



Interval Manager

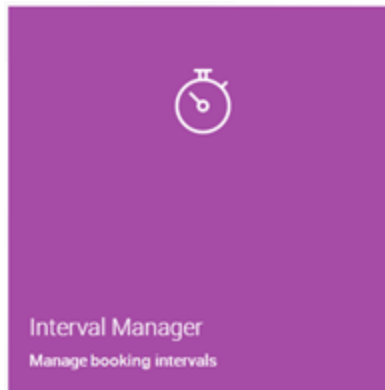
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1. Interval Manager

Use the **Interval Manager** tile of Syntelate Studio to configure a booking system. You can create booking systems to be used by your agents, your customers, or both.



EXAMPLE

Inisoft Travel created a booking system using **Interval Manager** to help the business manage callbacks effectively. The system is embedded into their website to provide a self-service facility for customers. Meanwhile, Inisoft Travel agents also have access to the system, from their desktop and the website, so they can edit or create callback bookings on behalf of customers.

- » Customers can visit the Inisoft Travel website to check availability and then complete a booking by themselves.
- » Agents at Inisoft Travel have visibility of the bookings, which means they can make changes to existing ones, or create new bookings for customers who

- » request assistance with the process.
- » Supervisors have visibility of callback demand, so training and holidays can be scheduled effectively.

The rest of this topic describes the Interval Manager's features and how to configure its settings.

1.1 Concepts

Interval Manager

Manage Weekly Pattern

Weekly pattern
✕
+

	Sunday ✕	Monday ✕	Tuesday ✕	Wednesday ✕	Thursday ✕	Friday ✕	Saturday ✕
09:00 - 09:15		3	3	3	3	3	
09:15 - 09:30		3	3	3	3	3	
09:30 - 09:45		3	3	3	3	3	
09:45 - 10:00		3	3	3	3	3	
10:00 - 10:15		3	3	3	3	3	
10:15 - 10:30		3	3	3	3	3	
10:30 - 10:45		3	3	3	3	3	
10:45 - 11:00		3	3	3	3	3	
11:00 - 11:15		3	3	3	3	3	
11:15 - 11:30		3	3	3	3	3	
11:30 - 11:45		3	3	3	3	3	
11:45 - 12:00		3	3	3	3	3	
12:00 - 12:15		3	3	3	3	3	
12:15 - 12:30		3	3	3	3	3	
12:30 - 12:45		3	3	3	3	3	
12:45 - 13:00		3	3	3	3	3	
13:00 - 13:15		3	3		3	3	
13:15 - 13:30		3	3		3	3	
13:30 - 13:45		3	3		3	3	
13:45 - 14:00		3	3		3	3	
14:00 - 14:15		3	3		3	3	

An **interval** is a time slot that agents can assign tasks to.

A **task** is a piece of work to be completed at a particular time, for example, a callback. In the above screenshot the number inside each green interval is the maximum number of tasks (such as callbacks) that can be assigned to that interval.

An **interval group** is used to organize intervals together so that you can specify certain settings for the group, rather than for each interval. Interval groups become especially useful if you need to create more than one group. For example, one group for sales and a second group for support. An interval group includes the following settings:

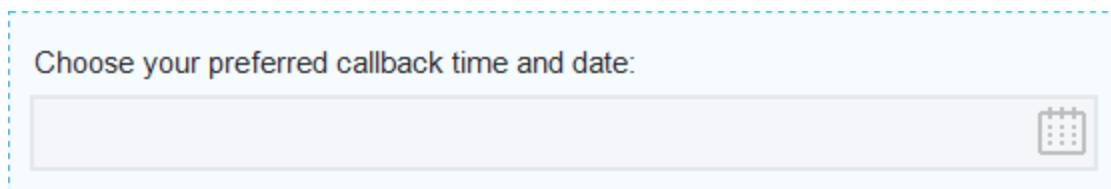
- » **A weekly pattern:** Defines the intervals in a typical week, for example:
 - » Fifteen-minute intervals for Monday to Friday, from 9:00 AM to 6:00 PM; four tasks per interval.
 - » Fifteen-minute intervals for Saturdays, from 10:00 AM to 4:00 PM; four tasks per interval.
 - » No intervals on Sundays.
- » **Overrides:** One-off exceptions to the weekly pattern. For example, Wednesday 14 June is a training day and a reduced number of agents will be available. The intervals on that day could be overridden to only allow two tasks per interval.
- » **Holidays:** Days when no intervals are available for agents to assign tasks to (because the call center is closed, for example).

An interval group can be assigned to a workzone and to a specific date box with intervals control. While working on an interaction record, this allows agents to use a date box with intervals control to book a task to an interval, such as a callback.

1.1.1 Self-service booking system


If you want to give your customers the ability to book their own appointments from your website, first use the Interval Manager to create a booking system. You can then embed the system as a form on your website to enable customers to make their own bookings.

The booking system will look like a text box, like in this screenshot:



Choose your preferred callback time and date:

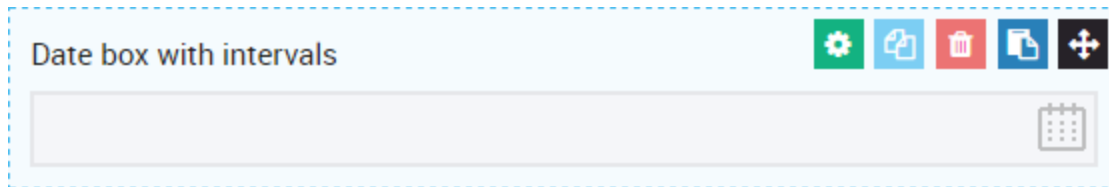
When a customer clicks the text box, the interval group that you have defined will appear on the screen.

Select interval ✕							
	Tuesday 10/04/2018	Wednesday 11/04/2018	Thursday 12/04/2018	Friday 13/04/2018	Saturday 14/04/2018	Sunday 15/04/2018	Monday 16/04/2018
09:00 - 09:15		1	3	2			2
09:15 - 09:30		4	4	4			4
09:30 - 09:45		2	4	3			4
09:45 - 10:00		4	2	3			1
10:00 - 10:15		3	4	2	0		4
10:15 - 10:30		1	2	4	2		2
10:30 - 10:45		0	1	2	4		4

[PREVIOUS WEEK](#)
[NEXT WEEK](#)

The customer can then choose an appointment slot from the available intervals.

You can let agents manage those customer bookings by adding the date box with intervals control to the agents' desktop.



Alternatively, agents can manage bookings by using the same online form as the customer.

For instructions on how to use the Interval Manager, read through the **Tasks** in this document.

2. Tasks


This section provides step-by-step instructions for the various tasks that you can perform.


2.1 Managing Weekdays

From the **Interval Manager Home** page, you can manage your weekday configuration, including the first day of the week and the label for each day of the week. The first day of the week that you define here *must* be the same as the first day of the week in your Microsoft SQL Server configuration.

EXAMPLE


Jack's SQL Server configuration gives Sunday as the first day of the week (the default for US English). As such, Jack ensures that Sunday is also given as the first day of the week in the Interval Manager.


 **Warning:** You *must* correctly set up your weekday configuration before doing anything else in the Interval Manager! If SQL Server and the Interval Manager each consider a different day to be the first day of the week, then any interval groups that you add will *not* be correctly set up.


 **Note:** Once set up, you should not need to edit your weekday configuration.

For more information about the first day of the week in SQL Server, see <https://docs.microsoft.com/en-us/sql/t-sql/statements/set-datefirst-transact-sql>.


To edit your weekday configuration, follow these steps:

1. From the **Interval Manager Home** page, click  for the first record in the **WEEKDAY** table. The **Edit Weekdays** page is shown.
2. In the box, type the name of the first day of the week.


 **Note:** This must be the first day of the week in your SQL Server configuration.

3. Click .
4. Repeat steps 1-3 for the other days of the week.

2.2 Adding an Interval Group

 **Warning:** Once an interval group has been added, you cannot delete it. You can, however, edit its details.

To add a new interval group, follow these steps:

1. From the **Interval Manager Home** page, click . The **Add Interval Group** page is shown.
2. In the **Description** box, type a description for your interval group.
3. In the **Interval time (minutes)** box, type the number of minutes in an interval.

EXAMPLE

Jack wants agents to be able to select a half-hour slot for a callback, for example 9:30-10:00 AM or 2:00-2:30 PM. In the **Interval time (minutes)** box, he types **30**.


4. If you wish to allow agent-owned tasks, click **Yes** for **Allow agent-owned tasks?**
5. (Optional) In the **Max days** box, type the number of days in the future that an agent can arrange a task.

EXAMPLE

When agents arrange a callback, Jack wants them to be able to select a date in the next two weeks, but not a date beyond that. In the **Max days** box, Jack types **14**.



Note: If you leave this box empty, then agents will be able to book tasks for any time in the future.

6. Click . A dialog box appears, informing you that – once created – the interval group cannot be deleted.
7. Click **SAVE**.

A page is shown that displays your interval group’s details. From this page you can define a weekly pattern and add overrides and holidays.

2.2.1 What's Next?

You've now added a basic interval group, but there's still more to do! See the following tasks:


- » [Managing the Weekly Pattern](#) below
- » [Managing Overrides](#) on page 17
- » [Managing Holidays](#) on page 22

2.3 Managing the Weekly Pattern




The weekly pattern defines:

- » The intervals (slots) that are available in a typical week
- » The number of tasks that can be assigned to each interval

2.3.1 Defining the Pattern for a Weekday

 **Warning:** After you define a weekly pattern, you won't be able to change the number of minutes in an interval (unless you delete the weekly pattern).

To define the pattern for a particular day, follow these steps:


1. From the **Interval Manager Home** page, click  for the interval group that you wish to edit. The **<Interval Group Description>** page is shown.
2. In the **Weekly pattern** section, click . The **Manage Weekly Pattern** page is shown.
3. Click . The **Add slots** section is shown.
4. In the **Day of week** dropdown, select the weekday for which you wish to add the pattern.
5. In the **Start time** and **End time** boxes, type the start and end time for the pattern, for example **08:00 AM** and **08:00 PM**.
6. In the **Max tasks (per interval)** box, type the maximum number of tasks that can be assigned to a single interval.



Note: You can change the value for specific intervals later. For example, you may wish fewer tasks to be booked over the lunch period because you have fewer agents working then.


For now, enter a default value.

7. In the **Max agent-owned tasks** box, type the maximum number of agent-owned tasks that can be assigned to a single interval. This number cannot be higher than the number in the **Max tasks (per interval)** box.

 **Note:** This box only shows if agent-owned tasks are allowed for the interval group.

8. The **Max agents on tasks**, **Max idle agents**, and **Min idle agents** boxes are redundant and awaiting de-release. Because these are mandatory fields, you must type a number into each field to proceed: type any number.

9. Click .

 **Note:** You can define more than one pattern for a weekday, although these patterns cannot overlap. For example, you could define two patterns for Mondays:

- » 8:00 AM to 4:00 PM
- » 4:00 PM to 8:00 PM

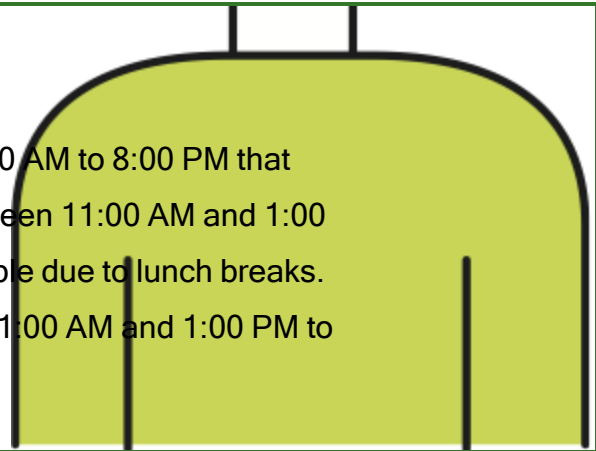
You could configure these patterns to allow a different number of tasks per interval and so on. For example, you could allow fewer tasks in the evening because you usually have fewer agents working then.

2.3.2 Editing an Interval

Once you have defined a pattern for a weekday, you can edit the settings for specific intervals.



EXAMPLE


Jack has defined a pattern for Mondays 8:00 AM to 8:00 PM that allows 60 tasks per interval. However, between 11:00 AM and 1:00 PM, his call center has fewer agents available due to lunch breaks. As such, Jack edits the intervals between 11:00 AM and 1:00 PM to only allow 30 tasks per interval.



Note: You can also edit an interval for a specific day (for example, an interval on Wednesday 14 June rather than an interval on Wednesdays in general). For more information, see [Managing Overrides](#) on page 17.

To edit the settings for an interval in your weekly pattern, follow these steps:

1. From the **Interval Manager Home** page, click  for the interval group that you wish to edit. The **<Interval Group Description>** page is shown.
2. In the **Weekly pattern** section, click . The **Manage Weekly Pattern** page is shown.

3. Click the interval that you want to edit. The **Edit slot** section is shown.
4. Edit the details of the interval as required.
5. Click .




2.3.3 Deleting a Weekday's Pattern



Note: You cannot delete a weekday's pattern if the interval group is associated with a workzone.

Deleting a weekday's pattern does *not* cancel any tasks that agents have already booked to that weekday.

To delete the pattern for a particular weekday, follow these steps:

1. From the **Interval Manager Home** page, click  for the interval group that you wish to edit. The **<Interval Group Description>** page is shown.
2. In the **Weekly pattern** section, click . The **Manage Weekly Pattern** page is shown.
3. Click  for the weekday whose pattern you want to delete. A dialog box appears, asking you to confirm the deletion.
4. Click **DELETE**.




2.3.4 Deleting the Weekly Pattern



Note: You cannot delete the weekly pattern if the interval group is associated with a workzone.

Deleting the weekly pattern does *not* cancel any tasks that agents have already booked.

To delete the entire weekly pattern, including any overrides that you have defined, follow these steps:

1. From the **Interval Manager Home** page, click  for the interval group that you wish to edit. The **<Interval Group Description>** page is shown.
2. In the **Weekly pattern** section, click . The **Manage Weekly Pattern** page is shown.
3. Click . A dialog box appears, asking you to confirm the deletion.
4. Click **DELETE**.

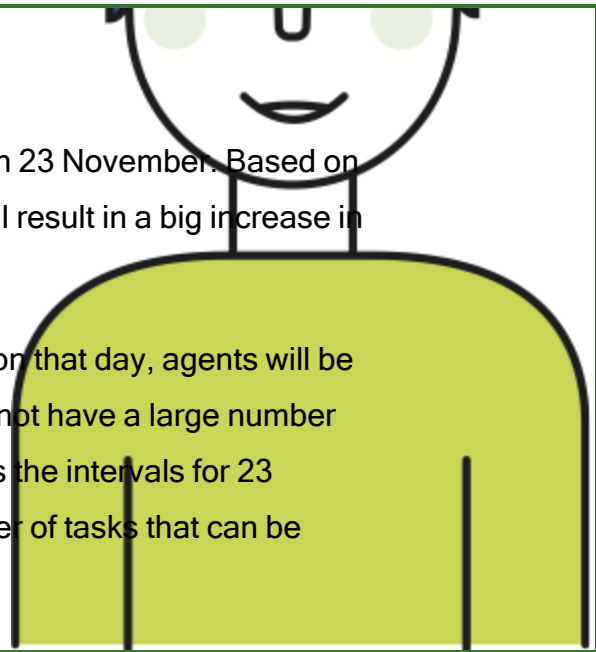
2.4 Managing Overrides

The weekly pattern defines the interval configuration for a *typical* week. You can, however, override specific intervals on specific days.

EXAMPLE

Inisoft Travel will run a special sales offer on 23 November. Based on previous experience, they know that this will result in a big increase in customer calls.

Jack at Inisoft Travel wants to ensure that, on that day, agents will be able to focus on inbound calls; they should not have a large number of callbacks to work through. Jack overrides the intervals for 23 November to significantly reduce the number of tasks that can be booked on that day.



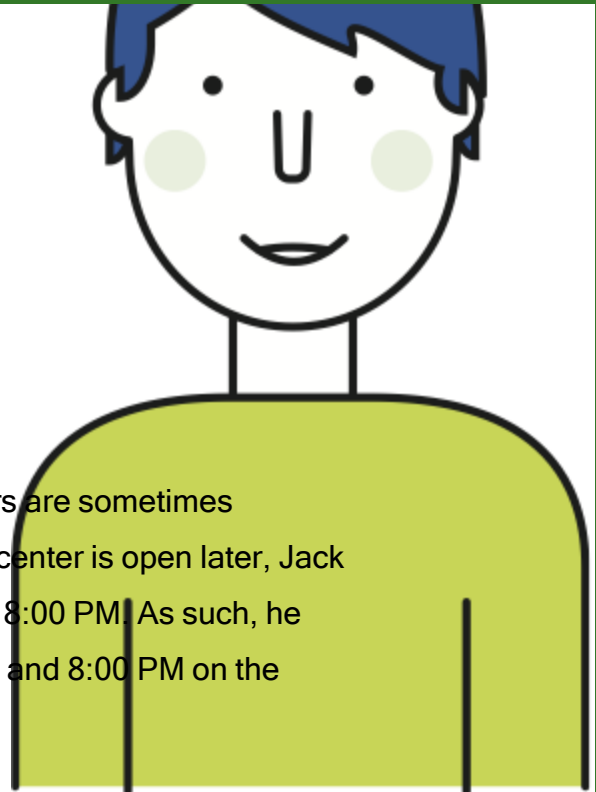
As well as overriding existing intervals, you can override an empty slot to create an interval.

EXAMPLE

Inisoft Travel's call center is open:

- » Monday-Friday 8:00 AM to 8:00 PM
- » Saturday 9:00 AM to 5:00 PM
- » Sunday closed


At busy periods, the Saturday opening hours are sometimes extended to 8:00 PM. On days that the call center is open later, Jack wants agents to be able to book tasks up to 8:00 PM. As such, he overrides the empty slots between 5:00 PM and 8:00 PM on the affected Saturdays.



2.4.1 Interval Colors

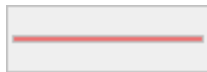
In the **Intervals** section of the **<Interval Group Description>** page, the following colors are used for intervals:

- » **Green:** A typical interval (its settings are those defined in the weekly pattern)
- » **Pink:** An interval that has been overridden to have 0 max tasks
- » **Dark blue:** An interval or empty slot that:
 - » Has been overridden
 - » Has a number of max tasks other than 0

	Monday 6/12/2017	Tuesday 6/13/2017
09:00 - 09:30	5	5
09:30 - 10:00	5	5
10:00 - 10:30	0	10
10:30 - 11:00	5	5
11:00 - 11:30	5	5

Annotations in the table:


- "Typical interval" points to the 09:00 - 09:30 slot on Monday.
- "Overridden: 0 max tasks" points to the 10:00 - 10:30 slot on Monday.
- "Overridden: other" points to the 10:30 - 11:00 slot on Tuesday.




indicates an empty slot, as defined by the weekly pattern or a holiday.


2.4.2 Overriding an Interval


To override an interval (or empty slot), follow these steps:

1. From the **Interval Manager Home** page, click  for the interval group that you wish to edit. The **<Interval Group Description>** page is shown.
2. In the **Intervals** section, click the interval or empty slot that you want to override. For an existing interval, the interval's details are shown in the **Interval details** section, including whether any tasks have already been assigned to that interval. For an empty slot, the **Add Interval Override** page is shown.



Tip: You can click **NEXT WEEK** to move forward one week. To find a specific date, click  to open a calendar, from which you can select a date.


3. For an existing interval, click **EDIT** in the **Interval details** section. The **Add Interval Override** page is shown.
4. Edit (or complete) the fields of the **Add Interval Override** page.
5. Click .



 **Note:** If you're reducing the interval's maximum number of tasks below the number of tasks that have already been assigned to the interval, a dialog box appears informing you of this. Click **SAVE** to proceed.

The tasks that have already been assigned to the interval are *not* canceled.

2.4.3 Restoring the Pattern / Deleting an Override

To restore an overridden interval to its default pattern, or to delete an overridden empty slot, follow these steps:

1. From the **Interval Manager Home** page, click  for the interval group that you wish to edit. The **<Interval Group Description>** page is shown.
2. In the **Intervals** section, click the overridden interval that you want to restore/delete. The interval's details are shown in the **Interval details** section.

 **Tip:** You can click **NEXT WEEK** to move forward one week. To find a specific date, click  to open a calendar, from which you can select a date.

3. In the **Interval details** section, click:
 - a. **RESTORE PATTERN** (for an overridden interval)
 - b. **DELETE** (for an overridden empty slot)

A dialog box appears, asking you to confirm the restore/deletion.

4. Click **RESTORE PATTERN / DELETE**.



Tip: You can also restore/delete an override from the **Edit Interval Override** page.

2.5 Managing Holidays




In the **Interval Manager**, you can add holidays. Adding a holiday closes all the intervals for that day so that no tasks can be booked.



Note: You can override intervals on a holiday in the same way that you would override any other interval. For more information about overriding intervals, see [Managing Overrides](#) on page 17.




2.5.1 Adding a Holiday

To add a holiday, follow these steps:

1. From the **Interval Manager Home** page, click  for the interval group that you wish to edit. The **<Interval Group Description>** page is shown.
2. In the **Holidays** section, click . The **Add Holiday** page is shown.
3. In the **Start date** and **End date** boxes, enter the start and end dates of the holiday.
4. Click .



2.5.2 Editing a Holiday

To edit an individual holiday date, follow these steps:

1. From the **Interval Manager Home** page, click  for the interval group that you wish to edit. The **<Interval Group Description>** page is shown.
2. In the **Holidays** section, click  for the holiday date that you want to edit. The **Edit Holiday** page is shown.
3. In the **Start date** box, enter a new date for the holiday.
4. Click .

2.5.3 Deleting a Holiday

To delete an individual holiday date, follow these steps:

1. From the **Interval Manager Home** page, click  for the interval group that you wish to edit. The **<Interval Group Description>** page is shown.
2. In the **Holidays** section, click  for the holiday date that you want to delete. A dialog box appears, asking you to confirm the deletion.
3. Click **DELETE**.

Support and Training

Questions? Contact Inisoft Support (+44 (0)800 668 1290, support@inisoft.com).

Interested in training for your call center? Then why not get in touch? Email us at sales@inisoft.com and ask to speak to our Professional Services team.