

Managing Quotas

The screenshot shows the Noetica SYNTHESIS™ CAMPAIGN MANAGER interface. The top navigation bar includes the Noetica logo, the product name, and the user name 'brigitte' with a 'Log off' link. The main header for the current view is 'BRSales (List ID: 189)' with a 'Rename' button. Below this is a secondary navigation bar with icons for 'List', 'List Organiser', 'Settings', 'Active Times', 'Call Recycling', 'Bulk Queue Change', 'Quotas', and 'Skill Condition'. The 'Quotas' tab is active.

The main content area is titled '% Quota Conditions'. It shows the 'Quota Status' as 'Active' with a 'Deactivate' button. Below this is a 'Summary' section with the text 'Count of ("ABC Order") calls >= 300 for the current month'. A '+ Create Condition' button is visible. The 'Name' field is 'SalesTarget' and the 'SalesTarget' value is '300'. There are 'Edit', 'Delete', and 'Refresh' buttons for this condition. An 'Edit Condition' button is also present at the bottom right of the main content area.

The left sidebar shows a tree view of workspaces. The 'ABC ORDER DEMO' workspace is expanded, showing 'ABC Order', 'ABC Quotes', 'ABCORDCampaign', 'ABCORDList', 'BRPDLList', 'BRTestPD', 'ABCOQUOTES', 'SpecialOffers', 'BRSales', 'CustomersSP1', and 'CustomersSP2'. The 'BRSales' item is highlighted in orange.

The 'Edit Condition' dialog box is shown. It has a title bar with 'Edit Condition' and a close button. The 'Name' field contains 'SalesTarget'. Under 'Call Result', there are several checkboxes: 'Application Closed', 'Answerphone', 'Wrong Number', 'Reschedule', 'Faxtone', 'No Answer', 'Unobtainable', 'Finish', 'Other', 'Busy', 'Never Call', and 'ABC Order'. The 'ABC Order' checkbox is checked. The 'Limit' field contains '300'. Under 'Timespan', there are radio buttons for 'Total', 'Today', 'This week, starting...', and 'This month'. The 'This month' radio button is selected. A dropdown menu is open under 'This week, starting...', showing 'Monday'. There is also an 'Automatically restart' checkbox. At the bottom right, there are 'Cancel' and 'Save changes' buttons.

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MANAGING QUOTAS

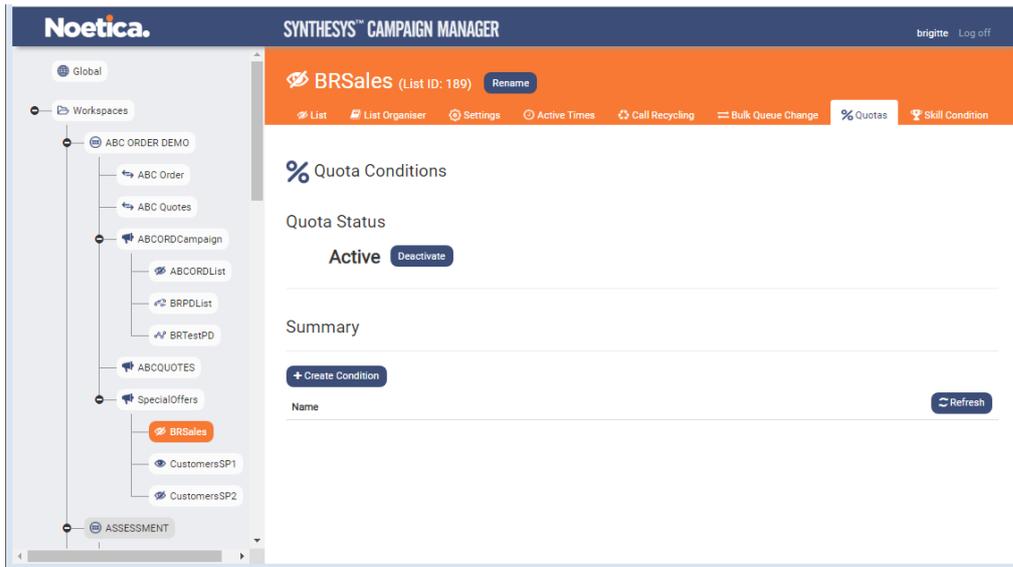
The **% Quotas** option in the Campaign Manager is available at **List** level.

Quota targets are used to deactivate a call list automatically when a predefined number of calls on selected call results in a set time period is achieved and written to the database.

When the call list is deactivated, no new calls will be presented to the agents.



The target may be exceeded when there are several agents already in a call for a list that has reached its target.



The screenshot shows the Noetica SYNTHESYS CAMPAIGN MANAGER interface. The user is logged in as 'brigitte'. The main header shows 'BRSales (List ID: 189)' with a 'Rename' button. Below the header, there are navigation tabs: 'List', 'List Organiser', 'Settings', 'Active Times', 'Call Recycling', 'Bulk Queue Change', '% Quotas', and 'Skill Condition'. The '% Quotas' tab is selected. The main content area is titled '% Quota Conditions' and shows 'Quota Status' as 'Active' with a 'Deactivate' button. Below this is a 'Summary' section with a '+ Create Condition' button and a 'Name' field with a 'Refresh' button. On the left side, there is a tree view of workspaces, including 'ABC ORDER DEMO', 'ABCORDCampaign', 'ABCQUOTES', 'SpecialOffers', and 'ASSESSMENT'.

Quota targets can be applied to more than one call result per list, either by selecting multiple call results in one condition, or by creating several Quotas for the selected call list.

Example of multiple call results in one condition:

- When a specified number of calls with result A or B is achieved for the selected period, then deactivate the call list.

Example of multiple conditions:

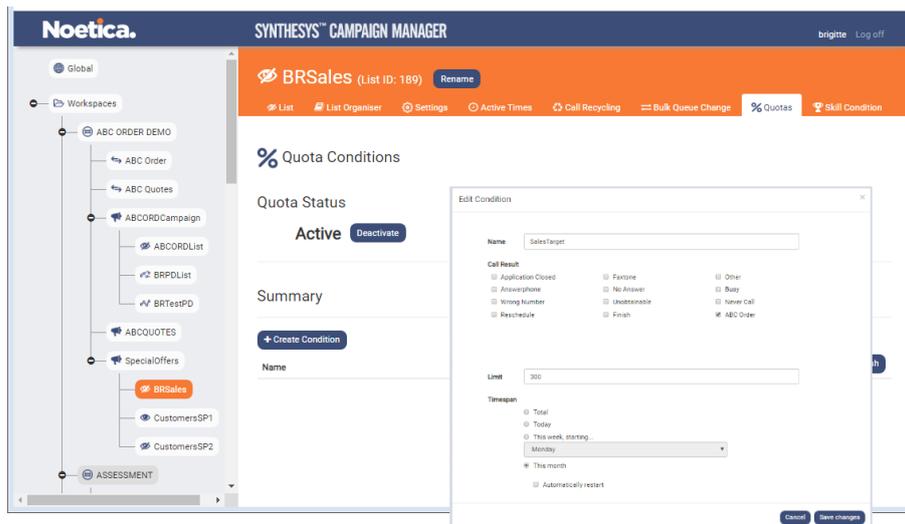
- When a specified number of calls with result A is achieved, OR when a specified number of calls with result B is achieved, deactivate the call list.

Quota targets can be changed whilst the campaign is live, without agents having to log out and back in again to pick up the changes made.

Defining Quotas

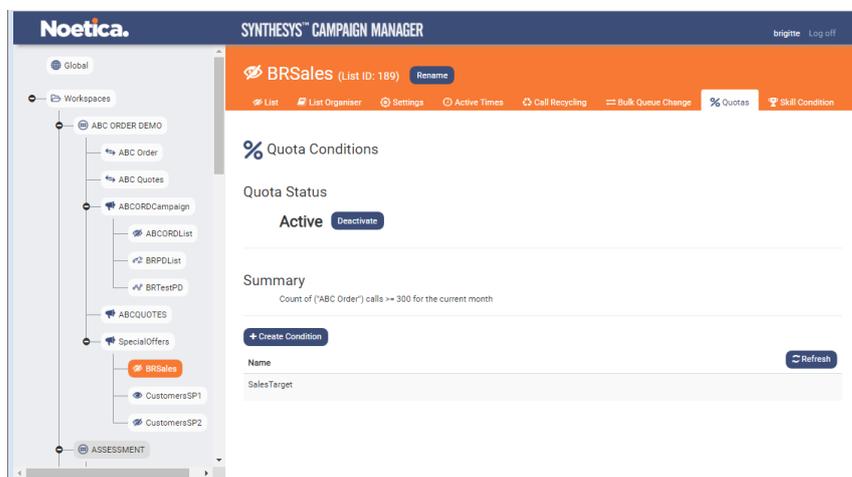
To set up your Quotas in the Campaign Manager

- Select the call list for which you want to create the Quota and click the **% Quotas** tab at the top right of the List dialog.
- Click the **Create Condition** button to open the *Create Condition* dialog and enter a name into the **Name** field.
- In the **Call Result** section, select the call outcome(s) to be used for your Quota.



- In the **Limit** field, specify the target number of calls to be taken on the selected call result(s), before the list will be deactivated automatically.
- In the **Timespan** section, select the time period in which the calls should be taken, i.e. in *Total, for Today, or this Week starting at a particular day, or for this Month*.
- If you wish to restart the list again automatically, either the following day, week or month, depending on the timespan selected, tick the **Automatically restart** option.
- Click the **Create** button to save the *Quota* or **Cancel** the action.

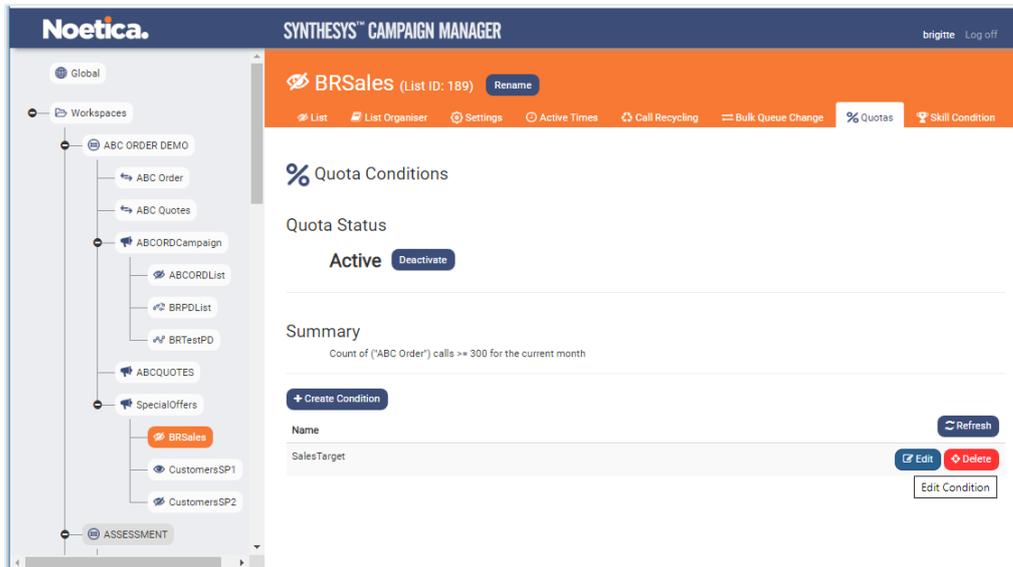
The **% Quota Conditions** dialog will display the *Quota Status* (Active or Inactive), and a *Summary* of the condition specified, including the selected call result(s), number of calls to be taken and the time range.



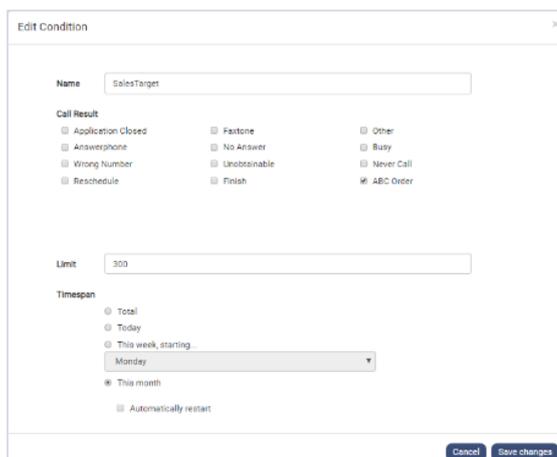
Editing existing Quotas

To modify an existing Quota:

- Select the call list with the Quota that you wish to edit.
- Move your mouse pointer over the relevant Quota condition in the Name section, and click the **Edit** button, to open the **Edit Condition** dialog.



- Make your changes as required, in the *Call Result, Limit and Timespan* sections.
- Click the **Save changes** button to save the changes or **Cancel** the action.




When a Quota target for a particular call result has been met, any changes made to the Quota on this call result will be ignored.

To edit or create a new Quota on a call result where a Quota has been met already, you need to delete the call list and created a new one.

Re-activating Call Lists with Quotas

When reactivating a call list that was deactivated because the predefined target set in *Quotas* was achieved, a message will be displayed, reminding you that the Quota for this list has been met.



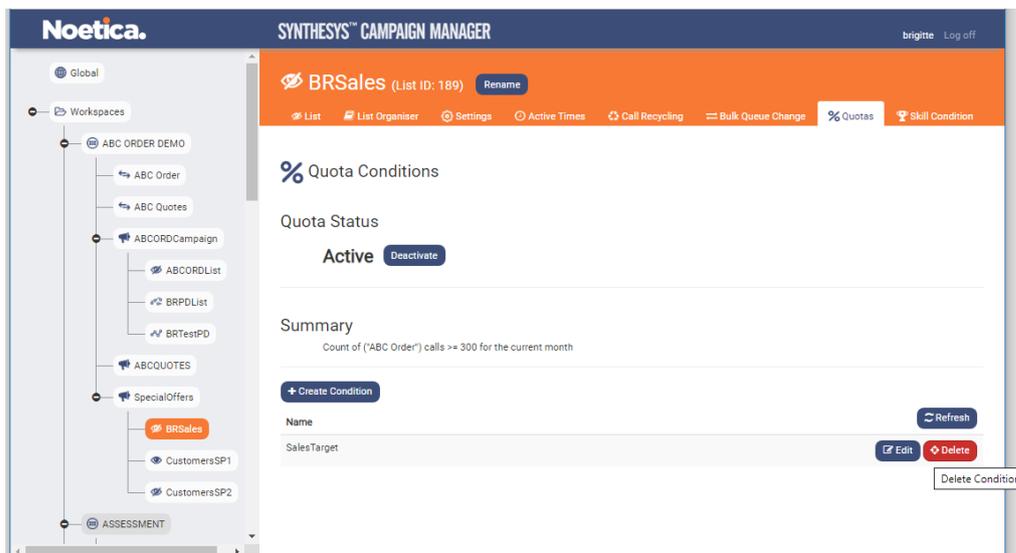
If you decide to reactivate the Quota as well, you will need to edit the Quota, before agents can take outbound calls on the list.

Whether or not the Quota is activated depends on the historical data for the corresponding call results held in the Phoenix_Statistics table.

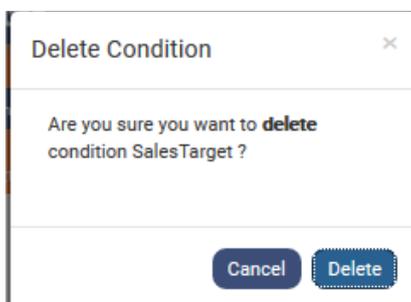
Deleting Quotas

To remove existing Quotas

- Select the call list with the Quota that you wish to delete.
- Move your mouse pointer over the Quota condition and click the **Delete** button.



- A message will ask you to confirm that you wish to delete the selected Quota condition.



- Click the **Delete** button to remove the condition or **Cancel** the action.