Software by Inisoft

syntelate XA

Studio

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1. Studio

Syntelate Studio is a web application that is used to configure many of the back-end features of Syntelate XA, such as message gateways and worklist imports.

This section provides an introduction to Syntelate Studio and an overview of the key management tasks you can perform in it.

2. Fulfilment Server

Use the **Fulfilment Server** tile of Syntelate Studio to manage fulfilments.

2.1 What's a Fulfilment?

A **fulfilment** consists of:

- **A SQL Select statement:** A SQL Select statement returns a result set of records from one or more database tables.
- **Fulfilment actions:** The actions to be performed against each record returned by the SQL Select statement. Each action is a SQL statement.

Syntelate Studio lets you schedule how frequently each fulfilment should be run.

EXAMPLE

After each inbound call, Inisoft Travel try to capture feedback from the customer about their experience of speaking with an agent. This is so that they can use this feedback to improve their service offering (Voice of the Customer).

Inisoft Travel's approach is, at the end of each day, to send an email to all customers who called in that day, asking them to complete a short survey online.

In Syntelate XA, this is achieved via the Fulfilment Server. Inisoft Travel have configured a fulfilment that runs every day at 6:00 PM. The fulfilment's **SQL Select statement** selects all records in the INTERACTION_X table for inbound calls that were made that day. For each matching record, Syntelate XA then performs the following **fulfilment action**:

- **Inserts** a new record into INTERACTION_X_NEWMESSAGE (the outgoing message table) with the following field values:
    - LKTL_TO: The customer's email address
    - LKTL_SUBJECT: "Thanks for calling us!"
    - LKTL_MESSAGE: A message thanking the customer for phoning in and asking them to visit a URL to complete a short feedback survey about their experience

The Outbound Gateway service then picks up the new records in INTERACTION_X_NEWMESSAGE and sends the feedback emails to customers.

2.2 Editing Fulfilments

We recommend that you always make a fulfilment dormant before making any changes to it.

2.3 Error Handling

If Syntelate XA encounters an error while performing a fulfilment action on a record, then any other fulfilment actions that have already performed on that record are rolled back.

2.4 synTelate's SQL Functions

Syntelate Studio lets you add several functions to your SQL statements simply by double-clicking the appropriate function. These functions are:

Name	Syntax	Description
Get Client Counter	`GetClientCounter ('[CounterName]')`	Adds 1 to the specified counter and returns this value. Available for fulfilment actions only. For the `[CounterName]` parameter, you can pass the following values: » `CLIENTNO` » `LOGAGENT` » `SINGLETOUCHID` » `CALLSTATUSLOGCALLID` » Any counter in the COUNT1 table of your database (for example, `COMPLETIONCODEID`, `CONTACT_ID`, and so on) If no value is passed (in other words, `GetClientCounter()`), then `CLIENTNO` is assumed.
Completed Records Only	`([LKTL_ COMPLETED] = 'Y')`	Use as part of your SQL statement to restrict selection/actions to completed interaction records only. For example, to select all completed records in table

Name	Syntax	Description
		INTERACTION_1, use the following SQL: `SELECT * FROM INTERACTION_1 WHERE ([LKTL_COMPLETED] = 'Y');`
Could Not Contact	`([LKTL_COMPLETED] = 'N' AND [LKTL_NUMTRIES] = 0)`	Use as part of your SQL statement to restrict selection/actions to interaction records where contact with the customer was not made.

2.5 SQL Server Functions

You can also use the following Microsoft SQL Server functions in your SQL statements:

Function	Description
`GETDATE()`	Returns the current date and time.
`CONVERT(DATE, GETDATE())`	Returns the current date only.
`CONVERT(TIME(0), GETDATE())`	Returns the current time only.
`@[fieldname]`	Returns the value of the specified field in the record returned by the SQL Select statement.

2.6 Tasks

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

2.7 Adding a Fulfilment

To add a new fulfilment, from the Fulfilment Server home page, click +. The new fulfilment is created immediately, and the **Fulfilment details** page is shown.

2.7.1 What's Next?

Next you need to define what the fulfilment should do and when it should be run. See the following tasks:

- Setting the Fulfilment Details on page 22
- Managing Fulfilment Actions on the next page
- Managing Fulfilment Emails on page 20

2.8 Deleting a Fulfilment

Note: You can only delete fulfilments that have *not* been run.

To delete a fulfilment, follow these steps:

1. From the Fulfilment Server home page, click **DELETE** for the fulfilment that you want to delete. The **Confirm Delete** dialog box appears.

2. Click **DELETE**.

2.9 Managing Fulfilment Actions

To manage the actions that Syntelate XA should perform against records returned by your SQL Select statement, use the **Fulfilment actions** section of the **Fulfilment details** page.

2.9.1 Adding a Fulfilment Action

To add a fulfilment action, follow these steps:

1. In the **Fulfilment actions** section, click +. The **Creating fulfilment action** page is shown.

2. In the **Sequence** box, type the sequence number of the fulfilment action. For example, if Syntelate XA should perform this fulfilment action first (before any other fulfilment actions), type **1**.

   > Tip: You can also click ▲ or ▼ to change the sequence number. Alternatively, you can edit the sequence from the **Fulfilment details** page, where you can see the full list of fulfilment actions.

Note: If you enter a sequence number that is already used by another fulfilment action, Syntelate Studio will automatically change the sequence number of the other fulfilment action as well as that of any other affected fulfilment actions.

3. In the **Action Name** box, type a name for the fulfilment action.

4. In the **Database name** dropdown, select the database against which the fulfilment action should be performed.

5. In the **SQL statement** box, type your SQL statement.

Tip: Under **synTelate's SQL Functions**, you can double-click a function to add it to your SQL statement. For more information, see synTelate's SQL Functions on page 15.

To check whether your SQL is valid, click **Check SQL**. A dialog box appears telling you either that your SQL is valid or else reporting an error.

6. Click .

2.9.2 Editing a Fulfilment Action

To edit a fulfilment action, follow these steps:

1. From the **Fulfilment actions** section, click for the fulfilment action that you want to edit. The **Editing fulfilment action** page is shown.
2. Edit the **Sequence**, **Action Name**, **Database name**, and/or **SQL statement** as necessary.
3. Click .

Tip: If you just want to edit the sequence number of a fulfilment action, you can do this from the **Fulfilment details** page by clicking or for the fulfilment action.

2.9.3 Deleting a Fulfilment Action

To delete a fulfilment action, follow these steps:

1. From the **Fulfilment actions** section, click for the fulfilment action that you want to delete. The **Confirm Delete** dialog box appears.
2. Click **DELETE**.

2.10 Managing Fulfilment Emails

You can configure Syntelate XA to send an automated email report to one or more email addresses whenever your fulfilment is successfully run and/or whenever your fulfilment encounters an error.

Note: For Syntelate XA to send automated emails, you must set up an SMTP Configuration on page 141.

For more information, see document *Syntelate XA - Managing Studio*.

A fulfilment is successfully run when either:

- The SQL Select statement returns one or more records and Syntelate XA performs all fulfilment actions against all records.
- The SQL Select statement returns no records.

To manage the email addresses to which automated emails should be sent, use the **Send email once fulfilment is complete** section of the **Fulfilment details** page.

2.10.1 Adding an Email Address

To add an email address, follow these steps:

1. In the **Send email once fulfilment is complete** section, click . The **Add new email address** page is shown.
2. In the **Email address** box, type the email address to which the automated email should be sent.
3. Use the check boxes to select whether the email should be sent when the fulfilment is successfully run and/or when the fulfilment encounters an error.
4. Click .

2.10.2 Editing an Email Address

To edit an email address, follow these steps:

1. In the **Send email once fulfilment is complete** section, click for the email address that you want to edit. The **Edit email address** page is shown.
2. Edit the **Email address** box and/or the check boxes as required.
3. Click .

2.10.3 Deleting an Email Address

To delete an email address, follow these steps:

1. In the **Send email once fulfilment is complete** section, click for the email address that you want to delete. The **Confirm Delete** dialog box appears.
2. Click **DELETE**.

2.11 Setting the Fulfilment Details

To set the details of a fulfilment that you've added – including the schedule and SQL Select statement – follow these steps:

1. From the fulfilment's **Fulfilment details** page, click in the **Fulfilment details** section.
2. Under **Active**, click **Yes** to make the fulfilment active or **No** to make it dormant.

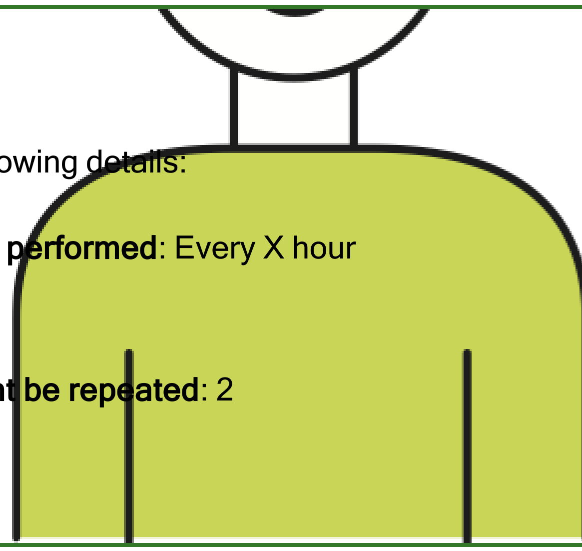
3. *(Optional)* In the **Fulfilment name** box, type a more meaningful name for your fulfilment.

4. In the **Description** box, type a description for your fulfilment.

5. In the **When should the fulfilment be performed** dropdown, select whether the fulfilment should be repeated **Every X second(s)** / **Every X minute(s)** / **Every X hour(s)** / **Every X day(s)** / **Every X week(s)**.

6. In the **How often should the fulfilment be repeated** box, type a number representing the X in the **When should the fulfilment be performed** dropdown.

EXAMPLE



For his fulfilment, Jack enters the following details:

- **When should the fulfilment be performed**: Every X hour (s)
- **How often should the fulfilment be repeated**: 2

Jack's fulfilment runs every 2 hours.

7. In the **Date** and **Time** boxes under **Schedule begins**, enter the date and time when the fulfilment should first be run.

8. *(Optional)* In the **Date** and **Time** boxes under **Schedule ends**, enter the date and time after which the fulfilment should no longer be run.

9. *(Optional)* In the **Error if number of records larger than** box, type the maximum number of records allowed in the result set of your SQL Select statement. If the result set is ever greater than this number, then an error will be thrown and the fulfilment actions will *not* be performed.

10. In the **Database name** dropdown, select the database against which the SQL Select statement should be run.

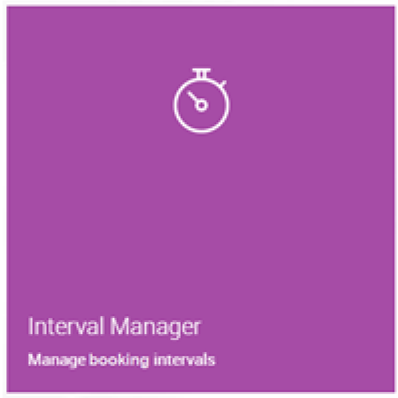
11. In the **Select statement** box, type your SQL Select statement.

> **Tip:** Under **synTelate's SQL Functions**, you can double-click a function to add it to your SQL Select statement. For more information, see synTelate's SQL Functions on page 15.
>
> To check whether your SQL is valid, click **Check SQL**. A dialog box appears telling you either that your SQL is valid or else reporting an error.

12. Click .

3. 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

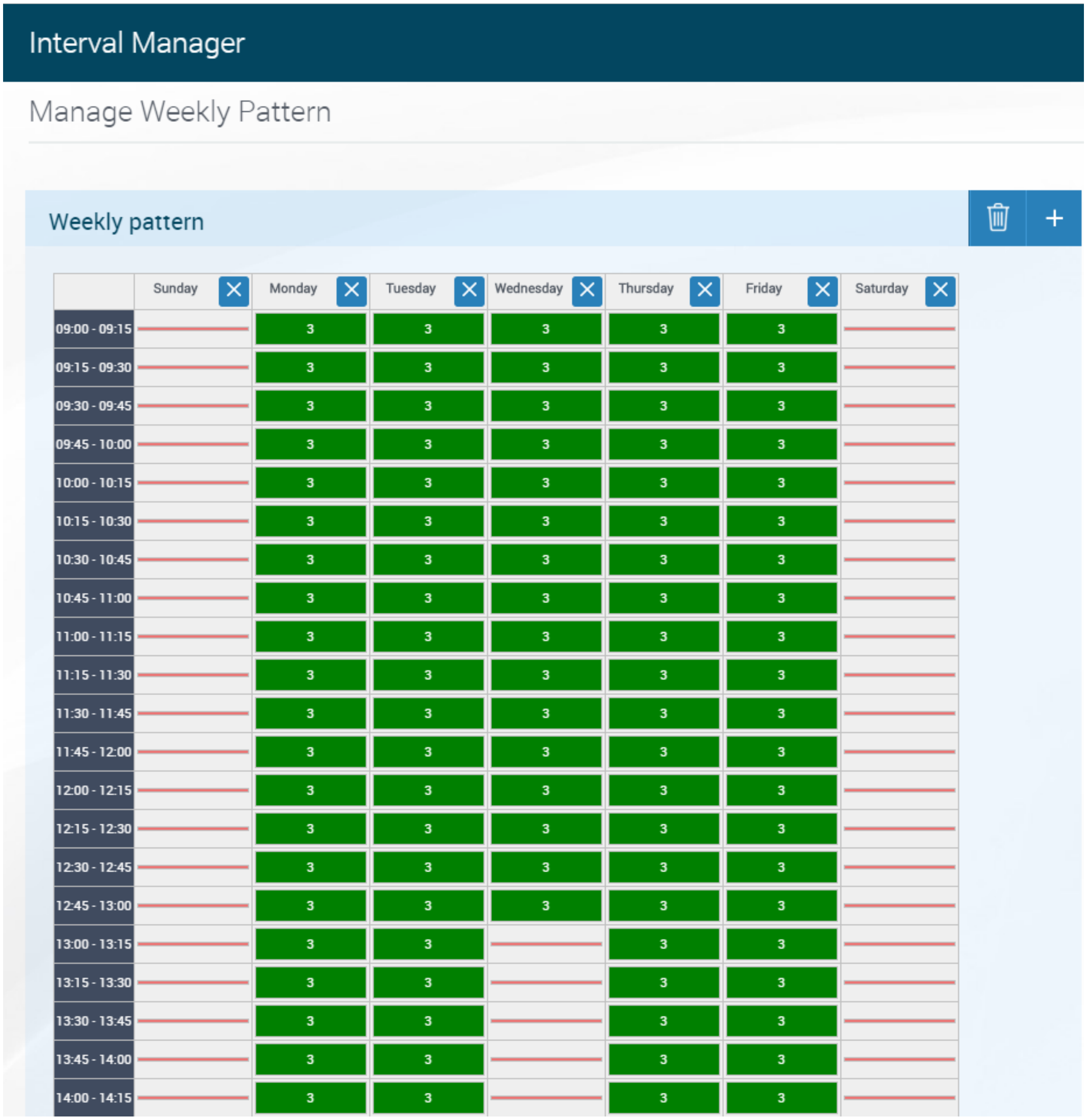
Inisoft Travel created a booking system using **Interval Manager** to help the business manage callbacks effectively. The system is embedded into their website to provide a self-service facility for customers. Meanwhile, Inisoft Travel agents also have access to the system, from their desktop and the 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.

3.1 Concepts



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:

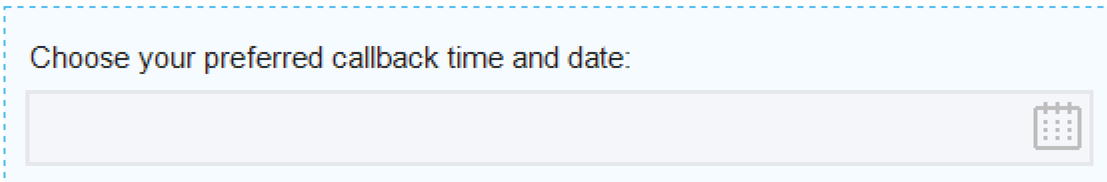
- **A weekly pattern:** Defines the intervals in a typical week, for example:
    - Fifteen-minute intervals for Monday to Friday, from 9:00 AM to 6:00 PM; four tasks per interval.
    - Fifteen-minute intervals for Saturdays, from 10:00 AM to 4:00 PM; four tasks per interval.
    - No intervals on Sundays.
- **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.

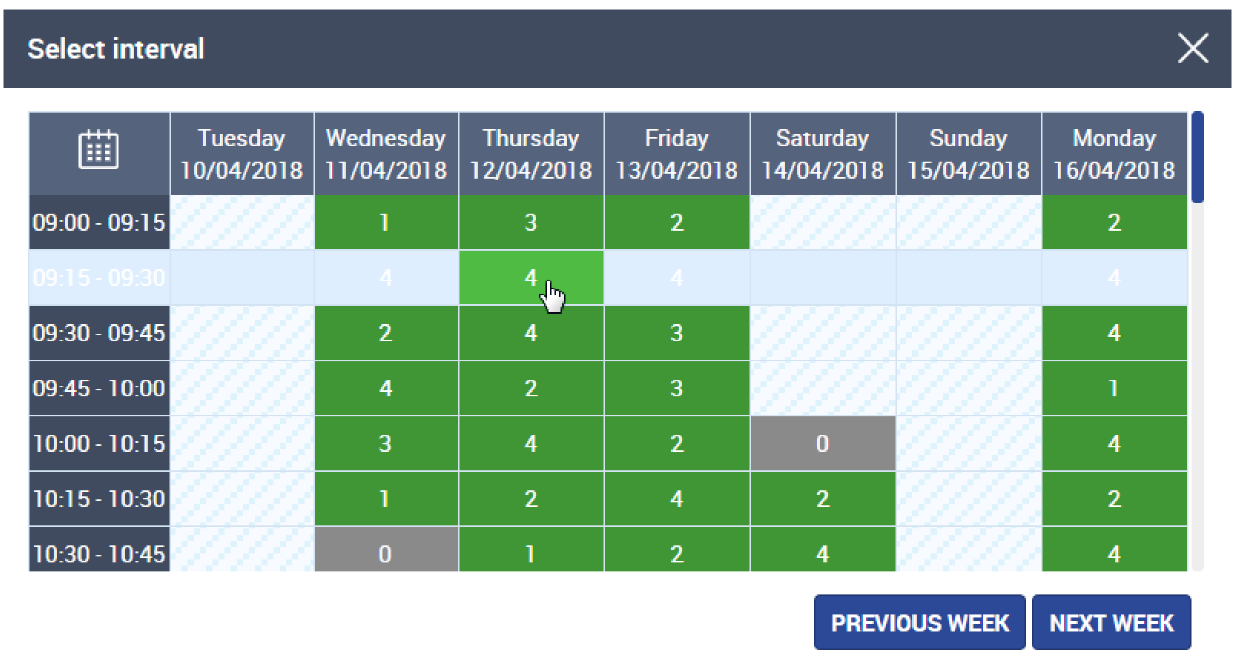
3.1.1 Self-service booking system

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:

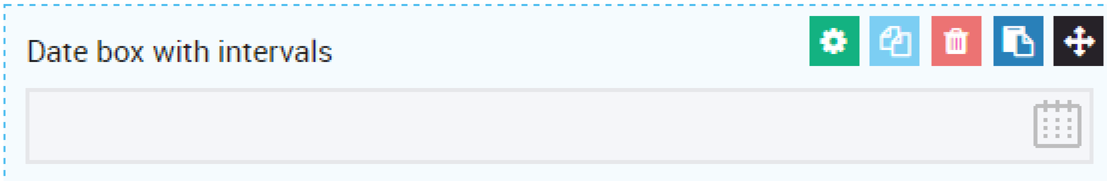


When a customer clicks the text box, the interval group that you have defined will appear on the screen.



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.

3.2 Tasks

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

3.3 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.

3.3.1 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 on page 38
- Managing Overrides on page 34
- Managing Holidays below

3.4 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 34.

3.4.1 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 .

3.4.2 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 .

3.4.3 Deleting a Holiday

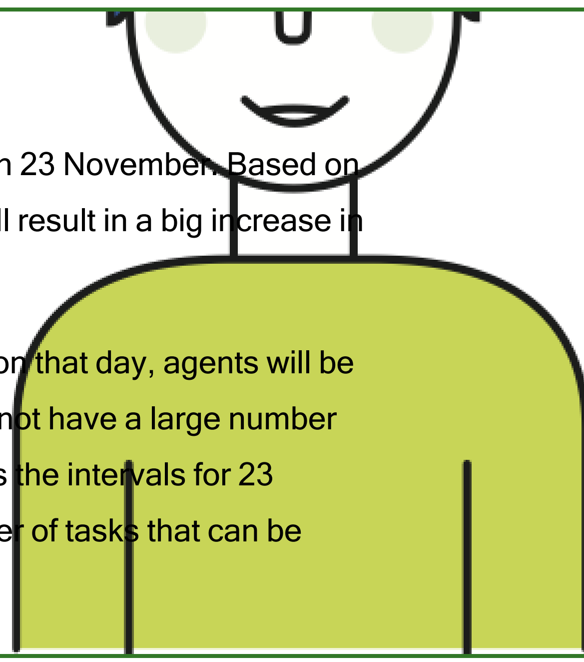
To delete an individual holiday date, follow these steps:

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**.

3.5 Managing Overrides

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

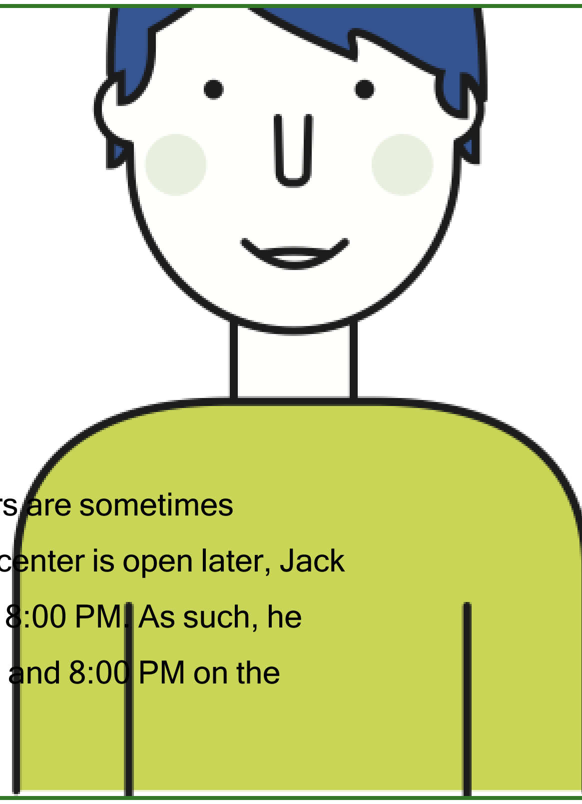
EXAMPLE



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:

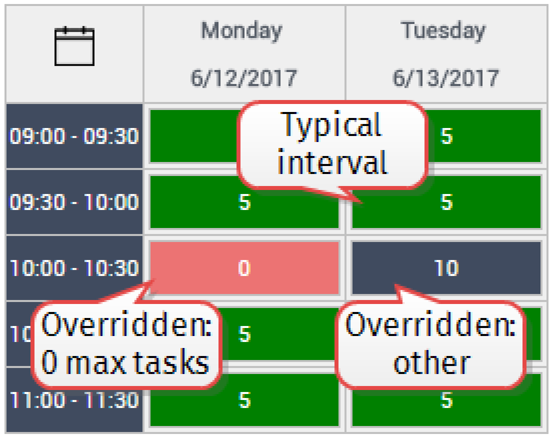
- Monday-Friday 8:00 AM to 8:00 PM
- Saturday 9:00 AM to 5:00 PM
- Sunday closed

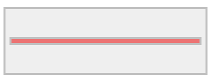
At busy periods, the Saturday opening hours are sometimes extended to 8:00 PM. On days that the call center is open later, Jack wants agents to be able to book tasks up to 8:00 PM. As such, he overrides the empty slots between 5:00 PM and 8:00 PM on the affected Saturdays.

3.5.1 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



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

3.5.2 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.

3.5.3 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.

3.6 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

3.6.1 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 [search icon] for the interval group that you wish to edit. The **<Interval Group Description>** page is shown.

2. In the **Weekly pattern** section, click [edit icon]. 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. In the **Max agents on tasks** box, type the maximum number of agents who should be able to work on tasks in a typical interval (as opposed to dealing with other types of work, such as inbound calls).

10. Syntelate XA will prompt agents to move to working on tasks when a set number of agents are idle (not dealing with other types of work, such as inbound calls). In the **Max idle agents** box, type the number of idle agents that should trigger the prompt to work on tasks.

11. Syntelate XA will prompt agents to stop working on tasks when only a set number of agents are idle. In the **Min idle agents** box, type the number of idle agents that should trigger the prompt to stop working on tasks.

12. 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.

3.6.2 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 34.

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 .

3.6.3 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**.

3.6.4 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**.

3.7 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.

4. Introduction to Studio

This section provides an introduction to Syntelate Studio.

4.1 Tiles

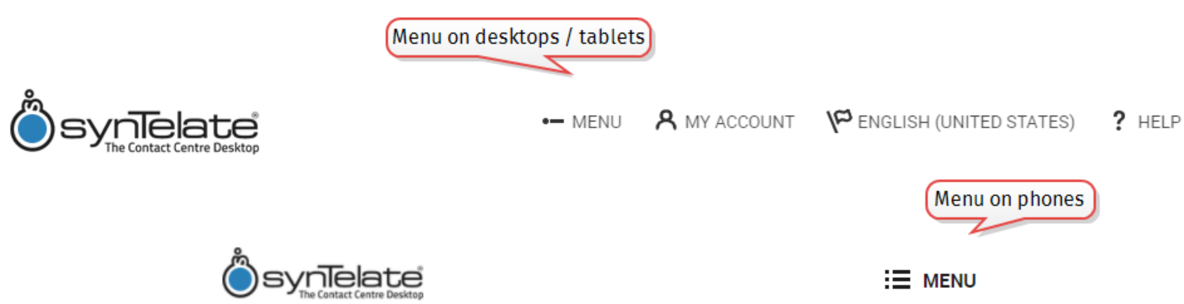
Syntelate Studio consists of various tiles, each of which lets you configure one aspect of Syntelate XA.

The tiles that you can access, and whether you have full access or read only access to these, depends on the **roles** that you have been granted and how your **tile security** has been configured.

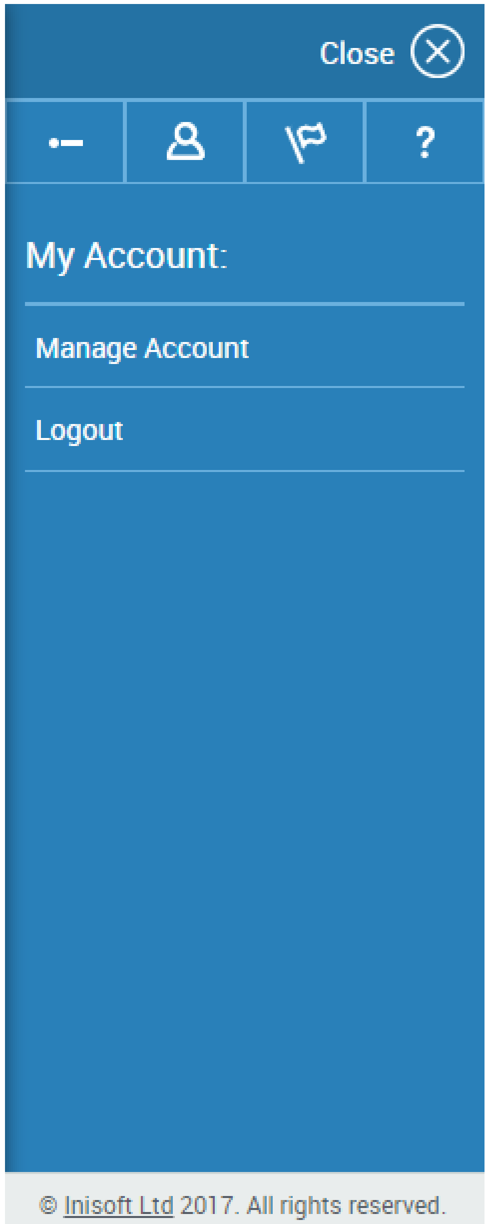
The Syntelate Studio home page displays the tiles to which you have access. Click a tile to access it.

4.2 The Menu

At the top of every Syntelate Studio page is the following menu:



Click an option in this menu to show the side menu:



Tip: From any page of Syntelate Studio, click the logo at the top-left to return to the Syntelate Studio home page.

4.3 Active vs Dormant

Throughout Syntelate Studio, the concept of something being active or dormant is used. For example:

- An **active** Syntelate Studio user is one who can log in to Syntelate Studio.
- A **dormant** user is one whose account has been disabled and who cannot log in to Syntelate Studio.

4.4 Tasks

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

4.5 Changing Your Password

You can change your password while logged in to Syntelate Studio, or you can reset it from the login page if you have forgotten it.

4.5.1 Changing Your Password While Logged In

To change your password while logged in to Syntelate Studio, follow these steps:

1. From any Syntelate Studio page, either:
   a. Click MY ACCOUNT.
   b. Click MENU, and then click .

2. Click **Manage Account**. The **Manage Account** section is shown.

3. Click **CHANGE MY PASSWORD**. The **Change Password** section is shown.

4. In the **Current Password** box, type your current password.

5. In the **New Password** and **Confirm New Password** boxes, type your new password.

> **Note:** Passwords must be at least 8 characters long and contain:
>
> - An uppercase character
> - A lowercase character
> - A number
> - A non-numeric character

6. Click **CHANGE PASSWORD**.

4.5.2 Resetting a Forgotten Password

Forgotten your password? To reset it, follow these steps:

1. From the Syntelate Studio login page, click **Forgot password?**. The **Forgot password?** page is shown.

2. Enter your username, security question and answer, and your new password.

> **Note:** Passwords must be at least 8 characters long and contain:
>
> - An uppercase character
> - A lowercase character
> - A number
> - A non-numeric character

3. Click **RESET PASSWORD**.

> **Note:** If you can’t remember your security question and answer, then you won’t be able to log in this way. However, anyone in your company who has full access to the **User Configuration** tile will be able to reset your password for you.

4.6 Filtering

Throughout Syntelate Studio, whenever you encounter a list of records, this will usually be preceded by a **Filter** box. For example, on the home page of the Fulfilment Server tile, a **Filter** box precedes the list of fulfilments.

To quickly find the record or records that you’re interested in, start typing in the **Filter** box. Any non-matching records are hidden as you type.

4.7 Logging In

To log in to Syntelate Studio, follow these steps:

1. In your browser, visit the URL for your Syntelate Studio installation.

2. Enter your username and password, and then click **SIGN IN**.

On your first login, Syntelate Studio will prompt you to enter a security question and answer. If you ever forget your password, you will need these to reset your password.

> **Note:** The first time that someone in your company logs in to Syntelate Studio, they should do so as the **super user**. They can then use the **User Configuration** tile to create the other users that you'll need.
>
> For more information, see The Super User on page 165.

4.8 Logging Out

To log out of Syntelate Studio, follow these steps:

1. From any Syntelate Studio page, either:

   a. Click MY ACCOUNT.

   b. Click MENU, and then click .

2. Click **Logout**.

4.9 Navigating

From the Syntelate Studio home page, click a tile to access that tile. Within the tile, use the buttons on each page to add a new record, to go back, and so on.

Additionally, you can view a list of links relevant to the current page. To do this, from any Syntelate Studio page, either:

- Click •— MENU.
- Click ☰ **MENU**, and then click •—.

> **Tip:** To return to the Syntelate Studio home page from any page, click the icon in the top-left.

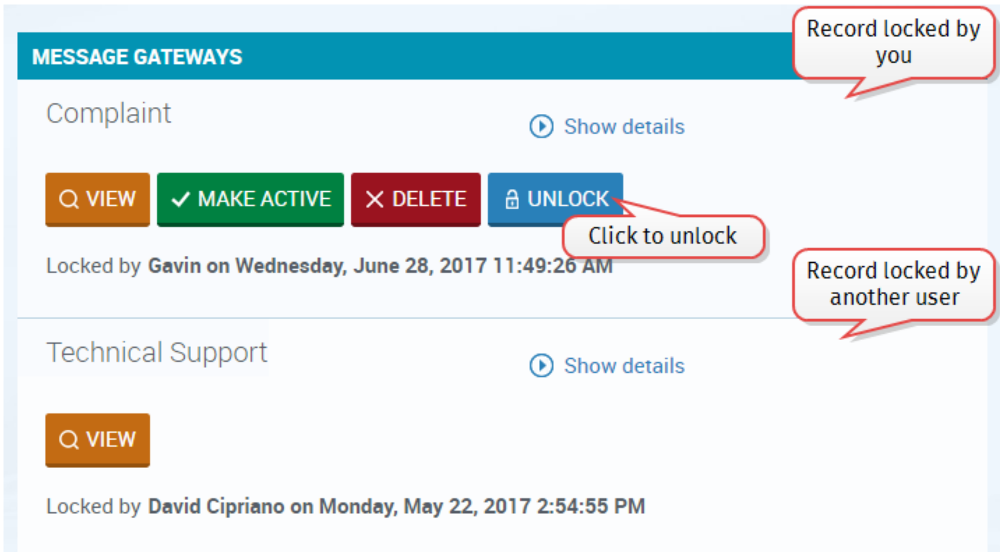
4.10 Unlocking Records

In many tiles, Syntelate Studio locks a record to you whenever you start to edit it. This is to prevent two users from editing the same record at the same time.

With tiles that use record locking, only two users can unlock a record:

- The user who locked the record
- The super user

Records locked by other users are read only. As such, you'll only see a **VIEW** button on such records:



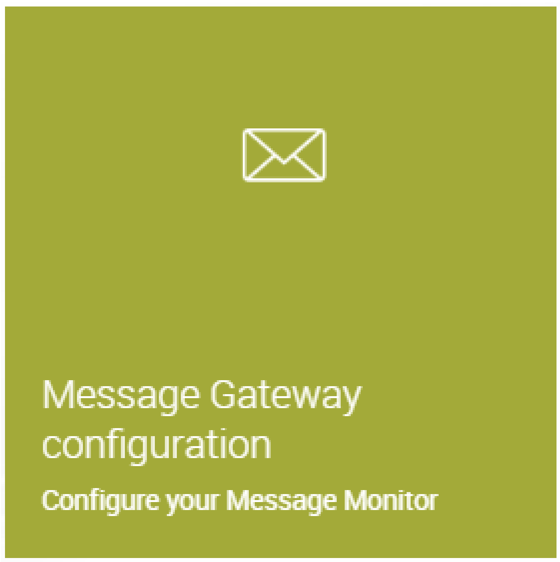
To unlock a record, simply save and close it when you're finished editing it.

If you don't do this (but instead, for example, return to the Syntelate Studio home page by clicking the icon in the top-left), the record will remain locked to you. In this case, to unlock it, click the **UNLOCK** button in the list of records.

5. Message Gateways Configuration

5.1 Overview

This section explains what a message gateway in Syntelate XA is and tells you how to use **Message Gateway configuration** in Syntelate Studio to create and manage your message gateways.



A **message gateway** is a connection between Syntelate XA and a message-based communication service, such as an email server, a social media messaging platform, or an SMS provider.

For web chat, the message gateway is the connection between the Syntelate XA web chat widget on your website and the chat element on the Syntelate XA Agent Desktop.

It's important to know that web chat is part of Syntelate XA, whereas chat bots, email, social media messaging, and SMS are delivered using integrations with third-party services.

A **message gateway** allows messages sent via those services to be added to the INTERACTION_X table, which in turn allows them to be picked up by the Worklist Engine for passing to agents. And, once the messages are in the INTERACTION_X table, they can be included in reporting.

5.2 Email Message Gateways

The primary purpose of email message gateways is to create an email channel in Syntelate XA.

Their other purpose is to enable a web chat channel to send customers a copy of their chat transcript.

Using Message Gateway configuration, you can create email message gateways for Microsoft Exchange and Office 365 mailboxes.

If you want to integrate other email services with Syntelate XA, see the document *Syntelate XA - Overview of Channels* for advice.

To integrate Microsoft Exchange or Office 365 with Syntelate XA, you need to configure one message gateway for each **mailbox** that you want to connect to.

See Email Message Gateways on page 57 for instructions.

5.3 SMS Message Gateways

SMS functionality is provided by third-party services, which you integrate with Syntelate XA by configuring an SMS message gateway. The resultant SMS message gateway acts as an SMS channel in Syntelate XA

There are two types of SMS channel in Syntelate XA: SMS outbound and SMS chat. You can create both types of SMS channel or just one.

Either way, you must configure one message gateway for each **phone number** from which you need to send **outbound SMS** or **SMS chat** messages.

See Outbound SMS Message Gateways on page 84 and SMS Chat Message Gateways on page 89 for instructions.

> **Note:** Because the SMS message gateway integrates a third-party SMS provider with Syntelate XA, you must already have an account with one of the supported providers in order to successfully configure the gateway. You can find a list of the supported providers in the sections 'Outbound SMS' and 'SMS Chat' in *Syntelate XA - Overview of Channels*.

5.4 Web Chat Message Gateways

For web chat, you need to create:

1. One web chat message gateway for each web chat topic you want to support (for example, Inisoft Travel supports two topics: Personal Travel and Business Travel).
2. One email message gateway for each web chat gateway that will let customers request a copy of their chat transcript by email.
3. One leave a message gateway for each web chat message gateway. (Leave a message is used when no agents are available for web chat.)

Note: You must create the **leave a message gateway** before the **web chat message gateway** because the web chat message gateway settings require you to specify which leave a message gateway the web chat should use.

See Leave a Message on page 79 and Web Chat Message Gateways on page 113 for instructions.

5.5 Social Media Message Gateways

Syntelate XA currently supports the following social media messaging platforms:

- Facebook Messenger: You'll need one gateway for each **Facebook page** that you will use Facebook Messenger on.
- WhatsApp: You'll need one gateway for each **WhatsApp phone number** that you will use to send messages to customers.

See Social Media Message Gateways on page 98 for instructions.

Tip: For a general description of the various non-voice channels, refer to the document *Syntelate XA - Overview of Channels*.

5.6 Email Message Gateways

This section provides instructions for using the **Message Gateway configuration** tool to integrate Syntelate XA with a Microsoft Exchange email account.

For help setting up other email services, see the section, 'Email' in Syntelate XA - Overview of Channels.

5.6.1 Adding an Email Message Gateway

There are two ways to add a new email gateway:

- Copy an existing email message gateway.
- Add a new email message gateway from scratch.

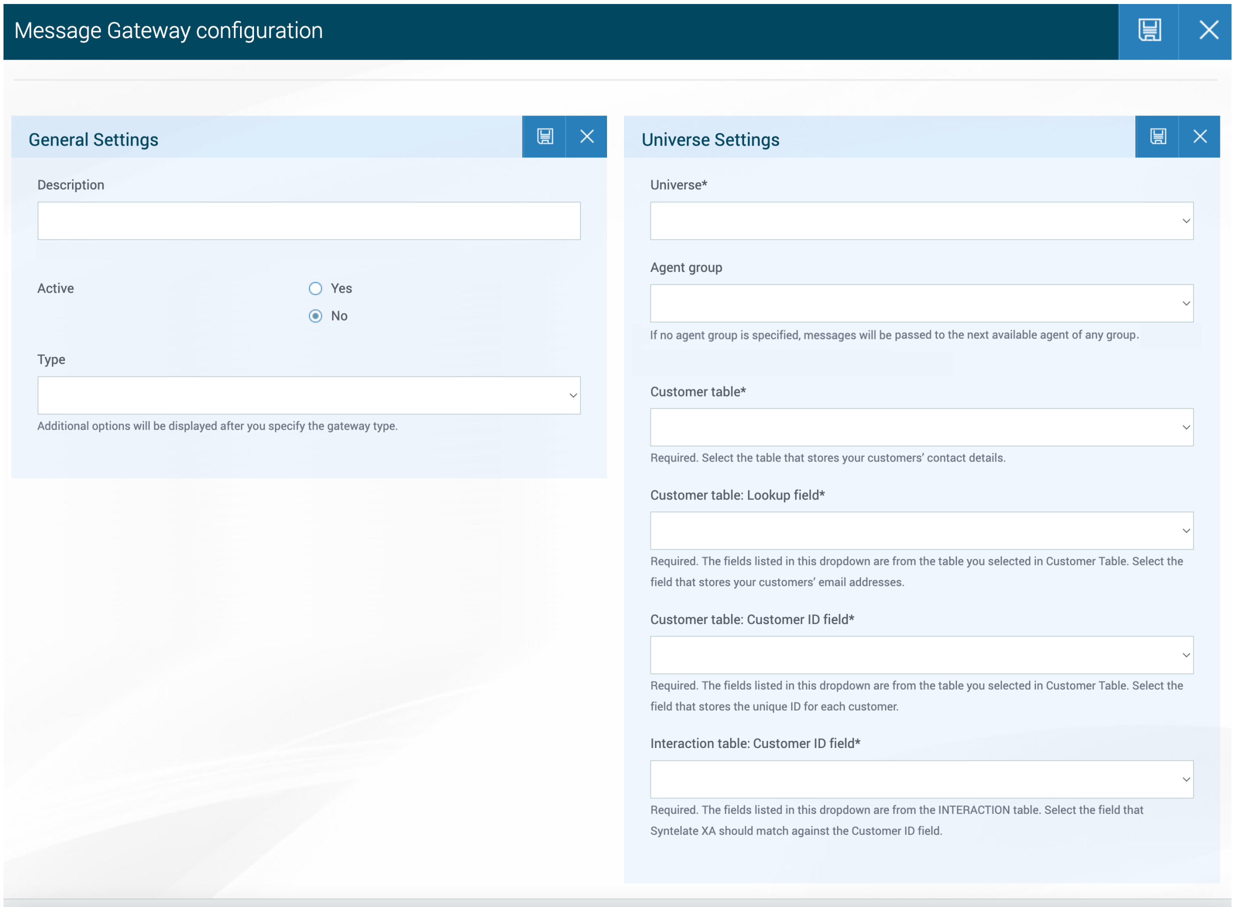
5.6.1.1 Add the Gateway

1. In Studio, go to **Message Gateway configuration**. You see a list of universes. Each universe has an Edit Message Gateway button.

   Note: The list of universes is restricted by your Studio user ID and role. This means you can only see the universes that you have been assigned to.

2. Choose Edit Message Gateway for your preferred universe. You see the message gateways index page, listing all the existing gateways in this universe.

3. From the toolbar, add + a new gateway. You see the Message Gateway settings page.



The settings are organized into two sections: **General Settings** and **Universe Settings**. Follow the steps below to get started with editing the **General Settings**.

5.6.1.2 Edit the General Settings

1. In **Description** (Required), enter a brief description that will let you easily identify the email gateway; for example, Customer Services.

2. From **Type of message gateway**, select **Email**. You see additional options.

3. For **Enable reporting**, choose **Yes** if you use dashboards to report on email activity.

4. In **Email account**, enter the email address that this gateway should connect to in order to receive and send emails inSyntelate XA. For example, `customer.services@yourcompany.com`.

5. **Exchange server** is only required for gateways to a Microsoft Exchange mailbox. In this field, enter the full, absolute path to your Exchange server.

   - For Exchange mailboxes, you also need to enter your mailbox password:

      a. Click **SET PASSWORD**. The **Change Password** dialog box appears.

      b. Enter your password in the **New Password** and **Confirm Password** boxes.

      c. Click **CONFIRM**.

6. **Destination** is only required for gateways to Microsoft Office 365 or other email services. For a Microsoft Office 365 mailbox, the destination should be entered as **Office365**. (In sentence case and without spaces.)

> Tip: **Destination** is space and case sensitive.

7. *(Optional)* In the **Path to attachments** box, type the path in your file system where customer email attachments should be saved. Leave it blank if you want to disable attachments.

8. **Access token** is only required for gateways to Office 365. Enter the application client ID for your Microsoft Graph API.

9. **Access token secret** is only required for gateways to Office 365. Enter the authorization code for your Microsoft Graph API.

10. **Consumer key** is only required for gateways to Office 365. Enter the tenant ID for your Microsoft Graph API.

11. **Consumer secret** is only required for Office 365 gateways. Enter the consumer secret for your Microsoft Graph API.

12. *(Optional)* **Completion link HTML** is a feature that lets you use HTML to provide an email completion button instead of the Syntelate XA completion button. Enter the HTML code.

13. In **Maximum file size for attachments**, enter a file size limit in KB format, for example, 1024.

    > **Tip:** 1024 KB is 1 MB.

14. In **No email before this date**, enter a date in YYYY-MM-DD format (ISO 8601). Only emails that were received on or after the date specified here will be retrieved from the email account's inbox. If you don't specify a date, then all emails will be retrieved.

15. **Check Data URL** lets you call an API to retrieve customer email details. Enter the full URL you want to call.

16. In **Check Data Request JSON**, enter the JSON key value pairs that you want to pass to the **Check Data URL**.

17. If you select **Route records to the same agent?**, when a customer sends a message, they will deal with the same agent who handled their previous message.

18. Use **Route to last agent window** when you choose **Route records to the same agent** so that Syntelate XA knows which emails will be eligible for routing to the same agent. Enter the number of minutes as a whole number, for example, **30**. New messages will be considered for routing to the same agent only if the new message is received by Syntelate XA within the window of time you specify here.

19. For **Store plain text?**, choose **Yes** if you want Syntelate XA to store a copy of the email transcripts in plain text format. Use this only if you need to export email transcripts from Syntelate XA to import them into an external application.

Next, edit the Universe Settings.

5.6.1.3 Edit the Universe Settings

1. From **Universe**, select the universe that this gateway should be added to.

2. From **Agent group**, select the agent group that will reply to emails sent to this mailbox.

   > **Note:** In Syntelate XA there is a one-to-one relationship between mailboxes and agent groups. This means there can be only one agent group per mailbox. Therefore, if multiple agent groups are handling email, create one email message gateway for each mailbox, and then make sure each group is assigned to a separate mailbox.

3. From **Customer Table**, select the table that contains your customers' details, particularly their email addresses.

4. From **Customer table: Lookup field**, select the field in your customer details table that contains customers' email addresses.

> **Note:** When a customer sends an email, Syntelate XA matches against this field in your customer details table. If a match is found, the email is associated with that customer's record. If a match is not found, Syntelate XA creates a new record in your customer details table.

5. From **Opt Out Field**, select the field in your customer details table that flags if the customer has opted out of marketing emails.

6. From **Customer table: Customer ID field**, select the field in your customer details table that contains unique customer IDs that Syntelate XA should use to match against the INTERACTION_X table.

7. From **Interaction table: Client table ID**, select the field in the INTERACTION_X table that Syntelate XA should match against the **Customer ID Field**.

> **Note:** Your customer details table contains one record per customer. The INTERACTION_X table, on the other hand, contains one record per customer interaction (in other words, it contains one record for every web chat, phone call, and so on).
>
> Both tables must contain a column for a unique customer ID. This is the **Customer ID Field** in your customer details table and the **Client Table ID** field in the INTERACTION_X table. Syntelate XA uses this unique ID to link each customer interaction (such as a web chat or phone call) to one of your customers.

8. Save your settings . The page refreshes. It shows you the gateway's settings that you just created. It also shows you some further configuration options.

You are now ready to explore those options. See below for further guidance.

5.6.1.4 What's Next?

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

- Setting the Fields to Be Written to the Interaction Table on page 75
- Setting the Fields for New Customers on page 73

Once you're happy with how your message gateway is configured, you need to set it to active before it can be used. See Making a Message Gateway Active/Dormant on page 66.

5.7 General Tasks

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

5.7.1 Copying a Message Gateway

To set up a new message gateway that is similar to an existing message gateway, copy the existing message gateway and edit it as required.

5.7.1.1 Copying an Existing Message Gateway

To copy an existing message gateway, follow these steps:

1. From the **Message gateways for campaign** page, click **VIEW** for the message gateway that you want to copy.
2. Click . The **Save as** dialog box appears.
3. In the **Message gateway description** box, type a description of your new message gateway.
4. Fill in the **Message gateway name** / **Email account** / **SMS provider username** / **Twitter username** box.
5. Click **SAVE**.

5.7.1.2 What's Next?

Now that you've copied an existing message gateway, you'll want to customize it to meet your needs. For instructions on doing this, see the appropriate section:

- Email Message Gateways on page 57
- Outbound SMS Message Gateways on page 84
- SMS Chat Message Gateways on page 89
- Web Chat Message Gateways on page 113
- Social Media
- Leave a Message on page 79

5.7.2 Deleting a Message Gateway

If you want to disable a message gateway but think you might use it again, make it dormant. See Making a Message Gateway Active/Dormant below.

If you know you're never going to use the message gateway again, you can delete it.

To delete a message gateway, follow these steps:

1. From the **Message Gateway Configuration** home page, click **EDIT MESSAGE GATEWAYS** for the campaign containing the message gateway that you want to delete.
2. Click **DELETE** for the message gateway that you want to delete. The **Remove message gateway** dialog box appears.
3. Click **REMOVE**.

5.7.3 Making a Message Gateway Active/Dormant

By default, a new message gateway is dormant. To use it, you need to activate it.

> **Note:** You can only make a message gateway active if it contains at least one field in the **New Customer Record** section. For more information, see Setting the Fields for New Customers on page 73.

To make a message gateway active or dormant, follow these steps:

1. From the **Message Gateway Configuration** home page, click **EDIT MESSAGE GATEWAYS** for the campaign containing the message gateway that you want to edit.

2. Click **MAKE ACTIVE** / **MAKE DORMANT** for the message gateway that you want to make active/dormant.

> **Note:** You can also make a message gateway active or dormant by editing the **Active** field on the **Message Gateway** page.

5.7.4 Refreshing the Web Server

After editing a message gateway, you should immediately see your changes reflected in, for example, your web chat topic. But if not, then click the **Refresh** button on the **Message gateways for campaign** page to refresh the web server.

5.7.5 Setting the Chat Disposition Codes

A chat disposition code logs why a chat ended. For example, because the agent resolved the customer's query.

Agents must disposition a chat when they end it.

For each chat message gateway that you configure (whether SMS, social media, or web chat), you need to add the chat disposition codes.

Message Gateway configuration provides you with a list of the codes you can use as a chat disposition code. You simply need to choose the codes and save your changes. See the instructions given below.

> **Note:** Only those codes that already exist in your COMPLETION_CODES table and have the field CALLCOMPLETE set to Y will be shown in the **Chat Disposition Codes** list.

> **Tip:** You can use chat disposition codes to monitor the health of your chat channel. For example, you may want to know:
>
> - The percentage of chats that are ended because the customer's query is answered.
> - The percentage of chats that are ended because the customer is directed to another channel.

> **Warning:** You must define at least one chat disposition code for each chat gateway. Otherwise, your agents will not be able to end the chat.

5.7.5.1 Adding a Disposition Code

To add a disposition code to a chat gateway, follow these steps:

1. From the **Message gateway configuration** home page, select the universe that your gateway is in.
2. Click **VIEW** for the message gateway that you want to edit.

3. In the **Chat disposition codes** section, click . The **Add chat disposition code** page is shown.
4. In the **Code** dropdown, select a completion code.
5. Click .

5.7.5.2 Editing a Disposition Code

If you want to change a chat disposition code that you've previously added, you can edit it. To do this, follow these steps:

1. From the **Message gateway configuration** home page, select the universe that your gateway is in.
2. Click **VIEW** for the message gateway that you want to edit.
3. In the **Chat disposition codes** section, click  for the chat disposition code that you want to change. The **Edit chat disposition code** page is shown.
4. In the **Code** dropdown, select a completion code.
5. Click .

5.7.5.3 Deleting a Disposition Code

To delete a chat disposition code, follow these steps:

1. From the **Message gateway configuration** home page, select the universe that your gateway is in.
2. Click **VIEW** for the message gateway that you want to edit.
3. In the **Chat disposition codes** section, click for the chat disposition code that you want to delete. The **Confirm Delete** dialog appears.
4. Click **DELETE**.

5.7.6 Setting the Chat Messages

5.7.6.1 Overview

You can customize the messages that are automatically displayed to customers when certain events occur, such as:

- When the customer is connected to an agent.
- When the customer uploads a file.

> **Note:** This task applies to chat gateways (which includes web, SMS, and social media chats). For SMS and social media gateways, only the NOACTIVITYMESSAGE chat message is relevant.

5.7.6.2 Instructions

To edit the text of a particular message for your chat gateway, follow these steps:

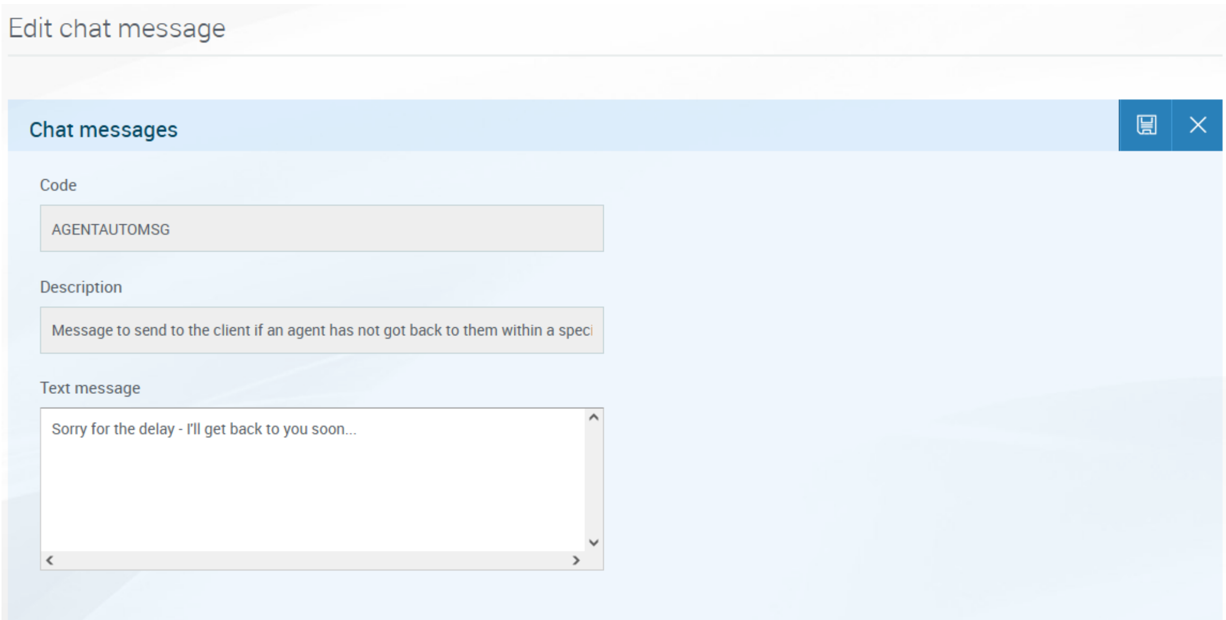
1. Log in to Syntelate Studio.
2. Click on the **Message Gateway configuration** tile:

3. Find which Universe you need to view, and click on its **EDIT MESSAGE GATEWAYS** button.

4. From the **Message gateways for campaign** page, click **VIEW** for the message gateway that you want to edit.

5. In the **Chat messages** section, click for the chat message that you want to edit.

   The **Edit chat message** page is shown.



6. In the **Text message** box, edit the text of the message.

7. Click .

Note: You define your chat message library during the requirements gathering stage of your web chat implementation. After the web chat message gateway has been implemented, Studio users can edit the content but not the code or description of the chat messages.

5.7.7 Setting the Fields for New Customers

When a customer starts an interaction such as a web chat, Syntelate XA matches the customer's details against your customer details table. If a match is found, the customer's record is retrieved. If a match is not found, Syntelate XA creates a new record in your customer details table.

You can configure the fields that Syntelate XA writes to your customer details table when it creates a new record for your message gateway.

5.7.7.1 Adding a New Field

To configure a new field to be written to your customer details table, follow these steps:

1. From the **Message gateways for campaign** page, click **VIEW** for the message gateway that you want to edit.
2. In the **New Customer Record** section, click . The **Add New Customer Record Field** page is shown.
3. Under **Field is Active**, click **Yes** to activate writing to this field or **No** to disable it.
4. In the **Field Name** dropdown, select the column in your customer details table to write to.

5. Under **Value**, click either:

    a. **Use a specified value**, to enter a specific value to use for every record

    b. **Use a pre-defined function**, to select a function

    c. **Use a database counter**, to select a database counter

6. If you selected **Use a specified value**, enter the value in the **Use a specified value** box.

7. If you selected **Use a pre-defined function**, select the function in the **Use a pre-defined function** dropdown.

8. If you selected **Use a database counter**, select the counter in the **Use a database counter** dropdown.

9. Click .

5.7.7.2 Editing a Field

To edit a field that you've previously added, follow these steps:

1. From the **Message gateways for campaign** page, click **VIEW** for the message gateway that you want to edit.

2. In the **New Customer Record** section, click  for the field that you want to edit.

    The **New Customer Record Field** page is shown.

3. Edit the field, how the field is filled, and/or whether writing to the field is active.

4. Click .

5.7.7.3 Deleting a Field

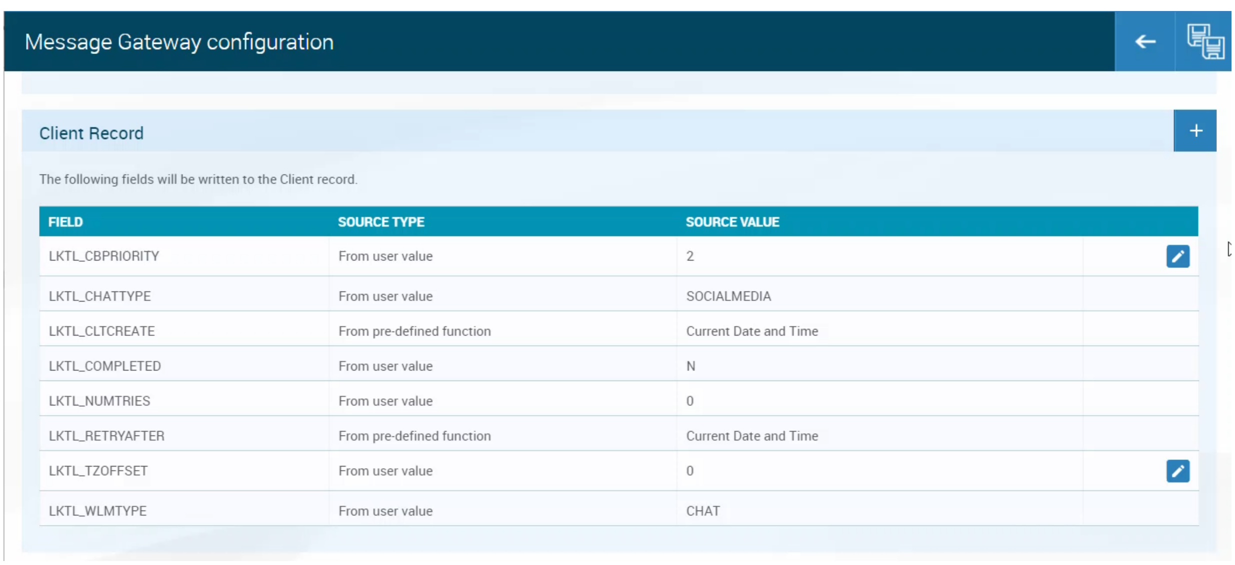
To delete a field that you've previously added, follow these steps:

1. From the **Message gateways for campaign** page, click **VIEW** for the message gateway that you want to edit.
2. In the **New Customer Record** section, click for the field that you want to delete.

   The **Remove Field** dialog box appears.
3. Click **REMOVE**.

5.7.8 Setting the Fields to Be Written to the Interaction Table

When you create a message gateway, Syntelate Studio automatically updates certain fields in your INTERACTION_X table and displays them in the **Client Record** section of your **Message Gateway configuration**.

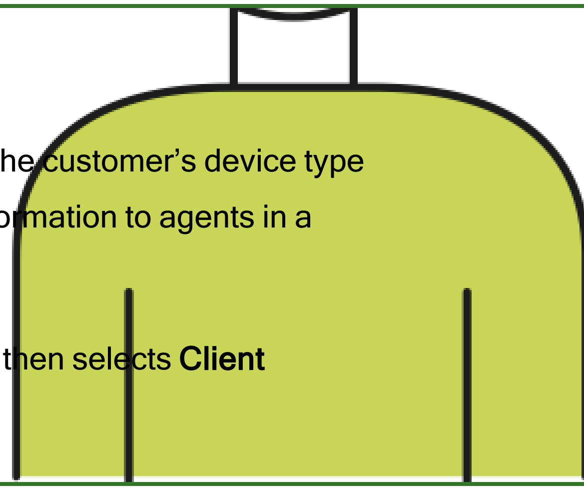


You use the **Client Record** section to manage what information Syntelate XA will write to the INTERACTION_X table when processing interactions for this message gateway. You can edit some of these fields and add new ones too.

EXAMPLE

For his web chat topic, Jack wants to write the customer's device type to a field so that he can then display this information to agents in a data entry element.

Jack clicks **From pre-defined function** and then selects **Client operating system** from the dropdown.



5.7.8.1 About the Fields

Some of the provided fields cannot be edited and are displayed to you for reference only. They relate to system processes in Syntelate XA and do not need to be changed.

However, two of the provided fields can be edited. They relate to the business requirements of the Syntelate XA implementation and will require different values for each implementation. These fields are:

Field	Description
LKTL_ CBPRIORITY	Allows you to set the priority level of interactions handled by this gateway. Accepts integers from 1 to 5, where 1 indicates the highest priority. The Worklist Engine looks at this when deciding what interaction to pass next to an agent.
LKTL_	Allows you to set the local time zone offset from Coordinated Universal

Field	Description
TZOFFSET	Time (UTC). Include a minus symbol (-) if the time zone is behind UTC, for example, -1.

To edit those fields or to add or delete others, follow the instructions below.

5.7.8.2 Editing a Field

1. In the **Client Record** section, click for the field that you want to edit. The **Client Record field** page is shown.
2. Edit the field and/or how the field is filled.
3. Click .

5.7.8.3 Adding a Field

To allow the message gateway to write an additional field to the INTERACTION_X table, follow the steps below.

Tip: For social media message gateways you must add a field called LKTL_INTERACTIONTYPE. The value of the field should be one of the following codes, entered exactly as shown:

Social media message gateway	Value for LKTL_INTERACTIONTYPE
Facebook Messenger	FB_API
WhatsApp via Sunshine Conversations	SUN_CHAT

Social media message gateway	Value for LKTL_INTERACTIONTYPE
WhatsApp via MessageBird	MSGB_CHAT

1. In the **Client Record** section, click +. The **Add Client Record field** page is shown.
2. In the **Field Name** dropdown, select the column in the INTERACTION_X table to write to.
3. Under **Value**, click **From user value** to enter a specific value to use for every record, or **From pre-defined function** to select a function.
4. If you selected **From user value**, enter the value in the **From user value** box.
5. If you selected **From pre-defined function**, select the function in the **From pre-defined function** dropdown.
6. Click .

5.7.8.4 Deleting a Field

To delete a field that you've previously added, follow these steps:

1. In the **Client Record** section, click for the field that you want to delete. The **Remove Field** dialog box appears.
2. Click **REMOVE**.

5.7.9 Shortening URLs

You can configure your SMS gateway to automatically shorten URLs (web addresses) in agent messages. The main advantages of shortened URLs are:

- Fewer characters (crucial if exceeding limits incurs a cost)
- Access to analytics gives insights into your content and market.

When URL shortening is configured, agents do not need to do anything special to use short URLs. The agent simply types the regular URL into the message box; Syntelate XA then automatically shortens the URL when the agent sends the message.

To set up URL shortening contact Inisoft Support on:

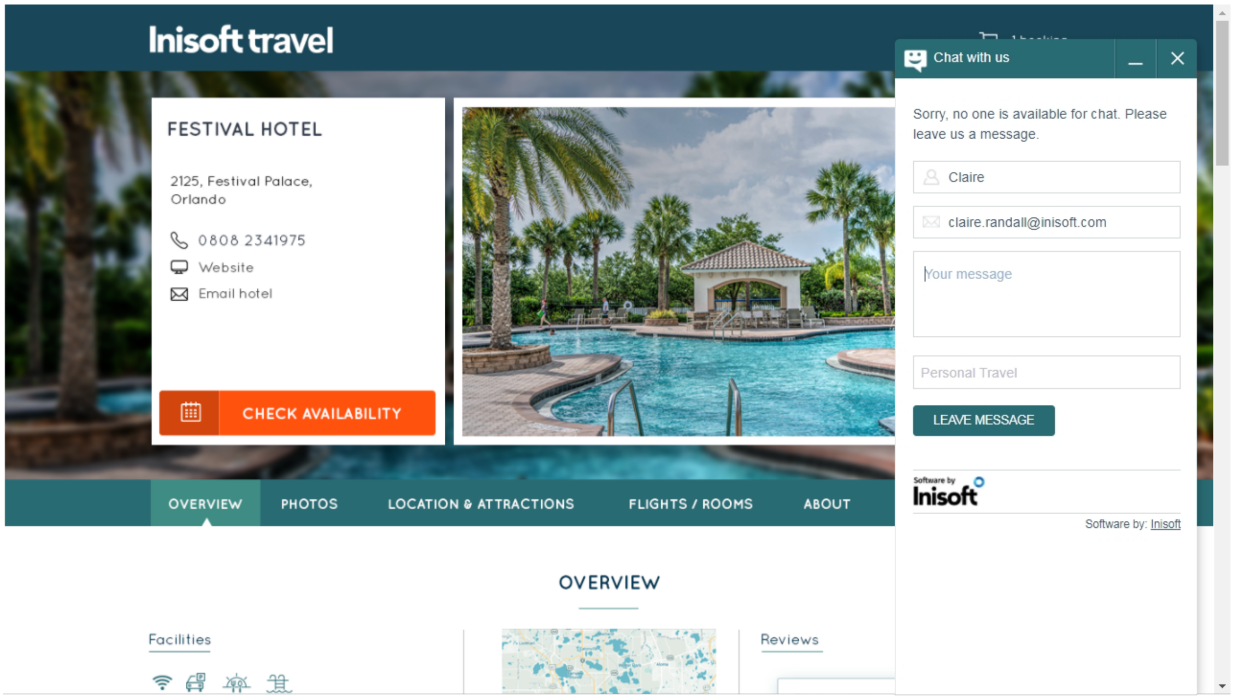
- +44 (0)800 668 1290
- support@inisoft.com.

> **Note:** If you do not want Syntelate XA to shorten URLs, leave the **URL shortening service connection** and **URL shortening service key** boxes empty.

5.8 Leave a Message

5.8.1 Overview

Leave a message prompts the customer to enter a few basic personal details and type a message. This generates a worklist email record in Syntelate XA that an agent can reply to in the same way that they would reply to an email sent directly from the customer.



To create a leave a message form, you need to create a leave a message gateway. A leave a message gateway is a collection of settings for specifying the following:

- The database that the chat and leave a message will be connected to.
- The database tables and fields to read and write the customer's contact details from and to when they submit information in the leave a message form.
- The agent group who will handle the emails sent by the leave a message form.

And, there are other important settings that are crucial for managing how the leave a message form works. Those settings are specified in the web chat message gateway and in the web chat configuration. The order in which to fully set up a leave a message is:

1. Create the leave a message gateway.

2. Create the web chat message gateway.

3. Configure the web chat in Web Chat Config. on page 172

5.8.2 Adding a Leave a Message Gateway

There are two ways to add a new leave a message gateway:

- Copy an existing leave a message gateway
- Add a new message gateway from scratch

Note: For instructions on copying a message gateway, see Copying a Message Gateway on page 64.

5.8.2.1 Configuring a Leave a Message Gateway from Scratch

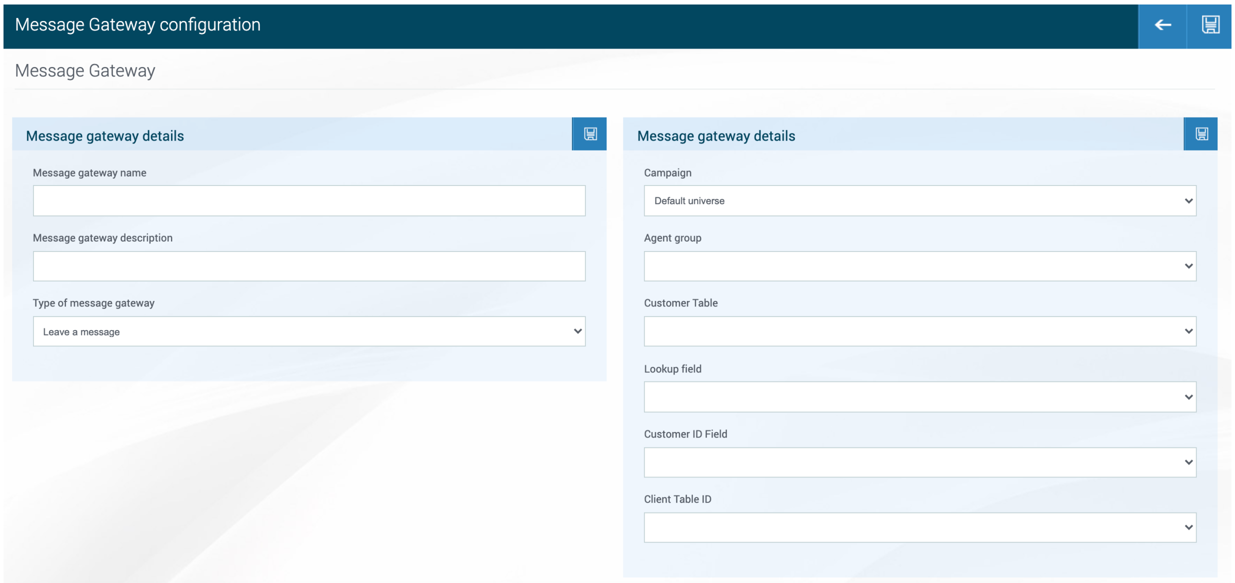
To configure a new leave a message gateway, follow these steps:

STEP 1

1. In the **Type of message gateway** dropdown, select **Leave a message**. Additional boxes relevant to this type of message gateway appear.

2. In the **Message gateway name** box, type a name for your leave a message gateway.

Note: This is for your reference only. The name will not be shown to customers or agents.



3. In the **Message gateway description** box, type a description of your leave a message gateway.

Note: This is for your reference only. The description will not be shown to customers or agents.

STEP 2

1. In the **Campaign** dropdown, select the universe to which this gateway should be added.

2. In the **Agent group** dropdown, select the agent group that will deal with these left messages.

3. In the **Customer Table** dropdown, select the table that contains your customers' details, specifically your customers' email addresses.

4. In the **Lookup field** dropdown, select the column in your customer details table that contains customers' email addresses.

> Note: When a customer leaves a message, Syntelate XA matches their email address against this field in your customer details table. If a match is not found, Syntelate XA creates a new record in your customer details table.

5. In the **Customer ID Field** dropdown, select the column in your customer details table that contains unique customer IDs that Syntelate XA should use to match against the INTERACTION_X table.

6. In the **Client Table ID** dropdown, select the column in the INTERACTION_X table that Syntelate XA should match against the **Customer ID Field**.

> Note: Your customer details table contains one record per customer. The INTERACTION_X table, on the other hand, contains one record per customer interaction (in other words, it contains one record for every web chat, phone call, and so on).
>
> Both tables must contain a column for a unique customer ID. This is the **Customer ID Field** in your customer details table and the **Client Table ID** field in the INTERACTION_X table. Syntelate XA uses this unique ID to link each customer interaction (such as a web chat or phone call) to one of your customers.

7. Click .

5.8.2.2 What's Next?

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

- Setting the Fields to Be Written to the Interaction Table on page 75
- Setting the Fields for New Customers on page 73
- Styling Leave a Message on page 198
- Configuring the subject of the email record: see Setting the Chat Messages on page 70
- Manually Activating Leave a Message on page 192
- Making a Message Gateway Active/Dormant on page 66

5.9 Outbound SMS Message Gateways

This section tells you how to create a message gateway that integrates an SMS service provider with Syntelate XA so that agents can send outbound SMS messages to customers' cell phones.

5.9.1 Adding an Outbound SMS Message Gateway

There are two ways to add an outbound SMS message gateway:

- Copy an existing outbound SMS message gateway.
- Add a new message gateway.

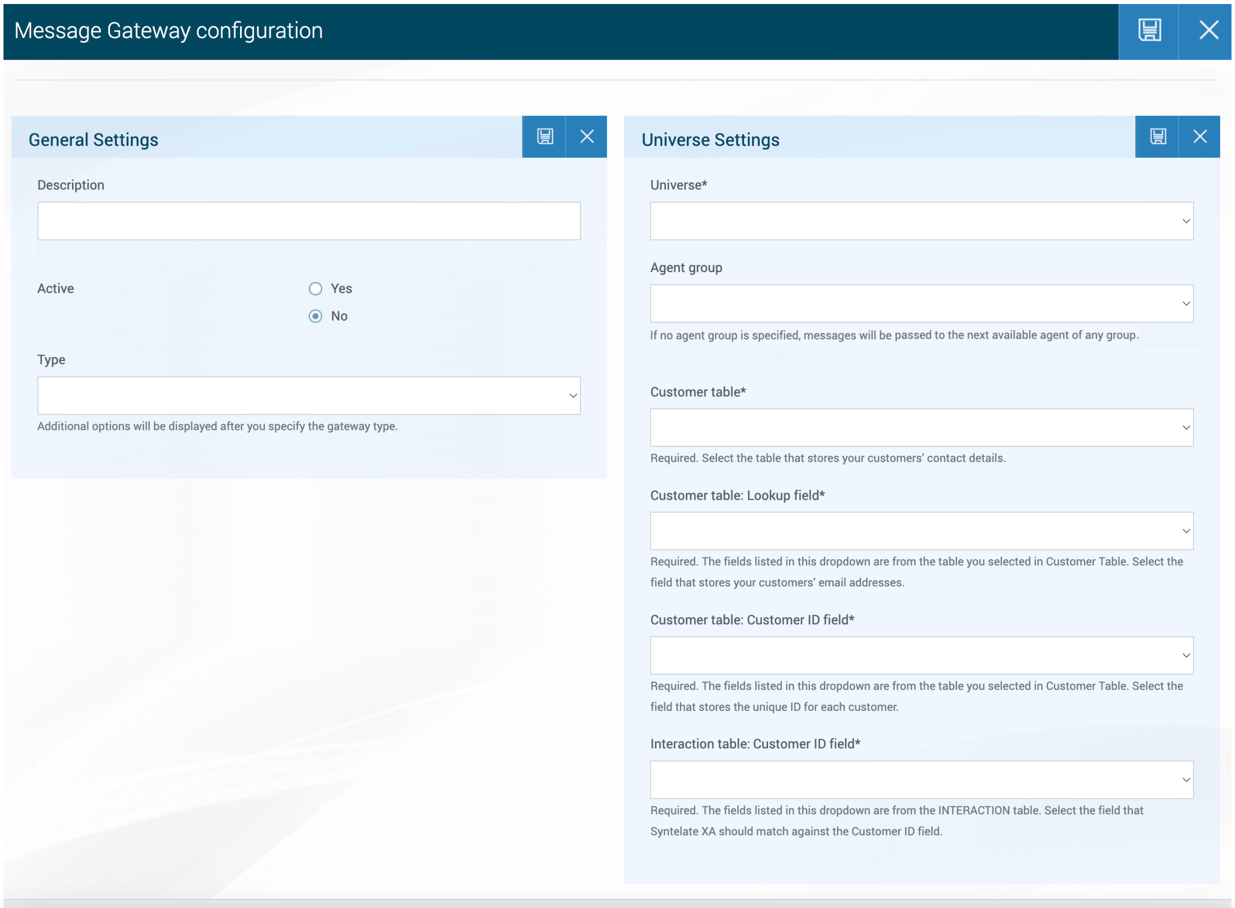
5.9.1.1 Add the Gateway

1. In Studio, go to **Message Gateway configuration**. You see a list of universes. Each universe has an Edit Message Gateway button.

   > **Note:** The list of universes is restricted by your Studio user ID and role. This means you can only see the universes that you have been assigned to.

2. Choose Edit Message Gateway for your preferred universe. You see the message gateways index page, listing all the existing gateways in this universe.

3. From the toolbar, add + a new gateway. You see the Message Gateway settings page.



The settings are organized into two sections: **General Settings** and **Universe Settings**. Follow the steps below to get started with editing the **General Settings**.

5.9.1.2 Edit the General Settings

1. In **Description**, enter a description for your outbound SMS gateway.

> **Note:** This is for your reference only. It will not be shown to customers or agents.

2. From **Type of message gateway**, select **SMS**. You see additional options.

3. In **SMS provider URL**, enter the URL of the API for your SMS service provider.

> Tip: For information about supported providers, see document *Syntelate XA - Overview of Channels*.

4. In **SMS provider key**, enter your API key.

5. In **URL shortening service connection**, enter the URL for your preferred URL shortening service.

6. In **URL shortening service key**, enter the key for your preferred URL shortening service.

7. In **Sender ID**, enter the sender ID that your URL shortening service provides you.

> Note: For information about URL shortening, see Shortening URLs on page 79.

8. For **Route records to the same agent?**, select Yes if you want a customer to be passed to the same agent who handled their previous message.

9. Use **Route to last agent window** when you choose **Route records to the same agent** so that Syntelate XA knows which messages will be eligible for routing to the same agent. New messages will be routed to the same agent only if the new message is received by Syntelate XA within the window of time you specify here. Enter a number of minutes as a whole number, for example, **30**.

10. For **Allow inbound calls?**, choose **Yes** if you want to prioritize inbound calls over SMS messages; this will result in inbound calls being allowed to interrupt agents who are handling SMS messages.

Next, edit the Universe Settings.

5.9.1.3 Edit the Universe Settings

1. From **Universe**, select the universe that this gateway should be added to.
2. From **Agent group**, select the group that will handle this SMS number.
3. From **Customer table**, select the table that contains your customers' mobile phone (cell phone) number.
4. From **Customer table: Lookup field**, select the column in your customer details table that contains customers' mobile phone (cell phone) numbers.
5. From **Lookup type**, select **Phonenumber**.
6. From **Customer table: Customer ID field**, select the column in your customer details table that contains unique customer IDs that Syntelate XA should use to match against the INTERACTION_X table.
7. From **Interaction table: Client table ID**, select the column in the INTERACTION_X table that Syntelate XA should match against the **Customer ID Field**.

> **Note:** Your customer details table contains one record per customer. The INTERACTION_X table, on the other hand, contains one record per customer interaction (in other words, it contains one record for every web chat, phone call, and so on).
>
> Both tables must contain a column for a unique customer ID. This is the **Customer ID Field** in your customer details table and the **Client Table ID**

field in the INTERACTION_X table.

8. Save your settings . The page refreshes. It shows you the gateway's settings that you just created. It also shows you some further configuration options.

You are now ready to explore those options. See below for further guidance.

5.9.1.4 What's Next?

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

- Shortening URLs on page 79
- Setting the Fields to Be Written to the Interaction Table on page 75
- Setting the Fields for New Customers on page 73

Once you're happy with how your message gateway is configured, you need to set it to active before it can be used. See Making a Message Gateway Active/Dormant on page 66.

5.10 SMS Chat Message Gateways

Using the **Message Gateway Configuration** tile, you can configure an SMS chat message gateway.

For each SMS chat message gateway, you must specify the number to which customers should send their texts (and from which agents will reply).

You can associate an SMS chat message gateway with a particular agent group, who will then deal with these SMS chats. By setting up multiple SMS chat message gateways, you can let customers get in touch about different things.

EXAMPLE

Customers can contact Inisoft Travel by sending SMS text messages from their cell phone. The number that the customer should text depends on whether they're a personal customer or a business customer.

Query Type	Phone number
Personal Travel	07700900050
Business Travel	07700900060

Here Personal Travel and Business Travel are two different SMS chat gateways.

5.10.1 Adding an SMS Chat Gateway

There are two ways to add a new SMS chat gateway:

- Copy an existing SMS chat gateway.
- Add a new message gateway.

> **Note:** Syntelate XA uses the TextMagic API for SMS chat. If you do not already have a TextMagic account, you'll need to create one before you can complete the steps below.
>
> For more information about TextMagic, see https://www.textmagic.com.

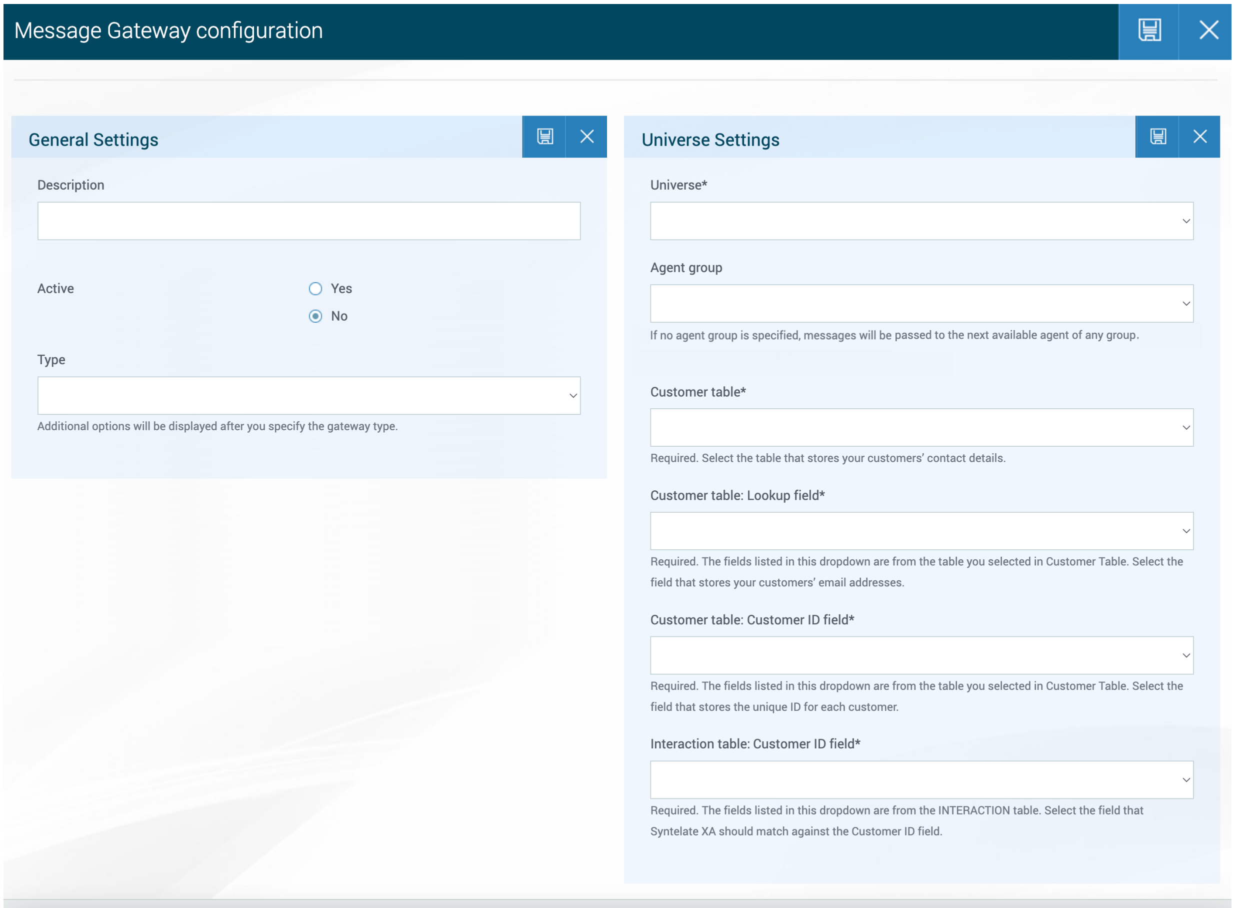
5.10.1.1 Add the Gateway

1. In Studio, go to **Message Gateway configuration**. You see a list of universes. Each universe has an Edit Message Gateway button.

   > **Note:** The list of universes is restricted by your Studio user ID and role. This means you can only see the universes that you have been assigned to.

2. Choose Edit Message Gateway for your preferred universe. You see the message gateways index page, listing all the existing gateways in this universe.

3. From the toolbar, add + a new gateway. You see the Message Gateway settings page.



The settings are organized into two sections: **General Settings** and **Universe Settings**. Follow the steps below to get started with editing the **General Settings**.

5.10.1.2 Edit the General Settings

1. In **Description**, enter a description for your SMS chat gateway.
2. From **Type of message gateway**, select **SMS - Chat**. You see additional options.
3. In **Name**, enter a name for your gateway.

4. For **Enable reporting**, select **Yes** to enable reporting for your SMS chat gateway or **No** to disable it.

> **Note:** For information about chat reporting, see document *Syntelate XA - Reporting*.

5. In **Maximum number of SMS messages**, enter the number of SMS messages that an agent can send in a single SMS chat. This should be between **1** and **6**.

Note: Using a standard GSM 03.38 character set, a single SMS message can be a maximum of 160 characters.

A long message can be split across several SMS messages. The character limit for a concatenated text message is 153 characters. A maximum of six messages can be concatenated.

Maximum number of SMS messages	Character limit
1	160
2	306
3	459
4	612
5	765
6	918

Syntelate XA will not let an agent send a message that exceeds the character count.

6. In **SMS provider username**, enter your TextMagic API username.
7. In **SMS provider URL**, enter the URL **https://rest.textmagic.com/api/v2/messages**.
8. In **SMS provider key**, enter your TextMagic API key.

9. In **Destination**, enter the phone number that customers should send their SMS messages to.

10. For **Route records to the same agent?**, select **Yes** if you want a customer to be passed to the same agent who handled their previous message.

11. Use **Route to last agent window** when you choose **Route records to the same agent** so that Syntelate XA knows which messages will be eligible for routing to the same agent. New messages will be routed to the same agent only if the new message is received by Syntelate XA within the window of time you specify here. Enter a number of minutes as a whole number, for example, **30**.

12. For **Allow inbound calls?**, choose **Yes** if you want to prioritize inbound calls over SMS chats; this will result in inbound calls being allowed to interrupt agents who are handling SMS chats.

13. Next, edit the Universe Settings.

Next, you need to configure the gateway's **Universe Settings**.

5.10.1.3 Edit the Universe Settings

1. From **Universe**, select the universe that this gateway should be added to.

2. From **Agent group**, select the group that will handle this SMS number.

3. From **Smart text group**, select the smart text group that will be available to agents handling this SMS number.

4. From **Customer Table**, select the table that contains your customers' details, specifically your customers' cell phone numbers.

5. From **Customer table: Lookup field**, select the column in your customer details table that contains customers' cell phone numbers.

> **Note:** When a customer sends an SMS message, Syntelate XA matches against this field in your customer details table. If a match is found, the customer's record is retrieved. If a match is not found, Syntelate XA creates a new record in your customer details table.

6. From **Lookup type**, select **Phonenumber**.

7. From **Customer table: Customer ID field**, select the column in your customer details table that contains unique customer IDs that Syntelate XA should use to match against the INTERACTION_X table.

8. From **Interaction table: Client table ID**, select the column in the INTERACTION_X table that Syntelate XA should match against the **Customer ID Field**.

> **Note:** Your customer details table contains one record per customer. The INTERACTION_X table, on the other hand, contains one record per customer interaction (in other words, it contains one record for every SMS chat, phone call, and so on).
>
> Both tables must contain a column for a unique customer ID. This is the **Customer ID Field** in your customer details table and the **Client Table ID** field in the INTERACTION_X table. Syntelate XA uses this unique ID to link each customer interaction (such as an SMS chat or phone call) to one of your customers.

9. In **Timer for end chat prompt**, enter a number of minutes as a whole number. If a customer hasn't sent a message by the time specified here, Syntelate XA sends the agent the NOACTIVITYMESSAGE to prompt them to end the chat. Alternatively, enter **0** to disable the message.

> **Note:** This message could be something like *Please disposition this chat. It has been inactive for a long time.* You can use whatever text you like for this message. For instructions on how to customize it, see Setting the Chat Messages on page 70. This is the NOACTIVITYMESSAGE message.

> **Note:** Due to the nature of SMS exchanges, a customer may well send a message after a period of inactivity. By this point, the agent may already have ended the chat. When this happens, the new message will cause a new chat to pop, possibly to a different agent.
>
> From the customer's perspective, they will be continuing an existing conversation, but from an agent's perspective, this is a new conversation. For this reason, we recommend that you design your agent desktop to make it easy for agents to see past interactions with the customer, including recent SMS chats.
>
> This way, the agent will be able to read the recent chat and seamlessly continue the conversation with the customer.

10. Save your settings . The page refreshes. It shows you the gateway's settings that you just created. It also shows you some further configuration options.

You are now ready to explore those options. See below for further guidance.

5.10.1.4 What’s Next?

You’ve now added a basic SMS chat gateway, but there’s still more to do! See the following tasks:

- Shortening URLs on page 79
- Setting the Chat Disposition Codes on page 67
- Setting the Chat Messages on page 70
- Setting the Fields to Be Written to the Interaction Table on page 75
- Setting the Fields for New Customers on page 73

Once you’re happy with how your message gateway is configured, you need to set it to active before it can be used. See Making a Message Gateway Active/Dormant on page 66.

5.11 Social Media Message Gateways

5.11.1 Overview

This section provides instructions for using **Message Gateway configuration** to create a social media channel in Syntelate XA.

Syntelate XA supports the following social media channels:

- Facebook
- WhatsApp

The process of creating a social media channel involves up to three stages:

1. Outside of Syntelate XA: Configuring your business's social media account to be ready to connect to Syntelate XA. See Prerequisites below for more guidance.

2. In Syntelate XA: (Optional) Setting up a smart text group for your agents to use when chatting over the social media channel.

3. In Syntelate XA: Creating a social media message gateway.

5.11.2 Prerequisites

To configure your business's social media account to be ready to connect to Syntelate XA, you need to create a Syntelate XA app in your business's social media account.

Usually, creating the app involves the following tasks:

1. Registering for a developer account with the social media platform – or, in the case of WhatsApp, you sign up for a developer account with a WhatsApp Business solution provider.

2. Creating a Syntelate XA app in your developer account.

3. Configuring your developer account's Syntelate XA app to integrate with Syntelate XA's chat API.

Because those tasks are subject to the third-party platform's requirements and are frequently revised, we do not document them here. You can find documentation on the third party's website.

However, your Inisoft consultant can either provide you with the information you need to complete those tasks or do them on your behalf.

5.11.2.1 Creating a Smart Text Group

Before setting up the social media message gateway, you might wish to set up a smart text group that your agents can use when chatting to customers on the social media channel. You set up smart text groups in Studio's Smart Text Editor. See Smart Text Editor on page 125 for information.

5.11.3 Ready to Start?

A social media message gateway is easy to set up and the process takes just a few minutes. Follow the instructions in Tasks to get started.

5.11.4 Tasks

Click a task for step-by-step instructions:

Adding a Facebook Gateway 100
Adding a WhatsApp Gateway 106

5.11.5 Adding a Facebook Gateway

There are two ways to add a new Facebook gateway:

- Copy an existing Facebook gateway.
- Add a new gateway.

> **Note:** Before you can set up a social media message gateway, your company must have its own social media third-party app.
>
> We can create the app for you or help you create it. See Social Media Message Gateways.

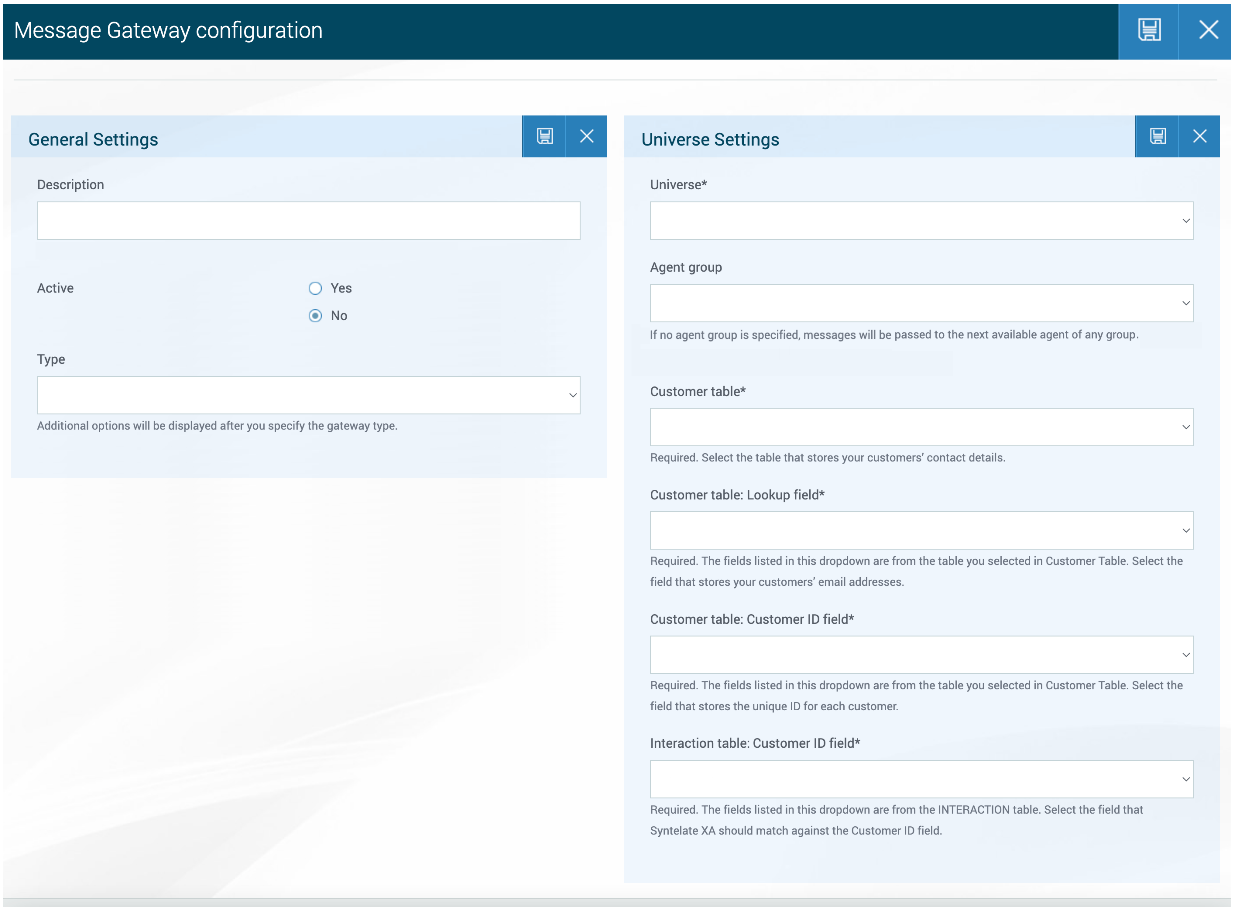
5.11.5.1 Add the Gateway

1. In Studio, go to **Message Gateway configuration**. You see a list of universes. Each universe has an Edit Message Gateway button.

   > **Note:** The list of universes is restricted by your Studio user ID and role. This means you can only see the universes that you have been assigned to.

2. Choose Edit Message Gateway for your preferred universe. You see the message gateways index page, listing all the existing gateways in this universe.

3. From the toolbar, add + a new gateway. You see the Message Gateway settings page.



The settings are organized into two sections: **General Settings** and **Universe Settings**.

Follow the steps below to get started with editing the **General Settings**.

5.11.5.2 Edit the General Settings

1. In **Description**, enter a description for your Facebook gateway.

> **Note:** This description will be shown to agents at the top of each Facebook chat. It should indicate what the Facebook chat is about, for example **Personal Travel** or **Business Travel**.

2. From **Type of message gateway**, select **Social Media**. You see additional boxes.

3. In **Name**, enter a name for your gateway.

4. For **Enable reporting**, select **Yes** to enable reporting for your Facebook gateway or **No** to disable it.

> **Note:** For information about chat reporting, see document *Syntelate XA - Reporting*.

5. In the **Destination** box, In **Destination**, you need to enter the code used by Syntelate XA to connect to the Facebook API. Enter **FBAPI**.

6. In **Maximum file size for attachments**, enter a file size limit in KB format, for example, 1024.

> **Tip:** 1024 KB is 1 MB.

7. For **Route records to the same agent?**, select **Yes** if you want a customer to be passed to the same agent who handled their previous message.

8. Use **Route to last agent window** when you choose **Route records to the same agent** so that Syntelate XA knows which messages will be eligible for routing to the same agent. New messages will be routed to the same agent only if the new message is received by Syntelate XA within the window of time you specify here. Enter a number of minutes as a whole number, for example, **30**.

9. For **Allow inbound calls?**, choose **Yes** if you want to prioritize inbound calls over Facebook Messenger chats; this will result in inbound calls being allowed to interrupt agents who are handling Facebook Messenger chats.

Next, you need to configure the gateway's **Universe Settings**.

5.11.5.3 Edit the Universe Settings

1. From **Universe**, select the universe that this gateway should be added to.

2. From **Agent group**, select the agent group that will handle this Facebook Messenger account.

3. From **Smart text group**, select the smart text group that will be available to agents handling this Facebook Messenger account.

4. From **Customer table**, select the table that contains your customers' details, specifically your customers' Facebook user IDs. Usually, this will be CONTACT.

5. From **Customer table: Lookup field**, select the column in your customer details table that contains customers' Facebook user IDs. Usually, this field is FACEBOOK_ID.

> **Note:** When a customer starts a Facebook chat, Syntelate XA matches against this field in your customer details table. If a match is found, the customer's record is retrieved. If a match is not found, Syntelate XA creates a new record in your customer details table.

6. From **Lookup type**, select **Phonenumber**.

7. From **Customer table: Customer ID field**, select the field in your customer details table that contains unique customer IDs that Syntelate XA should use to match against the INTERACTION_X table. Usually, this is CONTACT_ID.

8. From **Interaction table: Client table ID**, select the field in the INTERACTION_X table that Syntelate XA should match against the **Customer ID Field**. Usually, this is CONTACT_ID.

   > **Note:** Your customer details table contains one record per customer. The INTERACTION_X table, on the other hand, contains one record per customer interaction (in other words, it contains one record for every web chat, phone call, and so on).
   >
   > Both tables must contain a column for a unique customer ID. This is the **Customer ID Field** in your customer details table and the **Client Table ID** field in the INTERACTION_X table. Syntelate XA uses this unique ID to link each customer interaction (such as a web chat or phone call) to one of your customers.

9. Save your settings . The page refreshes. It shows you the gateway's settings that you just created. It also shows you some further configuration options.

You are now ready to explore those options. See below for further guidance.

5.11.5.4 What's Next?

You've now added a basic Facebook gateway, but there's more to do. See the following tasks:

- Shortening URLs on page 79
- Setting the Chat Disposition Codes on page 67
- Setting the Chat Messages on page 70
- Setting the Fields to Be Written to the Interaction Table on page 75 (for example, to restrict the Facebook chat to a particular workzone)
- Setting the Fields for New Customers on page 73 (to write the customer's Facebook user ID to your customer details table)

Once you're happy with how your message gateway is configured, you need to set it to active before it can be used. See Making a Message Gateway Active/Dormant on page 66.

5.11.6 Adding a WhatsApp Gateway

There are two ways to add a new WhatsApp gateway:

- Copying a Message Gateway on page 64
- Add a new message gateway.

> **Note:** Before you can set up a social media message gateway, your company must have its own social media third-party app.
>
> We can create the app for you or help you create it. See Social Media Message Gateways.

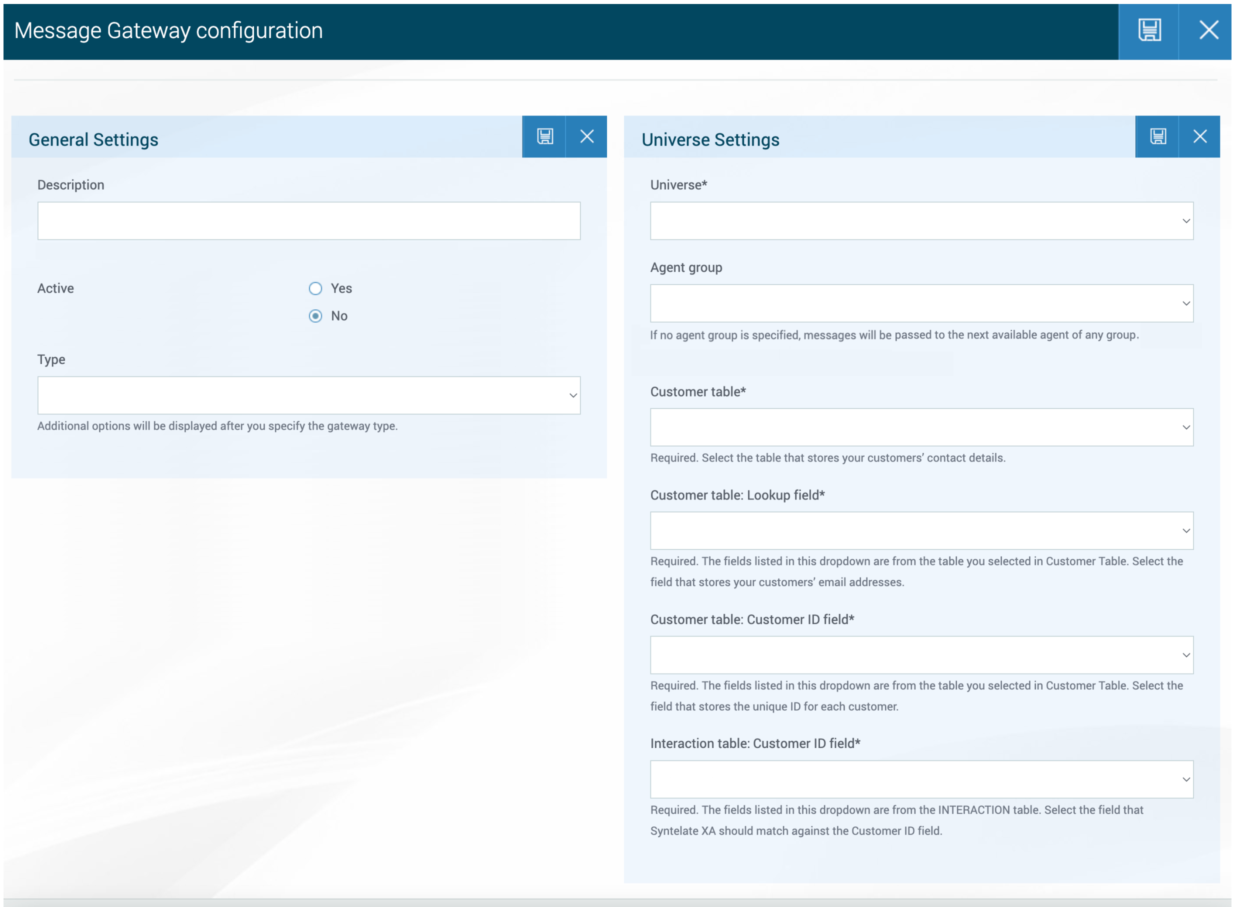
5.11.6.1 Add the Gateway

1. In Studio, go to **Message Gateway configuration**. You see a list of universes. Each universe has an Edit Message Gateway button.

   > **Note:** The list of universes is restricted by your Studio user ID and role. This means you can only see the universes that you have been assigned to.

2. Choose Edit Message Gateway for your preferred universe. You see the message gateways index page, listing all the existing gateways in this universe.

3. From the toolbar, add + a new gateway. You see the Message Gateway settings page.



The settings are organized into two sections: **General Settings** and **Universe Settings**. Follow the steps below to get started with editing the **General Settings**.

5.11.6.2 Edit the General Settings

1. In **Description**, enter a description for your gateway.

> **Note:** This description will be shown to agents at the top of each WhatsApp chat. It should indicate what the chat is about, for example **Personal Travel** or **Business Travel**.

2. From **Type of message gateway**, select **Social Media**. You see additional boxes.

3. In **Name**, enter a name for your gateway.

4. For **Enable reporting**, select **Yes** to enable reporting for your gateway or **No** to disable it.

> **Note:** For information about chat reporting, see document *Syntelate XA - Reporting*.

5. In **Destination**, you need to enter the code used by Syntelate XA to connect to your WhatsApp third-party solution provider. Currently, Syntelate XA supports the solution providers Sunshine Conversations and MessageBird. Enter one of the following codes depending on which provider you use:

   - For Sunshine Conversations, enter **SUNC**.
   - For MessageBird, enter **MBAPI**.

6. In **Maximum file size for attachments**, enter a file size limit in KB format, for example, 1024.

> **Tip:** 1024 KB is 1 MB.

7. In **Message expiry time**, you can reduce the WhatsApp 24-hour customer service window for WhatsApp messages that are in the Syntelate XA queue. Doing so will ensure agent replies are delivered before the window closes. Enter the number of minutes that you want the 24-hour response window to be shortened to, for example, **1430**. (1430 minutes is 23 hours 50 minutes.) See Reduce the Window for more information.

8. For **Route records to the same agent?**, select **Yes** if you want a customer to be passed to the same agent who handled their previous message.

9. Use **Route to last agent window** when you choose **Route records to the same agent** so that Syntelate XA knows which messages will be eligible for routing to the same agent. New messages will be routed to the same agent only if the new message is received by Syntelate XA within the window of time you specify here. Enter a number of minutes as a whole number, for example, **30**.

10. For **Allow inbound calls?**, choose **Yes** if you want to prioritize inbound calls over WhatsApp chats; this will result in inbound calls being allowed to interrupt agents who are handling WhatsApp chats.

Next, you need to configure the gateway's **Universe Settings**.

5.11.6.3 Edit the Universe Settings

1. From **Universe**, select the universe to which this gateway should be added.
2. From **Agent group**, select the agent group that will deal with this WhatsApp number.
3. From **Smart text group**, select the smart text group that will be available to agents dealing with this WhatsApp number.
4. From **Customer table**, select the table that contains your customers' details, specifically your customers' WhatsApp mobile numbers.
5. From **Customer table: Lookup field**, select the column in your customer details table that contains customers' WhatsApp phone numbers.

   > **Note:** When a customer starts a WhatsApp chat, Syntelate XA matches against this field in your customer details table. If a match is found, the customer's record is retrieved. If a match is not found, Syntelate XA creates a new record in your customer details table.

6. From **Lookup type**, select **Phonenumber**.
7. From **Customer table: Customer ID field**, select the column in your customer details table that contains unique customer IDs that Syntelate XA should use to match against the INTERACTION_X table.
8. From **Interaction table: Client table ID**, select the column in the INTERACTION_X table that Syntelate XA should match against the **Customer ID Field**.

> **Note:** Your customer details table contains one record per customer. The INTERACTION_X table, on the other hand, contains one record per customer interaction (in other words, it contains one record for every web chat, phone call, and so on).
>
> Both tables must contain a column for a unique customer ID. This is the **Customer ID Field** in your customer details table and the **Client Table ID** field in the INTERACTION_X table. Syntelate XA uses this unique ID to link each customer interaction (such as a web chat or phone call) to one of your customers.

9. Save your settings . The page refreshes. It shows you the gateway's configuration. It also shows you some additional options.

You are now ready to explore those options. See below for further guidance.

5.11.6.4 What's Next?

You've now added a basic WhatsApp gateway, but there's more to do. See the following tasks:

- Shortening URLs on page 79
- Setting the Chat Disposition Codes on page 67
- Setting the Chat Messages on page 70
- Setting the Fields to Be Written to the Interaction Table on page 75
- Setting the Fields for New Customers on page 73

Once you're happy with how your message gateway is configured, you need to set it to active before it can be used. See Making a Message Gateway Active/Dormant on page 66.

5.12 Web Chat Message Gateways

This section provides instructions for using the **Message Gateway configuration** tool to create a web chat service in Syntelate XA.

Configuring a web chat message gateway involves both:

- Setting up web chat topics; and
- Customizing the web chat widget.

You must also set up any smart text that you want your agents to be able to use. For information about customizing the web chat widget, see document *Syntelate XA - Web Chat Configuration*.

5.12.1 Web Chat Topics

The following is what the web chat message gateway (and therefore also the topic) controls:

- The agent group that will participate in chats about the topic
- The smart text group available in chats about the topic
- Whether auto-responses are sent and, if so, after how long

- The chat disposition codes
- The chat messages used for the topic, for example the message that is shown when the customer is connected to an agent

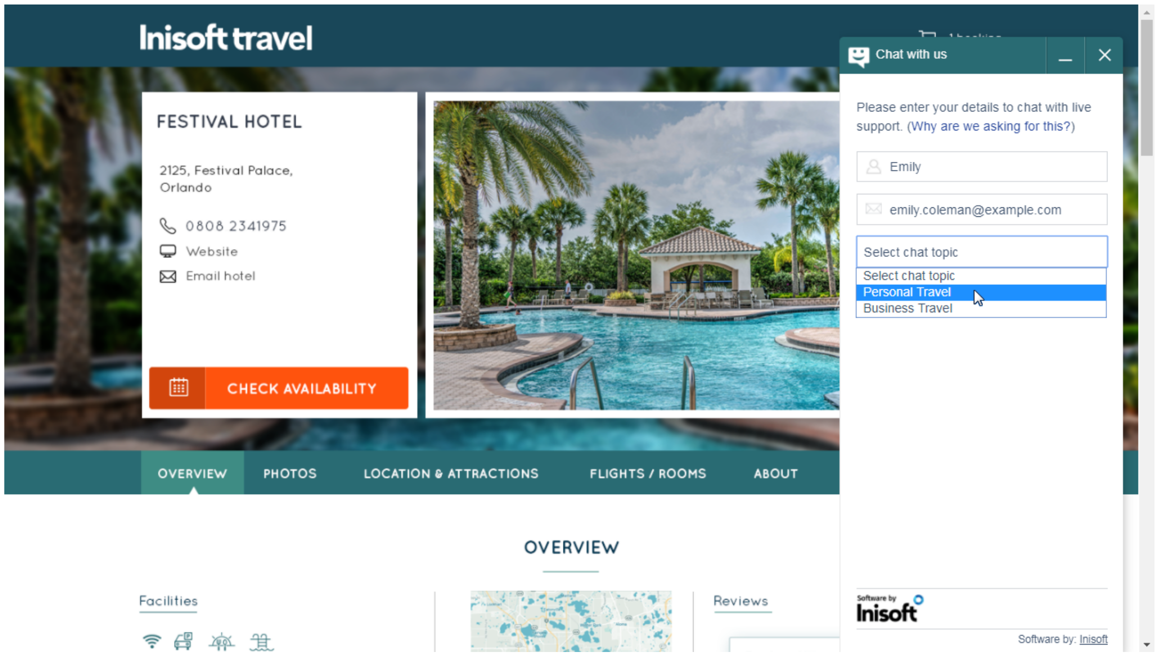
The topic also controls:

- How long a customer can spend waiting to chat with an agent before they are asked to leave a message
- The leave a message gateway to use
- The email gateway to use when emailing a chat transcript to a customer
- The information that Syntelate XA writes to the INTERACTION_X table
- The information that Syntelate XA writes to your customer details table for a new customer record

> **Note:** You can allow customers to pick the topic themselves or you can automatically select the topic based on the web page from which the customer opens the chat. For more information, see document *Syntelate XA - Web Chat Configuration*.

You can create multiple web chat topics to allow customers to get in touch about different things.

> **EXAMPLE**
>
> Customers can contact Inisoft Travel via a web chat widget on the Inisoft Travel website. When a customer starts a web chat, they are asked to select a topic.



Here Personal Travel and Business Travel are two different web chat topics (web chat gateways).

5.12.2 Adding a Web Chat Gateway

There are two ways to add a new web chat message gateway:

- Copy an existing web chat gateway.
- Add a new web chat message gateway.

Before you start, you must have already configured the leave a message gateway that your web chat gateway will use. For more information, see Leave a Message on page 79.

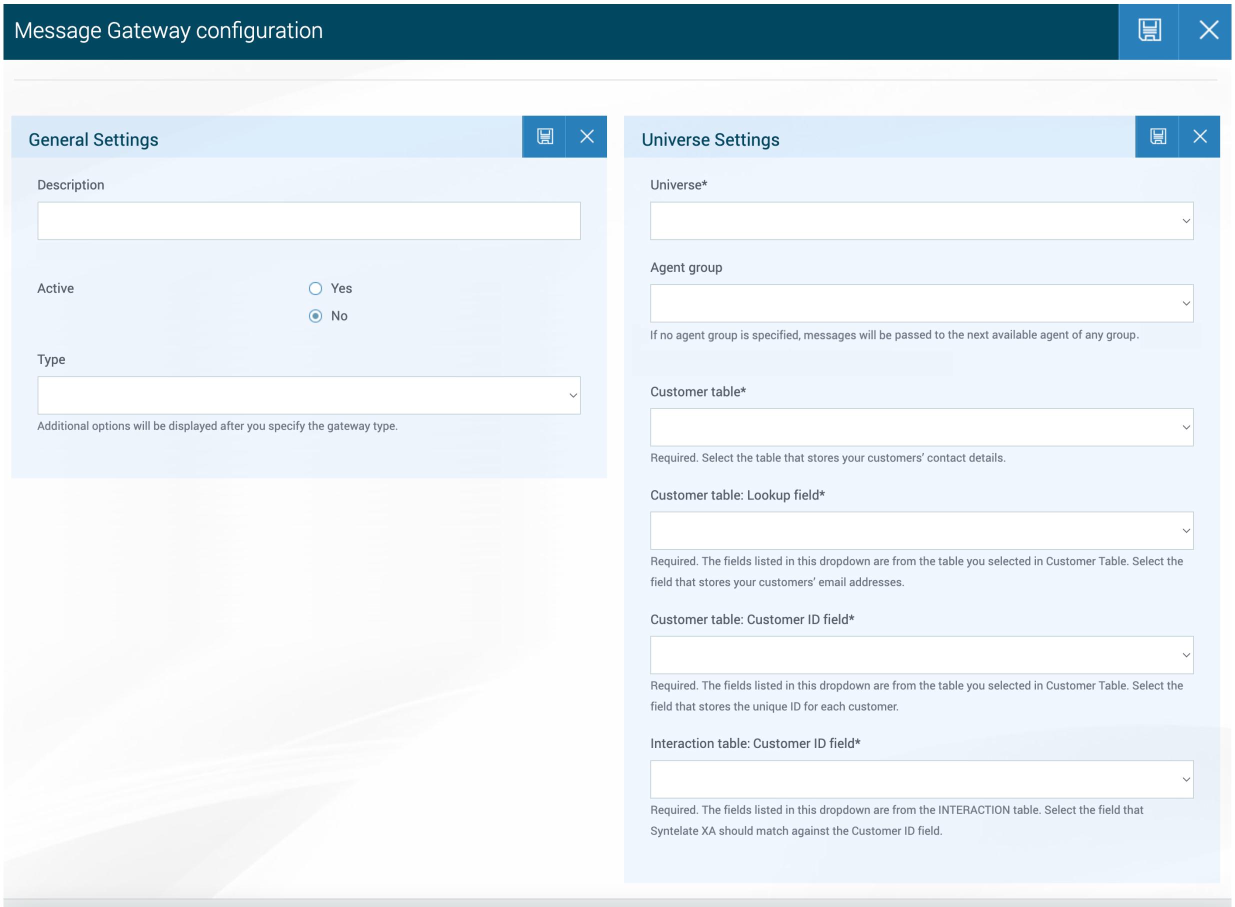
5.12.2.1 Add the Gateway

1. In Studio, go to **Message Gateway configuration**. You see a list of universes. Each universe has an Edit Message Gateway button.

   > **Note:** The list of universes is restricted by your Studio user ID and role. This means you can only see the universes that you have been assigned to.

2. Choose Edit Message Gateway for your preferred universe. You see the message gateways index page, listing all the existing gateways in this universe.

3. From the toolbar, add + a new gateway. You see the Message Gateway settings page.



The settings are organized into two sections: **General Settings** and **Universe Settings**. Follow the steps below to get started with editing the **General Settings**.

5.12.2.2 Edit the General Settings

1. Required. In **Name**, enter a name for your web chat topic.

> **Note:** This is for your reference only. The name will not be shown to customers or agents.

2. Required. In **Description**, enter a description of your web chat topic.

> **Note:** If you let customers select the topic, this description will also be shown in the **Select chat topic** dropdown of the web chat widget.

3. For **Active**, choose **Yes** to make your web chat available.

4. Required. In **Type of message gateway**, select **Web Chat**. Additional boxes relevant to this type of message gateway appear.

5. *(Optional)* For **Enable reporting**, select **Yes** to enable reporting for your web chat topic or **No** to disable it.

> **Note:** For information about chat reporting, see document *Syntelate XA - Reporting*.

6. *(Optional)* If your web chat allows attachments, in **Path to attachments** provide the path in your file system where the files should be saved.

> **Note:** Use **Web Chat Configuration** in Syntelate Studio to enable/disable file uploads for your web chat, and specify which file types are allowed. For more information, see document *Syntelate XA - Web Chat Configuration*.

7. *(Optional)* **Maximum file size for attachments** allows you to specify a file size limit, in kilobytes, for attachments uploaded to a web chat. The default limit is 5645 KB (5 MB), so if you need to impose a lower or higher limit, you should enter the size here. Doing so will save your preference to the WebChatMaxUploadMb field of the GENERAL table. If you leave the setting empty, then Syntelate XA will apply its

default limit.

8. *(Optional)* For **Enable chatbot**, select **Yes** if you want to integrate a third-party chatbot with the web chat.
9. *(Optional)* In **Type of chatbot**, enter the code used by Syntelate XA to connect to your chatbot provider.
10. *(Optional)* **ID of chatbot** is only needed if you use a chatbot.
11. *(Optional)* **URI of chatbot** is only needed if you use a chatbot.
12. *(Optional)* **Region ID** is only needed if you use a chatbot.
13. *(Optional)* **Agent ID** is only needed if you use a chatbot.
14. *(Optional)* **JSON credentials of chatbot** is only needed if you use a chatbot.
15. *(Optional)* If you select **Yes** for **Route records to the same agent?**, when a customer sends a message, they will deal with the same agent who handled their previous message.
16. **Route to last agent window** is required if you choose **Route records to the same agent**.New messages will be routed to the same agent only if the new message is received within the window of time you specify here. Enter a number of minutes as a whole number, for example, **30**.

Next, edit the Universe Settings.

5.12.2.3 Edit the Universe Settings

1. From **Universe**, select the universe to which this gateway should be added.

2. From **Agent group**, select the agent group that will deal with this topic.

3. From **Smart text group**, select the smart text group that will be available to agents dealing with this topic.

4. From **Customer table**, select the table that contains your customers' contact details.

5. From **Customer table: Lookup field**, select the column in your customer details table that contains customers' email addresses.

> **Note:** When a customer starts a web chat, Syntelate XA matches against this field in your customer details table. If a match is found, the customer's record is retrieved. If a match is not found, Syntelate XA creates a new record in your customer details table.

6. From **Customer table: Customer ID field**, select the field in your customer details table that contains unique customer IDs that Syntelate XA should use to match against the INTERACTION_X table.

7. From **Interaction table: Client table ID**, select the field in the INTERACTION_X table that Syntelate XA should match against the **Customer ID field**.

> **Note:** Your customer details table contains one record per customer. The INTERACTION_X table, on the other hand, contains one record per customer interaction (in other words, it contains one record for every web chat, phone call, and so on).
>
> Both tables must contain a column for a unique customer ID. This is the **Customer ID field** in your customer details table and the **Client table ID** field in the INTERACTION_X table. Syntelate XA uses this unique ID to link each customer interaction (such as a web chat or phone call) to one of your customers.

8. In **Timer for canned apology**, enter a number of minutes as a whole number, for example, **3**. If an agent hasn't replied to a customer's message by the time specified here, Syntelate XA sends the customer the AGENTAUTOMSG. Alternatively, you can disable the message by entering **0**.

> **Note:** The AGENTAUTOMSG message could be something like *Sorry for the delay. I'll get back to you soon.* You can use whatever text you like for this message. For instructions on how to customize it, see Setting the Chat Messages on page 70.

9. In **Timer for customer prompt**, enter a number of minutes as a whole number, for example, **5**. If a customer hasn't replied to an agent's message by the time specified here, Syntelate XA sends the customer the CLIENTAUTOMSG. Alternatively, enter **0** to disable the message.

> **Note:** This message could be something like *I haven’t heard from you for a while. Are you still there?*
>
> You can use whatever text you like for this message. For instructions on how to customize it, see Setting the Chat Messages on page 70. This is the CLIENTAUTOMSG message.

10. In **Timer for Leave a message prompt**, enter a number of minutes as a whole number, for example, **7**. Customers will be prompted to leave a message if they are not connected to an agent by the time specified here. Alternatively, enter **0** to disable this prompt.

> **Note:** If you want to use Leave a Message and its prompt, you need to create a Leave a Message on page 79 gateway. Ideally, you should do that before you create a Web Chat Message Gateway: see Step 12 below.

11. In **Timer for end chat prompt**, enter a number of minutes as a whole number. If a customer hasn't sent a message by the time specified here, Syntelate XA sends the agent the NOACTIVITYMESSAGE to prompt them to end the chat. Alternatively, enter **0** to disable the message.

> **Note:** The **Timer for customer prompt** (see Step 9 above) controls a message that is sent to the customer. The **Time for end chat prompt**, on the other hand, controls a message that is only seen by the agent.
>
> Its purpose is to suggest to the agent that, if a customer has not sent a message in some time, the agent should consider ending the chat.
>
> You can use whatever text you like for this message. For instructions on how to customize it, see Setting the Chat Messages on page 70. This is the NOACTIVITYMESSAGE message.

12. Required. From **Message gateway to use when displaying Leave message**, select the leave a message gateway for use when a customer leaves a message for this web chat topic.

13. *(Optional)* From **Message gateway to use when emailing the chat transcript**, select the email gateway to use when either a customer or an agent selects for the chat transcript to be emailed to the customer. Alternatively, leave the dropdown blank to disable transcripts by email.

14. Save your settings . The page refreshes. It shows you the gateway's configuration. It also shows you some additional options.

You are now ready to explore those options. See below for further guidance.

5.12.2.4 What's Next?

You've now added a basic web chat topic configuration, but there's still more to do! See the following tasks:

- Shortening URLs on page 79
- Setting the Chat Disposition Codes on page 67
- Setting the Chat Messages on page 70
- Setting the Fields to Be Written to the Interaction Table on page 75
- Setting the Fields for New Customers on page 73

Once you're happy with how your message gateway is configured, you need to set it to active before it can be used. See Making a Message Gateway Active/Dormant on page 66.

To use your new topic in a web chat, you must add your topic to the web chat using the **Web Chat Configuration** tile of Syntelate Studio. For more information, see document *Syntelate XA - Web Chat Configuration*.

6. Smart Text Editor

Use the **Smart Text Editor** tile of Syntelate Studio to configure smart text for chat.

6.1 Concepts

To use smart text, you'll need to understand the following concepts.

6.1.1 Smart Text

Smart text is text that an agent can quickly insert into a chat, for example *Goodbye and thank you for contacting us*. Each piece of smart text consists of a **code**, a **title**, and **text**.

Element	Description
Code	A unique identifier for the smart text. If agents know this code, they can type it into the text box in Syntelate XA to quickly insert the smart text. Syntelate XA makes smart text suggestions as soon as the agent starts typing, which means agents don't have to type the entire code.
Title	A title for the smart text. This is displayed to agents when they open the **Smart text** menu in Syntelate XA. It should be something that helps agent to find the right smart text.
Text	The actual text that is sent to customers when agents use this smart text.

EXAMPLE

Customers frequently contact Inisoft Travel to ask about their baggage allowance. To help agents on a chat quickly reply to such questions, Jack at Inisoft Travel adds the following smart text:

- **Code:** BAGGAGE
- **Title:** Baggage URL
- **Text:** You can find general advice on baggage at :url:http://inisoft.com/baggage:endurl:.

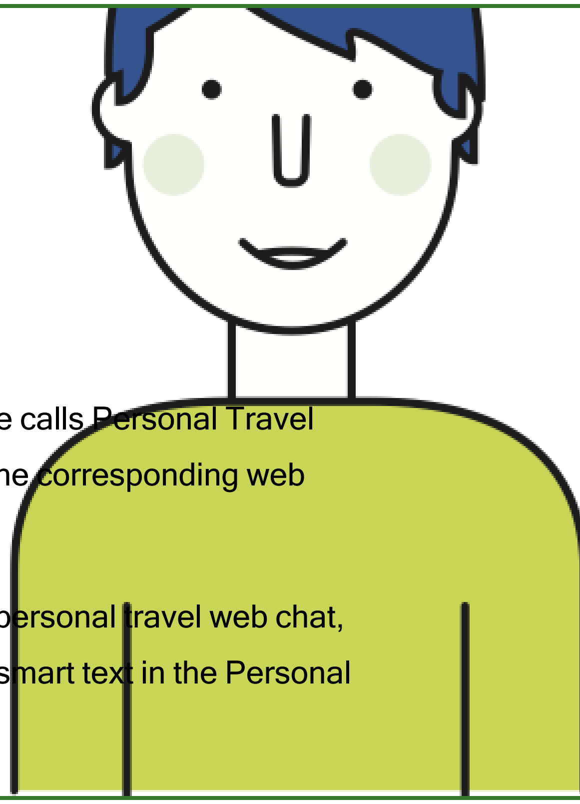
When agents use this smart text, the following text is sent to customers:

You can find general advice on baggage at http://inisoft.com/baggage.

6.1.2 Smart Text Groups

A **smart text group** defines all the smart text that is available to an agent dealing with a particular topic (chat gateway).

EXAMPLE



Inisoft Travel have two web chat topics:

- Personal Travel
- Business Travel

Bob creates two smart text groups, which he calls Personal Travel and Business Travel, and assigns each to the corresponding web chat topic.

This means that, when an agent handles a personal travel web chat, for example, they'll be able to use all of the smart text in the Personal Travel smart text group.

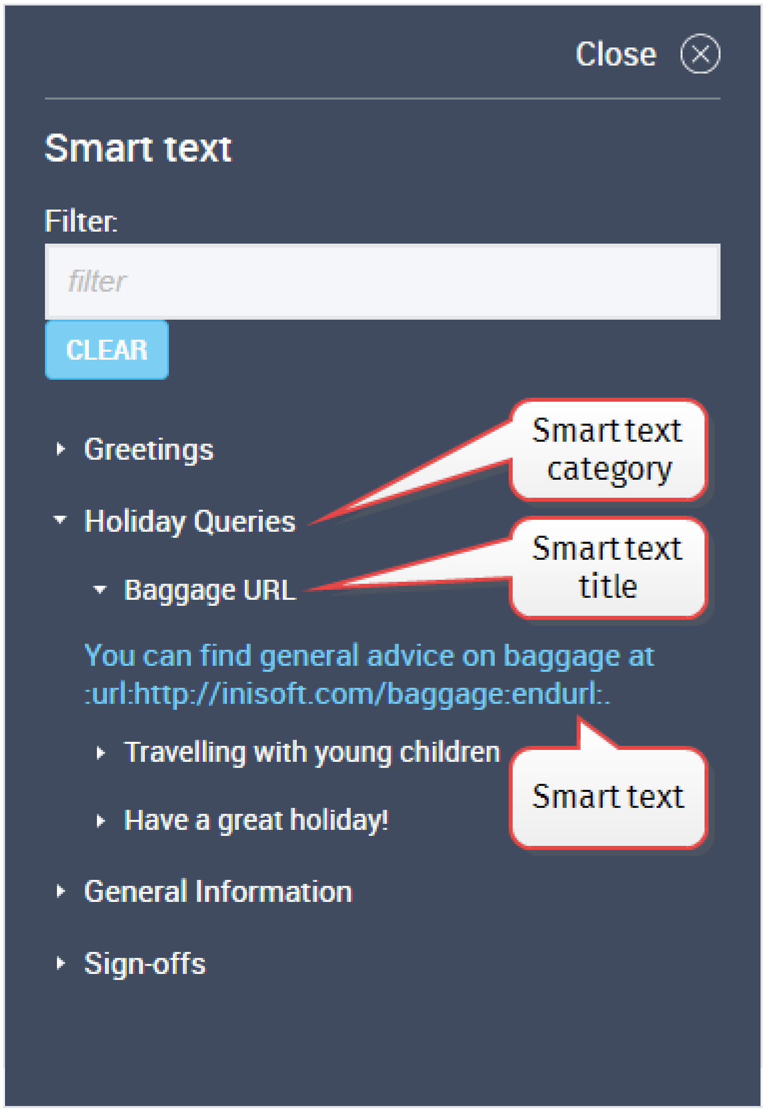
Note: You can assign a smart text group to different chat groups so that smart text designed for a specific business stream, such as sales, will only show to agents handling sales chats. You can do this by using the Message Gateway Configuration tile to assign a smart text group to a message gateway.

6.1.3 Smart Text Categories

Smart text categories let you arrange smart text for agents.

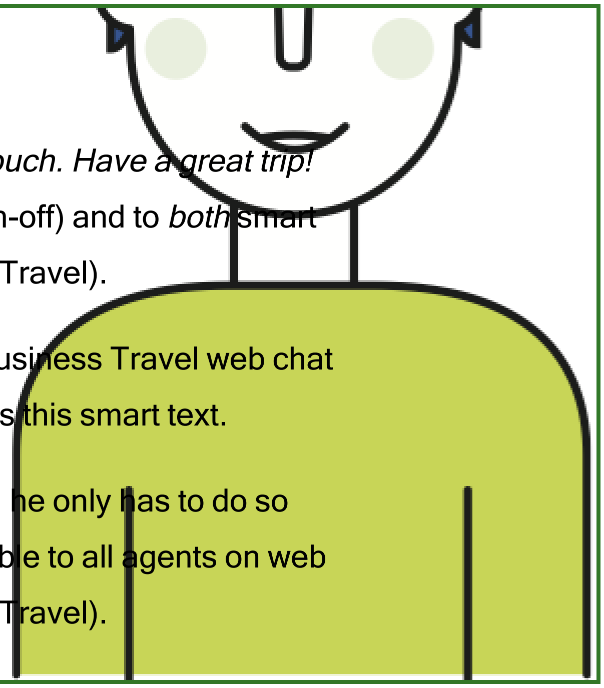
6.2 Smart Text in Syntelate XA

Here's how smart text is presented to agents in the **Smart text** menu of Syntelate XA:



In Syntelate Studio, each smart text entry can be assigned to one or more categories and to one or more groups. This encourages re-usability, making smart text easier for you to maintain.

EXAMPLE



At Inisoft Travel, the *Thanks for getting in touch. Have a great trip!* smart text is assigned to one category (Sign-off) and to *both* smart text groups (Personal Travel and Business Travel).

As a result, both the Personal Travel and Business Travel web chat topics have a Sign-off category that includes this smart text.

If Jack ever needs to update this smart text, he only has to do so once. The updated smart text is then available to all agents on web chat (whether Personal Travel or Business Travel).

6.3 Refreshing the Web Server

After editing smart text / a group / a category, your changes should take effect from your agents' next chat.

If they do not, then click  from the **Smart Text** / **Smart Text Groups** / **Smart Text Categories** page to refresh the web server.

6.4 Tasks

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

6.5 Adding a Smart Text Category

To add a smart text category, follow these steps:

1. From the **Smart Text Editor** home page, click **EDIT CATEGORIES**. The **Smart Text Categories** page is shown.
2. Click +. The **Edit Smart Text Category** details page is shown.
3. In the **Code** box, type a unique code that will identify the smart text category.
4. In the **Title** box, type the title for the smart text category. This is shown to agents in the **Smart text** menu of Syntelate XA.
5. In the **Sequence** box, type the sequence number of the category. For example, if you want your category to be the second category in the **Smart text** menu of Syntelate Agent, type **2**.

> **Tip:** You can also click ▲ or ▼ to change the sequence number. Alternatively, you can edit the sequence from the **Smart Text Categories** page, where you can see the full list of categories.

> **Note:** If you enter a sequence number that is already used by another category, Syntelate Studio will automatically change the sequence number of the other category as well as that of any other affected categories.
>
> Categories only show to agents in the **Smart text** menu of Syntelate XA if a smart text entry that has been assigned to that category has also been assigned to the group. For this reason, a category with a sequence number of 3, for example, could actually be listed to agents as the second category.

6. To assign smart text to your category, under **Available Smart Texts**, double-click a smart text title. The smart text is removed from the **Available Smart Texts** list and added to the **Allocated Smart Texts** list.

> **Tip:** To see the smart text itself, hover over the smart text title.
>
> To filter the smart text entries, type part of the smart text title into the **Filter** box.
>
> To allocate all (filtered) smart text entries to your category, click **ALLOCATE ALL**.

> **Note:** To remove a smart text entry again, double-click it in the **Allocated Smart Texts** section.
>
> To filter the assigned smart text, type part of the smart text title into the **Filter** box.
>
> To remove all (filtered) smart text from your group, click **REMOVE ALL**.

7. You can control the order in which smart text entries are shown to agents in the **Smart text** menu of Syntelate Agent. In the **Allocated Smart Texts** list, click or beside a smart text title to move that smart text entry up or down the list.

   > **Note:** Smart text entries are only shown in the **Smart text** menu of Syntelate Agent if they are assigned to the smart text group that is used by the chat topic.

8. Click .

6.6 Adding a Smart Text Group

To add a smart text group, follow these steps:

1. From the **Smart Text Editor** home page, click **EDIT GROUPS**. The **Smart Text Groups** page is shown.

2. Click . The **Edit Smart Text Group details** page is shown.

3. In the **Code** box, type a unique code that will identify the smart text group.

4. In the **Title** box, type the title for the smart text group.

   > **Note:** Unlike the smart text title and the category title, the group title is not shown to agents.

5. To assign smart text to your group, under **Available Smart Texts**, double-click a smart text title. The smart text is removed from the **Available Smart Texts** list and added to the **Allocated Smart Texts** list.

> **Tip:** To see the smart text itself, hover over the smart text title.
>
> To filter the smart text entries, type part of the smart text title into the **Filter** box.
>
> To allocate all (filtered) smart text entries to your group, click **ALLOCATE ALL**.

> **Note:** To remove a smart text entry again, double-click it in the **Allocated Smart Texts** section.
>
> To filter the smart text assigned to your group, type part of the smart text title into the **Filter** box.
>
> To remove all (filtered) smart text from your group, click **REMOVE ALL**.

6. Click .

6.6.1 What's Next?

Now that you've created your smart text group, you'll want to associate it with a message gateway – otherwise your agents won't be able to use it.

For more information, see the document *Syntelate XA - Message Gateway Configuration*.

6.7 Adding Smart Text

To add a smart text entry, follow the steps below.

6.7.1 Step 1: Code and Title

1. From the **Smart Text Editor** home page, click **EDIT SMART TEXTS**. The **Smart Texts** page is shown.

2. Click +. The **Edit Smart Text details** page is shown.

3. In the **Code** box, type a unique code that will identify the smart text.

> **Note:** If agents know this code (or at least the start of it), they can type this into the text box in Syntelate XA to quickly insert the smart text (without having to use the **Smart text** menu). As such, we recommend that you think carefully about the codes that you use.

4. In the **Title** box, type the title for the smart text.

5. To activate the smart text now, click **Yes** under **Active**.

6.7.2 Step 2: Text

Use the **Text** box to enter the smart text itself. The **Preview** field shows how the smart text will look to an agent.

As well as freely typing into this box, you can insert database fields, URLs, and radio buttons.

6.7.2.1 Inserting a Database Field

To insert a database field, follow these steps:

1. In the **Insert Campaign fields** section, select your universe in the **Campaign** dropdown. The **External tables** dropdown and fields are shown.
2. In the **External tables** dropdown, select the database table containing the field that you want to insert. The list of fields updates to the fields of that table.
3. Double-click the field that you want to insert.

> **EXAMPLE**
>
> Jack wants to add smart text for *Is there anything else that I can help you with today, <customer first name>?*
>
> To insert the customer's first name into the smart text, Jack selects his universe in the **Campaign** dropdown. In the **External tables** dropdown, he then selects his customer details table. Finally he double-clicks the first name field.

6.7.2.2 Inserting a URL

To insert a URL (web address), follow these steps:

1. In the **Insert Special Characters** section, type the URL into the **URL** box.
2. Click .

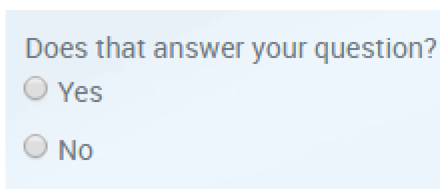
6.7.2.3 Inserting Radio Buttons

To insert radio buttons into your smart text, follow these steps:

1. In the **Insert Special Characters** section, type a radio button label into the **Radio Button Option** box.
2. Click +.
3. Repeat steps 1-2 for any other radio buttons that you want to add.

EXAMPLE

Jack wants to add the following smart text:



To get the radio buttons, Jack uses the **Radio Button Option** box. First he types **Yes** and then **No**.

6.7.3 Step 3: Categories and Groups

If you’ve already added smart text categories and/or groups, you can now assign your smart text to these. Smart text must be assigned to at least one category and one group to be available for use by agents.

To assign your smart text to a category, under **Available Categories**, double-click a category. The category is removed from the **Available Categories** list and added to the **Selected Categories** list.

Tip: To filter the available categories, type part of the category title into the **Filter** box.

To allocate the smart text to all (filtered) available categories, click **ALLOCATE ALL**.

Note: To remove a category again, double-click it in the **Selected Categories** section.

To filter the selected categories, type part of the category title into the **Filter** box.

To remove the smart text from all (filtered) selected categories, click **REMOVE ALL**.

To change the order in which smart text entries are listed to agents within a category, edit the category. For more information, see Adding a Smart Text Category on page 130.

To assign your smart text to a group, use the **Available Groups** and **Selected Groups** lists. These work in the same way as the **Available Categories** / **Selected Categories** lists.

Once you're happy with how you've configured your smart text, click  to save.

6.8 Copying Smart Text / a Group / a Category

To copy smart text, a group, or a category, follow these steps:

1. From the **Smart Text Editor** home page, click **EDIT SMART TEXTS**, **EDIT GROUPS**, or **EDIT CATEGORIES** (depending on what you want to copy).
2. Click for the smart text / group / category that you want to copy.
3. Click . A dialog box appears, asking you to confirm the copy.
4. Click **SAVE AS**. The details of the copied smart text / group / category are shown. The **Code** field is blank.
5. Type a new code into the **Code** field.
6. Edit the other details of the copied smart text / group / category as required.

> **Note:** For information about the fields on each page, see the appropriate section:
>
> - Adding Smart Text on page 134
> - Adding a Smart Text Group on page 132
> - Adding a Smart Text Category on page 130

7. Click .

6.9 Deleting Smart Text / a Group / a Category

> **Note:** You can delete a smart text category or group even if it has been assigned smart text.
>
> If a group has been assigned to a message gateway, Syntelate Studio will warn you of this when you attempt to delete the group. You can, however, proceed if you wish.

To delete smart text, a group, or a category, follow these steps:

1. From the **Smart Text Editor** home page, click **EDIT SMART TEXTS**, **EDIT GROUPS**, or **EDIT CATEGORIES** (depending on what you want to delete).
2. Click for the smart text / group / category that you want to delete. A dialog box appears, asking you to confirm the deletion.
3. Click **DELETE**.

6.10 Editing Smart Text / a Group / a Category

To edit smart text, a group, or a category, follow these steps:

1. From the **Smart Text Editor** home page, click **EDIT SMART TEXTS**, **EDIT GROUPS**, or **EDIT CATEGORIES** (depending on what you want to edit).
2. Click for the smart text / group / category that you want to edit.
3. Edit the details of the smart text / group / category as required.

> **Note:** For information about the fields on each page, see the appropriate section:
>
> - Adding Smart Text on page 134
> - Adding a Smart Text Group on page 132
> - Adding a Smart Text Category on page 130

4. Click .

7. SMTP Configuration

Syntelate Studio can send automated email reports. For example, when scheduling an import in the Worklist Manager Importer tile, you can configure an email to be sent when the import is complete.

For Syntelate Studio to send emails, you must set up an SMTP (Simple Mail Transfer Protocol) configuration. This defines the SMTP server to use for sending emails.

Use the **SMTP Configuration** tile of Syntelate Studio to set up an SMTP configuration.

7.1 Tasks

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

7.2 Adding an SMTP Configuration

> **Warning:** Syntelate Studio allows you to add multiple SMTP configurations. However, Syntelate Studio does not yet support more than one SMTP configuration.
>
> When multiple configurations are defined, Syntelate Studio will always use the first configuration.

To add an SMTP configuration, follow these steps:

1. From the SMTP Configuration home page, click +. The **Create SMTP Configuration** dialog box appears.
2. In the **Servername / IP Address** box, enter the server name or IP address of the server to connect to.
3. In the **User** box, enter your SMTP server username, if required.
4. In the **Password** and **Confirm password** boxes, enter your SMTP server password, if required.
5. Click **SAVE**.

7.3 Deleting an SMTP Configuration

To delete an SMTP configuration, follow these steps:

1. From the SMTP Configuration home page, click for the SMTP configuration that you want to delete. The **Confirm Delete** dialog box appears.
2. Click **DELETE**.

7.4 Editing an SMTP Configuration

To edit an SMTP configuration, follow these steps:

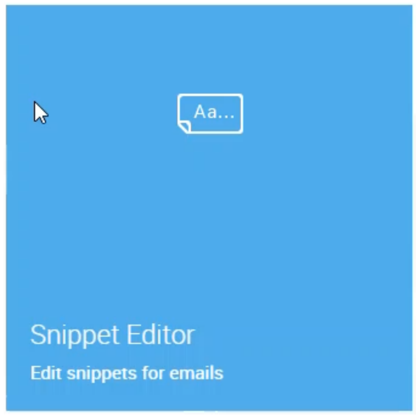
1. From the SMTP Configuration home page, click for the SMTP configuration that you want to edit. The **Edit SMTP Configuration** dialog box appears.
2. Edit the details of the SMTP configuration as required.

> **Note:** If a password has been specified for the SMTP configuration, you must enter this again in the **Confirm password** box.

3. Click **SAVE**.

8. Snippet Editor

8.1 Overview



The Snippet Editor is where you create and manage snippets. Snippets are chunks of ready-made content for emails, for example, a company signature. Other typical uses of snippets include:

- Branded headers
- Email auto-replies
- Personalized greetings

8.1.1 Supervisor Experience

Supervisors and system administrators manage snippets in the Snippet Editor.

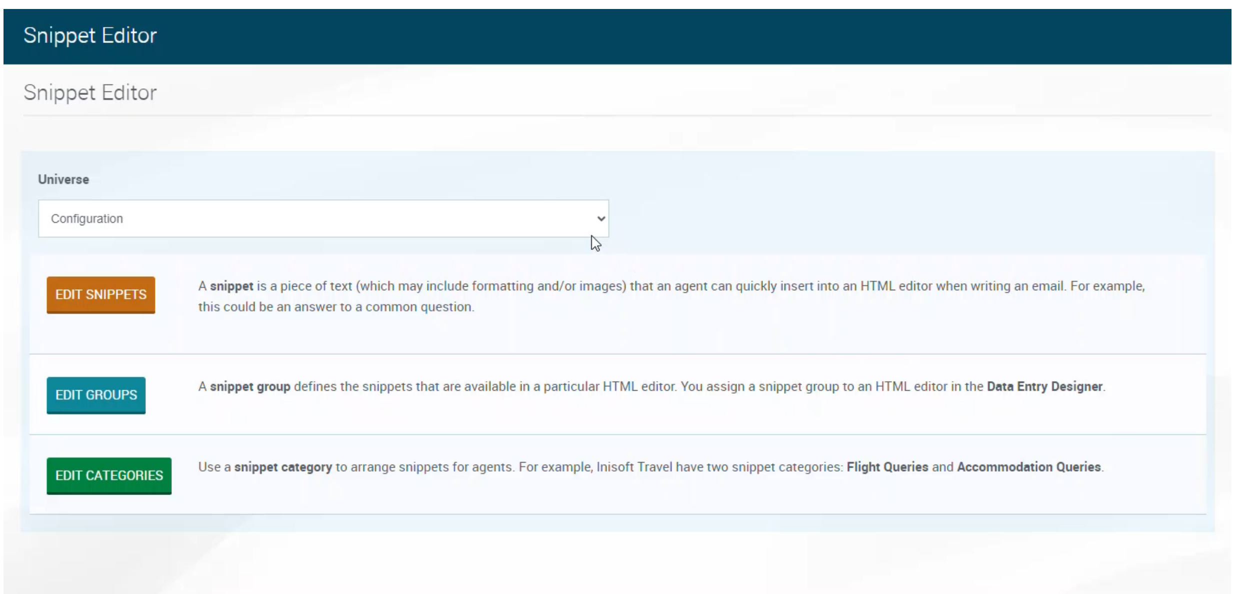
8.1.2 Agent Experience

Agents insert snippets into an email by using the snippet button in the toolbar of the HTML editor on the Syntelate XA Agent Desktop.

8.1.3 Snippet Library and Universe

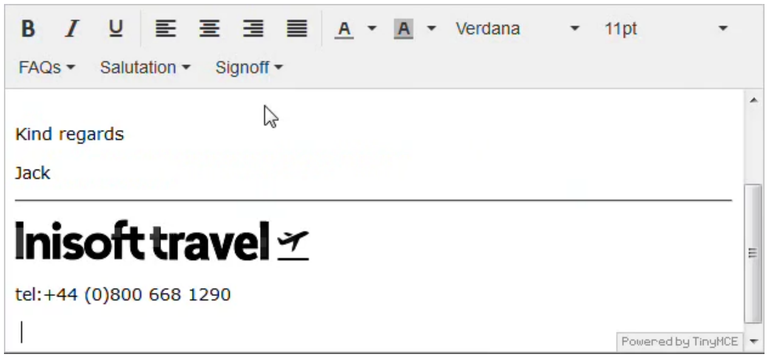
Snippets are organized into categories and groups, forming a snippet library.

Your snippet library will be saved to the universe that you specify when you first open the Snippet Editor.



This section tells you more about snippets, their categories and their groups, and how to use the Snippet Editor.

8.2 Snippets



In the screenshot above, the email signature is a snippet.

The snippet categories are displayed as buttons on the HTML editor toolbar. When the agent selects a category, they see a menu listing the **Titles** of snippets belonging to that category.

For example, in the screenshot, you can see three snippet categories in the toolbar: **FAQs**, **Salutation**, and **Signoff**.

As well as text, a snippet can include content such as images, hyperlinks, and tables. Another type of content that a snippet can include is merge fields from your Syntelate XA universes. You can see an example of a merge field in the screenshot. The snippet merges a database field from Syntelate XA containing the agent’s first name (in the video, it's "Jack"). The field data is pulled into the email when the agent inserts the snippet.

8.3 Snippet Categories

Snippet categories can be used to organize snippets into use cases, such as promotions, signatures, footers, FAQs, and so on.

The snippet category's title is displayed on a button on the HTML editor toolbar, on the agent desktop. When the agent selects the button, they see a dropdown, which lists the category's snippets.

In the screenshot, there are three categories: **FAQs**, **Salutation**, and **Signoff**.

> **Note:** A snippet can be assigned to multiple snippet categories and to multiple snippet groups. This means you can re-use the same snippet in multiple use cases (promotions, contact details, returns policy, etc) and in multiple mailboxes.

8.4 Snippet Groups

Snippet groups tell Syntelate XA which snippets to display in a HTML editor.

> **EXAMPLE**
>
> Inisoft Travel has two snippet groups:
>
> - Personal Travel
> - Business Travel

The HTML editor on Inisoft Travel's Personal Travel desktop is associated with the Personal Travel snippet group, and the HTML editor on the Business Travel desktop is associated with the Business Travel snippet group.

The HTML Editor displays snippets from one snippet group only. The group that's used by the editor is determined by one of the following:

- The snippet group property of the HTML editor, which can be found by going to Designer. Syntelate XA users with Designer access can set the snippet group property.
- The JavaScript function `getSnippetGroupForMailbox()`. This allows you to organize snippet groups by mailbox. This can be configured by an Inisoft professional services consultant.
- The JavaScript function `UpdateHtmlSnippetGroupForAgentGroups()`. This allows you to organize snippet groups by agent groups. This can be configured by an Inisoft professional services consultant.

8.4.1 Snippet Group by HTML Editor

When a snippet group is assigned to an HTML Editor, only the agents who handle email using that HTML Editor will see the snippets. Any agents using any other HTML Editor will not see those snippets.

8.4.2 Snippet Group by Mailbox

When a snippet group is assigned to a mailbox, only the agents who handle email from that mailbox will see the snippets. Other agents will not see those snippets.

8.4.3 Snippet Group by Agent Group

When a snippet group is assigned to an agent group, only the agents in that group will see the snippets. Other agents will not see those snippets.

> **Note:** If you would like to organize your snippet group by mailbox or by agent group, ask your Inisoft consultant or contact the Inisoft Support Desk at support@inisoft.com.

8.5 Reporting

Syntelate XA monitors the insertion of snippets into emails. This is done using the LKTL_SNIPPETS field in the INTERACTION_X table. By including that field in your reports, you can track and analyze snippet usage.

> **Tip:** Snippet reporting can play a useful role in contact data analysis.

8.6 Tasks

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

8.7 Adding a Snippet Category

To add a snippet category, follow these steps:

1. From the Snippet Editor home page, select the universe that the new or edited snippet categories should be saved to.
2. Click **EDIT CATEGORIES**. You see the index page, which lists any existing snippet categories.
3. Click +. The **Edit Snippet Category** page is shown.
4. In the **Code** box, type a unique code that will identify the snippet category. The code is only visible in Studio, and it won't be seen by agents. Create any code you like, but it's a good idea to choose something that indicates which business area it relates to.

   > Tip: **Code** has a max length of 6 and accepts alphanumeric characters and the underscore character.

5. In the **Title** box, type a description of the category. This is shown to agents in the menu of the HTML editor.

   > Tip: **Title** has no limit on its length, and accepts alphanumeric characters and the underscore character.

6. In the **Sequence** box, set the “sequence number” of the category. For example, if you want your category to be the second category in the menu of the HTML editor,

type **2**.

> **Tip:** You can enter a number that is already used by another category – Syntelate Studio will automatically update the other category as well as any other affected categories.
>
> You can also edit the sequence from the page that displays the list of categories.

7. Under **Available Snippets**, double-click the snippets that you want to assign to the category.

> **Tip:** To see the snippet text, hover over the title.
>
> The order in which snippets are shown here is the order in which they will be shown to agents in the menu of the HTML editor.
>
> To assign all (filtered) snippets to the category, click **ALLOCATE ALL**.

8. Click .

9. **REFRESH** the web server .

8.7.1 What's Next?

If you have not created any groups, you need to do that now. Head to Adding a Snippet Group on the next page for instructions.

8.8 Adding a Snippet Group

To add a snippet group, follow these steps:

1. From the Snippet Editor home page, select the universe that the new or edited snippet groups should be saved to.
2. Click **EDIT GROUPS**. A list of all snippet groups is shown.
3. Click +. The **Edit Snippet Group** page is shown.
4. **GroupCode**: (Required) Enter a unique code that will identify the snippet group. The code is only visible in Studio, and it won't be seen by agents. Create any code you like, but it's a good idea to choose something relevant to the purpose of the snippet group.

   > Tip: **GroupCode** has a max length of 5 and accepts alphanumeric characters and the underscore character.

5. In the **GroupDesc** box, type a description of the group. This is not shown to agents; it's shown in the **Snippet group** dropdown of the HTML Editor's **Control properties**.

   > Tip: **GroupDesc** has no limit on its length, and accepts alphanumeric characters and the underscore character.

6. Under **Available Snippets**, double-click the snippets that you want to assign to the group.

   > Tip: To see the snippet text , hover over the title.

To assign all (filtered) snippets to the group, click **ALLOCATE ALL**.

7. **SAVE** your changes .

8. **REFRESH** the web server .

8.8.1 Assigning Groups to HTML Editors

Now that you've created the snippet groups, you need to assign them to an HTML editor using using the Control properties of the HTML Editor in Data Entry Designer. See the section 'Data Entry Designer' in the document *Syntelate XA - Designer*.

Note: Only a single snippet group can be assigned to a single HTML editor, but the same snippet group can be assigned to multiple HTML editors. This saves you time and effort: you don't need to duplicate snippets, because the same snippet group can be shared by many agent desktops.

8.8.2 Assigning Groups to Mailboxes or Agent Groups

If you want to assign a snippet group to either a mailbox or an agent group instead of an HTML Editor, see Snippet Groups on page 147 for guidance.

8.9 Adding a Snippet

To add a snippet, first follow these steps:

1. From the Snippet Editor home page, select the universe that the new or edited snippets should be saved to.
2. Click **EDIT SNIPPETS**. You see the index page, which lists any existing snippets.
3. Click . The **Edit Snippet** page is shown.

Now you can start designing your snippet.

8.9.1 Step 1: Basics

First you need to set some basic details.

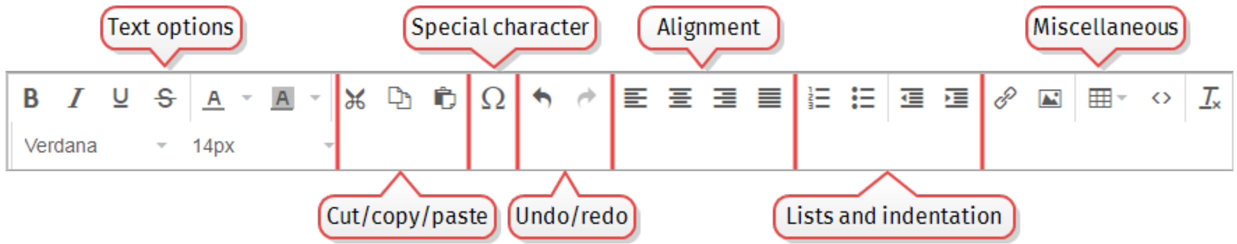
1. In the **Title** box, type a title for the snippet. This will be shown to agents in the menu of the HTML editor.
2. Under **Active**, click **Yes** to activate the snippet for use by agents. (The **Active** feature lets you disable a snippet without deleting it.)

8.9.2 Step 2: Content

Next, in **Text**, enter the content of the snippet. You can use the toolbar to format and edit the snippet's content.

8.9.2.1 The Toolbar

The toolbar lets you do things like change the font, insert special characters, and center text.



Most of the options in the toolbar should be familiar to you from other word processors, but here's a description of the miscellaneous buttons:

Button	Description
	**Insert/edit link:** Click to insert a hyperlink into the snippet. You'll be prompted to complete the following fields: » **Url:** Type the web address to visit when the user clicks the link, for example http://inisoft.com/. » **Text to display:** Type the link text that the user should click, for example visit our website. » **Title:** (optional) Type text to show when the user hovers over the link. » **Target:** Select whether or not the link should be opened in a new window.
	**Insert/edit image:** Click to insert an image into your email message. Before you do this, check that: 1. The image is located on your organization's website or secure server. (Note that the image cannot be hosted on the same server as Syntelate XA or Syntelate Studio due to how the HTML Editor handles the image's URL.) 2. You have a note of the full URL for the image.

Button	Description
	3. The image is an appropriate file size and has appropriate dimensions. Keeping the file size low, e.g. less than 1 MB, will ensure that the customer sees the image immediately when they open the email. And by ensuring the image has appropriate dimensions, you will avoid wasting time on resizing it after you insert it. (Another reason to avoid resizing images is to uphold the branding guidelines of your organization.) When you click the button you'll be prompted to provide the following information: » **Source:** The full URL of the image, for example: `http://www.yourcompany.com/myimage.png`. » **Image description:** (Optional) Use this to provide a text description of the image. It's displayed on-screen when the user cannot view the image, say because of a slow connection or because they use a screen reader. » **Dimensions:** (Optional) Enter the size of the image, width by height, in pixels. If you don't enter anything here, the image size is automatically detected. » **Constrain proportions:** (Optional) This setting is useful if you need to re-size the image without distorting it. When this is checked, the image width and height will scale together. So, if you re-size the height, the width automatically changes, too.
	Insert table: Click to insert a table into the snippet.
	View source: Click to view or edit the source HTML for the snippet.
	Clear formatting: With text selected, click to clear all formatting (such as bold

Button	Description
	and color) from the selection.

8.9.2.2 Inserting a Merge Field

You can also insert a merge field into your snippet. For example, say your customers' details are stored in a table called CONTACT: you could create a snippet that starts *Dear [CONTACT.FIRSTNAME]*. When an agent uses this snippet, the appropriate data is inserted (for example, *Dear Emily*).

To insert a merge field, use the **Insert Field** section.

1. Select your universe in the **Universe** dropdown.
2. Select the table in the **Table** dropdown.
3. Double-click the field that you want to insert.

When you have finished creating the snippet's content, you are ready to move onto the next step.

8.9.3 Step 3: Allocating Categories and Groups

> **Note:** Ignore this step if you have not yet added snippet categories or groups. The next step for you is to add some categories (and following that, some groups):
>
> 1. **Save** the snippet you've designed.
> 2. Exit the **Edit Snippet** screen.
> 3. Go to **EDIT CATEGORIES** and follow the instructions at Adding a Snippet Category on page 150.
>
> If you already have snippet categories and groups, continue with Step 3.

To assign a snippet to a category or group, double-click the category or group in the list of **Available Categories** / **Available Groups**. Alternatively, use the **ALLOCATE ALL** button to assign the snippet to all (filtered) categories/groups.

> **Note:** A snippet must be assigned to at least one category and one group to be available for use by agents.

If you assign a snippet to a category or group in error, you can remove it again by double-clicking the category or group under **Selected Categories** / **Selected Groups**.

> **Note:** To change the order in which snippets are listed within a category, go to **EDIT CATEGORIES** (in the Snippet Editor) and move the snippets into the preferred order.

8.9.4 Step 4: Save

Once you're happy with your snippet, click to save.

8.9.5 Step 5: Refresh the Server

REFRESH the web server .

8.10 Editing, Copying, and Deleting

Once you've created a snippet, snippet group, or snippet category, you can edit, copy, and/or delete it.

To edit an item, click from the list of snippets/groups/categories.

To copy an item, while editing it, click .

To delete an item, click from the list of snippets/groups/categories.

9. Tile Security

Use the **Tile Security** tile of Syntelate Studio to grant or restrict access to tiles in Syntelate Studio.

9.1 How Does It Work?

Syntelate Studio consists of various tiles: the Message Gateway configuration tile, the Worklist Manager Importer tile, and so on. You can grant users no access, read only access, or full access to each tile based on what they need to do in Syntelate Studio.

> **EXAMPLE**
>
> Jack needs to be able to manage the smart text that is available to agents on a web chat, but he doesn't need to be able to configure the way that a web chat looks to customers on his company's website.
>
> An administrator grants Jack full access to the Smart Text Editor tile and no access to the Web Chat configuration tile. The administrator does this by assigning Jack appropriate roles.

Tile security works in conjunction with **roles**, which are managed via the User Configuration tile:

- **User Configuration:** Use this tile to add roles and assign them to users.
- **Tile Security:** Use this tile to define which roles have which access level to each tile. There are three access levels: Full Access, Read Only, and No Access.

Note: For more information about roles, see document User Configuration on page 164.

9.2 What Else Can You Do?

As well as defining roles' access levels, you can do the following from the Tile Security tile:

- Make dormant any tiles that you don't need.
- Change the order in which tiles are shown on the Syntelate Studio home page.

9.3 Tasks

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

9.4 Configuring Access to a Tile

To define which roles have which access level to a tile, follow these steps:

1. From the Tile Security home page, click for a tile. The **Edit settings for <tile name> tile** is shown.
2. For each role, use the dropdown to select that role's access level (either Full Access, Read Only, or No Access).

Tip: Use the **Filter roles** box to filter the list of roles.

Click the **Full Access**, **Read Only**, or **No Access** button to assign that access level to all (filtered) roles.

3. Click .

9.5 Making a Tile Active/Dormant

As well as restricting access to a tile, you can make a tile dormant if you don't need it.

Note: You cannot make the Tile Security or User Configuration tiles dormant.

To make a tile active or dormant, follow these steps:

1. From the Tile Security home page, click for a tile. The **Edit settings for <tile name> tile** is shown.
2. Under **Active**, click **Yes** to make the tile active or **No** to make it dormant.
3. Click .

9.6 Reordering Tiles

You can define the order in which tiles are shown on the Syntelate Studio home page.

Note: On the Syntelate Studio home page, users only see tiles to which they have Read Only access or Full Access.

To move a tile up or down in the tile sequence order, from the Tile Security home page, click or for the tile.

To set a specific sequence number for the tile, follow these steps:

1. From the Tile Security home page, click for the tile. The **Edit settings for <tile name> tile** is shown.
2. In the **Sequence** box, type a sequence number for the tile.

   > **Note:** If you enter a sequence number that is already used by another tile, Syntelate Studio will automatically change the sequence number of the other tile as well as that of any other affected tiles.

3. Click .

10. User Configuration

Use the **User Configuration** tile of Syntelate Studio to manage users and roles.

10.1 What's a User?

A **user** is an account that you can use to log in to Syntelate Studio. A user can be **active** or **dormant** (dormant users cannot log in).

10.2 What's a Role?

You assign a **role** (or **roles**) to a user to give them access to the tiles in Syntelate Studio.

Roles work in conjunction with tile security:

- **User Configuration:** Use this tile to add roles and assign them to users.
- **Tile Security:** Use this tile to define a role's access level to each tile. There are three access levels: Full Access, Read Only, and No Access.

> **Note:** For more information about tile security, see document *Syntelate XA - Tile Security (Studio)*.

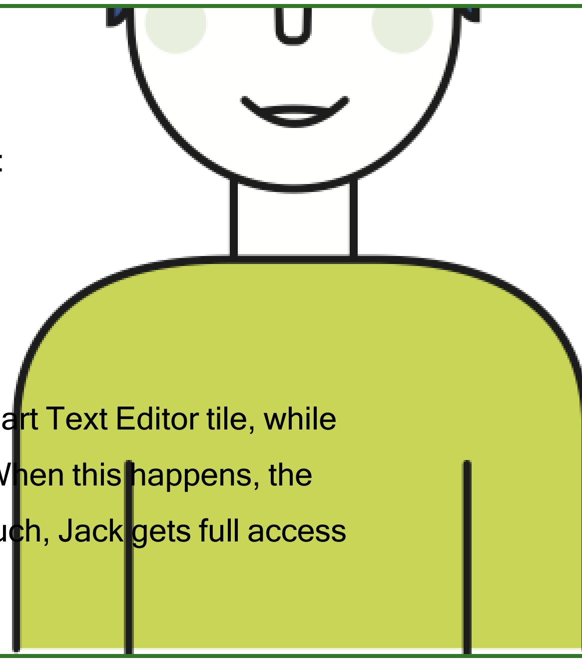
Say you assign two roles to a user, and those roles have clashing access levels for a tile. When this happens, the user is granted the higher access level.

EXAMPLE

Jack has been assigned the following roles:

- Manager
- Supervisor

The Manager role has full access to the Smart Text Editor tile, while the Supervisor role has read only access. When this happens, the user receives the higher access level. As such, Jack gets full access to the Smart Text Editor tile.



10.3 Configure Users vs Configure Roles

From the tile's home page (the **Configuration Options** page), you have two options:

- **Configure Users:** Click to view the **Create or Edit Users** page.
- **Configure Roles:** Click to view the **Create or Edit Roles** page.

10.4 The Super User

Syntelate Studio offers a powerful user account known as the **super user**. You'll have been provided with the log-in details for this account when Syntelate Studio was installed. As the name implies, a super user has the highest level of user permissions.

With a new Syntelate Studio installation, one of the first things that you should do is log in as the super user and then add the other users that you'll need.

After this, you shouldn't need to use the super user much. Any user with full access to the User Configuration tile can add a new user when required.

> **Tip:** The super user can unlock any record, no matter who locked it. Let's say a colleague has gone on holiday and left a record locked: you can log in as the super user to unlock this.

Read the rest of document *Syntelate XA - User Configuration (Studio)* to find out how to configure a user.

10.5 Tasks

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

10.6 Adding a Role

To add a new role, follow these steps:

1. From the **Create or Edit Roles** page, click . The **Create New Role** page is shown.
2. In the **Role Name** box, type a unique name for the role.
3. From **Universes**, select the universes that the new role needs access to.

   > **Note:** When you assign universes to a role, you ensure that users with that role can only see the parts of Syntelate XA that they should see.

4. Under **Users**, select the users who should be assigned this role.

> **Tip:** Use the **Filter users** box to filter the list of display names.
>
> Click the **SELECT ALL** button to assign the role to all (filtered) users.
>
> Click the **REMOVE ALL** button to remove the role from all (filtered) users.

> **Note:** You can also assign roles to users when you're adding or editing a user.

5. Click .

10.6.1 What's Next?

Now that you've added a role, you need to define the role's access level to each tile. For instructions on how to do this, see Configuring Access to a Tile on page 161.

10.7 Adding a User

To add a new user, follow these steps:

1. From the **Create or Edit Users** page, select **Add** +. You see the **Create New User** page.
2. In **User name**, enter a unique user name that the user will use to log in to Syntelate Studio.

> **Note:** Check the user name carefully. You can't edit this after you have created the user!

3. In **Display Name**, enter the name by which the user will be known in Syntelate Studio.

> **EXAMPLE**
>
> Jack's user name is "inisoft_jack", but his display name is "Jack".
>
> Let's say Jack is editing a record in Syntelate Studio: a message gateway configuration. Emily now comes along and tries to edit this record, but she can't because the record is locked. It shows as being locked to "Jack" (Jack's display name).

> **Tip:** Unlike user names, display names don't *have* to be unique. However, if you have two different users with the same first name, you may want to include their surname in their display name. Otherwise things could get

confusing!

4. In **Email**, provide the user's email address.

> **Note:** The same email address cannot be used by more than one Syntelate Studio user.

5. In **Password** and **Confirm New Password**, create and confirm the user's password.

> **Note:** Passwords must be at least 8 characters long and contain:
>
> - An uppercase character
> - A lowercase character
> - A number
> - A non-numeric character

6. Specify whether the user should be active or dormant. (By default, the Active option will be selected.) If the new user should be dormant (not yet able to log in), click **No** for **Active**.

7. Assign one or more universes to the user. Select all that apply.

> **Note:** When you assign universes to a user, you ensure the user can only see the parts of Syntelate XA that they should see.

8. Assign one or more roles to the user. Select the appropriate check boxes.

> **Note:** You can also assign roles to a user when adding or editing a role.

9. **Save** the user configuration.
10. Tell the user their user name and password so that they can log in to Syntelate Studio.

10.8 Deleting a Role

> **Note:** You cannot delete a role if it has been assigned to users. To delete such a role, you must first edit the role to remove it from all users.

To delete a role, follow these steps:

1. From the **Create or Edit Roles** page, click for the role that you want to delete.

   The **Confirm Delete** dialog box appears.

2. Click **DELETE**.

10.9 Editing a Role

To edit the name of a role or the users who are assigned to this role, follow these steps:

1. From the **Create or Edit Roles** page, click for the role that you want to edit.

   The **Editing role <role>** page is shown.

2. In the **Role Name** box, type a new name for the role, if required.

3. Under **Users**, select the users who should be assigned this role.

4. Click .

10.10 Editing a User

> **Note:** You cannot delete a user, but you can make a user dormant (**Active** = **No**). This prevents the user from being able to log in.

To edit a user (including resetting the user's password), follow these steps:

1. From the **Create or Edit Users** page, click for the user that you want to edit.

   The **Edit <user name>** page is shown.

2. Edit **Display Name**, **Email**, **Active**, and/or **User Roles** as required.

   > **Note:** For a description of each of these fields, see Adding a User on page 167.

3. To reset the user's password:

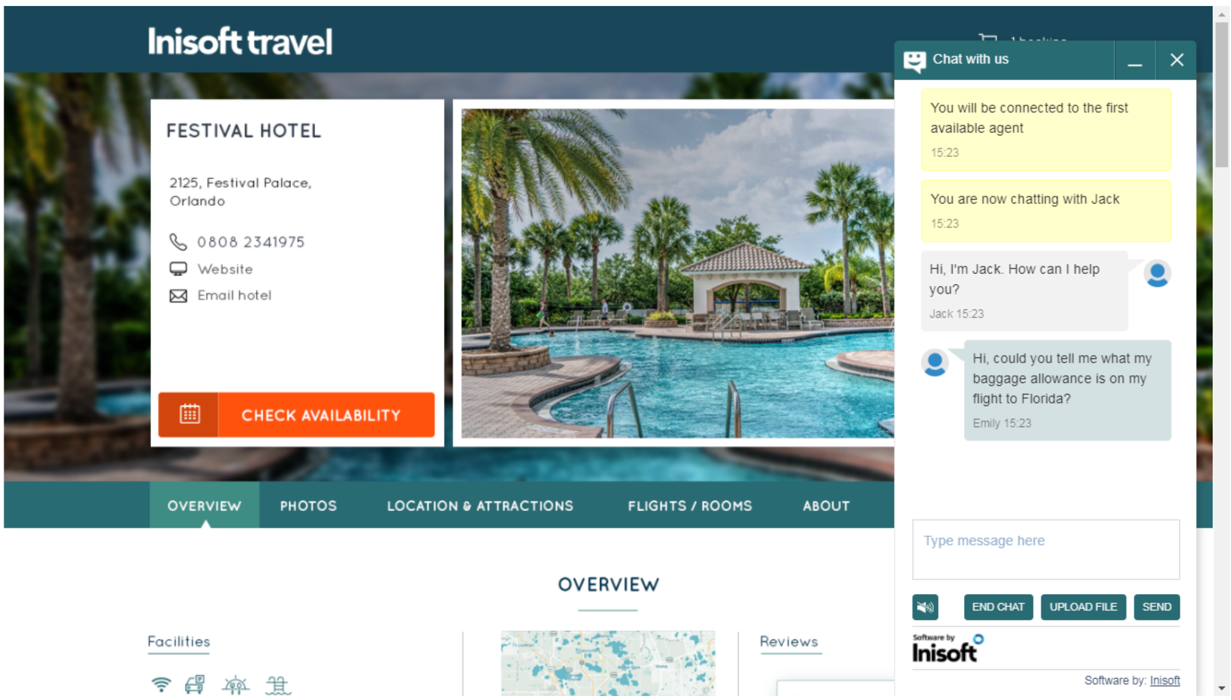
   a. Click **Reset Password**. The **Reset Password** dialog box appears.

   b. Click **RESET PASSWORD**. The user's new password is shown.

   c. Tell the user their new password, and then click **OK** to close the dialog box.

11. Web Chat Config.

Use the **Web Chat Configuration** tile of Syntelate Studio to configure web chat for your company's website.



11.1 What Can You Configure?

You can configure:

- The styling of the web chat (colors, logos, positioning, and so on)
- The file name extensions accepted for attachments (and whether attachments are allowed at all)
- The days and times that web chat is available

- Whether the leave a message form should be used instead of web chat (for example, due to a national holiday)
- Whether the web chat is always visible or whether it appears after a set period of time
- Whether the web chat opens automatically or whether the customer must click it to open it.

You can also configure:

- Which Syntelate XA Universe (database) to use for the web chat interactions
- Whether the web chat will use Voice of the Customer surveys before and after the chat
- Whether to enable Google Translate, and if so, the credentials to use for it.
- The topics that are available for the web chat
- Whether the customer can pick the topic or whether it is selected based on the web page from which they open the chat
- Whether the customer can see how long they have to wait in the chat queue
- Smart text, split into categories, for each different web chat configuration.

> **Tip:** After editing a web chat configuration, you should immediately see your changes reflected in your web chat.
>
> If you do not, then click  from the **Web Chat Configuration** home page to refresh the web server.

11.2 Tasks

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

11.3 Adding a Web Chat

There are two ways to add a new web chat:

- Copy an existing web chat
- Configure a new web chat from scratch

> **Note:** For instructions on copying an existing web chat, see Copying a Web Chat on page 178.

11.3.1 Configuring a Web Chat from Scratch

To configure a new web chat from scratch, follow these steps:

1. From the **Web Chat configuration** home page, click +. The **Web Chat** page is shown.
2. In the **Web Chat name** box, type a name for your web chat.

   > **Note:** This is for your reference only. The name will not be shown to customers or agents.

3. In the **Root URL** box, type the root address of your website to use for this web chat.

EXAMPLE

Jack wants to add web chat to the Inisoft website. He types **http://inisoft.com** into the **Root URL** box.

4. Click .

Your basic web chat details are saved. Additional sections become visible on the **Web Chat** page.

11.3.2 What's Next?

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

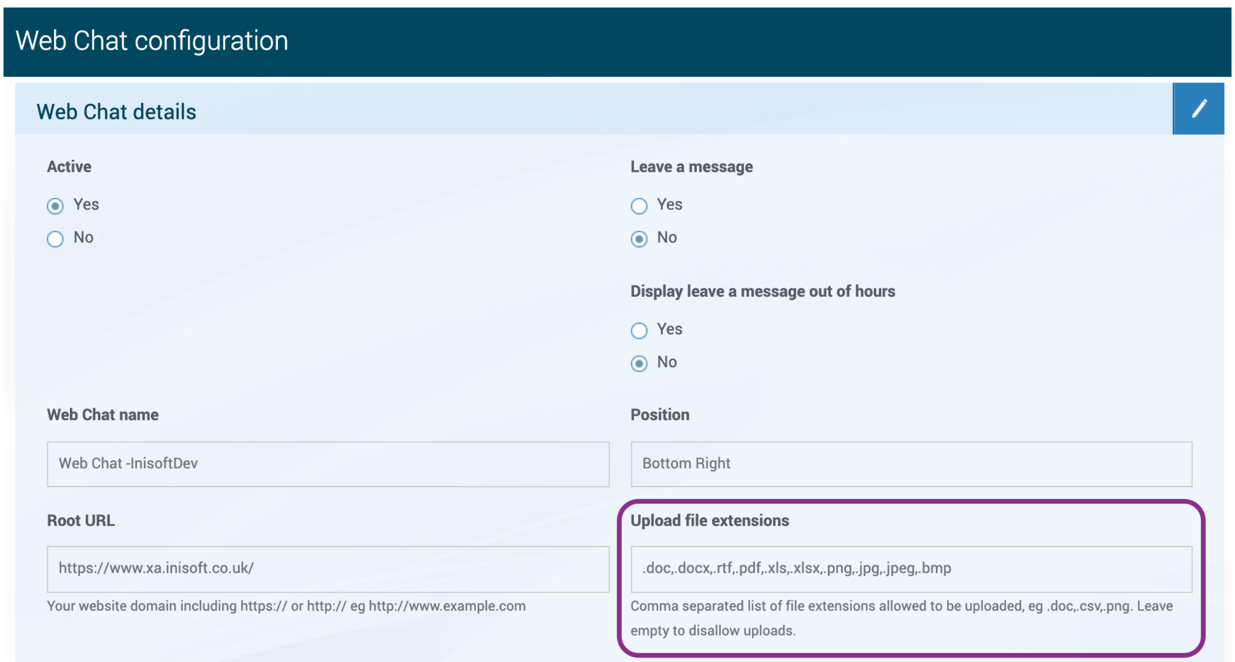
- Styling Your Web Chat on page 198
- Styling Leave a Message on page 198
- Manually Activating Leave a Message on page 192
- Setting Your Web Chat's Availability on page 196
- Configuring Attachments on the next page
- Setting the Topics for Your Web Chat on page 193
- Customizing the Display Options on page 179

Before you can use the web chat on your website, you'll also need to activate it and embed some code in your website. See Making a Web Chat Active/Dormant on page 192 and Embedding a Web Chat in Your Website on page 189.

11.4 Configuring Attachments

You can allow agents and customers to upload attachments to a web chat.

On the **Web Chat Configuration** Web Chat details screen, there is a text box labeled **Upload file extensions**. Use it to specify which file types are allowed.



You must provide some information in **Upload file extensions** to switch on this functionality and display the upload button to the user.

Or, leave it blank if you want to disable this feature. When the field is blank, the upload button displayed on the chat interface will be hidden from the user.

> **Warning:** Be very careful when specifying the file extensions that you will allow. Some file types (such as .exe and .bat) can pose a security threat.

To specify the allowed file types, or to disable uploads, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.

2. In the **Web Chat details** section, click . The fields are unlocked for editing.

3. In the **Upload file extensions** box, type the file extensions that you wish to allow. To disable uploads, leave the box empty.

> **EXAMPLE**
>
> Jack wants agents in his team and their customers to be able to upload Microsoft Word documents and PDFs to their web chats. As such, he types **.doc,.docx,.pdf** into the **Upload file extensions** box.

4. Click .

11.4.0.1 Path and File Size

The path to the location where you will store attachments has to be specified in the web chat message gateway.

The maximum file size of attachments is by default 5 MB, but you can specify something lower or higher. This is also configured in the web chat message gateway.

See document *Syntelate XA - Message Gateway Configuration*.

11.5 Copying a Web Chat

The quickest way to set up a new web chat is usually to copy an existing web chat and edit it as required. This saves you from having to configure every setting from scratch.

11.5.1 Copying an Existing Web Chat

To copy an existing web chat, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to copy. The **Web Chat** page is shown.
2. Click . The **Save as** dialog box appears.
3. In the **Web Chat name** box, type a name for your new web chat.
4. Click **SAVE**.

A new web chat is created with the same details as the source web chat. Your web chat is given a unique ID, which is used in the embed code.

11.5.2 What's Next?

Now that you've copied an existing web chat configuration, you'll want to customize it to meet your needs. See the following tasks:

- Styling Your Web Chat on page 198
- Styling Leave a Message on page 198
- Manually Activating Leave a Message on page 192
- Setting Your Web Chat's Availability on page 196
- Configuring Attachments on page 176
- Setting the Topics for Your Web Chat on page 193
- Customizing the Display Options below

To use the new web chat on your website, you'll also need to embed some code in your website. See Embedding a Web Chat in Your Website on page 189.

11.6 Customizing the Display Options

The **Display options** section of the **Web Chat** page lets you configure how your web chat is displayed (for example, is it always visible or does it only appear after a set number of seconds?).

Maybe you would like the topic to be automatically set based on the web page from which the customer starts the web chat, or for your web chat to only be visible on specific pages of your website. If so, this is where you configure that.

> **Note:** You always need to have a display option for the **Default** URL. This is used for any web page that does not have its own display options.

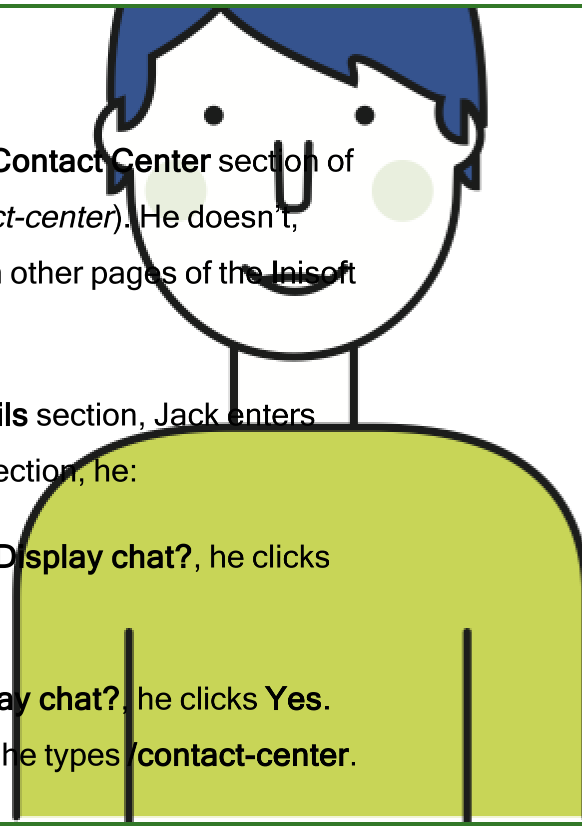
11.6.1 Setting the Web Pages on Which Your Web Chat is Visible

EXAMPLE

Jack wants to configure a web chat for the **Contact Center** section of the Inisoft website (*http://inisoft.com/contact-center*). He doesn't, however, want the web chat to be visible on other pages of the Inisoft website.

In the **Root URL** box of the **Web Chat details** section, Jack enters **http://inisoft.com**. In the **Display options** section, he:

1. Edits the **Default** display option. For **Display chat?**, he clicks **No**.
2. Adds a new display option. For **Display chat?**, he clicks **Yes**. For **Apply display options to pages**, he types **/contact-center**.

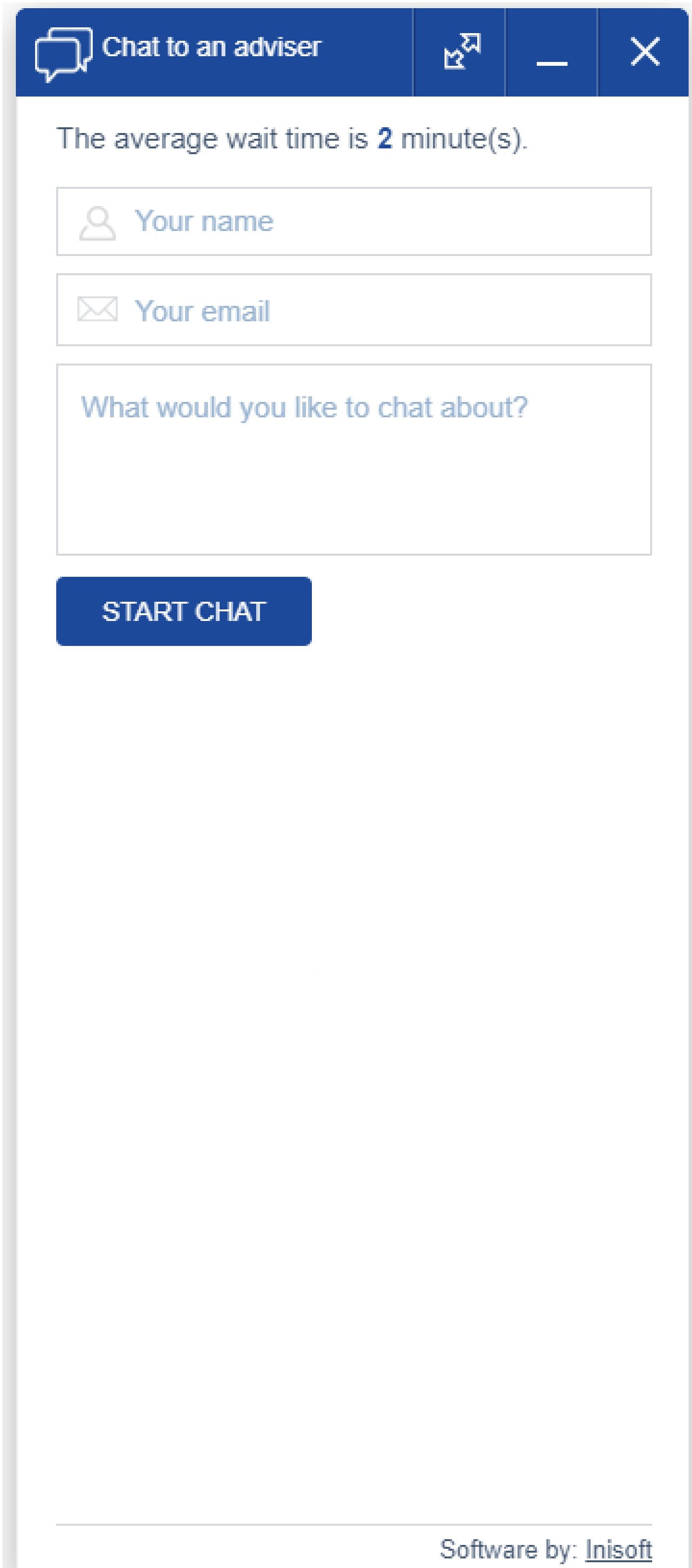


11.6.2 Displaying the Average Wait Time

The **average wait time** can be displayed to the customer. The pre-chat survey has the option to display the average wait time other chat users have experienced in the last hour.

This information can be displayed anywhere on the pre-chat survey as per requirements. The calculation is automatically refreshed at regular intervals that you can set.

Below is an example of a customer's view of the web chat that shows them the average wait time:


Chat to an adviser
The average wait time is 2 minute(s).
Your name
Your email
What would you like to chat about?
START CHAT
Software by: Inisoft

In addition, web chat queue information is available via the **Webchat webAPI**, which allows development teams to display an average wait time on their own websites if they want to promote web chat use. For example, on web-page banners inviting customers to try out the web chat.

11.6.3 Setting the Topic to Be Used for a Specific Web Page

To configure the topic to be used when a customer starts a web chat from a specific web page, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.
2. In the **Display options** section, click +. The **Display options** page is shown.
3. Under **Display chat?**, click **Yes**.
4. In the **Apply display options to pages** box, type the path of the web page.

> **EXAMPLE**
>
> Jack wants a specific topic to be automatically selected when the customer starts a web chat from the **Partners** page of the Inisoft website (*http://inisoft.com/contact-center/partners/*). As such, in the **Apply display options to pages** box, he types **/contact-center/partners/**.

5. Under **Topic**, click **Pick from an existing topic**. A dropdown appears.

> **Note:** If you instead click **Let the customer pick the topic**, the customer will be able to select from all the topics that you've added in the **Available Web Chat topics** section.

6. In the dropdown, select the topic.
7. Click .

11.6.4 Setting the Chat to Display Only after a Set Period of Time

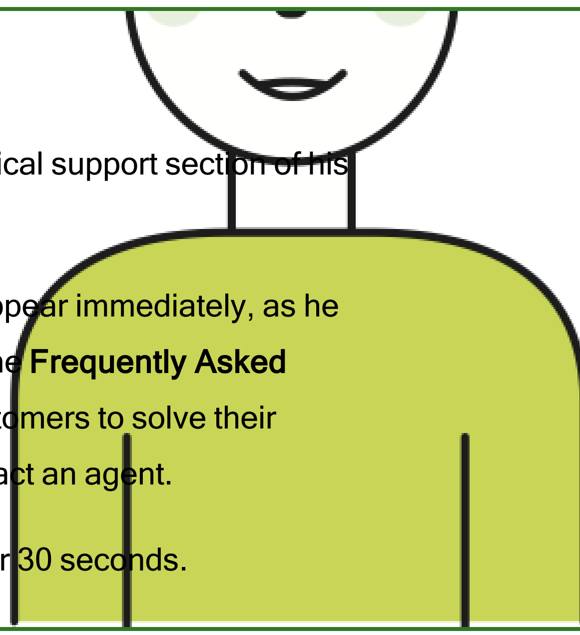
You may only want the web chat button to become visible after the customer has spent a set amount of time on a web page.

EXAMPLE

Jack is configuring a web chat for the technical support section of his company's website.

Jack doesn't want the web chat button to appear immediately, as he would like customers to first skim through the **Frequently Asked Questions** section. This will help many customers to solve their problem themselves without having to contact an agent.

Jack configures his web chat to display after 30 seconds.



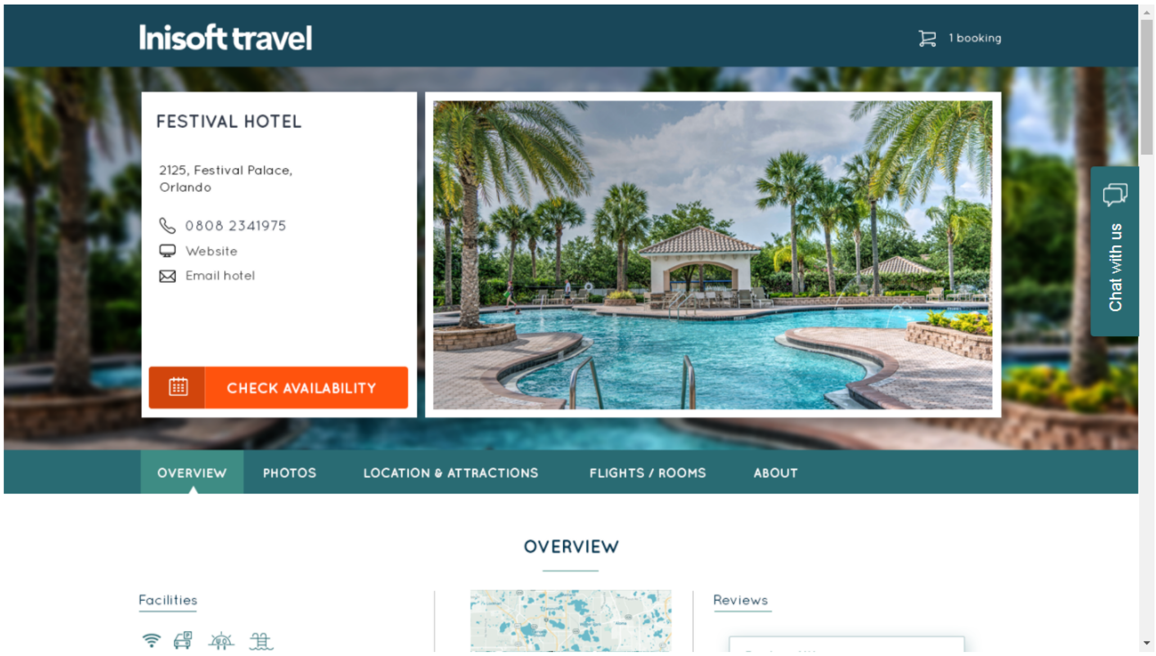
To configure your web chat to display only after a set period of time, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.
2. In the **Display options** section, click for the display option that you want to edit. The **Display options** page is shown.
3. Under **Display after**, click **Display chat after a number of seconds**. A box appears.
4. In the box, type the number of seconds after which the web chat should be displayed.
5. Click .

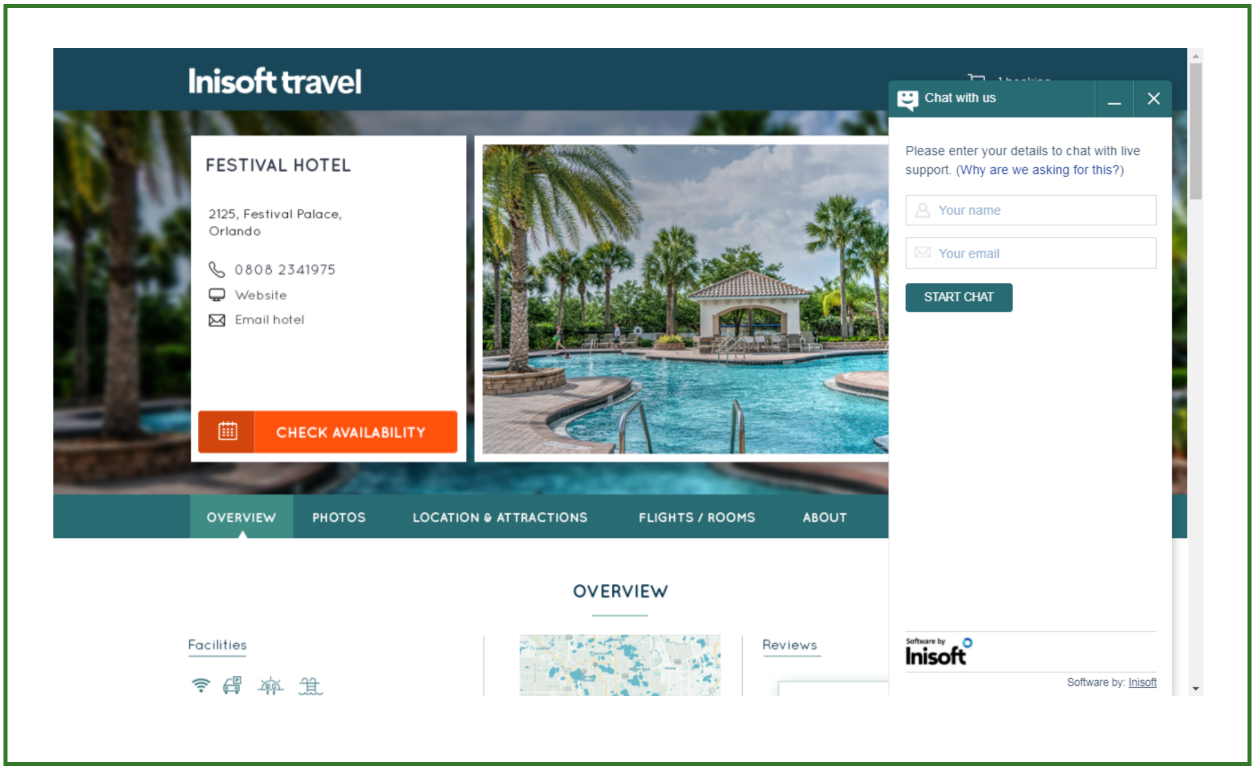
11.6.5 Setting the Chat to Automatically Open after a Set Period of Time

By default, the customer has to click the web chat button to open the web chat. If you wish, you can instead configure your web chat to open automatically after a set number of seconds.

> **EXAMPLE**
>
> When a customer first visits the Inisoft Travel website, the web chat button is shown on the right-hand side.



If he wished, Jack at Inisoft Travel could configure the web chat to open automatically after, say, 30 seconds.



To configure your web chat to automatically open after a set period of time, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.

2. In the **Display options** section, click  for the display option that you want to edit. The **Display options** page is shown.

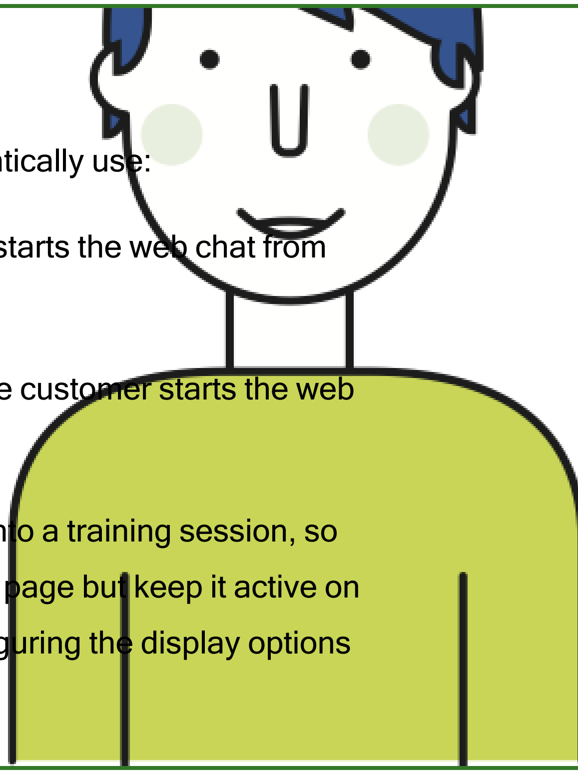
3. Under **Open after**, click **Automatically open Web Chat after a number of seconds**. A box appears.

4. In the box, type the number of seconds after which the web chat should

automatically open.

5. Click .

11.6.6 Disabling Chat on a Specific Web Page



EXAMPLE

Jack has configured his web chat to automatically use:

- The **Inquiry** topic when the customer starts the web chat from the **Contact Us** page
- The **Technical Support** topic when the customer starts the web chat from the **Help** page

The technical support staff have just gone into a training session, so Jack wants to disable web chat on the **Help** page but keep it active on the **Contact Us** page. He does this by configuring the display options for the **Help** page.

To disable web chat on a specific page, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.
2. In the **Display options** section, click for the display option that you want to edit.

The **Display options** page is shown.

3. Under **Display chat?**, click **No**.

4. Click .

11.7 Deleting a Web Chat

If you want to turn off a web chat but think you might use it again, make it dormant. See Making a Web Chat Active/Dormant on page 192.

If you know you're never going to use the web chat again, you can delete it.

To delete a web chat, follow these steps:

1. From the **Web Chat configuration** home page, click **DELETE** for the web chat that you want to delete. The **Confirm Delete** dialog box appears.

2. Click **DELETE**.

11.8 Embedding a Web Chat in Your Website

Once you're happy with the configuration of your web chat, the next step is to add a small piece of code to each page of your website on which the chat should be visible.

To add the embed code to your website, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you wish to add to your website. The **Web Chat** page is shown.

2. In the **Web Chat details** section, copy the contents of the **Embed code for Web Chat** box.

3. For each page of your website on which you want the web chat to be visible, paste

the embed code inside the <head> element, for example:

```
<!DOCTYPE html>

<html>

  <head>

    <title>Web Page Title</title>

    <!--Inisoft WebChat Code -->

    <script type="text/javascript" src="xxx"></script>

    <script type="text/javascript" src="yyy"></script>

    <script type="text/javascript" src="zzz"></script>

    <!--End of Inisoft WebChat Code -->

  </head>

  <body>
```

Note: The embed code is unique for each web chat that you create. In the example above, *xxx*, *yyy*, and *zzz* represent unique URLs for a web chat.

11.9 Making a Web Chat Active/Dormant

By default, a new web chat is dormant. To make it appear on your website, you need to activate it.

> **Note:** At any time you can set the web chat back to dormant. When you do this, the web chat will not appear on your website (and neither will the leave a message form).

To make a web chat active or dormant, from the **Web Chat configuration** home page, click **MAKE ACTIVE** / **MAKE DORMANT** for the web chat.

> **Note:** You can also make a web chat active or dormant using the **Yes**/**No** radio buttons under **Active** on the **Web Chat** page.

11.10 Manually Activating Leave a Message

After you have created a leave a message gateway, in **Message Gateway Configuration**, you can manually activate it in **Web Chat Config**.

You can activate leave a message in two different ways:

- You can manually turn it on (for example, when no agents will be working due to a national holiday). See below.

- You can configure it to be used when the customer has not been connected to an agent within a set amount of time. This is configured as part of the web chat message gateway. For more information, see **Step 10: Timer for Leave a message prompt** in **Edit Universe Settings** in document *Syntelate XA - Message Gateway Configuration*.

To manually activate leave a message for your web chat, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.
2. In the **Web Chat details** section, click . The fields are unlocked for editing.
3. Under **Leave a message**, click **Yes**.
4. Click .

Until you turn off this setting, all customers who visit your website will be prompted to leave a message and will not be able to start a web chat.

11.11 Setting the Topics for Your Web Chat

By default, your web chat will use all of the web chat topics that you've configured. To limit your web chat to use a specific set of topics, you need to define these in the web chat configuration.

> **Note:** To configure the web chat topics themselves, use the **Message Gateway Configuration** tile. For full details on what a topic controls, see document *Syntelate XA - Message Gateway Configuration*.

You can also configure whether the customer will be able to select the topic or whether this should be automatically set based on the web page from which the customer opens the web chat. For instructions on configuring this, see Customizing the Display Options on page 179.

11.11.1 Adding a Topic

To add a new topic to the web chat, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.
2. In the **Available Web Chat topics** section, click +. The **Add Web Chat topic** page is shown.
3. To control the order in which your topic is listed, edit the **Sequence** field. By default, Syntelate Studio adds your new topic after all other topics.

> **Note:** The sequence is used by the **Select chat topic** dropdown in the web chat widget.

4. In the **Web Chat topic** dropdown, select the topic that you want to add.
5. Click .

11.11.2 Editing a Topic

If you want to change a web chat topic that you've previously added, you can edit it. This is quicker than deleting it and then adding a replacement. To do this, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.
2. In the **Available Web Chat topics** section, click for the topic that you want to change. The **Edit Web Chat topic** page is shown.
3. In the **Web Chat topic** dropdown, select the new topic.
4. Click .

> **Note:** If you just want to edit the topic sequence, use the and buttons in the **Available Web Chat topics** section of the **Web Chat** page.

11.11.3 Deleting a Topic

To delete a topic from your web chat, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.
2. In the **Available Web Chat topics** section, click for the topic that you want to delete. The **Confirm Delete** dialog box appears.
3. Click **DELETE**.

11.12 Setting Your Web Chat's Availability

You can define the days and times when your web chat will be available on your website. If a customer visits your website outside of these times, they will not see the web chat widget.

> **Note:** If you do not define specific days and times when your web chat will be available, then it will always be available.

11.12.1 Adding a Time

To specify a day and time when your web chat will be available, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.
2. In the **Web Chat availability** section, click +. The **Add day Web Chat is active** page is shown.
3. In the **Day Web Chat is active** dropdown, select the day that you want to add a time for. You can also select **Every day**.
4. In the **Start time** field, type the time at which the web chat will become available. The time should be in the format **hh:mm**.
5. In the **End time** field, type the time at which the web chat should stop being available.
6. Click .

11.12.2 Editing a Time

If you have already defined a day and time when your web chat will be available, you can edit this. To do so, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.
2. In the **Web Chat availability** section, click for the day and time that you want to edit. The **Edit day Web Chat is active** page is shown.
3. Edit the **Day Web Chat is active**, **Start time** and/or **End time** fields.
4. Click .

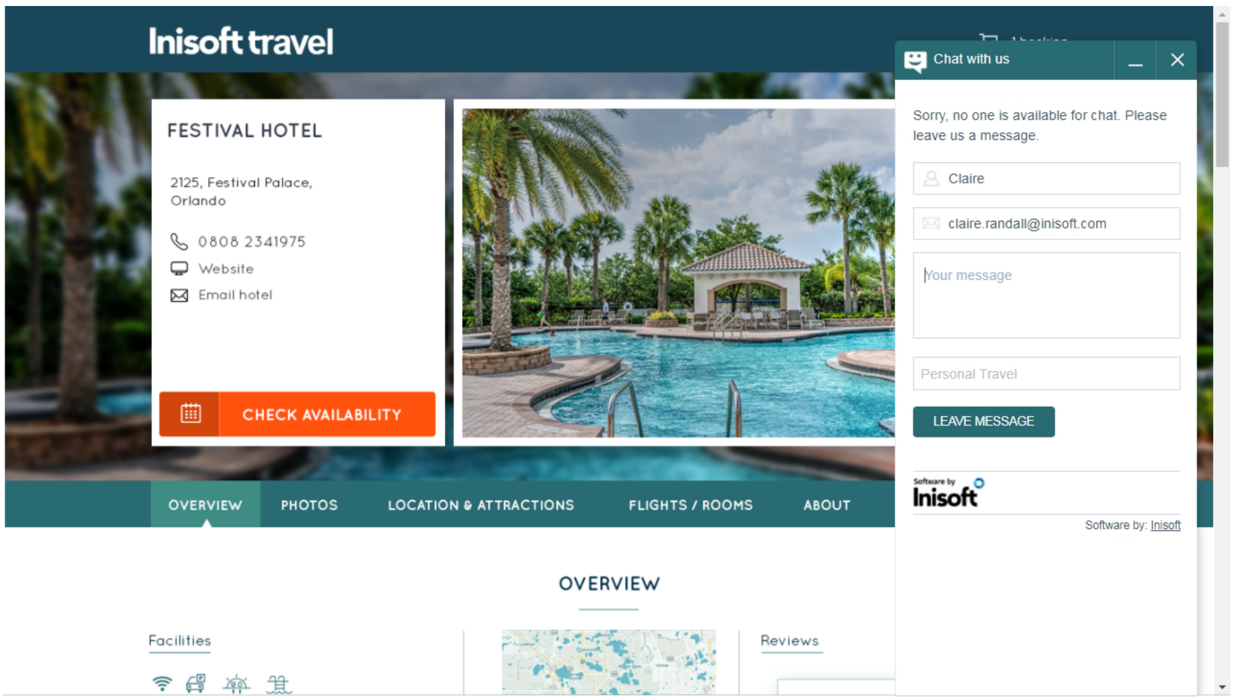
11.12.3 Deleting a Time

To delete a day and time that you have scheduled for your web chat to be available, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.
2. In the **Web Chat availability** section, click for the day and time that you want to delete. The **Confirm Delete** dialog box appears.
3. Click **DELETE**.

11.13 Styling Leave a Message

You can customize the styling of the leave a message form in the same ways that you can customize the styling of your web chat.



See [Styling Your Web Chat]() below for full instructions – just make sure to use the **"Leave Message" options** section of the **Web Chat** page rather than the **"Let's Chat" options** section.

11.14 Styling Your Web Chat

Syntelate Studio offers lots of options for styling how your web chat will look on your website.

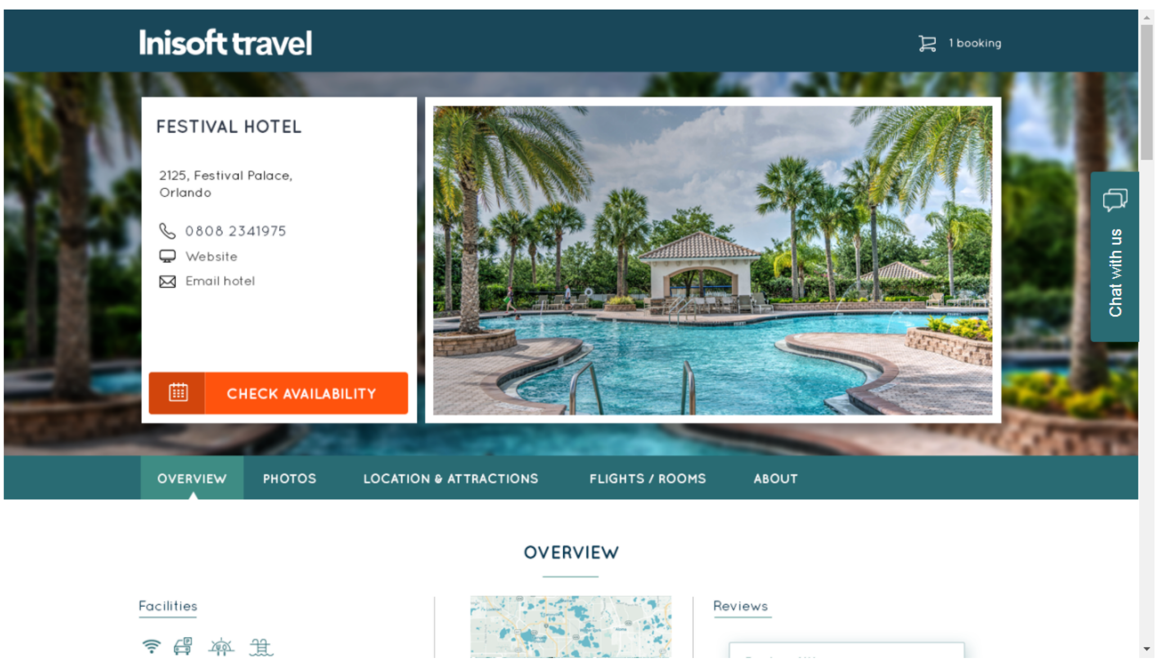
11.14.1 Setting the Position

You can configure your web chat to appear in one of the following positions on your website:

- Left-hand side
- Bottom left
- Bottom right
- Right-hand side

EXAMPLE

Inisoft Travel have set the position of their web chat to the right-hand side.



To set the web chat position, follow these steps:

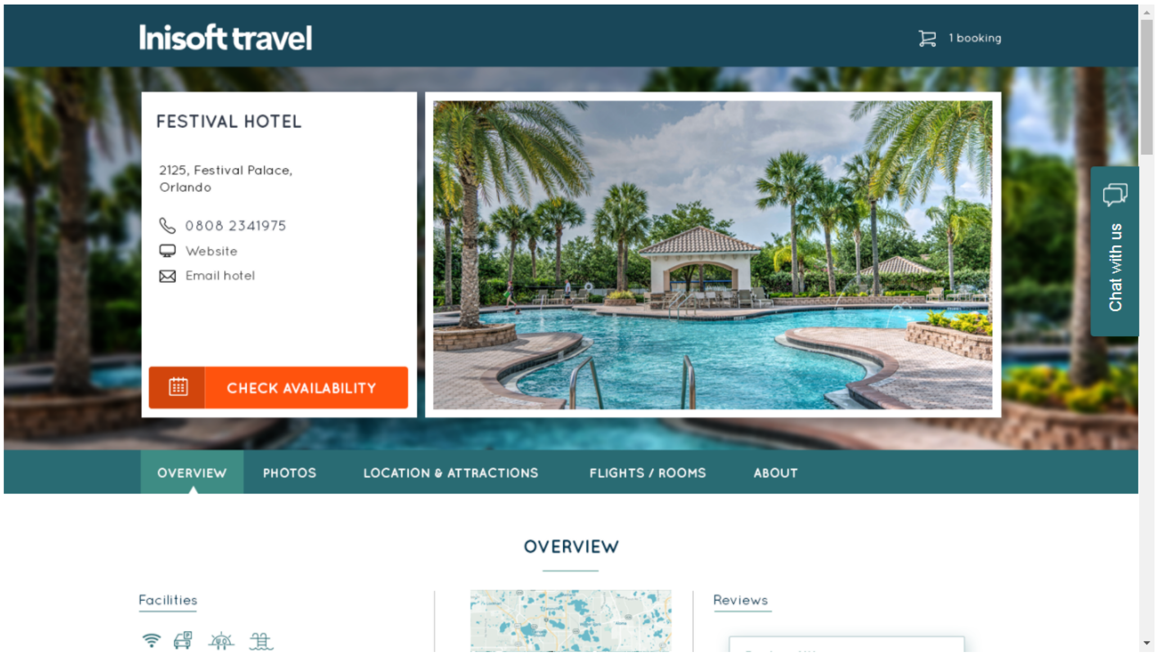
1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.
2. In the **Web Chat details** section, click . The fields are unlocked for editing.
3. In the **Position** dropdown, select the position for the web chat.
4. Click .

11.14.2 Setting the Title

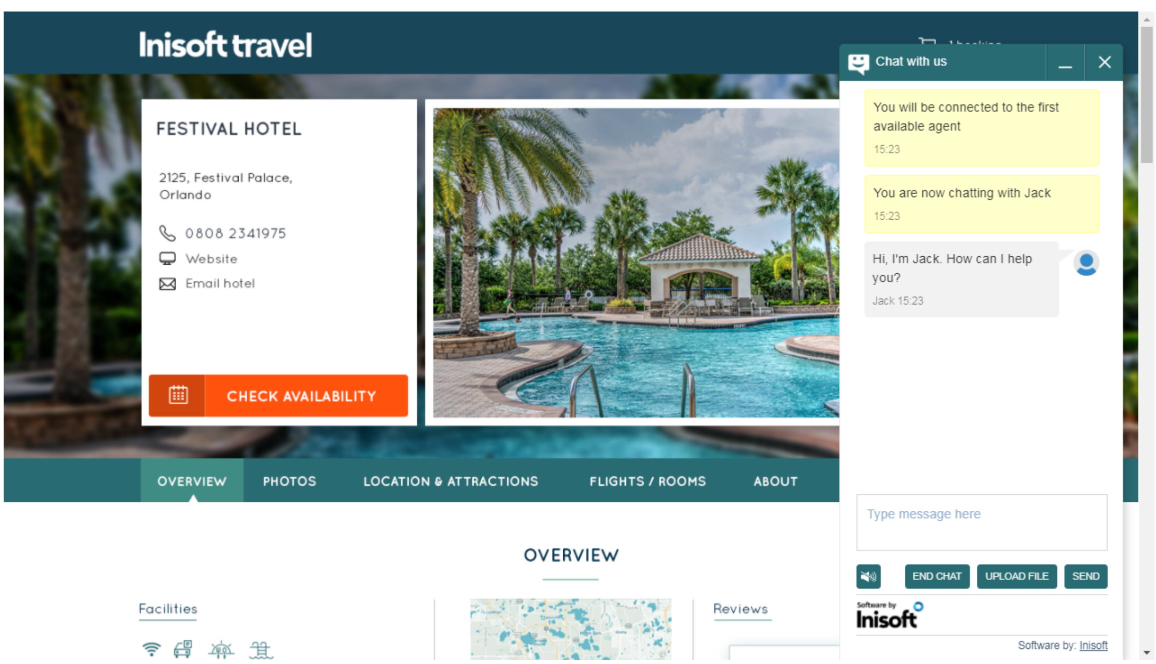
You can set the title of your web chat.

EXAMPLE

Inisoft Travel have set the title of their web chat to **Chat with us**. The title is shown on the button that the customer clicks to start a chat.



During a web chat, the title is also displayed at the top.



To set the web chat title, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.
2. In the **"Let's Chat" options** section, click . The fields are unlocked for editing.
3. In the **Title text** box, type a title for your web chat.
4. Click .

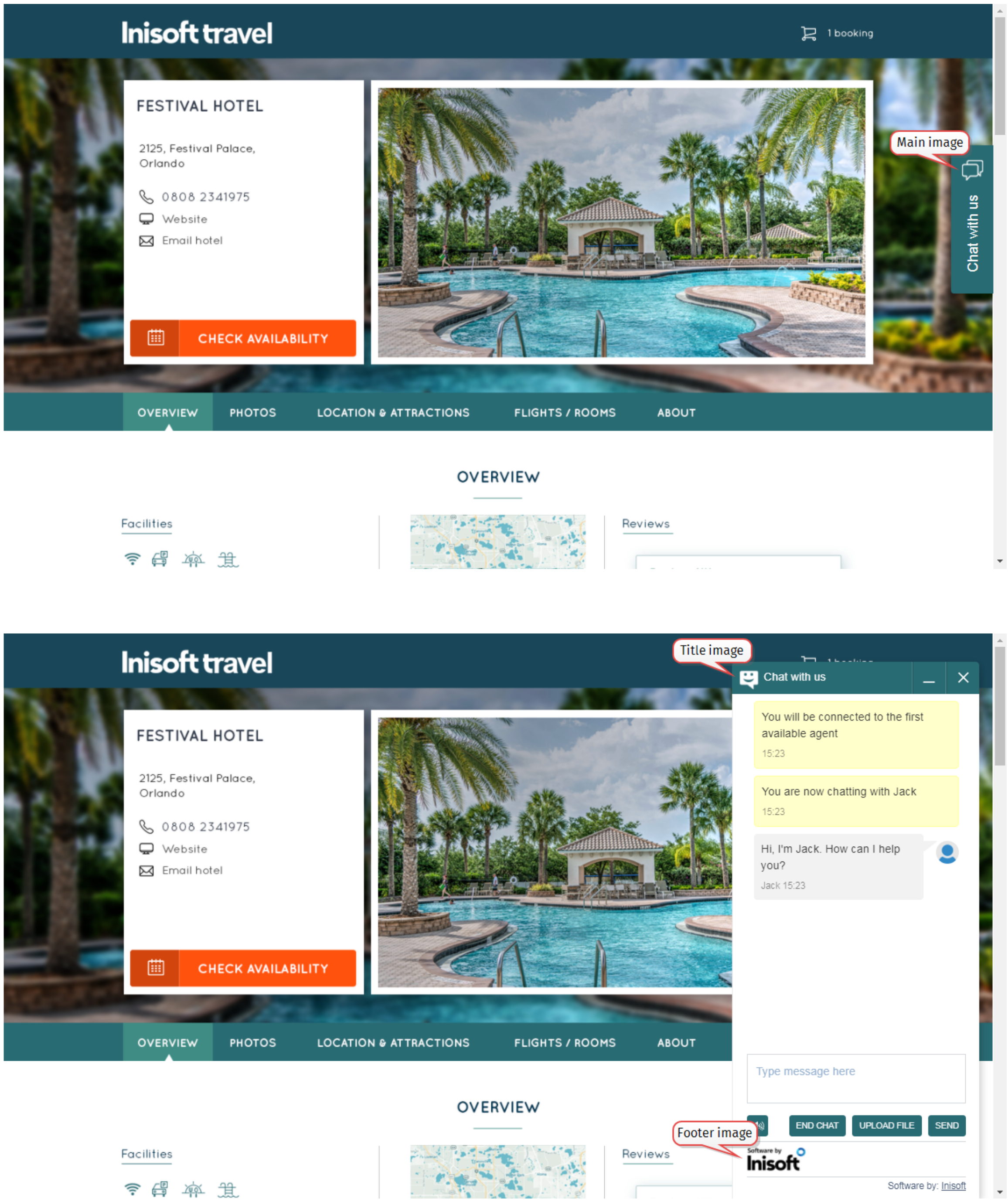
11.14.3 Setting the Images

Syntelate Studio lets you set three different images for your web chat:

- Main image
- Title image
- Footer image

EXAMPLE

The following screenshots show the images that Inisoft Travel have set for their web chat.



Note: If you wish, you can also set for no images to be used.

To set the web chat images, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.

2. In the **Web Chat details** section, click . The fields are unlocked for editing.

3. Under **Main image source**, click **No image** (if you do not want to use an image), **Predefined image** (to select one of the default images), or **Uploaded image** (to upload a new image).

4. If you selected **Predefined image**:

    a. Under **Select an image**, click the image that you want to use.

    b. In the **Main image position** dropdown, select whether the image should be left, center, or right aligned.

    > **Note:** The **Main image position** dropdown is only visible for web chats with a position of bottom left or bottom right.

5. If you selected **Uploaded image**:

    a. Click **BROWSE FILE** to open the **Open** dialog box.

    b. Select your image, and then click **Open**.

    > **Note:** Your image must have one of the following file name extensions: .gif, .jpg, .jpeg, .png.
    >
    > For best results, use an image that is 30 x 30 pixels. You *can* upload an image with different dimensions, but it will be resized to 30 x 30 pixels.

    c. In the **Main image position** dropdown, select whether the image should be left, center, or right aligned.

    > **Note:** The **Main image position** dropdown is only visible for web chats with a position of bottom left or bottom right.

6. Repeat steps 2-4 for **Title image source** and **Footer image source**.

7. Click .

11.14.4 Setting the Web Chat Color

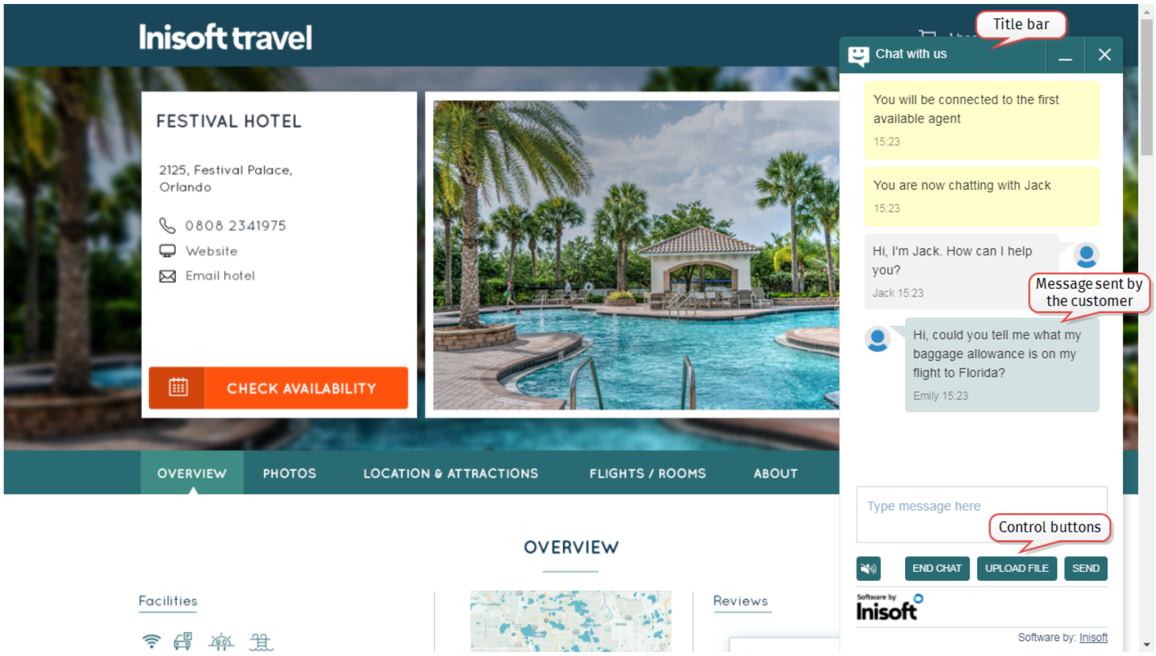
You can set the color for your web chat. This color is used for:

- The button that the customer clicks to start the web chat
- The title bar
- The control buttons (for example, **START CHAT** and **SEND**)
- Customer messages

Note: An opacity of 0.2 is applied to the background color for customer messages.

EXAMPLE

Inisoft Travel have set their web chat color to HEX color code #296B73 (a greenish-blue).



To set the web chat color, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.
2. In the **"Let's Chat" options** section, click . The fields are unlocked for editing.
3. Under **Web Chat widget color**, click **Selected color**. A box appears.
4. Click the box and then select a color, or type the HEX color code if you know it.
5. Click .

11.14.5 Setting the Text Color

You can set the text color for the web chat. This color is used for:

- The title
- The button text (for example, **START CHAT** and **SEND**)

> **Note:** This color is not used for message text.

To set the text color, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.
2. In the **"Let's Chat" options** section, click . The fields are unlocked for editing.
3. Click the **Text color** box and then select a color, or type the HEX color code if you know it.
4. Click .

11.14.6 Advanced Styling

You can further customize the styling of your web chat using CSS (cascading style sheets).

> **Note:** This is an advanced option. You should only use this option if you are familiar with CSS.

To add custom CSS to your web chat, follow these steps:

1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.

2. In the **Web Chat details** section, click . The fields are unlocked for editing.

3. In the **Custom CSS** box, type your CSS. The following table shows the selectors that you can use.

> **Warning:** Do not use any other selectors in the **Custom CSS** box. This could affect the styling of your website.

CSS selector	HTML element
#inisoftChatContainer	div for the web chat plugin
#inisoftWantToChat	div for the web chat button (when web chat is closed)
#inisoftLetsChatLogo	img for the main image (when web chat is closed)
#inisoftLetsChatLabel	span for the title of your web chat (when web chat is closed)
#inisoftChatHeader	div for the title bar (when web chat is open)
#inisoftChatHeaderTitle	div for the image and text in the title bar (when web chat is open)
#inisoftchatHeaderBtns	div for the minimize and close buttons in the title bar

CSS selector	HTML element
	(when web chat is open)
#inisoftChatClientContent	div for the chat interface (when web chat is open)

4. Click .

12. Worklist Exporter

Use the **Worklist Manager Exporter** tile of Syntelate Studio to export data from the INTERACTION_X table of a universe.

12.1 Export Sources

You can export data to the following formats:

Export Format	File Name Extension
Database	-
Microsoft Excel workbook	.xlsx (only)
Comma-separated values file	.csv
Text file	.txt

You can run exports on demand or schedule them to be run at specified intervals.

12.2 Design/Published, Active/Dormant

For each export, you can have a **design** and/or a **published** version. This lets you edit the details of an export (in the design version) while the published version remains active. When you are happy with the design version, you can then publish it, and it becomes the new published version.

Additionally, an export can be **active** or **dormant**. If you define a schedule for an export, it will only run at the defined times if it is both published *and* active.

12.3 Tasks

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

12.4 Adding an Export

To add an export, first follow these steps:

1. From the Worklist Manager Exporter home page, click **EXPORT DATA** for the INTERACTION_X table from which you wish to export data. A list of all exports for that INTERACTION_X table is shown (if any exist).
2. Click +.

The export is created immediately. Next, follow the steps below to set it up.

12.4.1 Step 1 - Select Export Type

1. In the **Export Name** box, type a name for your export.
2. In the **Export Category** dropdown, select whether you want to run the export on demand or schedule it.
3. Click →.

12.4.2 Step 2 - Select Export Target

1. In the **Export Type** dropdown, select the format in which you wish to export records.

2. If you selected **Database** for **Export Type**, then select the database and table to which records should be exported in the **Database** and **Table** dropdowns.

   > **Note:** The **Database** dropdown is populated using the CONNECTIONLIST database table.

3. If you selected a file format for **Export Type** *and* you selected **Scheduled** in Step 1, then:

   a. In the **File Name** box, type the full path of the export file.

      > **Note:** You must type the full UNC path of the file, including the file name and file name extension. You *cannot* export files to a C: drive.

   b. In the **What do you want to do with the old file?** dropdown, select what Syntelate Studio should do if the specified file already exists. The options are:

      - **Append to file:** Add the exported data to the end of the file.
      - **Replace file:** Overwrite the file with the exported data.
      - **Create new file:** Create a new file each time that the export is run by adding the date and time of the export to the file name.

4. Click →.

12.4.3 Step 3 - Export Fields Mapping

On this page, select the fields that you want to export from the INTERACTION_X table. When exporting to a database, you must map each field to a field in the export database.

As well as exporting fields from the INTERACTION_X table, you can populate fields in an export with:

- **User value:** Populate the field with a specific value. This value is used for all exported records.
- **Pre-defined date function:** Populate the field with the current date, current time, or current date and time.

For databases, Syntelate Studio's Auto Mapping functionality automatically maps fields that have the same name in the source INTERACTION_X table and the export database table (ignoring differences in case). To automatically map fields, click .

If you're exporting to a file and wish to export *all* fields in the INTERACTION_X table, click .

> **Warning:** If you have already manually selected fields to be exported, then clicking will clear these. A dialog box warns you of this. Click **MAP** / **EXPORT ALL** to proceed.

To manually specify a field to be exported, follow these steps:

1. Click [+]. The **Add Export Field** dialog box appears.
2. In the **Sequence** box, type the sequence number of the field. For example, if you want the field to be the second field in each exported record, type **2**.

> **Tip:** You can also click ▲ or ▼ to change the sequence number.

> **Note:** If you enter a sequence number that is already used by another field, Syntelate Studio will automatically change the sequence number of the other field as well as that of any other affected fields.

3. Either:
    a. Click **Worklist field** and select the field in the INTERACTION_X table that you want to export.
    b. Click **From user value** and type the value that you want to use for this field in each exported record.
    c. Click **From pre-defined date function** and select either **Current Date**, **Current Time**, or **Current Date and Time**.
4. In the **Target field** box, either:

- **For a database export:** Select the field in the export database to map to.
- **For a file export:** Type the column heading to use in the exported file.

> **Tip:** To use the column name of the INTERACTION_X table as the column heading, click **USE AS TARGET FIELD NAME**.
>
> In the next step, you can select whether or not you want column names to appear in the export file.

5. Click **MAP**.

To edit a field, click for the field. This shows the **Edit Export Field** dialog box. You can also click or to edit the sequence number of the field.

To clear a field from the export list, click for that field. A dialog box appears. Click **DELETE**.

To clear all fields from the export list, click . A dialog box appears. Click **CLEAR ALL**.

Once you've selected all the fields that you want to include in your export, click .

12.4.4 Step 4 - File Export Settings

> **Note:** This step applies to file exports only.

1. To export the column names of the INTERACTION_X table as the first row of your file, click **Yes** for **Should the first row have the field names?**

2. For exports to a Microsoft Excel workbook only, type the name of the worksheet into which you wish to export data in the **Worksheet Name** box.

3. For exports to a comma-separated values file or text file only, type the character that should surround each value in the **Text Qualifier** box.

> **EXAMPLE**
>
> Let's say that you want to export data in the following format:
>
> ```
> "First name";"Surname"
> "Jack";"Atkins"
> "Emily";"Wightman"
> ```
>
> Here the text qualifier is **"** and the delimiter is **;**. Column names *have* been exported as the first row of the export.

4. For exports to a text file only, type the character that should separate each value in the **Delimiter** box.

> **Tip:** Type **\t** to separate the values by tabs.

5. In the **Date & Time Format**, **Date Format**, and **Time Format** boxes, type the format to use for date and/or time fields in your export file.

Notation

You can use the following notation in the date and/or time fields:

Format specifier	Description
d	The day of the month, from 1 through to 31.
dd	The day of the month, from 01 through to 31.
ddd	The abbreviated name of the day of the week, for example “Mon”.
dddd	The full name of the day of the week, for example “Monday”.
h	The hour, using the 12-hour clock from 1 to 12.
hh	The hour, using the 12-hour clock from 01 to 12.
H	The hour, using the 24-hour clock from 0 to 23.
HH	The hour, using the 24-hour clock from 00 to 23.
m	The minute, from 0 through to 59.
mm	The minute, from 00 through to 59.
M	The month, from 1 through to 12.
MM	The month, from 01 through to 12.

Format specifier	Description
MMM	The abbreviated name of the month, for example “Jan”.
MMMM	The full name of the month, for example “January”.
tt	The AM/PM designator.
yy	The year, from 00 to 99.
yyyy	The year, from 0000 to 9999.

6. Click →.

12.4.5 Step 5 - Export Filter

On this page, you can optionally filter the records to be exported from the INTERACTION_X table.

To do this, in the **Where clause** box, type a SQL WHERE clause condition.

> **Tip:** Double-click a common check or worklist field to add it to your WHERE clause.
>
> To see a 5-row extract of the results returned by your query, and to validate your SQL, click **CHECK SQL**.

When you’re done, click →.

12.4.6 Step 6 - Export Schedule

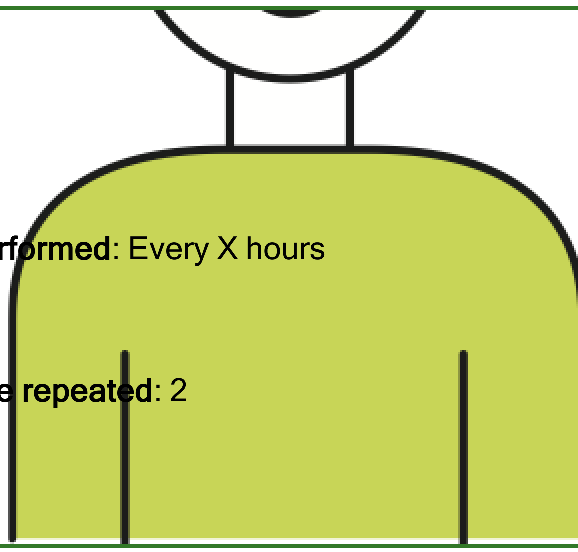
Note: This step applies to scheduled exports only.

To define when the export should be run, follow these steps:

1. In the **When should the export be performed** dropdown, select whether the export should be performed once / **Every X second(s)** / **Every X minute(s)** / **Every X hours(s)** / **Every X day(s)** / **Every X week(s)**.

2. If you selected **Every X ...(s)** for **When should the export be performed**, then in the **How often should the export be repeated** box, type a number representing the X.

EXAMPLE



Jack enters the following details:

- **When should the export be performed**: Every X hours (s)
- **How often should the export be repeated**: 2

Jack's export runs every 2 hours.

3. In the **Date** and **Time** boxes under **Schedule Begins**, enter the date and time when the export should first be run.

4. *(Optional)* In the **Date** and **Time** boxes under **Schedule Ends**, enter the date and time after which the export should no longer be run.

Next, you can add one or more email addresses to which an automated email will be sent whenever your export is successfully run and/or whenever it fails. For more information about how to do this, see Managing Export Emails on page 223.

When you're done, click .

12.4.7 Step 7 - Export configuration complete

You have now configured your export.

To run it now, click .

To publish it and make it active, click .

To publish it and make it dormant, click . You can make it active later.

12.5 Deleting an Export

You can delete a design or a published version of an export, although a published version can only be deleted so long as it has not been run. If your export only has one version (either published or design), then deleting this deletes the export altogether.

To delete a version of an export, follow these steps:

1. From the Worklist Manager Exporter home page, click **EXPORT DATA** for the INTERACTION_X table for which you have set up your export. A list of all exports for that INTERACTION_X table is shown.

2. From your export's **Published** or **Design** tab, click **DELETE**. The **Confirm Delete** dialog box appears.

3. Click **DELETE** / **DELETE BOTH**.

> Tip: The **DELETE BOTH** option is only available when you try to delete a published version of an export for which a design version also exists. This option deletes both versions.

12.6 Editing an Export

You can edit a published or a design version of an export.

> **Note:** If you try to edit a published version of an export for which a design version already exists, you will be asked whether:
>
> - You wish to edit the design version instead.
> - You wish to replace the design version with the published version.

To edit an export, follow these steps:

1. From the Worklist Manager Exporter home page, click **EXPORT DATA** for the INTERACTION_X table for which you have set up your export. A list of all exports for that INTERACTION_X table is shown.

2. From your export's **Published** or **Design** tab, click **EDIT**.

> **Tip:** For instructions on how to configure an export, see Adding an Export on page 212.

12.7 Making an Export Active/Dormant

You can make an export active or dormant when publishing it from **Step 7 - Export configuration complete**. Just click or .

Additionally, you can make a published export active or dormant anytime by following these steps:

1. From the Worklist Manager Exporter home page, click **EXPORT DATA** for the INTERACTION_X table for which you have set up your export. A list of all exports for that INTERACTION_X table is shown.

2. Click **MAKE ACTIVE** / **MAKE DORMANT** for your export.

12.8 Managing Export Emails

On **Step 6 - Export Schedule**, you can configure Syntelate Studio to send an automated email report to one or more email addresses whenever your export is successfully run and/or whenever your export encounters an error.

> **Note:** For Syntelate Studio to send automated emails, you must set up an SMTP Configuration on page 141.
>
> For more information, see document *Syntelate XA - Managing Studio*.

12.8.1 Adding an Email Address

To add an email address, follow these steps:

1. In the **Send Email once export is complete** section, click @+. The **Add new email address** dialog box is shown.
2. In the **Email Address** box, type the email address to which the automated email should be sent.
3. Use the check boxes to select whether the email should be sent when the export is successfully run and/or when the export fails.
4. Click **SAVE**.

12.8.2 Editing an Email Address

To edit an email address, follow these steps:

1. In the **Send Email once export is complete** section, click for the email address that you want to edit. The **Edit email address** dialog box is shown.
2. Edit the **Email Address** box and/or the check boxes as required.
3. Click **SAVE**.

12.8.3 Deleting an Email Address

To delete an email address, follow these steps:

1. In the **Send Email once export is complete** section, click  for the email address that you want to delete. The **Confirm Delete** dialog box appears.
2. Click **DELETE**.

12.9 Manually Running an Export

You can manually run an export from **Step 7 - Export configuration complete**. Just click .

Additionally, you can run a published export anytime by following these steps:

1. From the Worklist Manager Exporter home page, click **EXPORT DATA** for the INTERACTION_X table for which you have set up your export. A list of all exports for that INTERACTION_X table is shown.
2. Click **RUN EXPORT** for your export. The **Export Details** page is shown.
3. Click .

13. Worklist Importer

Use the **Worklist Manager Importer** tile of Syntelate Studio to import records into an INTERACTION_X table. Usually these records will be outbound calls for your agents to make.

The Worklist Engine will then pick up each record at the appropriate time and pass it to an appropriate agent.

13.1 Import Sources

You can import data from the following sources:

Data Source	File Name Extension
Database	-
Microsoft Excel workbook	.xlsx (only)
Comma-separated values file	.csv
Text file	.txt
JSON (via a call to a web API)	-

For the first four data sources, you can run imports on demand or schedule them to be run at specified intervals.

For JSON data sources, imports are run whenever a call is made to the Worklist Import Web API.

13.2 Examples

Inisoft Travel import interaction records into Syntelate XA based on customer activity on the Inisoft Travel website.

13.2.1 CSV File

Customers of Inisoft Travel can book a holiday through the Inisoft Travel website. If a customer begins the online checkout process but does not complete it, Inisoft Travel calls the customer the next day to find out if there is anything that they can do to help (and to try to make the sale).

To achieve this, each morning details of all “web drops” within the last 24 hours are exported from the Inisoft Travel website to a .csv file. Using the Worklist Manager Importer, Inisoft Travel schedule a daily import from this .csv file to the INTERACTION_X table.

This way, without any manual intervention by Inisoft Travel staff, Syntelate XA automatically passes outbound calls to agents for all web drops that occurred on the previous day.

13.2.2 JSON

On the Inisoft Travel website, customers looking for more information about a holiday package can arrange for an agent to give them a call at a time that suits them.

When the customer enters their details and clicks submit, the website immediately passes this information to the Worklist Import Web API, causing a new record to be imported into the INTERACTION_X table.

The Worklist Engine then picks up this record at the time that the customer selected and passes it as an outbound call to an agent.

13.3 Design/Published, Active/Dormant

For each import, you can have a **design** and/or a **published** version. This lets you edit the details of an import (in the design version) while the published version remains active. When you are happy with the design version, you can publish it. It then becomes the new published version.

Additionally, an import can be **active** or **dormant**. If you define a schedule for an import, it will only run at the defined times if it is both published *and* active.

13.4 Tasks

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

13.5 Adding an Import

To add an import, first follow these steps:

1. From the Worklist Manager Importer home page, click **IMPORT DATA** for the INTERACTION_X table to which you wish to import data. A list of all imports for that INTERACTION_X table is shown (if any exist).

2. Click .

The import is created immediately. Next, follow the steps below to set it up.

13.5.1 Step 1/6 - Select an Import Source

1. In the **Import Name** box, type a name for your import.
2. In the **Where to import from** dropdown, select the type of source from which you want to import records. Additional boxes appear depending on your selection.
3. For importing records from a database, select the database that you want to use in the **Database** dropdown.

   > **Note:** The **Database** dropdown is populated using the CONNECTIONLIST database table.

4. For importing records from a file, either:
   a. To import a file from a shared network, type the full path of the file in the **File from Shared Network** box.

      > **Note:** You must type the full UNC path of the file, including the file name and file name extension. You *cannot* import files from a C: drive.

   b. To import a file from your Azure environment (for cloud deployments), type the name of the Azure container in the **Azure container name** box and the file name in the **File from Shared Network** box.
5. For importing records via the Worklist Import Web API, type an example JSON string into the **Import from Json string** box. For more information about JSON

imports, see More about JSON Imports on page 242.

6. Click →.

13.5.2 Step 2/6 - Import Settings - Database

1. In the **SELECT * FROM** dropdown, select the database table or view from which you wish to import records. Syntelate Studio shows the fields of the selected table/view.

2. *(Optional)* To filter the records to be imported, type a SQL WHERE clause condition in the **WHERE** box.

> **Tip:** Double-click a field to add it to your WHERE clause.
>
> To see a 5-row extract of the results returned by your query, click **QUERY TABLE**.

3. Click →.

13.5.3 Step 2/6 - Import Settings - File

1. If the first row of your import file contains column names, click **Yes** for **Does the first row contain the column names?**

> **Tip:** To make use of Syntelate Studio's Auto Mapping functionality in step 3, you must include column names in your import file.

2. In the **Date & Time Format**, **Date Format**, and **Time Format** boxes, type the format used for date and/or time fields in your import file.

Notation

You can use the following notation in the date and/or time fields:

Format specifier	Description
d	The day of the month, from 1 through to 31.
dd	The day of the month, from 01 through to 31.
ddd	The abbreviated name of the day of the week, for example “Mon”.
dddd	The full name of the day of the week, for example “Monday”.
h	The hour, using the 12-hour clock from 1 to 12.
hh	The hour, using the 12-hour clock from 01 to 12.
H	The hour, using the 24-hour clock from 0 to 23.
HH	The hour, using the 24-hour clock from 00 to 23.
m	The minute, from 0 through to 59.
mm	The minute, from 00 through to 59.
M	The month, from 1 through to 12.

Format specifier	Description
MM	The month, from 01 through to 12.
MMM	The abbreviated name of the month, for example “Jan”.
MMMM	The full name of the month, for example “January”.
tt	The AM/PM designator.
yy	The year, from 00 to 99.
yyyy	The year, from 0000 to 9999.

3. For imports from a Microsoft Excel workbook only, select the worksheet from which you wish to import data in the **Excel Worksheet Name** box.

4. *(Optional)* For imports from a comma-separated values file or text file only, type the character that surrounds each value in the **Text Qualifier** box.

EXAMPLE

Let’s say that you want to import the following data from a text file:

```
"First name";"Surname"
"Jack";"Atkins"
"Emily";"Wightman"
```

Here the text qualifier is **"** and the delimiter is **;**. The first row *does* contain column names.

5. For imports from a text file only, type the character used to separate each value in the **Delimiter** box.

   > Tip: Type **\t** if the values are separated by tabs.

6. Check that the data in the **Extract from file** section looks correct.
7. Click →.

13.5.4 Step 2/6 - Import Settings - Json

1. In the **Date & Time Format**, **Date Format**, and **Time Format** boxes, type the format used for date and/or time fields in your JSON.

   > Tip: For the notation for these boxes, see **Step 2/6 - Import Settings - File** above.

2. Check that the data in the **Extract from Json** section looks correct.
3. Click →.

13.5.5 Step 3/6 - Worklist Field Mappings

Syntelate Studio shows the fields of the INTERACTION_X table to which you will be importing records. On this page, you define how these fields are populated for each new record that the Worklist Manager Importer imports.

There are three ways to populate a field:

- **From import field:** Populate the field using a field in your source database/file/JSON.
- **From user value:** Populate the field with a specific value. This value is used for all imported records.
- **From pre-defined date function:** Populate the field with the current date, current time, or current date and time.

Syntelate Studio's Auto Mapping functionality automatically maps fields that have the same name in the import source and the INTERACTION_X table (ignoring differences in case). To automatically map fields, click .

Warning: If you have already manually mapped any fields, Auto Mapping will clear these. A dialog box warns you of this when you click . Click **MAP** to proceed.

To manually specify how a field should be populated, follow these steps:

1. Click for the field that you want to manually map. A dialog box appears.
2. Either:
    a. Click **From import field** and select the field in the source database/file/JSON that you want to import from.
    b. Click **From user value** and type the value that you want to use for the field.

> **Note:** Syntelate Studio will not allow you to enter a value of the wrong data type. For example, you cannot enter a string value for an integer field in your INTERACTION_X table.

c. Click **From pre-defined date function** and select either **Current Date**, **Current Time**, or **Current Date and Time**.

3. Click **MAP**.

To clear a mapping for a specific field, click for that field. A dialog box appears. Click **Clear**.

To clear all mappings, click . A dialog box appears. Click **Clear**.

Once you've mapped all fields, click .

13.5.6 Step 4/6 - Import Settings

1. If in step 3 you did not map a field to LKTL_CBPRIORITY, then in the **Priority** dropdown, select the priority to assign to each imported record.

2. If in step 3 you did not map a field to LKTL_NUMTRIES, then in the **Number of attempts to contact client** box, type the number of times (from **1** to **99**) that an attempt should be made to contact the customer.

Note: LKTL_NUMTRIES decreases by 1 each time the agent uses a completion code that has the RETRYINTERVAL field populated. For more information, see document *Syntelate XA - Database Tables*.

3. If in step 3 you did not map a field to LKTL_RETRYAFTER, then in the **Start attempt Date** and **Time** boxes, enter the date and time after which the Worklist Engine will start attempting to pass the record to an agent.

4. *(Optional)* If in step 3 you did not map a field to LKTL_RETRYBEFORE, then in the **End attempt Date** and **Time** boxes, enter the date and time when the Worklist Engine will stop attempting to pass the record to an agent.

5. *(Optional)* If in step 3 you did not map a field to LKTL_LIFO, then in the **Last in first out Date** and **Time** boxes, enter the date and time to use for prioritizing records according to last-in-first-out rules.

6. If in step 3 you did not map a field to LKTL_TZOFFSET, then in the **Time Zone (Hours offset from UTC)** box, type a number of hours from UTC (Coordinated Universal Time), including **-** if behind UTC. This time zone offset is applied to each imported record.

7. If in step 3 you did not map a field to LKTL_CPGNO, then in the **Campaign Name** dropdown, select the universe to assign to each imported record.

8. *(Optional)* If in step 3 you did not map a field to LKTL_AGENTGROUPNO, then in the **Agent Group** dropdown, select the agent group to assign to each imported record.

9. Click →.

13.5.7 Step 5/6 - Schedule Import

To define when the import should be run, follow these steps:

1. In the **When should the import be performed** dropdown, select whether the import should be performed **On Demand** / **Once** / **Every X second(s)** / **Every X minute(s)** / **Every X hours(s)** / **Every X day(s)** / **Every X week(s)**.

   > **Note:** For a JSON import, select **On Demand**.

2. If you selected **Every X ...(s)** for **When should the import be performed**, then in the **How often should the import be repeated** box, type a number representing the X.

   > **EXAMPLE**
   >
   > Jack enters the following details:
   >
   > - **When should the import be performed**: Every X hours (s)
   > - **How often should the import be repeated**: 2
   >
   > Jack's import runs every 2 hours.

3. Unless you selected **On Demand** in the **When should the import be performed** dropdown, then in the **Date** and **Time** boxes under **Schedule Begins**, enter the date and time when the import should first be run.

4. *(Optional)* In the **Date** and **Time** boxes under **Schedule Ends**, enter the date and time after which the import should no longer be run.

Next, you can add one or more email addresses to which an automated email will be sent whenever your import is successfully run and/or whenever it fails. For more information about how to do this, see Managing Import Emails on page 240.

When you're done, click .

13.5.8 Step 6/6 - Import configuration complete

You have now configured your import.

To run it now, click . This functionality is not intended for JSON imports: instead make a call to the Worklist Import Web API.

To publish it and make it active, click .

To publish it and make it dormant, click . You can make it active later.

13.6 Deleting an Import

You can delete a design or a published version of an import, although a published version can only be deleted so long as it has not been run. If your import only has one version (either published or design), then deleting this deletes the import altogether.

To delete a version of an import, follow these steps:

1. From the Worklist Manager Importer home page, click **IMPORT DATA** for the INTERACTION_X table for which you have set up your import. A list of all imports for that INTERACTION_X table is shown.

2. From your import's **Published** or **Design** tab, click **DELETE**. The **Confirm Delete** dialog box appears.

3. Click **DELETE** / **DELETE BOTH**.

> **Tip:** The **DELETE BOTH** option is only available when you try to delete a published version of an import for which a design version also exists. This option deletes both versions.

13.7 Editing an Import

You can edit a published or a design version of an import.

> **Note:** If you try to edit a published version of an import for which a design version already exists, you will be asked whether:
>
> - You wish to edit the design version instead.
> - You wish to replace the design version with the published version.

To edit an import, follow these steps:

1. From the Worklist Manager Importer home page, click **IMPORT DATA** for the INTERACTION_X table for which you have set up your import. A list of all imports for that INTERACTION_X table is shown.

2. From your import's **Published** or **Design** tab, click **EDIT**.

> **Tip:** For instructions on how to configure an import, see Adding an Import on page 228.

13.8 Making an Import Active/Dormant

You can make an import active or dormant when publishing it from **Step 6/6 - Import configuration complete**. Just click  or .

Additionally, you can make a published import active or dormant anytime by following these steps:

1. From the Worklist Manager Importer home page, click **IMPORT DATA** for the INTERACTION_X table for which you have set up your import. A list of all imports for that INTERACTION_X table is shown.

2. Click **MAKE ACTIVE** / **MAKE DORMANT** for your import.

13.9 Managing Import Emails

On **Step 5/6 - Schedule Import**, you can configure Syntelate Studio to send an automated email report to one or more email addresses whenever your import is successfully run and/or whenever your import encounters an error.

> **Note:** For Syntelate Studio to send automated emails, you must set up an SMTP Configuration on page 141.
>
> For more information, see document *Syntelate XA - Managing Studio*.

13.9.1 Adding an Email Address

To add an email address, follow these steps:

1. In the **Send Email once import is complete** section, click . The **Add new email address** dialog box is shown.
2. In the **Email Address** box, type the email address to which the automated email should be sent.
3. Use the check boxes to select whether the email should be sent when the import is successfully run and/or when the import fails.
4. Click **SAVE**.

13.9.2 Editing an Email Address

To edit an email address, follow these steps:

1. In the **Send Email once import is complete** section, click for the email address that you want to edit. The **Edit Email Address** dialog box is shown.
2. Edit the **Email Address** box and/or the check boxes as required.
3. Click **SAVE**.

13.9.3 Deleting an Email Address

To delete an email address, follow these steps:

1. In the **Send Email once import is complete** section, click for the email address that you want to delete. The **Confirm Delete** dialog box appears.
2. Click **DELETE**.

13.10 Manually Running an Import

> **Note:** This step does not apply to JSON imports.

You can manually run an import from **Step 6/6 - Import configuration complete**. Just click .

Additionally, you can run a published import anytime by following these steps:

1. From the Worklist Manager Importer home page, click **IMPORT DATA** for the INTERACTION_X table for which you have set up your import. A list of all imports for that INTERACTION_X table is shown.
2. Click **RUN** for your import. The **Import Details** page is shown.
3. Click .

13.11 More about JSON Imports

The Worklist Import Web API accepts a JSON string representing the data to be imported. This must be in the following format:

```
{ "objectName": [ JSON array of data ] }
```

13.11.1 The Example JSON String

To configure an import, you must have an example JSON string representing the data that you wish to import.

For example, let's say you want to import data in the following structure into the INTERACTION_X table:

Forename	Surname	Date of Birth	Phone Number	Email
Bob	Smith	30 Oct 1977	01214960538	bobs@example.com
Andrea	Jones	13 Jan 1985	02896496323	andreaj@example.com

The JSON string would look like this:


```
{
 "data": [
  { "Forename": "Bob", "Surname": "Smith", "Date Of Birth": "1977-10-30", "Phone Number": "01214960538", "Email": "bobs@example.com" },
  { "Forename": "Andrea",  "Surname": "Jones", "Date Of Birth": "1985-01-13", "Phone Number": "02896496323", "Email": "andreaj@example.com" }
 ]
}
```


You would paste this JSON into the **Import from Json string** box in step 1 of Adding an Import on page 228.

Syntelate Studio's Auto Mapping functionality automatically maps keys in your JSON to fields in the INTERACTION_X table, where their names match. As such, we could edit the above JSON to replace "Phone number" with, say, either "LKTL_PHONENUMBER" or "LKTL_NEXTDIALNUMBER".


```
{
 "data": [
  { "Forename":"Bob", "Surname":"Smith", "Date Of Birth":"1977-10-30", "LKTL_
PHONENUMBER":"01214960538", "Email":"bobs@example.com" },
  { "Forename":"Andrea", "Surname":"Jones", "Date Of Birth":"1985-01-13", "LKTL_
PHONENUMBER":"02896496323", "Email":"andreaj@example.com" }
 ]
}
```


13.11.2 Calling the Worklist Import Web API

To import data, make a POST request to *https://serverurl/api/worklist*.

The POST must provide the following JSON object in the body of the request.

Name	Description
ImportNumber	The number of the import that has been configured to import this data. This number is shown in Syntelate Studio in the list of imports for a particular INTERACTION_X table. To see it, click **Show details** for the import.
ApiKey	Your authentication key, provided to you by Inisoft.
ImportData	A JSON string containing the data to import.

For the example given earlier, the JSON object would look as so:


```
{ 'ImportNumber' : '1',
  'ApiKey' : 'xxx',
  'ImportData': '{ "data": [
   { "Forename":"Bob", "Surname":"Smith", "Date Of Birth":"1977-10-30", "LKTL_
PHONENUMBER":"01214960538", "Email":"bobs@example.com" },
   { "Forename":"Andrea", "Surname":"Jones", "Date Of Birth":"1985-01-13", "LKTL_
PHONENUMBER":"02896496323", "Email":"andreaj@example.com" }
  ] }'
}
```


Since a large number of records can be inserted in a single call to the Worklist Import Web API, data is added to an import queue.

The call will return the following JSON object result.

Name	Description
Success	True/False
ErrorMsg	A string containing the error message.
QueueId	ID of the queue object.
RecordCount	The number of records to be imported.

13.11.3 Checking the Import Status

You can check the status of an import by making a GET request to *https://serverurl/api/worklist/x*, where x is the QueueId that was returned by the POST request.

The call will return the following JSON object result.

Name	Description
Status	PENDING/ERROR/SUCCESS
ErrorMsg	A string containing the error message.
RecordCount	The number of records in this import.
ImportCount	The number of records imported so far.

Note: When configuring the import in Syntelate Studio, you can also set up emails to be sent whenever an import is successful and/or whenever it fails. For more information, see Managing Import Emails on page 240.