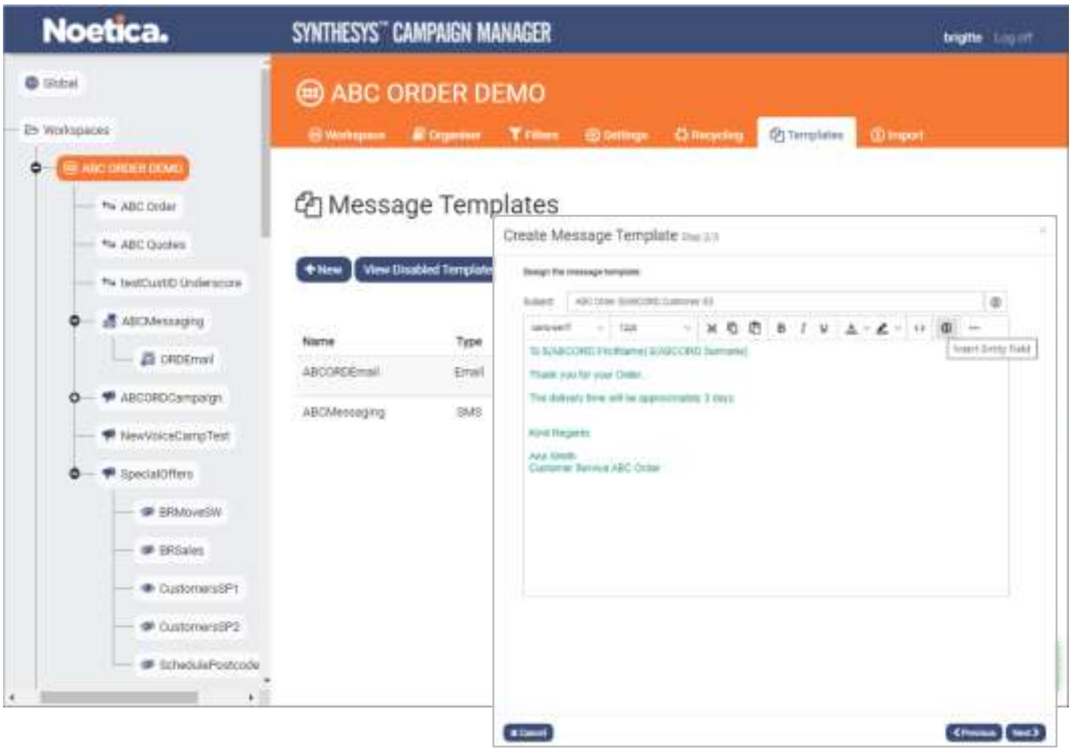
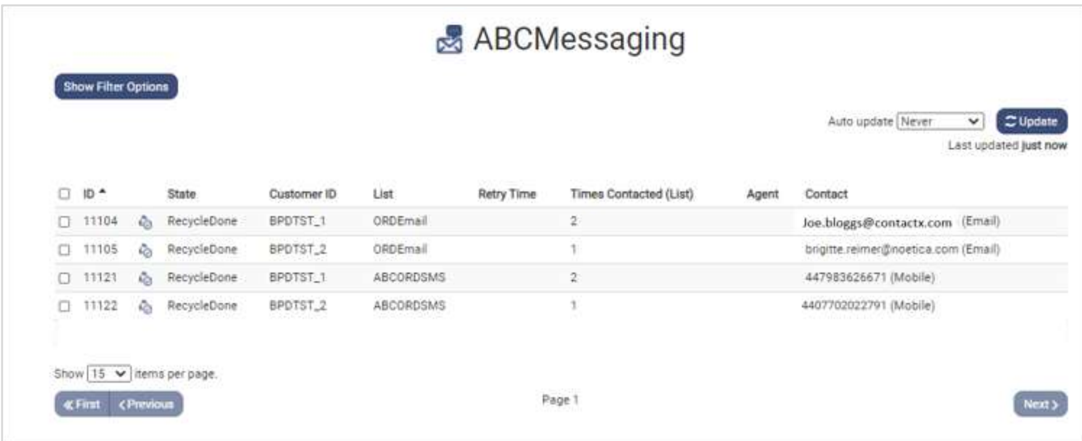
MESSAGING CAMPAIGNS

SMS & Email Message Templates



SMS & Email Outbound Lists



Synthesys™ SMS and Email Outbound Lists

Last updated June 2021

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MESSAGING CAMPAIGNS

Messaging campaigns with SMS and Email lists can form part of a full contact strategy. For example, customers could initially be called on their home, work, and mobile number, then they could be sent an email, followed by a SMS message.

Messaging templates and **Messaging campaigns** are created at Workspace level in the Synthesys™ Campaign Manager.

Introduction to Email and SMS Lists

SMS and **Email lists** are created under the Messaging campaigns, selecting the relevant SMS or Email template. It is also at campaign level that customer records for SMS and Email lists are queued, by creating and running queueing jobs, in the same way as records for outbound call lists are queued.

When setting up SMS and Email outbound lists, you must ensure that the Entity for the selected messaging campaign includes a telephone and/ or email field containing the customer's mobile number or email address.

To help manage your SMS and Email lists in accordance with your requirements and contact strategies, you can define recycling rules to determine when and how to re-present customer records.

Messaging campaigns with SMS and Email lists require integration to 3rd party systems such as email servers and SMS gateways.

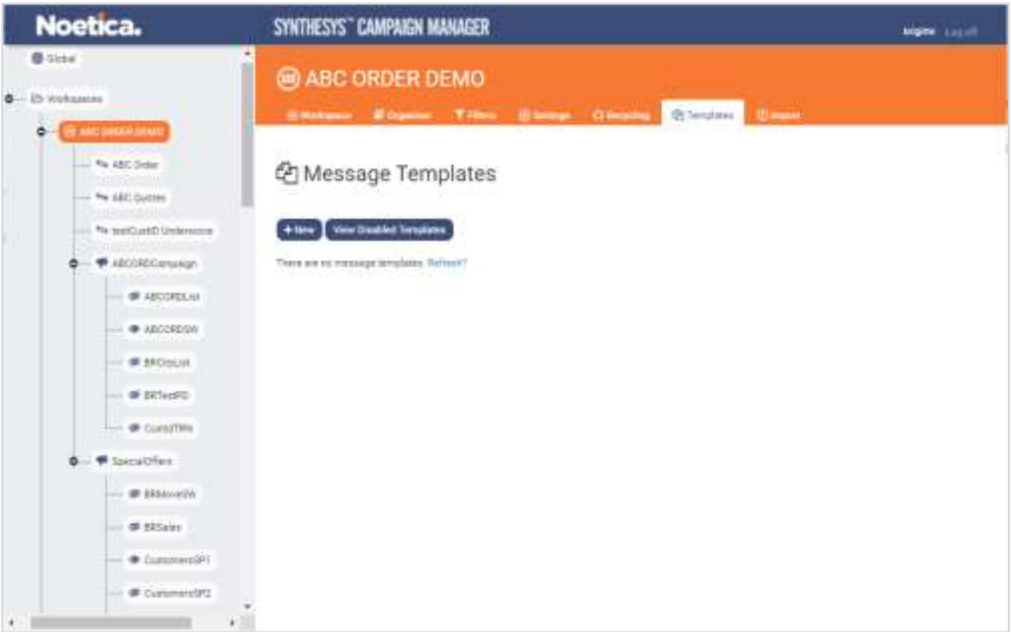
These systems are not supplied by Noetica. Please contact your Noetica representative for more information.

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.

Creating Message Templates

The Templates for SMS and Email messages are created at Workspace level in the Campaign Manager.

- Select the workspace for which you want to create the message template.



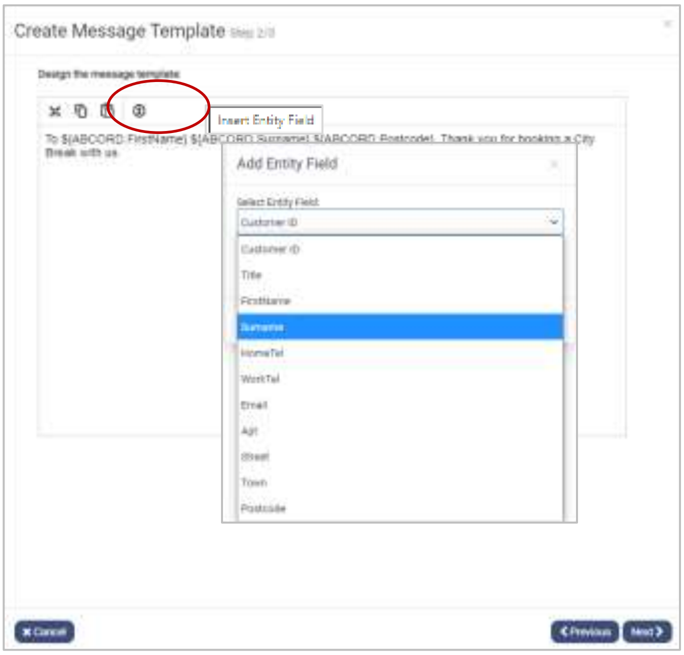
- Click the **+New** button to open the **Create Message Templates** dialog.
- Enter a descriptive name for the template into the **Template Name** field.
- Next, select the message type, either **SMS** or **Email.**

- Click **Next>,** to move to the next page of the Message Template wizard.

SMS Message Templates

To create a template for a SMS message

- Enter the details of your message into the message text box.
- To add data from your Entity as part of the message, click the **Insert Entity field** icon, and from the **Add Entity Field** drop-down menu, select the required Entity details, for example a customer name or an order number.

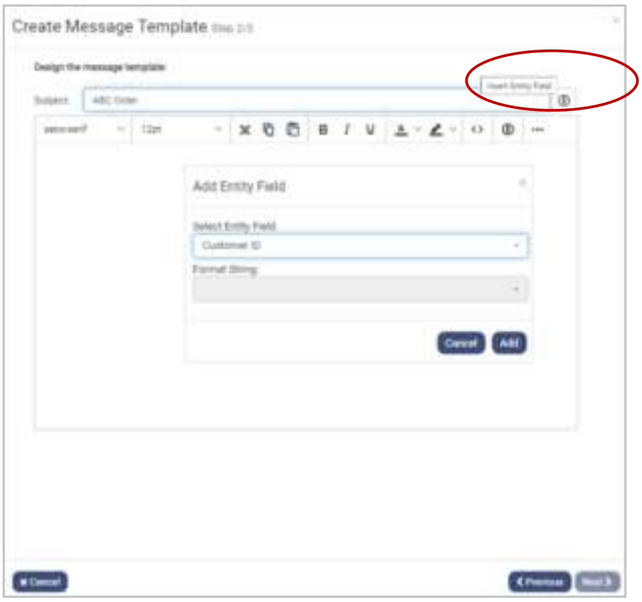


- When you have completed your message, move to the **Next>** page.
- Enter a logical comment for saving the message template into the **Change Reason** dialog, then click the **Finish** button.

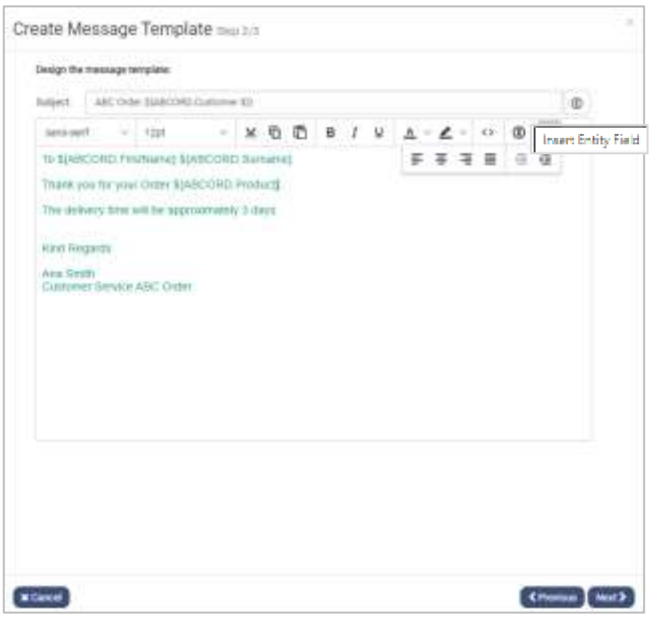
Email Message Templates

To create a template for an Email message

- Enter a logical title for your Email template into the Subject field.
- Click the **Insert Entity filed** icon on the right of the Subject field, to add data from your Entity as part of your subject title, for example the customer id, or an order date.



- Next, enter your email message. Using the formatting toolbar, you can edit selected text, changing font, style, and size, adding colour, and setting text alignment.
- Click **Insert Entity filed** at the top right of the messaging dialog, to add data from the Entity to the body of your email, for example customer name and order details.



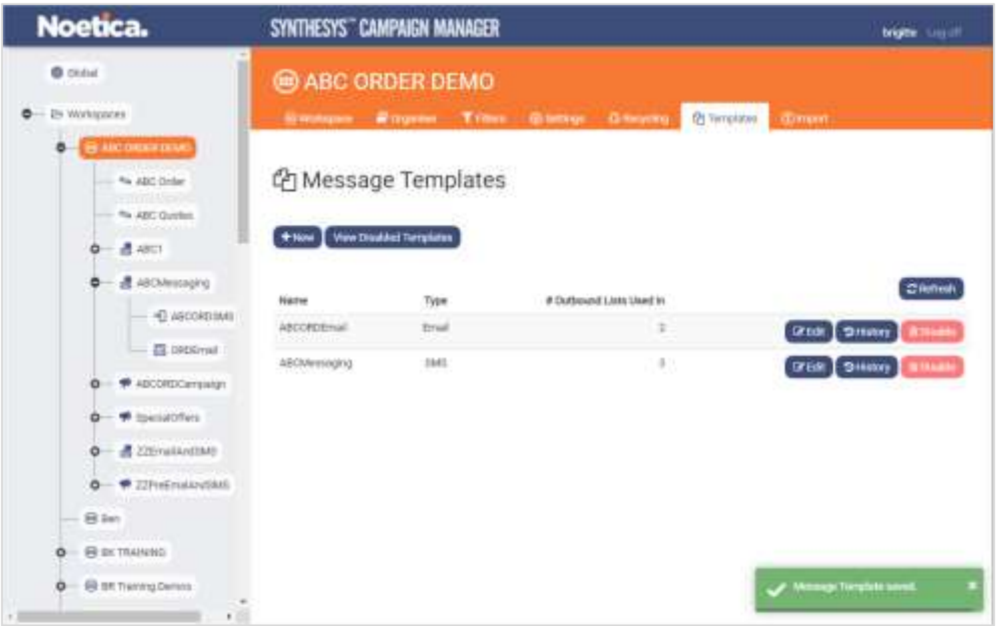
Via the **Source Code <>** icon in the toolbar at the top right of the message page, you can access an HTML editor, for use in composing the email.

Saving Message Templates

Having completed the message design for your SMS or Email, move to the next page, to save the Message template.

- Add a logical comment for saving the template into the **Change Reason** dialog, then click the **Finish** button.

- A note ***Message Template saved*** will appear at the bottom right of the dialog, confirming that the message design has been saved.
- The **Message Templates** dialog shows the name and message type, and the number of lists currently assigned to each SMS and Email template.
- Clicking the **Edi**t button on the right of a template, you can update existing messages.



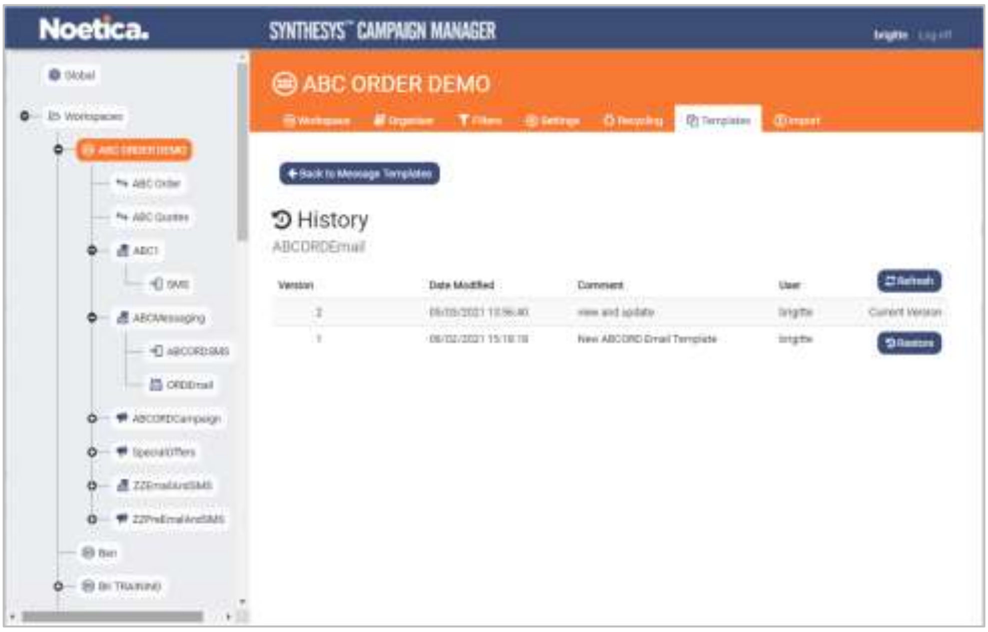
- To view details of a previously saved message template, select the **History** button.
- To disable a message template not currently in use. click the **Disable** button.

Please see next page for more information.

Viewing Message Templates History

Having selected the **History** button in the Message Templates dialog, you can view details of previously saved versions of the selected SMS or Email message template.

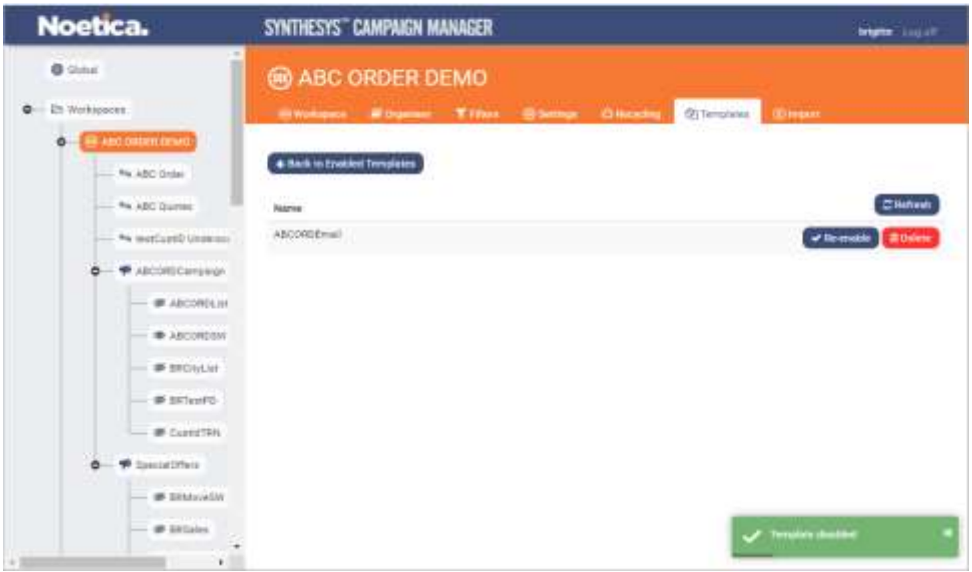
- To return to the list of enabled templates, click on **Back to Message Templates**.



Re-enabling or deleting Message Templates.

Having selected the **View Disabled Templates** button in the Message Templates dialog, you can view and re-enable disabled templates, or delete templates not currently in use:

- Press the **Re-enable** button, to restore a selected disabled template.
- Press the **Delete** button, to delete a selected disabled message template.

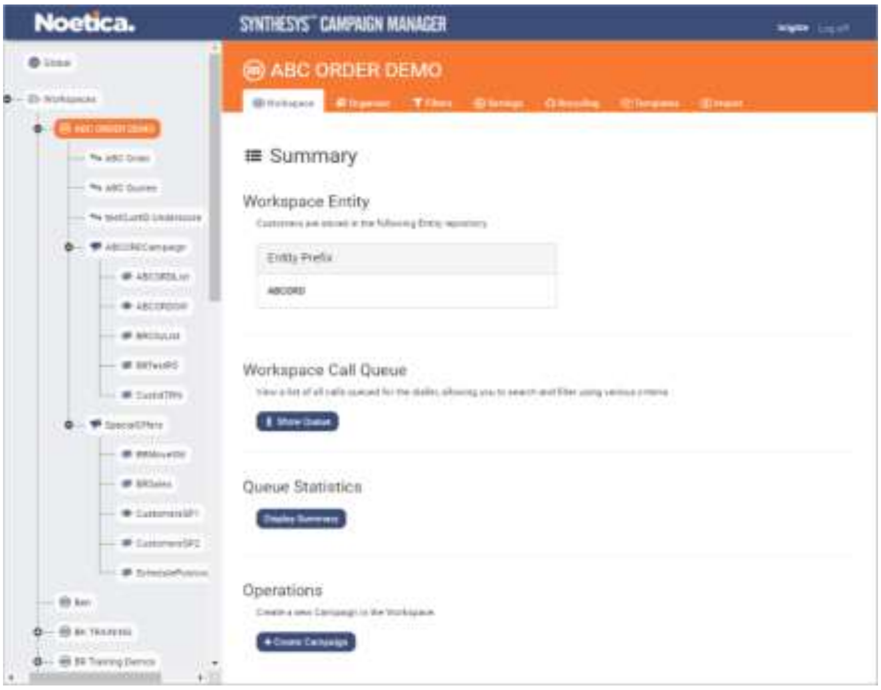


- To return to the list of enabled templates, click on **Back to Enabled Templates**.

Creating Messaging Campaigns

Messaging campaigns can be added to any workspace that has been assigned an Entity containing a telephone or email field with the customer's mobile number or email address.

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



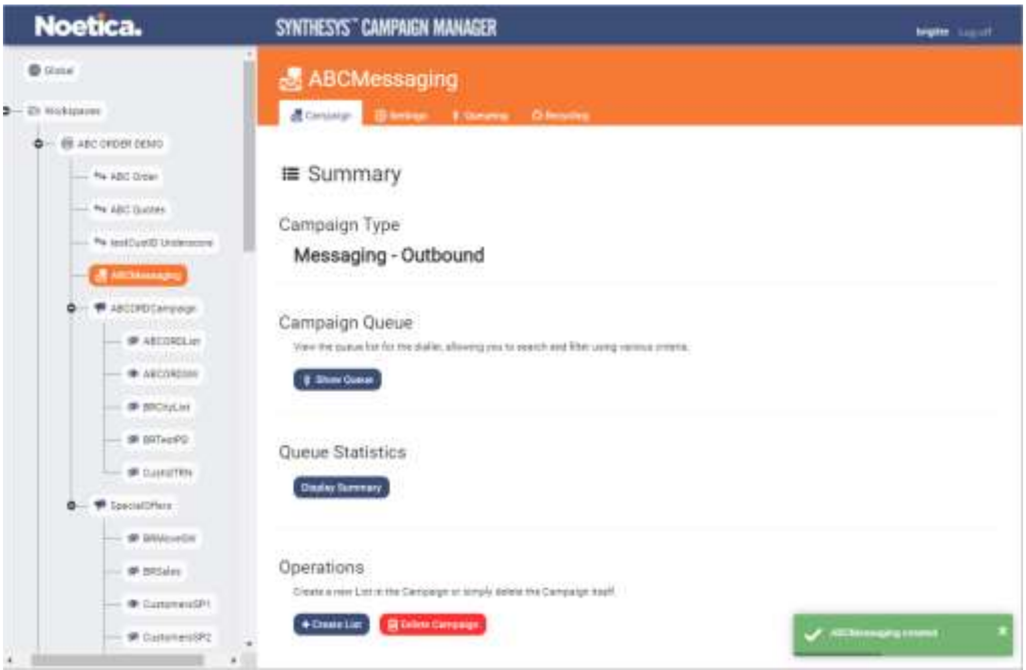
- In the Create New Campaign dialog, select the **Campaign Type**, i.e Messaging.
- Enter a name for the new messaging campaign into the **Name** field.

- Click the **Create Campaign** button, to create the new messaging campaign.
- A message will confirm that the campaign has been created.

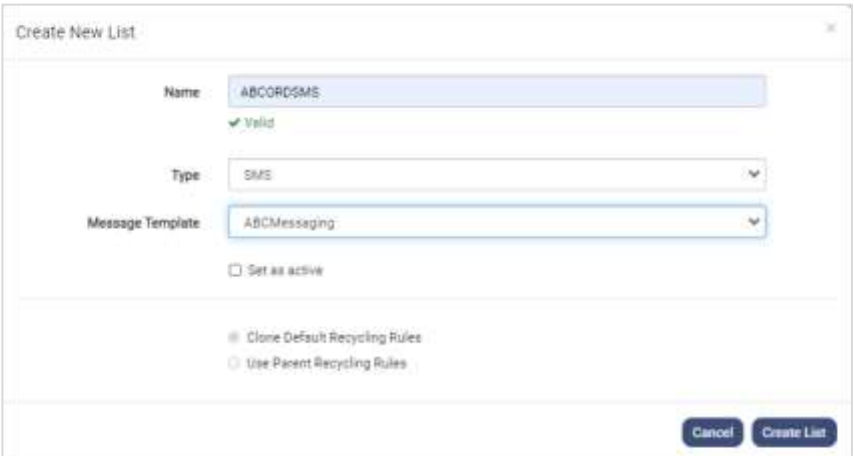
Adding SMS and Email Outbound Lists

To add a SMS or Email outbound list to your messaging campaign:

- Select the Message campaign for which you want to add the SMS or Email list.
- Click the **+Create List** button under the Operations heading.



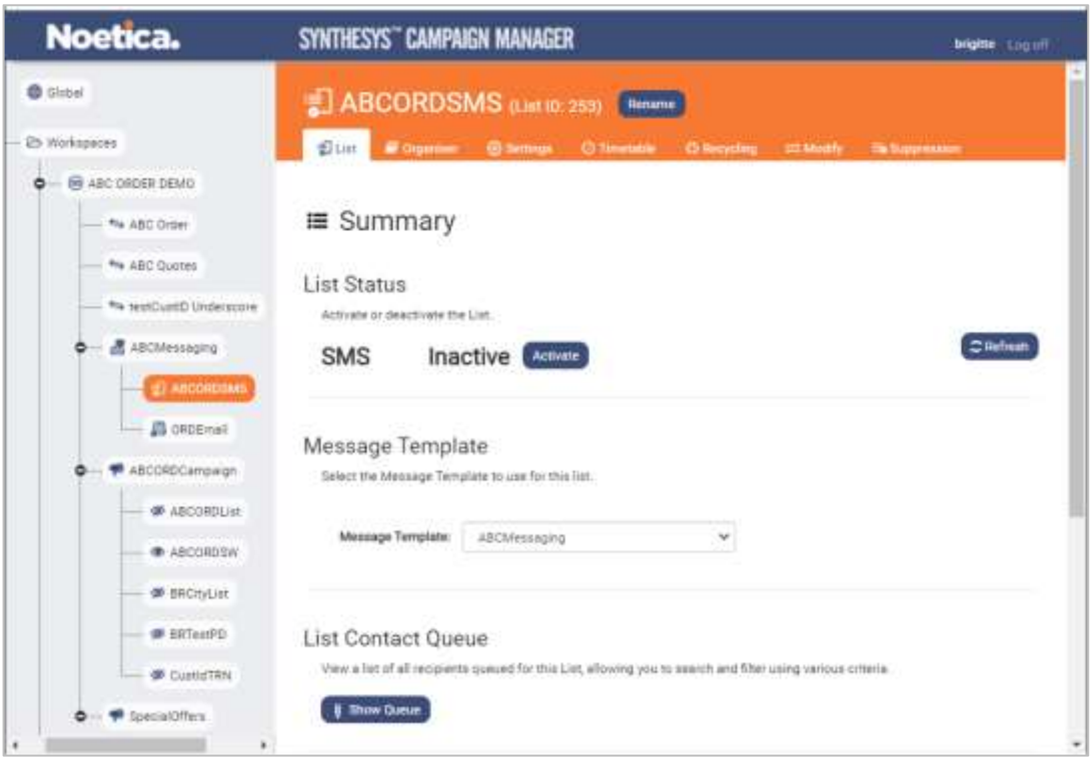
- Enter a name for the message list into the **Name** field of the *Create New List* dialog.
- Select SMS or Email from the **Type** menu, reflecting the type of messaging list that you are creating, and choose the SMS or Email template to be used for the new list.



- To activate the SMS or Email list immediately, tick **Set as active.**
- Next, select **Clone Default Recycling Rules** or choose **Use Parent Recycling Rules,** if available, to use recycling rules created specifically for the selected campaign.
- To create the SMS or Email list, click the **Create List** button, else click **Cancel**.
- A message will confirm that the list has been created.

SMS and Email List View

When selecting an SMS or Email list in the tree structure on the left of the Campaign Manager, the page on the right shows the title for the list, the list ID, and associated information.



Options	Description
Tabs	
Organiser	Allows the creation of complex filters by combining existing simple filters.
Settings	Shows available outbound list properties at campaign and list level.
Timetable	For setting the date and time during which SMS and Emails should be send to customers.
Recycling	Create recycling rules to determine the strategy for contacting customers.
Modify	Allows the instant or scheduled manipulation of queued items for all or a selected SMS or Email list.
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	Shows the type of list (SMS or Email) and list status of Active or Inactive.
Message Template	Shows the Message Template associated with the SMS or Email list.
List Contact Queue	Allows you to view and manipulate records queued for the selected list, using the *Show Queue* button.
Operations	Delete a de-activated SMS or Email list clicking the *Delete List* button.
Queue Statistics	Allows you to view a summary of queue statistics for the selected list, using the *Display Summary* button,

SMS and Email List Settings

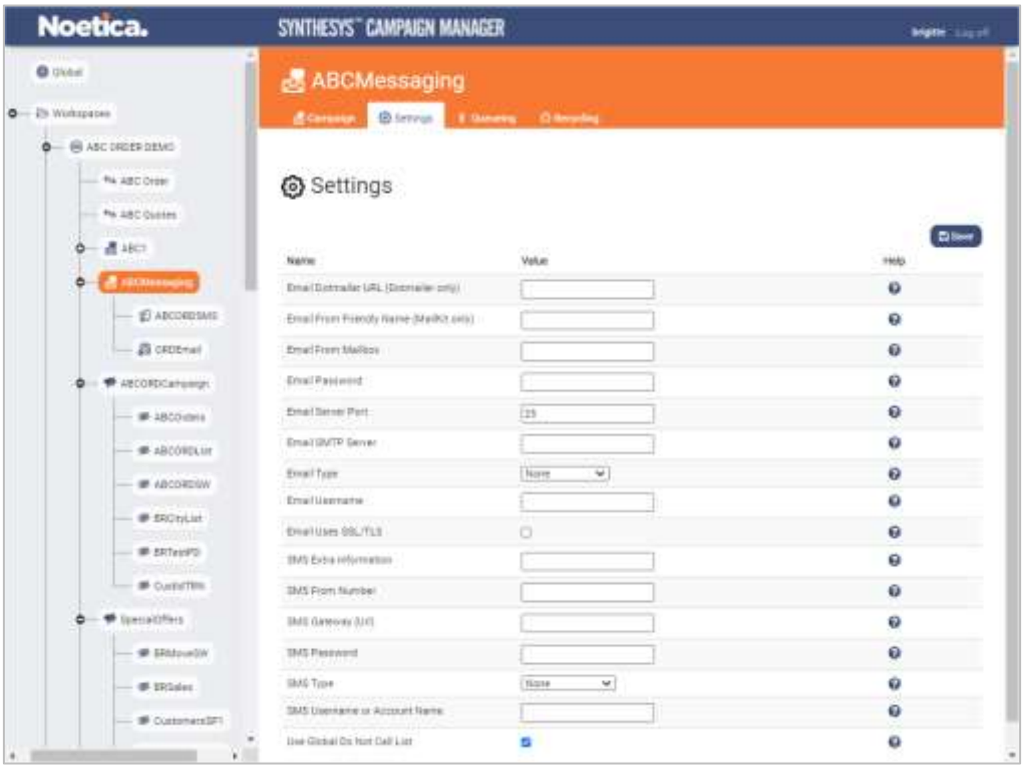
In the **Settings** page, at campaign or list level, you can manage specific SMS and Email list properties, as required.

- Select the messaging campaign, or the SMS or Email list for which you want to view or manage your property settings and click the **Settings** tab at the top right of the dialog.

To view tooltips with a detailed description of the SMS and Email settings available, click the question mark icon next to a property setting.

Email list properties

- Enter the path for the Email From Mailbox, Email Password, Email Server Port, and select the Email Type {Smtp, MailKit (Smtp), Dotmailer}.
- For Dotmailer, also add the “Email Dotmailer URL”, for MailKit the “Email From Friendly Name”.
- If required, also enter the “Email Username”, and tick in the “Email Uses SSL/TLS” checkbox.



SMS list properties

- Enter the SMS From Number and SMS Password, select the SMS Type {e.g., Twilio, 2sms, WinSMS, Nexbridge, etc.) and enter the SMS Username or Account Name.
- If required, also enter the URL for the SMS Gateway.

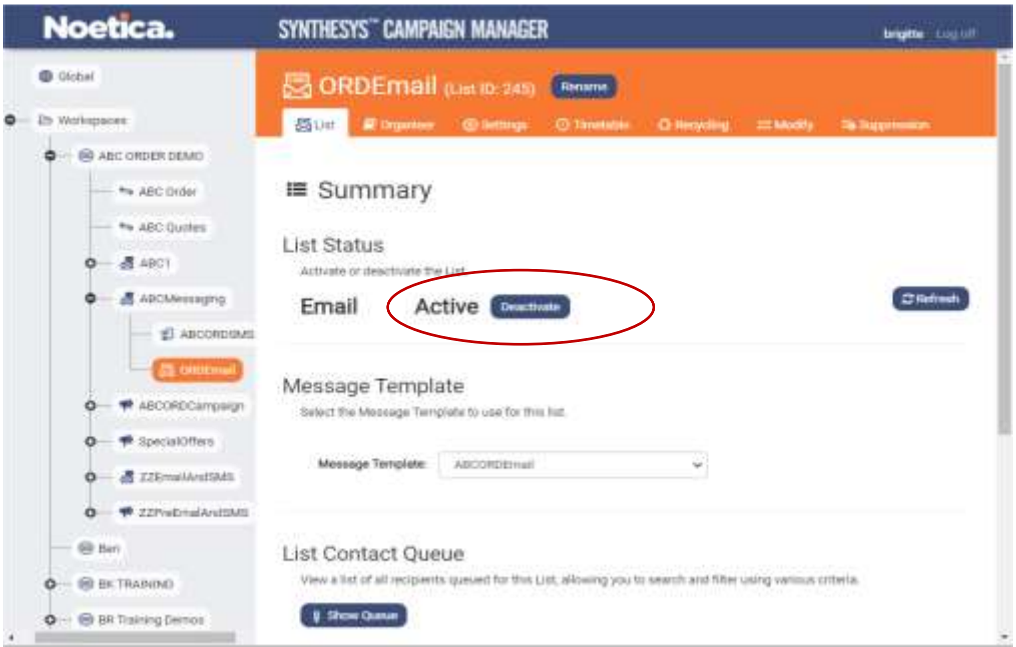
For both SMS and Email lists

- Tick Use Global Do Not call List, to check the Phoenix_DoNotCall table for entries and if found, to recycle these records as DNC, rather than sending the SMS or Email.
- Click the **Save** button at the top right of the Settings dialog, to confirm the settings.

Activating SMS and Email Lists

For messages to be send, SMS and Email lists need to be **Active** and on **Active Times**.

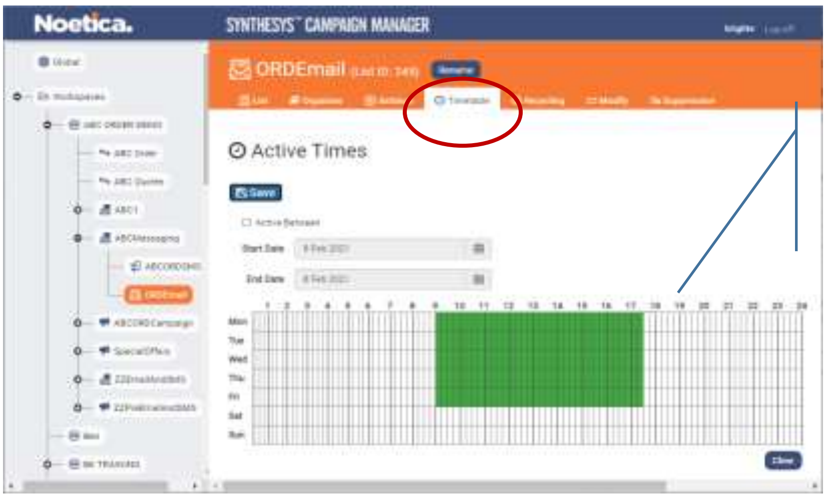
- If the selected SMS or Email list is currently Inactive, click the **Activate** button.
- To de-activate an active list, click the **Deactivate** button.



Setting Active Times

To specify the time periods, or a date and time for sending SMS or Emails:

- Click the **Timetable** tab at the top right of the SMS or Email list dialog.
- To **activate** the desired time slot, move your mouse pointer to the required time cell and drag the pointer from left to right. To **de-select active times**, move your mouse pointer to the activated time cell and drag the pointer from left to right, or click the **Clear** button at the bottom right, to clear all active time settings.



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

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

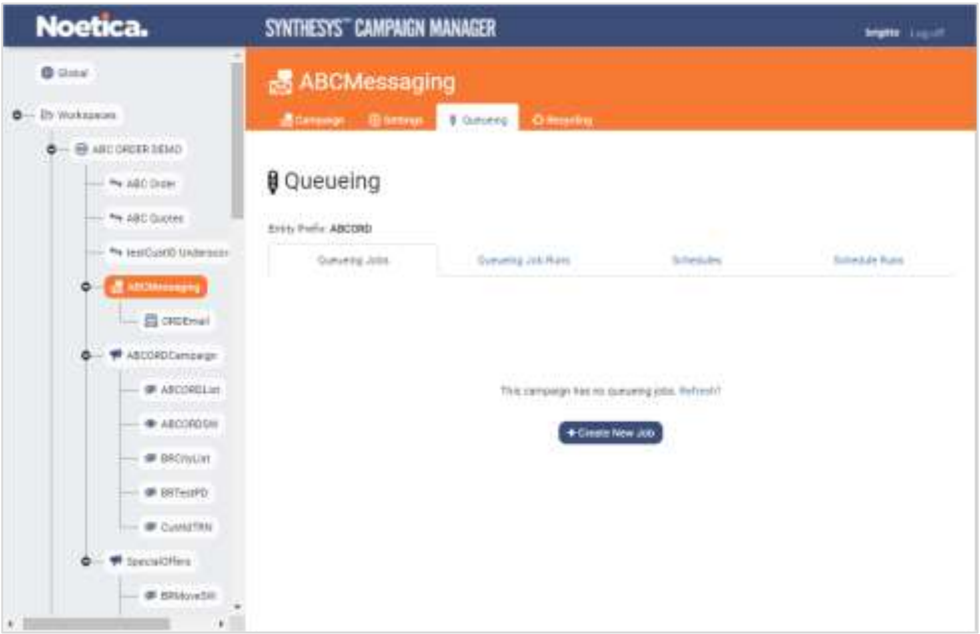
Queuing Records for SMS and Email Lists

Creating Queueing Jobs

Queueing jobs for SMS and Email lists are created at campaign level.

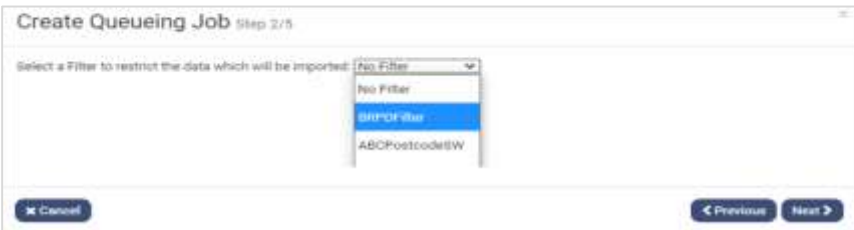
If you wish to queue selected customer entity data only, go to the **Filters** tab at *Workspace* level first, to create your filters, as required, specifying the conditions for the queueing job in the Filter Designer.

- Select the campaign that contains the list 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**.



- In the first page of the Create Queueing Job dialog, select either **SMS** or **Email**, to reflect the type of queuing job that you want to create.

- In the **Next>** page of the Queueing Job wizard, apply an existing filter, if you wish to queue selected Entity records only.



Next, select the Entity field containing either the mobile number or email address of the recipient.

- For **SMS** lists, select the Entity field that contains the recipient's mobile number.
- For **Email** lists, select the Entity field that contains the destination Email address.

- To prevent duplicate records from being queued, you can apply a duplicate check at List, Campaign or CRM/ Entity level.
- To remove all records from the list before queueing, tick **Clear current queue**.
- Tick **Filter against Do Not Call List**, to check the Phoenix_DoNotCall table for entries and to remove records from the queue if a match is found.

- In the last page, enter a logical **Job Name** for the queueing job.

- To edit the queueing job, click **Previous,** or **Cancel** the action without saving**.**
- To save the queueing job, click **Finish.** A message "Job created" will confirm that the queueing details have been saved.

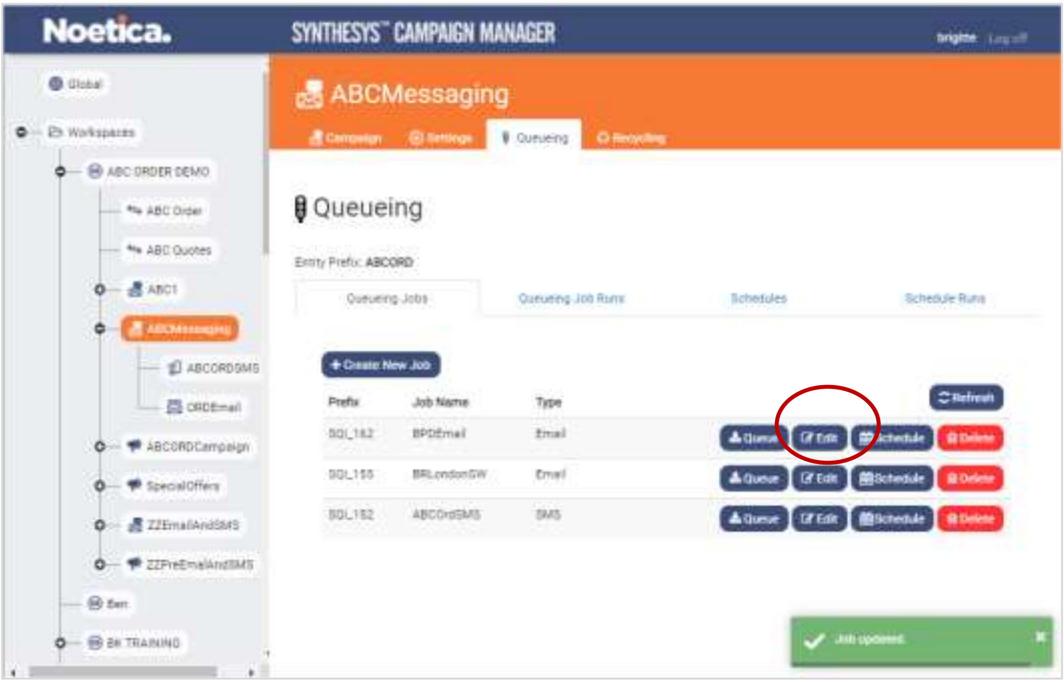
Please see the next pages for more information about editing and running queueing jobs.

Editing Queueing Jobs

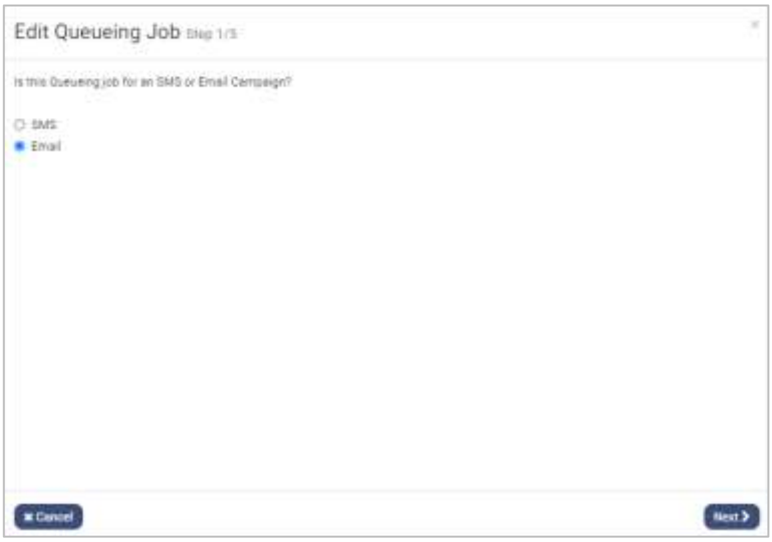
Having created and saved your Queueing Job, the job prefix and job name will be displayed in the Queueing dialog at Camapign level.

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, to view existing details and to make any changes, as required.

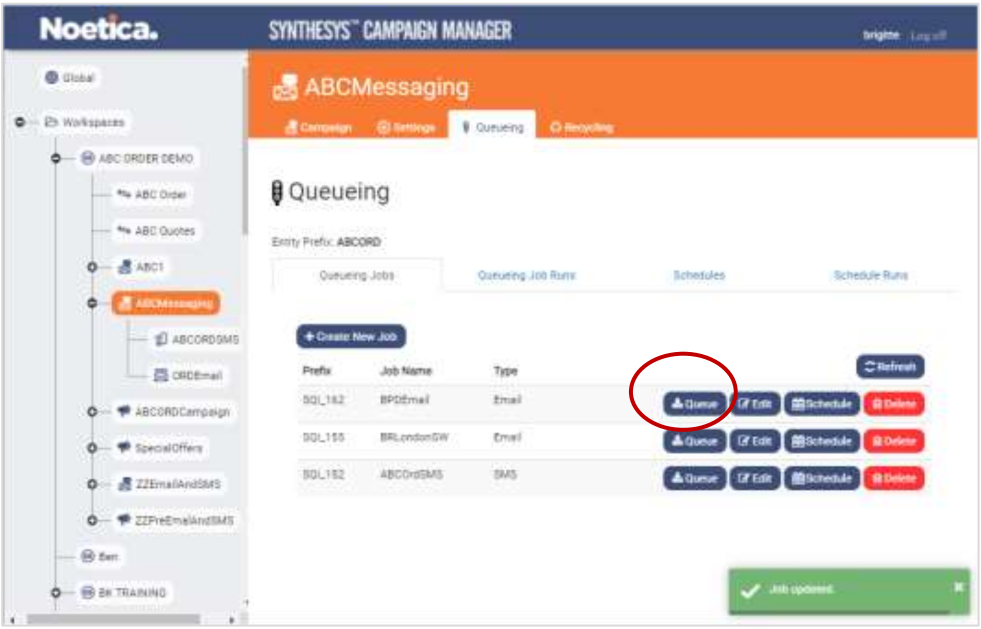


With the queueing conditions in place and confirmed, the next step is to run the queueing job, to place customer records into your respective SMS or Email lists.

Running Instant Queueing Jobs

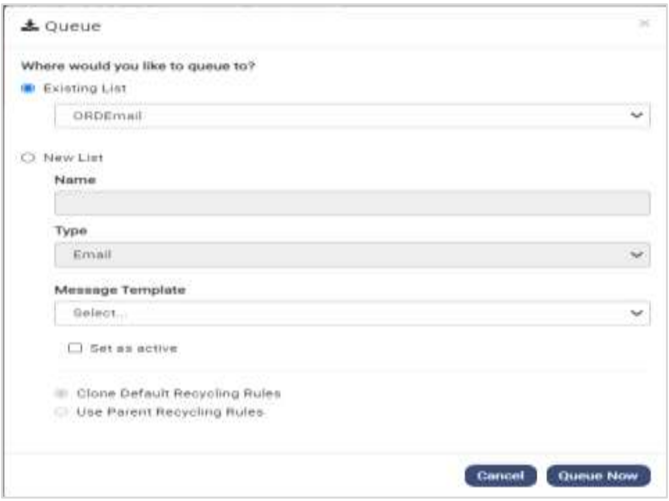
To run an instant queueing job, to place records into your SMS or Email list

- Select the queueing job that you wish to process in the Queueing dialog.
- Click the **Queue** button, to run the job immediately.



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 list into the **New List Name** field. The list **Type** SMS, or Email, will be selected automatically.
- If you want to activate the list to send out your SMS or Emails immediately, tick **Set to active**.

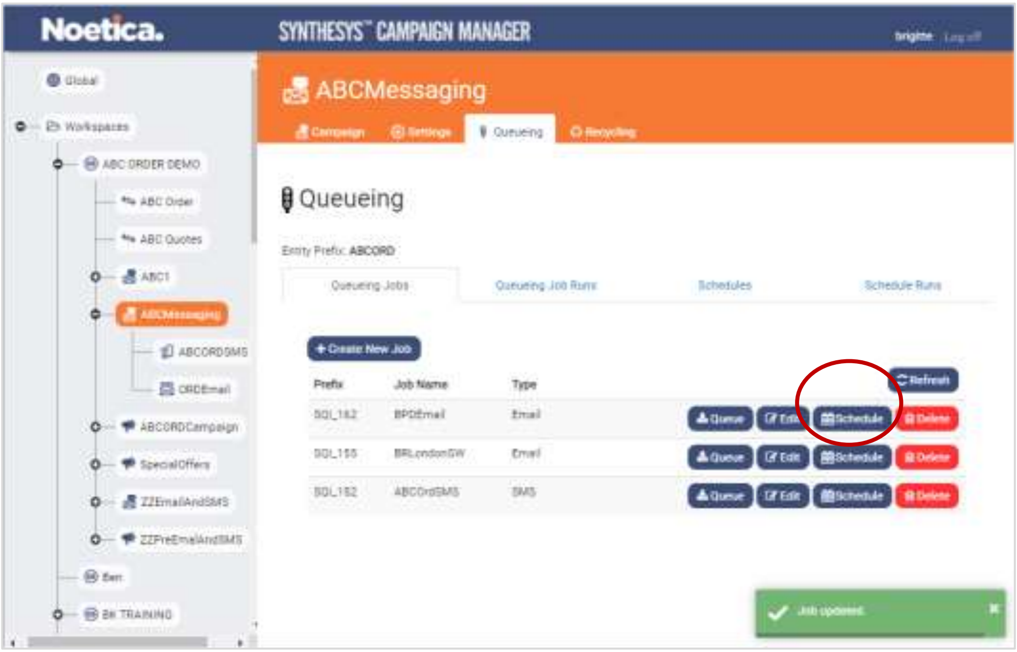


- To use the default recycling rules for the new SMS or email list, select **Clone Default Recycling Rules.** To use recycling rules created specifically for the selected messaging campaign, select **Use Parent Recycling Rules**.
- Click the **Queue Now** button to place the SMS or Email records into 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

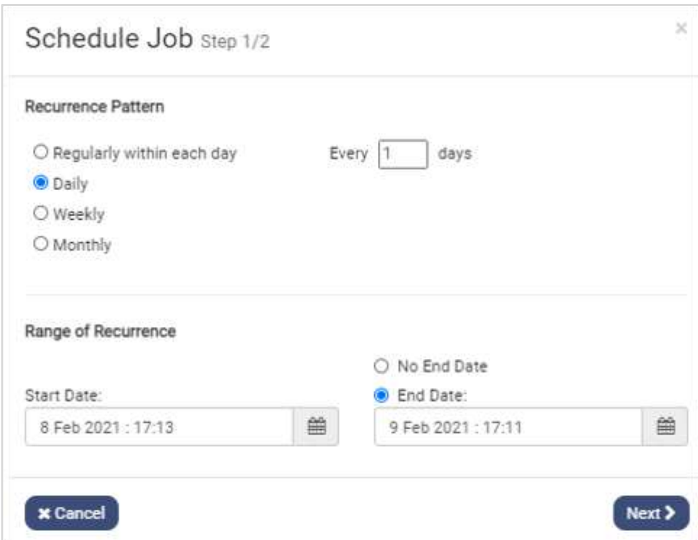
- Select the queueing job that you wish to run at campaign level, in the Queueing dialog, and click the **Schedule** button.



Adding Schedule Frequency

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

- In the **Recurrence Pattern section,** select Regularly within each day, Daily, Weekly or Monthly.
- Depending on your selection you can specify further associated details.

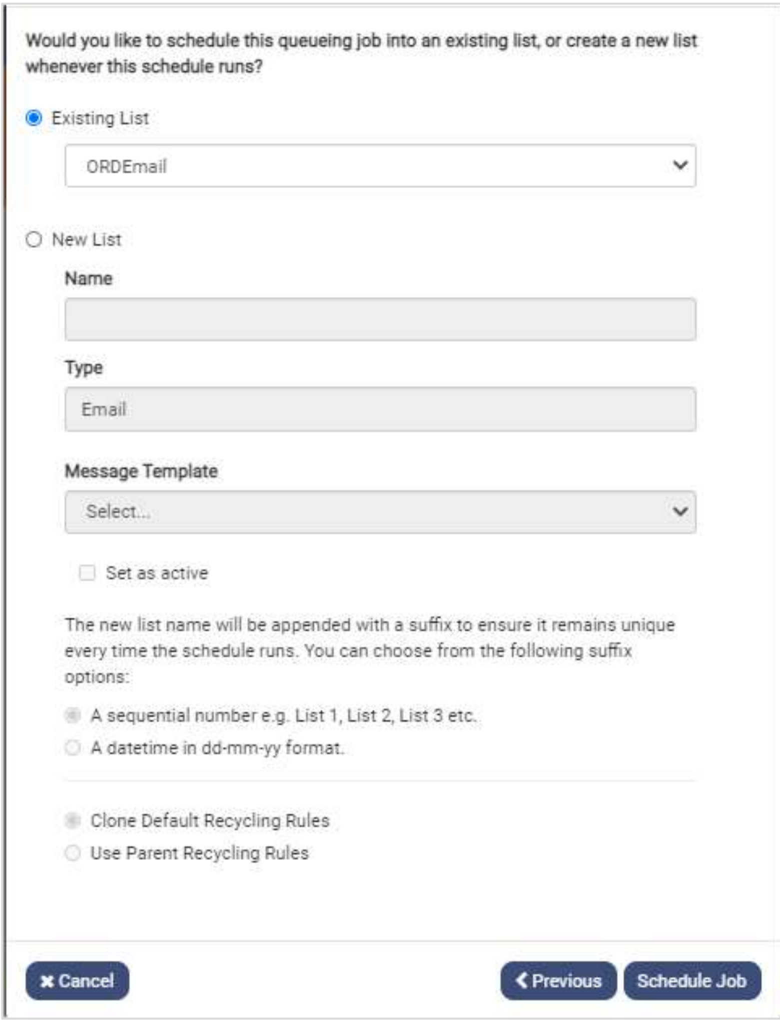


- In the **Range of Recurrence** section, select a **start date** for the schedule.
- Specify an **End Date** or continue to run your schedule indefinitely, not selecting an *End Date.*
- Click the Next> button to schedule your queueing job, and to place records either into an existing or a new SMS or email list, as required.

Schedule queueing to an existing list

To queue your SMS or Email records to an existing list

- Click **Existing List** and select the list for the queueing process from the drop-down menu.
- Next, choose if you want to **Clone Default Recycling Rules** or **Use Parent Recycling Rules,** created specifically for the selected messaging campaign.
- Click the **Schedule Job** button to save the information and to run the schedule at specified time or intervals. A message will confirm that the job has been scheduled.



Schedule queueing to a new list

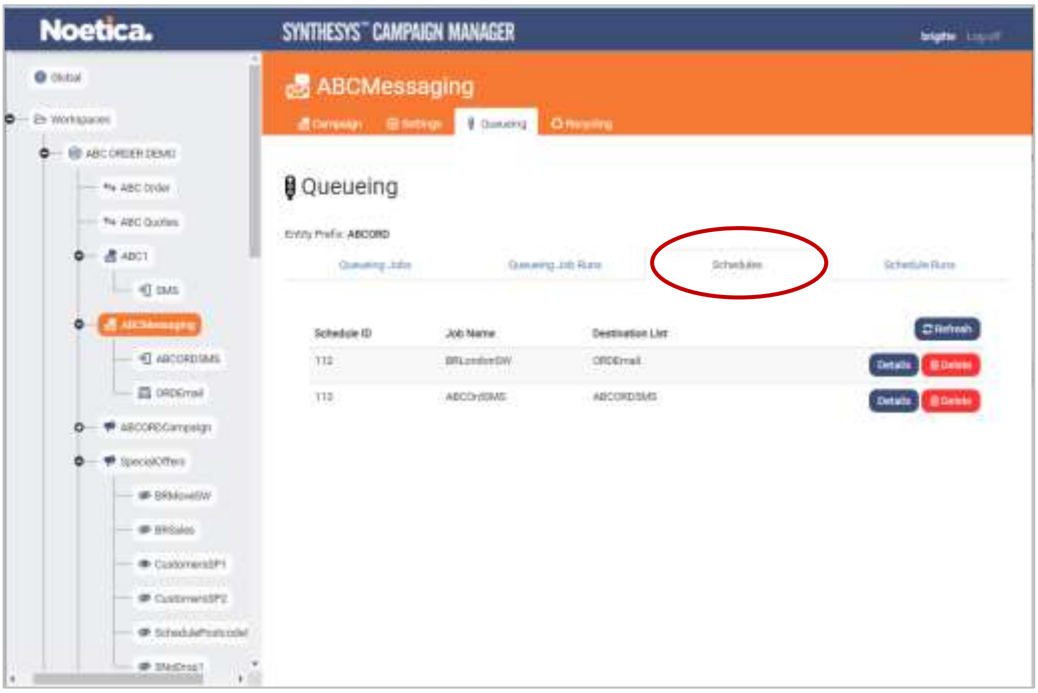
To queue your SMS or Email records into a new list, use the same dialog as above, but:

- Select **New List** and enter a name for the new list into the **New List Name** field.
- The list **Type** SMS, or Email, will be selected automatically.
- To activate the list immediately, tick **Set to active.**
- Select a **suffix** to append the list (a Sequential number or Datetime format**),** to ensure that each list name remains unique.
- Next, select **Clone Default Recycling Rules** or **Use Parent Recycling Rules,** if recycling rules were created specifically for the selected messaging campaign.
- Click the **Schedule Job** button to save the information and to run the schedule at a specified time or intervals. A message will confirm that the job has been scheduled.

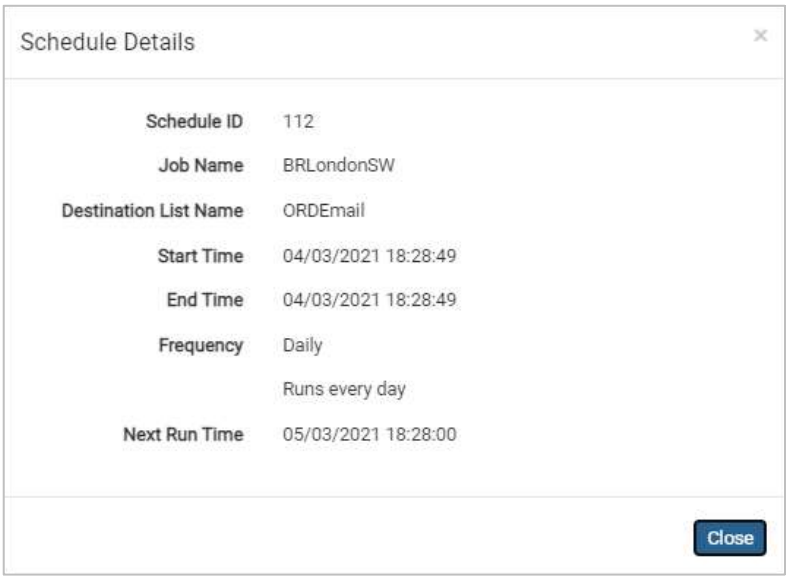
Viewing Schedule Details

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 view a summary of the selected schedule.



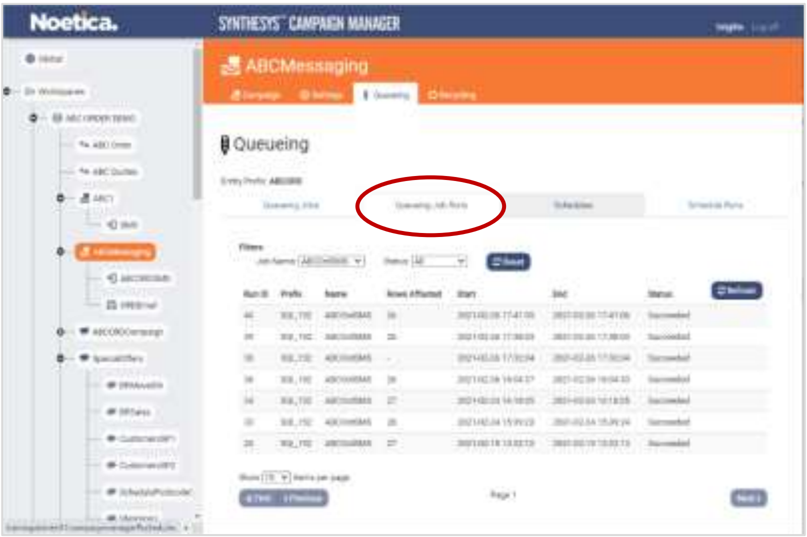
- To delete an existing queueing schedule, click the **Delete** button.

Viewing Queueing Job Runs

Instant Queueing Job Runs

To check details of instant queueing job runs for the messaging campaign

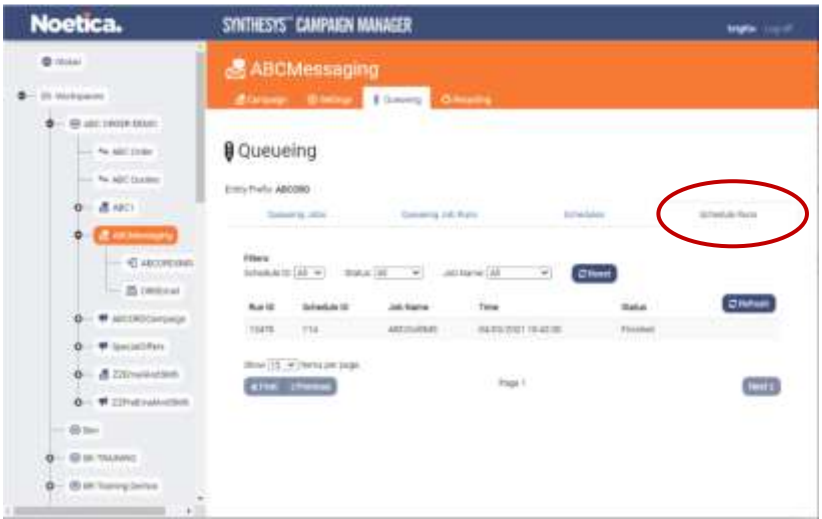
- Click the **Queueing** tab at the top right of the campaign dialog.
- In the Queueing page, select the **Queueing Job Runs** option.
- Use the **Filters** options **Job Name** and **Status** to display schedule runs for specific schedule jobs or schedule outcomes only.



Scheduled Queueing Job Runs

To check details of scheduled queueing job runs for the messaging campaign

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

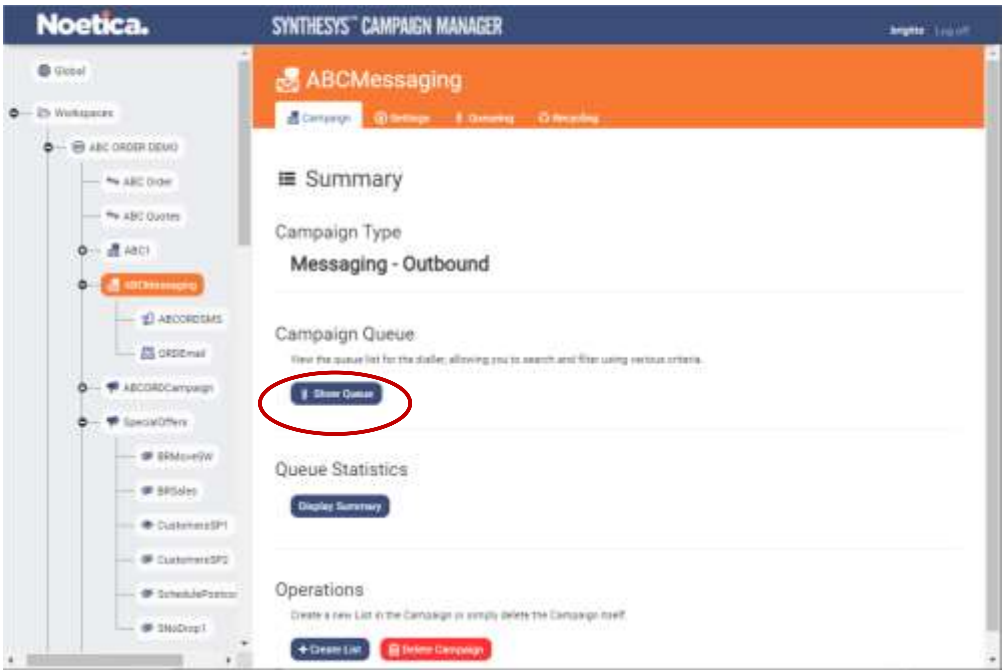


- Use the **Filters** options **Schedule ID, Status** and **Job Name,** to display schedule runs for specific schedule id's, schedule outcomes or schedule jobs only.

Viewing Queued Records

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

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



- The Queue dialog of the selected Messaging campaign for example, will show the queued items for all SMS and Email lists set up under the selected campaign.
- The Contact column shows the telephone number and selected Entity field (Mobile) and the email address and selected Entity field (Email).

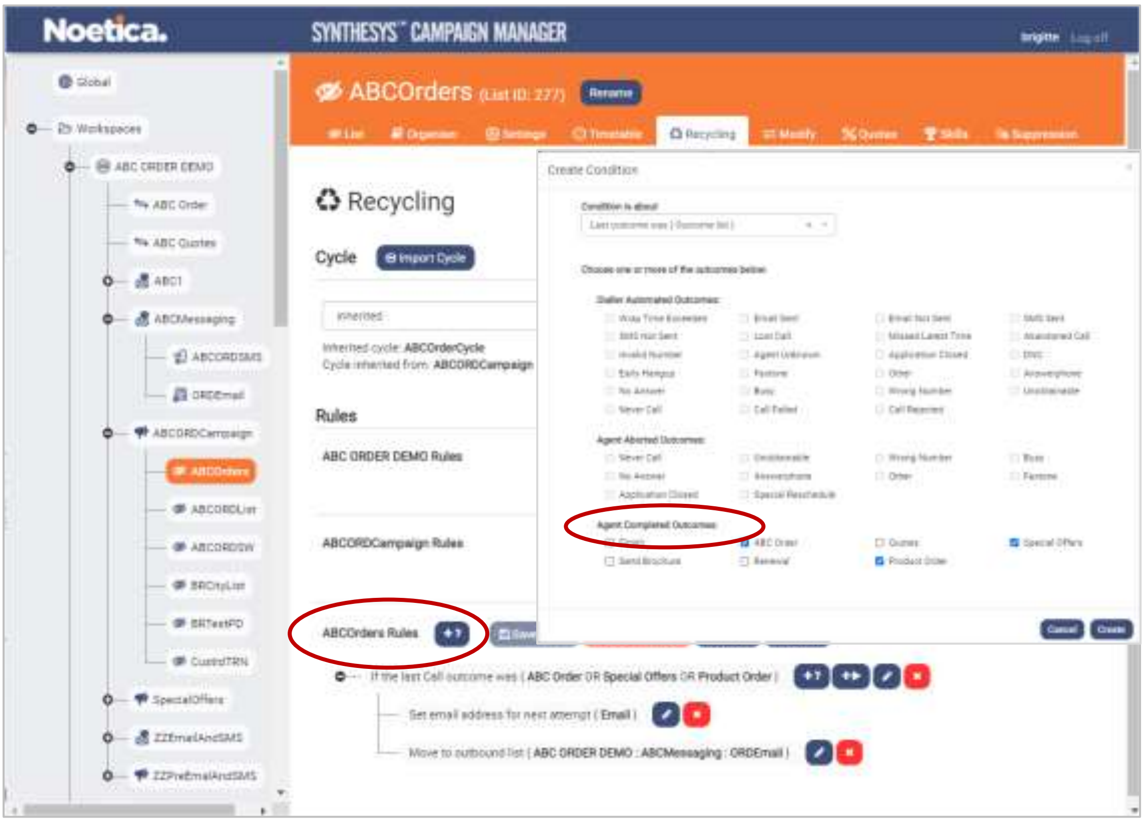
- To filter out and display specific call outcomes, click **Show Filter Option**.

To view a summary of the number of queued or sent SMS or emails, use the **Display Summary** option in the Queue Statistics session.

Recycling for SMS and Email Lists

When using SMS and Email outbound lists as part of a full customer contact strategy, you can create a set of recycling rules and actions in accordance with your requirements.

You could, for example, initially queue records to a call list and contact the customers on their home or work number. If no contact is made, or if a specific call outcome is achieved, you can follow up the call with an Email or SMS message.



To send a confirmation email to customers after placing an order, you would create the recycling rules on your initial call list, based on the call outcome in the scripted app, as selected by the agent when finalizing the call.

- Select the initial call list and click the **Call Recycling** tab at the top right of the dialog.
- Click the **+?** to open the **Create a Condition** dialog.
- Select the condition **If the Last Outcome was** and tick the relevant call outcomes under **Agent Completed Outcomes**, e.g., {ABCOrder OR SpecialOffers OR Product Order}.

Next, add the corresponding actions. First change the contact from telephone to email address, then move the record from the call list to the Email list, from which to send the confirmation email.

- Click **+> Action** and select **Set email address for next attempt to {**Email**}.**
- Click **+> Action** again, to create the second action, **Move to Outbound list** and select the relevant email list, e.g., {**ABC Order Demo: ABCMessaging: ORDEmail}.**

You would then create a couple of recycling rules on your Email list. If the Email was sent, finish the recycling rules. If the Email was not sent, try to resend it, or switch from the email address to the mobile number, move the record to an SMS list and send a quick SMS message to the customer.