level.
Outbound Groups	Clicking the **Create New Outbound Group** button users can add and manage outbound groups, to present records from multiple call lists to the agents.

Workspace View

When selecting a workspace in the tree structure on the left of the Campaign Manager, the page on the right will show the Workspace name and the Entity prefix in use for the selected workspace.



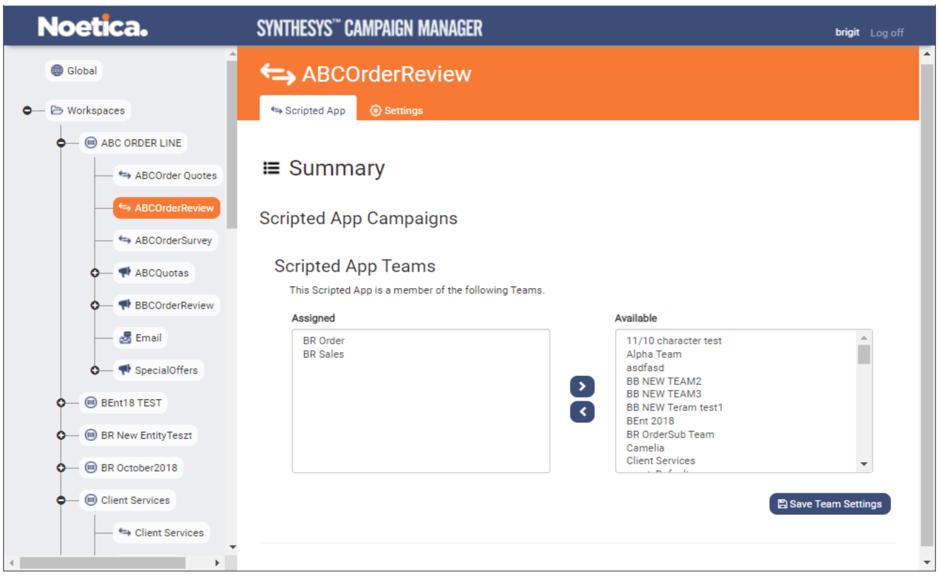
Options	Description
Tabs	
Workspace	Displays the workspace view of the Campaign Manager.
Organiser	Allows the creation of complex filters by combining existing simple filters. The Organiser is available at workspace, campaign, and list level.
Filters	Allows the creation of simple filters in the Filter Designer, specifying a set of conditions to define data segments within a CRM entity. Filters are always created at workspace level.
Settings	Shows available outbound list properties at campaign, list, and group level.
Recycling	Create recycling rules to determine when to re-present aborted calls to agents at run time. Recycling is available at workspace, campaign, and list level.
Templates	Allows the creation of Message Templates for Email and SMS campaigns.
Import	For importing customer records from a file or database into a CRM Entity table associated with a selected workspace.
Sections/ Buttons	
Workspace Call Queue	Clicking the **Show Queue** button, users can view and manipulate records queued for the selected workspace. Users can manage call queues at global, workspace, campaign, list, and outbound group level.
Queue Statistics	Via the **Display Summary** button users can view a summary of queue statistics for the selected workspace. Queue statistics can be viewed at workspace, campaign, outbound list, and group level.
Operations	The **Create Campaign** button is used to create a new campaign in the selected workspace. The **Delete Workspace** button is used to delete existing workspaces, providing that any dependent objects such as scripted apps, campaigns, lists and schedules have been removed first.

Scripted App View

When selecting a scripted app in the tree structure on the left of the Campaign Manager, the page on the right shows the scripted app name, plus a **Scripted App** and **Settings** tab. An extra **DDI** tab will be available for clients who do not use the Noetica Voice Platform (NVP).

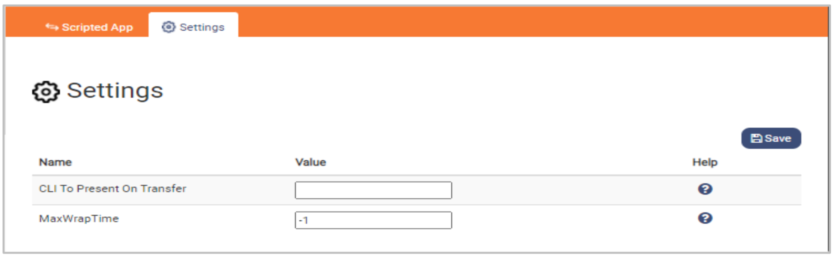
Scripted App

In the **Teams** section of the Scripted App tab, you can assign or reassign the relevant Team(s) to the selected scripted app. Click the **Save Team Settings** button, to save any changes made.



Settings

In the **Settings** page, you add scripted app related settings, as required, such as the CLI to present on transfer, or a maximum wrap up time.



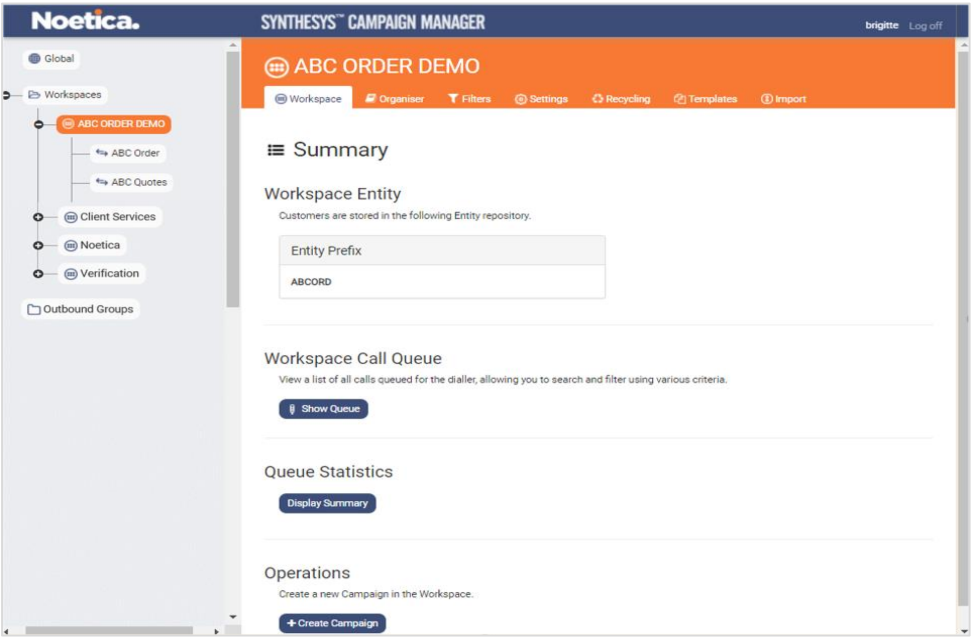
DDI

Clients who do not use the NVP will have access to a DDI tab, where they can assign Inbound numbers to the scripted app that will pop for the campaign the agent is working in the Agent Portal.

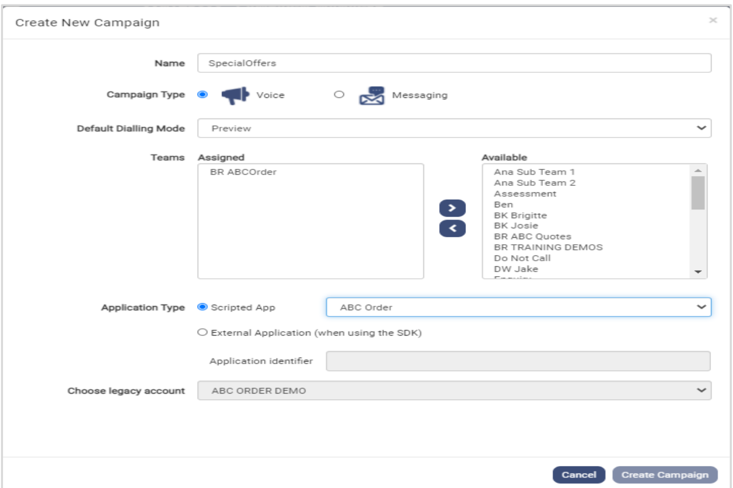
Creating a new Campaign

To add a new Voice campaign to a workspace

- Select the workspace for which you want to add the new campaign.
- Check that an Entity prefix has been allocated to the workspace.
- Click the **+Create Campaign** button under the Operations heading.



- In the Create New Campaign dialog, select the **Campaign Type**, i.e., Voice for creating Outbound call lists (Messaging, for Email and SMS lists). For Voice campaigns, select the **Default Dialling Mode (**Preview, Predictive or Unattended Dialling).
- Enter a name for the new campaign into the **Name** field.
- Use the Remove/ Assign buttons, to assign the relevant Team(s) to the campaign.

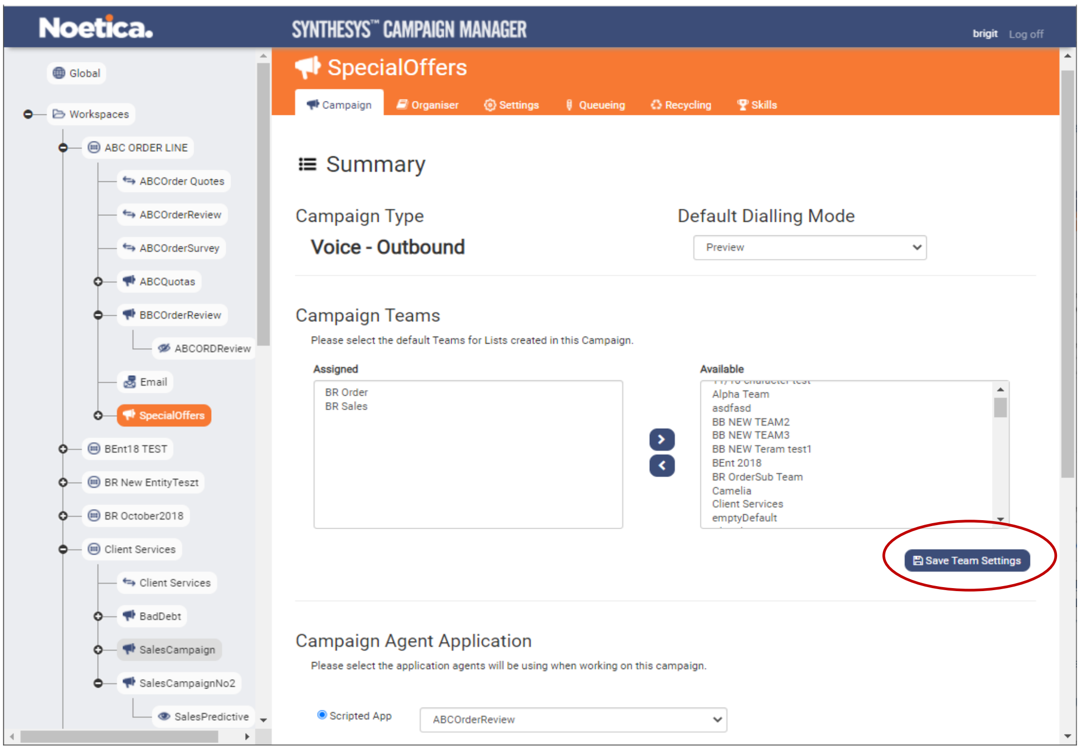


- Next, select the **Application Type**, i.e., the Scripted App to be used with the campaign, or select *External Application* and assign the associated Application identifier, if you are using Dialler & Telephony SDK to pop a third-party application.
- **Choose a Legacy Account** if the associated workspace is not already displayed.
- Click **Create Campaign** to create the new campaign or **Cancel** the action.

Campaign View

The campaign view shows the Campaign Name, Campaign Type and Call Mode and the Scripted App the agent will be working.

- In the **Campaign Teams** section, you can assign or reassign the selected campaign to the relevant Team(s). Click the **Save Team Settings** button, to save any changes made.

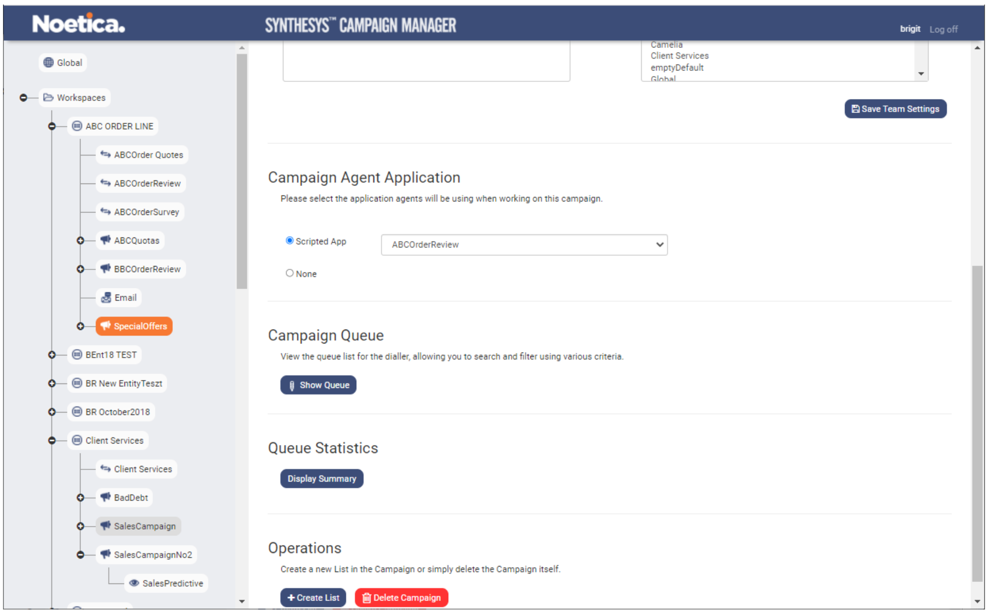


Tabs	Description
Campaigns	Displays the campaign view in the Campaign Manager.
Organiser	Allows the creation of complex filters by combining existing simple filters. The Organiser is available at workspace, campaign, and list level.
Settings	Shows available call list properties at campaign, list, and group level.
Queueing	Placing customer records into call lists. Queueing is available at campaign level.
Recycling	Creating recycling rules to determine when to re-present aborted calls to agents at run time. Recycling is available at workspace, campaign, and list level.
Skills	SABRE™ (Skills & Ability Based Routing Engine) allows the routing of Inbound and Outbound activity to users based on their skill and competence level.
Sections/ Buttons	
Campaign Type	Shows if the campaign is a Voice or Messaging campaign.
Campaign Teams	Used to select the team(s) to which the selected campaign should be assigned.
Campaign Agent Application	Used to select and assign the application agents will be using when working on this campaign, i.e., the scripted app or an external application and customised call outcomes when using Dialler & Telephony SDK.
Campaign Queue	Clicking the Show Queue button, users can view and manipulate records queued for the selected campaign. Users can manage call queues at global, workspace, campaign, outbound list, and group level.
Queue Statistics	Clicking the Display Summary button users can view a summary of queue statistics for the selected campaign. Users can view queue statistics at workspace, campaign, outbound list, and group level.
Operations	Create List button for creating a new outbound list for the selected campaign. Delete Campaign button for deleting a selected campaign.

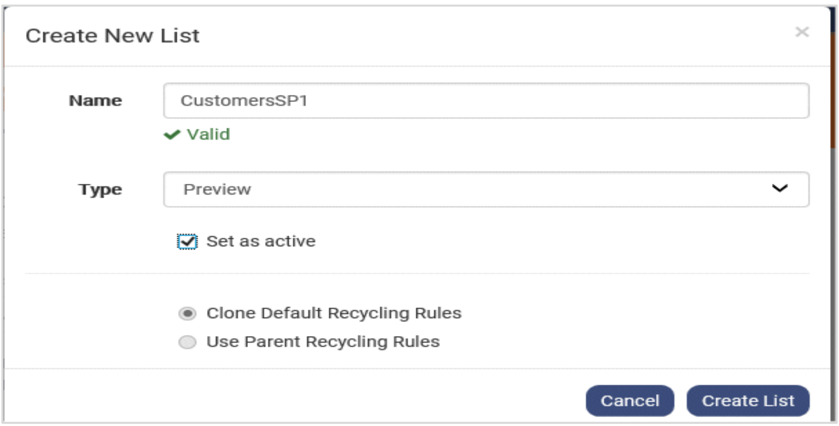
Creating a new Outbound List

Outbound call lists can be added to any campaign with an assigned scripted app.

- Select the campaign for which you want to add the new outbound list.
- If not already assigned, select the scripted app to be used with the call list.



- Click the **+Create List** button under the Operations heading, to open the Create New List dialog.
- Enter a name for your new outbound list into the **Name** field.

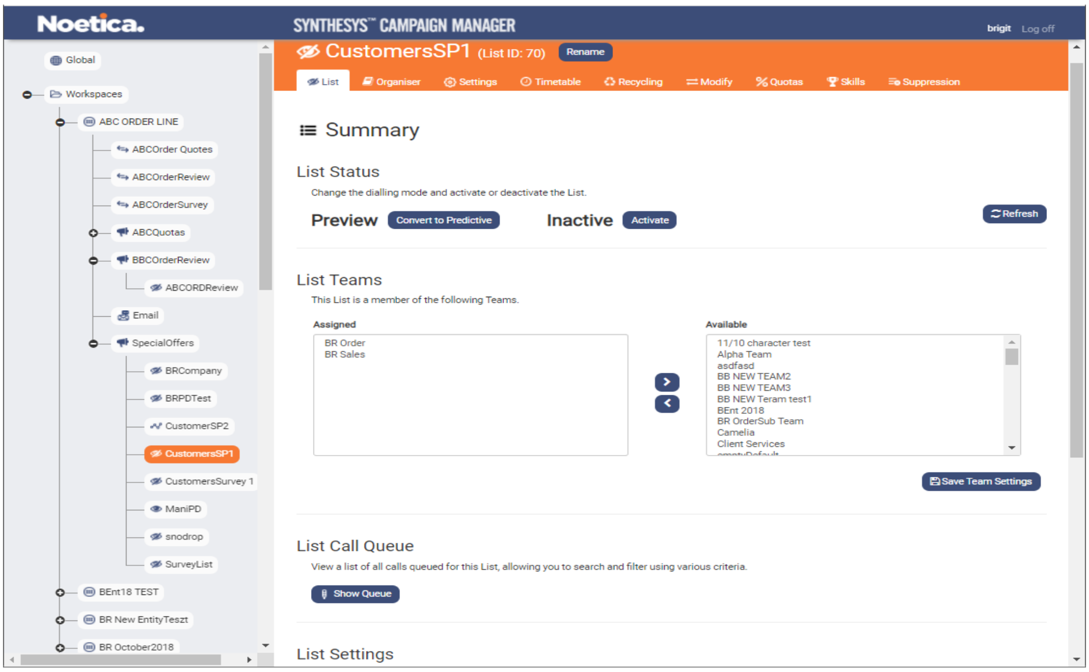


- Select **Preview or Predictive**, depending on the type of list that you wish to create.
- To activate the list immediately, tick **Set as active.**
- To use the default recycling rules for the new call list, select **Clone Default Recycling Rules.** To use the recycling rules created specifically for the selected workspace or campaign, select **Use Parent Recycling Rules**.
- To create a new outbound list, click the **Create List** button, else click **Cancel**.
- A message will confirm that the list has been created.

Outbound List View

The list view displays the List name, List ID, List Status, List Settings, and associated information.

- In the **List Teams** section, you can assign or reassign the selected list to the relevant Team(s). Click the **Save Team Settings** button, to save any changes made.



Tabs	Description
List	Displays the List view in the Campaign Manager.
Organiser	Allows the creation of complex filters by combining existing simple filters. The Organiser is available at workspace, campaign, and list level.
Settings	Shows available outbound list properties at campaign, list, and level.
Timetable	To set the date and time during which calls from the selected outbound list should be taken. The option is available at group and list level.
Recycling	Create recycling rules to determine when to re-present aborted calls to agents at run time. Recycling is available at workspace, campaign, and list level.
Modify	Allows instant or scheduled manipulation of queued items of all or a selected call list.
Quotas	Used to deactivate a call list automatically when a predefined number of calls on a specified call result is achieved and written to the database.
Skills	SABRE™ (Skills & Ability Based Routing Engine) allows the routing of Inbound and Outbound activity to users based on their skill and competence level.
Suppression	Monitors an external database table and based on conditions set on that table removes records from the queue, if specified criteria are met.
Sections/ Buttons	
List Status	Allows users to convert outbound lists from preview to predictive and vice versa and to activate or deactivate outbound lists.
List Teams	Used to select the **Team**(s) to which the selected list should be assigned.
List Call Queue	Clicking the **Show Queue** button, users can view and manipulate records in the selected list. Call queues can be managed at global, workspace, campaign, list, and group level.
List Settings	Allows users to set a priority for the selected list, from 0 to 10 (high).
Operations	Delete a de-activated outbound list clicking the **Delete List** button.
Queue Statistics	The **Display Summary** button shows a summary of queue statistics for the selected call list. Queue statistics can be viewed at workspace, campaign, list, and group level.
Process Do Not Call List	For checking and removing records from an outbound call list, if the telephone number is found in the Phoenix_DoNotCallList table.

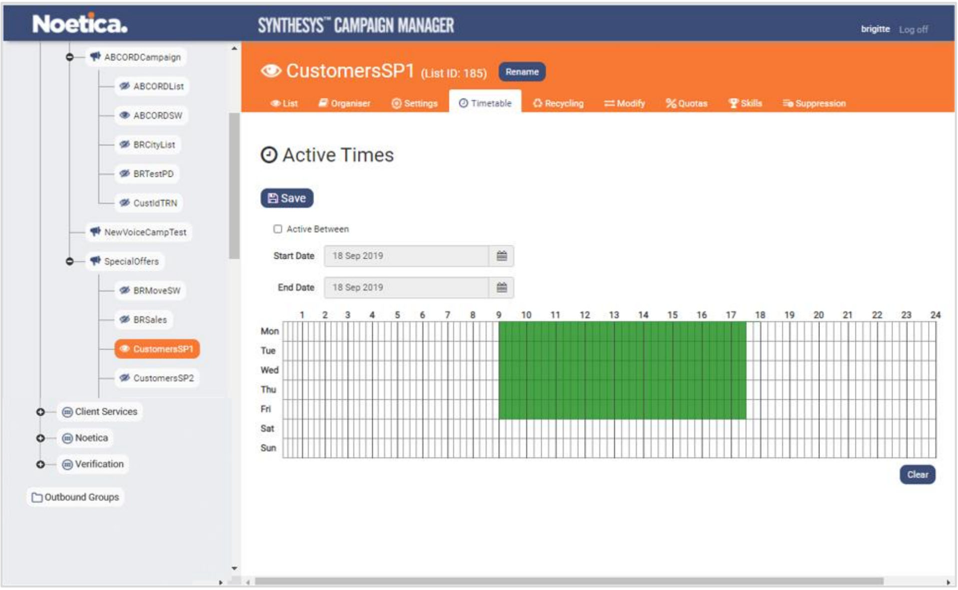
TIMETABLE

In the Active Times dialog, available via the Timetable tab at call list and outbound group level, you can specify the date and time during which calls for a selected active outbound list will be presented to agents at run time.

Setting Outbound List Call Times

- Select the outbound list for which you want to specify call times.
- Click the **Timetable** tab at the top right of the List dialog.

Active Times, displaying green cells, are by default enabled from 09:00 to 17:30, Monday to Friday.



Changing Call Time settings

- To activate additional time slots, move your mouse pointer to the required time cell and drag the pointer from left to right, to activate the desired time slot.
- To de-select active times, move your mouse pointer to the required activated time cell and drag the pointer from left to right.
- To deactivate all active time periods, click the ‘Clear’ button at the bottom right of the Active Times dialog.

Setting Outbound List Start and End Date

- To set a *Start Date* and an *End Date* for your outbound list, tick the **Active between** checkbox and then select the required dates from the respective diary pages.

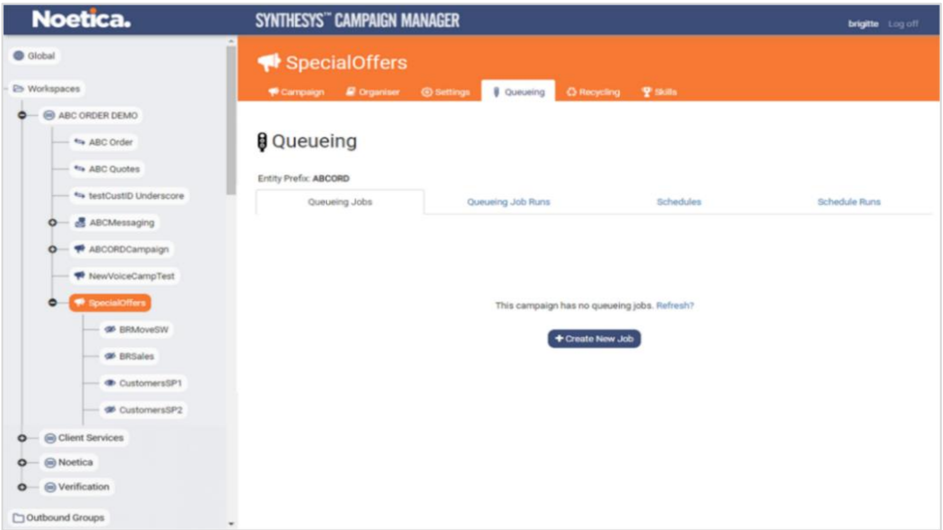
QUEUEING RECORDS

Creating a Queueing Job

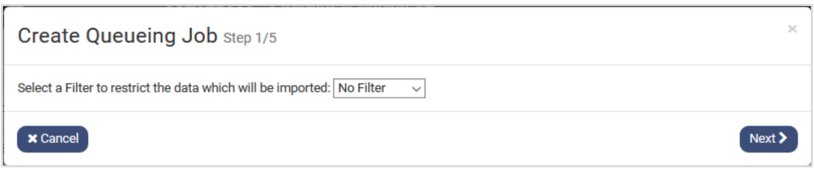
Details for the queueing conditions are defined at campaign level.

- Select the campaign that contains the lists to be used for your queueing job.
- Click the **Queueing** tab at the top right of the Campaign Manager dialog.
- In the Queueing dialog, click **+Create New Job**.

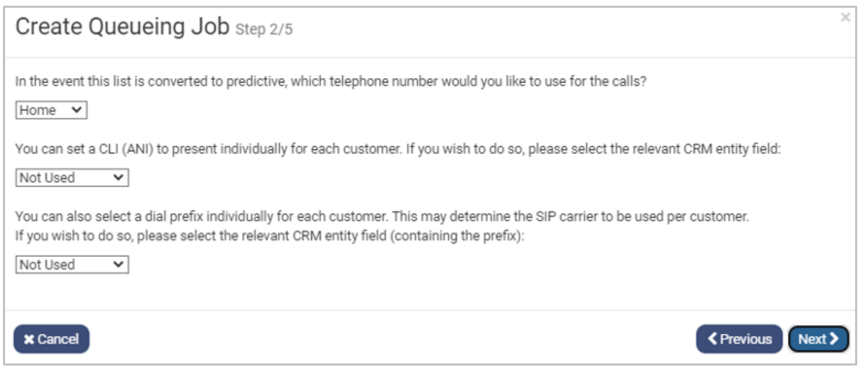
If you wish to queue selected customer entity data only, go to the **Filters** tab at **Workspace** level first, to create your filters, as required, specifying the conditions for the queueing job in the Filter Designer.



- To apply an existing filter to queue certain entity records only, select the filter from the drop-down list. To queue all records, skip this step by clicking Next>.

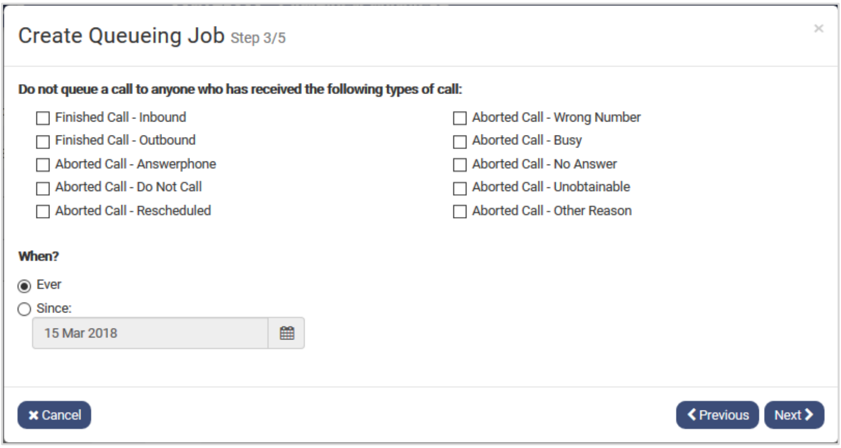


- Select the telephone number that should be called first, in the event of the campaign being turned into a Predictive Outbound list.
- You can also set a CLI (ANI) to present, and a Dial Prefix, by selecting the relevant CRM Entity field, providing that the Entity field used is NOT a telephone property type field.

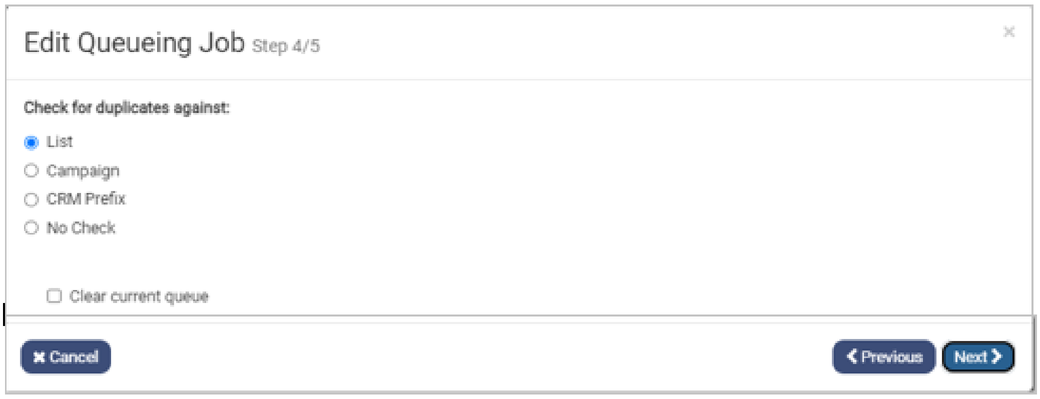


Queueing Restrictions and Duplicate Checks

- To ***exclude*** records from being queued again into the current list, based on previous contact with a customer, place a tick into the boxes next to the relevant call outcome, and specify a date if required.



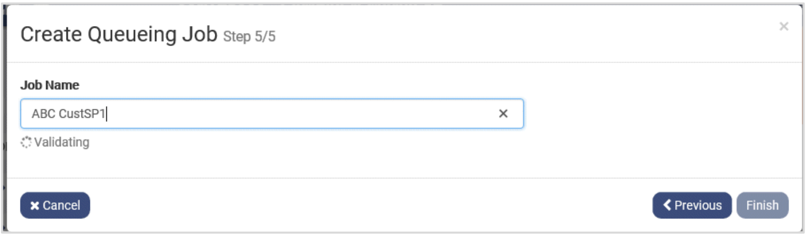
- The next step enables you to check for possible duplicates at list or campaign level, or against the CRM/ Entity prefix.



Duplicate Check	Description
List	To check the call list selected for duplicates.
Campaign	To check all call lists associated with the selected campaign for duplicates.
CRM Prefix	To check all call lists that use the same Entity/ CRM prefix for duplicates.
No Check	Select, if you do not need to check for duplicates, for example queueing calls for a new campaign.
Clear current queue	To remove customers from the selected call list before queueing calls.
Update all fields	Tick only to update all fields within your CRM, do NOT tick, if only selected fields are to be updated.

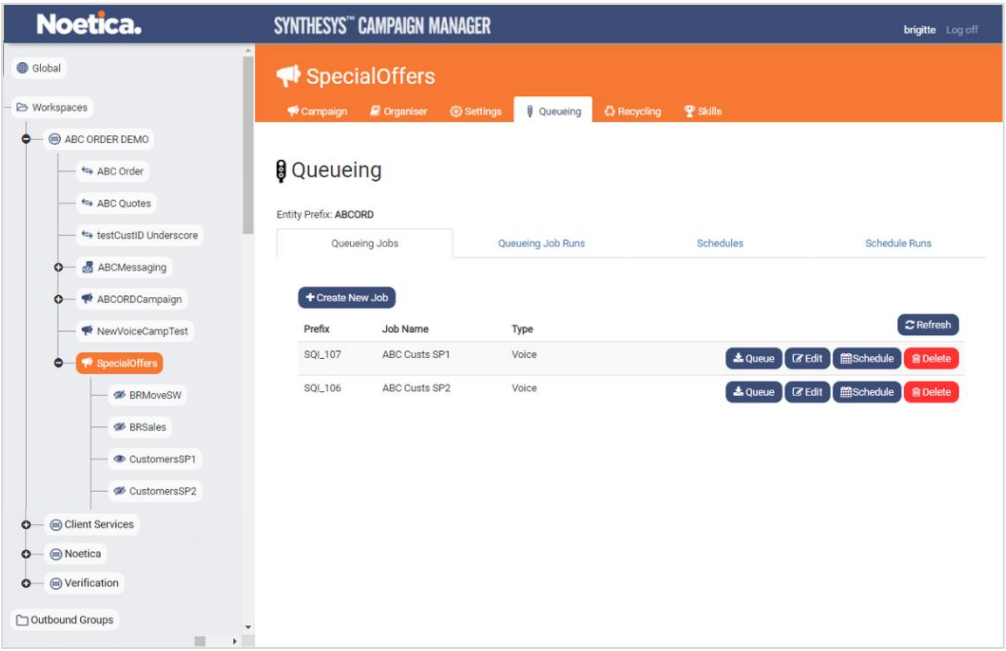
Saving Conditions specified

- Enter a name for the queueing job into the **Job Name** field.
- Click **Finish** to save the queueing job, or cancel the action.



A message “Job created” will confirm that the queueing details have been saved. The prefix and name of the queueing job will be displayed in the Queueing dialog.

You can define and save any further queueing jobs, as required.



Queueing jobs are managed at campaign level and can be run immediately, or you can create a schedule to run the selected queueing job at specified intervals.

Button	Description
Queue	Run the queueing job immediately, to and place the matching records into the relevant call list.
Edit	View or make changes to an existing queueing job.
Schedule	Create a schedule to run the selected queueing job at specified intervals.
Delete	Delete the selected queueing job.

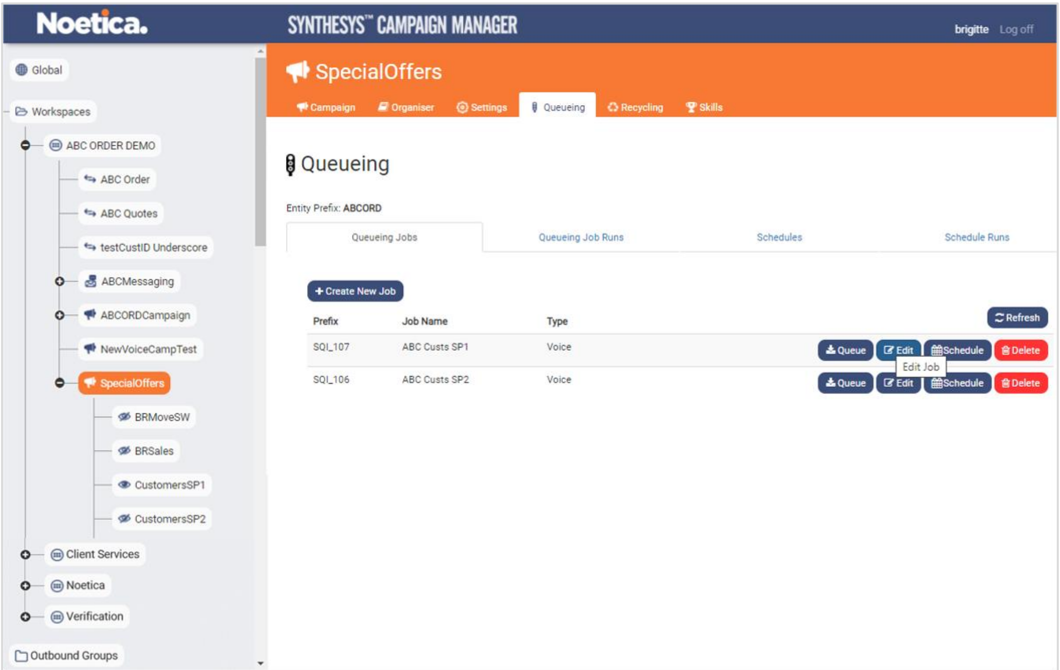
Having defined the conditions for your queueing job, you can view or edit details, if required, before you decide to run the queueing job.

Please see the next page for more information.

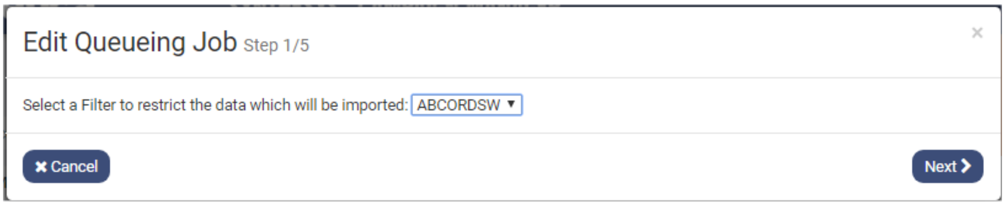
Editing Queueing Jobs

If you wish to check or edit an existing queueing job

- Select the campaign and the queueing job that you wish to view or amend.
- Click the **Edit button** for the existing queueing job.



- Move through the pages of the **Edit Queueing Job** wizard, where you can view or change any existing filters, selected telephone numbers or list settings, as required.

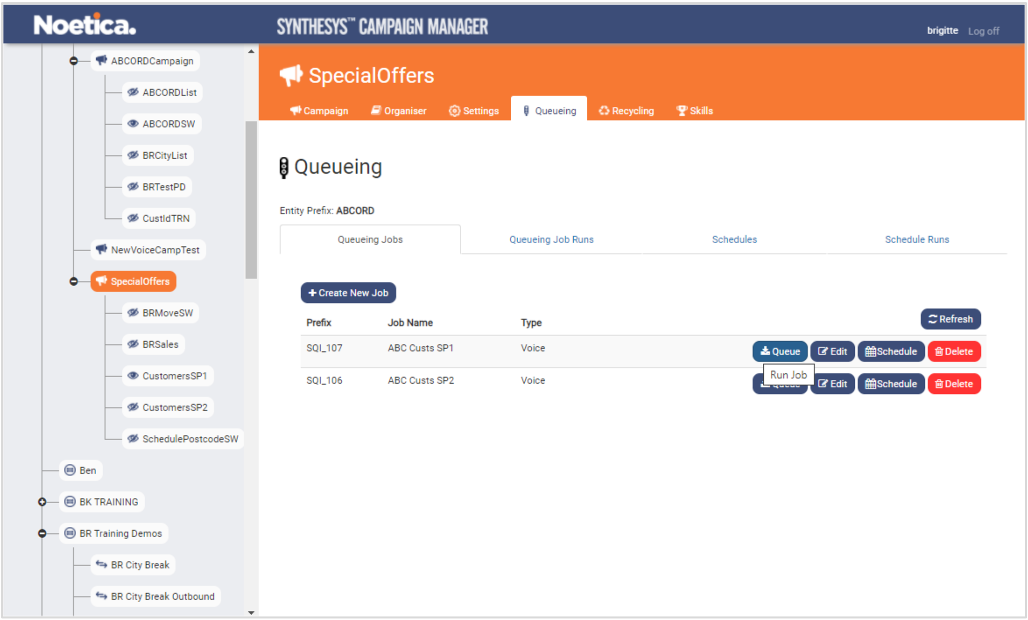


With the queueing conditions in place and confirmed, the next step is to run the queueing job, placing customer records into your respective call lists.

Please see the next page for more information.

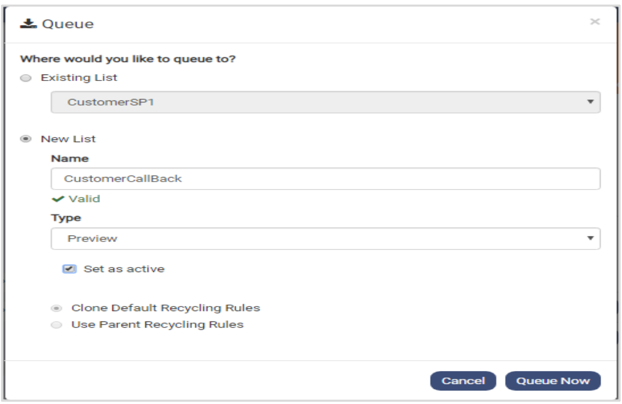
Running Queueing Jobs Instantly

- At campaign level, in the Queueing dialog, select the queueing job that you wish to run instantly, and click the **Queue** button.



Queueing Records to an existing or a new List

- **Existing List**: To queue records into an existing list, click **Existing List,** select the name of the list from the drop-down menu and click the **Queue Now** button.
- **New List:** To queue records into a new list, select **New List,** and enter a name for the new call list into the **New List Name** field.
- Specify the list **Type (**Preview, Predictive, etc.) and tick **Set to active,** if you want to activate the list immediately.

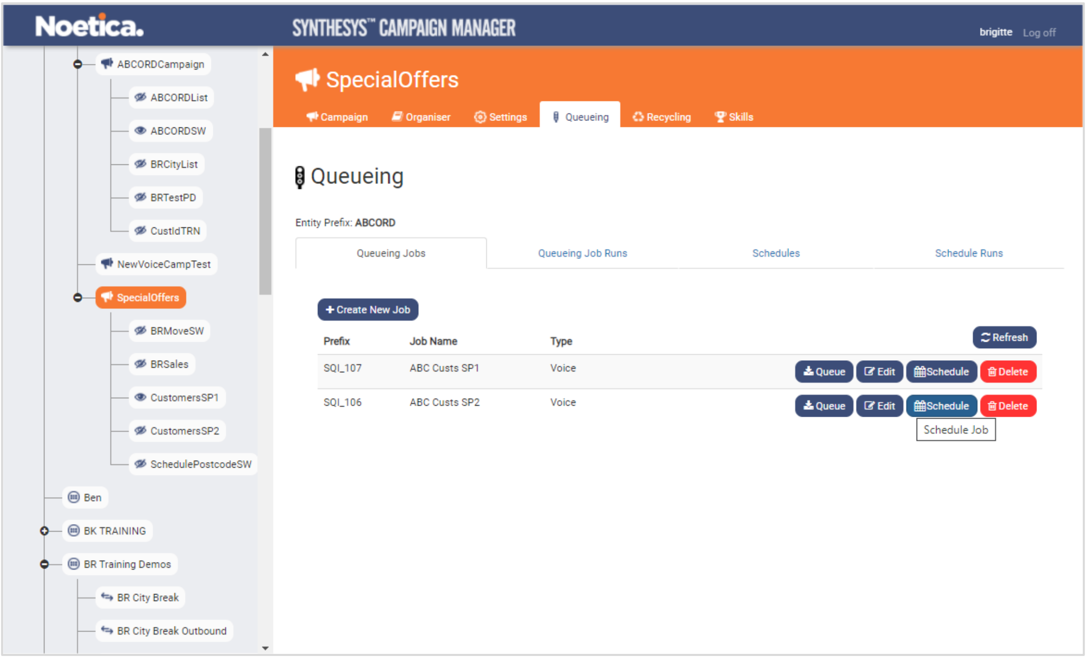


- To use the default recycling rules for the new call list, select **Clone Default Recycling Rules.** To use the recycling rules created specifically for the selected workspace or campaign, select **Use Parent Recycling Rules**.
- Click the Queue Now button to place the records into the new list. A message will confirm the number of records that have been queued.

Scheduling Queueing Jobs

To schedule a queueing job to run at specified intervals

- At campaign level, in the Queueing dialog, select the queueing job that you wish to run, and click the **Schedule** button.



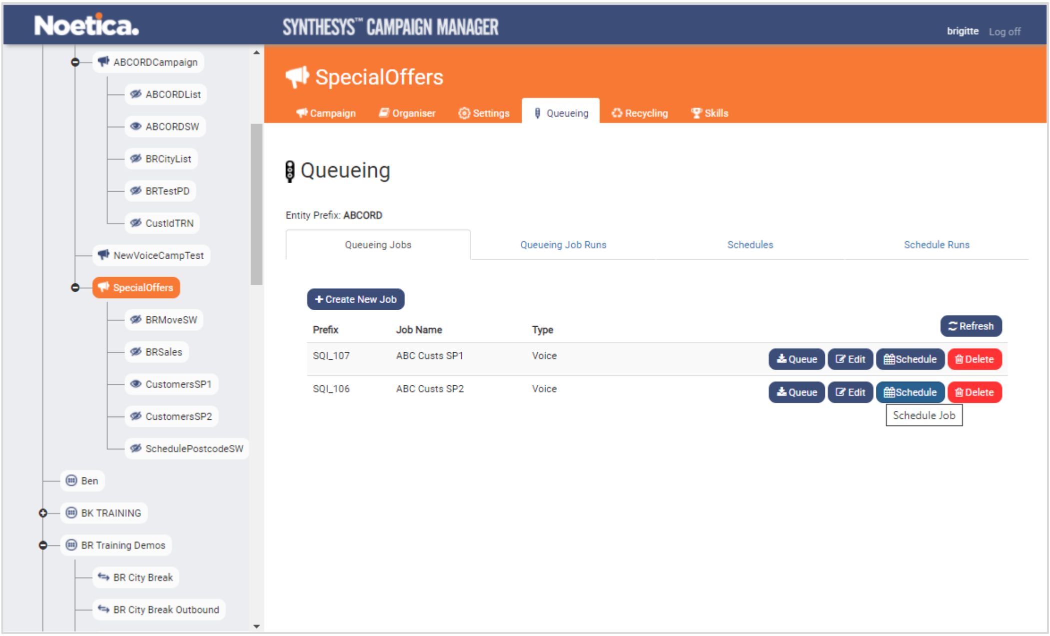
When scheduling your queueing jobs, you can define the intervals for the queueing process and set a start and end date. Please take a look at the frequency table below.

Frequency Options for Schedule Runs

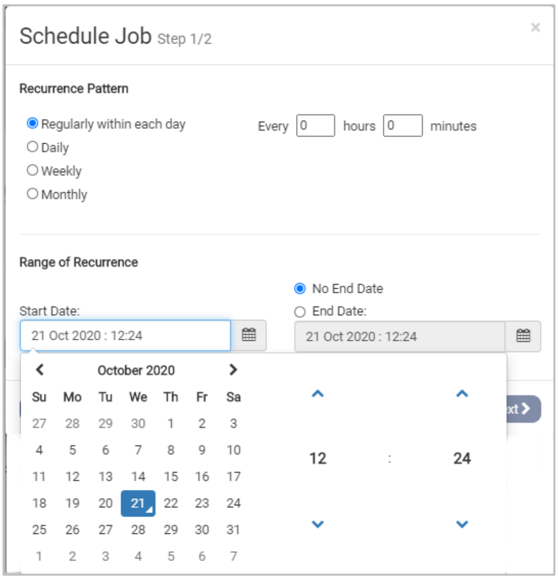
Frequency	Description
Recurrence Pattern	
Regularly within each day	To run your queueing job every so many hours or minutes, e.g., every 2 hours, or every 30 minutes.
Daily	To run your queueing job daily, or at the specified frequency, for example every 2 or 3 days.
Weekly	To run your queueing job at specific days of the week, e.g. every Monday, Wednesday and Friday, or every Saturday.
Monthly	Allows you to select certain patterns for monthly queueing jobs, for example,the first day of every month, or the last Friday of every month.
Range of Recurrence	
Start Date	Select a start date for your queueing job.
End Date	Select an end date for your queueing job, if required.
No End Date	Select to run your queueing job indefinitely

Adding Schedule Frequency

Having selected the **Schedule** option in the Queueing dialog, you can now decide the frequency for your queueing process.



- In the **Recurrence Pattern** section, select either Regularly within each day, Daily, Weekly or Monthly.
- Depending on your selection you can specify further details as described in the frequency table on the previous page.



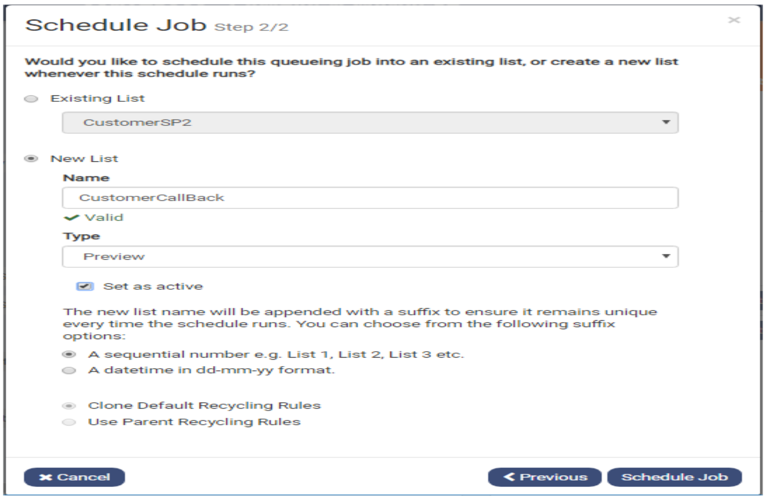
- In the **Range of Recurrence** section, select a start date for the schedule.
- You can then specify an **End Date** or continue to run your schedule indefinitely by selecting the **No End Date** option.
- Click the **Next>** button to schedule your queueing job, to place records either into an existing or a new call list, as required.

Scheduling Queueing Job to existing List

- To queue records into an existing list, click **Existing List.**
- Select the list to be used for your queueing process from the drop-down menu.
- Click the **Schedule Job** button to save the information and to run the schedule at the specified time. A message will confirm that the job has been scheduled.

Scheduling Queueing Job to new List

- To queue records into a new list, select **New List,** and enter a name for the new call list into the **New List Name** field.
- Specify the list **Type (**e.g., Preview, Predictive), and tick **Set to active,** if you want to activate the list immediately.
- Choose if you wish to attach a sequential number or a date/time stamp to the list, to ensure that the list name remains unique.

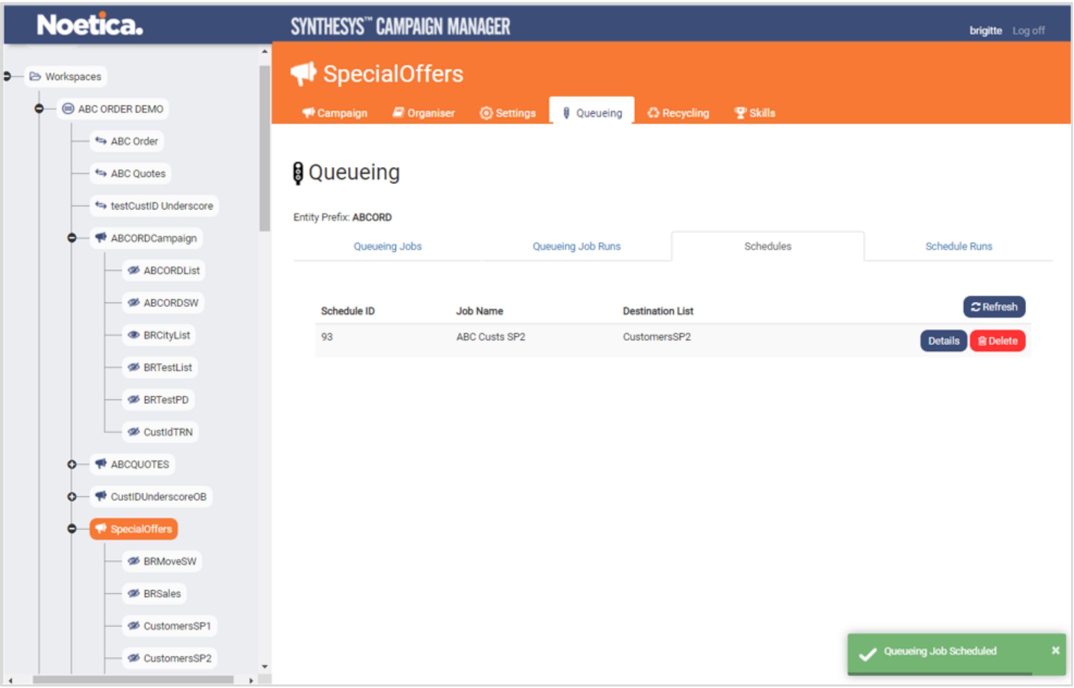


- To use the default recycling rules for the new list, select **Clone Default Recycling Rules**. To use the recycling rules created specifically for the selected workspace or campaign, select **Use Parent Recycling Rules**.
- Click the **Schedule Job** button to save the information and to run the schedule at the specified time. A message will confirm that the job has been scheduled.

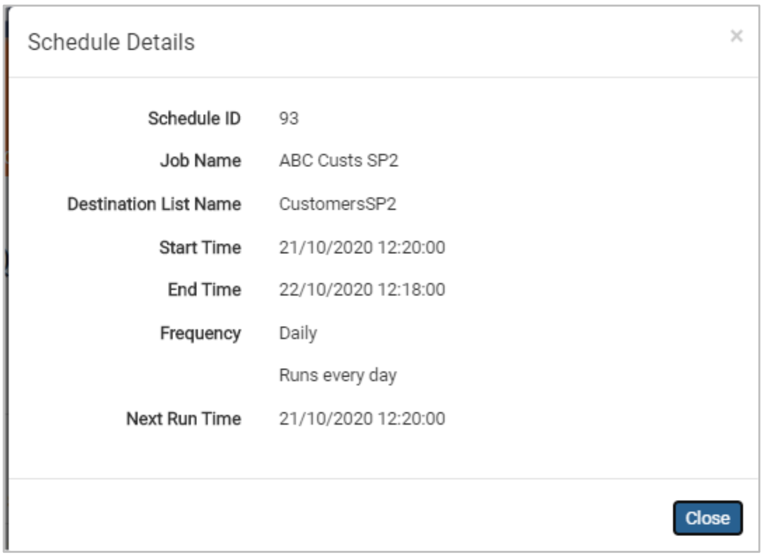
Viewing Schedule Details

To view details of existing queueing schedules

- Select the campaign that contains the queueing schedules that you wish to view.
- Click the **Queueing** tab at the top right of the campaign dialog.
- In the Queueing page, select the **Schedules** option.



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



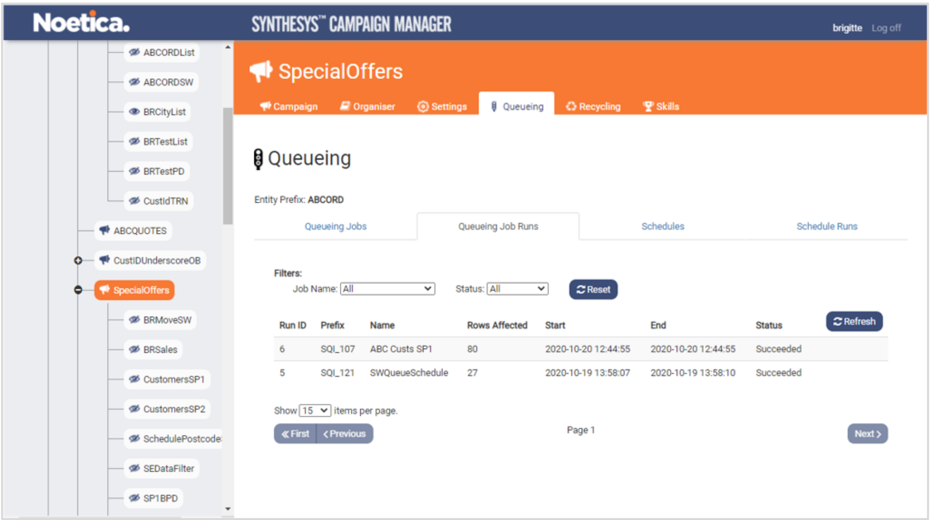
- To delete an existing queueing schedule, click the **Delete** button.

Viewing Queueing Job Runs

Instant Queueing Job Runs

To check details of instant queueing job runs for a campaign

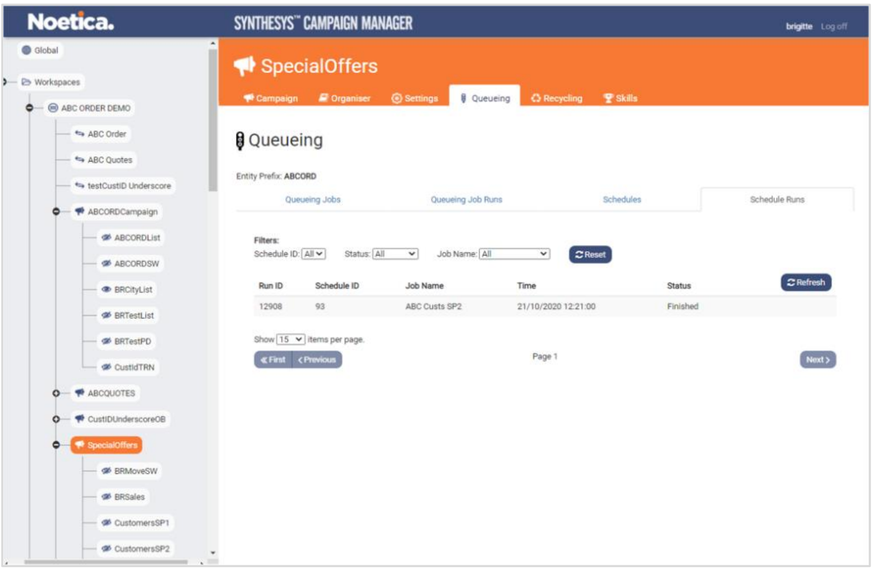
- Click the **Queueing** tab at the top right of the campaign dialog.
- In the Queueing page, select the **Queueing Job Runs** option.
- Use the **Filters** options *Job Name* and *Status* to display schedule runs for specific schedule jobs or schedule outcomes only.



Scheduled Queueing Job Runs

To check details of existing queueing schedule runs for a campaign

- Click the **Queueing** tab at the top right of the campaign dialog.
- In the Queueing page, select the **Schedule Runs** option.

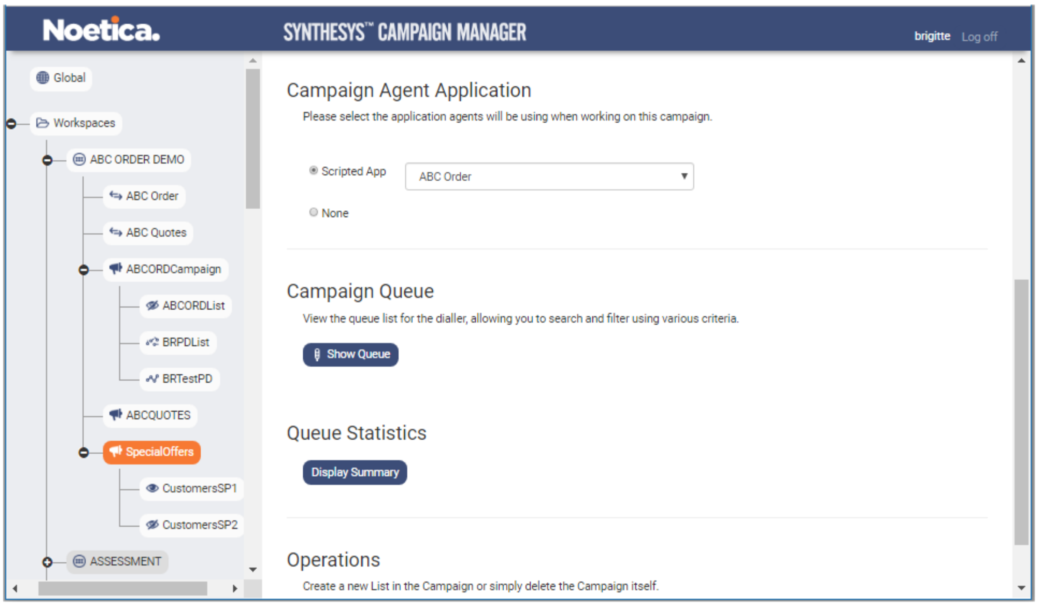


- Use the **Filters** options *Schedule ID*, *Status* and *Job Name,* to display schedule runs for specific schedule id’s, schedule outcomes or schedule jobs only.

VIEWING QUEUE STATISTICS

You can view a summary of queue statistics at workspace, campaign, outbound list and group level.

- Select either the workspace, campaign, list, or group, as required.
- In the dialog on the right, under **Queue Statistics**, click the **Display Summary** button.



The Queue Statistics dialog shows statistical information of all calls queued for the selected workspace, campaign, list, or group.

Queue Statistics

Summary — Refresh

Summary	
Done	13
Queued	189
Scheduled	2
Attention	3
Never Call	1
Running	12
Sleeping	9
Wrong Number	2
Unobtainable	2
Predictive Running	0
Recycling Complete	0
Emergency	3
Moved	0
Total	**236**

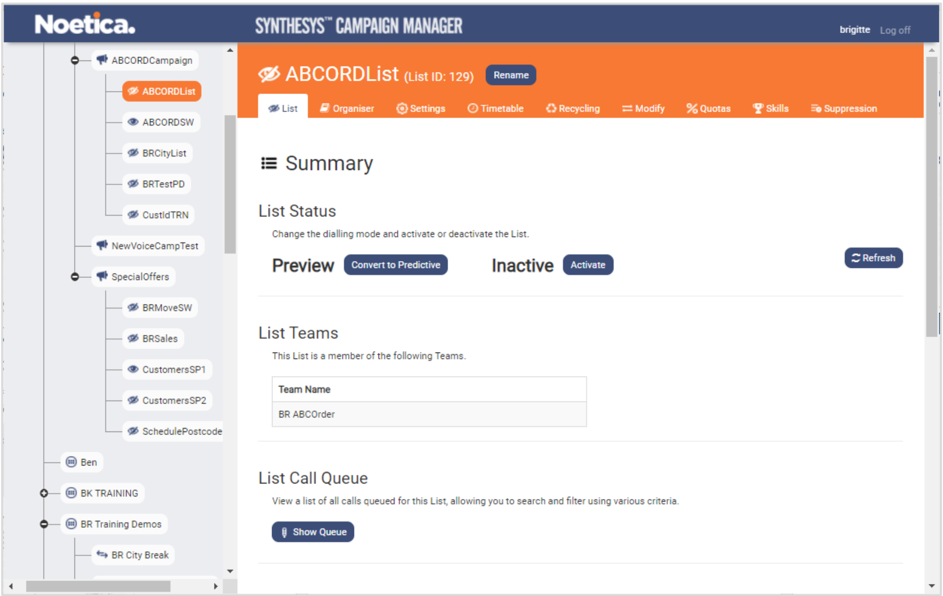
The queue in our example shows a total of 236 calls:

13	calls have been done/ completed
189	calls are queued
2	calls are scheduled to be taken at a specified time
3	calls are set for attention of the supervisor
1	record is not to be called anymore
12	calls are currently being processed
9	calls have sleeping status, to be taken at a specified time
2	calls were aborted as wrong number
2	calls are set as unavailable
3	calls are set as priority/ emergency for instant call back

VIEWING QUEUED RECORDS

You can view your queue lists at global, workspace, campaign, outbound list, and group level.

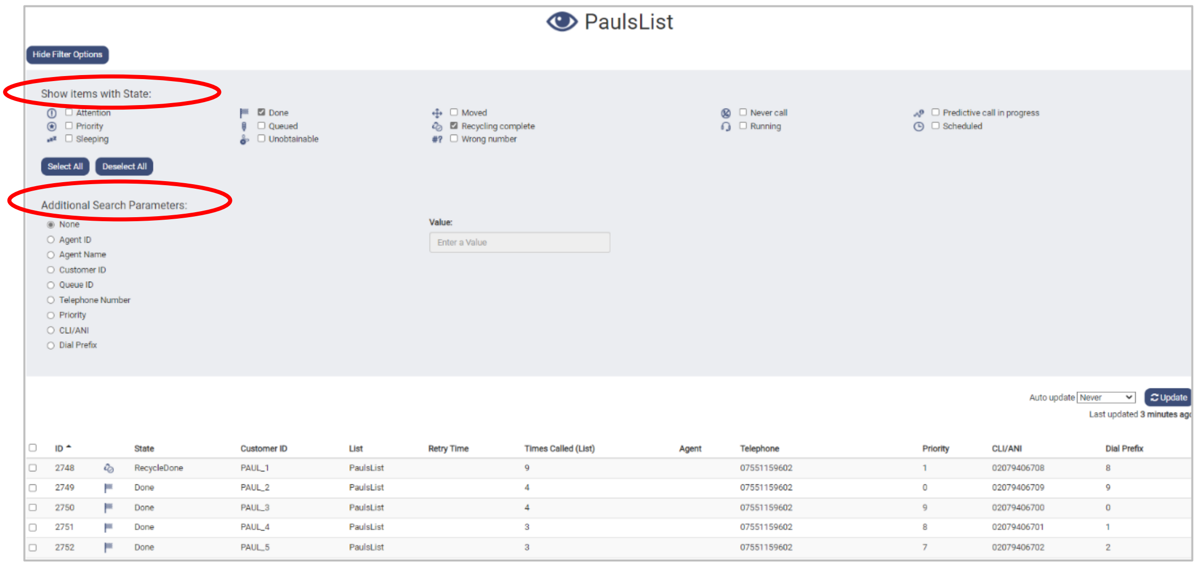
- Select either global, the workspace, campaign, list, or group, as required.
- In the dialog on the right, click the **Show Queue** button.



The Queue dialog at campaign level for example, will show the queued items for all call lists set up under the selected campaign.

The telephone column shows both, the telephone number and name, to allow call cycles and recycling to cope with the same telephone number in multiple telephone fields.

- To filter out and display specific call outcomes, click **Show Filter Option**.
- Use the **Show Items with State** or **Advanced Search Parameters** section, to select or add your search criteria, to return associated records.



Explanation of Queue States

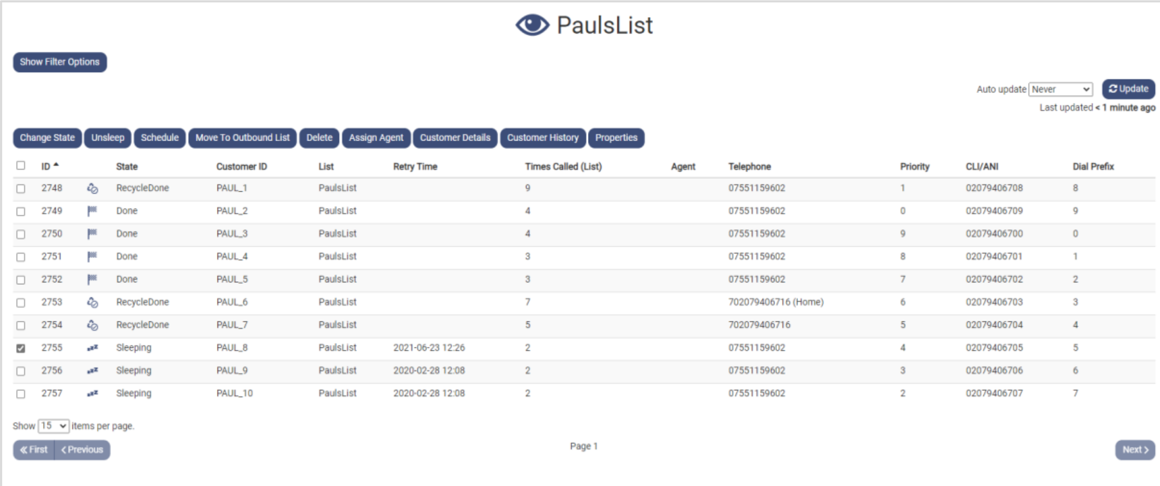
The following table shows a list of available queue states:

Icon	Description	Queue State
	Done, refers to outbound calls, which have been completed.	0
	Queued, shows calls in the queue waiting to be taken; providing that the list is activated.	1
	Scheduled, refers to calls that have been scheduled to be taken at a specified time.	2
	Attention, shows calls that have been aborted needing a supervisor's attention.	3
	Never Call, lists clients, who do not wish to be contacted anymore.	4
	Running, shows outbound calls in process.	5
zzZ	**Sleeping**, refers to calls waiting to be put back into the queue.	6
#?	**Wrong Number**, shows an incorrect number associated with a client to be called.	9
	Unobtainable, is a number that is not obtainable.	10
	Predictive Running, shows a predictive call in progress / running	11
	Recycling Done, shows a completed recycling strategy	12
	Priority, shows calls due for an instant call back	14
	Moved, shows calls that have been moved to another OB list as part of call recycling using the re-queued or change campaign options.	15
zzZ	**Waiting For Agent,** shows calls which agents have requested as their next call in the Agent Diary web part.	17

The next page will describe the options available for manually changing the state of selected call outcomes.

Changing Queue States

If you place a tick into the checkbox next to a call outcome, tab headings will display the associated options available for a state change.

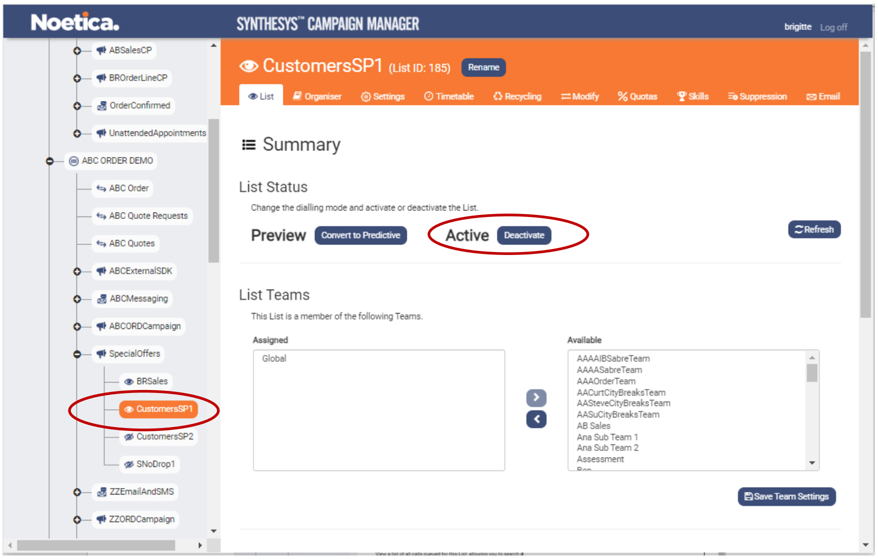


Option	Description
Change State	Change the state of a queued record to either Done, Attention, Never call, Wrong number, Unobtainable or Priority.
Sleep	Set a waiting period, before the call is placed back into the queue for outbound calls to be taken.
Unsleep	Change a sleeping call back to queue state.
Schedule	Display the *Schedule Call* window where you can set the date and time frame in which the call should be taken.
Move to Outbound List	Move calls from one Outbound list to another.
Delete	Delete the highlighted customer from the queue.
Assign Agent	From the drop-down list, select the agent that is to take the outbound call for the selected customer, Due Sleeping calls assigned to an operator will change to Reschedule state.
Customer Details	Allows contact centre administrators and dialler managers with *View Customer Data* user permissions to view details of the customer held in the CRM Entity.
Customer History	Allows contact centre administrators and dialler managers with *View Customer Data* user permissions to view customer history events.
Properties	Display detailed information about a queued call.
Times Called Information	Details about the number of times called for the selected **Queue ID**, **Lead ID** and **Customer** record.

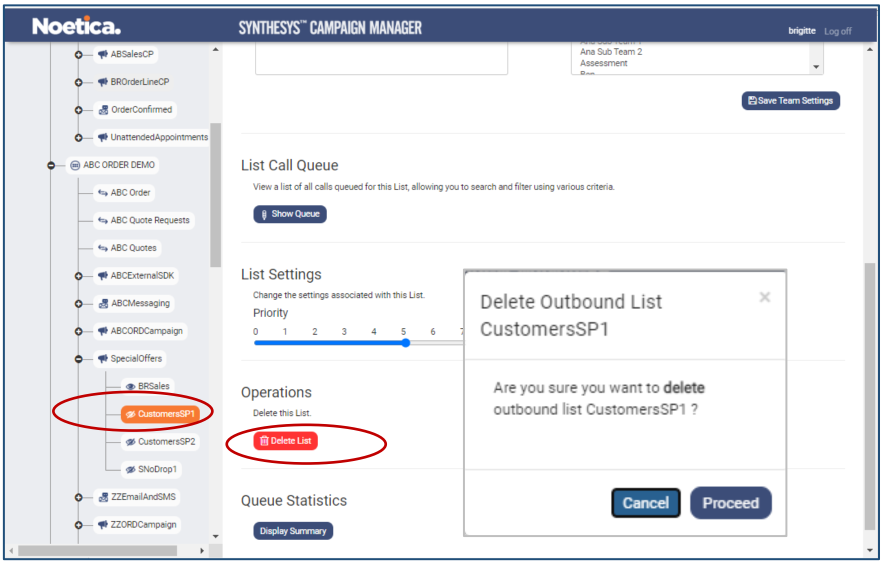
DELETING OUTBOUND LISTS

If you want to delete an Outbound list and the associated queued records

- Select the Outbound list that you wish to delete.
- If the list is currently activated, click the **Deactivate** button in the List Status section.



- Now that the Outbound lists is **Inactive**, scroll down to the Operations section and click the **Delete List** button.



When deleting an outbound list, you will automatically also delete the queued items associated with that list.

If there are scheduled queue or bulk queue change jobs assigned to the list that is to be deleted, the Proceed button will be greyed out and you need to delete these jobs first, before the list can be removed.

FILTERS

The **Filters** option, available at workspace (CRM Entity) level, is used to create simple filters in the Filter Designer by specifying a set of conditions based on Entity data and/ or the Queue state of a record.

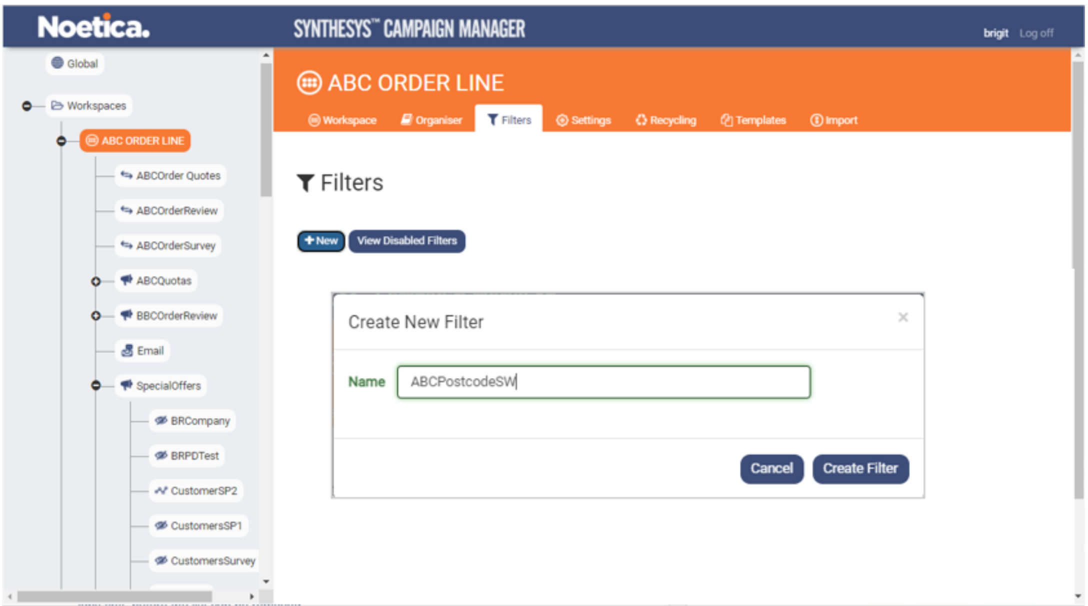
Filter conditions based on **Entity** data can be used, for example, as part of the queueing process, to determine which records are to be placed into a call list.

Filter conditions based on the **Queue** state of a record and/ or **Entity** data could be used in Bulk Queue Change to help managing outbound call lists.

Creating new Filters

To create a new filter

- Select the relevant Workspace in the tree structure on the left of the Campaign Manager.
- Click the **Filters** tab in the screen on the right, to display the Filters screen.



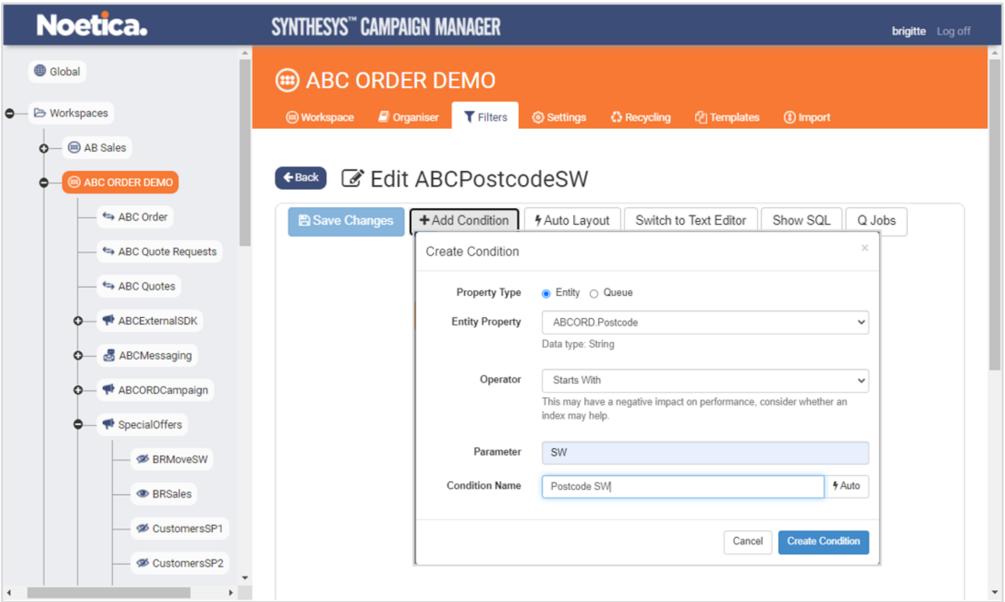
- Click the **+New** button to open the **Create New Filter** dialog.
- Enter a descriptive name for the filter into the **Name** field.
- Click the **Create Filter** button, to open the Filters dialog.

The next pages will describe how you can define the required filter conditions in the Filter Designer.

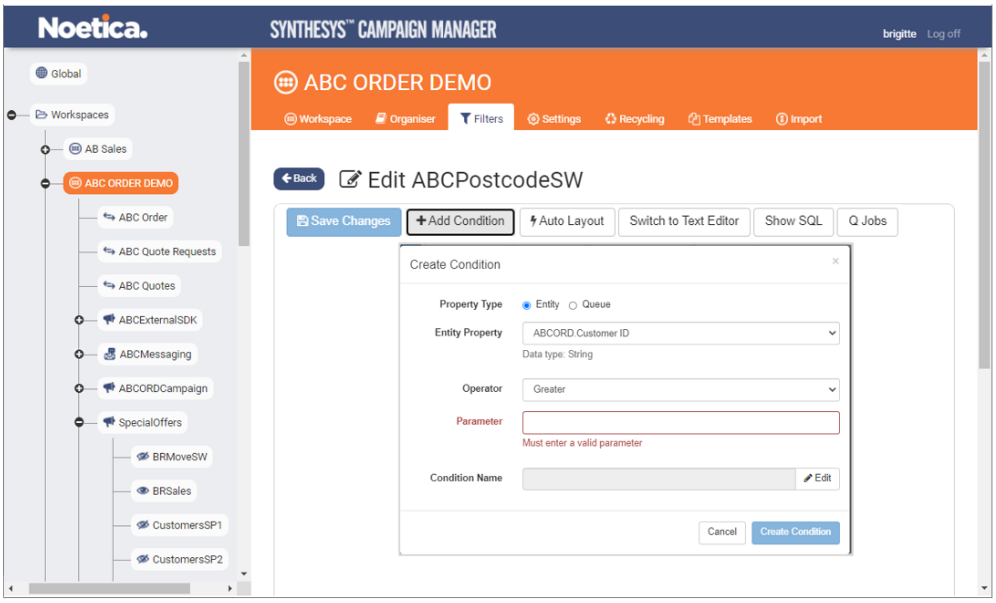
Defining Conditions based on Entity Data.

To create a filter by specifying conditions based on data segments within a CRM/ Entity:

- Click **+Add Condition** to open the Create Condition dialog**.**
- Select **Entity** as the **Property Type.**
- From the **Entity Property** drop down list, select the CRM field on which to base your first filter condition (e.g., Postcode).



- Next, select and enter the appropriate **Operator and Parameter**, for example, **Operator: "Starts With" and Parameter: "SW".**
- The **Condition Name** field shows the criteria set: SW. Clicking the **Edit** button, you can change the condition name, for example to *Postcode SW*.
- Click the **Create Condition** button to save the condition or **Cancel** the action**.**



- Create any further conditions as required following the above steps.

Defining Conditions based on Queue State.

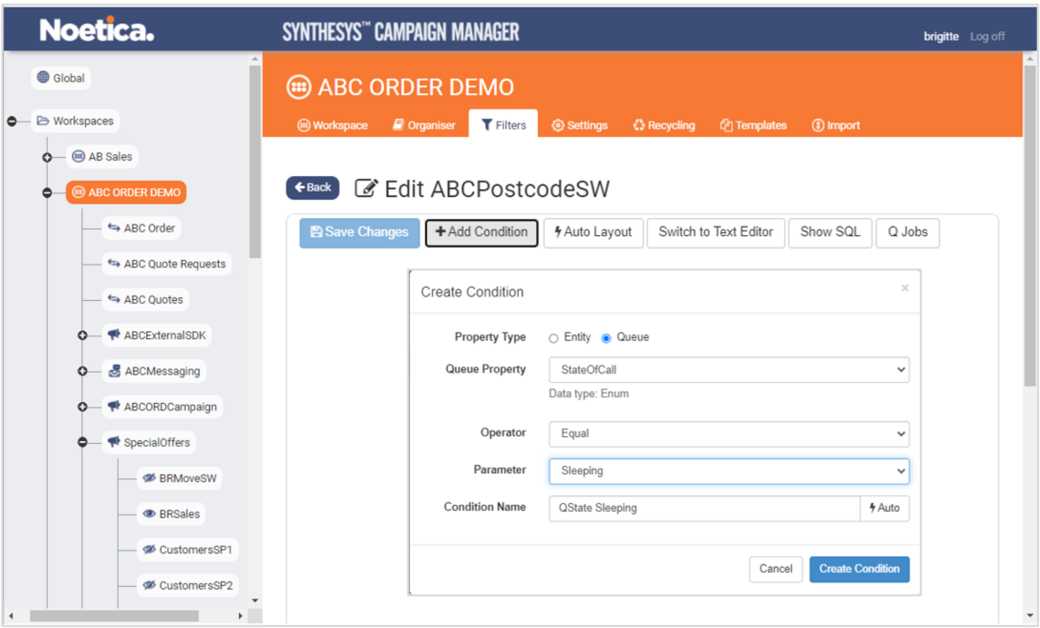
If you are creating a Filter to be used in Bulk Queue Change to help managing outbound call lists, conditions can be based both, on **Entity** data and/ or the **Queue** state of a record.

Using **Queue** as property type, filter conditions can be based on the following queue states.

Queue State	Filter Condition based on
Agent Assigned	True/ False. To specify if the call is assigned to an agent or not.
Retry Time	Date/ Time. To specify the date / time the call is due to be called.
State of Call	Current call outcomes, i.e., if the current call state is either Done, Queued, Scheduled, Attention, Never Call, Sleeping, Wrong Number, Unobtainable, Recycling Complete, Priority Call or Moved.
Times Called	The number of times a record has been dialled.

To define filter conditions based on the Queue state:

- In the **Filter Designer**, click +**Add Condition.**
- In the **Create Condition** dialog, select **Queue** as the Property Type.
- From the **Queue Property** drop down list, select the field on which to base your first filter condition, e.g., StateOfCall.
- Next, select and enter the appropriate **Operator and Parameter**, e.g., **Operator: "Equal" and Parameter: "Sleeping".**



- The **Condition Name** field shows the criteria set: State=Sleeping. Clicking the **Edit** button, you can change the condition name.
- Click the **Create Condition** button to save the condition or **Cancel** the action**.**
- Create any further conditions as required following the above steps.

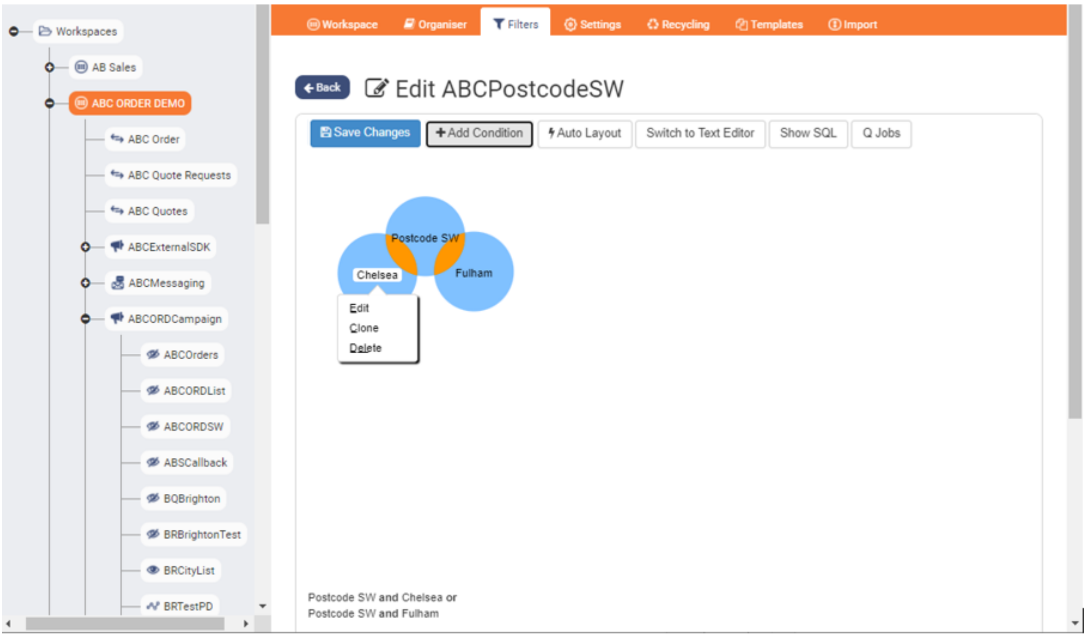
*If you add a condition based on a **Queue property type** to a filter that is being used for queuing data to call lists, the **QJob** button will blink red on saving, to alert you that the job will fail. Clicking on the **Show SQL** tab you can view the queuing jobs applied.*

Viewing Conditions Created

After clicking the **Create Condition** button, the condition(s) defined will appear as free, floating discs in the Filter Designer. Condition discs created can be displayed in auto layout or via the text editor.

Each condition disc can be manipulated clicking and dragging it around the design area. 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 called if:

Postcode SW AND Chelsea, OR Postcode SW AND Fulham.



Editing, Cloning or Deleting Conditions

To edit, clone, or delete a condition created:

- Select the name on the condition disc and then either **Edit, Clone** or **Delete.**
- When selecting **Edit** or **Clone,** the ***Edit Condition*** dialog will open, where you can make your changes, as required.
- Click the **Save Condition** button, to save the updated condition, or **Cancel** the action.
- Select **Delete**, to delete the selected condition disc.

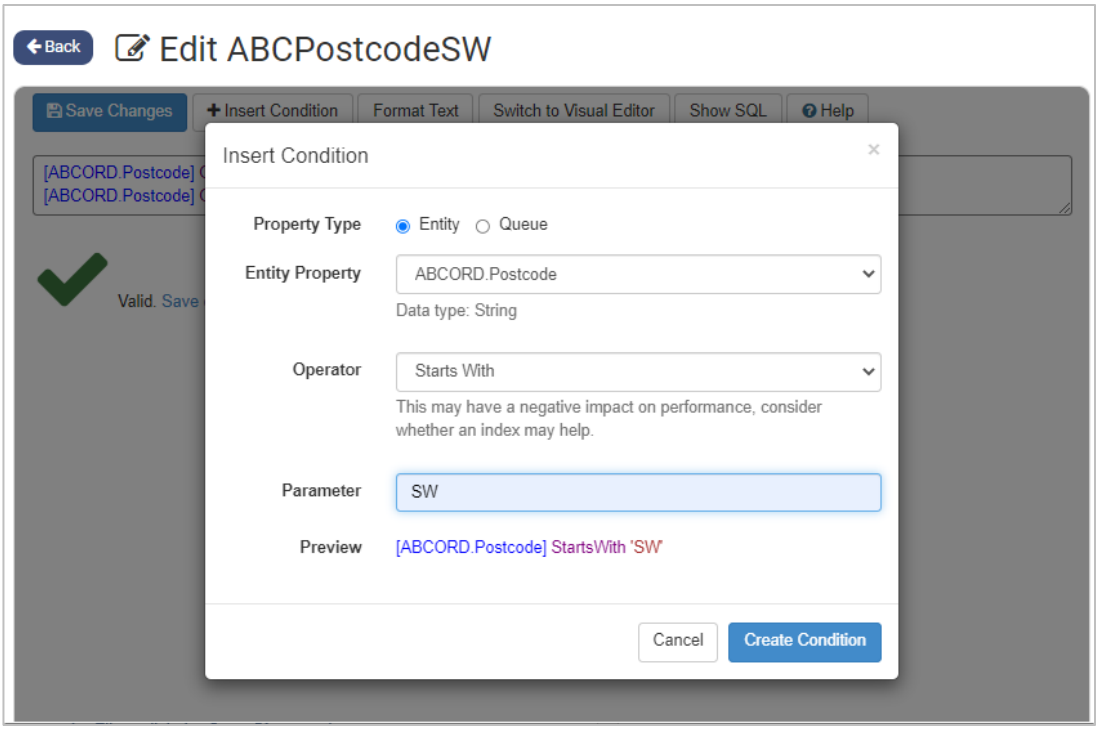
To save all conditions and to create the Filter, click the **Save Changes** button.

For more information about saving filters, please see page 35.

Specifying Filter Conditions in the Text Editor

If you prefer, you can also create the conditions for your filter in the Text Editor.

- In the Filter Designer, select **Switch to Text Editor.**
- Click the **Insert Condition** button, to open the ***Create Condition*** dialog.
- Define your condition and click the **Create Condition** button to save the criteria for the current condition.



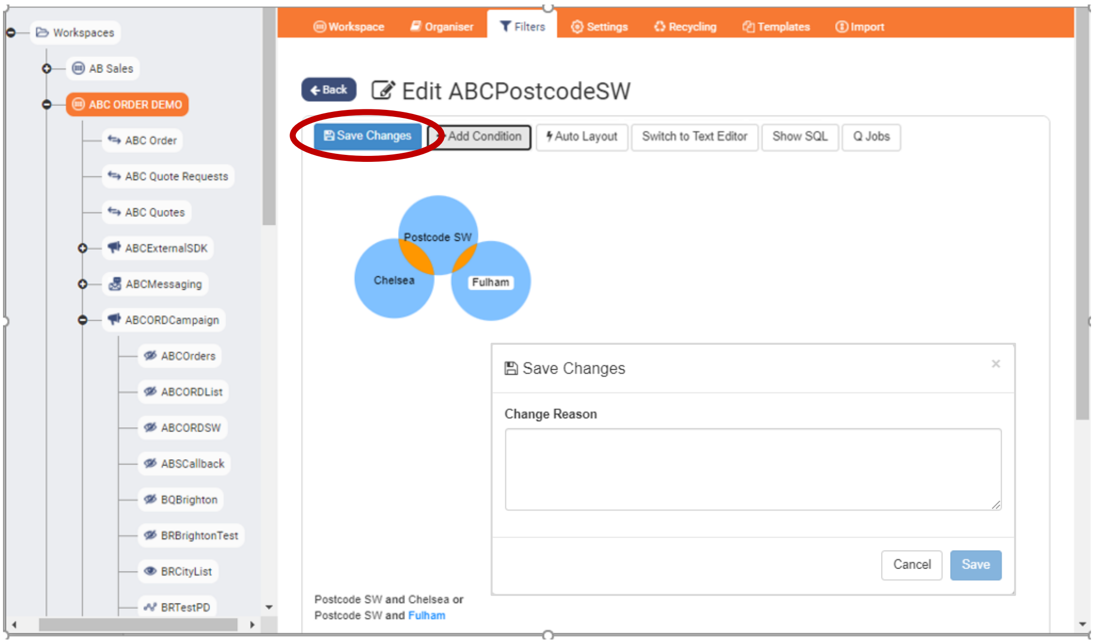
If you create or edit your conditions in the Text Editor, without going through the Insert condition dialog.

- Remember to click the **Format Text** button, before clicking **Save Changes**, to save your conditions.

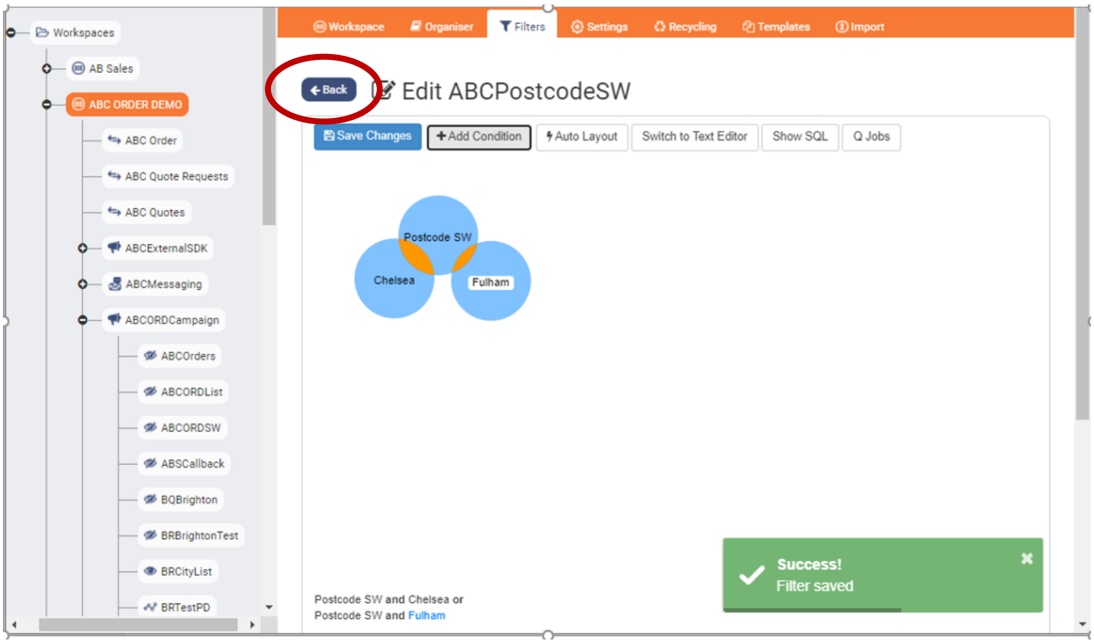
Saving Filters

To save all filter conditions created for the selected filter:

- Click the **Save Changes** button at the top left of the Filter Designer dialog.



- Add a logical comment for saving the condition changes into the **Change Reason** dialog, then click the **Save** button.
- A message: '***Success! Filter saved*** will appear at the bottom right of the dialog, confirming that the filter has been saved.



- Click the **<-Back** button next to the Filter name, to return to the **Filters** dialog, where the new filter name will be displayed.

Defining Filters for linked Entities

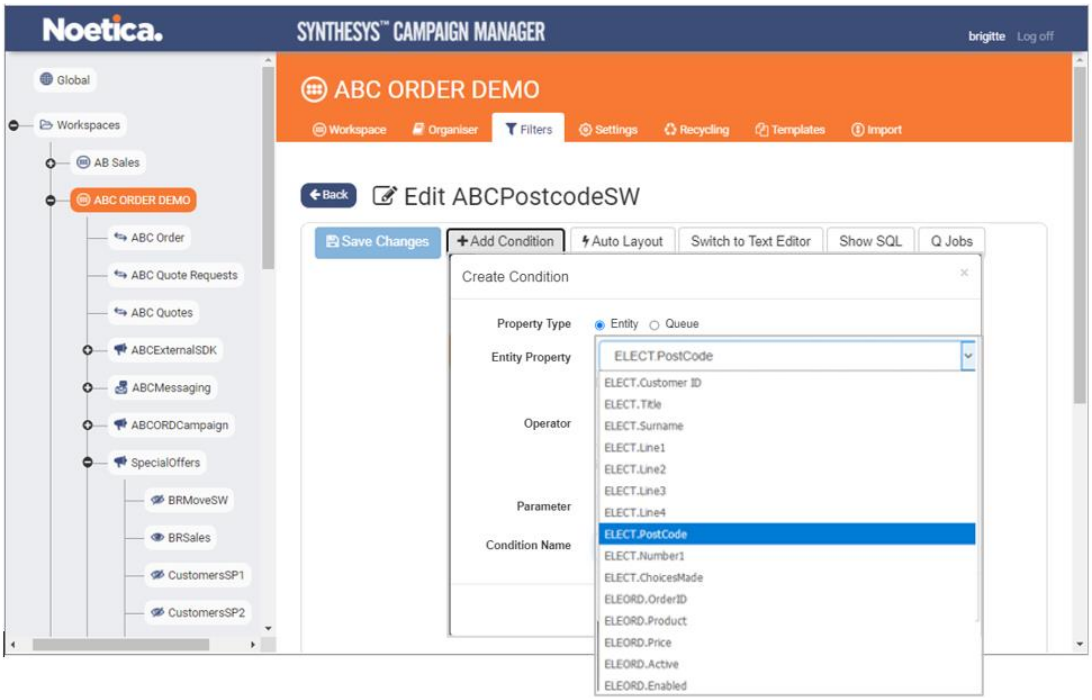
When creating filters, you can access data across several Entity tables. Links between Entities, for example a Sub (child) Entity and a Primary Entity can be defined in the Relations section of the Entity Designer in the Synthesys™ Interaction Studio.

The filter in our example is based on two Entity tables. The first table ELECT contains customer details, the second ELEORD information related to product purchases.

- Go to **Filters** at workspace level, click the **+New** button and create a new filter, entering a logical name.
- In the Filter Designer now displayed, click the **Add Condition button.**
- Select **Entity** as the **Property Type.**

Opening the **Entity Property** drop down list, all entity fields available for the selected workspace are displayed.

This list may simply contain the fields from your primary entity associated with the workspace or, as in our example, also the fields from any linked entities.



Please see the next page for more information.

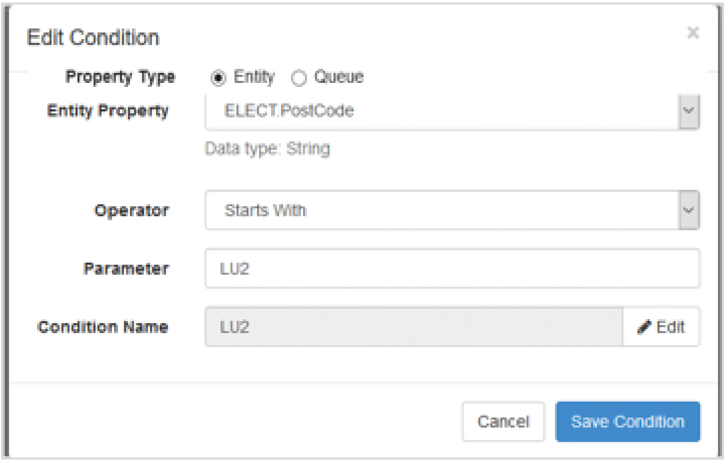
Specifying Filter Conditions

Using linked Entities, you can create a filter defining conditions based on data from both, the Primary Entity customer table (ELECT) and the Sub Entity order table (ELEORD).

This way you can, for example, identify all customers in a selected location (i.e., postcode LU2) who have purchased a certain product (tablet).

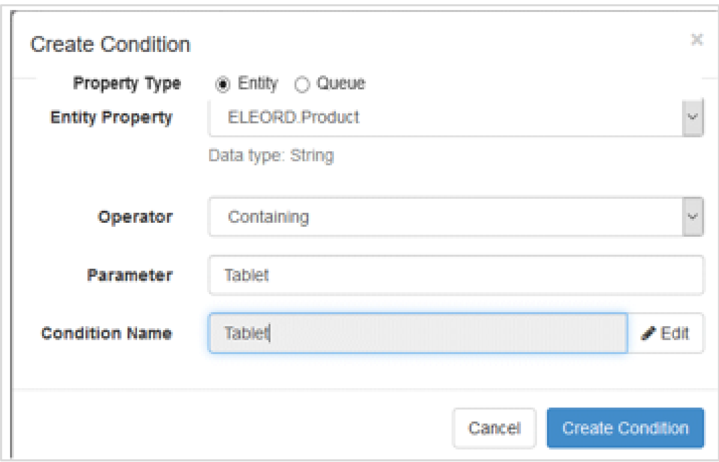
Customer Entity: Postcode

- To specify the location, select the Postcode field from the ELECT customer table in the **Entity Property** list.
- Next, define the appropriate **Operator and Parameter**, e.g., **Operator: “Starts With” and Parameter: “LU2”.**
- Click the **Create Condition** button to save the condition**.**



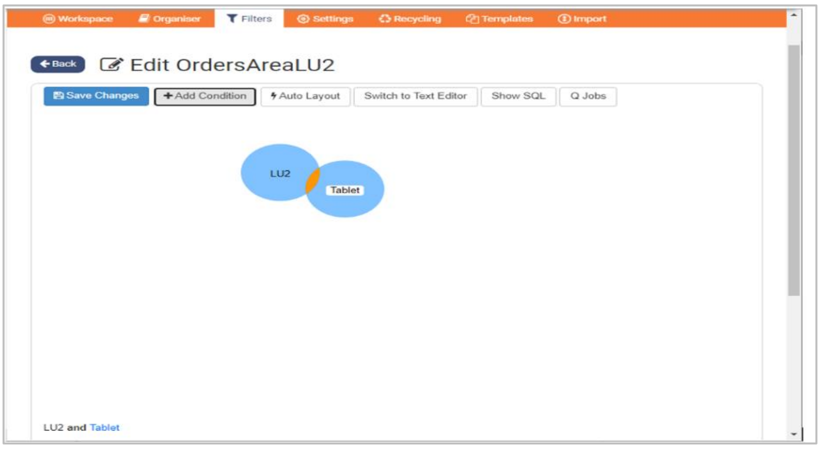
Order Entity: Product

- To identify the product, select the Product field from your ELEORD product table in the **Entity Property** list.
- Next, define the appropriate **Operator and Parameter**, e.g., **Operator: “Containing” and Parameter: “Tablet”.**
- Click the **Create Condition** button to save the condition**.**

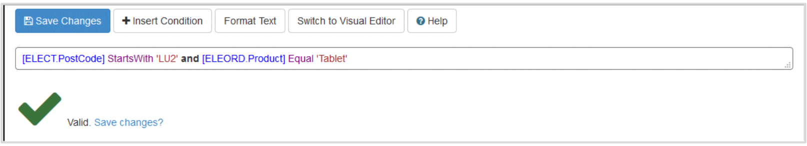


Viewing Conditions Created

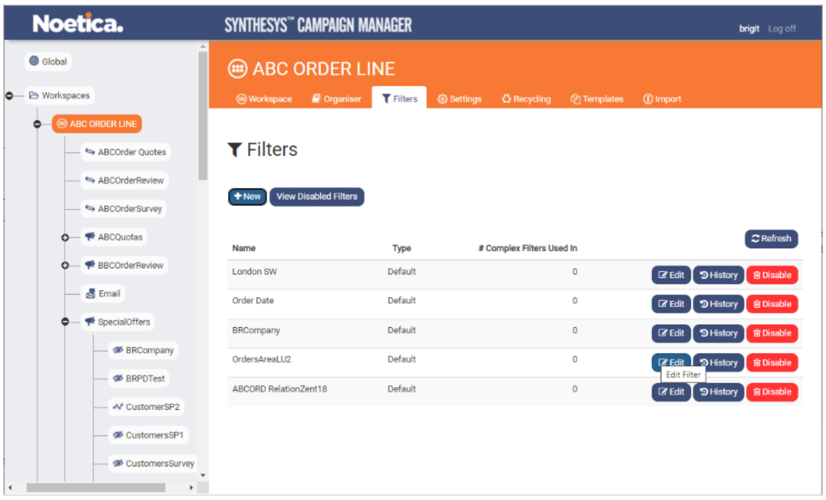
The condition(s) defined will appear as free, floating discs in the Filter Designer.



Clicking **Switch to Text Editor**, you can display and edit conditions in the text editor.

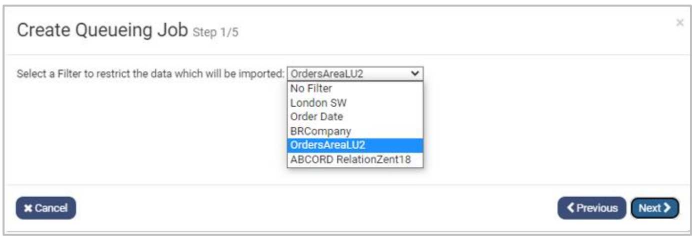


Click the **Save Changes** button, to save all conditions and to create your Filter.



Queueing Job applying a Filter.

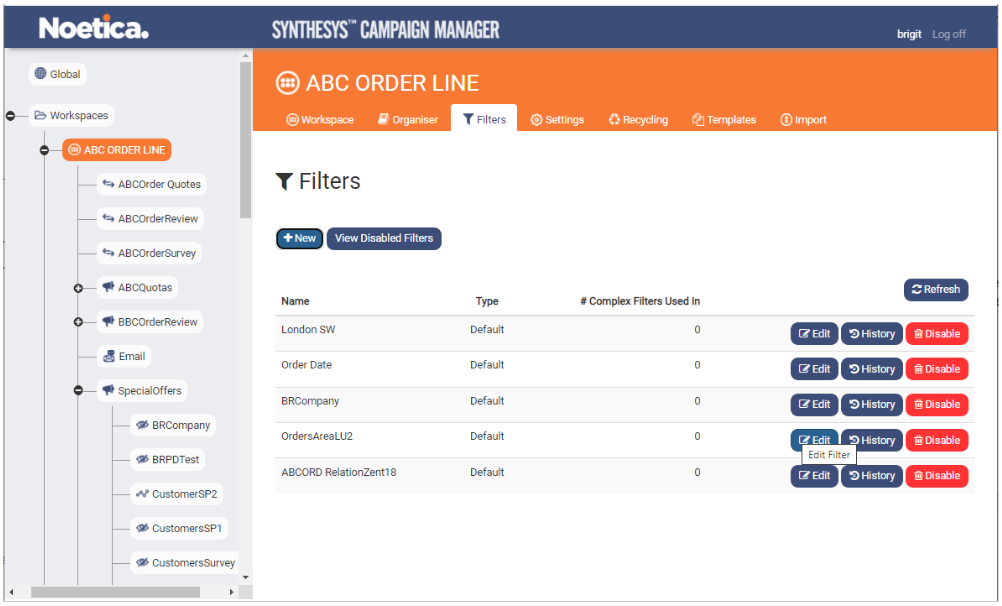
As part of your Queueing Job (created at campaign level), you can now select your filter to ensure that only customers with the matching criteria will be placed into the relevant call list (i.e., customers living in LU2 that have purchased a tablet).



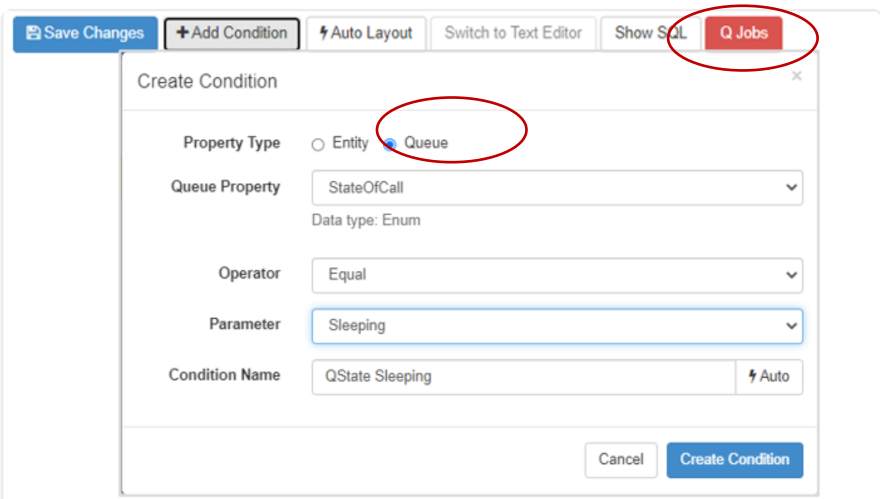
Editing existing Filters

To view or edit existing filters and the associated filter conditions:

- At Workspace level, select the **Filters** tab to show the list of existing filters.



- Click the **Edit** button, to open the Filter Designer.
- Click your left mouse button on the name of the condition disc that you wish to edit and select **Edit** from the list displayed.
- Make your changes in the *Edit Condition* dialog, as required, and then click the **Save Condition** button, to save the changes.
- Repeat the steps to update any further filter conditions, as required.

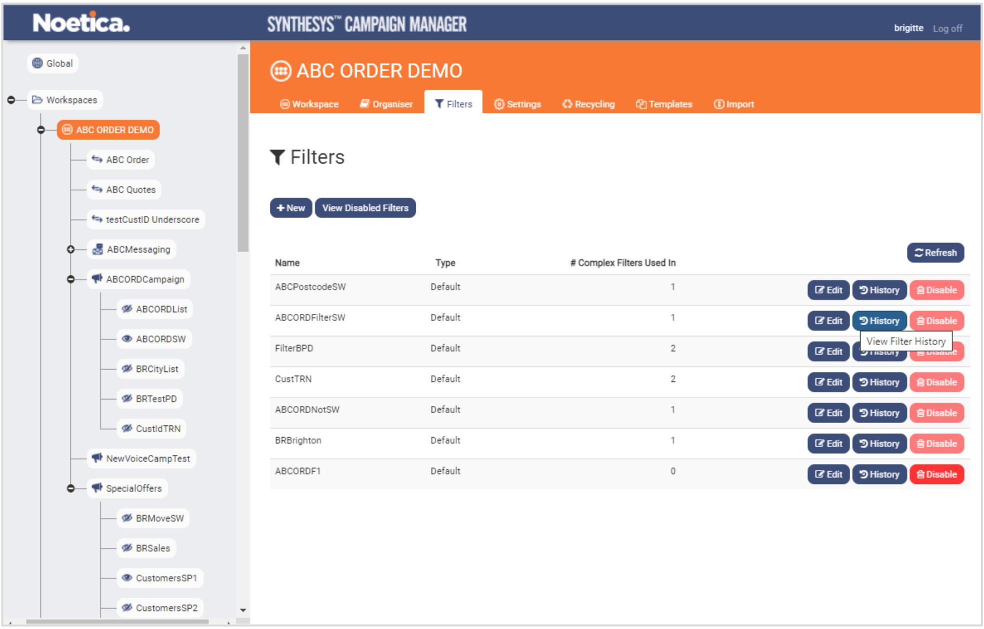


- If you add a **Queue property type** condition to a filter that is being used for queuing data to call lists, the **QJob** button will blink red on saving, to notify you that the job will fail. Click on the **Show SQL** tab, to view the queuing jobs applied.
- Click the **Save Changes** button at the top left of the Filter Designer and enter a brief reason for saving the changes.
- Click **Save, and** the **<-Back** button, to return to the list of enabled filters.

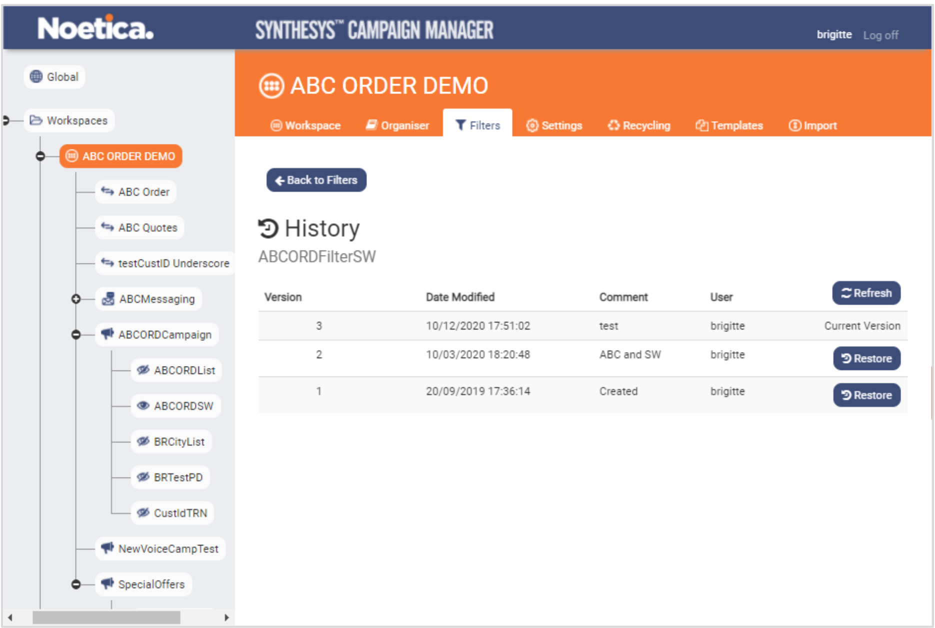
Viewing Filter History

To view the history of an existing filter

- Go to the workspace that holds the filter that you wish to view.
- Select the **Filters** tab at the top right of the screen, to show the available filters.
- Click the **History** button, to open the History dialog for the selected filter.



- View the details associated with the filter selected.
- To reinstate a previous version of the filter, click the **Restore** button.

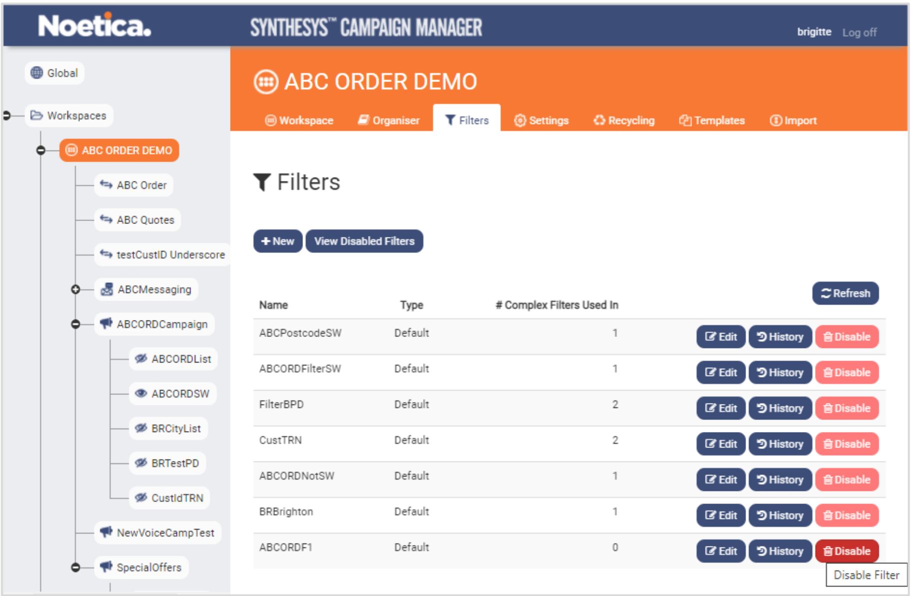


- To return to the list of enabled filters, click the **<-Back to Enabled Filters** button.

Disabling Filters

To disable a filter not currently in use

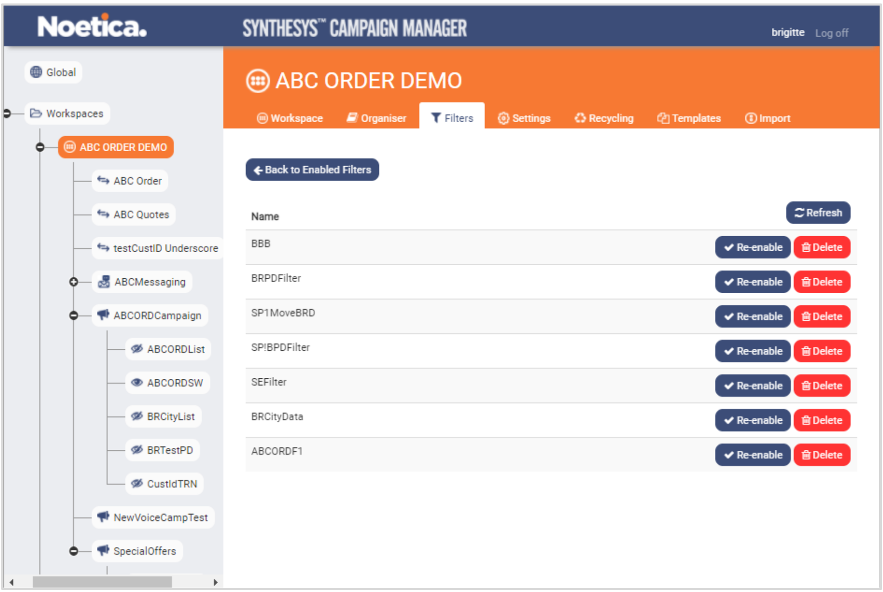
- Go to the workspace that contains the filter that you wish to disable.
- Select the **Filters** tab at the top right of the screen, to show the available filters.
- Click the **Disable** button, to remove the selected filter from the enabled filters list.



- To view disabled filters, click the **View Disabled Filters** button under the Filters heading in the Filters screen.

Re-enabling or deleting Filters.

- To re-activate a selected disabled filter, click the **Re-enable** button.
- To delete a selected disabled filter not currently in use, click the **Delete** button.



- To return to the list of enabled filters, click the **<-Back to Enabled Filters** button.

LIST ORGANISER

Using the List Organiser, you can create complex filters by combining existing simple filters and assign these to a selected workspace (account/ CRM Entity), campaign or outbound list, to determine dialling priorities for call lists.

Complex filters can be applied instantly, or they can be saved for later reuse.

- Select the workspace, campaign, or outbound list for which you want to assign the filter in the tree structure on the left of the Synthesys™ Campaign Manager screen.
- Click the **Organiser** tab, to open the List Organiser.

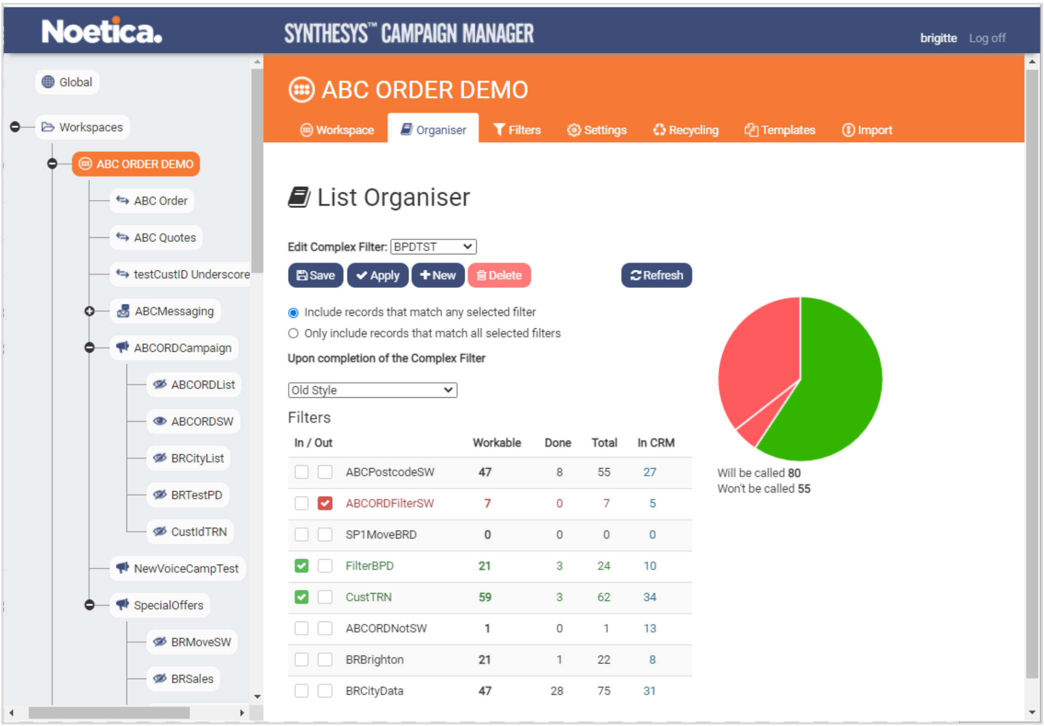


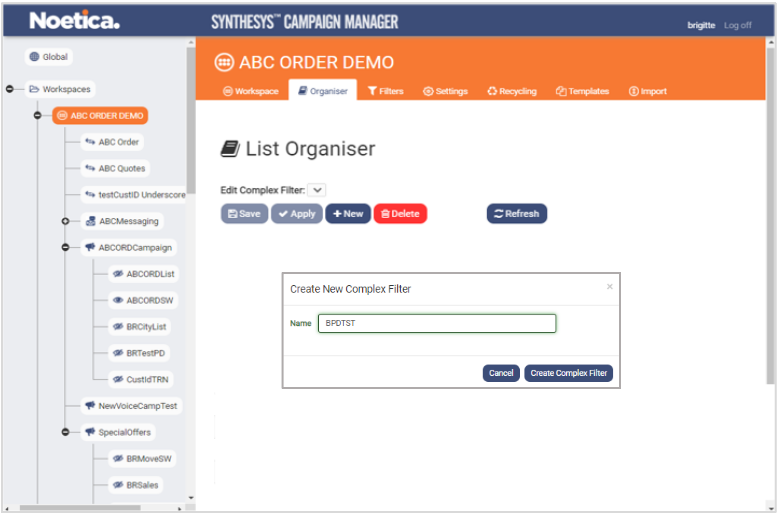
Table Column	Description
In/ Out	Tick boxes to include (In) or specifically exclude (Out) a filter and matching data segments
Workable	Shows the number of sleeping and queued records in the list available for dialling
Done	Shows the number of exhausted/ completed records
Total	Shows the combined number of workable and done records
In CRM	The total number of records in the CRM entity that match the filter conditions

To create new filters, go to the Filters tab at Workspace level, and define the conditions for your filter(s), as required, in the Filter Designer.

Creating and applying complex Filters

Creating a complex filter, you can display and combine existing simple filters:

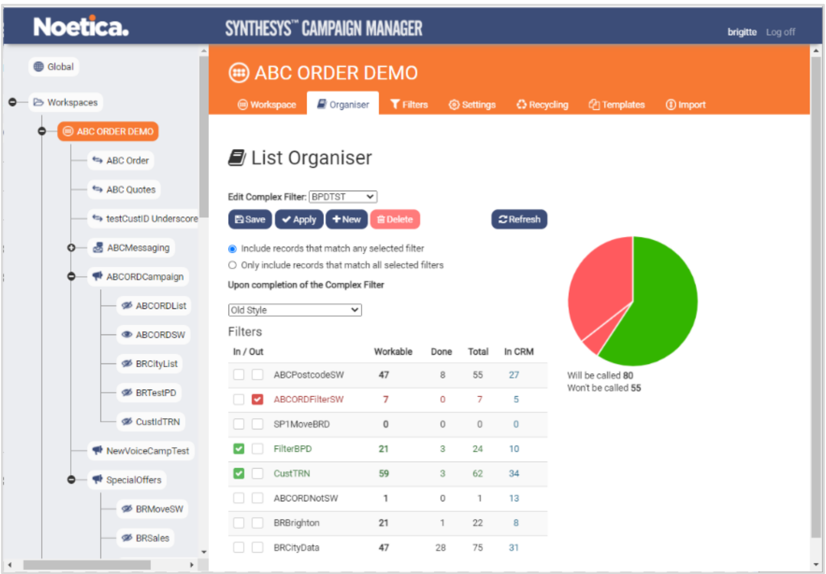
- Click the **+New** button to open the *Create New Complex Filter* dialog.
- Enter a logical/ descriptive name for the filter into the **Name** field.
- Click **Create Complex Filter,** to show the simple filters available for the workspace**.**



Next, select the simple filters that should form part of your new complex filter.

- Tick the **In** checkbox, to include the matching CRM data segments for dialling.
- Tick the **Out** checkbox**,** to categorically exclude a filter and matching CRM data segments from being dialled, even if some of the data items in the segment are included for dialling under another 'Active' filter.
- Click the **Apply** button to apply the filter to the selected workspace (CRM entity), campaign or outbound list. Both the table and pie chart will update automatically.

Green= shows the included/ active records; Red= the inactive/ actively excluded records; Blue= shows the CRM records that match the filter conditions, and Black shows that no filter is in use.

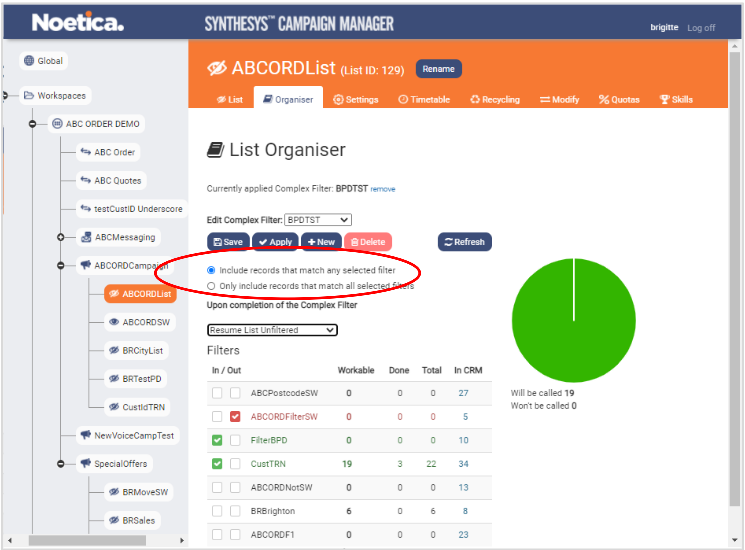


If the list is in progress, you can click the Refresh button at any time, to recalculate all numbers in the table, and to re-draw the pie chart.

Managing complex Filters

When assigning a complex filter at workspace, campaign, or list level, you can decide to

- Include records that match any selected filter.
- Only include records that match all selected filters.

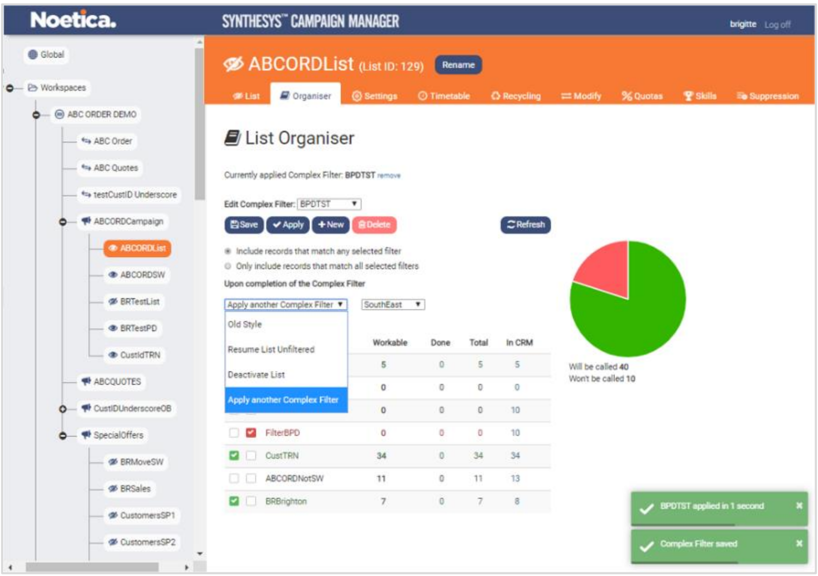


Using the **Upon completion of the current Complex Filter** drop-down menu, you can choose the action that should be taken when the data of the currently applied complex filter has been exhausted.

- Resume List Unfiltered
- Deactivate the list.
- Apply another Complex Filter.

If **Apply another Complex Filter** is selected, pick the filter to be applied from the associated drop-down list.

When the number of workable records becomes lower than the number of agents assigned to the list/ filter, agents, as they complete their calls, will be released to the next priority list or filter chained to the current one.



- When applying or changing the filter selected, remember to click the **Apply** and **Save** buttons, to save your changes.

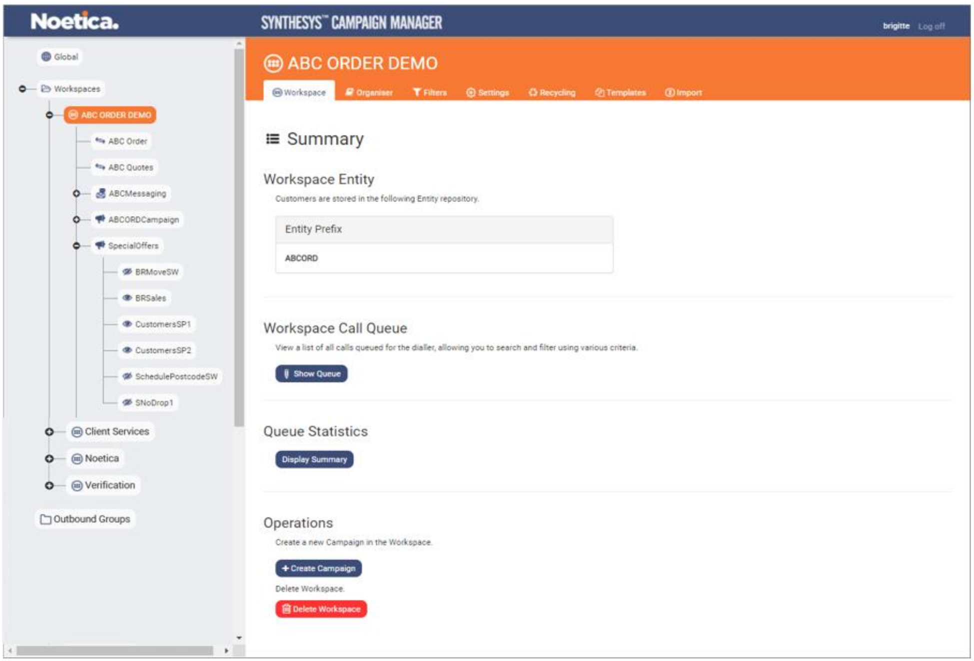
When changing a complex filter at list level, click the **remove** option, to remove the filter currently assigned to the list, before applying a different filter.

DELETING WORKSPACES

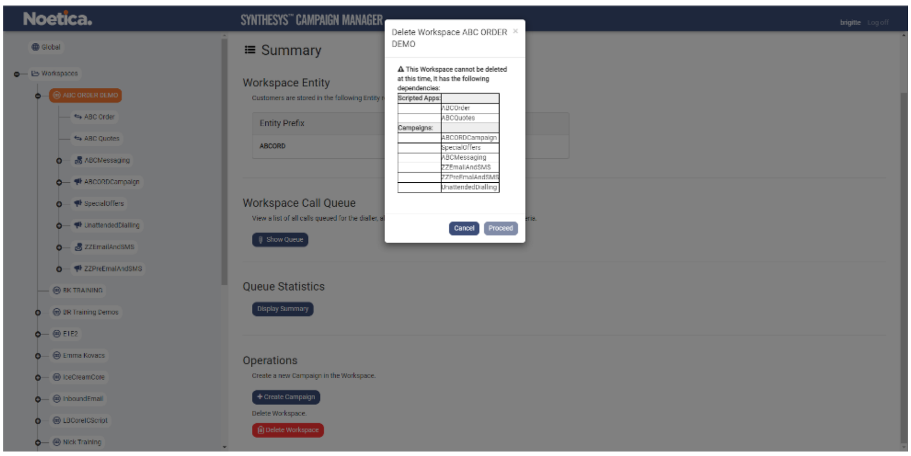
At workspace level in the Campaign Manager, it is possible to delete an entire workspace, providing that you first remove any dependent objects connected with the workspace, thus deleting all call lists and associated queuing and bulk queue change schedules, any campaigns created under the workspace and any scripted apps assigned.

Having cleared the workspace from all the above mentioned dependents

- Select the workspace that you wish to delete.
- Click the **Delete Workspace** button in the Operations section.



- If there are still any campaigns and/ or scripted apps associated with the workspace, a message dialog will show a list of the current dependencies, and prompt you to delete these first, before you can delete the selected workspace.



Recycling rules are deleted along with the workspace, so do not need to be cleared separately.

Scripted apps associated with the workspaces will have to be deleted in the Synthesys™ Interaction Studio, via the Remove option.