Software by Inisoft



Technical

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1. Technical

1.1 Overview

This section provides technical information about Syntelate XA and provides user documentation for Syntelate Studio and Syntelate Designer.

1.2 Concepts

1.2.1 Desktops

Syntelate XA provides three types of desktop that serve the needs of agents and their supervisors:

- **Syntelate XA Agent Desktop**: The agent desktop is where an agent works from to handle customer interactions and process records.
- **Syntelate XA Configuration Desktop**: The configuration desktop is where supervisors work to configure and monitor day-to-day operations and organize their agent teams.
- **Syntelate XA Dashboard Desktop**: The dashboard desktop is where supervisors can view real-time or historical contact center activity, and generate reports on historical data.

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> **Note:** No matter what your role is in the contact center, you should make yourself familiar with the agent desktop interface and with those concepts that are relevant to agents, such as **workzones**. Make sure you read Syntelate XA - Agent.

1.2.2 Designer and Studio

Many of the features of Syntelate XA are configured using two products called Syntelate Designer and Syntelate Studio. They are part of Syntelate XA.

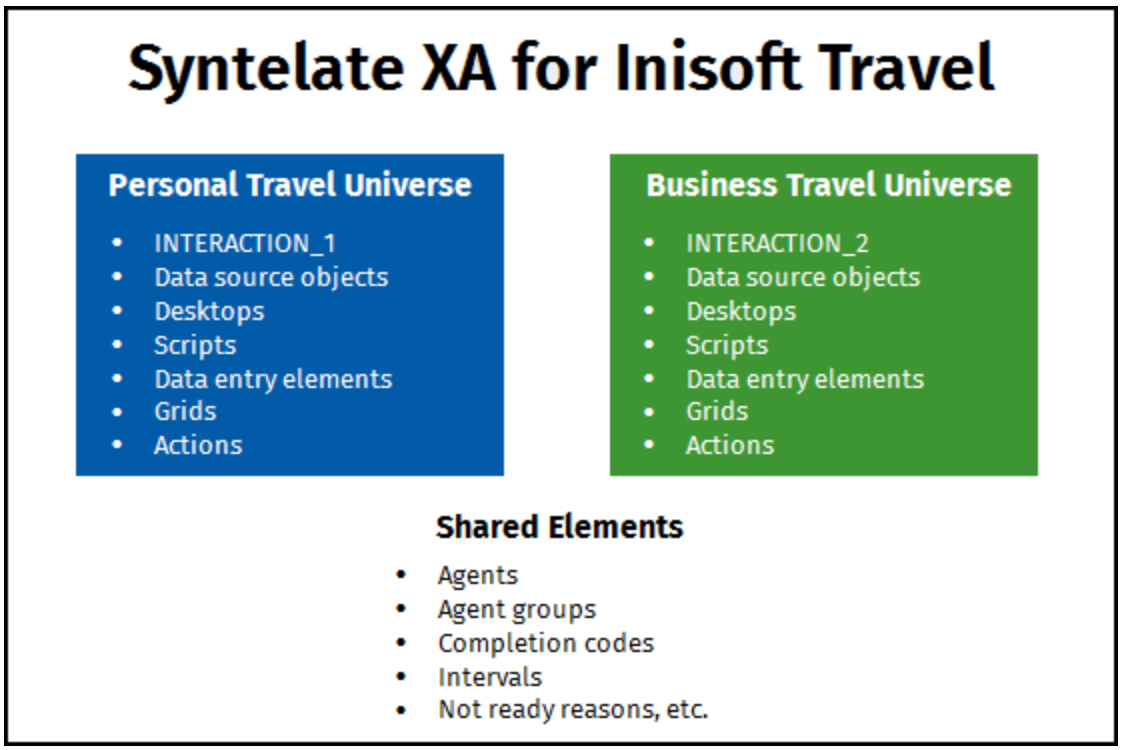
Syntelate Designer ("Designer") is a visual builder you use to create the scripts, data entry forms, and desktops of Syntelate XA. The desktops and the elements that constitute them – scripts, data entry forms, email editors, etc. – are customizable, so you can tailor each desktop to your needs. You'll find detailed information in the document *Syntelate XA - Designer*.

Syntelate Studio ("Studio") is an administrative application for configuring the functionality of Syntelate XA. It's where you set up features such as multitenancy user roles, email snippets, the non-voice communication channels in Syntelate XA, and more. When you're ready to dig deeper, read the document *Syntelate XA - Studio*.

1.2.3 Universes

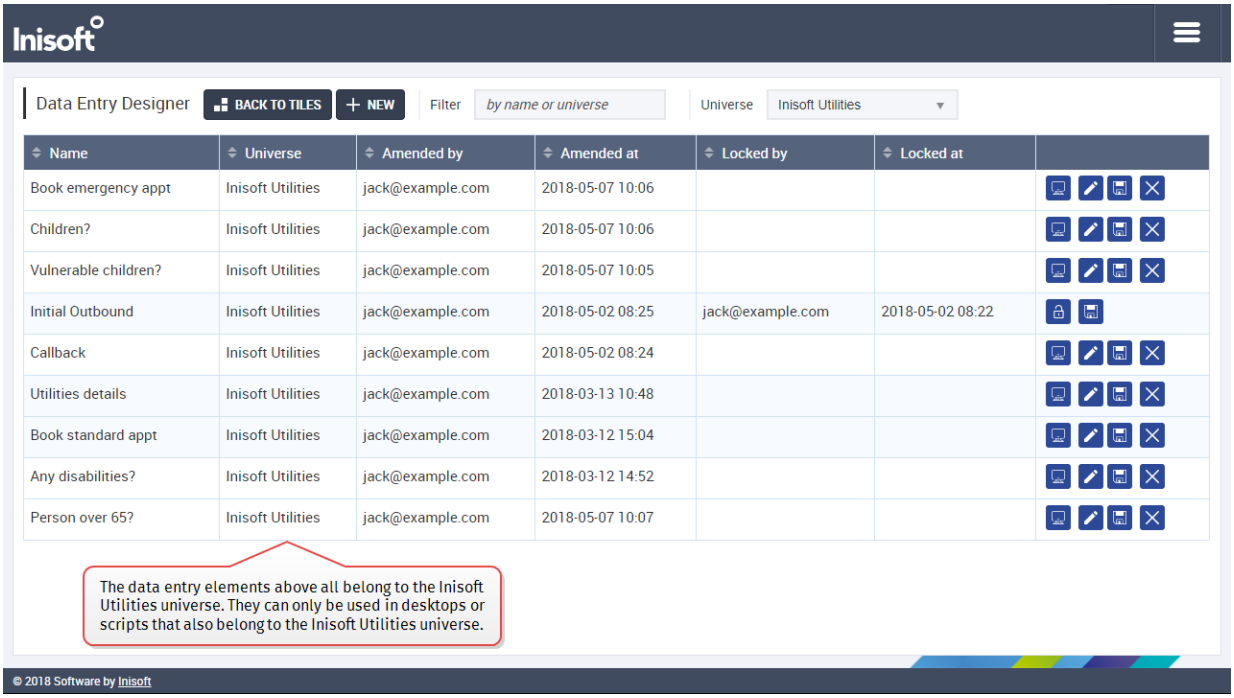
An installation of Syntelate XA can support multiple **universes**. The concept of universes makes it possible to separate data within a single installation of Syntelate XA.

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Elements in the Designer are all specific to a particular universe. For example, with reference to the above diagram, you could *not* add scripts or data entry elements in the Personal Travel universe to a desktop in the Business Travel universe.

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Whenever you create a new Syntelate Designer element, such as a desktop, script, or workzone, you must specify the universe to which it should be added.

1.2.4 INTERACTION_X Table

Each universe has a unique **INTERACTION_X table**: INTERACTION_1, INTERACTION_2, and so on.

The INTERACTION_X table contains one record for every interaction between an agent and a customer, whether in the past or in the future, and regardless of channel. As such, for every voice call that has been made or is to be made, for every customer email, and for every chat there is one record in a universe's INTERACTION_X table.

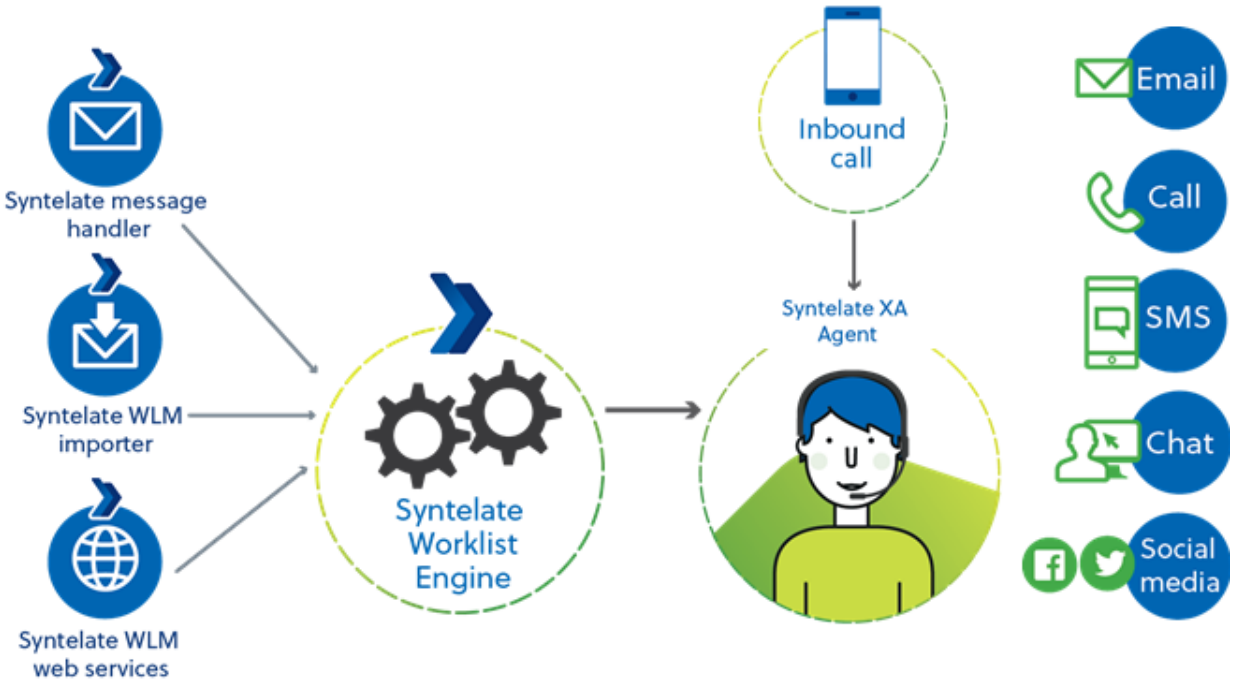
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Note: Let's say you want an agent to make an outbound call to a particular customer. This would be represented by an interaction record in the universe's INTERACTION_X table.

Now let's say that it takes three attempts over the course of a couple of days for an agent to get through to the customer. These three attempts would all share a single interaction record. There would *not* be a unique interaction record for each attempt.

1.2.5 Worklist Engine

With the exception of inbound calls, the **Worklist Engine** is responsible for passing all types of interactions to agents: outbound calls, emails, and chats (including web, SMS, and social media chats).



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The Worklist Engine essentially monitors the INTERACTION_X table of a universe for any records that need to be passed to an agent. It then passes each record to the right agent at the right time. It does this based on how certain fields of the INTERACTION_X table have been populated.

The Worklist Engine sorts suitable records based on date, agent and priority. You can also specify additional fields for the Worklist Engine to sort records by, if you wish.

To import records of outbound calls to make, use the Worklist Manager (WLM) Importer. These records will then be picked up by the Worklist Engine. For more information, see document *Syntelate XA - Worklist Manager Importer*.

1.2.6 Message Gateways

For each non-voice channel that you want to use in Syntelate XA, you must configure one (or more) message gateways.

A **message gateway** is a connection between Syntelate XA and, say, an Exchange email server, or Facebook, or an SMS service. A message gateway allows messages sent via these channels to be added to the INTERACTION_X table, which in turn allows them to be picked up by the Worklist Engine.

For information about configuring message gateways, see document *Syntelate XA - Message Gateway Configuration*.

1.2.7 Fulfilments

Syntelate XA's **Fulfilment Server** is a powerful feature that lets you schedule SQL statements to be run at particular intervals.

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You can, for example, use the Fulfilment Server in conjunction with a message gateway to send an SMS message to customers following a voice call, asking them about their experience.

For information about configuring fulfilments, see document *Syntelate XA - Fulfilment Server*.

> **Note:** Fulfilments are an advanced feature of Syntelate XA that should only be set up by someone who is familiar with SQL and who knows what they're doing.
>
> If you want help with creating fulfilments, contact Inisoft Support at support@inisoft.com.

1.2.8 Multitenancy

You can choose to implement Syntelate XA in a multitenant architecture. Multitenancy allows one instance of Syntelate XA to be used by multiple tenants. Although the tenants share the same instance, they do not have access to the data of other tenants.

> **Note:** If you would like information on pricing, contact us at sales@inisoft.com and tell us about your requirements.

1.2.9 Customer Relationship Management Systems

You can either use Syntelate XA as your customer relationship management (CRM) system or integrate an external CRM system with Syntelate XA.

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1.2.9.1 Salesforce

As of version 2.11, Syntelate XA provides a native integration with Salesforce that you can create and manage using Designer and your Syntelate XA Web API App Settings. See the Salesforce on page 538 section for instructions.

1.2.9.2 Other CRM Systems

Alternatively, Syntelate XA can integrate with other CRM systems. If you want to use a different CRM system, contact us at sales@inisoft.com to discuss your requirements.

1.3 What Next?

This topic has introduced you to the key concepts underpinning Syntelate XA. Next, explore the rest of the document *Syntelate XA - Technical* to learn more about the configuration of Syntelate XA.

Or, browse the documents *Syntelate XA - Agent* and *Syntelate XA - Supervisor* to learn more about how to use Syntelate XA in a contact center.

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2. Authentication

Syntelate XA can be configured to use one of the following authentication options:

- A username and password using ASP.NET Identity
- Windows username using IIS Windows Authentication
- Windows username using SAML for authentication

Contact us at support@inisoft.com if you would like more information.

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3. Channels

3.1 Overview

This section describes the channels that Syntelate XA offers:

- Telephony
- Email
- Facebook Messenger chat
- SMS
- SMS chat
- Web chat
- WhatsApp chat

All channels except web chat are provided by integration with third-party services.

Unlike the other channels, Syntelate XA's prebuilt web chat app does not depend on integrations. However, you can add integrations to your web chat channel to take advantage of extra features. To learn more about web chat features, see the Web Chat on page 164 section.

3.2 Integrations

Explore this section to find out which integrations are offered for each channel.

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3.3 Azure OpenAI API Connectors

Syntelate XA's integration with the Azure OpenAI API provides the following connectors to the Syntelate XA Agent Desktop and Syntelate XA Dashboard Desktop.

- **Rewriter**: A writing assistant for Web Chat on page 164, Facebook on page 151, SMS Chat on page 158, WhatsApp on page 176, and Email on page 137. See how agents use it: Using Rewriter.
- **Sentiment Analysis**: For Web Chat on page 164, Facebook on page 151, and Email on page 137, sentiment analysis rates customer and agent messages as positive, neutral or negative and shows the result to the agent. See the agent experience: Chat Sentiment Analysis and Email Sentiment Analysis.
- **Report Summarizer**: For the Syntelate XA Dashboard Desktop, Report Summarizer provides an executive summary of a report's data. See Dashboard Desktop for details.

The Azure OpenAI API operates a token system for using its API. The Syntelate XA connectors control the usage of tokens by restricting the number available each month. The balance resets each month and unused tokens are not carried over.

> **Note:** If you would like information on pricing, contact us at sales@inisoft.com and tell us about your requirements.

3.4 Request an Integration

If you need to discuss an integration that's not covered in this document, contact our sales team at sales@inisoft.com, or use the Contact Us form on the Inisoft website.

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3.5 Avaya Aura CM

Syntelate XA supports several CTI (computer telephony integration) solutions for voice calls. One of these solutions is integration with Avaya Aura® Communication Manager via Avaya Aura® AE Services TSAPI.

Our integration with TSAPI has been compliance tested by Avaya.

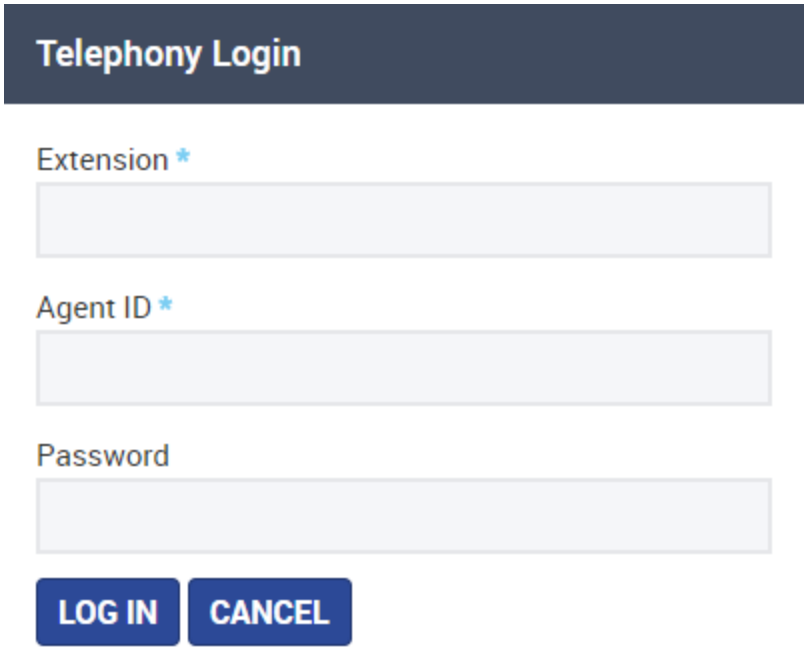
3.5.1 How It Works

At a very high level, here's how Syntelate XA's integration with TSAPI works.

3.5.1.1 Telephony Login

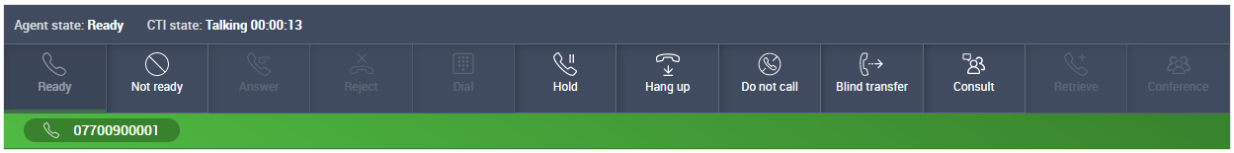
Where a Syntelate XA workzone has been configured to use TSAPI, the agent will see the **Telephony Login** dialog box upon selecting that workzone.

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3.5.1.2 Telephony Toolbar

Once logged in to the TSAPI-enabled workzone, a telephony toolbar is pinned to the top of the agent's desktop. It is via this that the agent performs most telephony operations.



The current CTI state (shown at the top of the toolbar) defines the buttons that are shown and whether they are clickable or grayed out.

The following table lists the CTI states in which each button is visible and clickable.

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Button	CTI State(s) in Which Visible and Clickable
Answer	Ringing
Dial	Preview, Wrap Up, Worklist
Cancel preview	Preview
Hold	Talking, Consult Dialing, Consult, Consult Receiver, Conference, Conference Receiver
Unhold	Hold
Hang up	Dialing, Talking, Consult Receiver, Conference, Conference Receiver
Blind transfer	Talking
Consult	Talking
Retrieve	Consult Dialing, Consult, Conference
Transfer	Consult Dialing, Consult, Conference
Conference	Consult

The agent can both hang up and close an interaction record by clicking a completion buttoncompletion button. A completion button is clickable in the following CTI states: Preview, Talking, Wrap Up, Conference.

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> **Note:** Any buttons in the telephony toolbar that you do not wish to use can be hidden. This is done via the **appsettings.config** file for Syntelate XA.

3.5.1.3 Telephony Logout

When the agent logs out of a TSAPI-enabled workzone (by clicking  and then **Log out**), Syntelate XA logs them out of TSAPI.

The agent can only log out when their agent state is **Not ready**.

3.5.2 Supported Functionality

The following functionality is supported:

- Go ready / not ready
- Answer (inbound calls)
- Dial (outbound calls)
- Cancel preview
- Hold/unhold
- Hang up (by agent/customer)
- Blind transfer
- Consult
- Conference

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3.5.2.1 Going Ready

When an agent clicks **Ready** in the CTI toolbar, their phone is also set to ready, if they are set up to receive inbound calls.

For each workzone, you can define whether:

- The workzone is outbound only.
- The workzone accepts inbound calls but only for agents in a particular agent group.
- The workzone accepts inbound calls for all agents.

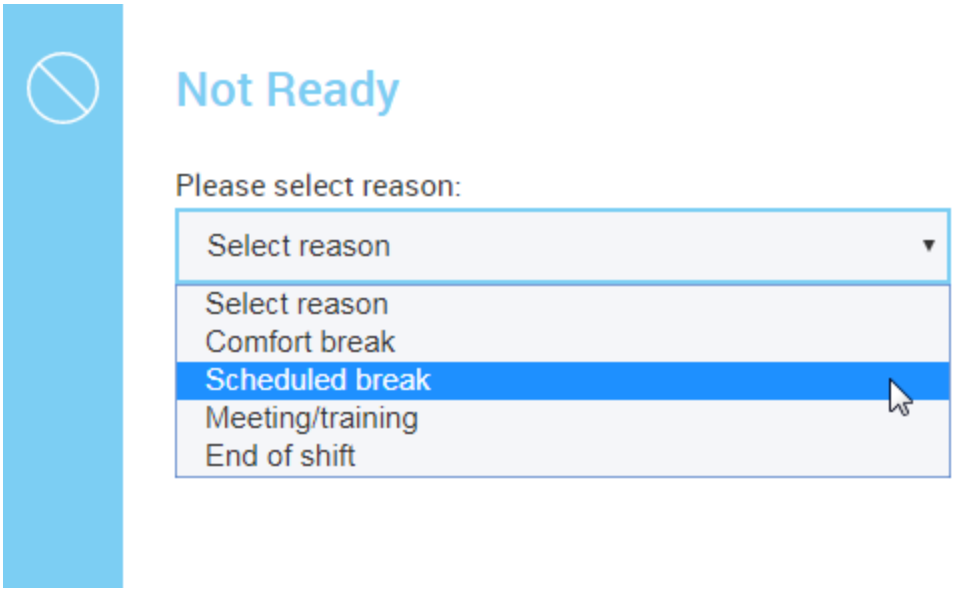
If an agent is not set up to receive inbound calls, their phone is never set to ready. Clicking **Ready** in Syntelate XA does, however, allow them to be passed other types of interaction, such as outbound calls to make, emails, or chats.

> **Note:** At the end of each call, Syntelate XA checks whether the agent is set up to receive inbound calls. Syntelate XA also performs this check every 30 seconds while the agent is waiting for a call.
>
> This lets you move an agent into or out of the inbound agent group to meet demand.

3.5.2.2 Going Not Ready

When the agent clicks **Not ready**, Syntelate XA prompts the agent to select a not ready reason.

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You must define the not ready reasons that you want to use and also associate each with an Aux reason code. Syntelate XA passes this Aux reason code to TSAPI when the agent's state is set to **Not Ready**.

If the agent goes not ready while on a call, their agent state is set to **Pending Not Ready**. This changes to **Not Ready** upon completion of the call.

> **Note:** If you have not set any not ready reasons, the agent will be set **Not Ready** or **Pending Not Ready** immediately upon clicking **Not ready** (without having to first select a reason).

3.5.2.3 Answer

When an agent clicks **Answer** to accept an inbound call, the following fields are populated in the interaction record:

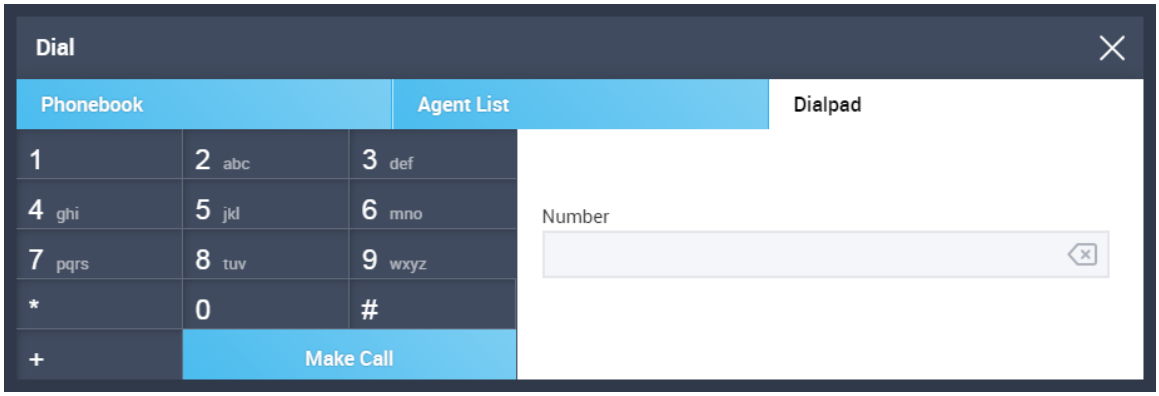
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- **LKTL_CLI:** Calling line identification
- **LKTL_DDI:** Direct dial-in
- **LKTL_UCID:** Universal call identifier
- **LKTL_UUI:** User-to-user information

For existing customers, this lets Syntelate XA match on the customer's phone number and then display the customer's details to the agent.

3.5.2.4 Dial

If the agent clicks **Dial**, the **Dial** window shows.



The agent can use this window to make outbound calls.

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Note: If the agent is viewing a record that contains a phone number, the agent can also click the  or  button beside the phone number to dial it.

 immediately dials the customer, whereas  sends the customer's number to the **Dial** window.

3.5.2.5 Cancel Preview

Syntelate XA can pass outbound calls to the agent in preview. This lets the agent preview the customer's details before making the call.

If the agent decides not to make the call, they can click **Cancel preview**. This completes the call using the completion code that has been defined for the workzone. The agent then moves onto the next item in their workload.

If the agent is set up to receive inbound calls, an outbound record in preview can be interrupted by an inbound call.

3.5.2.6 Hang Up

If the agent is disconnected from the customer during a call – for example, due to the customer hanging up – a message informs the agent of this.

The agent can hang up by clicking **Hang up** in the CTI toolbar. Alternatively, the agent can both hang up and close the interaction record by clicking a completion button.

3.5.2.7 Blind Transfer

There are two ways in which the agent can transfer the customer to another number:

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- Blind transfer
- Warm transfer (in other words, transferring from a consult)

With blind transfer, the agent is immediately disconnected from the customer upon initiating the transfer. As such, the party to whom the call is transferred comes at it “blind” (with no introduction from the initial agent about what the customer is calling about).

3.5.2.8 Consult and Conference

Consult lets the agent speak to another party while the customer is on hold. To use consult, the agent’s phone must have exactly two line appearances. Syntelate XA does not support more than two line appearances for an agent phone.

While on a consult, the agent can do the following:

- **Transfer:** Transfers the call to the other party and ends the call for the agent (“warm transfer”).
- **Retrieve:** Drops the other party from the call and takes the customer off hold.
- **Conference:** Takes the customer off hold and lets them participate in a three-way call with the agent and the other party.

Syntelate XA supports both **agent consult** and **external consult**.

With agent consult, the other party is another agent in Syntelate XA who is logged into a workzone that uses the same universe (“agent B”). While on a consult, agent B can see the customer’s details in their desktop but cannot edit them. Agent B’s telephony toolbar shows appropriate buttons based on their role as consult receiver.

If agent A transfers the call, agent B’s desktop becomes editable and their telephony toolbar updates as appropriate.

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With external consult, the other party is either:

- Anyone other than an agent logged in to Syntelate XA
- An agent logged in to Syntelate XA but on a workzone that uses a different universe.

Note: With agent consult, transfer immediately closes the record for agent A and puts agent A into a ready or not ready state as appropriate.

With external consult, transfer puts agent A into wrap-up.

EXAMPLE

Emily, a customer of Inisoft Travel, has a query about her hotel. She calls Inisoft Travel but mistakenly dials the Business Travel number instead of the Personal Travel number. She gets through to Zac.

Zac quickly realizes that Emily has got through to the wrong person, and so he clicks **Consult** and then selects the Personal Travel hunt group (**agent consult**). This puts Emily on hold. Zac's call is passed to Jack, and Zac briefly explains to Jack what Emily is calling about. He then **transfers** the call to Jack (**warm transfer**).

Jack speaks with Emily to find out more about her problem. Realizing that he needs to speak with the hotel to sort the matter, he clicks **Consult** and then dials the hotel's number (**external consult**). This again puts Emily on hold. Jack speaks with the hotel and gets to the bottom of the matter.

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Jack now clicks **Retrieve**, which ends the call with the hotel and takes Emily off hold. Jack is now able to tell Emily the answer to her query.

3.5.3 What You Need

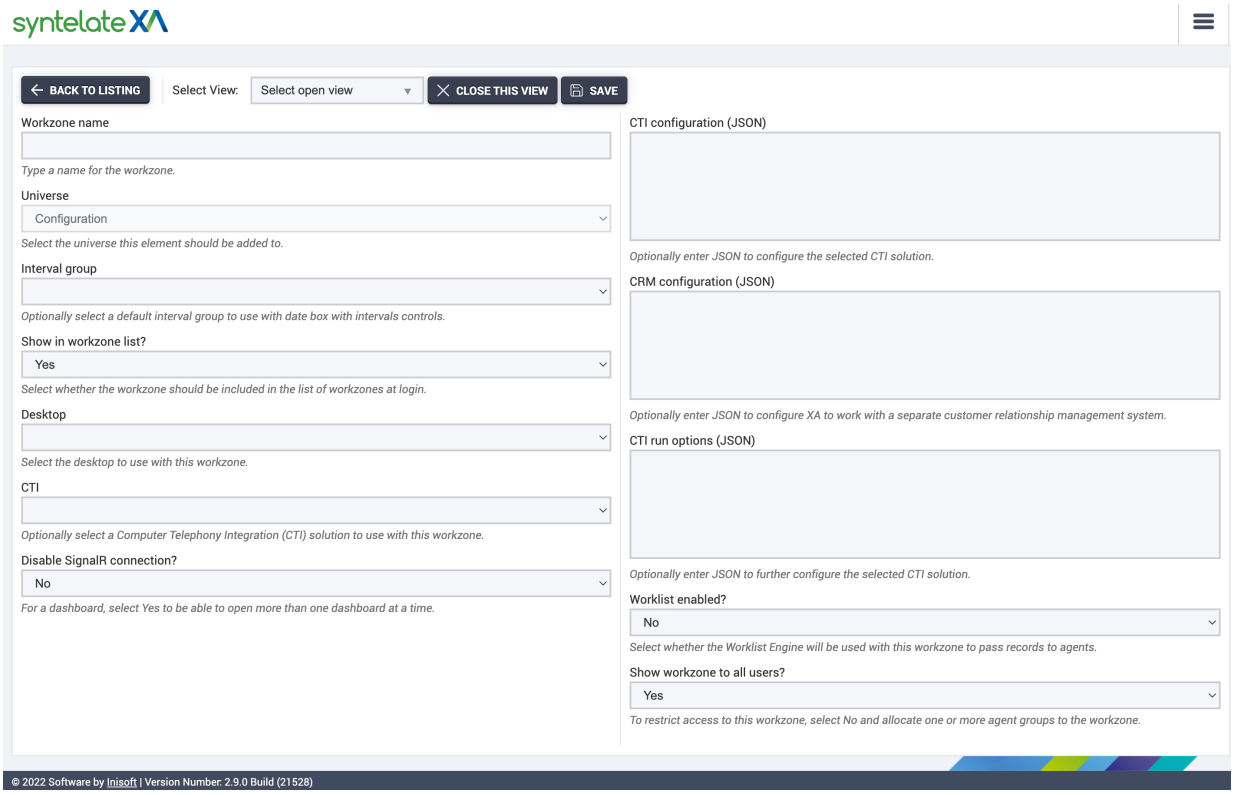
For Syntelate XA to integrate with Avaya TSAPI, you must have:

- Avaya Aura® Communication Manager
- Avaya Aura® Application Enablement Services
- The TSAPI Client installed on the Syntelate XA server

3.5.4 Workzone Configuration

In Syntelate XA, all CTI integrations are configured in Designer's Workzone Editor. Here is a screenshot of the configuration screen in Workzone Editor.

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The following three settings in a CTI workzone must be completed to create a telephony channel in Syntelate XA:

- **CTI**: Offers types of telephony to choose from.
- **CTI configuration (JSON)**: This is where you specify the telephony server connections.
- **CTI run options (JSON)**: This is where you specify the telephony behavior at runtime, in other words, how Syntelate XA should handle calls on the Syntelate XA Agent Desktop.

The CTI configuration and run options need to be provided in JSON format.

Below, you'll see examples and descriptions of each option.

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3.5.4.1 CTI configuration (JSON)

```
{
    /* Standard settings */
    "CtiSource": "TSAPI",
    "CtiApiUrl": " ",
    "AutoLogin": false,
    "RecordLoginDetails": true,
    "PopOnOutgoing": true,

    /* TSAPI server settings */
    "ServerName": " ",
    "Username": " ",
    "Userpassword": " ",
    "TimeoutSeconds": " ",
```

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```
    "PrivateDataVersions": " ",

    "LoginShortCode": "# ",

    "cancelPreviewCode": "~PrvCncl~",


    /* Mobile XA (telecommuter mode) settings */

    "DMCC": {

            "AESAddress": "xxx.xxx.x.x",

            "AESPort": "xxxx",

            "CMAddress": "xxx.xxx.x.x",

            "CertificateName": "",

            "UseSSL": false,

            "Protocol": "x.x.x",

            "Extensions": [

                {
```

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```
                    "ExtnNo": "xxxxx-xxxxx",
                    "ExtnPwd": "xxxxxxx"
                }
            ],
            "PstnPrefix": "x"
        }
}
```

Standard Settings

The standard settings are required.

JSON Key	Description
CtiSource	Default value: An empty string. Valid values: A string that is either "POM", "TSAPI" or "IPOffice". Defines the type of telephony integration.
CtiApiUrl	Default value: An empty string. Valid values: A string that contains an absolute URL.

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JSON Key	Description
	Defines the URL of the Syntelate XA Web API for the CTI, hosted on your Syntelate XA instance. We recommend you host Syntelate XA near the phone system (on the same domain or in the same data center) to avoid latency issues.
AutoLogin	Default value: true Valid values: true | false Determines whether Syntelate XA will automatically log in the agent. If AutoLogin fails for any reason, Syntelate XA shows the log in dialog to the agent so they can log in manually. We recommend setting this to true.
RecordLoginDetails	Default value: true Valid values: true | false Determines whether the agent's login details will be stored in the AGENTLASTLOGIN table after they first successfully log in. We recommend setting this to true.
PopOnOutgoing	Default value: true Valid values: true | false Determines whether the Dial telephony button will pop a new interaction record to the agent desktop if it doesn't already have a interaction record open. Only affects agents who dial an outbound call while in Not Ready or Waiting.

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TSAPI Settings

JSON Key	Description
ServerName	Default value: An empty string. Valid values: A string. Defines the TServer name for the Avaya Communication Manager (CM).
Username	Default value: An empty string. Valid values: A string. Defines the CT user name for Avaya Aura® AE Services.
Userpassword	Default value: An empty string. Valid values: A string. Defines the CT user's password.
TimeoutSeconds	Default value: 0 Valid values: A positive integer. Defines the number of seconds that Syntelate XA should wait for a response from a command.
PrivateDataVersions	Default value: An empty string Valid values: A string that is a series of positive numbers delimited by full points, for example, "4.2.0".

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JSON Key	Description
	Defines the TSAPI version.
LoginShortCode	Default value: An empty string. Valid values: A string that is a positive number prefixed by a hash symbol. This is not required but can be used if the softphone cannot log in to TSAPI using the TSAPI setAgentState command. In which case, you can specify a LoginShortCode to enable agents to log in. The code is in the format of a hash key and integer, for example, "#11".
cancelPreviewCode	Default value: An empty string. Valid values: A string that is a completion code present in the COMPLETION_CODES table. Defines the completion code to use when the agent clicks Cancel preview. References the CODE field of the COMPLETION_ CODEStable.

DMCC Settings

AE Services Device, Media, and Call Control (DMCC) is used by Syntelate XA Mobile (the telecommuter mode of Syntelate XA). You should only include the following settings if you are using Syntelate XA Mobile.

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JSON Key	Description
AESAddress	Default value: An empty string. Valid values: A string that is an IP address. Defines the IP address of your Avaya Aura Application Enablement Services (AE Services) server.
AESPort	Default value: An empty string. Valid values: A string that is a positive number. Defines the port number of the AES IP address.
CMAddress	Default value: An empty string. Valid values: A string that is an IP address. Defines the IP address of your AES Communication Manager.
CertificateName	Default value: An empty string. Valid values: A string. Defines the name of the SSL certificate.
UseSSL	Default value: false Valid values: true | false Dependent on CertificateName. If CertificateName is provided, UseSSL determines whether the SSL certificate is enabled.
Protocol	Default value: An empty string.

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JSON Key	Description
	Valid values: A string that is a series of positive numbers delimited by full points, for example, "2.4.5". Defines the DMCC version number.
Extensions [{ "ExtnNo": " ", "ExtnPwd": " " }]	ExtnNo: Defines the extension number or range of extensions that represent the Syntelate XA Mobile agents' phone numbers. Default value: An empty string. Valid values: A string that is a positive number or a range of positive numbers, for example, "5" or "0000-1111". ExtnPwd: Defines the password for the extensions. Default value: An empty string. Valid values: A string.
PstnPrefix	Default value: An empty string. Valid values: A string that is a positive number, for example, "9". Defines the prefix Syntelate XA Mobile should use when dialing external numbers.

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3.5.4.2 CTI run options (JSON)

```
{
    /* Go ready options */
    "GoReadyOptions": {
        "IncomingCallsAgentGroup": 0,
        "OutboundOnly": false,
        "OutboundOnlyAuxCode": 0,
        "GoReadyWithManualIn": false
    },
    /* Call options */
    "CallOptions": {
        "ExtnLength": 5,
        "ExtnLengthComparison": ">",
        "ExternalPrefix": "0",
```

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```
        "SupportDeviceIdPartialMatch": true,
        "HangupClearCall":false,
        "NailupAni":"00000"
    },
    /* Wrap timer options */
    "WrapTimer": {
        "Countdown": true,
        "CountdownTimeoutSecs": 30,
        "CountdownAddTimeCount": 1,
        "CountdownAddTimeSecs": 10,
        "autoCompleteCode": "AUTOWRAP"
    },
    /* Inbound options */
    "InboundOptions": {
```

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```
        "PopInboundInNotReady": true,
    },
    /* Blind transfer options */
    "BlindTransfer": {
        "OriginCompare": "9999",
        "TransferTimeout": "00:10:00",
        "ShowSameInteractionRecord": true,
        "FieldsToCopy": [
            "FORENAME",
            "SURNAME",
            "LKTL_AGENTNOTES"
        ]
    }
    /* Consult options */
```

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```
    "ConsultAsExternalOnly": false,

}
```

Go Ready Options

The GoReadyOptions settings determine whether the agent state will remain Not Ready in TSAPI even if the agent is Ready in Syntelate XA.

> **Note:** You can override these settings by providing skill membership settings on the phone system.

JSON	Description
IncomingCallsAgentGroup	Default value: 0 Valid values: A positive integer. Defines the agent group number that will be set Ready for inbound calls. References the AgentGroupNo field of the AGENTGROUPS table. If you omit this setting, then all agents will be available for inbound calls (unless you also set OutboundOnly to true).
OutboundOnly	Default value: false Valid values: true | false Determines whether the workzone is outbound only. Set to

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JSON	Description
	false if it will handle both inbound and outbound calls.
OutboundOnlyAuxCode	Default value: 0 Valid values: A positive integer. Defines the Aux reason code that tells the CTI system that the agent is busy handling calls and it should not pass the agent inbound calls.
GoReadyWithManualIn	Default value: false Valid values: true | false Determines whether the agent needs to manually click Answer to pick up an inbound call. Set to false if inbound calls should be answered automatically. Exception: the settings of the agent's phone (their extension number) can override this.

Call Options

The CallOptions group lets you configure the agent phone.

JSON	Description
ExtnLength	Default value: 0 Valid values: A positive integer.

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JSON	Description
	Defines the number of digits in internal agent phone extensions. If you have varying lengths of internal extension (for example, a mix of 4 digit and 5 digit extensions) then set this to the higher number (and set ExtnLengthComparison accordingly).
ExtnLengthComparison	Default value: Empty string. Valid values: An operator (such as !=, >, or >=). Determines when ExternalPrefix is assigned to a phone number, based on ExtnLength. For example, if ExtnLength is 5 and ExtnLengthComparison is !=, then ExternalPrefix is assigned to any phone number with a length other than 5 (numbers with 4, 7 or 11 digits, and so on).
ExternalPrefix	Default value: Empty string. Valid values: A positive number. Defines the prefix Syntelate XA should use when dialing external numbers.
SupportDeviceIdPartialMatch	Default value: true Valid values: true | false
HangupClearCall	Default value: true Valid values: true | false

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JSON	Description
	Determines whether the Hang up button completes the interaction record in Syntelate XA and also disconnects the call in Avaya Aura CM.
NailupAni	Default value: Empty string. Valid values: The POM ANI (CLI) number. Defines the POM Automatic Number Authentication (ANI), also known as the caller line-in (CLI) number. Applies exclusively to POM Blend environments where TSAPI handles inbound calls. NailupAni establishes a persistent, nailed-up call via TSAPI and prevents nail-up calls from popping a record in Syntelate XA. You can find the POM ANI (CLI) number in your Avaya Experience Portal, under POM Global Settings.

Wrap Timer Options

JSON	Description
Countdown	Default value: true Valid values: true | false Determines whether automatic wrap-up of calls is enabled. If true, calls are wrapped up when the countdown is complete. When true, Countdown is dependent on the other wrap timer options in this group.

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JSON	Description
CountdownTimeoutSecs	Default value: 0 Valid values: A positive integer. Defines the number of seconds that the wrap timer counts down from.
CountdownAddTimeCount	Default value: 0 Valid values: 0 | 1 (as integers, not strings) Determines whether the **+ ADD TIME** button is displayed on the Agent Desktop. 0 is false and 1 is true. If you set this to 1, then you need to include the option CountdownAddTimeSecs. See below.
CountdownAddTimeSecs	Default value: 0 Valid values: A positive integer that represents a time in seconds. Dependent on CountdownAddTimeCount. If you have set CountdownAddTimeCount to 1, then you need to include this option to specify how much time the +ADD TIME button adds to the timer. You can set it to 0 to force the wrap timer to count up rather than down.
autoCompleteCode	Default value: Empty string. Valid values: A string. Dependent on Countdown. If you set Countdown to true,

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JSON	Description
	when the timer reaches zero, the autoCompleteCode is stamped on the interaction record to log that it has been completed.

Inbound Options

JSON	Description
PopInboundInNotReady	Default value: true Valid values: true | false Determines whether an inbound call will pop an interaction record to agents in Not Ready.
WorklistNotReadyDelay	Default value: 0 Valid values: A positive integer. Defines the number of seconds that the Syntelate XA Worklist Engine waits before passing the call to the Workload of an agent in Not Ready.

Blind Transfer Options

JSON	Description
OriginCompare	Default value: An empty string. Valid values: A string.

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JSON	Description
	Defines the location code of the call to be transferred. An inbound call is assigned a call ID (the location code) by Avaya Aura CM. When the call is transferred it needs to preserve the call ID so that Avaya Aura CM knows that the transferred call is a continuation of the original call and not a new call. You need to specify this to enable Blind Transfers.
TransferTimeout	Default value: An empty string. Valid values: A string that is a time formatted as "HH:MM:SS". Defines the time in HH:MM:SS format that a transferred call will wait for the third party to answer it before the transfer is abandoned. In which case, the call remains live with the agent and must be completed by them.
ShowSameInteractionRecord	Default value: true Valid values: true | false Determines whether Blind Transfer will transfer Agent A's interaction record to Agent B (true) or create a new interaction record for Agent B (false). If you want a new interaction record to be created, then you also need to specify the FieldsToCopy (see below).
FieldsToCopy	Default value: An array of empty strings. Valid values: Comma-delimited strings of field names in

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JSON	Description
	Agent A's interaction record. Dependent on ShowSameInteractionRecord. If ShowSameInteractionRecord is false, you need to include this option if you want Blind Transfer to create a new interaction record for Agent B when Agent A transfers a call to them. FieldsToCopy lets Syntelate XA populate the new interaction record with data copied from Agent A's interaction record.

Consult Options

JSON	Description
ConsultAsExternalOnly	Default value: true Valid values: true | false Determines whether, for consult calls, Syntelate XA pops a new interaction record to the consulted party. » When ConsultAsExternalOnly is true, Syntelate XA does not pop an interaction record to Agent B. The record can only be seen by Agent A. » When ConsultAsExternalOnly is false, a new interaction record is popped to Agent B's desktop. Agent B sees an empty record and cannot see the customer details in Agent A's record.

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JSON	Description
ShowConsultToastMessage	Default value: true Valid values: true | false Defines whether the agent will be notified by Windows that Syntelate XA has passed a Consult to them. The notification is displayed in the bottom-right corner of the Windows desktop. **Note:** To enable Windows toast notifications, you need to add the following key to your Syntelate XA AppSettings.config file: <add key="Notifications" value="true" />
ShowConsultNotificationMessage	Default value: true Valid values: true | false Defines whether the agent will be notified by Syntelate XA that an agent has passed a Consult to them. The notification is displayed in the bottom-left corner of the Syntelate XA Agent Desktop.

Admin Options

JSON	Description
ListenFac	Default value: An empty string

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JSON	Description
	Valid values: A string in the format of an asterisk and a positive number, for example, "*90". Defines the Feature Access Code (FAC) number used by Avaya Aura CM to initiate a Service Observing Call. In Syntelate XA, you can use the Listen button in the Agent Control Centre to silently dial into and listen to the agent's call.
BargeFac	Default value: An empty string Valid values: A string in the format of an asterisk and a positive number, for example, "*91". Defines the Feature Access Code (FAC) number used by Avaya Aura CM to initiate a Service Observing Call. In Syntelate XA, you can use the Barge button in the Agent Control Centre to barge into (in other words, join) the agent's call.

3.5.4.3 Not Ready Reasons

Not ready reasons are held in the CTINOTREADYREASONS database table.

You can manage the not ready reasons either from the configuration desktop or directly in the database.

For guidance on using the configuration desktop to manage the not ready reasons, see the section 'Not Ready Reasons' in the PDF Guide, *Syntelate XA - Supervisor*.

If you prefer to use the database, ensure that you add a new record for each not ready reason. For guidance, see the PDF Guide *Syntelate XA - Database Tables*.

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3.6 Avaya IP Office

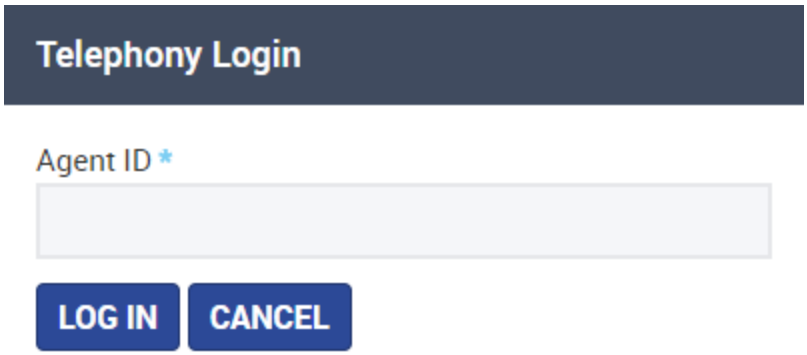
Syntelate XA supports several CTI (computer telephony integration) solutions for voice calls. One of these solutions is integration with Avaya IP Office™ via the Telephony API (TAPI). This is done using TAPILink Pro.

3.6.1 How It Works

At a very high level, here's how Syntelate XA's integration with IP Office works.

3.6.1.1 Telephony Login

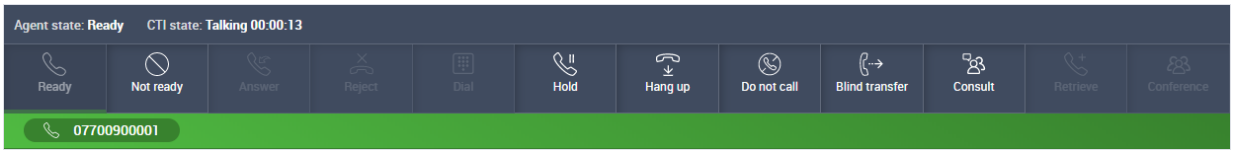
Where a Syntelate XA workzone has been configured to use IP Office, the agent will see the **Telephony Login** dialog box upon selecting that workzone.



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3.6.1.2 Telephony Toolbar

Once logged in to the IP Office workzone, a telephony toolbar is pinned to the top of the agent's desktop. It is via this that the agent performs most telephony operations.



The current CTI state (shown at the top of the toolbar) defines the buttons that are shown in the toolbar and whether they are clickable or grayed out.

The following table lists the CTI states in which each button is visible and clickable.

Button	CTI State(s) in Which Visible and Clickable
Answer	Ringing
Dial	Preview, Wrap Up, Worklist
Cancel preview	Preview
Hold	Talking, Consult Dialing, Consult, Consult Receiver, Conference, Conference Receiver
Unhold	Hold
Hang up	Dialing, Talking, Consult Receiver, Conference, Conference Receiver
Blind transfer	Talking

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Button	CTI State(s) in Which Visible and Clickable
Consult	Talking
Transfer	Consult Dialing, Consult, Conference
Retrieve	Consult Dialing, Consult, Conference
Conference	Consult

The agent can both hang up and close an interaction record by clicking a completion button. A completion button is clickable in the following CTI states: Preview, Talking, Wrap Up, Conference.

> **Note:** Any buttons in the telephony toolbar that you do not wish to use can be hidden. This is done via the **appsettings.config** file for Syntelate XA.

3.6.1.3 Telephony Logout

When the agent logs out of an IP Office workzone (by clicking  and then **Log out**), Syntelate XA logs them out of IP Office.

The agent can only log out when their agent state is **Not ready**.

3.6.2 Supported Functionality

The following functionality is supported:

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- Go ready / not ready
- Answer (inbound calls)
- Dial (outbound calls)
- Cancel preview
- Hold/unhold
- Hang up (by agent/customer)
- Blind transfer
- Consult
- Conference

3.6.2.1 Going Ready

When an agent clicks **Ready** in the CTI toolbar, in IP Office their phone is taken out of “do not disturb”. They can then receive inbound calls.

For each workzone, you can define whether:

- The workzone is outbound only.
- The workzone accepts inbound calls but only for agents in a particular agent group.
- The workzone accepts inbound calls for all agents.

If an agent is not set up to receive inbound calls for a particular workzone in Syntelate XA, then going ready while logged into that workzone does *not* turn off do not disturb in IP Office. Clicking **Ready** inSyntelate XAdoes, however, allow them to be passed other types of interaction, such as outbound calls to make, emails, or chats.

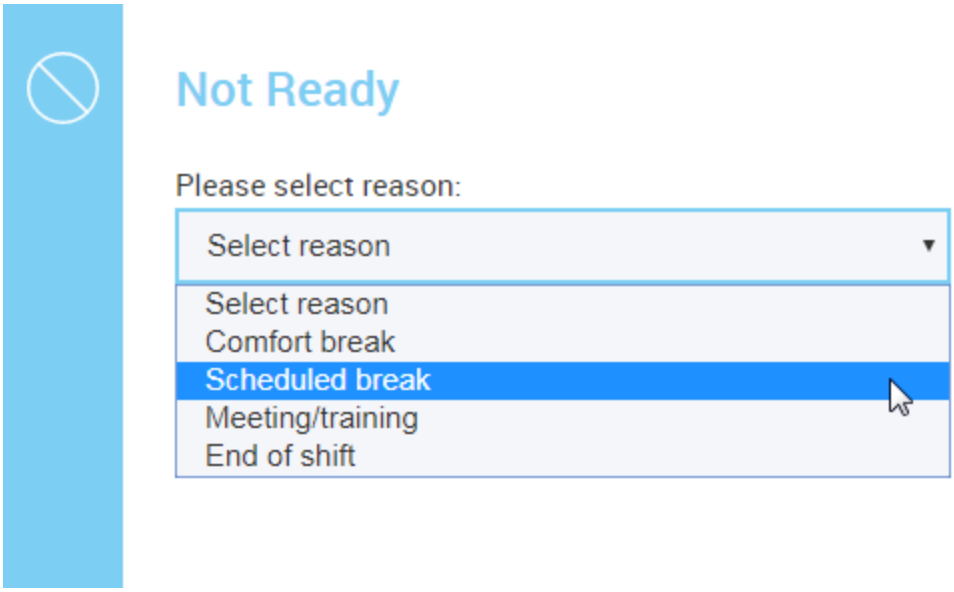
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Note: At the end of each call, Syntelate XA checks whether the agent is set up to receive inbound calls. Syntelate XA also performs this check every 30 seconds while the agent is waiting for a call.

This lets you move an agent into or out of the inbound agent group to meet demand.

3.6.2.2 Going Not Ready

When the agent clicks **Not ready**, Syntelate XA prompts the agent to select a not ready reason.



You must define the not ready reasons that you want to use.

If the agent goes not ready while on a call, their agent state is set to **Pending Not Ready**. This changes to **Not Ready** upon completion of the call.

Going not ready turns on do not disturb in IP Office.

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> **Note:** If you have not set any not ready reasons, the agent will be set **Not Ready** or **Pending Not Ready** immediately upon clicking **Not ready** (without having to first select a reason).

3.6.2.3 Answer

When an agent clicks **Answer** to accept an inbound call, the following fields are populated in the interaction record:

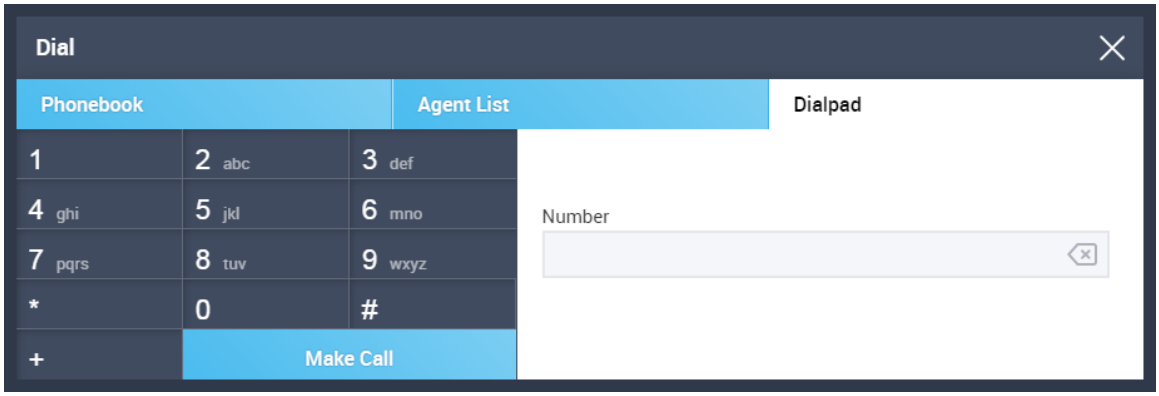
- **LKTL_CLI:** Calling line identification
- **LKTL_DDI:** Direct dial-in
- **LKTL_UCID:** Universal call identifier
- **LKTL_UUI:** User-to-user information

For existing customers, this lets Syntelate XA match on the customer's phone number and then display the customer's details to the agent.

3.6.2.4 Dial

If the agent clicks **Dial**, the **Dial** window shows.

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The agent can use this window to make outbound calls.

Note: If the agent is viewing a record that contains a phone number, the agent can also click the or button beside the phone number to dial it.

immediately dials the customer, whereas sends the customer's number to the **Dial** window.

3.6.2.5 Cancel Preview

Syntelate XA can pass outbound calls to the agent in preview. This lets the agent review the customer's details before making the call.

If the agent decides not to make the call, they can click **Cancel preview**. This completes the call using the completion code that has been defined for the workzone. The agent then moves onto the next item in their workload.

If the agent is set up to receive inbound calls, an outbound record in preview can be interrupted by an inbound call.

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3.6.2.6 Hang Up

If the agent is disconnected from the customer during a call – for example, due to the customer hanging up – a message informs the agent of this.

The agent can hang up by clicking **Hang up** in the CTI toolbar. Alternatively, the agent can both hang up and close the interaction record by clicking a completion button.

3.6.2.7 Blind Transfer

There are two ways in which the agent can transfer the customer to another number:

- Blind transfer
- Warm transfer (in other words, transferring from a consult)

With blind transfer, the agent is immediately disconnected from the customer upon initiating the transfer. As such, the party to whom the call is transferred comes at it "blind" (with no introduction from the initial agent about what the customer is calling about).

3.6.2.8 Consult and Conference

Consult lets the agent speak to another party while the customer is on hold. To use consult, the agent's phone must have exactly two line appearances. Syntelate XA does not support more than two line appearances for an agent phone.

While on a consult, the agent can do the following:

- **Transfer:** Transfers the call to the other party and ends the call for the agent ("warm transfer").
- **Retrieve:** Drops the other party from the call and takes the customer off hold.

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- **Conference:** Takes the customer off hold and lets them participate in a three-way call with the agent and the other party.

Syntelate XA supports both **agent consult** and **external consult**.

With agent consult, the other party is another agent in Syntelate XA who is logged into a workzone that uses the same universe ("agent B"). While on a consult, agent B can see the customer's details in their desktop but cannot edit them. Agent B's telephony toolbar shows appropriate buttons based on their role as consult receiver.

If agent A transfers the call, agent B's desktop becomes editable and their telephony toolbar updates as appropriate.

With external consult, the other party is either:

- Anyone other than an agent logged in to Syntelate XA
- An agent logged in to Syntelate XA but on a workzone that uses a different universe

Note: With agent consult, transfer immediately closes the record for agent A and puts agent A into a ready or not ready state as appropriate.

With external consult, transfer puts agent A into wrap-up.

EXAMPLE

Emily, a customer of Inisoft Travel, has a query about her hotel. She calls Inisoft Travel but mistakenly dials the Business Travel number instead of the Personal Travel number. She gets through to Zac.

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Zac quickly realizes that Emily has got through to the wrong person, and so he clicks **Consult** and then selects the Personal Travel hunt group (**agent consult**). This puts Emily on hold. Zac's call is passed to Jack, and Zac briefly explains to Jack what Emily is calling about. He then **transfers** the call to Jack (**warm transfer**).

Jack speaks with Emily to find out more about her problem. Realizing that he needs to speak with the hotel to sort the matter, he clicks **Consult** and then dials the hotel's number (**external consult**). This again puts Emily on hold. Jack speaks with the hotel and gets to the bottom of the matter.

Jack now clicks **Retrieve**, which ends the call with the hotel and takes Emily off hold. Jack is now able to tell Emily the answer to her query.

3.6.3 What You Need

For Syntelate XA to integrate with IP Office, you must have:

- Avaya IP Office™
- TAPILink Pro configured for third-party call control and installed on the Syntelate XA server

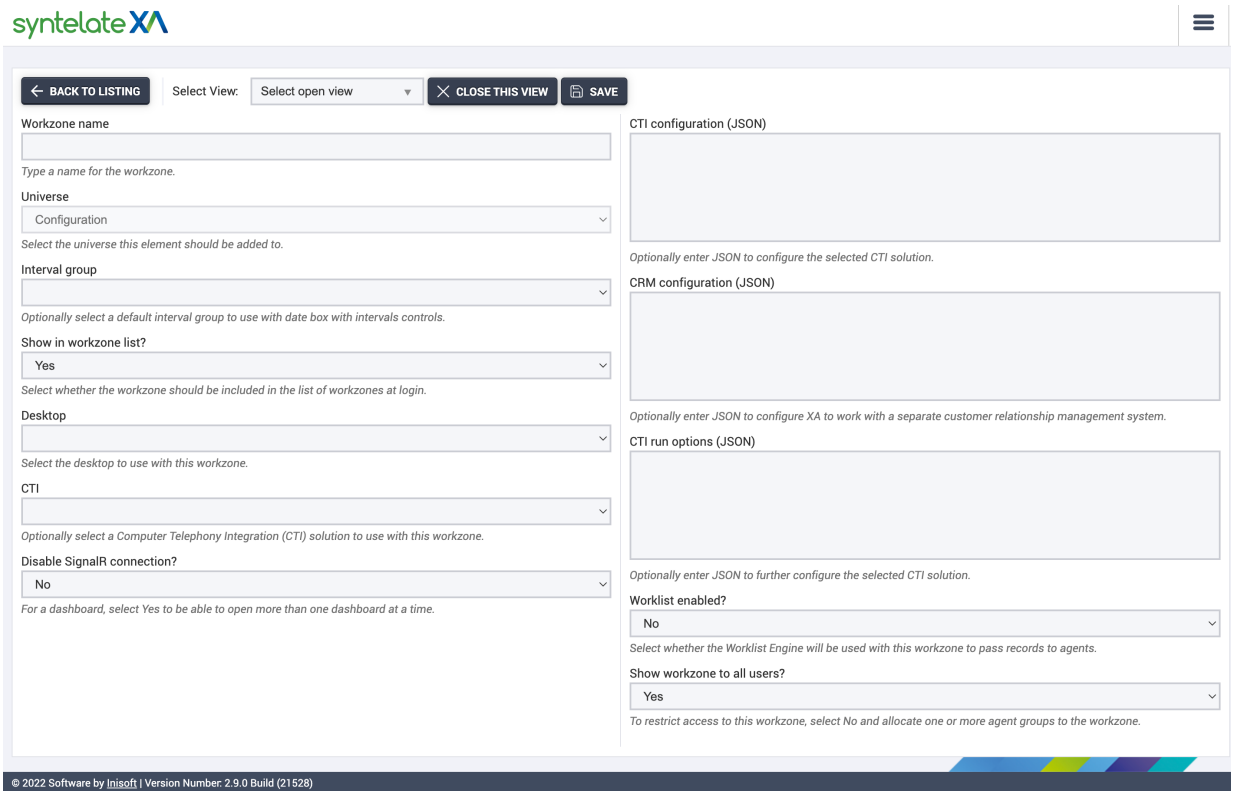
3.6.4 Avaya Contact Center Select

Syntelate XA also supports the use of Avaya Contact Center Select (ACCS) with IP Office.

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3.6.5 Workzone Configuration

In Syntelate XA, all CTI integrations are configured in Designer's Workzone Editor. Here is a screenshot of the configuration screen in Workzone Editor.



The following three settings in a CTI workzone must be completed to create a telephony channel in Syntelate XA:

- **CTI**: Offers types of telephony to choose from.
- **CTI configuration (JSON)**: This is where you specify the telephony server connections.

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- **CTI run options (JSON)**: This is where you specify the telephony behavior at runtime, in other words, how Syntelate XA should handle calls on the Syntelate XA Agent Desktop.

The CTI configuration and run options need to be provided in JSON format.

Documentation of each option is given in the sections below.

IP Office and ACCS

To set up IP Office to use ACCS, make sure you include the ACCS settings that are in the CTI configuration documentation below.

3.6.5.1 CTI configuration (JSON)

TAPI configuration

```
{
    /* Standard settings */
    "CtiSource": "IPOffice",
    "CtiApiUrl": " ",
    "LoginRequired": true,
    "AutoLogin": true,
    "RecordLoginDetails": true,
```

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```
    "PopOnOutgoing": true,

    /* TAPI server settings */
    "cancelPreviewCode": "~PrvCncl~",

    /* ACCS settings */
    "CctConfig": {
        "Primary":" ",
        "Domain": " ",
        "Port": " ",
        "SingleSignOn": true,
        "AfterCallWorkCode": ""
        }
}
```

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Standard Settings

The standard settings are required.

JSON Key	Description
CtiSource	Default value: An empty string. Valid values: A string that is either "POM", "TSAPI" or "IPOffice". Defines the type of telephony integration.
CtiApiUrl	Default value: An empty string. Valid values: A string that contains an absolute URL. Defines the URL of the Syntelate XA Web API for the CTI, hosted on your Syntelate XA instance. We recommend you host Syntelate XA near the phone system (on the same domain or in the same data center) to avoid latency issues.
AutoLogin	Default value: true Valid values: true | false Determines whether Syntelate XA will automatically log in the agent. If AutoLogin fails for any reason, Syntelate XA shows the log in dialog to the agent so they can log in manually. We recommend setting this to true.
RecordLoginDetails	Default value: true Valid values: true | false

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JSON Key	Description
	Determines whether the agent's login details will be stored in the AGENTLASTLOGIN table after they first successfully log in. We recommend setting this to true.
PopOnOutgoing	Default value: true Valid values: true | false Determines whether the Dial telephony button will pop a new interaction record to the agent desktop if it doesn't already have a interaction record open. Only affects agents who dial an outbound call while in Not Ready or Waiting.

TAPI Settings

The TAPI setting is required.

JSON Key	Description
cancelPreviewCode	Default value: An empty string. Valid values: A string that is a completion code present in the COMPLETION_CODES table. Defines the completion code to use when the agent clicks Cancel preview. References the CODE field of the COMPLETION_ CODES table.

ACCS Settings

You only need to include the ACCS settings if you are using IP Office with ACCS.

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JSON Key	Description
Primary	Default value: An empty string. Valid values: A string that is an IP address. Defines the IP address of ACCS.
Domain	Default value: An empty string. Valid values: A string that is a domain address. Defines the domain that points to the IP address for ACCS.
Port	Default value: An empty string. Valid values: A string that is a whole number. Defines the port number that is required by the IP address of ACCS.
AfterCallWorkCode	Default value: An empty string. Valid values: A string. Defines the code that tells ACCS not to pass calls to agents who are in wrap-up.

3.6.5.2 CTI run options (JSON)

TAPI runtime options

```
{
```

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```
    /* Go ready options */
    "GoReadyOptions": {
        "IncomingCallsAgentGroup": 0,
        "OutboundOnly": false,
        "OutboundOnlyAuxCode": 0,
        "GoReadyWithManualIn": false
    },
    /* Call options */
    "CallOptions": {
        "ExtnLength": 5,
        "ExtnLengthComparison": ">",
        "ExternalPrefix": "0",
    },
    /* Wrap timer options */
```

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```
    "WrapTimer": {
        "Countdown": true,
        "CountdownTimeoutSecs": 30,
        "CountdownAddTimeCount": 1,
        "CountdownAddTimeSecs": 10,
        "autoCompleteCode": "AUTOWRAP"
    },
}
```

Go Ready Options

JSON	Description
IncomingCallsAgentGroup	Default value: 0 Valid values: A positive integer. Defines the agent group number that will be set Ready for inbound calls. References the AgentGroupNo field of the AGENTGROUPS table. If you omit this setting, then all agents will be available for inbound calls (unless you also set OutboundOnly to true).

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JSON	Description
OutboundOnly	Default value: false Valid values: true | false Determines whether the workzone is outbound only. Set to false if it will handle both inbound and outbound calls.
OutboundOnlyAuxCode	Default value: 0 Valid values: A positive integer. Defines the Aux reason code that tells the CTI system that the agent is busy handling calls and it should not pass the agent inbound calls.
GoReadyWithManualIn	Default value: false Valid values: true | false Determines whether the agent needs to manually click Answer to pick up an inbound call. Set to false if inbound calls should be answered automatically. Exception: the settings of the agent's phone (their extension number) can override this.

Call Options

JSON	Description
ExtnLength	Default value: 0 Valid values: A positive integer.

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JSON	Description
	Defines the number of digits in internal agent phone extensions. If you have varying lengths of internal extension (for example, a mix of 4 digit and 5 digit extensions) then set this to the higher number (and set ExtnLengthComparison accordingly).
ExtnLengthComparison	Default value: Empty string. Valid values: An operator (such as !=, >, or >=). Determines when ExternalPrefix is assigned to a phone number, based on ExtnLength. For example, if ExtnLength is 5 and ExtnLengthComparison is !=, then ExternalPrefix is assigned to any phone number with a length other than 5 (numbers with 4, 7 or 11 digits, and so on).
ExternalPrefix	Default value: Empty string. Valid values: A positive number. Defines the prefix Syntelate XA should use when dialing external numbers.

Wrap Timer Options

JSON	Description
Countdown	Default value: true Valid values: true | false

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JSON	Description
	Determines whether automatic wrap-up of calls is enabled. If true, calls are wrapped up when the countdown is complete. When true, Countdown is dependent on the other wrap timer options in this group.
CountdownTimeoutSecs	Default value: 0 Valid values: A positive integer. Defines the number of seconds that the wrap timer counts down from.
CountdownAddTimeCount	Default value: 0 Valid values: 0 | 1 (as integers, not strings) Determines whether the **+ ADD TIME** button is displayed on the Agent Desktop. 0 is false and 1 is true. If you set this to 1, then you need to include the option CountdownAddTimeSecs. See below.
CountdownAddTimeSecs	Default value: 0 Valid values: A positive integer that represents a time in seconds. Dependent on CountdownAddTimeCount. If you have set CountdownAddTimeCount to 1, then you need to include this option to specify how much time the +ADD TIME button adds to the timer. You can set it to 0 to force the wrap timer to count up rather than down.

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JSON	Description
autoCompleteCode	Default value: Empty string. Valid values: A string. Dependent on Countdown. If you set Countdown to true, when the timer reaches zero, the autoCompleteCode is stamped on the interaction record to log that it has been completed.

3.6.5.3 Not Ready Reasons

Not ready reasons are held in the CTINOTREADYREASONS database table.

You can manage the not ready reasons either from the configuration desktop or directly in the database.

For guidance on using the configuration desktop to manage the not ready reasons, see the section 'Not Ready Reasons' in the PDF Guide, *Syntelate XA - Supervisor*.

If you prefer to use the database, ensure that you add a new record for each not ready reason. For guidance, see the PDF Guide *Syntelate XA - Database Tables*.

3.7 Avaya POM

Syntelate XA supports several CTI (computer telephony integration) solutions for voice calls. One of these solutions is integration with Avaya Proactive Outreach Manager (POM) via Avaya Aura® AE Services TSAPI.

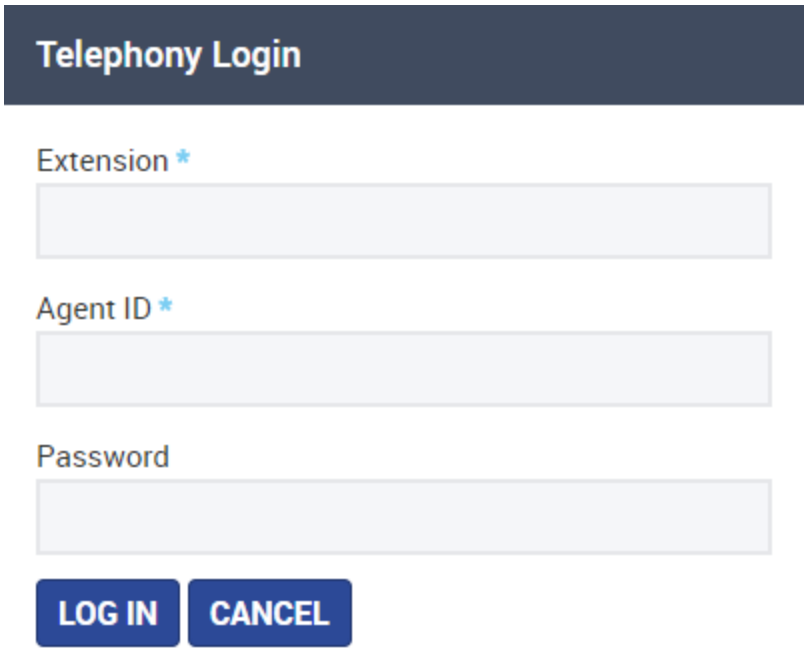
Our integrations with POM and TSAPI have been compliance tested by Avaya.

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At a very high level, here's how Syntelate XA's integration with POM works.

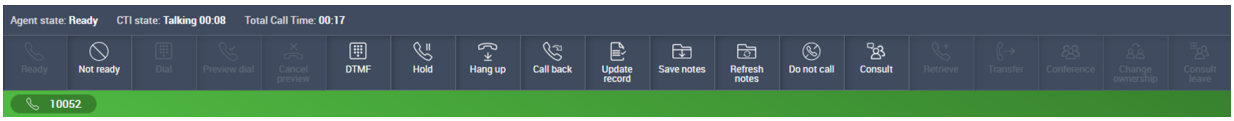
3.7.1 Telephony Login

If a Syntelate XA workzone has been configured to use POM, after logging in to that workzone, agents will see the **Telephony Login** dialog.



3.7.2 Telephony Toolbar

For all telephony workzones, a telephony toolbar is pinned to the top of the desktop.



The toolbar consists of three parts:

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1. Session status bar
2. Telephony buttons
3. Call status bar

3.7.2.1 Session Status Bar

The session status bar displays the following information on the agent's current session:

- Agent state
- CTI state
- Timer
- Total call time

Agent state

The possible agent states are:

- **Ready**: when an agent is active and taking calls.
- **Pending not ready**: when an agent has clicked on the **Not ready** telephony button while on a call. Once that call is completed, the agent's state changes to not ready.
- **Not ready**: when an agent has chosen to go not ready, for a reason such as going on a lunch break, end of shift, training session etc.

CTI state

The possible CTI states are:

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- **Idle:** when an agent is between calls.
- **Preview**: when an agent is on a preview call.
- **Dialing** : when a number is being dialed.
- **Talking**: when a call is connected.
- **Wrap up**: when an agent or a customer has disconnected the call.
- **Held**: when a call is on hold.
- **Consult**: when an agent initiates a consult or a consult is in progress.
- **Callback**: when a callback record returns.
- **Conference owner** or **Conference passive**: when in a conference call, indicates which role the agent has.

The current **CTI state** determines which buttons will be active.

> **Note:** Any buttons in the telephony toolbar that you do not wish to use can be hidden. This is done via the **appsettings.config** file for Syntelate XA.

Timer and Total Call Time

The **Timer** displays the duration of the current CTI state. The **Total call time** displays the duration of the entire call.

3.7.2.2 Telephony Buttons

The following functionality is supported:

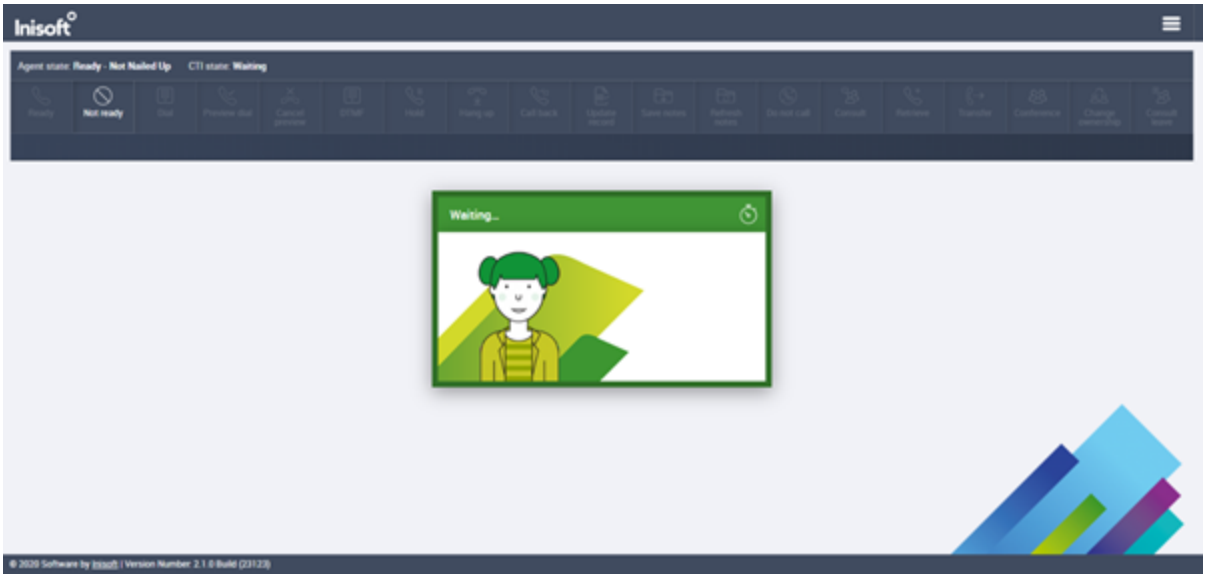
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- Ready and Not ready
- Preview dial, Dial and Cancel preview
- DTMF
- Hold and unhold
- Hang up (by agent or customer)
- Callback
- Update record
- Save agent notes
- Refresh agent notes
- Do not call
- Consult
    - Retrieve
    - Transfer
    - Conference
    - Change ownership
    - Consult leave

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Ready

If an agent is set up to receive inbound calls, when they click the **Ready** button in the telephony toolbar both the **Agent state** and **CTI state** are set to **ready**.



For each workzone, you can define whether:

- The workzone is outbound only.
- The workzone accepts inbound calls but only for agents in a particular agent group.
- The workzone accepts inbound calls for all agents.

If an agent is not set up to receive inbound calls, their phone is never set to ready. Clicking **Ready** inSyntelate XA does, however, allow them to be passed other types of interaction, such as outbound calls to make, emails, or chats.

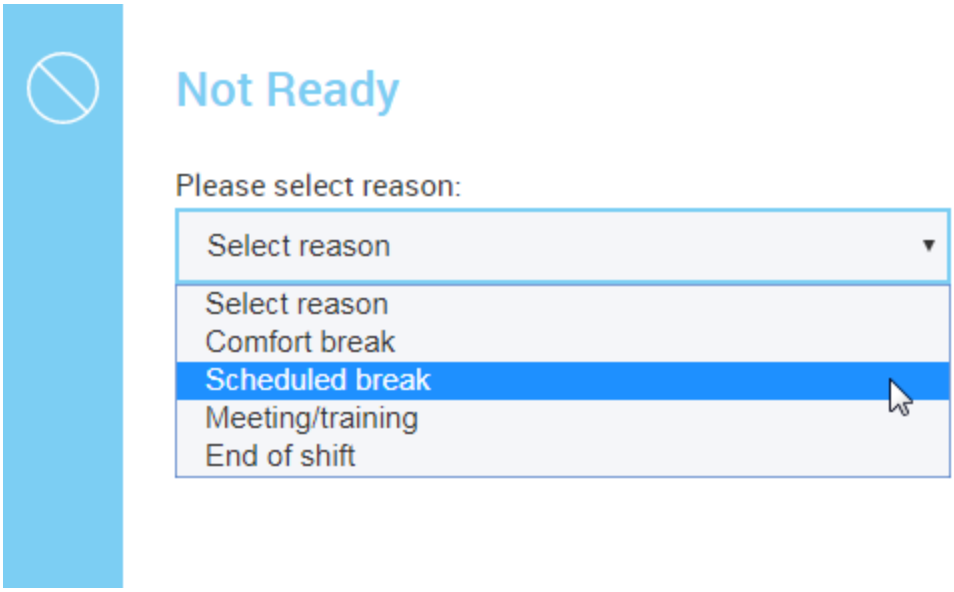
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Note: At the end of each call, Syntelate XA checks whether the agent is set up to receive inbound calls. Syntelate XA also performs this check every 30 seconds while the agent is waiting for a call.

This lets you move an agent into or out of the inbound agent group to meet demand.

Not ready

When the agent clicks **Not ready**, Syntelate XA prompts the agent to select a not ready reason.



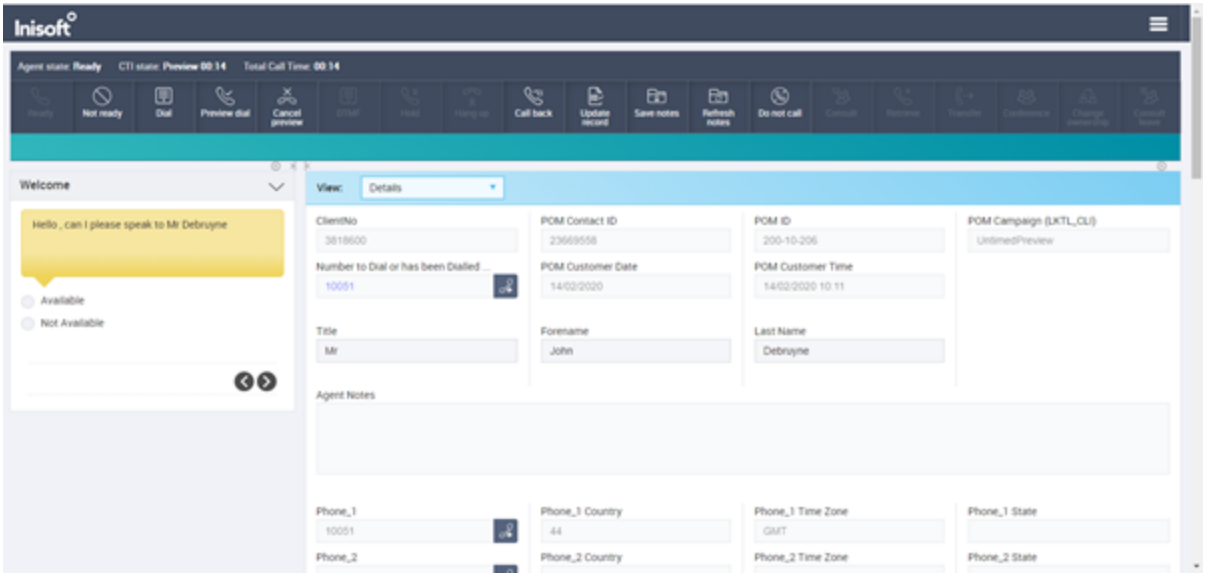
If the agent goes not ready while on a call, their agent state is set to pending not ready. This changes to not ready upon completion of the call.

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> **Note:** If you have not defined any not ready reasons, the agent will be set to not ready or pending not ready immediately upon clicking the **Not ready** button without having to first select a reason.

Preview dial, Dial and Cancel Preview

In a POM channel in Syntelate XA, when an agent receives an outbound record from POM, and the POM record is either Timed or Untimed, the agent's CTI state is automatically switched to Preview. This lets the agent preview the customer's details before making the call.



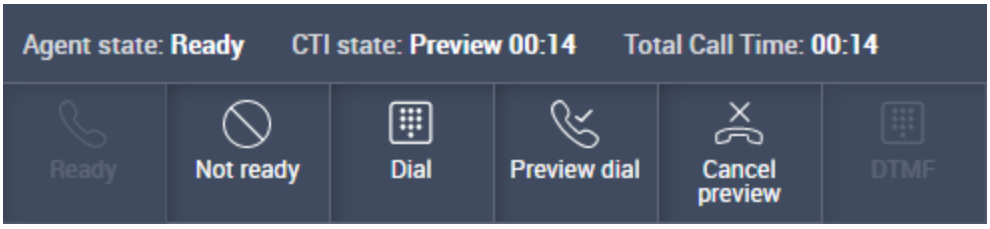
There are two types of Preview:

- Timed: when the **timer** reaches zero (0), the default number will automatically be dialed.
- Untimed: the **timer** counts up indefinitely unless the call is initiated or canceled.

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If the POM job is a Timed Preview job, then the agent has a set number of seconds to browse the record before the default number is automatically dialed. Alternatively, the agent can also press Preview Dial or Dial before the timer runs out.

If the POM job is an Untimed Preview job, then the agent will be in Preview until they press either Preview Dial to dial the default number or Dial to dial a different number.



If an agent clicks the **Preview dial** button,Syntelate XA will dial the default number associated with the customer record. The default number is specified in the POM configuration.

The **Dial** button displays the **Dial** window. It contains a phonebook and dialpad. Agents can use the **Dial** window to make outbound calls.

If an agent decides not to make the call, they can click **Cancel preview**. As a result, the interaction record is placed into Wrap Up, which initiates a countdown timer.

When the countdown reaches 0, the record is automatically completed with the completion code that has been assigned to the POM job; as a result, the agent will be free to work on another interaction.

However, during the countdown, the agent can choose to complete the call manually if they want to complete the record sooner.

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> **Note:** Unlike other telephony integrations, in POM if an agent is in a group that handles inbound calls, an outbound record in Preview *cannot* be interrupted by an inbound call.

Hold

If an agent clicks on the Hold button, the customer will be placed on hold and unable to hear the agent. To retrieve the customer the agent needs to click on the button again.

Hang Up

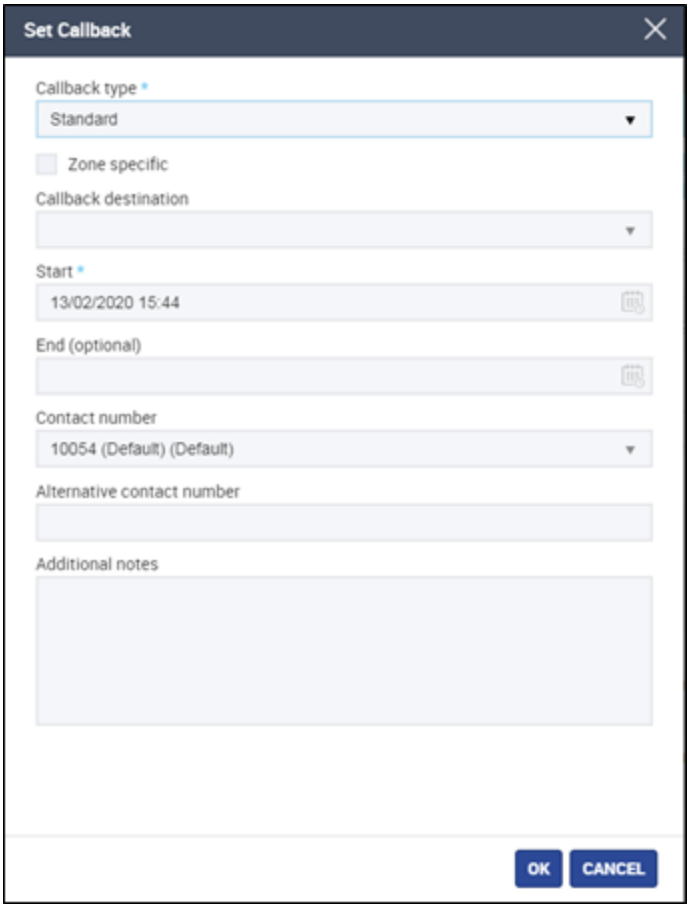
If an agent is disconnected from the customer during a call – for example, due to the customer hanging up – a message informs the agent of this.

Agents can hang up by clicking **Hang up** in the CTI toolbar. Alternatively, agents can both hang up and close the interaction record at the same time by clicking a completion button.

Callback

Agents can book a callback at any point in their current session. If they click the **Callback** button they see the **Set Callback** dialog.

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Update record

POM data can be updated at anytime by clicking on the **Update record** button, which will write any POM data back to the server. If there is a validation error, the agent will see a notification.

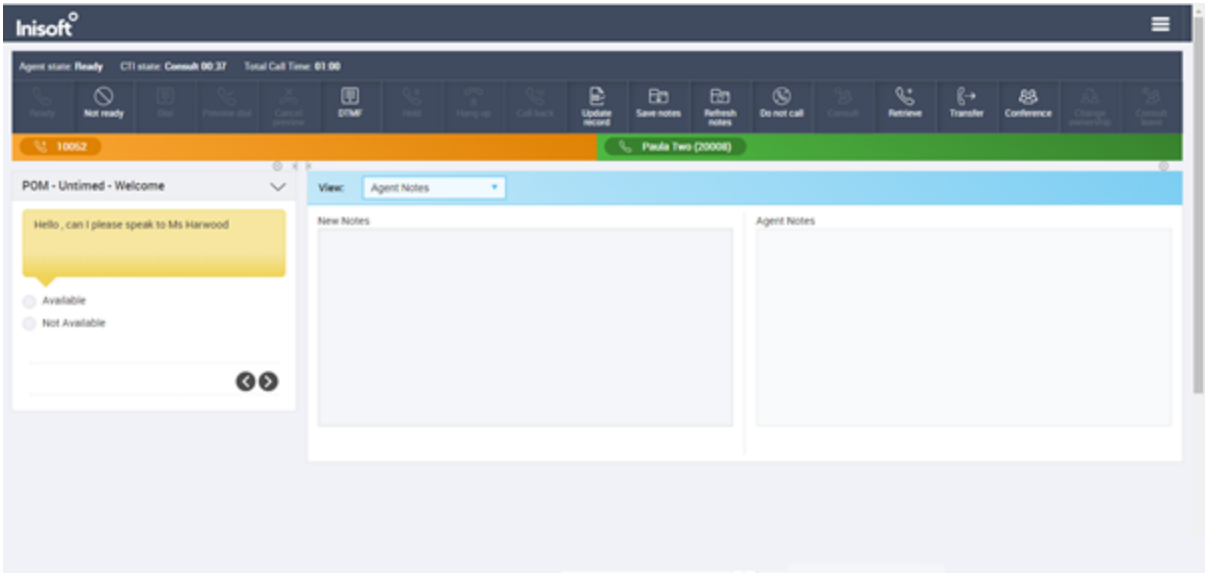
Agent notes

Agents can use the **New Notes** and **Agent Notes** text areas while in a consult or conference call. During the call, both the owner and the recipient of the consult or conference can enter notes at the same time.

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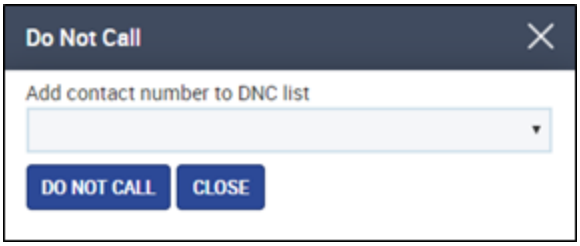
New notes are typed into the **New Notes** text area and are saved to the interaction record using the **Save notes** button. Once saved, notes appear in the read-only **Agent Notes** text area.

Agents can click on the **Refresh notes** button during a consult or conference if they want to check if the other party has added new notes.



Do not call

If agents click the Do not call button,Syntelate XAdisplays the Do not call dialog, which contains a dropdown and two buttons.



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Consult and Conference

Consult lets an agent speak to another party while the customer is on hold. To use consult, the agent's phone must have exactly two line appearances. Syntelate XA does not support more than two line appearances for an agent phone.

While on a consult, an agent can do the following:

- **Transfer:** Transfers the call to the other party and ends the call for the agent ("warm transfer"). The agent will be presented with a new call.
- **Retrieve:** Drops the other party from the call and takes the customer off hold.
- **Conference:** Takes the customer off hold and lets them participate in a three-way call with the agent and the other party.
- **Change ownership**: Assigns the call to the other party's ownership, giving them full control over the call.
- **Consult leave**: Visible only to a recipient of a conference or consult, this button lets them exit the call.

Syntelate XA supports both agent consult and external consult.

With agent consult, the other party is another agent in Syntelate XA who is logged into a workzone that uses the same universe ("agent B"). While on a consult, agent B can see the customer's details in their desktop but cannot edit them. Agent B's telephony toolbar shows appropriate buttons based on their role as consult receiver.

If agent A transfers the call, agent B's desktop becomes editable and their telephony toolbar updates as appropriate.

With external consult, the other party is either:

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- Anyone other than an agent logged in to Syntelate XA
- An agent logged in to Syntelate XA but on a workzone that uses a different universe.

Note: With agent consult, transfer immediately closes the record for agent A and puts agent A into a ready or not ready state as appropriate.

With external consult, transfer puts agent A into wrap-up.

EXAMPLE

Emily, a customer of Inisoft Travel, has a query about her hotel. She calls Inisoft Travel but mistakenly dials the Business Travel number instead of the Personal Travel number. She gets through to Zac.

Zac quickly realizes that Emily has got through to the wrong person, and so he clicks **Consult** and then selects the Personal Travel hunt group (**agent consult**). This puts Emily on hold. Zac's call is passed to Jack, and Zac briefly explains to Jack what Emily is calling about. He then **transfers** the call to Jack (**warm transfer**).

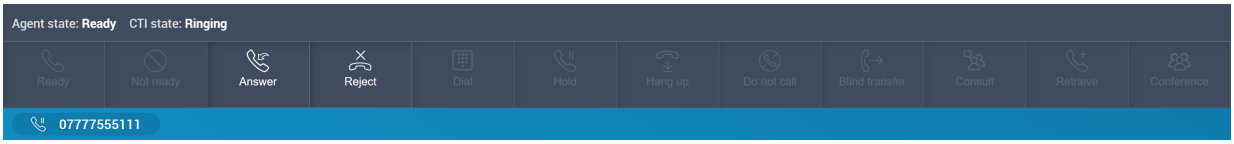
Jack speaks with Emily to find out more about her problem. Realizing that he needs to speak with the hotel to sort the matter, he clicks **Consult** and then dials the hotel's number (**external consult**). This again puts Emily on hold. Jack speaks with the hotel and gets to the bottom of the matter.

Jack now clicks **Retrieve**, which ends the call with the hotel and takes Emily off hold. Jack is now able to tell Emily the answer to her query.

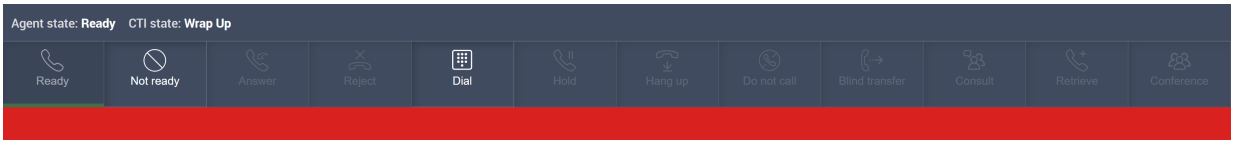
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3.7.2.3 Call State Banner

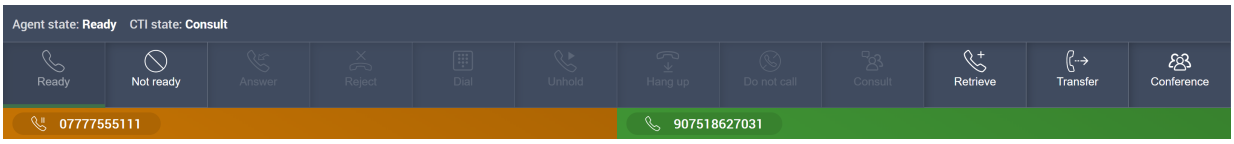
The call state banner indicates your agent and CTI states and provides other information about the current call, such as the external party's phone number. The banner also changes color to help you manage your calls. For example, the banner is blue when your CTI state is Ringing.



Where the customer has been disconnected, the **call state banner** turns red, indicating you're in wrap-up.



When you're on a consult or conference, the banner splits in two to show the two parties you're speaking with. On a consult that you have initiated, click on a banner to switch between the party whom you are speaking with and the party on hold.



3.7.2.4 Telephony Logout

When the agent logs out of a POM-enabled workzone (by clicking  and then **Log out**), Syntelate XA logs them out of POM.

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The agent can only log out when their agent state is **Not ready**.

3.7.3 What You Need

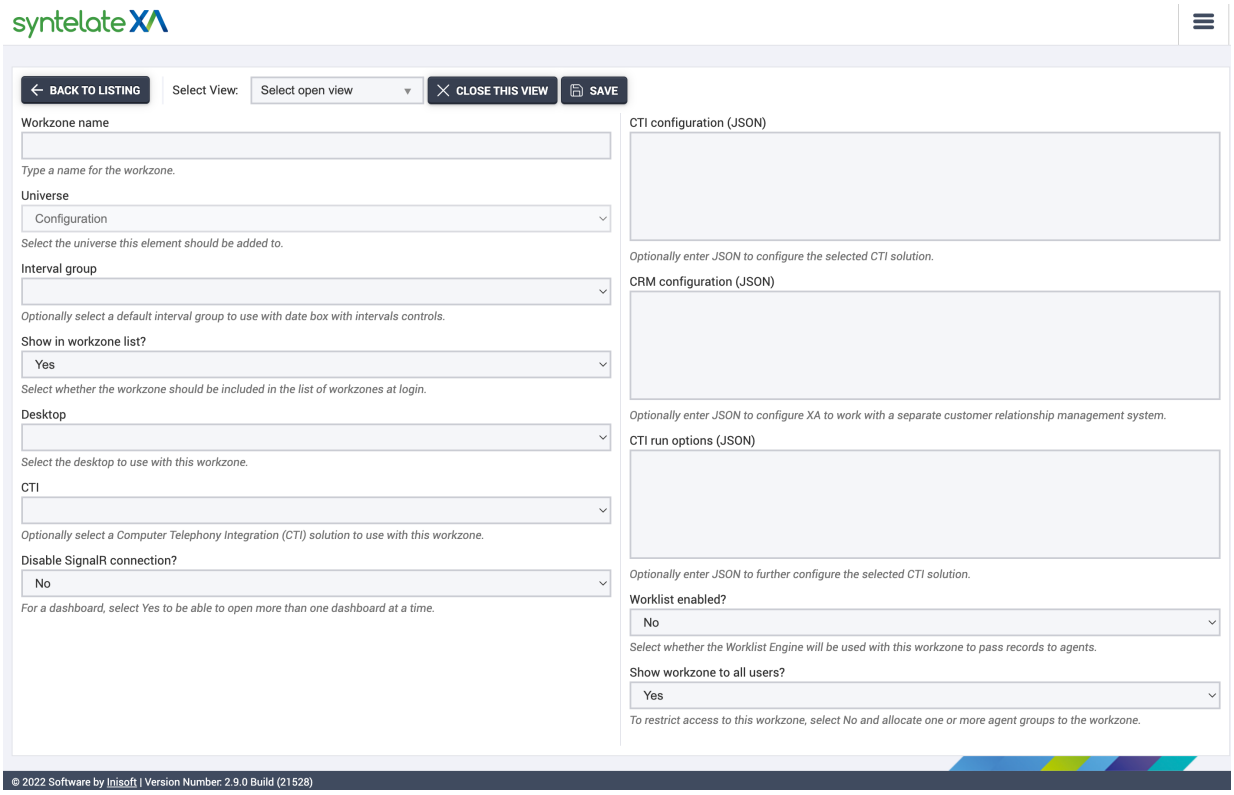
For Syntelate XA to integrate with Avaya POM, you must have:

- Avaya Aura® Communication Manager.
- Avaya Aura® Application Enablement Services.
- The TSAPI Client installed on your Syntelate XA server.

3.7.4 Workzone Configuration

In Syntelate XA, all CTI integrations are configured in Designer's Workzone Editor. Here is a screenshot of the configuration settings page in Workzone Editor.

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The following three fields in a CTI workzone must be completed to create a telephony channel in Syntelate XA:

- **CTI**: Offers types of telephony to choose from.
- **CTI configuration (JSON)**: This is where you specify the telephony server connections.
- **CTI run options (JSON)**: This is where you specify the telephony behavior at runtime, in other words, when it's handling calls on the Syntelate XA Agent Desktop.

The CTI configuration and run options need to be provided in JSON format.

Below, you'll see examples and descriptions of each option.

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3.7.4.1 CTI configuration (JSON)

```
{
    /* Standard settings */
    "CtiSource":"POM",
    "CtiApiUrl": "",
    "LoginRequired": true,
    "AutoLogin": false,
    "RecordLoginDetails": true,

    /* Localization settings */
    "Timezone":    {
        "Zone":"Default",
        "Locale":"",
        "Tz":""
```

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```
    },

    /* General options */
    "GeneralOption": {
        "AutoWrapup": true,
        "ValidateCertificate": false
    },

    /* List of POM servers */
    "Servers": [
    /* server 1 */ {
        "Name": "",
        "Ip":"",
        "Port":""
```

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```
        },
    /* server 2 */ {
        "Name": "",
        "Ip":"",
        "Port":""
        }
    ],

    /* REST or SOAP settings */
    "WebService": {
        "Server":"https://xxx.xxx.xxx",
        "Username":"",
        "Password":""
    }
```

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```
    /* Inbound settings for blended POM */
    "PassThru": {
        "CtiSource": "TSAPI",
        "CtiApiUrl": "",
        "LoginRequired": true,
        "cancelPreviewCode": "~PrvCncl~",
        "ServerName": "",
        "Username": "",
        "Userpassword": "",
        "TimeoutSeconds": "10",
        "PrivateDataVersions": "8"
    },
}
```

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Standard Settings

The standard settings are required.

JSON Key	Description
CtiSource	Default value: An empty string. Valid values: A string that is either "POM", "TSAPI" or "IPOffice". Defines the type of telephony integration.
CtiApiUrl	Default value: An empty string. Valid values: A string that contains an absolute URL. Defines the URL of the Syntelate XA Web API for the CTI, hosted on your Syntelate XA instance. We recommend you host Syntelate XA near the phone system (on the same domain or in the same data center) to avoid latency issues.
AutoLogin	Default value: true Valid values: true | false Determines whether Syntelate XA will automatically log in the agent. If AutoLogin fails for any reason, Syntelate XA shows the log in dialog to the agent so they can log in manually. We recommend setting this to true.
RecordLoginDetails	Default value: true Valid values: true | false

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JSON Key	Description
	Determines whether the agent's login details will be stored in the AGENTLASTLOGIN table after they first successfully log in. We recommend setting this to true.
PopOnOutgoing	Default value: true Valid values: true | false Determines whether the Dial telephony button will pop a new interaction record to the agent desktop if it doesn't already have a interaction record open. Only affects agents who dial an outbound call while in Not Ready or Waiting.

Localization Settings

These are required settings.

JSON Key	Description
Zone	Default value: "Default" Valid values: A string. The name of the POM zone. We recommend using the default value.
Locale	Default value: "Default" Valid values: A string that is an ISO language code. Examples: "en-US" for US English or "en-GB" for British English.
Tz	Default value: "Default"

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JSON Key	Description
	Valid values: A string that is the ISO time zone abbreviation for the local region where Syntelate XA is being used. For example, "UTC".

General Options

These are optional settings.

JSON Key	Description
AutoWrapup	Default value: true Valid values: true | false When true, this will automatically assign a completion code to the interaction record and close it when the WrapUp timer reaches zero.
ValidateCertificate	Default value: true Valid values: true | false When true, this will validate the POM certificate when the agent logs in to POM. When false, validation is disabled.

List of Servers

These are required settings.

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Note: The server group of settings is formatted as an array. If you are using failover for Syntelate XA, then in this array you must specify the details of each POM server that's part of the failover infrastructure. But if you are not using failover, then you only need to provide the details for one server.

JSON	Description
Name	Default value: "Default" Valid values: A string that is the name of the Avaya POM server.
Ip	Default value: "Default" Valid values: A string that is the IP address of the Avaya POM server.
Port	Default value: "Default" Valid values: An integer that is the port of the Avaya POM server.

Web Service Settings

The WebService group is a required setting and it defines the connection to your Avaya POM Web API, which is a RESTful API.

JSON Key	Description
Server	Default value: An empty string. Valid values: A string that is the absolute URL for the Avaya POM server and its POM web service. Use the following URL, replacing SERVERNAME with the name of your Avaya POM server:

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JSON Key	Description
	"https://#SERVERNAME#/VP_POM_Service/v4/"
Username	Default value: An empty string. Valid values: A string that is your username for the web service.
Password	Default value: An empty string. Valid values: A string that is your password for the web service.

PassThru Options

The PassThru group is an optional setting, only used in POM blend implementations where Syntelate XA is used as both the inbound and outbound desktop. The PassThru group configures the inbound phone system.



Note: PassThru is an abbreviation of **Pass through Telephony Server**.

JSON Key	Description
CtiSource	Default value: An empty string. Valid values: "TSAPI" or "TAPI" The type of inbound phone system being blended with POM.
CtiApiUrl	Default value: An empty string. Valid values: A string that is the URL to the inbound phone system's API.

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JSON Key	Description
LoginRequired	Default value: true Valid values: true | false Ensures that users can log in to the inbound phone system.
ServerName	Default value: An empty string. Valid values: A string that is the name of the server used by the inbound phone system.
Username	Default value: An empty string. Valid values: A string that is your username for the inbound phone system.
Userpassword	Default value: An empty string. Valid values: A string that is your password for the inbound phone system.
TimeoutSeconds	Default value: 0 Valid values: A positive integer. The number of seconds that Syntelate XA will wait for a response from TSAPI for any command. We recommend using 10 seconds.
PrivateDataVersions	Default value: An empty string. Valid values: A string that defines the release version of the TSAPI interface.

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JSON Key	Description
	Required only if TSAPI is the inbound phone system.

3.7.4.2 CTI run options (JSON)

```
{
    /* Privacy option */
    "hidePhoneNumbers": true,

    /* Notification options */
    "ShowConsultNotificationMessage":"true",
    "ShowConsultToastMessage":"true",

    /* Call settings */
    "CallOptions": {
        "IsCopyToDB": true,
```

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```
        "DateFormat": "DD-MM-YYYY",
        "TimeFormat": "HH:MM:SS",
        "ResponseTimeout": 30,
        "BooleanTrue": true,
        "BooleanFalse": false,
        "OutboundGoReadyTimeoutSecs":15
    },

    /* Blend settings */
    "PassThru": {
        "GoReadyOptions": {
            "IncomingCallsAgentGroup": 0,
            "OutboundOnly": false,
            "OutboundOnlyAuxCode": 5,
```

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```
            "GoReadyWithManualIn": false,
            "SendNailupToastPopup": true
        },
        "CallOptions": {
            "ExtnLength": 5,
            "ExtnLengthComparison": ">",
            "ExternalPrefix": ""
        }
    },
    /* Wrap timer */
    "WrapTimer": {
        "Countdown": true,
        "CountdownTimeoutSecs": 15,
        "CountdownAddTimeCount": 1,
```

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```
        "CountdownAddTimeSecs": 5,
        "autoCompleteCode": "AUTOWRAP"
    },

    /* POM dialer options */
    "DialerOptions": {
        "InteractionLookup": true,
        "InteractionField": "LKTL_POMID",
        "DatasetField": "LKTL_POMID"
        }
}
```

Privacy Option

This is an optional setting.

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JSON	Description
hidePhoneNumbers	Default value: true Valid values: true | false Determines whether the phone number fields in the Callback and DNC dialogs display the POM attribute name, PHONE 1 instead of the caller's number.

Notification Options

These are optional settings.

JSON	Description
ShowConsultNotificationMessage	Default value: true Valid values: true | false Determines whether an agent will see a notification briefly appear in the Syntelate XA browser when a consult call is passed to them.
ShowConsultToastMessage	Default value: true Valid values: true | false Determines whether an agent will see a notification in the Windows task tray when a consult call is passed to them.

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JSON	Description
	Note: If using toast notifications, in the AppSettings.config of Syntelate XA set the following key to true: <add key="Notifications" value="true" />
SendNailupToastPopup	Default value: true Valid values: true | false Determines whether a notification will be displayed on the Syntelate XA Agent Desktop when a POM Nailup Call is passed to the agent.

Call Options

These are optional settings.

JSON	Description
IsCopyToDB	Default value: true Valid values: true | false Determines whether Syntelate XA will save the call details to its database.
DateFormat	Default value: An empty string. Valid values: A string; "DD-MM-YYYY"

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JSON	Description
	Defines the format for saving date information for an interaction record in Syntelate XA.
TimeFormat	Default value: An empty string. Valid values: A string; "HH:MM:SS" Defines the format for saving time information for an interaction record in Syntelate XA.
ResponseTimeout	Default value: 0 Valid values: A positive integer that represents a time in seconds. Defines when Syntelate XA will terminate an attempted call if there has been no answer.
BooleanTrue	Default value: true Valid values: true | a string | a positive integer We recommend using true.
BooleanFalse	Default value: false Valid values: false | a string | a positive integer We recommend using false.
OutboundGoReadyTimeoutSecs	Default value: 0 Valid values: A positive integer.

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JSON	Description
	Specifies how long (in seconds) agents need to be in a Waiting **CTI State** on inbound before they will be nailed up for POM outbound.

PassThru Options

The PassThru group of options are only required for POM blend implementations. A POM blend implementation is one that uses Syntelate XA as both the inbound and the outbound desktop. The PassThru group configures the inbound phone system.

> **Note:** PassThru is an abbreviation of **Pass through Telephony Server**.

PassThru contains two groups:

- GoReadyOptions
- CallOptions

Go Ready Options

JSON	Description
IncomingCallsAgentGroup	Default value: 0 Valid values: A positive integer. Defines the agent group number that will be set Ready for inbound calls. References the AgentGroupNo field of the AGENTGROUPS table. If you omit this setting, then all agents will be available for inbound calls (unless you also

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JSON	Description
	set OutboundOnly to true).
OutboundOnly	Default value: true Valid values: true | false Determines whether the workzone is outbound only. Set to true if the workzone uses just POM. Set to false if the workzone uses POM blended with TSAPI or TAPI.
OutboundOnlyAuxCode	Default value: 0 Valid values: A positive integer. Defines the Aux reason code that tells TSAPI the agent is busy handling calls and it should not pass the agent inbound calls. For use only when TSAPI is the inbound phone system in POM blend.
GoReadyWithManualIn	Default value: true Valid values: true | false Determines whether the agent needs to manually click Answer to pick up an inbound call. Set to false if inbound calls should be answered automatically. Exception: the settings of the agent's phone (their extension number) can override this.
SendNailupToastPopup	Default value: true Valid values: true | false

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JSON	Description
	Determines whether a toast notification is displayed to the agent when a nail-up call starts ringing.

Call Options

The CallOptions group for PassThru lets you configure the agent phone that handles inbound calls.

JSON	Description
ExtnLength	Default value: 0 Valid values: A positive integer. Defines the number of digits in internal agent phone extensions. If you have varying lengths of internal extension (for example, a mix of 4 digit and 5 digit extensions) then set this to the higher number (and set ExtnLengthComparison accordingly).
ExtnLengthComparison	Default value: An empty string. Valid values: An operator (such as "!=", ">", or ">="). Determines when ExternalPrefix is assigned to a phone number, based on ExtnLength. For example, if ExtnLength is 5 and ExtnLengthComparison is !=, then ExternalPrefix is assigned to any phone number with a length other than 5 (numbers with 4, 7 or 11 digits, and so on).
ExternalPrefix	Default value: Empty string.

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JSON	Description
	Valid values: A positive number. Defines the prefix Syntelate XA should use when dialing external numbers.

Wrap Timer Options

JSON	Description
Countdown	Default value: true Valid values: true | false Determines whether automatic wrap-up of calls is enabled. If true, calls are wrapped up when the countdown is complete. When true, Countdown is dependent on the other wrap timer options in this group.
CountdownTimeoutSecs	Default value: 0 Valid values: A positive integer. Defines the number of seconds that the wrap timer counts down from.
CountdownAddTimeCount	Default value: 0 Valid values: 0 | 1 (as integers, not strings) Determines whether the **+ ADD TIME** button is displayed on the Agent Desktop. 0 is false and 1 is true. If you set this to 1, then you need to include the option

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JSON	Description
	CountdownAddTimeSecs. See below.
CountdownAddTimeSecs	Default value: 0 Valid values: A positive integer that represents a time in seconds. Dependent on CountdownAddTimeCount. If you have set CountdownAddTimeCount to 1, then you need to include this option to specify how much time the +ADD TIME button adds to the timer. You can set it to 0 to force the wrap timer to count up rather than down.
autoCompleteCode	Default value: Empty string. Valid values: A string. We recommend "AUTOWRAP". Dependent on Countdown. If you set Countdown to true, when the timer reaches zero, the autoCompleteCode is stamped on the interaction record to log that it has been completed.

Dialer Options

DialerOptions are required settings. They enable POM to pop existing POM interaction records to the Syntelate XA Agent Desktop.

JSON	Description
InteractionLookup	Default value: true

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JSON	Description
	Valid values: true | false Determines whether Syntelate XA will search the INTERACTION_X table for a match on the POM interaction data. In other words, when true, Syntelate XA will look for an existing interaction record that matches a value in the POM dialer data. The DatasetField and InteractionField settings tell Syntelate XA which fields to search on.
DatasetField	Default value: An empty string. Valid values: A string that specifies a field in the dialer. Defines the POM dialer field that you want Syntelate XA to look for in the InteractionField in the INTERACTION_X table. Tip: You need to specify the same value for DatasetField and InteractionField to allow InteractionLookup to work.
InteractionField	Default value: An empty string. Valid values: A string that specifies a field in the INTERACTION_X table. We recommend: "LKTL_POMID". Defines the INTERACTION_X field that Syntelate XA will search to find a match on the DatasetField value. Tip: You need to specify the same value for InteractionField and DatasetField to allow InteractionLookup to work.

3.7.4.3 Not Ready Reasons

Not ready reasons are held in the CTINOTREADYREASONS database table.

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You can manage the not ready reasons either from the configuration desktop or directly in the database.

For guidance on using the configuration desktop to manage the not ready reasons, see the section 'Not Ready Reasons' in the PDF Guide, *Syntelate XA - Supervisor*.

If you prefer to use the database, ensure that you add a new record for each not ready reason. For guidance, see the PDF Guide *Syntelate XA - Database Tables*.

3.8 Email

Syntelate XA's email channel gives agents the ability to handle customer emails directly from their agent desktop.

An agent desktop can be set up for either basic email handling or advanced email handling.

Syntelate XA also supports automated emailing. See: Key Features.

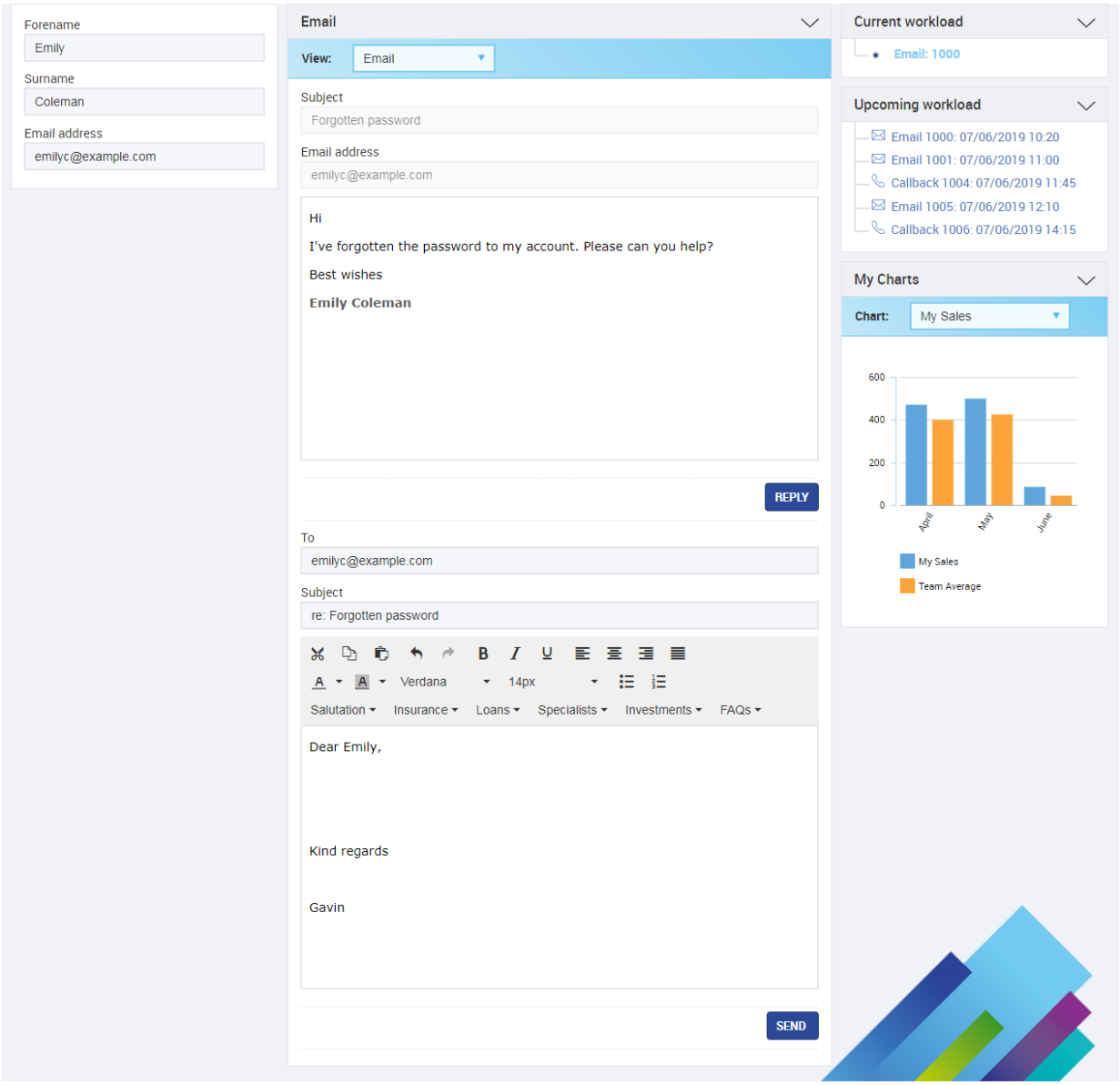
> **EXAMPLE**
>
> Inisoft Travel automatically send an email to the customer after each voice call, requesting that they complete a short survey about their experience.

3.8.1 Simple Email Handling

Where simple email handling is used, agents can reply to customer emails or create **unsolicited emails** (emails that are not sent in response to a customer email).

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Simple email handling is intended for contact centers where there is a one-to-one relationship between a customer email and an agent's reply.



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3.8.2 Advanced Email Handling

With an advanced email-handling setup, agents can forward and transfer emails, as well as access additional features when creating or replying to emails.

> **Note:** For general information and instructions on transferring emails, see the document *Syntelate XA - Handling Emails*.

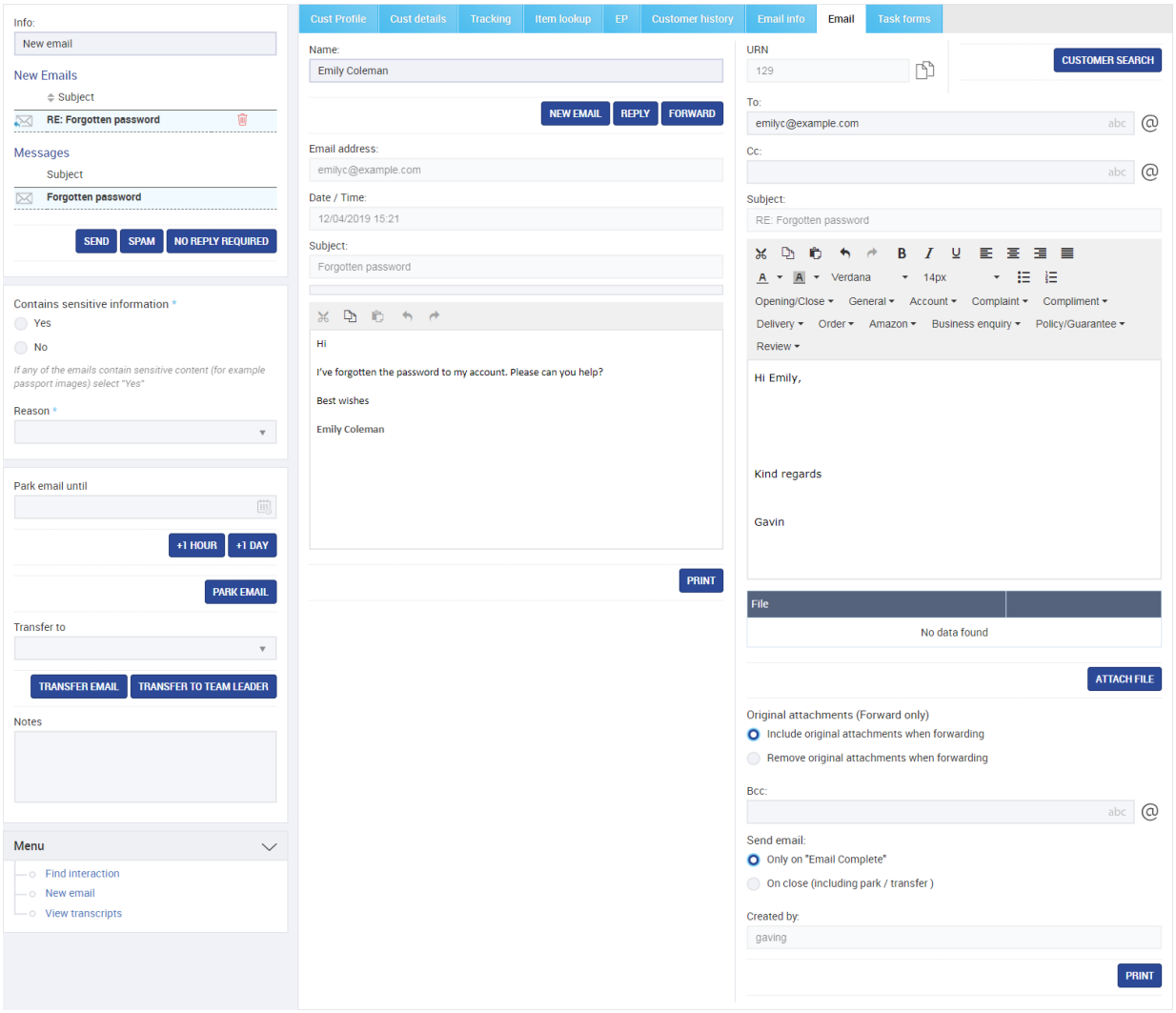
Unlike with simple email handling, many emails can be grouped into a single interaction record. For example, in response to a single customer email, an agent could:

- Reply to the email saying that they are going to pass the customer's query on to another department.
- Forward the email to another department.

Similarly, let's say a customer sends an email and then shortly thereafter sends a further email with additional details (such as "Forgot to add the attachment!"). With advanced email handling, these two emails would be presented to the agent at the same time.

The agent could view both emails and then decide to respond to just one or both of them.

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3.8.3 Key Features

Some of the key features of email support that are common to both simple email handling and advanced email handling are described below.

Note: For information about features specific to advanced email handling, see the document *Syntelate XA - Handling Emails*.

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3.8.3.1 Record Matching

When an agent opens a customer email in their unified agent desktop, Syntelate XA automatically matches upon the customer's email address and, for existing customers, retrieves the customer's full details.

This provides the agent with the necessary context to fully understand the customer's email. For example, a desktop can show the customer's full interaction history across all channels, allowing the agent to view previous emails with the customer, web chat transcripts, and so on.

3.8.3.2 HTML Emails

Agents can compose HTML emails to customers that include formatting such as bold, color, links and so on.

3.8.3.3 Snippets

Snippets are small chunks of content that an agent (or email rule) can insert into an email, such as a response to a common question or an email signature.

They help agents by removing the pressure of writing to customers. Instead of writing emails from scratch, agents use snippets as building blocks to compose an email quickly.

Snippets can include references to data. For example, an email signature snippet might include the agent's first name. When an agent called Jack, say, uses this snippet, the snippet would include the name Jack.

See the document *Syntelate XA - Snippet Editor* for more information.

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Tip: For guidance on how to insert snippets in automated email replies, see Email Rules in the Configuration Desktop section of *Syntelate XA - Supervisor*.

3.8.3.4 Rewriter

Agents can use Rewriter to paraphrase part or all of their email message before they send it.

See Using Rewriter to learn how an agent uses Rewriter.

3.8.3.5 Sentiment Analysis

The sentiment analysis feature is available as an add-on and is provided by Syntelate XA's **Sentiment Analysis** connector to the Azure OpenAI API.

Inbound Behavior

When enabled, sentiment analysis is performed automatically on all inbound emails prior to passing them to the agent desktop.

The analysis checks the language used in the message and scores it on sentiment quality, using a classification of positive, neutral or negative. The result is displayed in a sentiment rating bar that's displayed at the foot of the inbound email window.

Outbound Behavior

Sentiment analysis of outbound emails is not automatic but instead is done on demand.

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An agent can choose to submit their email draft for sentiment analysis before they send the email. They can do this by selecting the body of their draft email message and clicking the Sentiment button in the HTML Editor toolbar.

When an agent clicks the Sentiment button, the selected text will be analyzed and rated. Syntelate XA displays the sentiment rating in a dialog on the agent desktop. The agent can choose to dismiss the dialog and either send or edit the email.

If they choose to edit the email, they can use sentiment analysis again if they wish.

Configuration

If you add **Sentiment Analysis** to one of your channels, Inisoft Support will configure it for you.

When it is implemented, you have the ability to control whether **Sentiment Analysis** is on or off. You can switch **Sentiment Analysis** on and off using the `SentimentAnalysis` setting in the GENERAL table.

Availability

The AI features in Syntelate XA are powered by the Azure OpenAI API and are available individually as add-ons. See Channels on page 41the PDF Guide, 'Syntelate XA - Overview of Channels', for more information.

Agent Experience

For more information on the agent experience of **Sentiment Analysis**, see Email Sentiment Analysis.

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Sentiment Analysis Reporting

You can add a **Sentiment Analysis** report to your Syntelate XA Dashboard Desktop. With this report, supervisors can monitor the average sentiment ratings of customer interactions by channel. See 'Dashboard Desktop' in the PDF Guide, *Syntelate XA - Supervisor*.

3.8.3.6 Rewriter

Agents can use **Rewriter** to improve their email and chat messages. **Rewriter** is an AI-powered assistant in Syntelate XA that:

- Analyzes the agent's written content,
- Corrects any spelling, grammatical, and punctuation errors,
- Rewrites it in a formal style,
- And presents the agent with suggested replacements.

Configuration

If you add **Rewriter** to one of your channels, Inisoft Support will configure it for you.

When it is implemented, you have the ability to control whether **Rewriter** is on or off. You can switch **Rewriter** on and off using the `AIRewrite` setting in the GENERAL table.

Availability

The AI features in Syntelate XA are powered by the Azure OpenAI API and are available individually as add-ons. See Channels on page 41the PDF Guide, 'Syntelate XA -

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Overview of Channels', for more information.

Agent Experience

See Using Rewriter to understand how it works in practice for agents.

3.8.3.7 Outbound Email Options

Syntelate XA supports the following outbound email options as standard:

- New
- Reply
- Forward

On request, we can implement **Reply All**, too.

3.8.3.8 Mailboxes

You can monitor multiple email mailboxes, such as *personaltravel@inisoft.com* and *businesstravel@inisoft.com*. Emails to each email address can be assigned to a specific agent group.

Agents' replies are sent from the appropriate email address.

> **EXAMPLE**
>
> Inisoft Travel have an agent group for Personal Travel and another agent group for Business Travel. They configure the *personaltravel@inisoft.com* email address to

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use the Personal Travel agent group and the *businesstravel@inisoft.com* email address to use the Business Travel agent group.

This ensures that emails are always passed to an agent who has been appropriately trained to answer it.

3.8.3.9 Read Receipts

Read receipts are an optional feature of Syntelate XA for Microsoft Exchange mailboxes.

When the read receipt feature is enabled, a **Read receipt** check box is displayed on the agent desktop. Agents can request a read receipt for an outbound email by selecting that check box.

If you would like to enable read receipts on your Microsoft Exchange email channel, contact your Inisoft professional services consultant to discuss your requirements.

3.8.3.10 Workload

Emails that Syntelate XA assigns to an agent are put into that agent's workload. The agent can then freely work through emails in their workload in the order that they see fit. For example, an agent may wish to first quickly reply to all "easy" emails before then returning to "harder" emails.

An agent can start to compose a reply and then return to it later. In addition, where you blend different types of activity, an agent working on an email can be interrupted by an inbound call.

To move between items in their workload, agents use a workload control on their desktop.

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3.8.3.11 Route to Supervisor for Approval

Syntelate XA lets you route an agent's email to a supervisor for approval before actually sending the email to the customer.

Maybe you only wish to do this for certain agents, such as newly trained agents. Or perhaps you only wish to do this where the agent has manually edited the email but not where the email consists only of snippets.

With Syntelate XA, this is all possible.

> **Note:** To route all emails by a particular agent to a supervisor before sending, populate the EMAILESCALATE_GRP field in the AGENT table. This should reference an agent group of supervisors.
>
> To query whether an email was manually edited by the agent or solely built up using snippets, use the LKTL_MANUALLYEDITED field in the INTERACTION_X_NEWMESSAGE table.

3.8.3.12 Attachments

Syntelate XA supports email attachments, allowing agents – right from their agent desktop – to view any photographs or documents that a customer has attached to an email. Syntelate XA also lets agents attach files to outbound emails.

For Office 365 integrations, the maximum file size for attachments in an outbound email is 15 MB.

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3.8.3.13 Change Priority over Time

You can change the prioritization of emails over time. This is achieved via the Fulfilment Server.

> **EXAMPLE**
>
> Inisoft Travel have configured Syntelate XA so that, when an email first comes in, Syntelate XA marks it as low priority. After 24 hours, if an agent has not replied to the email, Syntelate XA increases its priority. After 48 hours, if the email has still not been responded to, Syntelate XA sets its priority to priority 1.

3.8.3.14 Supported Email Providers

Syntelate XA currently integrates with the following email providers:

- Microsoft Exchange
- Microsoft Office 365
- Gmail
- Any provider that offers SMTP

The following email functionality is supported:

Functionality	Exchange	Office 365	Gmail	SMTP
Inbound messages	x	x		
Outbound messages	x	x	x	x

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Functionality	Exchange	Office 365	Gmail	SMTP
Booking appointments	x	x	x	x
Syntelate Studio compatibility	x	x*	x*	x*

* Requires additional information from the email account holder to be compatible with Syntelate Studio.

Note: You can easily configure an integration with Microsoft Exchange or Microsoft 365 in Syntelate XA by using the Message Gateway configuration tool. See Syntelate XA - Message Gateway Configuration. To discuss how to use other email services, contactInisoft Support.

3.8.4 Technical Details

An inbound email from a customer adds a record to the INTERACTION_X table, as with all other types of interaction. This is then picked up by the Worklist Engine and assigned to an agent.

For outbound email, you simply need to add a new record to the INTERACTION_X_NEWMESSAGE table. This is then picked up the Outbound Gateway service and sent to the customer.

You can add new records to the INTERACTION_X_NEWMESSAGE table in a variety of ways. For example:

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- You can add an email control to your agents' desktop that writes to the INTERACTION_X_NEWMESSAGE table.
- You can add an action to a completion button that writes to the INTERACTION_X_NEWMESSAGE table.
- You can set up a fulfilment that runs at set intervals and, where certain conditions are met, adds new records to the INTERACTION_X_NEWMESSAGE table.

3.8.5 Settings

Advanced configuration options for emails are held in app settings files.

It is in the app settings that you, for example, configure the file name extensions to allow for email attachments. If a customer tries to send a file that is not in the permitted list, it will not be saved and your agents will not be able to view it.

3.8.6 More Information

Document	Description
Syntelate XA - Designer	Explains how to design desktops for your agents.
Syntelate XA - Message Gateway Configuration	Explains how to configure the monitoring of mailboxes. Monitored mailboxes can also be used to send outbound emails.
Syntelate XA - Supervisor	Explains how to set up email rules.

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Document	Description
Syntelate XA - Snippet Editor	Explains how to configure snippets for email.
Syntelate XA - Fulfilment Server	Explains how to set up fulfilments, which you can use for automated email communication.

3.9 Facebook

With Syntelate XA's Facebook integration, customers can send your agents chat messages in Facebook Messenger ("Messenger").

3.9.1 Agent Experience

Agents will see Facebook chats on their Syntelate XA Agent Desktop.

Their messages are sent to Messenger.

3.9.2 Customer Experience

A Facebook chat begins when a customer sends a message in Messenger on a monitored Facebook page or in the Messenger app.

3.9.3 Features

Some of the key features of Facebook chat in Syntelate XA are described below.

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3.9.3.1 Sentiment Analysis

Sentiment Analysis helps agents create a positive experience for customers. When **Sentiment Analysis** is enabled, Syntelate XA displays a sentiment rating for each inbound and outbound chat message. Possible ratings are positive, neutral or negative. The customer does not see the sentiment ratings. Only the agent can see them.

Configuration

If you add Sentiment Analysis to one of your channels, Inisoft Support will configure it for you.

When it is implemented, you have the ability to control whether Sentiment Analysis is on or off. You can switch Sentiment Analysis on and off using the SentimentAnalysis setting in the GENERAL table.

Availability

The AI features in Syntelate XA are powered by the Azure OpenAI API and are available individually as add-ons. See Channels on page 41the PDF Guide, 'Syntelate XA - Overview of Channels', for more information.

Agent Experience

For more information on the agent experience of **Sentiment Analysis**, see Handling Chats.

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Sentiment Analysis Reporting

You can add a **Sentiment Analysis** report to your Syntelate XA Dashboard Desktop. With this report, supervisors can monitor the average sentiment ratings of customer interactions by channel. See 'Dashboard Desktop' in the PDF Guide, *Syntelate XA - Supervisor*.

3.9.3.2 Smart Text

Smart text is text that an agent can quickly insert into a chat, for example *Hi, [CONTACT.FORENAME]. I can help you with that.*

Smart text can include references to data. For example, when an agent sends the above smart text, [CONTACT.FORENAME] would be replaced with the customer's first name: *Hi, Emily. I can help you with that.*

3.9.3.3 Multiple Facebook Pages

You can monitor multiple Facebook pages, such as Inisoft Travel Personal and Inisoft Travel Business. You can associate each Facebook page with a different agent group.

> **Note:** When a user comments on a Facebook page, Facebook assigns them a unique ID *for that page*.
>
> Because of this, if you wish to support multiple Facebook pages, you must store (or at least be able to store) multiple Facebook IDs per customer. For more information, see document *Syntelate XA - Message Gateway Configuration*.

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3.9.3.4 Transfer

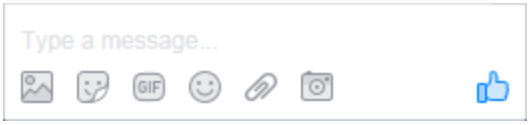
Agents can transfer a Facebook chat. Syntelate XA will then pass the chat to another agent who is assigned to the same Facebook page.

3.9.3.5 Handle Multiple Chats

Agents can handle multiple chats at a time – you can choose how many. This can even be multichannel: Facebook, web, SMS, and other social media chats.

3.9.3.6 Attachments and Embedded Media

Facebook Messenger lets your customers send the following content to your agents:



- Photos
- Stickers
- Animated GIFs
- Emojis
- Files
- Likes

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Note: Syntelate XA does not let agents send your customers any photos or other types of multimedia.

3.9.4 Integration

To use Facebook with Syntelate XA, your company needs its own Syntelate XA Facebook app and then needs to create a social media message gateway in Syntelate XA. See the document *Syntelate XA - Message Gateway Configuration*.

3.9.5 More Information

Document	Description
Syntelate XA - Handling Chats	Explains how chat (which includes web chat, SMS chat, and social media chat) works from an agent's point of view.
Syntelate XA - Designer	Explains how to design desktops for your agents. To let your agents handle chats, add a chat to the desktop.
Syntelate XA - Smart Text Editor	Explains how to configure smart text for chat.

3.10 Outbound SMS

Syntelate XA's outbound SMS functionality lets you send SMS text messages to your customers. This can either be via automated communication or by the agent manually sending an SMS.

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- **Automated communication:** Perhaps you'd like to ask each customer about their experience after a voice call. Or maybe your agents book appointments for your customers, and you'd like to send a reminder SMS to the customer 24 hours before their appointment.
- **Manual communication:** Let an agent send an SMS to a customer while on a call with them to provide written confirmation of some details, for example. The content of such SMS messages can be automatically generated and sent upon the click of a button. Alternatively, you can allow the agent to manually type the SMS.

3.10.1 Outbound SMS vs SMS Chat

Syntelate XA offers two types of SMS functionality.

3.10.1.1 Outbound SMS

Allows outbound SMS communication to the customer, either by automated communication or by the agent manually sending an SMS.

3.10.1.2 SMS Chat

Allows back-and-forth chat between an agent and a customer via SMS. Initiated by the customer sending an SMS.

For more information about SMS chat, see SMS Chat on page 158.

3.10.2 Integration Services

Syntelate XA supports the following integration services for outbound SMS:

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- Kapow
- Textlocal
- Avaya OneCloud CPaaS

See the service provider's website for details of costs.

> **Note:** Syntelate XA can integrate with other SMS service providers, too. To discuss this, please contact Support and TrainingInisoft Support.

3.10.3 Technical Details

To send an outbound SMS message, you simply need to add a new record to the INTERACTION_X_NEWMESSAGE table. This is then picked up the Outbound Gateway service and sent to the customer.

You can add new records to the INTERACTION_X_NEWMESSAGE table in a variety of ways. For example:

- You can add a multiline text box to your agents' desktop that writes to the INTERACTION_X_NEWMESSAGE table.
- You can add an action to a completion button that writes to the INTERACTION_X_NEWMESSAGE table.
- You can set up a fulfilment that runs at set intervals and, where certain conditions are met, adds new records to the INTERACTION_X_NEWMESSAGE table.

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3.10.4 More Information

Document	Description
Syntelate XA - Designer	Explains how to design desktops for your agents. To let your agents send SMS messages at the click of a button, add an action button action button to a data entry element. To let your agents type SMS messages, add a multiline text boxmultiline text box. To automatically send an SMS at the end of a call, add an action to a completion button.
Syntelate XA - Message Gateway Configuration	Explains how to configure a message gateway with an SMS service provider for the sending of outbound SMS messages.
Syntelate XA - Fulfilment Server	Explains how to set up fulfilments, which you can use for automated SMS communication.

3.11 SMS Chat

Syntelate XA's SMS chat functionality lets customers communicate with an agent via an exchange of SMS text messages.

An SMS chat begins when a customer texts a phone number that is monitored by Syntelate XA.

For agents, SMS chats take place in Syntelate XA. Agents' messages are sent as SMS messages from the company's monitored phone number.

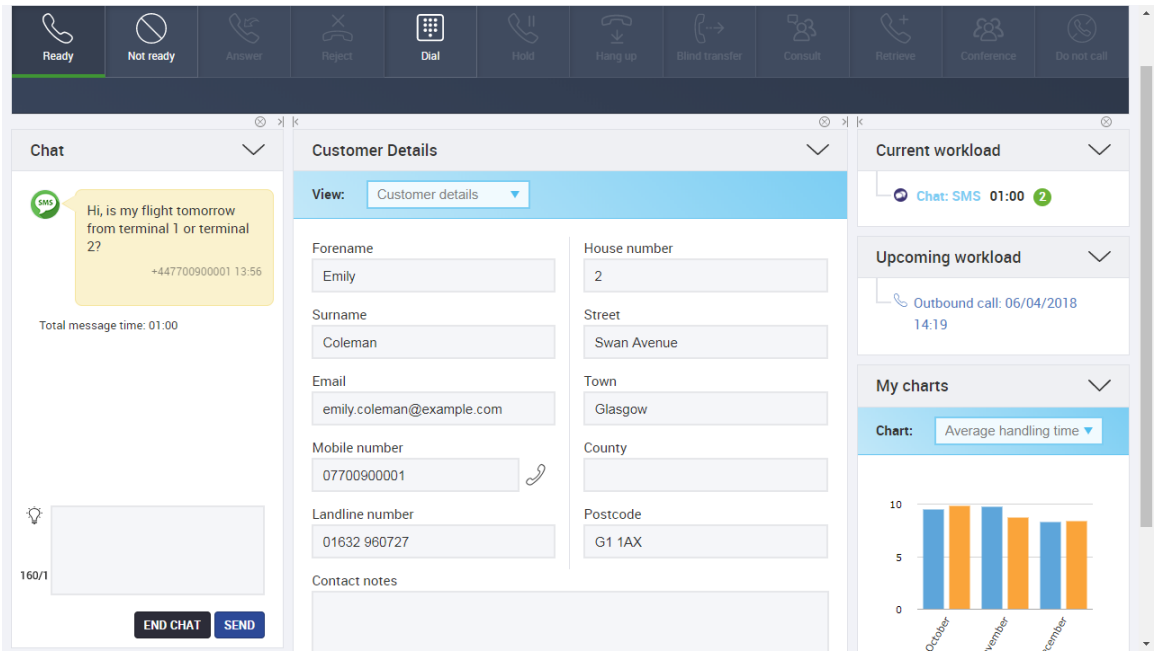
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EXAMPLE

Customers can contact Inisoft Travel by sending SMS text messages from their cell phone.

Emily has an inquiry, so on her cell phone she sends the following message to Inisoft Travel: *Hi, is my flight tomorrow from terminal 1 or terminal 2?*

For Jack, an agent, the SMS chat opens in Syntelate XA.



Because Emily's phone number matches an existing customer record, her details are automatically shown. Jack looks into Emily's record to find information about her next flight and then types his response. This response is sent back to Emily via SMS.

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Any further messages sent by Emily appear on Jack's desktop in the same SMS chat.

3.11.1 Features

Some of the key features of SMS chat are described below.

3.11.1.1 Rewriter

Agents can use **Rewriter** to improve their email and chat messages. **Rewriter** is an AI-powered assistant in Syntelate XA that:

- Analyzes the agent's written content,
- Corrects any spelling, grammatical, and punctuation errors,
- Rewrites it in a formal style,
- And presents the agent with suggested replacements.

Configuration

If you add **Rewriter** to one of your channels, Inisoft Support will configure it for you.

When it is implemented, you have the ability to control whether **Rewriter** is on or off. You can switch **Rewriter** on and off using the AIRewrite setting in the GENERAL table.

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Availability

The AI features in Syntelate XA are powered by the Azure OpenAI API and are available individually as add-ons. See Channels on page 41the PDF Guide, 'Syntelate XA - Overview of Channels', for more information.

Agent Experience

See Using Rewriter to understand how it works in practice for agents.

3.11.1.2 Smart Text

Smart text is text that an agent can quickly insert into a chat, for example *Hi, [CONTACT.FORENAME]. I can help you with that.*

Smart text can include references to data. For example, when an agent sends the above smart text, [CONTACT.FORENAME] would be replaced with the customer's first name: *Hi, Emily. I can help you with that.*

3.11.1.3 Phone Numbers

You can monitor multiple phone numbers and associate each phone number with a different agent group. You can then direct customers to text a particular phone number for a particular type of query. For example:

Query Type	Phone Number
Personal Travel	07700900050
Business Travel	07700900060

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3.11.1.4 Handle Multiple Chats

Agents can handle multiple chats at a time – you can choose how many. This can even be a mix of SMS, web, and social media chats.

3.11.2 SMS Chat vs Outbound SMS

Syntelate XA offers two types of SMS functionality.

3.11.2.1 SMS Chat

Allows back-and-forth chat between an agent and a customer via SMS. Initiated by the customer sending an SMS.

3.11.2.2 Outbound SMS

Allows outbound communication to the customer, either by automated communication or by the agent manually sending a message.

For more information about outbound SMS, see Outbound SMS on page 155.

3.11.3 SMS Costs

Syntelate XA integrates with third-party APIs for SMS chat, which means that you need to open an account with a third-party SMS provider to implement SMS chat. Check with your chosen provider to find out their costs for sending and receiving SMS.

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3.11.4 Settings

Various general settings are relevant to SMS chat. See the GENERAL database table.

In particular, you must set the **PhoneNumberMatching** general setting with the telephone dialing prefixes that Syntelate XA should take into account for phone number matching.

EXAMPLE

Emily's cell phone number is 07700900001. Emily lives in the United Kingdom, where the country calling code is +44.

For the **PhoneNumberMatching** general setting, Inisoft Travel have specified **44,+44**.

This setting ensures that when Emily gets in touch by SMS, Syntelate XA can match her phone number against the number in Emily's contact record. In other words, Syntelate XA would consider +447700900001 and 07700900001 to be a match.

Some advanced configuration options for SMS chat are held in app settings files.

3.11.5 More Information

Document	Description
Syntelate XA - Handling Chats	Explains how chat (which includes web chat, SMS chat, and social media chat) works from an agent's point of view.
Syntelate XA - Designer	Explains how to design desktops for your agents. To let your

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Document	Description
	agents handle chats, add a chat control to the desktop.
Syntelate XA - Message Gateway Configuration	Explains how to configure the phone numbers that you monitor and that agents can use to send texts.
Syntelate XA - Smart Text Editor	Explains how to configure smart text for chat.

3.12 Web Chat

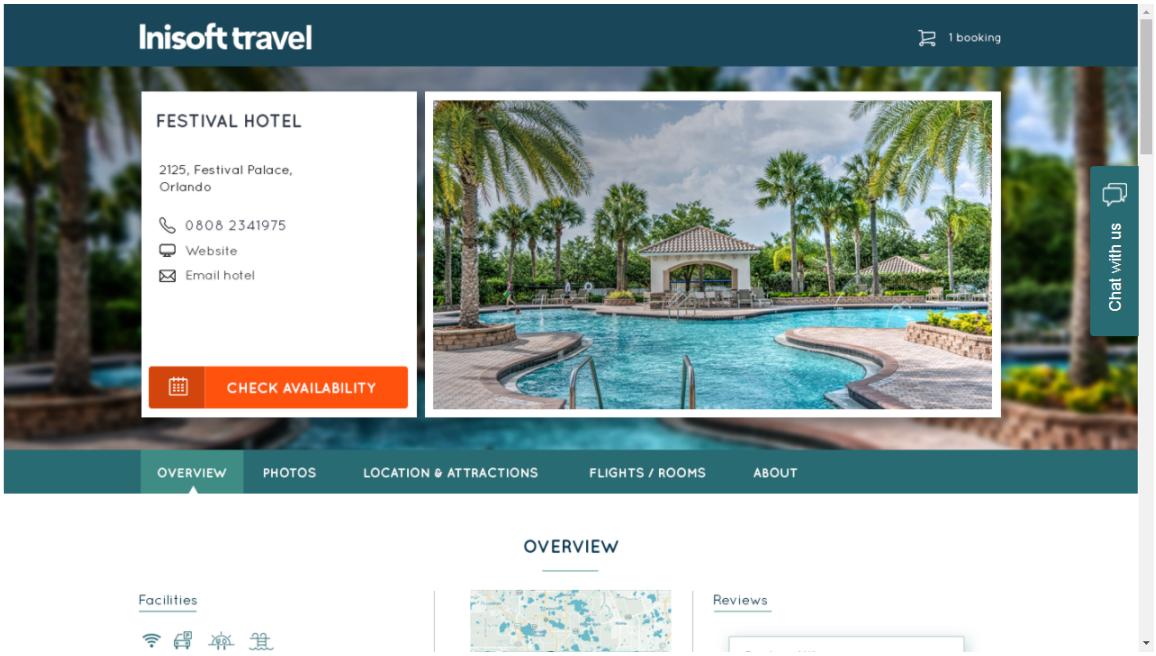
Syntelate XA's web chat functionality lets customers communicate with an agent via a web chat widget on your website. A web chat takes the form of an exchange of instant messages.

For agents, chats take place in Syntelate XA.

EXAMPLE

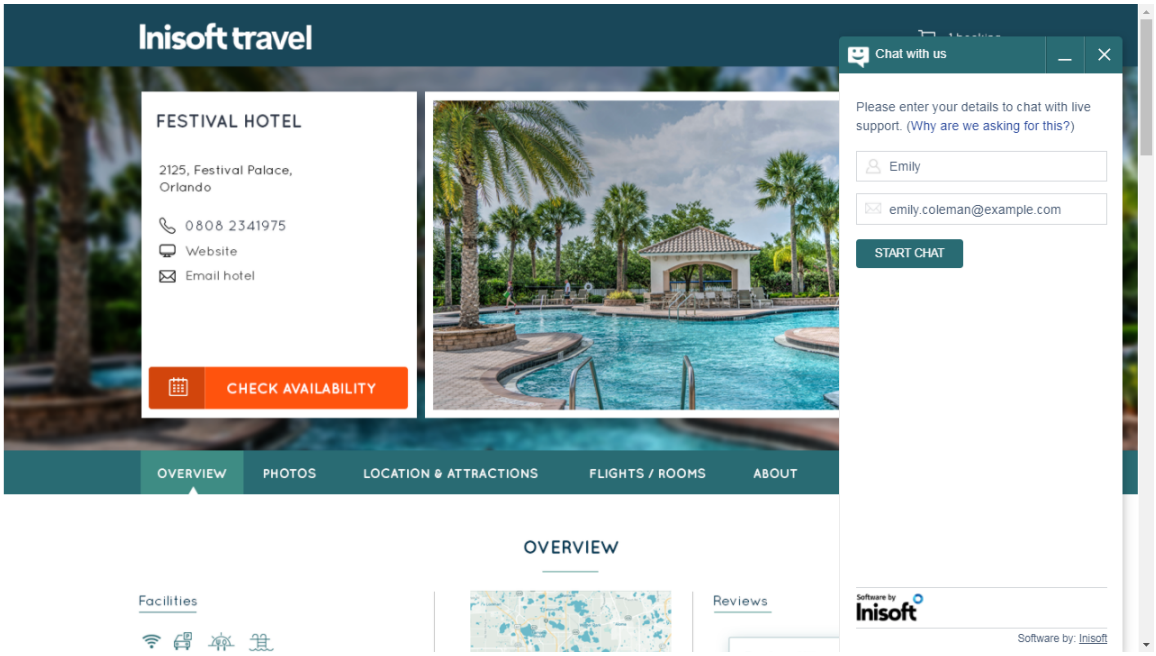
Emily is on the Inisoft Travel website.

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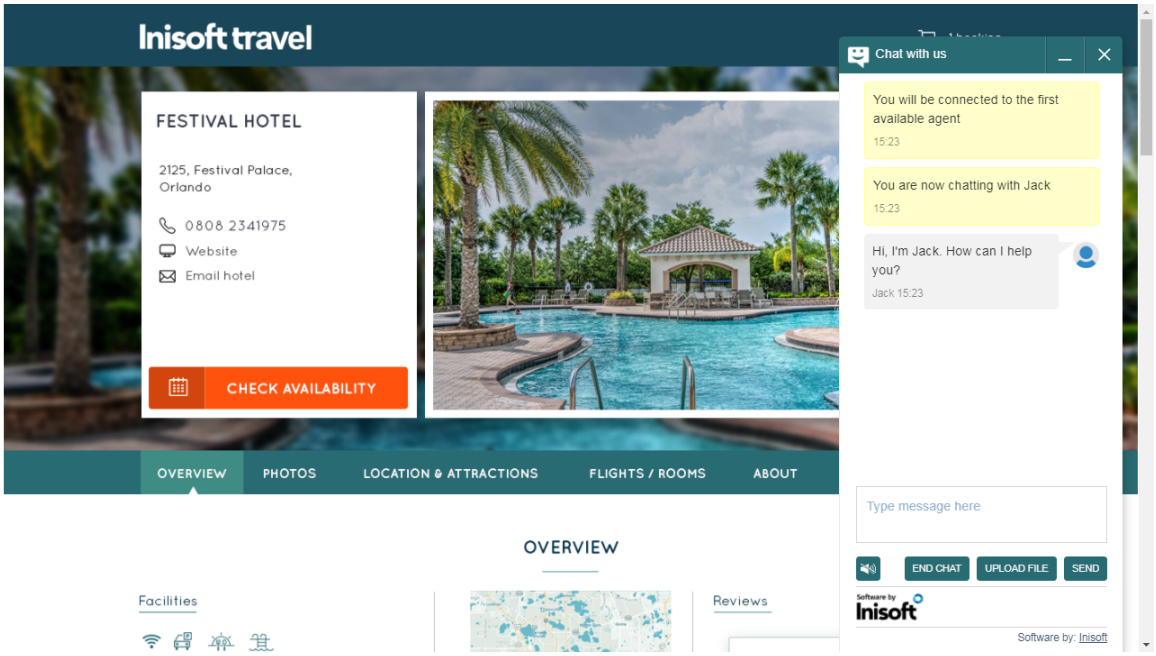
Emily would like to ask a question about a holiday she has booked, so she clicks **Chat with us**. She is asked to enter some basic personal details.

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After entering these details and clicking **START CHAT**, Emily is connected to an agent: Jack.

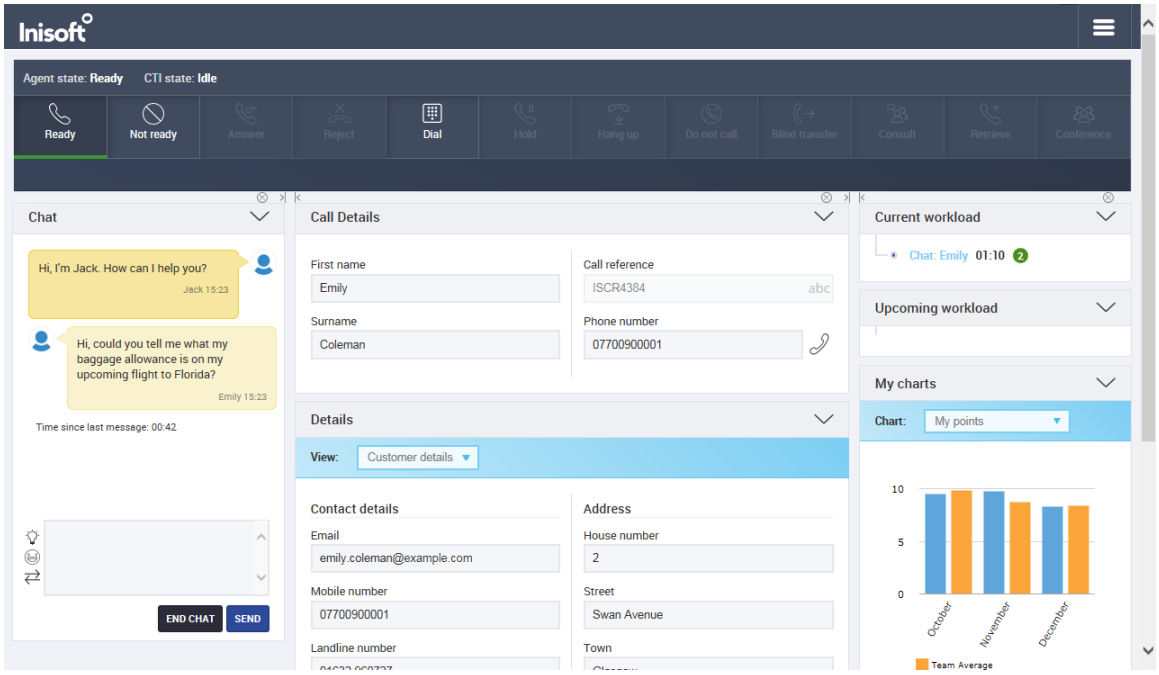
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Emily types her question in the text box and clicks **SEND**.

For Jack, the web chat opens in Syntelate XA.

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Because Emily's email address matches an existing customer record, her details are shown.

3.12.1 Features

Some of the key features of web chat are described below.

3.12.1.1 Sentiment Analysis

Sentiment Analysis helps agents create a positive experience for customers. When **Sentiment Analysis** is enabled, Syntelate XA displays a sentiment rating for each inbound and outbound chat message. Possible ratings are positive, neutral or negative. The customer does not see the sentiment ratings. Only the agent can see them.

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Configuration

If you add **Sentiment Analysis** to one of your channels, Inisoft Support will configure it for you.

When it is implemented, you have the ability to control whether Sentiment Analysis is on or off. You can switch **Sentiment Analysis** on and off using the SentimentAnalysis setting in the GENERAL table.

Availability

The AI features in Syntelate XA are powered by the Azure OpenAI API and are available individually as add-ons. See Channels on page 41the PDF Guide, 'Syntelate XA - Overview of Channels', for more information.

Agent Experience

For more information on the agent experience of **Sentiment Analysis**, see Handling Chats.

Sentiment Analysis Reporting

You can add a **Sentiment Analysis** report to your Syntelate XA Dashboard Desktop. With this report, supervisors can monitor the average sentiment ratings of customer interactions by channel. See 'Dashboard Desktop' in the PDF Guide, *Syntelate XA - Supervisor*.

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3.12.1.2 Rewriter

Agents can use **Rewriter** to improve their email and chat messages. **Rewriter** is an AI-powered assistant in Syntelate XA that:

- Analyzes the agent's written content,
- Corrects any spelling, grammatical, and punctuation errors,
- Rewrites it in a formal style,
- And presents the agent with suggested replacements.

Configuration

If you add **Rewriter** to one of your channels, Inisoft Support will configure it for you.

When it is implemented, you have the ability to control whether **Rewriter** is on or off. You can switch **Rewriter** on and off using the `AIRewrite` setting in the GENERAL table.

Availability

The AI features in Syntelate XA are powered by the Azure OpenAI API and are available individually as add-ons. See Channels on page 41the PDF Guide, 'Syntelate XA - Overview of Channels', for more information.

Agent Experience

See Using Rewriter to understand how it works in practice for agents.

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3.12.1.3 Smart Text

Smart text is text that an agent can quickly insert into a chat, for example *Hi, [CONTACT.FORENAME]. I can help you with that.*

Smart text can include references to data. For example, when an agent sends the above smart text, [CONTACT.FORENAME] would be replaced with the customer's first name: *Hi, Emily. I can help you with that.*

3.12.1.4 Auto-responses

In web chats, an auto-response is a message that a chat can automatically send to the customer when specific events occur. For example, when either the agent or the customer has not sent a message for a while:

- *I haven't heard from you for a while. Are you still there?*
- *Sorry for the delay. I'll get back to you soon.*

The content and settings of auto-responses are configured in the **Message Gateway** tile of Syntelate Studio. You can find instructions in the Setting the Chat Messages topic of the Configuration document.

3.12.1.5 Surveys

Pre-chat surveys are questions that can be sent to customers before they are connected to a chat agent.

Post-chat surveys tailored to the selected topic can be sent after the chat has ended.

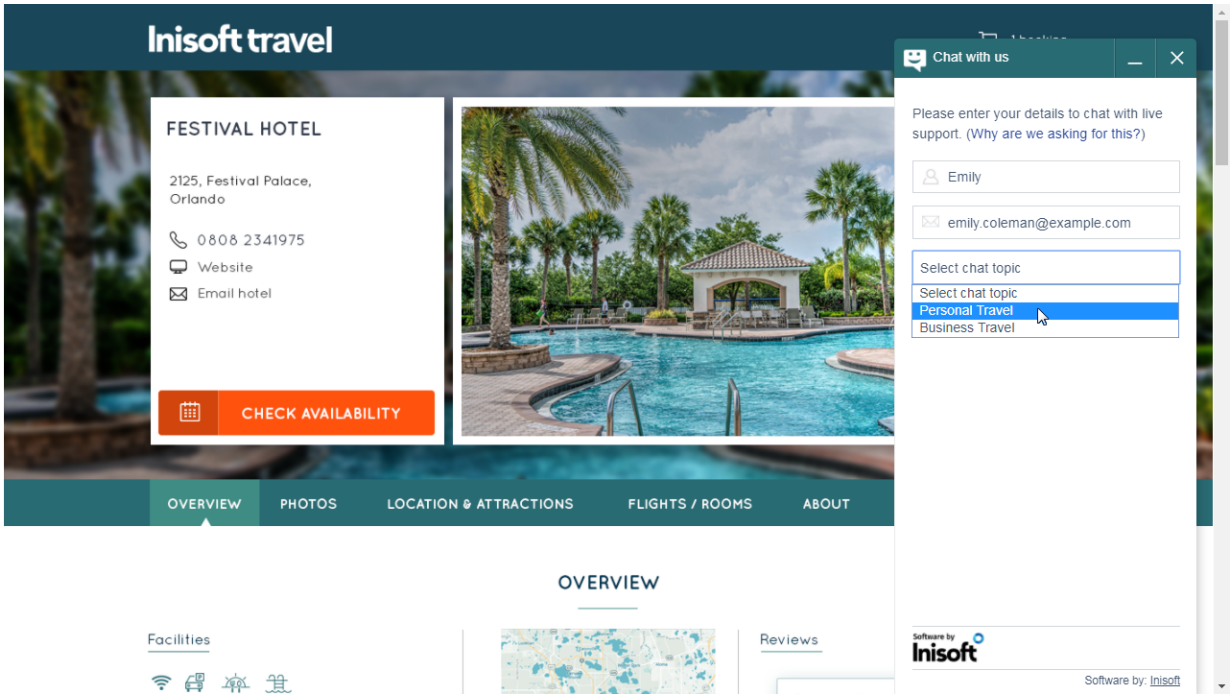
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The content of surveys is configured during the requirements gathering stage. If you need to make any changes to your surveys, contact Inisoft Support (+44 (0)800 668 1290, support@inisoft.com).

3.12.1.6 Topics

You can define different topics, such as *Personal Travel* and *Business Travel*. You can then associate each topic with a different agent group.

You can allow the customer to select the topic when they start a web chat:



Alternatively, you can automatically set the topic based on the web page from which the customer starts the chat. For example, if a customer starts a web chat from *www.inisoft.com/business*, you could automatically set the topic to Business Travel.

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3.12.1.7 Transfer

Agents can transfer a web chat from one topic to another.

Agents can also transfer the web chat to another agent who deals with the same topic. They might need to do this, say, if the customer has a second question that they can't help with.

> **Note:** See the document *Syntelate XA - Handling Chats*.

3.12.1.8 Handle Multiple Chats

Agents can handle multiple chats at a time – you can choose how many. This can even be a mix of web, SMS, and social media chats.

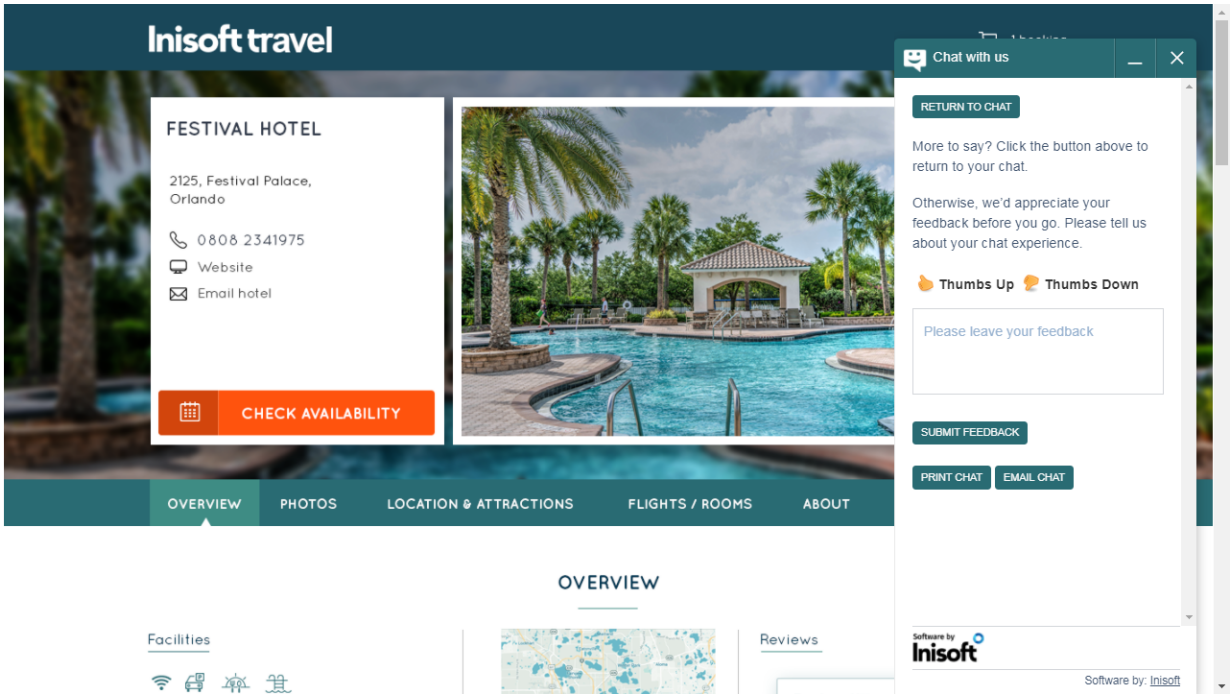
3.12.1.9 Attachments

Agents and customers can upload files to be attached to a current chat conversation. For example, they could upload a photograph or a scanned document.

3.12.1.10 Customer Feedback

At the end of a web chat, customers can leave feedback:

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You can choose to use either thumbs up / thumbs down or a 1 to 5 star rating.

All customer feedback is written to the INTERACTION_X_FEEDBACK database table.

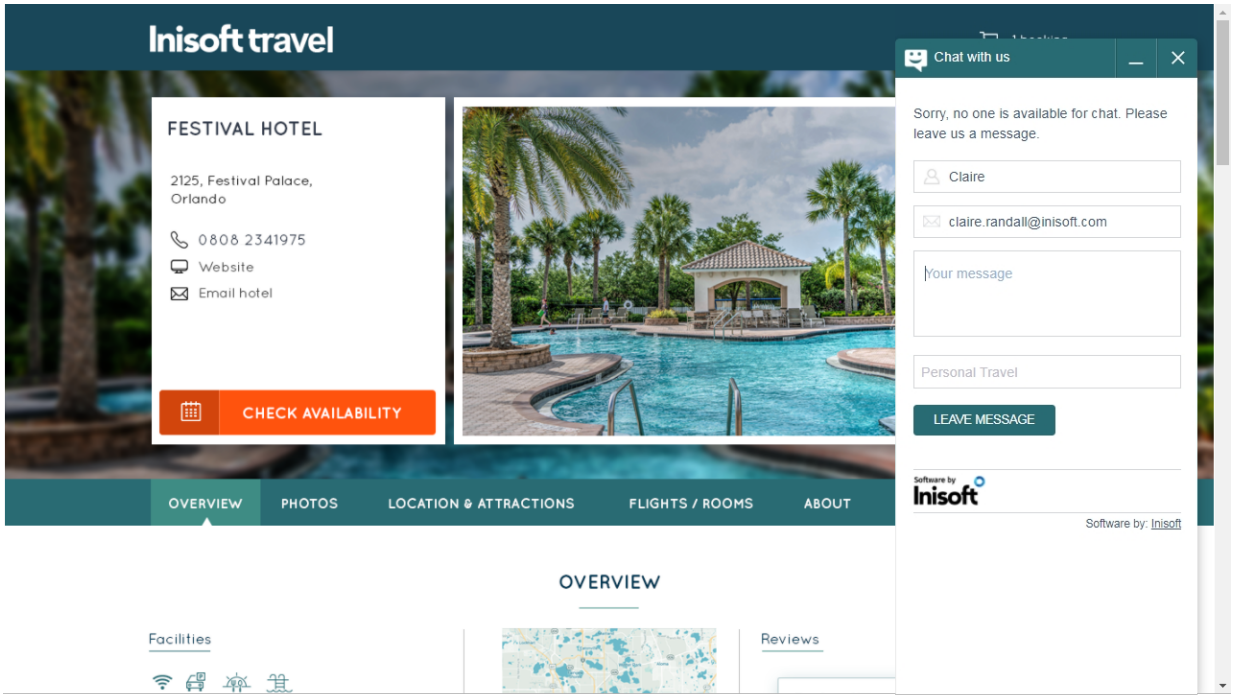
3.12.1.11 Email Transcript

The customer can choose to be emailed the web chat transcript. The agent can also select for this to happen.

3.12.1.12 Leave a Message

When no agents are available for web chat, a customer can instead leave a message:

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3.12.1.13 Customizable Widget

You can fully customize the web chat widget, including:

- Setting the colors and logos that it uses
- Defining the days and times that it is visible on your website

3.12.2 Settings

Various general settings are relevant to web chat. See the GENERAL database table.

Some advanced configuration options for web chat are held in app settings files.

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3.12.3 More Information

Document	Description
Syntelate XA - Handling Chats	Explains how chat (which includes web chat, SMS chat, and social media chat) works from an agent's point of view.
Syntelate XA - Designer	Explains how to design desktops for your agents. To let your agents handle chats, add a chat control to the desktop.
Syntelate XA - Message Gateway Configuration	Explains how to configure web chat topics and leave a message gateways.
Syntelate XA - Smart Text Editor	Explains how to configure smart text for chat.
Syntelate XA - Web Chat Configuration	Explains how to configure the web chat widget for your company's website.

3.13 WhatsApp

WhatsApp is owned by Meta. To enable a WhatsApp channel in Syntelate XA, we support integrations with Meta's approved third-party solution providers. The third party's API provides the interface between Syntelate XA and the WhatsApp Business API.

Syntelate XA's WhatsApp channel works in the same way as Messenger, SMS chat, and web chat.

This document describes the key features of a WhatsApp channel in Syntelate XA.

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3.13.1 Agent Experience

Agents receive and reply to WhatsApp messages using the **Chat** element on the Syntelate XA Agent Desktop.

Syntelate XA pops customer WhatsApp messages to the agent desktop when a customer sends a message to your business's WhatsApp number.

3.13.2 Customer Experience

Customers can have WhatsApp conversations with your business wherever they use WhatsApp. This might be a widget on your business's website, on Web WhatsApp in their browser, or on the WhatsApp app installed on their device.

3.13.3 Features

Some of the key features of WhatsApp chat in Syntelate XA are described below.

3.13.3.1 Rewriter

Agents can use **Rewriter** to improve their email and chat messages. **Rewriter** is an AI-powered assistant in Syntelate XA that:

- Analyzes the agent's written content,
- Corrects any spelling, grammatical, and punctuation errors,
- Rewrites it in a formal style,

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- And presents the agent with suggested replacements.

Configuration

If you add **Rewriter** to one of your channels, Inisoft Support will configure it for you.

When it is implemented, you have the ability to control whether **Rewriter** is on or off. You can switch **Rewriter** on and off using the AIRewrite setting in the GENERAL table.

Availability

The AI features in Syntelate XA are powered by the Azure OpenAI API and are available individually as add-ons. See Channels on page 41the PDF Guide, 'Syntelate XA - Overview of Channels', for more information.

Agent Experience

See Using Rewriter to understand how it works in practice for agents.

3.13.3.2 Smart Text

Smart text is text that an agent can quickly insert into a chat, for example *Hi, [CONTACT.FORENAME]. I can help you with that.*

Smart text can include references to data. For example, when an agent sends the above smart text, [CONTACT.FORENAME] would be replaced with the customer's first name: *Hi, Emily. I can help you with that.*

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3.13.3.3 Transfer

Agents can transfer a WhatsApp chat. Syntelate XA will then pass the chat to another agent.

3.13.3.4 Handle Multiple Chats

Agents can handle multiple chats at a time – you can choose how many. This can even be omnichannel: WhatsApp, web, SMS, and other social messaging chats.

3.13.3.5 Attachments and Embedded Media

WhatsApp lets your customers send the following content to your agents:

- Photos
- Stickers
- Animated GIFs
- Emojis
- Files

> **Note:** Syntelate XA does not let agents send photos or other types of multimedia.

3.13.4 Conversations on WhatsApp

When you set up a WhatsApp channel in Syntelate XA, you'll be able to receive user-initiated messages and send replies. Your replies need to be sent within 24 hours of

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receiving the user-initiated message. These types of conversation are categorized by WhatsApp as service conversations.

Syntelate XA currently does not support business-initiated conversations. These types of conversation are categorized by WhatsApp as authentication, marketing, or utility conversations. Business-initiated conversations require you to use WhatsApp message templates.

> **Note:** If you would like to send business-initiated WhatsApp messages, contact our Syntelate XA Product Support team to discuss your requirements. You can reach Product Support at support@inisoft.com or +44 (0)800 668 1290.

For more information about WhatsApp's conversation categories, refer to the Meta Developer documentation of the WhatsApp Business Platform.

3.13.4.1 Expiring Messages

WhatsApp restricts the period within which a business can respond to user-initiated messages. WhatsApp refers to this time period as the customer service window, and it's set at 24 hours. The window is opened when a customer's initial WhatsApp message is sent to your WhatsApp number. If the window closes before an agent in Syntelate XA has replied, then the customer's message will expire. To learn more about the consequences of the customer service window for expired user-initiated messages, see Meta's Policy Requirements paragraph.

The following features help your operations team manage expired messages in Syntelate XA.

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Reduce the Window

We recommend that you reduce the customer service window in Syntelate XA to avoid failed deliveries of agent replies. You can reduce the customer service window by setting a message expiry time in Syntelate Studio when you create your WhatsApp message gateway. For guidance, see the topic, 'Message Gateways Configuration' in the document *Syntelate XA - Studio*.

Remove Expired Messages

Syntelate XA can be configured to automatically remove expired WhatsApp messages from the Syntelate XA queue. That way, agents are never passed an expired message. Although the message is removed from the queue, it remains in Syntelate XA. To allow you to view and manage expired messages, use the **Expired Messages** pane on the Syntelate XA Configuration Desktop. See the document *Syntelate XA - Supervisor* for guidance.

Reply Using Another Channel

Your agents can reply to expired messages using a channel other than WhatsApp, such as SMS, email, or outbound voice. To do this, you would need to create the relevant channel. Contact our Syntelate XA Product Support team to discuss your requirements. You can reach Product Support at support@inisoft.com or +44 (0)800 668 1290.

3.13.5 Integration

To integrate with WhatsApp in Syntelate XA, you need to use a third-party WhatsApp Business solution provider. The third-party API establishes a connection from the

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WhatsApp Business API Client to Syntelate XA's API and MS SQL database.

Currently, Syntelate XA supports the following providers:

- MessageBird
- Sunshine Conversations

> **Note:** If you would prefer to use an alternative third-party provider, get in touch to discuss your requirements.

We can implement the integration for you as part of your Syntelate XA project. However, note that Syntelate XA projects do not include the third-party provider's fees. You'll need to sign up for an account with the provider and pay for that separately.

After you have created the integration, you need to create a social media message gateway in Syntelate XA to complete the setup of your WhatsApp channel. For guidance, seethe section, 'Message Gateways Configuration' in the document *Syntelate XA - Studio*.

3.13.6 More Information

Document	Description
Syntelate XA - Handling Chats	Explains how chat (which includes web chat, SMS chat, and social media chat) works from an agent's point of view.
Syntelate XA - Designer	Explains how to design desktops for your agents. To let your agents handle chats, add a chat to the desktop.
Syntelate XA - Smart Text Editor	Explains how to configure smart text for chat.

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4. Components

This document describes the various technical components of Syntelate XA.

4.1 Windows Services and Azure WebJobs

The following table describes Syntelate XA's Windows services and Azure WebJobs. Windows services are used in on-premises deployments and Azure WebJobs in cloud deployments.

> **Tip:** Each of these Windows services and Azure WebJobs have an appsettings.config file, which are documented in App Settings on page 202.

Service/WebJob	Description
Fulfilment Service	Processes fulfilments. For information about fulfilments, see document *Syntelate XA - Fulfilment Server*.
Inbound Gateway Service	Checks monitored mailboxes for new emails from customers. Also handles chat.
Outbound Gateway Service	Processes outbound emails and SMS messages (but not SMS chat messages).
Worklist Engine	Checks the INTERACTION_X table for work items (outbound calls, emails, chats, etc.) to pass to agents.
Worklist Import Web API	Allows records to be imported into the INTERACTION_X table via a JSON web API call. For more information, see document *Syntelate XA - Worklist Manager Importer*.

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4.2 Web Applications

The following table describes Syntelate XA's web applications.

Web Application	Description
Message Host	Hosts chat.

4.3 Telephony Integrations

The following grid describes Syntelate XA's telephony integrations.

(See Syntelate XA - Overview of Channels for information on other integrations currently available in Syntelate XA.)

Web API	Description
TAPI Web API	Used for communication between Syntelate XA and Avaya IP Office™. There are no app settings for the TAPI Web API.
TSAPI Web API	Used for communication between Syntelate XA and Avaya Aura® Communication Manager. There are no app settings for the TSAPI Web API.

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4.4 Other

Component	Description
Redis	An in-memory data structure store. Redis is used to store things like the session data, configuration, and agent/client connection details.

4.5 App Settings

Advanced configuration options for some Syntelate XA components are held in app settings files.

Each app settings file is an XML file, usually called **AppSettings.config**. These files can be edited in any program that handles XML files, such as Notepad.

> **Warning:** Be very careful when editing app settings files. Only make changes if you are sure you know what you are doing. A mistake could cause Syntelate XA to stop working correctly.

4.5.1 Fulfilment Service

The Fulfilment Service is responsible for running fulfilments. For information about configuring fulfilments, see document *Syntelate XA - Fulfilment Server*.

The app settings for the Fulfilment Service are stored in the **App.config** file, in the `<appSettings>` element.

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Setting	Description
pollingPeriodSeconds	
workListDatabases	
emailFrom	Defines the email address from which error or success emails should be sent, for example donotreply@syntelate.com.
emailErrorTitle	Defines the subject for error emails, for example Syntelate Studio Fulfilment Service Error Report: {datetime}.
emailErrorHeader	Defines text to appear at the start of error emails, for example The Syntelate Studio Fulfilment Service ran the Fulfilment '{fulfilmentname}' on {datetime}\n\n.
emailErrorFooter	Defines text to appear at the end of error emails, for example This email was generated by the Syntelate Studio Fulfilment Service.
emailSuccessTitle	Defines the subject for success emails, for example Syntelate Studio Fulfilment Service Report: {datetime}.
emailSuccessHeader	Defines text to appear at the start of error emails, for example The Syntelate Studio Fulfilment Service ran the Fulfilment '{fulfilmentname}' on {datetime}. \n\n.
emailSuccessFooter	Defines text to appear at the end of success emails, for example This email was generated by the Syntelate Studio Fulfilment Service.

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Setting	Description
serviceUser	
ClientSettings Provider. ServiceUri	

4.5.2 Inbound Gateway Service

The **AppSettings.Config** file for the Inbound Gateway service defines the app settings for this service. It contains the following application settings.

Setting	Description
ExchangeVersion	Defines the Microsoft Exchange version, for example Exchange2010.
EmailServerConnString	Defines the string for your email server connection.
FetchTimeSeconds	Defines how frequently to check mailboxes. For the value, enter a number for the time interval, in seconds, for example, 3.
ReadInboxMessage Folder	Possible values are true or false. If set to true, only emails from the inbox folder are processed by the Syntelate XA inbound service. If set to false, emails from all folders in the mailbox are processed, including any spam, junk, or other folders that exist.
AllowedExt	Defines the file name extensions that are allowed for customer

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Setting	Description
	email attachments. Type a comma-separated list. For example: `.doc,.docx,.docm,.pdf,.rtf` **Note:** If a customer attaches a file with a file name extension that is not included in this list, the email message is added to a new record in INTERACTION_X_MESSAGE but the attachment is not saved. For such a record, Syntelate XA sets LKTL_FILESTRIP to Y.
AsyncExchangeAccess	Defines whether mailboxes are polled asynchronously. Possible values are `true` and `false`. **Note:** We recommend that this setting is set to `false` unless the polling of mailboxes is time critical.
ErrorEmailTo	Defines the email address to which the daily error log report should be sent.
ErrorEmailTime	Defines the time at which the daily error log report email should be sent. Enter the time in the format `hh:mm`, using the 24-hour clock. For example, to send the email just before midnight, enter `23:59`.
ErrorEmailActive	Defines whether the daily error log report email should be sent. Possible values are `true` and `false`.
ErrorLogToSend	Defines the full path of the log file to attach to the daily error log

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Setting	Description
	report email.
ErrorEmailSubject	Defines the subject of the daily error log report email.
ErrorEmailBody	Defines the body text of the daily error log report email. Type \n for a new line. For example: `Please find attached the daily log of errors from the Inbound Gateway service.\n\n Regards,\n\n The Inisoft Team`
MaxAutoRepliesPer EmailAddressIn24Hrs	Limits the number of auto-reply emails sent to the same email address. We recommend setting this value to “3”.
MaxAutoRepliesPer InteractionIn24Hrs	Limits the number of auto-reply emails sent to the same interaction record. We recommend setting this value to “3”.
MaxRetries	Specifies the maximum number of receive attempts accepted before new inbound messages are ignored. We recommend setting this value to “2”. This setting is also used by the outbound gateway for send attempts; both gateways need to be set to the same value, which should be “2”.
sqlConnectionString	Required. Defines the SQL server connection string.

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Setting	Description
	For web chat, remember to also specify the ChatUrl to enable the inbound message gateway to process your web chat interactions.
ChatUrl	Required for web chat. Defines the URL of your Message Host web application. Remember to also specify the sqlConnectionString to enable the inbound message gateway to process your web chat interactions.
ChatConnectRetry IntervalSeconds	Defines the number of seconds to wait before attempting to reconnect if a web chat connection is lost.
SmsUrl	Required for SMS chat (but not outbound SMS). Defines the URL of your SMS API.
MailRefreshMins	Defines how frequently, in minutes, the Inbound Gateway service should check for new email rules. Email rules are defined in database table IMMAILBOXRULES. They can be managed via a configuration desktop. See the section Email Rules in *Syntelate XA - Supervisor*.

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Setting	Description
NewContactCreateAlways	Valid values: one or more email addresses. Wildcards may be used, such as an asterisk. You need to separate multiple email addresses by three pipe symbols. For example: *@inisoft.com|||auto-reply-dameon@hotmail.com|||accountholder@mail.com Defines whether to always create a new record in the CONTACT_X table for inbound emails, even if a contact already exists for the email address. If the value for NewContactCreateAlways is left blank, then incoming emails will be attached to the existing contact record if there is one. If no contact record exists for the email then a new contact record will be created.
IgnoreConversationIdAllContacts	Valid values: true | false For inbound email from either a new or an existing contact, this setting determines if the email will be chained to an existing email that has the same conversation ID and associated with the same interaction record. If set to true, then an inbound email will not be chained to an existing email. If set to false, then the inbound email will be chained to an existing email that has the same conversation ID and will be associated with the same interaction record as the existing email.

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Setting	Description
IgnoreConversationId NewContacts	Valid values: true | false For inbound email from newly created contacts, this setting determines if the email will be chained to an existing email that has the same conversation ID and associated with the same interaction record. We recommend specifying this setting to true. If set to true, then an inbound email from a newly created contact will not be chained to an existing conversation and therefore will not be associated with an existing interaction record. If set to false, then the inbound email will be chained to an existing email that has the same conversation ID and will be associated with the same interaction record as the existing email.

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4.5.3 Message Host

The Message Host **AppSettings.Config** file defines the configuration of the Message Host web application, which processes Syntelate XA's chat channels (web chat, WhatsApp, social media messaging). It contains the following settings.



Tip: To disable an entry, enclose it in a comment:

```
<!-- -->
```

Note that a comment cannot have two dashes anywhere in the comment except at the start and end.

Setting	Description
EnableTransfer	Valid values: true | false Default value: false Determines whether the Transfer button is displayed in the Chat control of the agent desktop.
MaxChatMinutes	Applies a limit, specified in minutes, to the length of a chat session.
RedisDatabase	Required. Defines the Redis database number.
RedisPort	Required. Defines the Redis port number.
RedisConnectionString	Required. Defines the Redis connection string.

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Setting	Description
ClientValidationEnabled	Valid values: true | false Standard ASP.NET MVC app setting. For Syntelate XA, the value must be set to true.
UnobtrusiveJavaScriptEnabled	Valid values: true | false Standard ASP.NET MVC app setting. For Syntelate XA, the value must be set to true.
aspnetspell_key	Specifies the license key for Nanospell, a plugin ASP.Net spell checker, used by the web chat application to provide user guidance on spelling.
hideEmailPrintChat	Valid values: true | false Determines whether the web chat will offer the customer the options to email or print the chat transcript.
ChatBotEnabled	Valid values: true | false Determines whether the chatbot is active.
ChatBot	For chat channels that use a third-party AI chatbot. Enter the name of the chatbot service.
ChatBotName	Enter the name of the chat bot avatar. If you don't want to use an avatar, this value can be left blank.
UltimateAIChatBotId	Only required for chat channels that integrate an Ultimate AI chatbot. Enter the ID of your chatbot.

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Setting	Description
UltimateAIChatBotURI	Only required for chat channels that integrate an Ultimate AI chatbot. Enter the URI of your Ultimate AI chatbot.
RenderChatHeadCss	Optional. This setting enables the web chat application to display embedded Google fonts. To achieve this, a CSS file must be created in the Web Chat directory of Syntelate XA, where the CSS specifies the HTML that will embed the Google font. When this CSS file exists, Syntelate XA will automatically pick up the HTML and inject it into the web page that hosts the web chat application. The value for this setting must be the filename of the new CSS file. Your Inisoft consultant will create the CSS file and update the app setting for you. After implementation, if you need to make a change to the CSS or change the value for this setting you must restart the Web Chat app pool in order for the change to be effected.
MaxFileSize	Specifies the maximum file size for attachments uploaded by the customer to the chat. Write the value in bytes (binary prefixes). So, you should specify “1048576” if the maximum file size limit is 1 MB.

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4.5.4 Outbound Gateway Service

The Outbound Gateway service checks INTERACTION_X_NEWMESSAGE for new messages. When the service finds a new message, it processes it as an outbound email, SMS, or printed letter as appropriate and then moves the record to the INTERACTION_X_MESSAGE table.

The **AppSettings.Config** file for the Outbound Gateway service defines the configuration for this service. It contains the following application settings.

Setting	Description
AllowedExt	Defines the file name extensions that are allowed for agent email attachments. Type a comma-separated list. For example: `.doc,.docx,.docm,.pdf,.rtf`
AsyncExchangeAccess	Defines whether the INTERACTION_X_NEWMESSAGE database table is polled asynchronously. Possible values are `true` and `false`. **Note:** We recommend that this setting is set to `false` unless the polling of this database table is time critical.
ConvertAutoReplyToFrench	This setting enables localization of Syntelate XA auto-reply emails for customers in Québec, Canada. Determines whether an auto-reply email sent from Syntelate

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Setting	Description
	XA to a Microsoft 365 email account will be automatically translated into Canadian French (fr-CA) and will convert its date and time details in the header to the original timezone. Valid values: true | false Default value: false

ConvertHTMLToPlainTextOldWords	Required. The HTML entities specified here will be converted into the Unicode characters listed in ConvertHTMLToPlainTextNewWords.
	
	Use the following:
	
	`value="’, ,&,",<,`
	
	`>,®,©,•,™,'"`

ConvertHTMLToPlainTextNewWords	Required. This key specifies the Unicode characters that will be converted from the HTML entities listed in ConvertHTMLToPlainTextNewWords. Use the following:

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Setting	Description

	<pre>value="’,
	,&,",<,>,®,©,•,
	™,'"</pre>

DatabaseConnectionTimeoutInMins	Defines the time period (in minutes) during which the Outbound Gateway service attempts to reconnect to the Syntelate XA database if the connection is lost. Valid values: A positive integer, for example, 20. Default value: 20
ExchangeVersion	Defines the Microsoft Exchange version, for example Exchange2010.
FetchTimeSeconds	Defines how frequently to check the INTERACTION_X_NEWMESSAGE database table. Type a number of seconds.
sqlConnectionString	Defines the SQL Server connection string.
ErrorEmailTo	Defines the email address to which the daily error log report should be sent.
ErrorEmailTime	Defines the time at which the daily error log report email should be sent. Enter the time in the format hh:mm, using the 24-hour clock. For example, to send the email just before midnight, enter 23:55.

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Setting	Description
ErrorEmailActive	Defines whether the daily error log report email should be sent. Possible values are true and false.
ErrorLogToSend	Defines the full path of the log file to attach to the daily error log report email.
ErrorEmailSubject	Defines the subject of the daily error log report email.
ErrorEmailBody	Defines the body text of the daily error log report email. Type \n for a new line. For example: `Please find attached the daily log of errors from the  .\n\n Regards,\n\n The  Team`
DontSendEmail	Defines whether the Outbound Gateway service should send emails/SMS. If set to false, the service will still process messages (move them from the INTERACTION_X_ NEWMESSAGE table to the INTERACTION_X_MESSAGE table). However, emails and SMS will not be sent. Possible values are true and false. In a live environment, this should be false.
SnippetsDateTimeFormat	Defines the date/time format for snippets, for example dd/MM/yyyy HH:mm:ss.
SnippetsDateFormat	Defines the date format for snippets, for example dd/MM/yyyy.

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Setting	Description
SnippetsTimeFormat	Defines the time format for snippets, for example HH:mm tt.
MaxRetries	We recommend setting this value to “2”. Defines the maximum number of send attempts permitted before the outbound message is ignored. This setting is also used by the inbound gateway for receive attempts; both gateways need to be set to the same value, which should be “2”.
ZangAPIURL	Defines the REST base URL required by the Avaya Communications API. The base URL that you'll need depends on your geographic region. You can find Avaya's list of base URLs by region in Avaya's documentation at: https://docs.avayacloud.com/aspx/rest#base-url.

4.5.4.1 Date and Time Notation

You can use the following notation when specifying a date and time in Syntelate XA.

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”.

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Format specifier	Description
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.
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.

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4.5.5 App Settings

Advanced configuration options for some Syntelate XA components are held in app settings files.

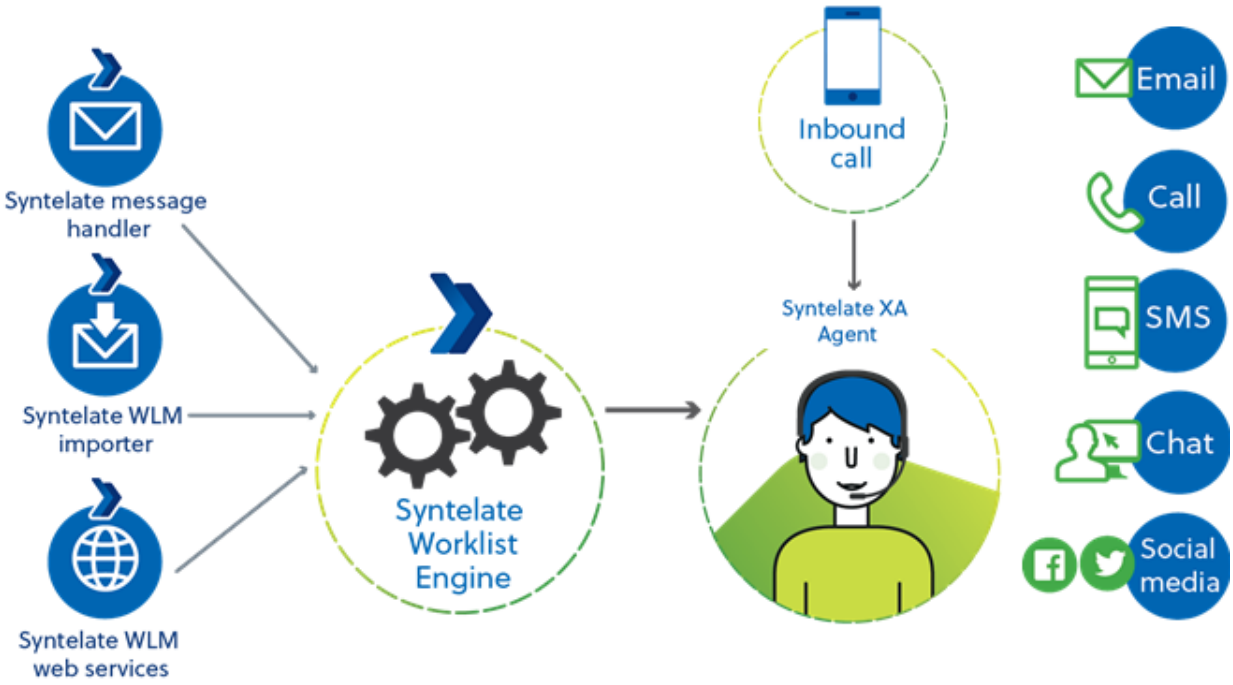
Each app settings file is an XML file, usually called **AppSettings.config**. These files can be edited in any program that handles XML files, such as Notepad.

> **Warning:** Be very careful when editing app settings files. Only make changes if you are sure you know what you are doing. A mistake could cause Syntelate XA to stop working correctly.

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4.5.6 Worklist Engine

With the exception of inbound calls, the Worklist Engine is responsible for passing all types of interactions to agents: outbound calls, emails, and chats (including web, SMS, and social media chats).



The **appsettings.config** file for the Worklist Engine defines the app settings for this service. It contains the following application settings.

Setting	Description
RefreshSeconds	
AgentDesktopUrl	Defines the URL of the agent desktop.

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5. Database Tables

This document describes those database tables of Syntelate XA that it is important for you to understand and which you may need to edit. Most of these database tables can be amended via a configuration desktop rather than directly in SQL Server Management Studio.

This document does *not* describe any database tables for which a dedicated user interface exists. For example, the following tables should not be amended directly but instead via the Interval Manager:

- INTERVALGROUP
- INTERVALHOLIDAYS
- INTERVALPATTERN
- INTERVALTASKS
- INTERVALWEEKDAYS

As such, these tables are not described here.

Similarly, this document does not describe tables or views related to reporting. It is important for you to be familiar with those, but you will not actually edit them. The tables and views used in reporting are described in document *Syntelate XA - Reporting*.

5.1 AGENT

The AGENT database table defines all the users who can log in to Syntelate XA.

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In this context, an “agent” could be a contact center agent, but it could also be a supervisor or manager, for example. All users of Syntelate XA are recorded in the AGENT table, regardless of their role at your organization.

Field	Description
AGENTNAME	The agent’s username in Syntelate XA. For cloud deployments, this should be the agent’s email address. For on-premises solutions, this should be the agent’s Windows username.
DESCRIPTION	The agent’s name as it should be displayed in Syntelate XA. In web chats, for example, this is how the agent’s name is shown to the customer.
NOTES	
DEFAULTCPGNO	
CTI_ENABLED	
EMAIL	
NAMEOFAGENT	The agent's full name. This is displayed in Syntelate XA and shown to customers.
DIRECTLINE	
DORMANT_FLG	Defines whether an agent record is dormant in the system or not. Set to 'True' or 'False'. When their record is dormant, an agent cannot log in to Syntelate

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Field	Description
	XA. Managers may wish to set an agent's record to dormant if the agent has left the organization, for example. A dormant agent record remains in Syntelate XA's database, so the agent's past activity will be included in any reporting on historical data.
MAXCHATS	Defines the maximum number of chats that the agent can handle at once. Leave blank to use the system maximum (as defined by the MAXNUM column in the CHANNELGROUP database table).
DTMF	A dual-tone multi-frequency number that is specific to the agent. For example, where each agent has a particular number that they dial when capturing customer's credit card details, you can record this here. You can then set up your agent desktop so that, when the agent has to capture customer's credit card details, they click a button and this number is automatically dialed.
CRMUSERNAME	Where you use Salesforce as your CRM, this field defines the agent's Salesforce username.

5.2 AGENT2AGENTGROUPS

The AGENT2AGENTGROUPS database table defines the agents that belong to each agent group. An agent can belong to multiple agent groups.

The table contains one record for each mapping between an agent group and an agent.

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Field	Description
AGENTGROUPNO	The agent group. References the AgentGroupNo field in the AGENTGROUPS table.
AGENTNAME	An agent who belongs to this agent group. References the AGENTNAME field in the AGENT table.

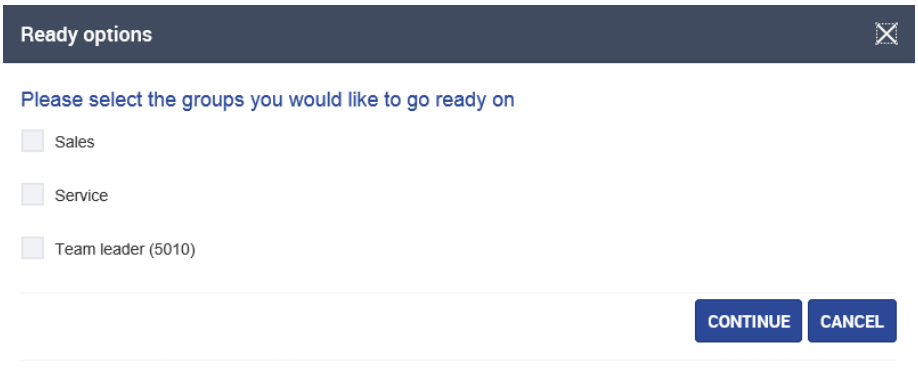
5.3 AGENTGROUPS

The AGENTGROUPS database table defines all the agent groups in Syntelate XA.

You use agent groups to control which agents deal with which interactions. For example, you can associate an agent group with a particular web chat topic. By doing this, only agents who belong to that agent group will deal with chats about that topic.

Field	Description
AgentGroupNo	A unique number for the agent group. Automatically added when you add a new record to this table.
AgentGroupName	A name for the agent group, for example Personal Travel or Business Travel.
CAN_JOIN	Where 1, agents can select this agent group when going ready, where you allow agents to select the groups that they want to go ready on.

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Field	Description
	 This is used in conjunction with: » The SHOWREADYOPTIONS_GROUP field in the WORKZONE table » The AGENTGROUPSHUNTGROUPS table For more information about this functionality, contact Inisoft Support.

5.4 CALLSTATUSLOGGING

See document *Syntelate XA - Reporting*.

5.5 CHANNELGROUP

The CHANNELGROUP database table lets you define, for each channel, how many interactions the Worklist Engine can push to agents to work on at one time.

As well as specifying a maximum for each channel individually, you can create channel groups. The easiest way to explain this is with an example. Take this table:

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CHANNELGROUP_COD	WORKZONE_ID	CHANNEL	MAXNUM
CHAT	1	CHAT	3
EMAILTASK	1	EMAIL	1
EMAILTASK	1	TASK	1
OUTBOUND	1	OUTBOUND	1

With the above settings, an agent on workzone 1 could be passed:

3 chats + (1 email *or* 1 task) + 1 outbound record

Here's a description of each of the fields of the table.

Field	Description
CHANNELGROUP_COD	A name for a grouping of channels.
WORKZONE_ID	Defines the ID of the workzone to which this row relates. You can add records for workzone 0. If no channel groups are found for the workzone that the agent is logged in to, Syntelate XA will check for records with a WORKZONE_ID of 0.
CHANNEL	Identifies the type of interaction record: » RECORD » PROMISE » EMAIL

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Field	Description
	» INBOUND » OUTBOUND » CHAT » SMS » TASK Matches the LKTL_WLMTYPE of the record type in the INTERACTION_X table.
MAXNUM	The maximum number of interactions that agents can handle at one time for this channel. For INBOUND and OUTBOUND, this must be 1.

5.6 COMPLETION_CODES

The COMPLETION_CODES database table defines all the completion codes that can be used to end a voice or email interaction.

A completion code can mark an interaction as **completed**. It is also the mechanism by which agents can arrange **retries** and **callbacks/recalls**.

To explain these terms, consider an outbound voice campaign:

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- **Completed:** The agent has successfully got in touch with the customer and has spoken to them. The interaction is now completed; there is no need for an agent to speak to the customer again about this matter.
- **Retry:** The agent attempted to call the customer but the customer did not answer. The customer should be tried again later, unless the maximum number of retries has been reached.
- **Callback (recall):** The agent got through to the customer but it was not a good time for the customer to talk. The customer asked to be called back on a particular date and at a particular time.

You can manage the COMPLETION_CODES database table via a configuration desktop.

Note: After directly updating the COMPLETION_CODES database table, you must refresh Redis for your changes to take effect at runtime.

Chat interactions can also use chat disposition codes. You define these in the Message Gateway configuration tile of Syntelate Studio: see document *Syntelate XA - Message Gateway Configuration*.

Field	Description
ID	A unique ID for the record. Automatically added when you add a new record to this table.
CODE	A unique completion code. Where an agent closes an interaction using this completion code, this value is written to the LKTL_COMPLETECODE field of the INTERACTION_X table.

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Field	Description
DESCRIPTION	A description of the completion code, such as Retry - 1 hour.
CALLCOMPLETE	Possible values are Y and N. If Y, Syntelate XA subsequently writes Y to the LKTL_COMPLETED field in the INTERACTION_X table. If N, this indicates that the interaction record has not yet been completed, so the record will remain in process until it is.
RETRYINTERVAL	Defines a retry interval in hours. This sets the LKTL_RETRYAFTER field in the INTERACTION_X table. You can use decimals. For example, a RETRYINTERVAL of 0.5 means that Syntelate XA will pass the record to an agent to try again in 30 minutes. Use retries with outbound voice campaigns where you want agents to attempt to contact the customer a set number of times before giving up. Each retry decrements the LKTL_NUMTRIES field. When this field reaches 0, the Worklist Engine stops trying to pass the record to an agent. You can *either* set a retry *or* a callback (recall). As such, where you set a value in RETRYINTERVAL, you must set RECALLCODE to N (or NULL).
RECALLCODE	Defines a callback (recall). Possible values are Y and N (or NULL). This should be used where the agent gets in touch with the customer but it's not a good time to talk. As such, the agent

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Field	Description
	agrees to call back at a specified time. Where you set this to Y, you must set the LKTL_RETRYAFTER field in the INTERACTION_X table to the callback date and time. You could do this via a date box with intervals control on the agent's desktop, for example, allowing the agent to select a date and time that suits the customer. You can *either* set a callback (recall) *or* a retry, so where you set a value in RECALLCODE, you must set RETRYINTERVAL to NULL.
AOR_FLG	For a callback (recall), defines whether the callback should be agent-owned. This writes to the LKTL_RETRYAGENT field of the INTERACTION_X table. Where a callback is agent-owned, Syntelate XA will try to pass the interaction back to the same agent. In the INTERACTIONTYPE table, you can define for how long interactions should remain agent-owned before the Worklist Engine tries to pass the interaction to another agent if the assigned agent is unavailable.
CBPRIORITY	Defines the priority to assign to the callback or retry, where you want to change this from the existing priority. Sets the LKTL_ CBPRIORITY field of the INTERACTION_X table.
AGENTGROUP_NO	Where the callback or retry should be handled by a particular agent group, defines this group. References the AgentGroupNo

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Field	Description
	field of the AGENTGROUPS table.
WLMTYPE	Sets the LKTL_WLMTYPE field in the INTERACTION_X table. It usually makes sense to set this to OUTBOUND (which represents an outbound voice call). For example, say the agent is handling an inbound call but needs to arrange a callback to the customer. You'd need to change the LKTL_WLMTYPE field in the INTERACTION_X table from INBOUND to OUTBOUND to allow the Worklist Engine to pick up the record at the right time.
INTERVALGROUP_ID	Where you would like to associate a particular interval group with a callback or retry, defines the interval group. References the INTERVALGROUP_ID field of the INTERVALGROUP table.
SENDMSG	You can use this field and the following fields to create an outbound message in the INTERACTION_X_NEWMESSAGE table to be picked up by the Outbound Gateway service. Set to 1 to create an outbound message.
MSGTYPE	Sets the LKTL_TYPE field in the INTERACTION_X_ NEWMESSAGE table. Possible values are E (for email), S (for SMS), and X (for a dialog box shown to agents).
MSGMAILBOXNO	The message gateway to use to send the message. References the IMMAILBOXNO field in the IMMAILBOX table.
MSGSNIPPETNO	Defines the snippet to use as the body of the message.

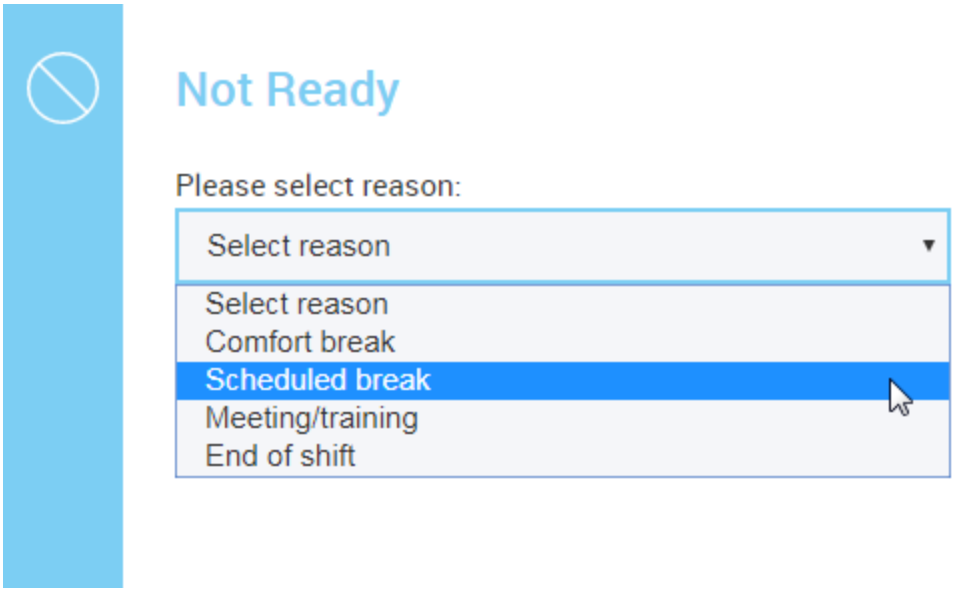
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Field	Description
	References the SNIPPET_NO field in the SNIPPET table.
MSGTOFIELD	Defines the field containing the email address / phone number to which the message should be sent. The format of this field is: TABLE.FIELD
DONOTCALL	If Y, adds the customer's phone numbers to the DONOTCALL table. The following fields from the interaction record are added as records to the DONOTCALL table: LKTL_PHONENUMBER, LKTL_NEXTDIALNUMBER, LKTL_MOBILENUMBER, LKTL_LANDLINENUMBER.

5.7 CTINOTREADYREASONS

The CTINOTREADYREASONS database table defines the not ready reasons that agents can select when going not ready in Syntelate XA.

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Field	Description
ReasonCode	**Valid values**: A unique alphanumeric string. Defines the unique code that is stored in the REASONCODE field of the CALLSTATUSLOGGING table when the agent selects this not ready reason after going not ready. **Note:** A ReasonCode is set in the database when the agent submits their **Not ready** reason, but it can also be set when a supervisor uses the Agent Control Center. If you are using the Agent Control Center, you need to add the reason codes **ForcedBreak** and **ForcedNotReady**.
CTITYPE	**Valid values**: A string that must be either Telephony, Worklist, or System. Defines the CTI (Computer Telephony Integration) configuration that the not ready reason is used in.

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Field	Description
	Tip: Valid values are Telephony, Worklist and System. Set CTITYPE to Telephony if the not ready reason will be used on a third-party telephony channel (TSAPI, IP Office, POM, etc.). Set it to Worklist if the reason will be used on other channels. Set it to System for the not ready reason codes **ForcedBreak** and **ForcedNotReady** if you are using the Agent Control Center.
ReasonDesc	**Valid values**: A unique alphanumeric string. Defines the not ready reason that is shown to the agent in the **Please select reason** dropdown of the **Not Ready** dialog box.
ActiveCode	**Valid values**: 1 or 0, where 1 represents active and 0 represents inactive. Determines whether the reason code and description will be active or inactive.
AuxCode	The aux code to pass to TSAPI when this not ready reason is selected. Only used for TSAPI and is used by Avaya Aura® Communication Manager.

Tip: If you don't want to directly edit the database table, you can manage the reasons in CTINOTREADYREASONS by using the Not Ready Reasons pane of the Syntelate XA Configuration Desktop.

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5.8 DONOTCALL

The DONOTCALL database table defines phone numbers that Syntelate XA should not dial.

The do not call list is populated when an agent completes an interaction with a completion code that has the DONOTCALL field set to Y: see the COMPLETION_CODES table. This adds the following fields of the interaction record to the DONOTCALL table:

- LKTL_PHONENUMBER
- LKTL_NEXTDIALNUMBER
- LKTL_MOBILENUMBER
- LKTL_LANDLINENUMBER

Say all four of these fields are populated in the INTERACTION_X table, each with a different phone number. This would result in four new records being added to the DONOTCALL table.

Whenever records are added to the INTERACTION_X table (by the Worklist Manager Importer, say) the Worklist Engine checks the above fields. Where one (or more) of these fields contains a phone number that is in the DONOTCALL table, the Worklist Engine updates the interaction record to set LKTL_COMPLETED to Y and LKTL_COMPLETECODE to DONOTCALL.

Field	Description
ID	A unique ID for the record. Automatically added when a new record is added to this table.

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Field	Description
CAMPAIGN	Where populated, the do not call instruction applies to a particular campaign only. References LKTL_CAMPAIGN in the L_ CAMPAIGNS database table. Automatically added where the interaction in the INTERACTION_X table has the LKTL_CAMPAIGN field populated.
PHONENUMBER	The phone number that should not be dialed.

5.9 IMMAILBOX

The IMMAILBOX table stores settings for message gateways. Usually, you would configure these settings in Message Gateways Configuration on page 586 in Studio when you create or edit a message gateway. However, you can also edit them directly in the database.

Field	Description
IMMAILBOXNO	An automatically generated unique number for the message gateway's mailbox.
IMMAILBOX	Only used for email message gateways and for SMS outbound message gateways. » For email, it stores the mailbox name, such as info@yourcompany.com. » For SMS outbound, it stores the ACCOUNT_SID of the user account at the SMS provider.

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Field	Description
IMPASSWORD	Used only by email message gateways for Microsoft Exchange mailboxes to store the password for the mailbox, and by SMS outbound gateways to store the SMS provider's API AUTH_TOKEN (sometimes called the API key).
CPG_NUMBER	The unique number of the Syntelate XA data universe that this mailbox is part of.
IMLOOKUP_TABLE	The table in Syntelate XA that contains your customers' contact details.
IMLOOKUP_EMAIL	From the table named in IMLOOKUP_TABLE, the field that stores your customer's email address or phone number. Syntelate XA uses this field to match up incoming messages to existing customers. Whether you choose an email field or phone number field will depend on the type of message gateway. Phone numbers are used for SMS and social media channels. Email addresses are used for email and web chat channels.
IMLOOKUP_ID	From the table named in IMLOOKUP_TABLE, the field that contains unique customer IDs. Syntelate XA uses this field to identify the customer.
IMCLIENT_MAP	The field in the INTERACTION_X table that Syntelate XA should match against the field specified in IMLOOKUP_ID.
IMATTACHPATH	The value can either be 'database' or the full path to the

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Field	Description
	directory where attachments for this mailbox are stored. If this field is blank, attachments are disabled.
IMLIVE	Sets the status of the mailbox. Either 'Y' for active or 'N' for inactive.
IMOPTOUT	The opt out option is a feature of SMS and email gateways. It gives agents a means to capture the customer's preference for whether to allow the business to retain the customer's details for use in marketing communications.
LKTL_TYPE	Stores the Type of message gateway of message gateway.
SERVERCONNSTRING	For email and SMS message gateways, the connection string to the email server or API.
SMARTTEXTGROUP_CODE	For social messaging, SMS chat, and web chat gateways, this field stores the smart text group code assigned to the message gateway. It determines which smart text items are available to the chat element of an agent's desktop. Each chat gateway can use only one smart text group. For email gateways, this field stores the Snippet Groups on page 678 code assigned to the mailbox. It determines which snippets are displayed on the toolbar of the HTML editor of an agent's desktop. Each mailbox can use only one snippet group.
PRECHATGREETING	Predefined chat message sent to the customer before the

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Field	Description
	customer is connected to an agent. You can edit the content of predefined chat messages in Message Gateway configuration. See the document, *Syntelate XA - Message Gateway Configuration*.
CONNECTEDGREETING	Predefined chat message sent to the customer when they are connected to an agent. You can edit the content of predefined chat messages in Message Gateway configuration. See the document, *Syntelate XA - Message Gateway Configuration*.
CLIENTAUTOMSGMINS	Tells Syntelate XA how many minutes to wait after an agent has sent a message before automatically sending another message on behalf of the agent, if the customer did not send a message in this time frame. If the value is 0, the message is disabled. You can edit this setting in Message Gateway Configuration, in the **Auto-response time after agent sent message (minutes)** box.
OBMAILBOXNO	The mailbox used by web chat gateways to store the chat transcripts.
MSGMAILBOXNO	The mailbox used by web chat gateways to store messages left by customers when they use the Leave A Message option.
AGENTAUTOMSGMINS	Tells Syntelate XA how many minutes to wait after receiving a message from a customer before automatically sending the AGENTAUTOMSG message on behalf of the agent if

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Field	Description
	they have not replied to the customer. If the value is '0', the message is disabled. You can edit this setting in Message Gateway Configuration, in **Auto-response time (minutes)**.
LOCKED_BY	The username of the person who locked the message gateway.
LOCKED_AT	The time and date when the message gateway was locked.
AMENDED_AT	The time and date when the message gateway was amended.
AMENDED_BY	The username of the person who amended the message gateway.
NOACCEPTTIMEOUT	The number of minutes that a chat can idle before being automatically ended. When the NOACCEPTTIMEOUT time limit is reached, the customer's web chat will display either the Leave a Message option or the NOAGENTSAVAILABLE chat message, depending on the specification of the implementation.
IMMAILBOX_DESCRIPTION	In Message Gateway Configuration, this is labeled **Description**.
SMS_MAX_MESSAGES	Maximum number of messages permitted by the SMS message gateway.

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Field	Description
DESTINATION	It tells Syntelate XA which third-party messaging service the gateway connects to. Third-party messaging services are used to provide AI chatbots, SMS messaging and chat, email, and social messaging. Destination is case and whitespace sensitive.
TINYURL_CONNECTION	Optional. The API URL for the third-party URL shortening service, if one is used. Used for email, SMS chat, and web chat message gateways.
TINYURL_KEY	The API key to connect to the URL shortening service specified in TINYURL_CONNECTION.
SENDERID	The sender ID of your account with the third-party shortening service specified in TINYURL_CONNECTION.
IMLOOKUP_TYPE	Type of value being used as the IMLOOKUP field.
IDLE_TIME	If the customer does not reply to the CLIENTAUTOMSG chat message "Are you still there?", then the minutes specified in IDLE_TIME tell Syntelate XA when to ask the agent to end the chat.
ENABLEREPORTING	Enables or disables reporting for the message gateway.

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Field	Description
ACCESS_TOKEN	The access token for the mailbox account's Microsoft Office 365 API or Microsoft Graph API. Used for Microsoft Office 365 mailbox accounts only.
ACCESS_TOKEN_SECRET	The access token secret for the mailbox account's Microsoft Office 365 API or Microsoft Graph API. Used for Microsoft Office 365 mailbox accounts only.
CONSUMER_KEY	The consumer key for the mailbox account's Microsoft Office 365 API or Microsoft Graph API. Used for Microsoft Office 365 mailbox accounts only.
CONSUMER_SECRET	The consumer secret for the mailbox account's Microsoft Office 365 API or Microsoft Graph API. Used for Microsoft Office 365 mailbox accounts only.
COMPLETIONLINKHTML	Stores HTML. Used for email gateways when you want to use a non-Syntelate XA email completion button. The button that you wish to use should be provided in HTML format; you will see options for doing that when you create the message gateway.
FIRST_RESPONSE_SLA_TOTAL_MINUTES	A time frame in minutes that's used by one of the email reports to check if an email is processed within the specified time frame. The time frame in this field is used for reporting on emails received out of hours and in working hours.

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Field	Description
FIRST_RESPONSE_SLA_WORKING_MINUTES	A time frame in minutes that's used by one of the email reports to check if an email received during working hours is processed within the specified time frame. The time frame in this field is used for reporting on emails received during working hours only.
IMATTACHMAXSIZEKB	Used for web chat message gateways. The maximum size in kilobytes for attachments. Tip: Enter '4096' if you want the limit to be 5 MB.
CHATBOT_ENABLED	Sets the status of the chatbot client to active or inactive.
CHATBOT_TYPE	When used, it specifies the third-party chatbot provider for the gateway.
CHATBOT_URI	The absolute path to the chatbot client on its server.
NOEMAILBEFORE_DATE	Used by email message gateways to apply a date restriction to the historical emails retrieved by Syntelate XA from your external inbox. Syntelate XA will not retrieve any emails that are older than the date specified here. If no date is specified, then all emails will be retrieved. The retrieval is carried out when you first create the message gateway. For example, if NOEMAILBEFORE_DATE is 2021-12-31 24:00:00, then only emails dated on or after midnight on the 31st of December 2021 will be imported into Syntelate XA.

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Field	Description
MessageExpiryMins	Optional. Can be used for social messaging chat gateways. When a social messaging chat is received, it exists in the queue for the time (in minutes) specified here, after which point it expires and is removed from the queue.

5.10 INTERACTIONTYPE

The INTERACTIONTYPE database table defines, for each interaction type, how long an interaction should remain:

- Agent-owned
- Work team owned
- Workzone-owned

Field	Description
INTERACTIONTYPE_COD	Defines the type of interaction, such as EMAIL or OUTBOUND.
INTERACTIONTYPE	
AOR_LIMITMINS	The number of minutes that the Worklist Engine should attempt to assign an agent-owned interaction to the specified agent before assigning it to someone else.
TOR_LIMITMINS	The number of minutes that the Worklist Engine should attempt to assign a work team owned interaction to an agent in the

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Field	Description
	specified work team before assigning it to someone else.
ZOR_LIMITMINS	The number of minutes that the Worklist Engine should attempt to assign a workzone-owned interaction to an agent in the specified workzone before assigning it to someone else.

5.11 INTERACTION_X

The INTERACTION_X table is a core part of Syntelate XA. It contains one record for every interaction with a customer, regardless of channel. This includes interactions that are completed, in progress, and pending.

For pending interactions, the Worklist Engine looks at various fields of the INTERACTION_X table to determine when to pick up an interaction record and to which agent it should pass the record. For example, the LKTL_RETRYAFTER field, when it is populated, defines the time at which the Worklist Engine should start trying to pass the record to an agent.

The X in INTERACTION_X represents a unique number for the universe. Each universe has its own INTERACTION_X table.

To import records of outbound calls to make into INTERACTION_X, use the Worklist Manager (WLM) Importer. For more information, see document *Syntelate XA - Worklist Manager Importer*.

The following is a description of the system ("LKTL") fields of an INTERACTION_X table. You can also add your own fields to this table, say for a script.

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Field	Description
LKTL_CLIENTNO	A unique ID for the interaction record.
LKTL_ AGENTGROUPNO	Where set, the Worklist Engine will only pass the interaction record to an agent who is a member of this agent group. References the AgentGroupNo field of AGENTGROUPS.
LKTL_AGENTNAME	The agent who (last) handled the interaction record. References the DESCRIPTION field ofAGENT. The name stored in this field is what you see in the **Agent Name** column of the Agents grid on the Configuration Desktop.
LKTL_AGENTNOTES	Notes saved by the agent against the interaction record. In the Designer, associate a multiline text box with this field to allow agents to save notes.
LKTL_ APPTCANCELLED	
LKTL_CALLLOGID	
LKTL_CALLTYPE	
LKTL_CBPRIORITY	A number representing the priority of the interaction record, where 1 is the highest priority and higher numbers are of a lower priority. The Worklist Engine looks at this when deciding what interaction to next pass an agent.
LKTL_CHATTYPE	For a chat, the type of chat, for example FACEBOOK, TWITTER, or WEBCHAT.

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Field	Description
LKTL_CLI	For inbound voice calls, the customer's telephone number (CLI = Calling Line Identification).
LKTL_CLTCREATE	The date and time when the interaction record was created.
LKTL_COMPLETECODE	The completion code used to end the interaction. References the CODE field of COMPLETION_CODES.
LKTL_COMPLETED	Defines whether the call is completed (Y or N). The Worklist Engine only picks up records that are not yet completed.
LKTL_CPGNO	The universe. References the UNIVERSE_ID field of the UNIVERSE view.
LKTL_DDI	For inbound voice calls, the DDI (Direct Dial In) number that was dialed.
LKTL_DONOTCALL	
LKTL_ EXCLUDEDAGENTID	
LKTL_ INTERACTIONTYPE	The type of interaction, for example OUTBOUND or FACEBOOK. References the INTERACTIONTYPE_COD field of INTERACTIONTYPE.
LKTL_ISPRIVATE	Defines whether a social media chat is private (Y) or public (N). Syntelate XA currently supports private social media chats, not

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Field	Description
	public, so this value should be Y.
LKTL_ LANDLINENUMBER	The customer's landline number.
LKTL_LANGUAGE	
LKTL_LASTAGENT	The agent who last saved the interaction record. References the AGENTNAME field of AGENT. The name stored in this field is the agent's Syntelate XA username.
LKTL_LASTSAVED	The date and time when the interaction record was last saved.
LKTL_LIFO	A date and time to be used for "last in first out" ordering. Where populated, the Worklist Engine prioritizes records with a more recent date and time in this field over records with an older date and time.
LKTL_MOBILENUMBER	The customer's cell phone number.
LKTL_MSGRESPDATE	
LKTL_MSGRESPONSE	
LKTL_ NEXTDIALNUMBER	Used for auto-dial (where Syntelate XA automatically dials an outbound call when an interaction record pops to the agent). Defines the phone number that Syntelate XA should dial. Use in conjunction with LKTL_PREVIEWDELAY.

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Field	Description
LKTL_NUMTRIES	For an outbound call, the number of retries left. Syntelate XA decrements this by 1 each time that a call is completed with a completion code that has RETRYINTERVAL set: see COMPLETION_CODES. When 0, the Worklist Engine will stop trying to push this record to an agent.
LKTL_PHONENUMBER	
LKTL_POPTIME	The time that the record popped to the agent. This field is populated when the record is saved. In the case of records that are popped more than once, for example in the case of a callback, then the existing LKTL_POPTIME is overwritten with the new pop time. LKTL_POPTIME is also saved to the INTERACTION_x_HISTORY table.
LKTL_PREVIEWDELAY	Where you wish an outbound voice call to be auto-dialed, this field provides the number of seconds that Syntelate XA should allow the agent to preview the record before dialing the customer. Set to 0 to dial the customer immediately or to null to disable auto-dial.
LKTL_QTIME: BIGINT	The time the call has been in the queue.
LKTL_RETRYAFTER	The date and time at which the Worklist Engine can start trying to pass the interaction record to an agent. For a callback, for example, this would be the callback time.
LKTL_RETRYAGENT	The agent who should handle the interaction, where it should be handled by a specific agent. References the AGENTNAME field

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Field	Description
	of AGENT. In the INTERACTIONTYPE table, you can define for how long interactions should remain agent-owned before the Worklist Engine tries to pass the interaction to another agent if the assigned agent is unavailable.
LKTL_RETRYBEFORE	The date and time at which the Worklist Engine should *stop* attempting to push the interaction record to an agent.
LKTL_SNIPPETS	Whenever snippets are used, their numbers are recorded in this field. This lets you track and analyze snippet usage.
LKTL_SOCIALMEDIA_ID	For a social media chat, the customer's social media ID.
LKTL_STATUS	
LKTL_TIMEZONE	
LKTL_TZOFFSET	The number of hours offset from Coordinated Universal Time (UTC). Include a - where behind UTC, for example -1.
LKTL_UCID	The Universal Call Identifier for an inbound call.
LKTL_USEDBYAGENT	The agent currently working on the interaction record (where the interaction record is being worked on). References the AGENTNAME field of AGENT.
LKTL_USESTARTED	The date and time that the agent started working on this interaction record (where the interaction record is being worked

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Field	Description
	on).
LKTL_UUI	User-to-user information for an inbound call.
LKTL_WLMTYPE	Identifies the type of interaction record: » RECORD » PROMISE » EMAIL » INBOUND » OUTBOUND » CHAT » SMS » TASK Where CHAT, the type of chat is identified by LKTL_CHATTYPE.
LKTL_WORKZONE_ID	Where set, the Worklist Engine will only pass the interaction record to an agent who is logged in to this workzone. Only relevant where LKTL_AGENTGROUPNO and LKTL_WORKZONETEAM_ID are null. References the WORKZONE_ID field of WORKZONE. In the INTERACTIONTYPE table, you can define for how long interactions should remain workzone-owned before the Worklist

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Field	Description
	Engine tries to pass the interaction to an agent logged in to another workzone.
LKTL_ WORKZONETEAM_ID	Where set, the Worklist Engine will only pass the interaction record to an agent who is logged in to this work team. Only relevant where LKTL_AGENTGROUPNO is null. References the WORKTEAM_ID field of WORKTEAM. In the INTERACTIONTYPE table, you can define for how long interactions should remain work team owned before the Worklist Engine tries to pass the interaction to an agent who is logged in to a different work team of the workzone.

5.12 INTERACTION_X_FEEDBACK

The INTERACTION_X_FEEDBACK database table contains customer feedback from web chats and Voice of the Customer feedback surveys.

Field	Description
ID	A unique ID for the record.
LKTL_ CLIENTNO	The interaction associated with the feedback. References the LKTL_ CLIENTNO field of the INTERACTION_X table.
CREATE_DT	The date and time at which the record was added.
REF	Defines the source of the feedback, for example CHAT (web chat).

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Field	Description
RATING	The rating left by the customer, where a rating was left. Where used, 👍 is 5 and 👎 is 0.
COMMENTS	The feedback comment left by the customer, where a comment was left.

5.13 INTERACTION_X_HISTORY

The INTERACTION_X_HISTORY table stores a copy of every past interaction record from INTERACTION_X. These records are automatically copied across to INTERACTION_X_HISTORY whenever they are created or updated in INTERACTION_X.

You can access the historical data to generate audit reports on your contact center's customer interaction activity. For example, if you are developing a training strategy for your agents, you might wish to compare the Voice of the Agent feedback for Web Chat and Telephony over the past fiscal year.

To set up access to your **INTERACTION_X_HISTORY** table, contact Inisoft Support at support@inisoft.com.

5.14 INTERACTION_X_MESSAGE

The INTERACTION_X_MESSAGE database table contains:

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- Inbound emails
- Outbound emails and SMS that have been sent
- Transcripts of chats
- Printed letters to customers

Outbound messages awaiting sending are stored in the INTERACTION_X_ NEWMESSAGE table.

Field	Description
LKTL_MESSAGENO	A unique ID for the message. Automatically added when a new record is added to this table.
LKTL_IMMAILBOXNO	The message gateway associated with the message. References the IMMAILBOXNO field of the IMMAILBOX table.
LKTL_CLIENTNO	The interaction associated with the message. References the LKTL_CLIENTNO field of the INTERACTION_X table.
LKTL_MESSAGE	The body of the email or SMS message, the chat transcript, or the text of the printed letter.
LKTL_TYPE	Defines whether the message is inbound (I) or outbound (O).
LKTL_MESSAGEID	For emails, a unique ID for the email from the email system.
LKTL_ CONVERSATIONID	For emails, the ID of the conversation from the email server. Not used.
LKTL_SUBJECT	The subject of an email. For a chat, the word Chat is populated.

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Field	Description
LKTL_DATE	The date of the email/chat/SMS.
LKTL_TIME	The time of the email/chat/SMS.
WHITEMAIL_FLG	Indicates a printed letter to the customer. Letters, as with emails and SMS, can be added to the INTERACTION_X_NEWMESSAGE table. They are then moved to the INTERACTION_X_MESSAGE table by the Outbound Gateway service.
LKTL_CONFGROUP	The confirmation agent group, where an outbound email required confirmation before sending. References the AgentGroupNo field of the AGENTGROUPS table.
LKTL_CONFAGENT	The agent who confirmed the email, where an outbound email required confirmation before sending. References the AGENTNAME field of the AGENT table.
LKTL_CONFDT	The date and time that the email was confirmed, where an outbound email required confirmation before sending.
LKTL_ ORIGMAILBOXNO	For a left message, records the message gateway of the associated web chat topic. References the IMMAILBOXNO field in the IMMAILBOX table.
LKTL_EMAIL	The customer's email address or phone number.

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5.15 INTERACTION_X_MESSAGEATT

The INTERACTION_X_MESSAGEATT database table contains one record for each email attachment for:

- Inbound emails
- Outbound emails that have been sent

For attachments for outbound emails awaiting sending, see INTERACTION_X_NEWMESSAGE.

Field	Description
LKTL_ATTACHNO	A unique ID for the attachment.
LKTL_MESSAGENO	The email to which the attachment relates. References the LKTL_MESSAGENO field of the INTERACTION_X_MESSAGE table.
LKTL_CLIENTNO	The interaction record to which the email attachment relates. References the LKTL_CLIENTNO field of the INTERACTION_X table.
LKTL_FILENAME	The file name of the attachment.
LKTL_FILE	The full path of the attachment, including the file name.
LKTL_FILESTRIP	Indicates whether Syntelate XA has stripped the attachment (Y) or not (N). Attachments are stripped where the file name extension (such as .pdf or .docx) is not in your list of supported file name extensions in the Inbound Gateway Service's app settings.
LKTL_READ	Not used: always set to N.

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5.16 INTERACTION_X_NEWMESSAGE

The INTERACTION_X_NEWMESSAGE database table contains outbound emails and SMS that are awaiting sending, as well as printed letters to be sent to customers.

Once these are picked up by the Outbound Gateway service, these records are removed from here and added instead to INTERACTION_X_MESSAGE (unless there is an error while sending an email/SMS).

Field	Description
LKTL_ NEWMESSAGENO	A unique ID for the message. Automatically added when a new record is added to this table.
LKTL_CLIENTNO	The interaction associated with the message. References the LKTL_CLIENTNO field in the INTERACTION_X table.
LKTL_MESSAGE	The body of the email, SMS message, or printed letter. *Either* this field *or* BODY_SNIPPET_NO should be set, but not both.
LKTL_TYPE	Defines whether the message is an email (E), SMS (S), or dialog box displayed to an agent (X).
LKTL_ CONVERSATIONID	Not used.
LKTL_SUBJECT	The subject of an email. *Either* this field *or* SUBJECT_SNIPPET_NO should be set, but not both.

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Field	Description
LKTL_TO	The email address or phone number to which the message should be sent.
LKTL_CC	For email, an email address that should be CCed in the email.
LKTL_FROM	The message gateway that should be used to send the email/SMS. References the IMMAILBOXNO field of the IMMAILBOX table.
LKTL_CONFGROUP	If an email needs to be reviewed before sending, the agent group of users who can review the email. References the AgentGroupNo field of the AGENTGROUPS table.
LKTL_CONFAGENT	The user who reviewed the email. References the AGENTNAME field of the AGENT table.
LKTL_CONFDT	The date and time of the review.
LKTL_SENDATT	The date and time that the Outbound Gateway service attempted to send the message.
LKTL_SENDCONF	The date and time that the email was sent.
LKTL_SENDERR	An error message where the Outbound Gateway service could not send the message.
LKTL_MERGEDATA	
WHITEMAIL_FLG	Set to Y for a printed letter.

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Field	Description
LKTL_COMPLETED	Marks the message as being ready to be picked up by the Outbound Gateway service (Y) or not (N).
LKTL_ MANUALLYEDITED	Not currently used.
LKTL_SENDATTEMPT	Where a message has not successfully sent, records the number of times that the Outbound Gateway service has attempted to send it.
BODY_SNIPPET_NO	A snippet to use for the body text. References the SNIPPET_NO field of the SNIPPET table. *Either* this field *or* LKTL_MESSAGE should be set, but not both.
SUBJECT_SNIPPET_ NO	A snippet to use for the subject (for an email). References the SNIPPET_NO field of the SNIPPET table. *Either* this field *or* LKTL_SUBJECT should be set, but not both.
LKTL_MSGTYPE	
LKTL_MSGTIMEOUT	
LKTL_SENDDATE	The date that the message should be sent. Where populated, the Outbound Gateway service won't pick up the message until this date.
LKTL_SENDTIME	The time that the message should be sent. Where populated, the Outbound Gateway service won't pick up the message until this time.

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5.17 INTERACTION_X_NEWMESSAGEATT

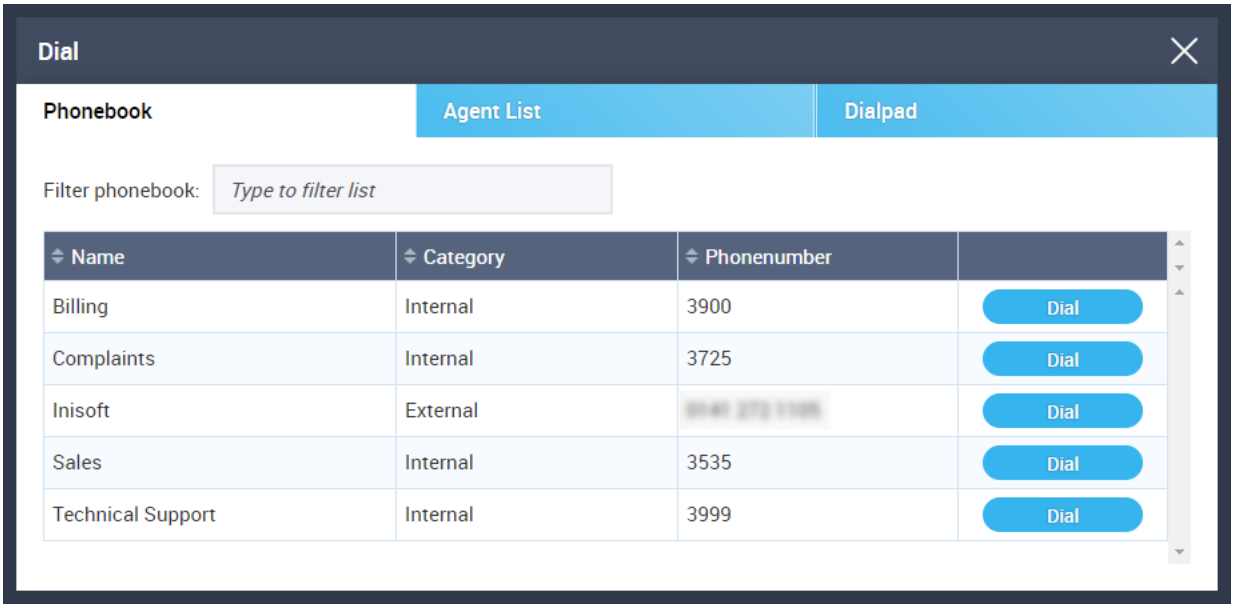
The INTERACTION_X_NEWMESSAGEATT database table contains one record for each email attachment for outbound emails that have not yet been sent.

Field	Description
LKTL_ NEWMESSAGEATTACHNO	A unique ID for the attachment.
LKTL_NEWMESSAGENO	The email to which the attachment relates. References the LKTL_MESSAGENO field of the INTERACTION_X_ MESSAGE table.
FILENAME	The file name of the attachment.
FILEPATH	The full path of the attachment, including the file name.
LKTL_NEWMESSAGECOUNT	

5.18 PHONEBOOK

The PHONEBOOK database table contains a list of records that appear in the agent's phonebook at runtime.

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You can manage the PHONEBOOK database table via a configuration desktop.

Field	Description
PHONEBOOK_ID	A unique ID for the phone book entry.
PhoneNumber	The phone number.
DisplayName	The entry name to be displayed to the agent in the phone book.
NumberActive	Defines whether the number is active (Y) or not (N). Inactive phone numbers do not appear in agents' phone books at runtime.
PhoneBookDefault	Defines whether this entry shows by default for all workzones (Y) or not (N). When set to N, this can be used in conjunction with the PHONEBOOKWORKZONES table to show the entry only to agents logged in to a particular workzone.

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Field	Description
PhoneBookType	Defines whether the entry appears in the agents' internal phone book (Internal) or external phone book (External).

5.19 PHONEBOOKWORKZONES

The PHONEBOOKWORKZONES table lets you associate a particular phone book entry with a particular workzone. When you do this, that phone book entry only shows to agents who are logged in to that workzone.

For this to work, in the PHONEBOOK table, the phone book entry must have PhoneBookDefault set to N. Otherwise, the entry will show to agents logged in to all workzones.

Note: After updating this database table, you must refresh Redis for your changes to take effect at runtime.

Field	Description
PHONEBOOK_ID	The phone book entry that you want to associate with a particular workzone. References the PHONEBOOK_ID field in the PHONEBOOK table.
WORKZONE_ID	The workzone that you want to associate with the phone book entry. References the WORKZONE_ID field in the WORKZONE table.

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5.20 SCRIPTLOGGING

The SCRIPTLOGGING database table records the date and time that a script reached a particular point.

In the Script Designer, you define the points in each script where logging should occur using the **On enter log text** and **On exit log text** properties.

Field	Description
ID	A unique ID for the record.
UNIVERSE_ID	The universe. References the UNIVERSE_ID field in the UNIVERSE view.
INTERACTION_NO	The interaction record. References the LKTL_CLIENTNO field in the INTERACTION_X table.
AGENTNAME	The username of the agent logged in to Syntelate XA and who was going through the script. References the AGENTNAME field of the SCRIPTLOGGING table.
LOGTEXT	The text logged (as defined in the **On enter log text** / **On exit log text** properties of the Script Designer).
LOG_DT	The date and time at which the script reached this point.
SESSION_ID	

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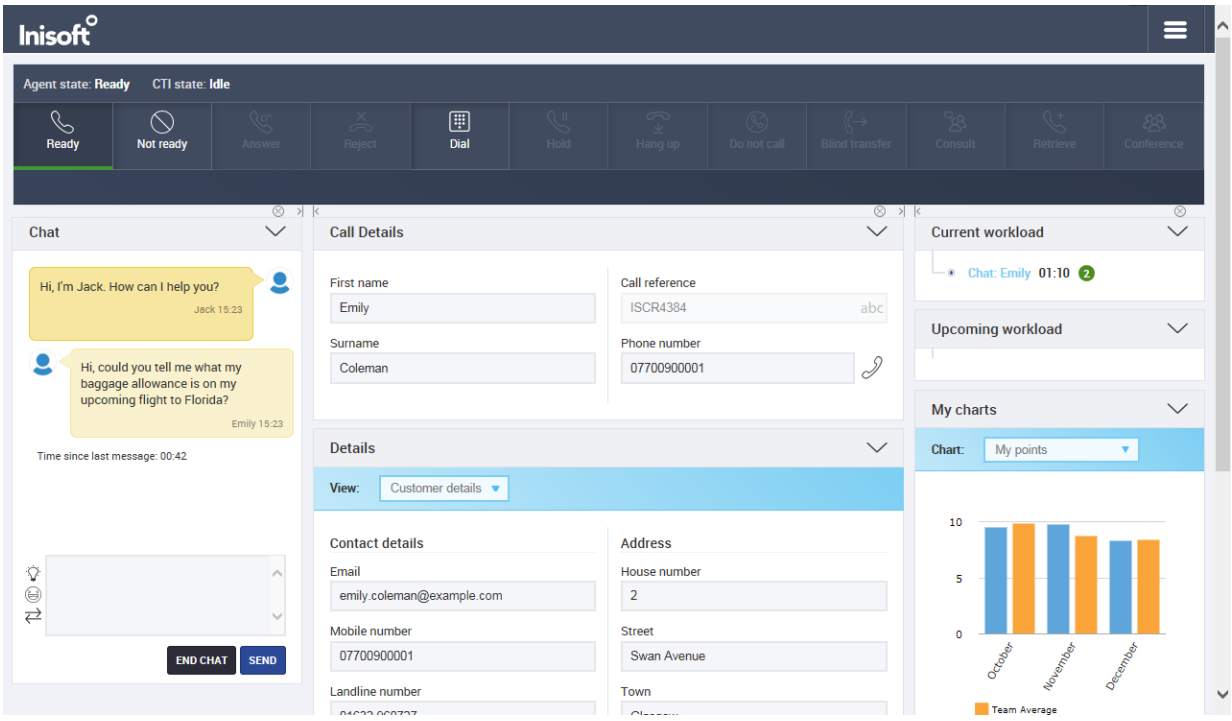
6. Designer

Designer is part of Syntelate XA. Designer is used to create the user interfaces that your agents and supervisors will work from. The Syntelate XA user interfaces are presented in what we call a *desktop*. In Syntelate XA there are three types of desktop:

- Syntelate XA Agent Desktop
- Syntelate XA Configuration Desktop
- Syntelate XA Dashboard Desktop

Use **Designer** to design desktops for agents and supervisors to work from in Syntelate XA.

Here is an example of a Syntelate XA Agent Desktop:



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Designer provides tools for designing the elements that make up desktops: scriptsScript Designer on page 450, data entry elementsData Entry Designer on page 311, gridsGrid Designer on page 425, and actionsAction Builder on page 260.

In addition, Designer includes the Universe Builder, which lets you design your data universe, and the Query Builder, which lets you visually design SQL queries to create database views.

> **Note:** You can restrict user access to Syntelate Designer. Contact the Inisoft Support team at support@inisoft.com if you would like to add the **Designer User Permissions** configuration pane to your Syntelate XA Configuration Desktop.

6.1 Design Time vs Runtime

When you're working in Designer creating or editing desktops and their associated elements, we call this **design time**. When a user is logged in Syntelate XA and working on a particular desktop, this is **runtime**.

6.2 Test and Live Databases

An installation of Syntelate XA usually uses two databases: a **test database** and a **live database**.

> **Note:** A simple deployment of Syntelate XA may use only a single database (the live database). If you're not sure of your setup, contact Inisoft Support at support@inisoft.com.

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Where two databases are used, both the test database and the live database have their own design time and runtime environments. Each of these can be accessed via the appropriate URL:

- **Test design time:** http://your-test-url/Designer
- **Test runtime:** http://your-test-url/Desktop
- **Live design time:** http://your-live-url/Designer (read-only)
- **Live runtime:** http://your-live-url/Desktop

When you create, edit, and update desktops, you do so in the **test design time** environment. You then use the **test runtime** environment to test your changes. You can do this while agents continue to help customers on your **live runtime** environment.

When you're happy with your changes, go to **Version Control** in Desktop Designer to automatically copy your changes from the test database to the live database. The updated desktop can then be used by agents.



Note: There's also a Designer in your live environment (**live design time**), but this Designer is read-only. You'll rarely need to look at this.

On occasion, though, you may be working on updating a desktop and decide it'd be really helpful if you could take a look at how it was *before* you started making your changes. When this happens, just open up Designer in your live environment and take a look.

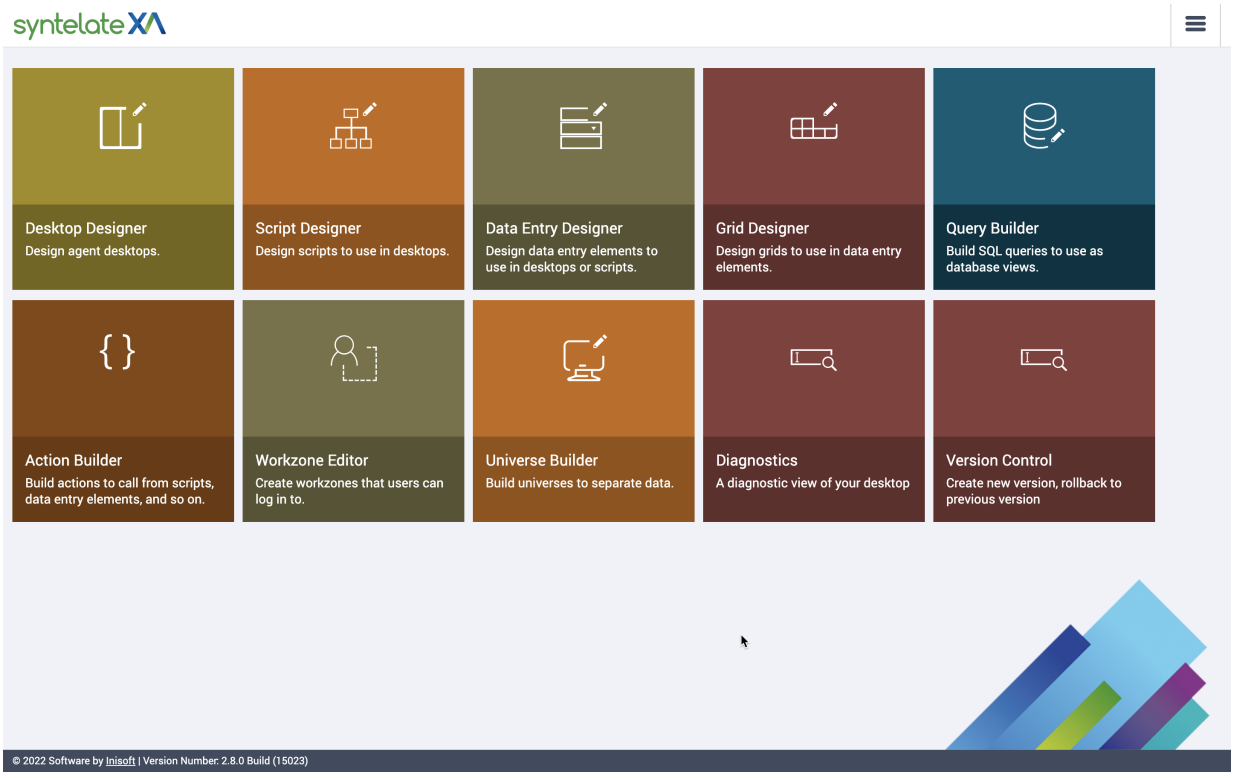
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6.3 General Interface

This section describes the parts of the Designer interface that are common to designing all elements.

6.3.1 Tiles

The tiles on Designer's home page give you access to the features in Designer.



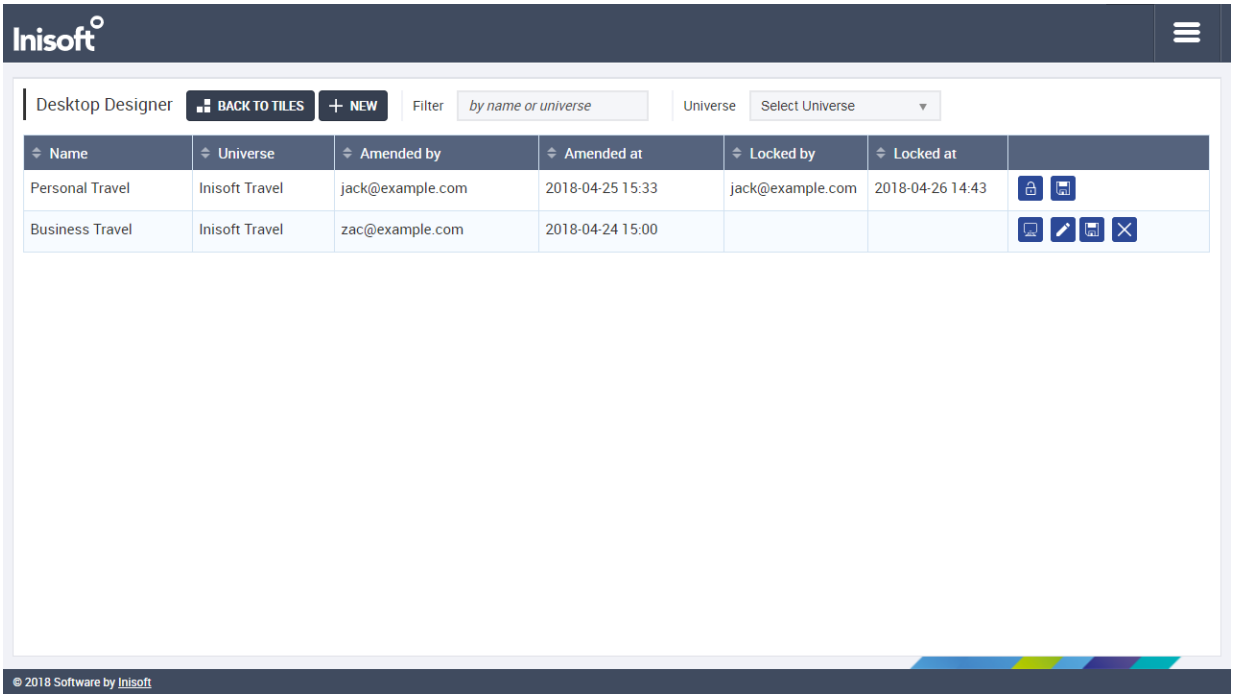
To open a Designer tile, select the tile.

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> **Tip:** We recommend that you start using Designer by opening Desktop Designer.

6.3.2 Element Lists

When you open a tile, you'll see a listing page of existing **elements** (in other words, a list of existing desktops, scripts, and so on).



Here's a description of the listing page:

Options	Description
BACK TO TILES	Return to Designer's tiles.

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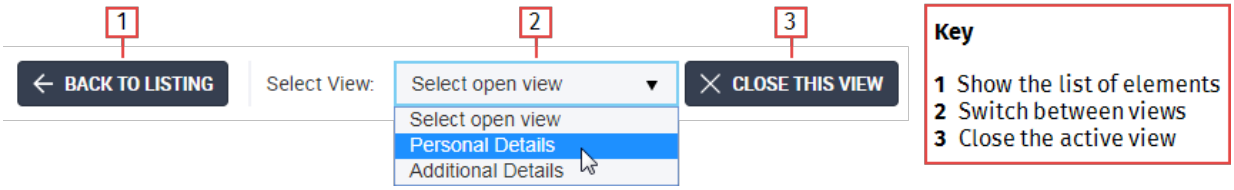
Options	Description
+ NEW	Add a new element.
Filter	Start typing in this box to filter the list of elements shown. This matches on the **Name** and **Universe** fields.
Universe	Filter the list of elements to show only elements for a particular universe.
Select View:	This dropdown is displayed when you have more than one element open. Select an element to view it.
	Design the element.
	Rename the element.
	Unlock the element. Any user can unlock an element locked to any other user.
	Make a copy of the element.
	Delete the element.

6.3.3 Views

When you design an element, it opens as a **view**.

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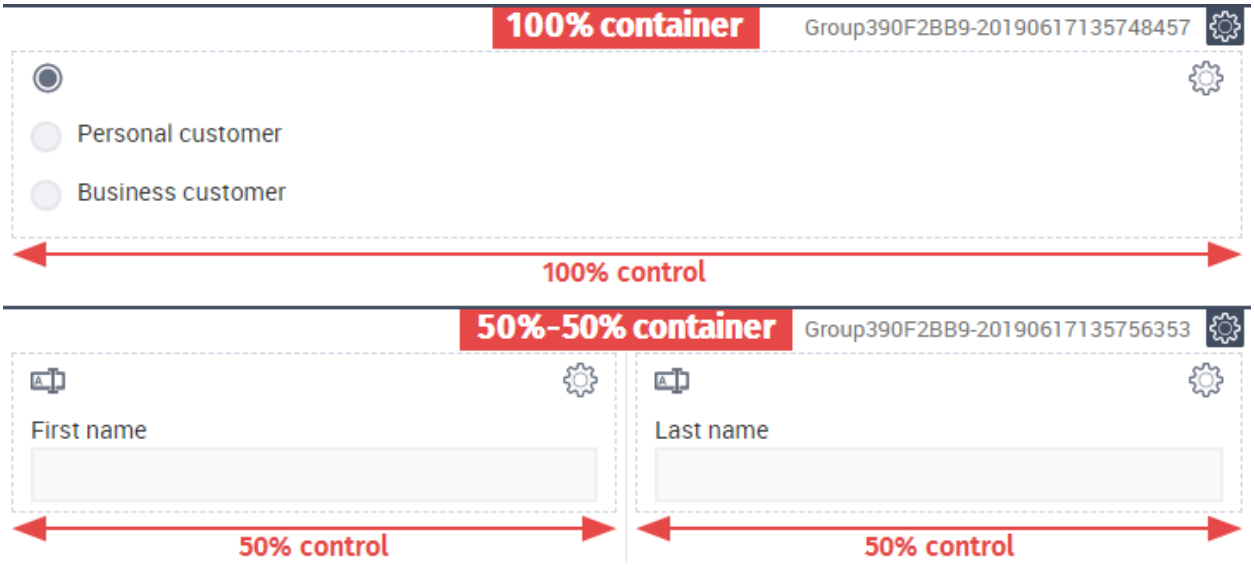
This allows you to work on multiple elements at the same time, and (in the case of desktops and data entry elements) to copy/move controls from one view to another.



6.3.4 Containers

In desktops and data entry elements, controls must be added to a **container**. The container holds the layout of the controls that you add to it.

For example, any controls added to a **100%** container take up the full width of the element. A **50%-50%** container, on the other hand, has two columns of equal width.



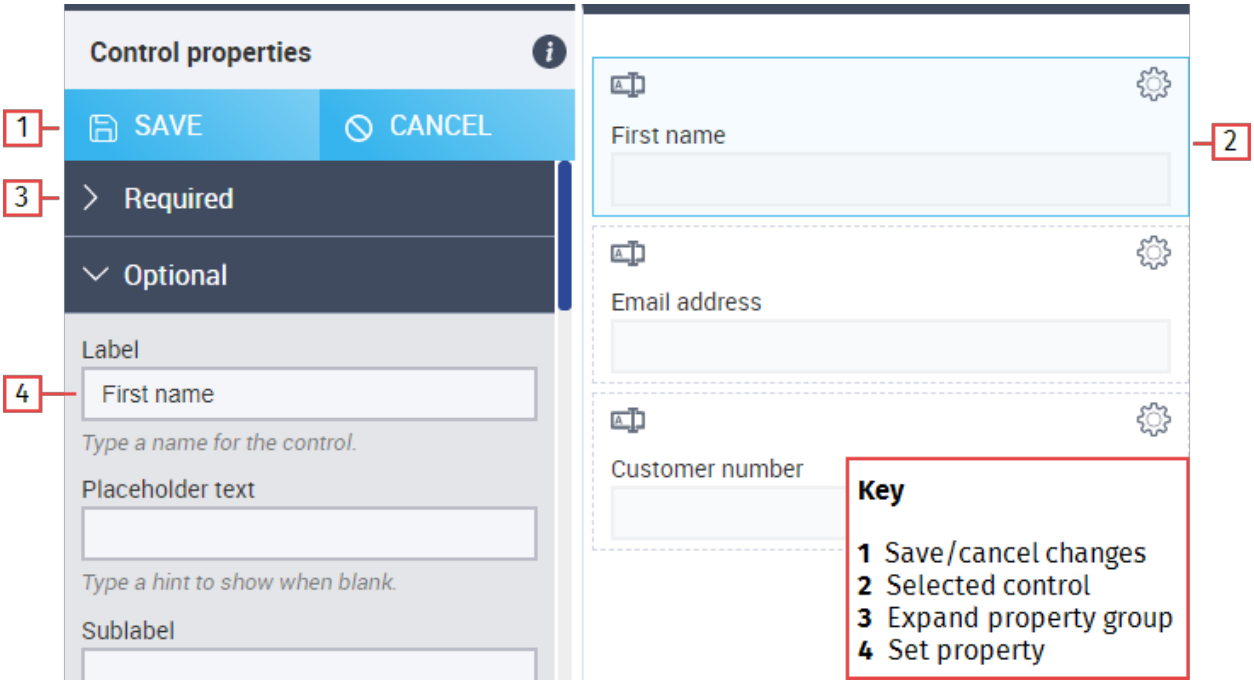
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There are various two-column, three-column, and four-column containers that you can use, each with column widths of different sizes.

> **Note:** As a responsive web application, Syntelate XA automatically adjusts content to fit the size of the user's browser. For this reason, a two-column container, for example, may actually display its content in a single column when viewed on a phone.

6.3.5 Control Properties

In the Desktop Designer, Script Designer, and Data Entry Designer, when you open the **Properties**( ) for a control, the **Control properties** sidebar is displayed. Here is what it looks like in the Data Entry Designer:



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> **Note:** Syntelate XA automatically saves changes when you add, delete, or move a control or container. When you change a control's properties, however, you *must* click **SAVE**.

Properties are organized into three groups:

- **Required:** These properties *must* be set.
- **Optional:** These properties control the look and operation of the control.
- **Actions:** These properties specify the actions that Syntelate XA should perform when the agent, for example, changes the control or gives it focus.

Some controls only have properties in one or two of these groups.

> **Note:** The Grid Designer has a similar section for **Column Properties**.

6.4 Action Builder

Use the **Action Builder** to define actions for Syntelate XA. Syntelate XA actions are written as SQL expressions and can include JavaScript.

The Action Builder provides templates that you can use. Alternatively, you can manually enter queries and functions.

When you've saved your action, it can be assigned to controls on the Syntelate XA Agent Desktop.

> **Tip:** Actions created in one universe cannot be used in another universe.

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6.4.1 Purpose

Actions are used for adding bespoke functionality in Syntelate XA and tailoring the user journeys of both the agent and the customer to fit unique requirements.

Some typical uses of actions include:

- Set a flag in a database field.
- Display sales offers at the right time in a scripted call.
- Remind the agent to provide some missing required details.
- Send an auto-reply email when an outbound call isn't answered.

6.4.2 Example

Jack, an agent at Inisoft Travel, is on a call with a customer about booking a holiday. When the customer indicates that they have an issue with the cost, Syntelate XA automatically shows Jack information about offers and discounts.

Inisoft Travel created an action with a single step of type **select tab**. This step type activates a particular tab of a tabbed data entry element, in this case the **Offers and discounts** tab.

In the Script Designer, Inisoft Travel set this action to run when the script enters the **Inisoft Travel Cost** script box.

Visit the Action Builder section of the Online Help to watch a video demonstrating this example.

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6.4.3 Adding an Action

There are two ways to approach creating actions:

- Create a new action.
- Copy an existing action and edit according to your needs.

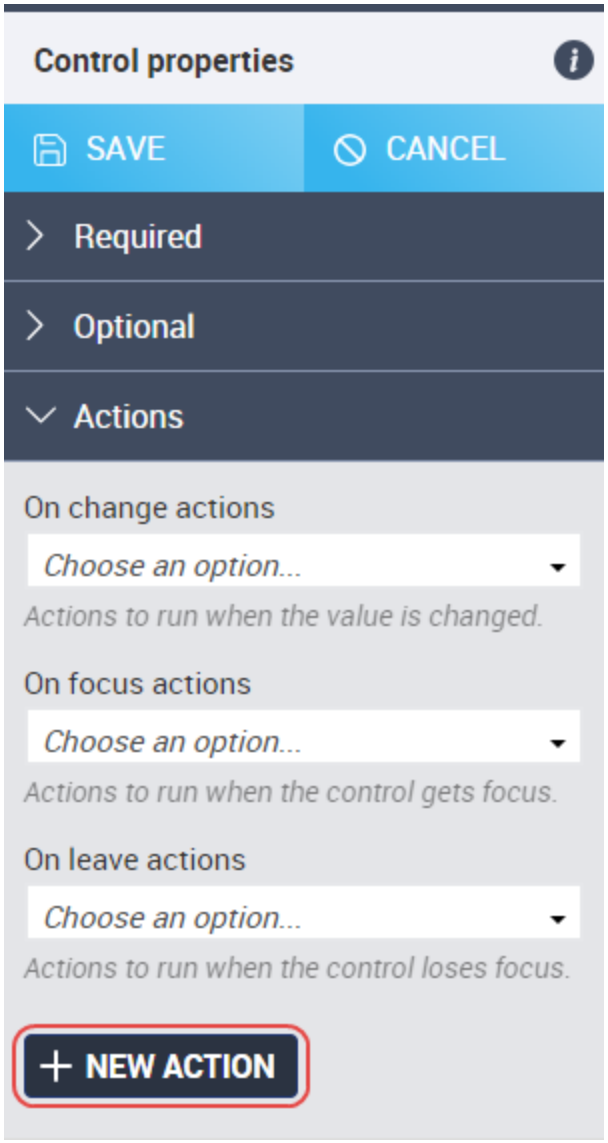
6.4.3.1 From A Desktop Control

Often the easiest way to add a new action is from the data entry element, script, or other desktop control in which you'll use the action. To do this, follow these steps:

1. From the **Control properties** of the control where you want to add the action, click **NEW ACTION**.

   The following example shows this for a text box control in the Data Entry Designer:

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2. In **Name**, type a name for the action.
3. From the universe dropdown, select the universe which the action will be saved to. (Remember that the universe is your data source.)
4. Click **SAVE**.

Syntelate XA asks you if you want to view the new action.

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If you choose **Yes**, you see **Action Builder** open.

If you choose **No**, you are returned to **Data Entry Designer** and will see the new action listed under **Actions** in **Control Properties**.

> Tip: You can open any action attached to a control by expanding **Actions** in **Control Properties** and clicking on the action's name.

6.4.3.2 From the Action Builder

Adding New Actions

To add a new action from the Action Builder, follow these steps:

1. Open **Action Builder**.
2. On the listings page, click + NEW. The **Add Action** dialog is shown.
3. In the **Name** box, type a name for the action.
4. In the **Universe** dropdown, select the universe to which this action should be added.
5. Click SAVE.
6. You see **Action Builder** screen. Here, you can add the steps required to create your action.

When you are finished, click CLOSE THIS VIEW to return to the listings page.

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Copying Existing Actions

To copy an existing action from the Action Builder, follow these steps:

1. Open **Action Builder**.
2. From the listings page, click **Save As**  . The **Add Action** dialog is shown.
3. In **Name**, type a name for the action.
4. From the **Universe** dropdown, select the universe to which this action should be added.
5. Click 

. You are returned to the listings page where you see a success message. You also see the copied action, ready for you to edit.
6. Click on **Design**  to see and edit the action's settings. The **Action Builder** opens.
7. After you have made any required changes, save the action.

6.4.4 Action Builder

Use the **Action Builder** to define actions for Syntelate XA. Syntelate XA actions are written as SQL expressions and can include JavaScript.

The Action Builder provides templates that you can use. Alternatively, you can manually enter queries and functions.

When you've saved your action, it can be assigned to controls on the Syntelate XA Agent Desktop.

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Tip: Actions created in one universe cannot be used in another universe.

6.4.4.1 Purpose

Actions are used for adding bespoke functionality in Syntelate XA and tailoring the user journeys of both the agent and the customer to fit unique requirements.

Some typical uses of actions include:

- Set a flag in a database field.
- Display sales offers at the right time in a scripted call.
- Remind the agent to provide some missing required details.
- Send an auto-reply email when an outbound call isn't answered.

6.4.4.2 Example

Jack, an agent at Inisoft Travel, is on a call with a customer about booking a holiday. When the customer indicates that they have an issue with the cost, Syntelate XA automatically shows Jack information about offers and discounts.

Inisoft Travel created an action with a single step of type **select tab**. This step type activates a particular tab of a tabbed data entry element, in this case the **Offers and discounts** tab.

In the Script Designer, Inisoft Travel set this action to run when the script enters the **Inisoft Travel Cost** script box.

Visit the Action Builder section of the Online Help to watch a video demonstrating this example.

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6.4.5 Step Types

This section describes the different types of action step.

6.4.5.1 Assign value

Use **assign value** to set the value of a database field.

This uses the same interface as the Calculation Builder. The assignment operator is `=`. As such, your assignment statement will look like: `[TABLE.FIELD] = 1`.

For a string field, remember to put the value between ' and ': `[TABLE.FIELD] = 'value'`.

6.4.5.2 Call web service

Use **call web service** to make a call to a web service.

For example, you could create an action that contacts a postal company's web service to validate customer postcodes entered on the agent desktop.

6.4.5.3 Change CSS

Use the **change css** step type to:

- Change the label color of a data entry control (“color”).
- Show/hide a data entry control (“display”).

For “color”, you can type a word like “red”, a HEX value, an RGB value, an RGBA value, an HSL value, or an HSLA value. For more information, see https://w3schools.com/cssref/pr_text_color.asp.

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For “display”, you can type “block” to show the data entry control or “none” to hide the control. However, it’s a lot easier to just use the **Set invisible** step type: see Set invisible on the next page.

6.4.5.4 Insert grid row

Use the **insert grid row** step type to add a new blank row to a specified grid.

6.4.5.5 Insert snippet

Use the **insert snippet** step type to insert a snippet into a HTML editor of a data entry element.

For example, to manage scenarios where a customer doesn't answer an outbound call, you can configure the outbound script to generate a follow-up email automatically. The content of the email can be provided by an **Insert snippet** action.

6.4.5.6 Reload grid data

Use the **reload grid data** step type to reload the data in a specified grid.

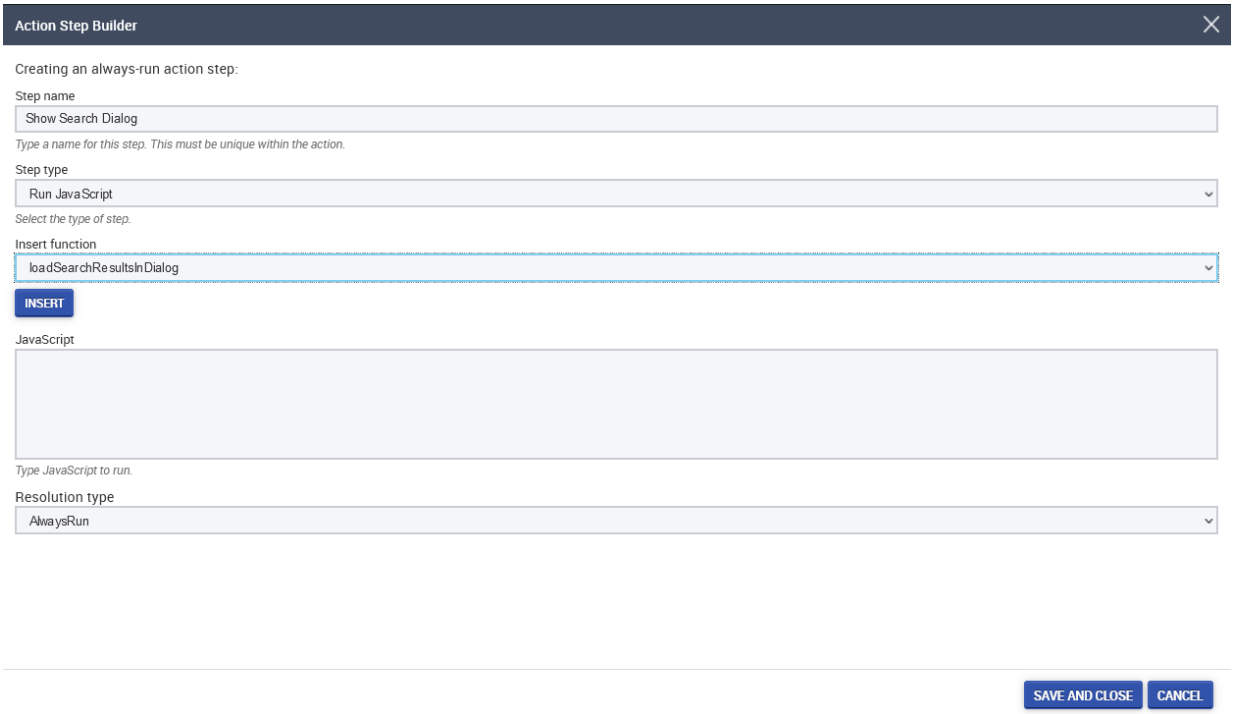
Where the grid’s data source object has been updated, Syntelate XA will update the grid to reflect this.

6.4.5.7 Run JavaScript

Use **run JavaScript**to run scripts. There are two ways to insert the script:

- Choose one of the commonly used functions from the **Insert function** dropdown; or
- Manually enter the script into the box provided.

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This is an advanced feature to be used only by users familiar with JavaScript.

6.4.5.8 Select tab

Use the **select tab** step type to activate a particular tab of a tabbed data entry element.

6.4.5.9 Set invisible

Use the **set invisible** step type to make a control within a data entry element either invisible or visible.

When a control is invisible, agents cannot see it.

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6.4.5.10 Set read-only

Use the **set read-only** step type to make a control within a data entry element either read-only or not read-only.

When a control is read-only, agents cannot edit the value of that control.

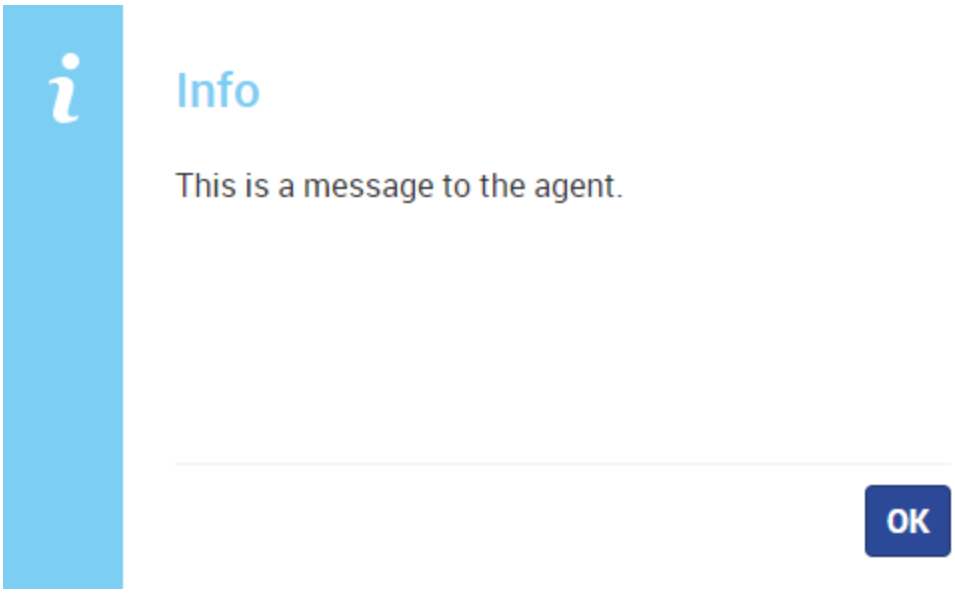
6.4.5.11 Set required

Use the **set required** step type to make a control within a data entry element either required or not required.

When a control is required, agents most populate it before they can close the interaction record.

6.4.5.12 Show message

Use the **show message** step type to display a message in a dialog.



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6.4.5.13 Stop completion

Use the **stop completion** step type to stop the completion of an interaction record.

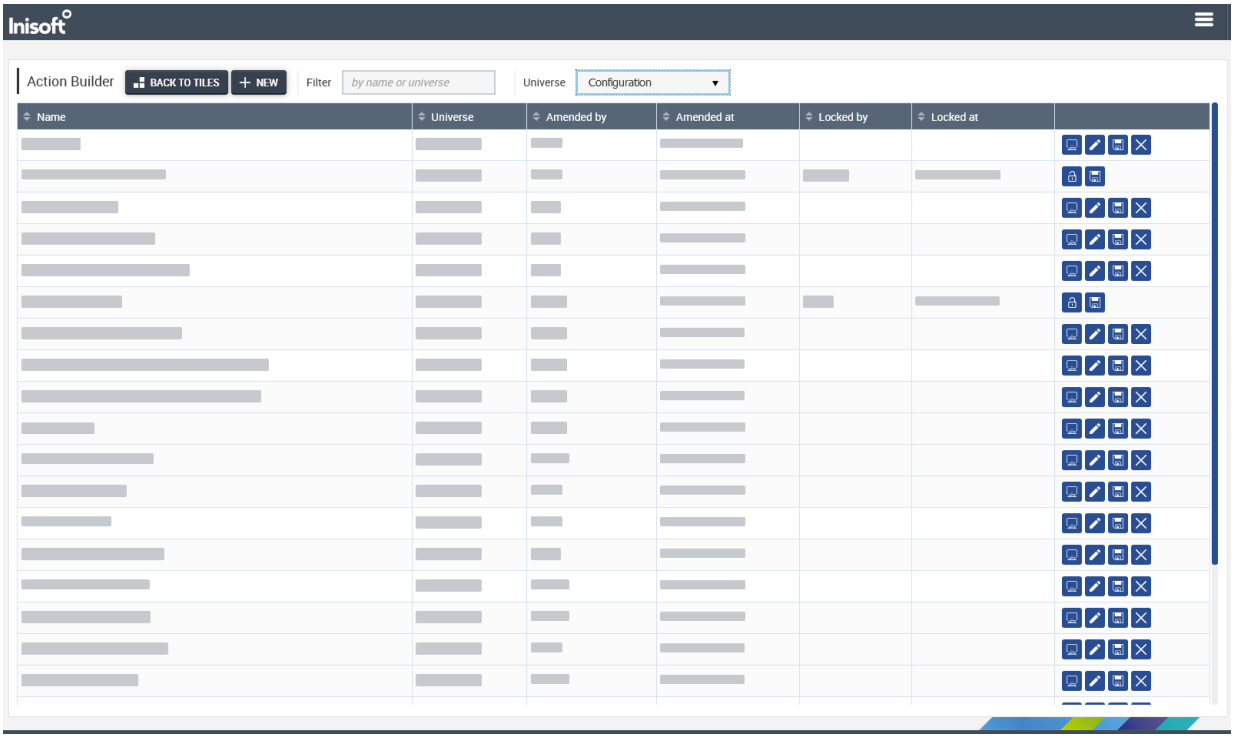
You'd typically use this in an action called from a completion button. In the action, you'd check whether certain conditions have been met: say that *either* this field has been populated *or* that field. In the steps to run when condition is false, you'd add the stop completion step.

6.4.6 The Interface

6.4.6.1 Listing Page

Action Builder's listing page lists the actions that have been created by all users, in all universes. The toolbar provides a button to create new actions, and options for filtering and restricting the list.

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For each action, the grid shows you:

- **Name**: The name of the action.
- **Universe**: The universe it belongs to.
- **Amended by**: Who last modified it.
- **Amended at**: When it was last modified.
- **Locked by**: If the action is locked for editing, this shows you who locked it.
- **Locked at**: When the action was locked.

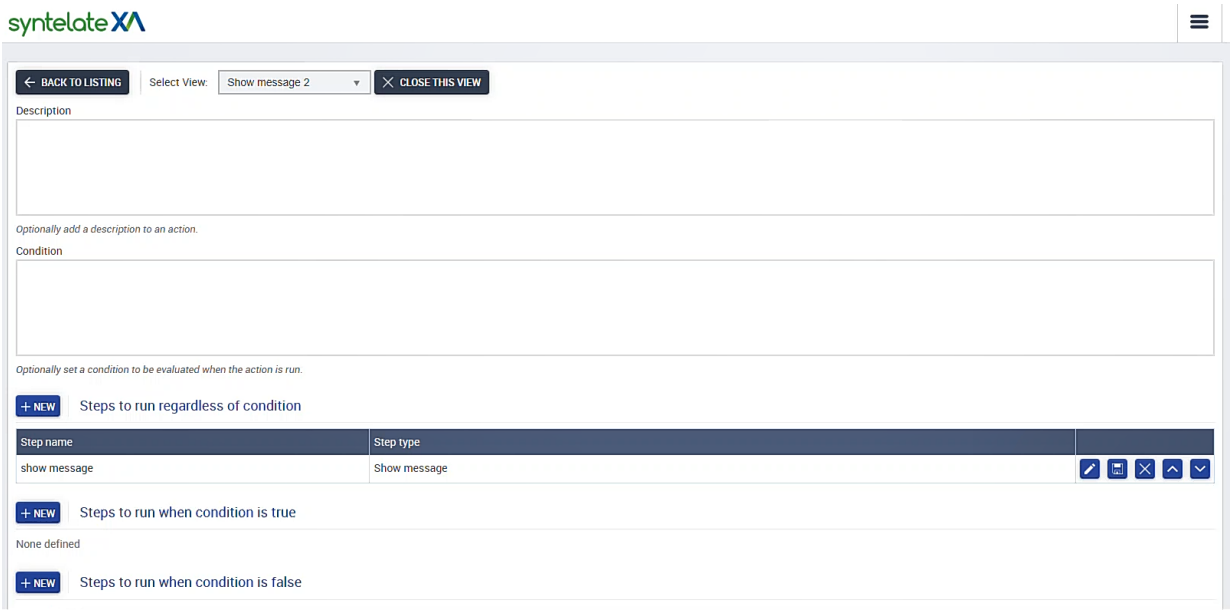
Each action can be unlocked, viewed, edited, copied or deleted.

Note: See Unlocking an Element on page 351 for advice on locked elements.

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If you create a new action or view an existing one, you will see **Action Builder**.

6.4.6.2 Action Builder



The **Action Builder** toolbar provides options for closing the builder, choosing an action to view (if you have more than one open), and returning to the listing page.

Below the toolbar are options for describing the action and for defining the steps that the action will follow.

Description

You can choose to provide a description of the action by entering a note in the **Description** box. For example, you might want to describe what the action does. The **Description** box supports regional and special characters.

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Conditions

You can choose to make an action dependent on a condition.

You add a condition using **Calculation Builder**. Calculation Builder opens automatically when you click inside the **Condition** box. For guidance on writing conditions, see Calculation Builder on page 492.

Syntelate XA evaluates the condition when the action is run.

If you have added a condition, then you need to add steps for Syntelate XA to follow either when the condition is true or when it's false.

Action Steps

An action is comprised of one or more steps. The steps are organized into the following three groups that Syntelate XA runs in this order:

1. **Steps to run regardless of condition**: These steps are always run and they run first. After running these, or if there is no step defined here, Syntelate XA checks the next step.
2. **Steps to run when condition is true**: If there is a condition on the action and it's evaluated as true, any steps defined here will be run. If there are no steps defined here then Syntelate XA checks the next step.
3. **Steps to run when condition is false**: If there is a condition on the action and it's evaluated as false, any steps defined here will be run. If there are no steps defined here then the action ends at this point.

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Actions Without Conditions

If your action doesn't have a condition, then add steps to **Steps to run regardless of condition** and ignore the other step groups.

Actions With Conditions

If you have specified a condition, you can add steps to run regardless of the condition, but you must as a minimum add steps to run when the condition is either true or false.

Action Step Buttons

You can manage action steps using the buttons provided.

Button	Description
	Open Action Step Builder to edit the step. Or, to view it.
	Save a copy of the step under a different name.
	Delete the step.
	Move the step down one row within this group. Only used when there are multiple steps in the group.
	Move the step up one row within this group. Only used when there are multiple steps in the group.

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6.4.6.3 What's Next?

Learn about the different types of action step:

- Step Types on page 262

6.5 Data Entry Designer

Use the **Data Entry Designer** to design data entry elements for Syntelate XA.

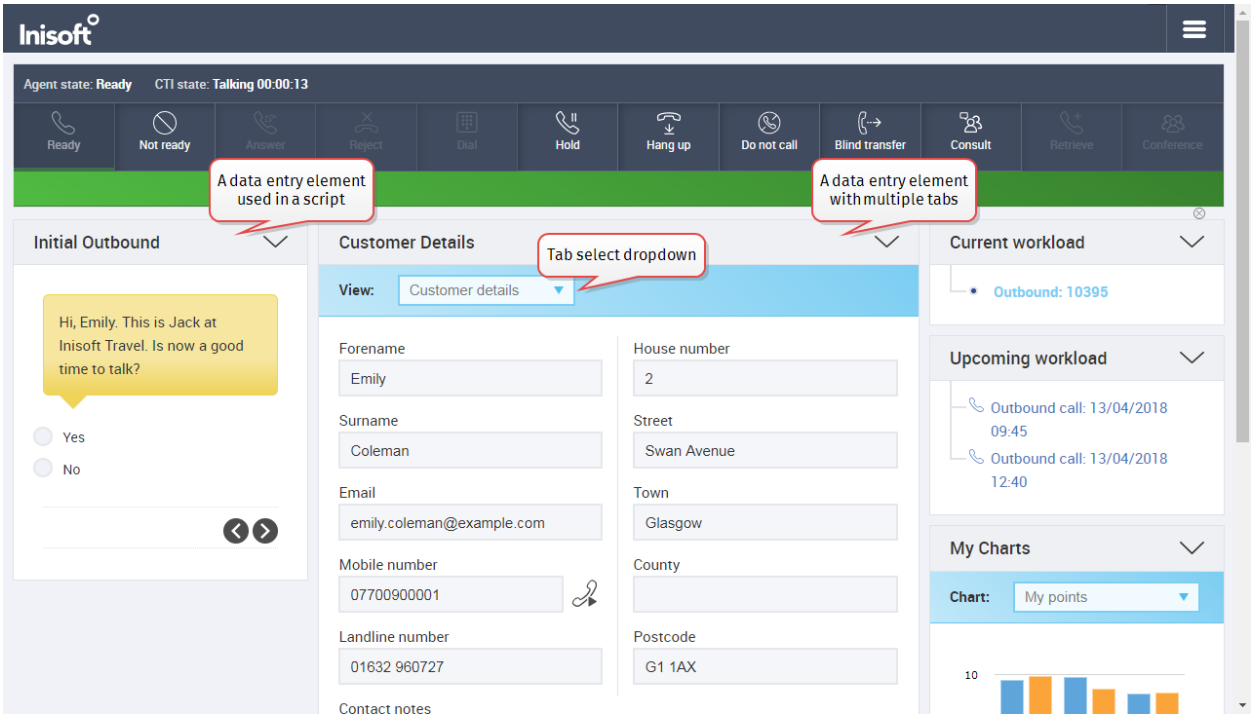
6.5.1 What's a Data Entry Element?

A **data entry element** is a form that consists of one or more **data entry controls** (such as text boxes, radio buttons, grids, and so on). Agents use data entry elements to enter and/or view information.

You can add a data entry element to a desktop directly. Additionally, each page of a script is actually a data entry element.

The following screenshot shows data entry elements in Syntelate XA:

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6.5.2 Adding a Data Entry Element

There are two ways to add a new data entry element.

6.5.2.1 From a Desktop or Script

The easiest way to add a new data entry element is from the desktop or script in which you'll use the data entry element. To do this, follow these steps:

1. Drag a data entry element control onto the desktop or script.
2. Click ⚙ and then **Properties**.
3. Under the **Element name** property, click + NEW.

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4. In the **Name** box, type a name for the data entry element.
5. Click **SAVE**.

The data entry element is added to the same universe as the desktop or script.

6.5.2.2 From the Data Entry Designer

You can also add a new data entry element directly from the Data Entry Designer. To do this, follow these steps:

1. In the list of data entry elements, click 

. The **Add Data Entry Element** section is shown.
2. In the **Name** box, type a name for the data entry element.
3. In the **Universe** dropdown, select the universe to which this data entry element should be added.
4. Click 

.

6.5.3 Data Entry Controls

This section describes the controls that you can add to a data entry element.

Some properties are common to many data entry controls. These are described in Common Properties on page 302 rather than under each control.

Action properties are not described here. These run one or more actions at a particular time, such as when a control is given focus or its value is changed. For more information about actions, see the section Action Builder in *Syntelate XA - Designer*.

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6.5.3.1 Heading



Use a **heading** control to add a heading to a data entry element.

Property	Description
Text	Defines the heading text to show in Syntelate XA. Click the **Text** box to show the heading editor, where you can type the text that you want to show and also insert references to database fields.
Heading style	Defines the type of heading, from **h2** (most important) to **h4** (least important). For more information about headings in HTML, see https://www.w3schools.com/html/html_headings.asp.
Add trailing border?	Adds a border beneath the heading. H2 with trailing border

6.5.3.2 Text

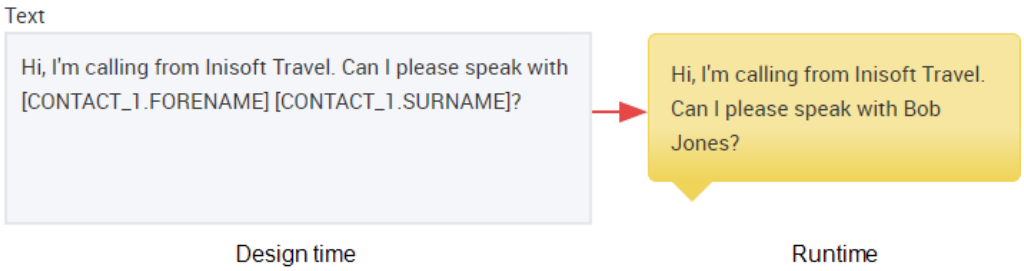


Use a **text** control to show read-only text to agents in Syntelate XA.

For scripts, use this to add **speech** (text that the agent should read out to the customer) and **instructions** (instructions to the agent to take particular actions).

Property	Description
Text	Defines the text to show in Syntelate XA. Click the **Text** box to show the text editor, where you can type the text that you want to show and also insert

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Property	Description
	references to database fields. 
Text type	Defines whether the text is standard text, speech, or an instruction. At runtime, speech and instructions look different to standard text. 

6.5.3.3 Text box

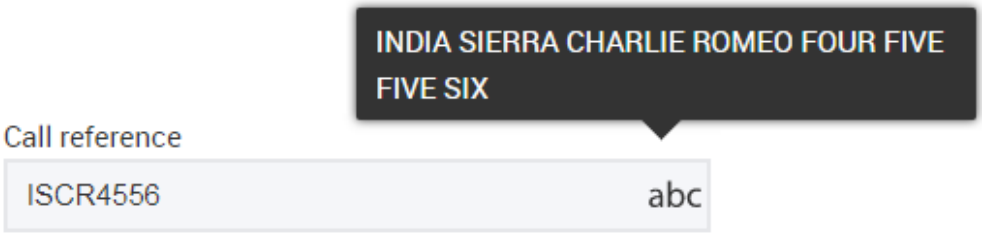


A **text box** is a single-line box for entering or displaying text.

As well as strings, use a text box for phone numbers, dates, and date and time fields.

Property	Description
Masked?	Hides the text box's value (by showing each character as •, as for a password input box).
Show	Shows the abc icon inside the text box. The agent can hover over this to see

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Property	Description
Phonetic Alphabet icon?	the text box's value displayed in the NATO phonetic alphabet. 
Text box type	Where the text box will contain a specific type of data, such as a date, phone number, or email address, select the appropriate option. Otherwise leave this property blank. » **Date:** Adds a date picker to the text box. » **DateTime:** Adds a date and time picker to the text box. » **Dtmf:** Shows the button beside the text box. The agent can click this to dial the phone number in the text box. Use, for example, where agents must dial a particular phone number before taking credit card details (so as to pause recording). DTMF stands for dual-tone multi-frequency. » **EmailAddress:** Validates the text box to ensure that it is either blank or in the format *local-part@do.main*. Where an agent tries to complete the record and this field is invalid, Syntelate XA prevents completion and highlights the field for correction. » **PhoneNumber:** Shows the or button beside the text box. The agent can click this to dial the phone number. Also prevents the agent

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Property	Description
	• from entering any characters other than numbers and the + symbol. • **PhoneNumberText:** Prevents the agent from entering any characters other than numbers and the + symbol. *Doesn't* show the  or  button beside the text box.
Dial on click?	Defines whether Syntelate XA should dial the phone number as soon as the agent clicks the button () or whether Syntelate XA should instead pass the phone number to the **Dial** window (). This property only shows if you select **PhoneNumber** for **Text box type**.
Maximum characters	Restricts the amount of content that the agent can type to the specified number of characters.
Include copy button?	Shows the  button beside the text box. The agent can click this to copy the text box's value to the clipboard. The agent can then paste this to another field in Syntelate XA or else to a separate application.
Printing group	Used in conjunction with an action button where you want agents to be able to print information shown on their desktop. For example, let's say you want your agents to be able to print a customer email. You want both the subject (held in a text box control) and the email body (held in an HTML editor control) to be included in the printout. In this case, you'd set the **Printing group** property of both controls to something like **messagePrint**.

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Property	Description
	Next you'd need to add an action button control, give it a label like **Print**, and make it call an action with the following step: » **Step type:** Run JavaScript » **JavaScript:** `printGroupOfControls('messagePrint');`
Show controls side by side?	Where you set this property, the width of the control will be set to 50% of the container column. If this control is followed by another control that also has this property set, they'll be shown side by side at runtime. Where this property is set, the **Label alignment** property will automatically be overridden to **Top**. At runtime, if the container column is too narrow, Syntelate XA may disregard this property and show the control at full width.

6.5.3.4 Multiline text box



A **multiline text box** is a multiline box for entering and/or displaying text.

Property	Description
Rows	Defines the height of the multiline text box in terms of number of lines. If the control's value runs to more lines than this, a scroll bar appears on the control.
Maximum characters / Maximum	Restricts the amount of content that the agent can type.

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Property	Description
words	
Minimum characters / Minimum words	Forces the agent to type *at least* the specified number of characters/words.
Show controls side by side?	Where you set this property, the width of the control will be set to 50% of the container column. If this control is followed by another control that also has this property set, they'll be shown side by side at runtime. Where this property is set, the **Label alignment** property will automatically be overridden to **Top**. At runtime, if the container column is too narrow, Syntelate XA may disregard this property and show the control at full width.

6.5.3.5 Dropdown



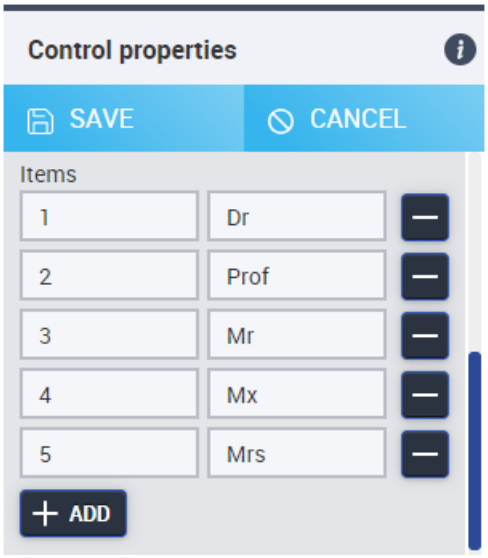
A **dropdown** allows an agent to select an item from a list of options.

Use dropdowns when there are a lot of items to display.

When five items or more are listed, the dropdown automatically becomes searchable.

Property	Description
Items	Determines the items that are displayed in the dropdown.

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Property	Description
	 For each item, the first box defines what is stored in the database field when this item is selected. And the second box defines the text that is displayed in the dropdown. Click + ADD to add an item or — to delete an item. **Enable searching:** Add five items or more to enable searching. When searching is enabled, at runtime the end user can search the dropdown. The search logic is "contains". For example, if a user searches for "ap", Syntelate XA will match any item in the dropdown that contains "ap". The search is not case sensitive.
Show controls side by side?	Where you set this property, the width of the control will be set to 50% of the container column. If this control is followed by another control that also has this property set, they'll be shown side by side at runtime. Where this property is set, the **Label alignment** property will automatically be

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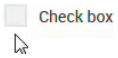
Property	Description
	overridden to **Top**. At runtime, if the container column is too narrow, Syntelate XA may disregard this property and show the control at full width.

Note: You can also add a dropdown whose values are populated from a data source object such as a database table. For more information, see Grid on page 284 (property: **Display as select list?**).

6.5.3.6 Check box



A **check box** allows an agent to make a binary selection (the check box is either selected or not selected).



Property	Description
Default to checked?	Selects the check box by default.

Note: A check box can write the following values to a database field:

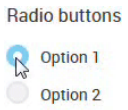
- **null:** The check box was never selected.
- **0:** The check box was cleared by the agent. In other words, it *was* selected (perhaps by the **Default to checked?** property) but the agent cleared this.
- **1:** Check box selected.

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6.5.3.7 Radio buttons



Radio buttons let agents click one option from a list of options. Use radio buttons when there are only a few options to select from.

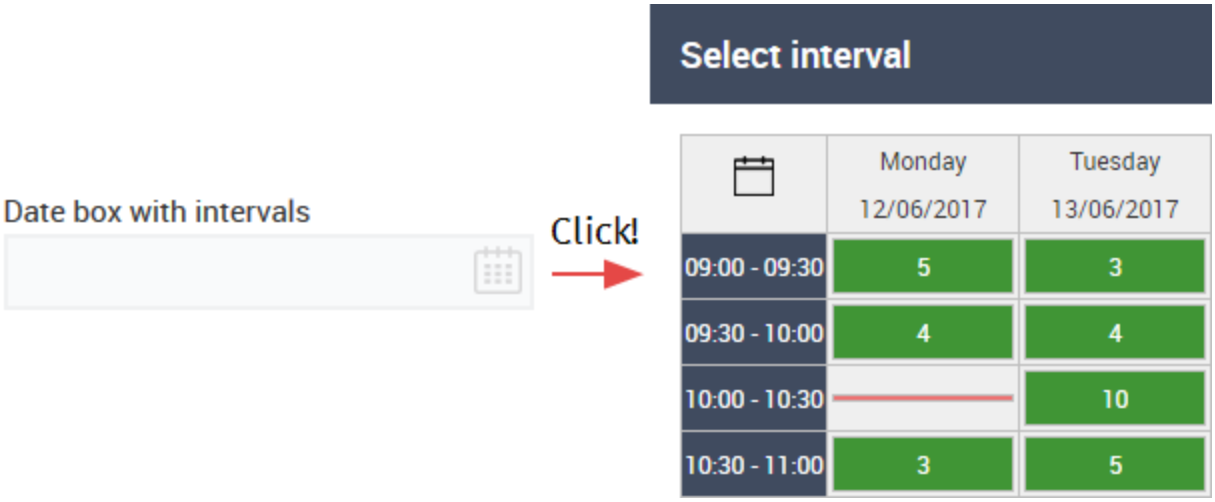


Property	Description
Items	Defines the available options. For each item, the **Value** is what is stored in the database field when this item is selected, and the **Text** is what is displayed to the agent beside the radio button. Click + ADD to add an item or — to delete an item.
Display "Other"?	Lets agents select an **Other** radio button and then type their own value into a text box. If you use this property, you must complete the following related properties: » **Value for "Other"**: The value to write to the radio buttons database field when the agent clicks **Other**. » **Table name for "Other"**: The database table to store the agent's entered value to. » **Field name for "Other"**: The database field to store the agent's entered value to.
Spread to columns?	Displays the radio buttons in columns rather than one below the other.

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6.5.3.8 Date box with intervals

A **date box with intervals** lets an agent select an interval (time slot) for, say, a customer callback.



Property	Description
Interval group	Defines the interval group to use with the control. Leave this blank to use the interval group associated with the workzone or else select a specific interval group. To manage interval groups, use the Interval Manager. For more information, see document *Syntelate XA - Interval Manager*.

6.5.3.9 Calculation

A **calculation** lets you perform a calculation, for example calculating the customer's age using their date of birth.

Calculations can be performed on numbers, dates, and strings.

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Property	Description
Expression	Defines the expression to use for the calculation. Click the **Expression** box to show the Calculation Builder, where you can build up your expression by inserting one or more functions as well as references to database fields. For more information, see the section on Calculation Builder in *Syntelate XA - Designer*.

Note: For calculations, the **Table name** and **Field name** properties are optional. This lets you display the result of a calculation in Syntelate XA without storing it in a data source object.

6.5.3.10 Grid



A **grid** is a table that is linked to a data source object in your universe. As well as displaying data from this data source object, agents can use grids to add, update, and delete records in the data source object.

You design grids using Grid Designer. But you can also create new grids from the Data Entry Designer, and view existing grids.

Booking history

Destination	Departed	Returned	Adults	Children
Aspen, Colorado	07/01/2017	08/01/2017	2	0
Orlando, Florida	06/08/2016	20/08/2016	2	0

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Property	Description
Grid name	Defines the grid to use. Click  to create a new grid. You'll have the option to open and start editing it straightaway.
Restrict height?	If **No**, the grid's height extends to show all records. If **Yes**, the grid has a maximum height (set by the **Maximum height** property). Where more records show in the grid than can be displayed within this height, the agent can scroll to view all records.
Maximum height	Defines the height of the grid in pixels. Only shows if **Restrict height?** is **Yes**.
Auto-load?	Defines whether data should be loaded into the grid when the page is loaded.
Enable linked data?	Only relevant where the grid's data source is a stored procedure. If **Yes**, a copy of the data is stored on the client. This is only needed where other controls are linked to the data source used by the grid.
Allow export?	Shows an **Export** button that the agent can click to export the grid's data as an Excel workbook.
Display as select list?	Displays a dropdown (not a grid). The values of this dropdown come from the grid's data source object. This must contain columns with the following names: » itemValue

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Property	Description
	• itemDescription
Grid style	Defines the visual style of the grid. Choose from: • **Default**: Table headers have dark gray shading, all cells have a light gray solid border, alternate rows have pale blue shading. • **Simple**: No borders or shading. • **Attachments**: For email only. Choose this when you need to provide a place for agents to upload and see email attachments.
Show waiting message?	Shows a waiting animation when the results are being retrieved.

6.5.3.11 HTML editor



The **HTML editor** is used by agents to compose outbound emails. The text that an agent enters in the **HTML editor** is stored in the database in HTML format.

> **Note:** If you need to store email transcripts in plain text, see the **Store plain text?** option in Adding an Email Message Gateway, in the document *Syntelate XA - Message Gateway Configuration*.

You can provide a text formatting toolbar on the **HTML editor** by enabling the **Show formatting options?** property.

You can also enable snippets, which are chunks of content that agents can insert into an email.

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> **Note:** The HTML Editor is a third-party plugin called TinyMCE.

Rewriter

Rewriter is an AI rewriting service that improves an agent's words by rewriting them in a professional and formal style. **Rewriter** can be used with email and chat. In email, it's accessed using the **Rewriter** button on the HTML Editor toolbar.

With emails, agents use **Rewriter** by selecting some text in their email message and clicking the **Rewrite** button. A dialog is then displayed that presents the agent with one or more suggested replacements for the selected text. The agent can choose to either accept one of the suggestions or decline them. The dialog closes, and if the agent has selected a replacement, it's automatically applied to the message body.

Rewriter can be added to your HTML Editor on request and requires the purchase of a Syntelate XA Rewriter license.

> **Note:** If you would like information on pricing, contact us at sales@inisoft.com and tell us about your requirements.

The configuration of **Rewriter** is managed on your behalf by an Inisoft consultant.

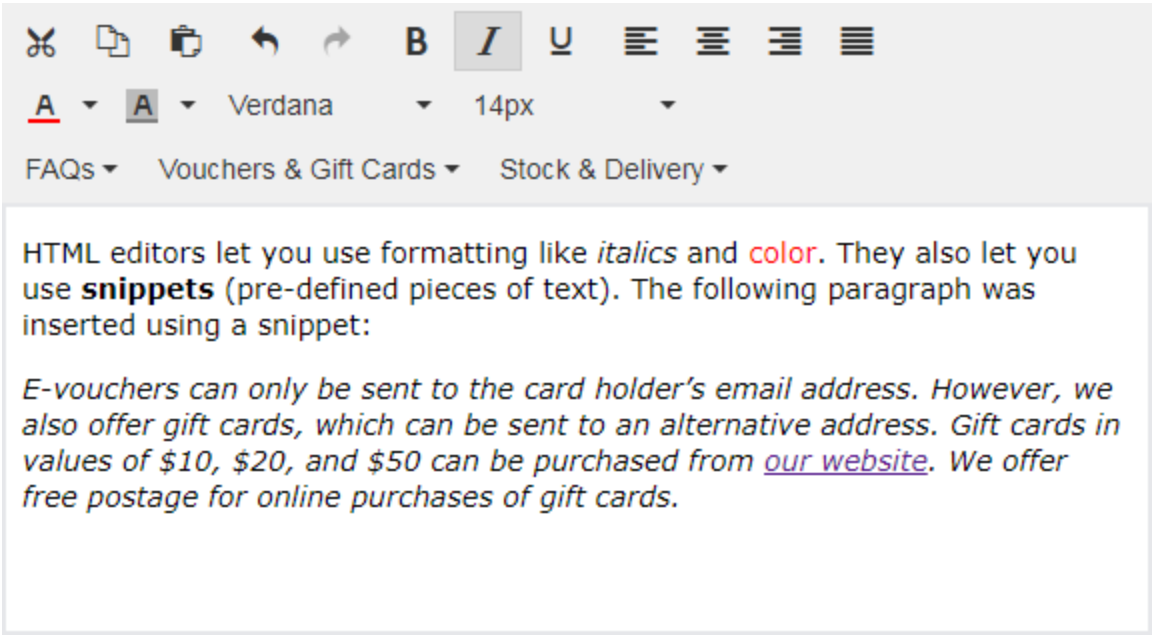
Track Changes

The HTML Editor can be set to track changes. Track changes can be enabled or disabled with the following configuration key:

`<add key="flitePluginEnabled" value="false" />`.

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You will find that key in the appsettings.config file that's in the Agent Desktop directory. After you edit the app setting, you need to publish the HTML Editor in Data Entry Designer to complete the process.



Tip: As well as the toolbar, agents can use keyboard shortcuts such as Ctrl+Z for undo or Ctrl+B for bold.

Note: For an email or outbound SMS, write to the LKTL_MESSAGE field of the INTERACTION_X_NEWMESSAGE table. The Outbound Gateway service will then pick this up and send the email/SMS to the customer.

Property	Description
Height	Defines the height of the control in pixels.
Show edit	Shows the cut, copy, paste, undo, and redo buttons in the toolbar.

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Property	Description
options?	
Show formatting options?	Shows the bold, italics, underline, alignment, color, and font buttons in the toolbar.
Show snippets?	Shows snippets in the toolbar. You must select a snippet group.
Snippet group	Defines the snippet group to use. Only shows if the **Show snippets?** property is set to **Yes**. **Note:** You can assign a snippet group to a mailbox or an agent group instead of to an HTML Editor. If you would like more information on those options, ask your Inisoft consultant or contact the Inisoft Support Desk at support@inisoft.com.
Printing group	Used in conjunction with an action button where you want agents to be able to print information shown on their desktop. For example, let's say you want your agents to be able to print a customer email. You want both the subject (held in a text box control) and the email body (held in an HTML editor control) to be included in the printout. In this case, you'd set the **Printing group** property of both controls to be something like **messagePrint**. Next you'd need to add an action button control, give it a label like **Print**, and make it call an action with the following step:

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Property	Description
	» **Step type:** Run JavaScript » **JavaScript:** `printGroupOfControls('messagePrint');`

6.5.3.12 Save and close button



A **save and close button** lets an agent:

- Save and close an interaction record.
- Edit an interaction record that they are viewing (via the **Use edit mode?** property).
- Cancel changes to an interaction record (via the **Include cancel button?** property).



Tip: Use a **save and close button** when:

- The agent manually creates a new interaction record.
- The agent manually opens an existing interaction record and optionally makes changes to that record.

Use a **completion button** when the agent is pushed a record to work on (a call, a chat, an email, and so on).

Property	Description
Include cancel button?	Adds a cancel button that the agent can click to cancel any changes made to an existing record or to cancel the creation of a new record.
Use edit mode?	Requires the agent, when opening an existing record, to click **Edit** before they can make changes to the record.

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Property	Description
Completion code	Adds a completion code to the interaction record when the agent clicks **Save and close**.
Set completed?	Sets the record as completed when the agent clicks **Save and close**.

6.5.3.13 Completion buttons



A **completion button** lets an agent save and close an interaction record.

This control lets you add one or more completion buttons.



Tip: Use a **completion button** when the agent is pushed a record to work on (a call, a chat, an email, and so on).

Use a **save and close button** when:

- The agent manually creates a new interaction record.
- The agent manually opens an existing interaction record and optionally makes changes to that record.

Property	Description
Completion button items	Click + ADD to add a new button to the collection or — to delete a button. For each button, you can set the following properties: » **Order:** Defines the order in which buttons show. You can use any

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Property	Description
	» numbers; the lowest number will be the first button in the collection and the highest number will be the last button. » **ID:** A unique ID for the button. » **Label:** The text shown on the button. » **Enabled condition:** Disables the button from being clicked unless the specified condition is met. Click the box to show the Calculation Builder, where you can set your condition. » **Completion code:** Adds a completion code to the LKTL_COMPLETECODE field in INTERACTION_X when the agent clicks the button. Although this property is optional, the interaction record will only close if LKTL_COMPLETECODE is populated. You can, however, populate this field in other ways. For example, you could populate it via on action on a script box.

6.5.3.14 Action buttons



Use an **action button** to associate one or more actions with a button. Syntelate XA will perform these actions when the agent clicks the button.

This control lets you add one or more action buttons.

Property	Description
Action Button	Click + ADD to add a new button to the collection or — to delete a button.

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Property	Description
Items	For each button, you can set the following properties: » **Order:** Defines the order in which buttons show. You can use any numbers; the lowest number will be the first button in the collection and the highest number will be the last button. » **ID:** A unique ID for the button. » **Label:** The text shown on the button. » **After click actions:** The actions to perform when the button is clicked.

6.5.3.15 Iframe

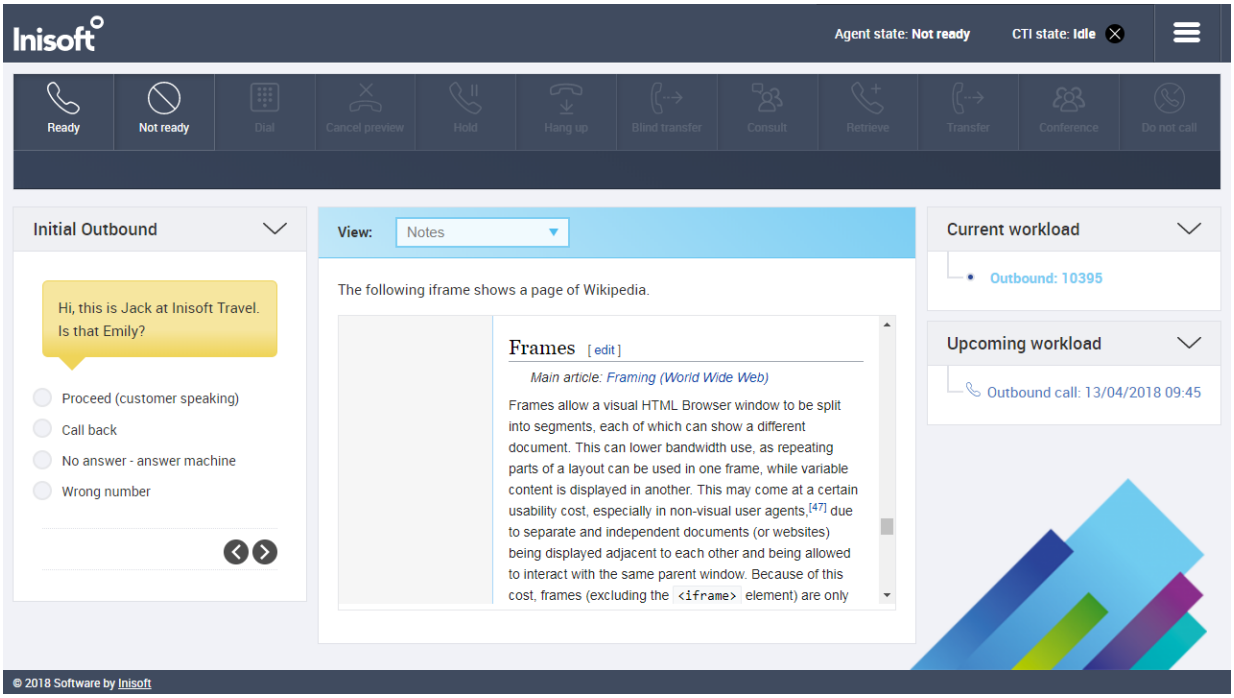


Use an **Iframe** (inline frame) to show another web page on an agent desktop.

Note: Where Syntelate XA is hosted over https, you won't be able to display a non-https web page in the iframe.

In addition, some websites (such as https://www.facebook.com) do not allow themselves to be displayed in an iframe.

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Property	Description
Expression	If set, defines the URL of the web page to show in the iframe (overriding the **Default source** property). Click the **Expression** box to show the Calculation Builder. Here you can, for example, select a database field that contains the URL to use. For more information, see the section on Calculation Builder in *Syntelate XA - Designer*.
Default source	Defines the full URL of the web page to show in the iframe, for example *https://en.wikipedia.org/*.
Height	Defines the height of the control in pixels.

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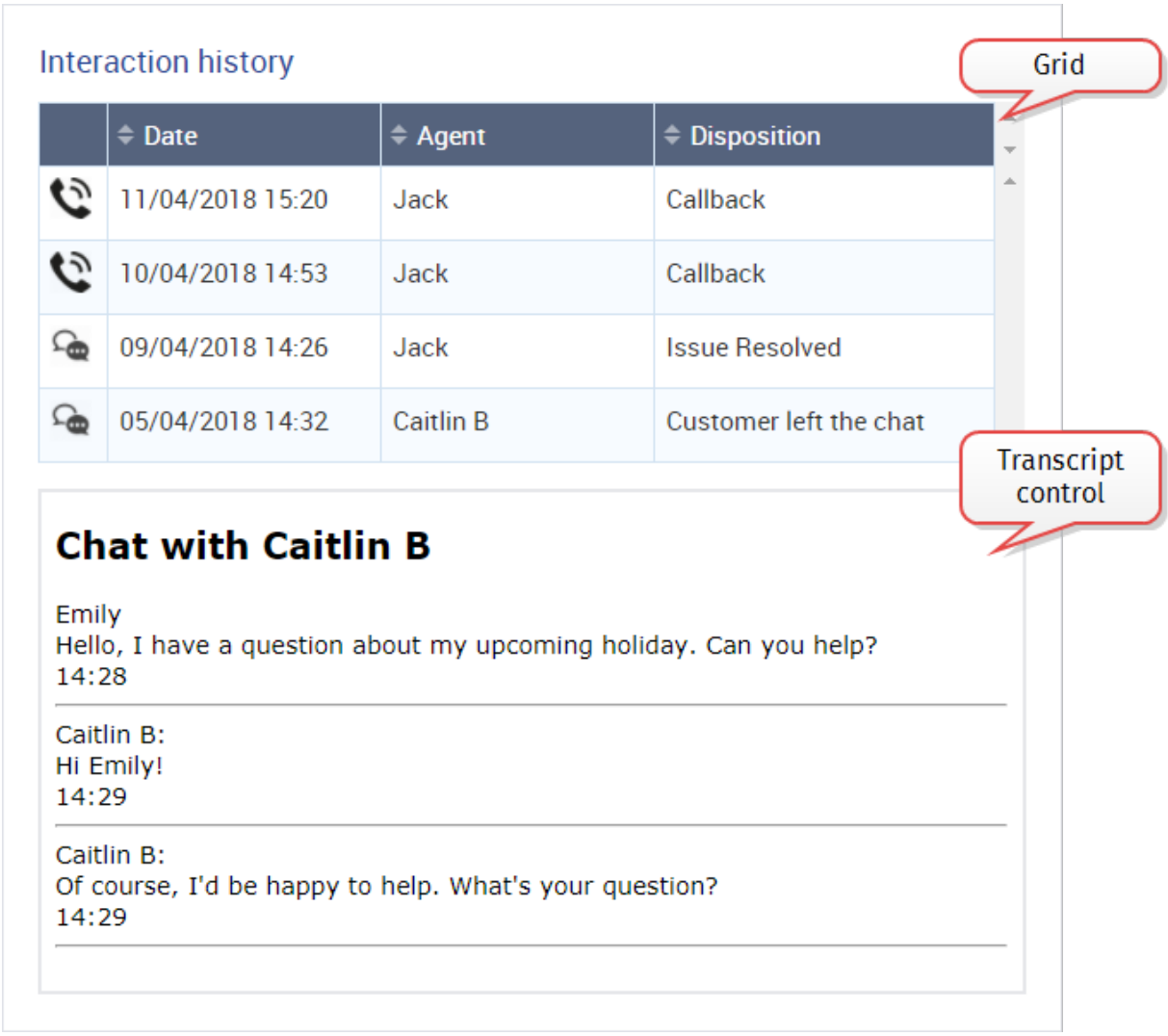
6.5.3.16 Transcript



Use a **transcript**, in conjunction with grids, to show the details of past customer interactions. The control shows:

- **For a chat:** The chat transcript (whether it's a web, SMS, or social media chat)
- **For an email:** The email
- **For a voice call:** The LKTL_AGENTNOTES field

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You'll need to add two grids with the transcript control:

- A visible read-only grid with table INTERACTION_X_HISTORY as its data source
- An invisible grid with view INTERACTION_X_MESSAGE_HISTORY as its data source and set to auto-select the first row

The transcript control itself should be linked to view INTERACTION_X_MESSAGE_HISTORY.

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This set-up allows the agent to click a past interaction record in the visible grid. This then loads and automatically selects the relevant record in the invisible grid, allowing the transcript control to display the appropriate chat transcript / email / agent notes.

Property	Description
Height	Defines the height of the control in pixels.

6.5.3.17 Allocation



An **allocation** control is used in data entry elements for configuration desktops to allow a user to allocate one type of thing to another, such as allocating an agent to an agent group.

You must associate an allocation control with an “allocation”. You can create a new allocation from the control’s properties.

Each allocation involves three database tables that must already exist. When configuring the allocation, you’ll have to select these tables and also select various fields in these tables. The following example goes over all of this.

EXAMPLE

Let’s look at how you’d create an allocation that lets you allocate agents to agent groups.

In Syntelate XA:

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- Every agent is represented by a record in the AGENT database table. In our allocation, this is the **source table**.
- Every agent group is represented by a record in the AGENTGROUPS database table. In our allocation, this is the **selection table**.
- Every relationship between an agent and an agent group is represented by a record in the AGENTS2AGENTGROUPS database table. In our allocation, this is the **allocation table**.

The structure of the AGENTS2AGENTGROUPS table is as so:

AGENTGROUPNO	AGENTNAME
1	jack@example.com
1	zac@example.com
2	jack@example.com

You can see that Jack belongs to agent groups 1 and 2 whereas Zac only belongs to agent group 1.

In our allocation, field AGENTGROUPNO is the **Allocation selection field** whereas AGENTNAME is the **Allocation source field**.

When a user allocates an agent to an agent group using the allocation control, the **Allocation source field** is populated with a field from the source table: the **Source field**. In our allocation, the **Source field** is the AGENTNAME field in the AGENT table.

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Similarly, when a user allocates an agent to an agent group, the **Allocation selection field** is populated with a field from the selection table: the **Selection value field**. In our allocation, the **Selection value field** is the AgentGroupNo field in the AGENTGROUPS table.

The allocation control doesn't display agent group numbers to the user, however. Instead it displays the names of agent groups. These are held in field AgentGroupName in the AGENTGROUPS table. In our allocation, this is the **Selection text field**.

Property	Description
Allocation	Either select an existing allocation (if you have created one) or click + NEW to create a new allocation. See the example above for an overview of each of the fields in the **Add new allocation** dialog box.
Height	Defines the height of the control in pixels.

6.5.3.18 Email



An **email** control lets an agent read and reply to customer emails or to send "unsolicited" outbound emails (outbound emails that are not sent in reply to an inbound customer email). This control is made up of several other controls, including an HTML editor for composing an outbound email.

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Property	Description
Mailbox for sending email	Select the mailbox (email gateway) to use to send the email.
Outbound only?	Click **Yes** where you want the control to be used for sending “unsolicited” outbound emails (in other words, outbound emails not sent in response to an inbound customer email). Click **No** where you want the control to be used for replying to inbound customer emails.
Show CC field?	Click **Yes** if you want to include a **CC** field for outbound emails.
Show BCC field?	Click **Yes** if you want to include a **BCC** field for outbound emails.
Show forward button?	Click **Yes** if you want to include a forward button for the inbound email. Agents can click this to forward the email to another email address.
Customer email address	Defines the email address to which the agent’s reply email should be sent. By default, this is set to: `INTERACTION_X_MESSAGEEMAIL.LKTL_EMAIL`. Click the box to show the Calculation Builder, where you can set a different field if you wish.
Email subject	Defines the default subject of outbound emails. Click the box to show the Calculation Builder, where you can set this. For example, where agents will use the control to reply to customer emails, you might set the subject to: `RE: INTERACTION_X_`

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Property	Description
	MESSAGEEMAIL.LKTL_SUBJECT.
Attachments grid	Select the grid for displaying any attachments to an inbound email.
New attachments grid	Select the grid for allowing agents to add attachments to an outbound email.
Snippet group	Defines the snippet group to use in the HTML editor for the agent's outbound email.
Send email on completion?	Defines whether the email should be sent when the agent clicks **SEND**. Sets LKTL_COMPLETED to Y in the INTERACTION_X_NEWMESSAGE table. If you do not set this to **Yes**, then you must have to some other way of setting this field to Y – from a supervisor desktop, for example. Otherwise, the email will never send.
Message body height	Type a height in pixels for the box that displays the email message. This height does not include the height of the toolbar from which agents can format text and insert snippets.

6.5.3.19 Tabbing

If you activate tabbing for a data entry element, a special tabbing control shows at the top of the element. Use this to navigate between tabs. To add/delete tabs, edit this control's properties.

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Property	Description
Tabs	Defines the tabs that the data entry element uses. **Tab name** is the name of the tab that the agent sees, while **Order** defines the order in which tabs are shown to agents. Tabs with a lower order number are shown before tabs with a higher order number. Click + ADD to add a tab or — to delete a tab.
Show as tabs?	Defines whether agents navigate between tabs by clicking actual tabs or by selecting a tab in a dropdown. For more information, see Enabling/Disabling Tabbing on page 309.

6.5.3.20 Common Properties

Some properties are common to many data entry controls. These are described here rather than under each control.

Required

These properties *must* be set.

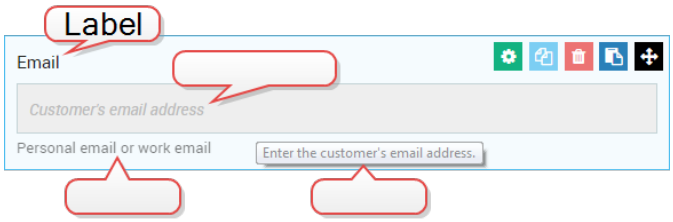
Property	Description
Table name	The database table from which / to which the control's value should be read/written.
Field name	The field in the above database table from which / to which the control's value should be read/written.

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Property	Description
	Click + NEW to create a new field in this table. **Note:** Be sure to select a field of an appropriate data type. For example, a text box control with a type of Date must be mapped to a date field in your data source.
ID	Each data entry control must have an ID. This needs to be unique within the data entry element, but it doesn't need to be unique, say, within the desktop in which the data entry element is used.

Optional

These properties control the look and operation of the control.



Property	Description
Label/Sublabel	Describes the control.
Placeholder text	Help text that shows when the control is blank (in other words, before the agent enters a value). If you specify a **Default value** for the control, the placeholder text only shows if the agent deletes this.

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Property	Description
Hover text	Help text that shows when the agent hovers over the control with their mouse.
Default value	Defines a default value for the control. The agent can edit this if required.
Required?	Sets the control as required. Agents will not be able to save and close the interaction record unless they complete this control.
Read-only?	Sets the control as read-only. Agents will not be able to change the value of this control.
Invisible?	Sets the control as invisible. Agents will not see this control. As well as setting **Yes** or **No**, you can set a conditional statement using the Calculation Builder.
Label color / Text color	**Label color** specifies the color of the label and sublabel. **Text color** specifies the color of the control's value. You should generally leave these properties blank. When blank, Syntelate XA uses the colors of the agent's selected theme. Use these properties when you want to draw the agent's attention to a particular control.
Label alignment	Defines whether the label is shown above the control or to the left of the control.
Text alignment	Defines whether the control's value or placeholder text is aligned left, right, or center.

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6.5.4 Designing a Data Entry Element

To start designing a data entry element, click  in the list of data entry elements.

6.5.4.1 Adding a Container

The first thing that you need to do is add a container. To do this, follow these steps:

1. Click 

.
2. Click the type of container that you want to add.

The new container is added to the end of the data entry element.

6.5.4.2 Resizing a Container

If you ever need to resize a container (for example, to change it from a 100% container to a 50%-50% container), follow these steps:

1. Click  and then **Resize**.
2. Click the new type of container.

The container is updated. Where you've reduced the number of columns, any controls in a deleted column are moved to the rightmost column.

6.5.4.3 Moving a Container

To move a container down, click  and then **Move down**. The container moves below the container that's immediately beneath it.

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To move a container up, click  and then **Move up**. The container moves above the container that's immediately above it.

6.5.4.4 Moving a Container to Another Tab

Where you've enabled tabbing, you can move a container to another tab of a data entry element. To do this, follow these steps:

1. Click  and then **Move**. The **Confirm Move** dialog box shows.
2. In the dropdown, select the tab that you want to move the container to.
3. Click **MOVE**.

The container moves to the end of the selected tab.

6.5.4.5 Deleting a Container

To delete a container (including all of its controls), click  and then **Remove**. The **Confirm delete** dialog box appears.

Click **DELETE** to confirm the deletion.

6.5.4.6 Adding a Control

To add a control to a container, click and drag it from the **Controls** list to the container. Drop the control where you want it to go.

6.5.4.7 Editing a Control's Properties

To edit a control's properties, follow these steps:

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1. Click and then **Properties**. The **Control properties** section shows.
2. Edit the control's properties as required. For a description of each property, see Data Entry Controls on page 273.
3. Click SAVE.

6.5.4.8 Moving a Control (within an Element)

To move a control, click and drag it to where you want it to go, then drop it.

6.5.4.9 Duplicating a Control (within an Element)

To duplicate a control, click and then **Duplicate**.

A new control is added to the end of the current container column. This has the same properties as the duplicated control (except for the **ID** property).

6.5.4.10 Deleting a Control

To delete a control, click and then **Delete**. The **Confirm delete** dialog box appears.

Click **DELETE** to confirm the deletion.

6.5.4.11 Copying a Control (to Another Tab/Element)

You can copy a control to another tab of a data entry element (where you've enabled tabbing).

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You can also copy a control to another data entry element altogether. For this, you must have the other data entry element open in another view, and it must belong to the same universe.

To copy a control, follow these steps:

1. Click  and then **Copy**. The **Confirm Copy** dialog box appears.
2. Select the tab or data entry element that you want to copy the control to.
3. Click **COPY**.

A new control is added to the end of the specified tab / data entry element, in a new 100% container. This control has the same properties as the copied control (except for the **ID** property).

6.5.4.12 Moving a Control (to Another Tab/Element)

You can move a control to another tab of a data entry element (where you've enabled tabbing).

You can also move a control to another data entry element altogether. For this, you must have the other data entry element open in another view, and it must belong to the same universe.

To move a control, follow these steps:

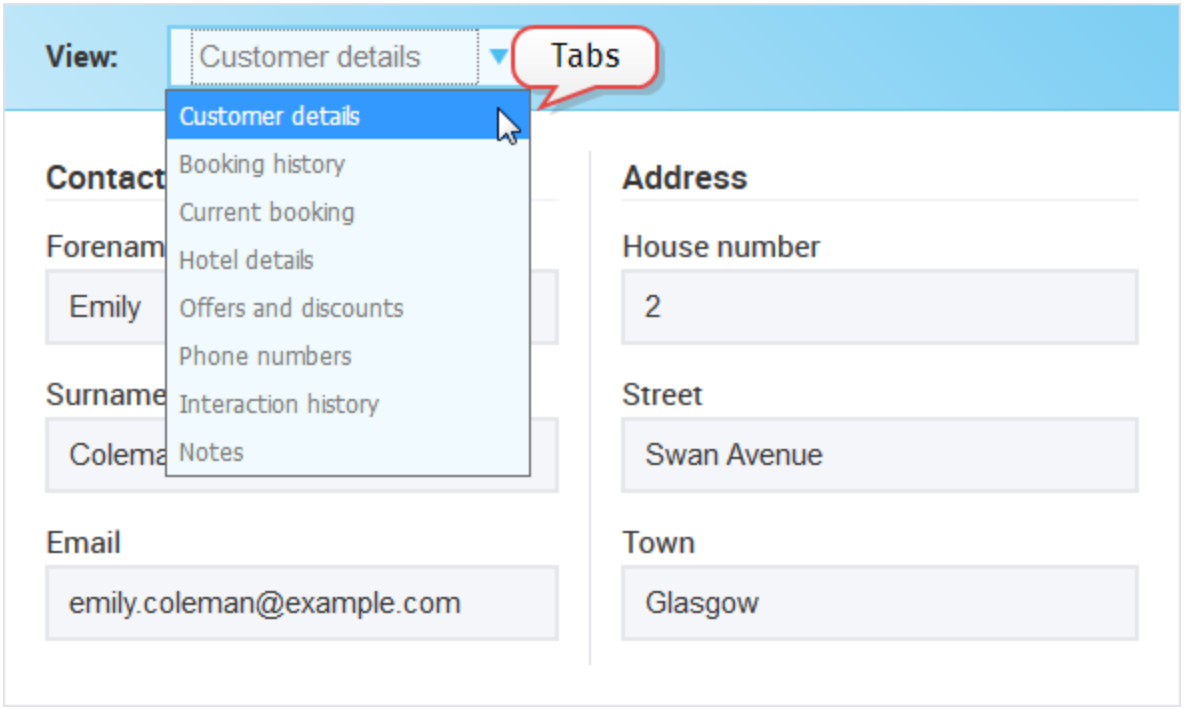
1. Click  and then **Move**. The **Confirm Move** dialog box appears.
2. Select the tab or data entry element that you want to move the control to.
3. Click **MOVE**.

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The control is deleted from the current tab / data entry element, and a new control is added to the end of the specified tab / data entry element in a new 100% container. This control has the same properties as the original control (except for the **ID** property).

6.5.4.13 Enabling/Disabling Tabbing

Tabbing lets you split a data entry element's content across two or more tabs.

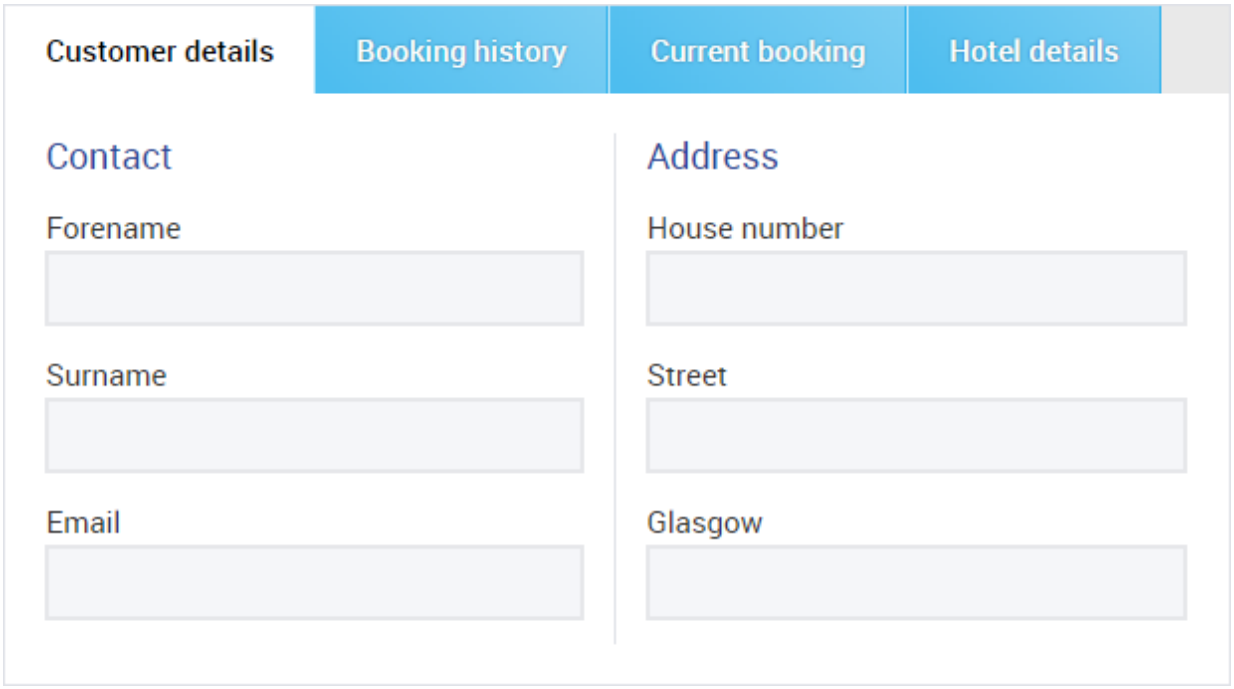


To enable/disable tabbing, click the **Tabbing off** / **Tabbing on**button.

To add/delete tabs, click and then **Properties**. Next edit the **Tabs** property of the special tabbing control.

You can let agents navigate between tabs via a dropdown, as above, or you can show actual tabs that the agent can click, as so:

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To configure this behavior, set the **Show as tabs?** property as required. The default, **No**, lists the tabs in a dropdown.

To switch between tabs in the Designer, use the **Select tab** dropdown.

6.5.4.14 Publishing/Previewing

Any changes that you make to a data entry element are not reflected at runtime until you publish the element.

Perhaps you're not ready to publish the data entry element for runtime but just want to preview how it'll look. Syntelate XA allows you to do this too.

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> **Note:** To publish or preview a data entry element, the data entry element must be part of a desktop.
>
> Publishing a desktop automatically publishes any data entry elements (and scripts) that the desktop uses.

To publish or preview a data entry element, follow these steps:

1. Click 

. The **Publish** dialog box appears.
2. Select whether to preview the data entry element or to publish it.
3. If previewing the data entry element, select the desktop that you'd like to preview.
4. Click **PUBLISH**.

If any controls are missing required properties, an error message is shown and the relevant controls are highlighted. Fix these controls, and then try to publish the element again.

6.5.5 Data Entry Designer

Use the **Data Entry Designer** to design data entry elements for Syntelate XA.

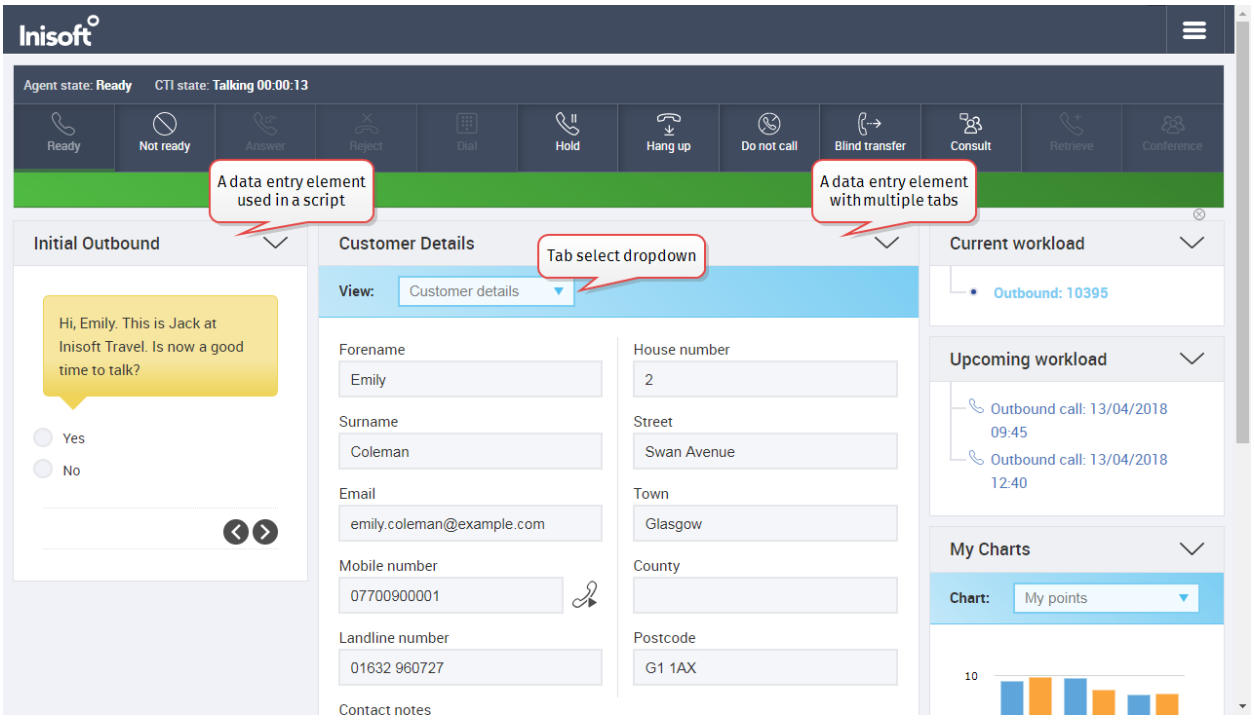
6.5.5.1 What's a Data Entry Element?

A **data entry element** is a form that consists of one or more **data entry controls** (such as text boxes, radio buttons, grids, and so on). Agents use data entry elements to enter and/or view information.

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You can add a data entry element to a desktop directly. Additionally, each page of a script is actually a data entry element.

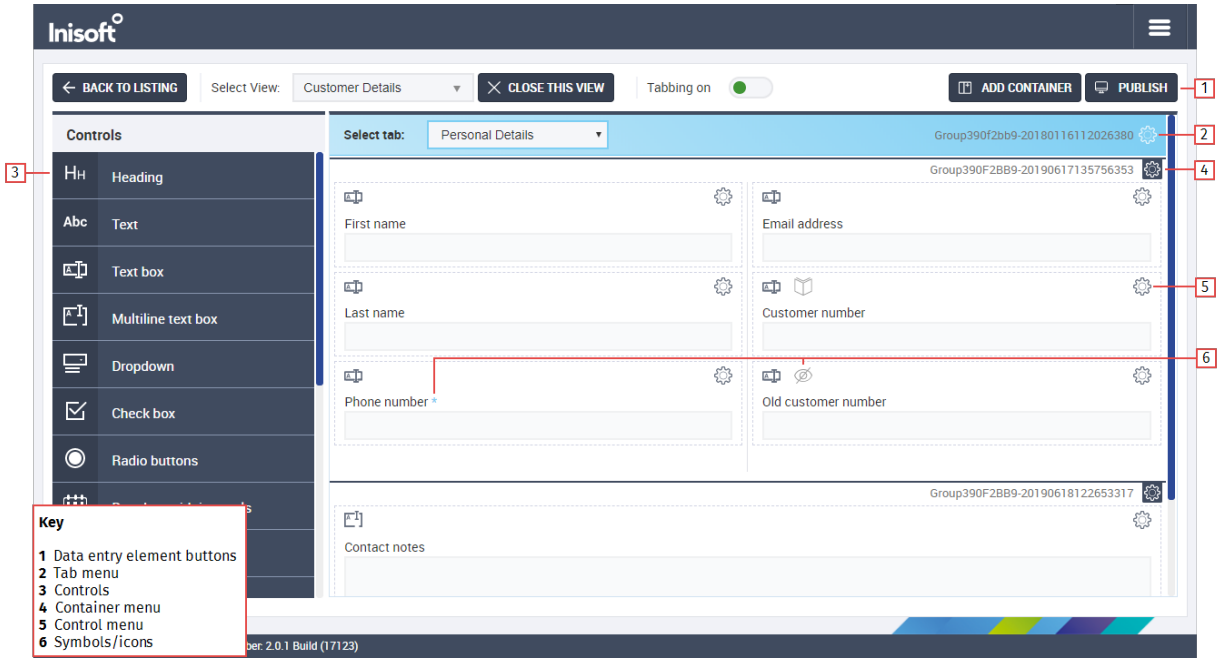
The following screenshot shows data entry elements in Syntelate XA:



6.5.6 The Interface

The layout of the Data Entry Designer is as follows:

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6.5.6.1 Data Entry Element Buttons

The following buttons show at element-level.

Button	Description
Tabbing off	Click to enable/disable tabbing. Tabbing lets you split a data entry element's content across two or more tabs.
ADD CONTAINER	Click to add a new container to the end of the data entry element or to the end of the current tab.
PUBLISH	Click to publish the data entry element for use at runtime (on your test environment). Whenever you update an element in Designer, you must publish it for agents to see the changes you've made.

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Button	Description
	You don't actually need to publish each element that a desktop uses individually. When you publish a desktop, this automatically publishes all scripts and data entry elements that the desktop uses. As such, you may find it easiest to always just publish from the desktop.

6.5.6.2 Tab Menu

Where you have enabled tabbing, click and then **Properties** to add or delete tabs.

Use the **Select tab** dropdown to move between tabs.

6.5.6.3 Controls

To add a control to your data entry element, drag it from the **Controls** list to a container.

For a full description of data entry controls, see Data Entry Controls on page 273.

6.5.6.4 Container Menu

Click on a container to show the following menu:

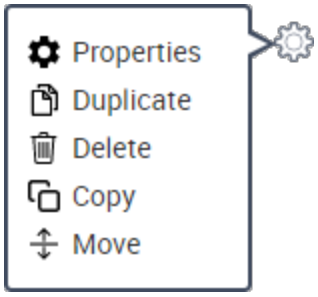


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Option	Description
Move up	Click to move the container above the container that's immediately above it.
Move down	Click to move the container below the container that's immediately beneath it.
Remove	Click to delete the container and all of its controls.
Move	Click to move the container to another tab. Only shows when tabbing is enabled.
Resize	Click to resize the container (for example, to change it from a 50%-50% container to a 100% container).

6.5.6.5 Control Menu

Click  on a control to show the following menu:



Option	Description
Properties	Click to edit the control's properties.
Duplicate	Click to duplicate the control (in other words, to add a copy of the control to the end of the container column).

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Option	Description
Delete	Click to delete the control.
Copy	Click to copy the control (in other words, to add a copy of the control to the end of *another* data entry element). You must have the other data entry element open in another view.
Move	Click to move the control to the end of another data entry element. This deletes it from the current data entry element. You must have the other data entry element open in another view.

6.5.6.6 Symbols/Icons

The following symbols/icons show on controls.

Icon	Description
*	The control is required. Agents will not be able to save and close the interaction record unless they complete this control. To change this, edit the control's **Required?** optional property.
	The control is read-only. Agents will not be able to change the value of this control. To change this, edit the control's **Read-only?** optional property.
	The control is invisible. Agents will not see this control. To change this, edit the control's **Invisible?** optional property.

6.6 Desktop Designer

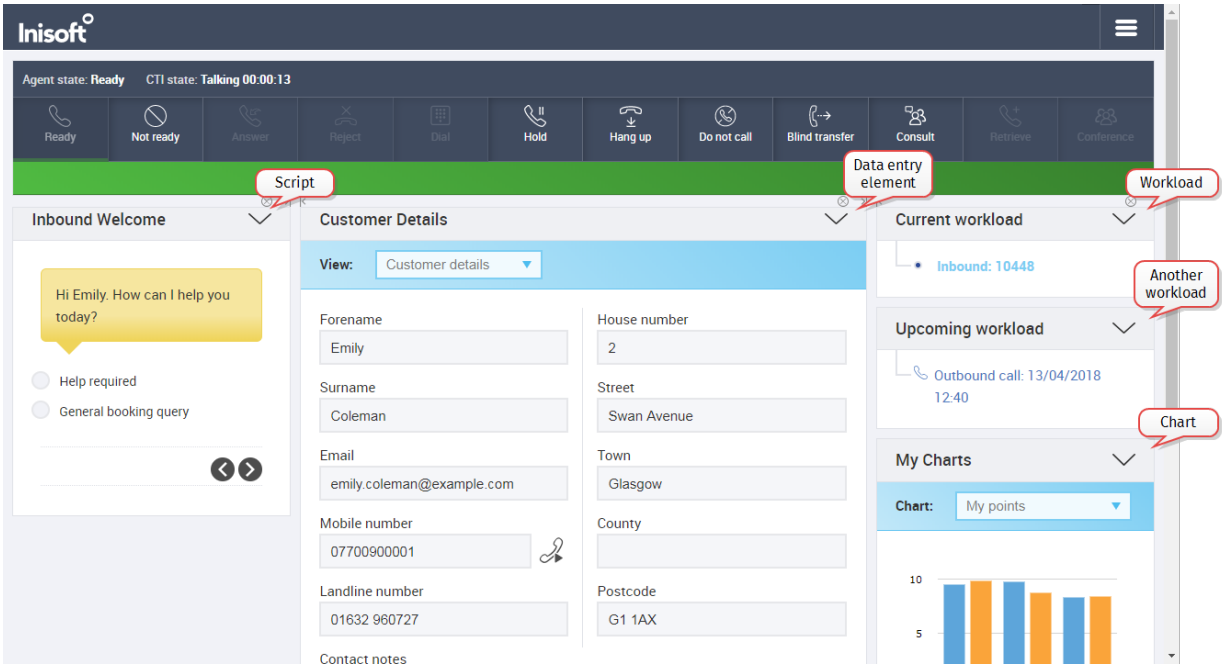
Use the **Desktop Designer** to design desktops for Syntelate XA.

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6.6.1 What's a Desktop?

A **desktop** is the user interface that you use to do things in Syntelate XA. The most common type of desktop is an agent desktop. This is the interface that agents use to handle calls, view customer details, write emails, and so on.

A desktop consists of one or more **desktop controls** (such as data entry elements, scripts, and workloads).



For a user to access the desktop, it must be associated with a **workzone**. When a user logs in to a workzone, they see the desktop that has been associated with it.

> **Note:** For information about workzones, see document *Syntelate XA - First Steps (for Agents)*.

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6.6.1.1 Conditions

The **Condition** property of various desktop controls lets you set a conditional expression to define when the control is shown on the desktop. This flexibility helps you design a dynamic desktop that updates what's on the agent's screen depending on parameters such as interaction type, DNIS/DDI number, customer date of birth, agent group ID, etc.

EXAMPLE

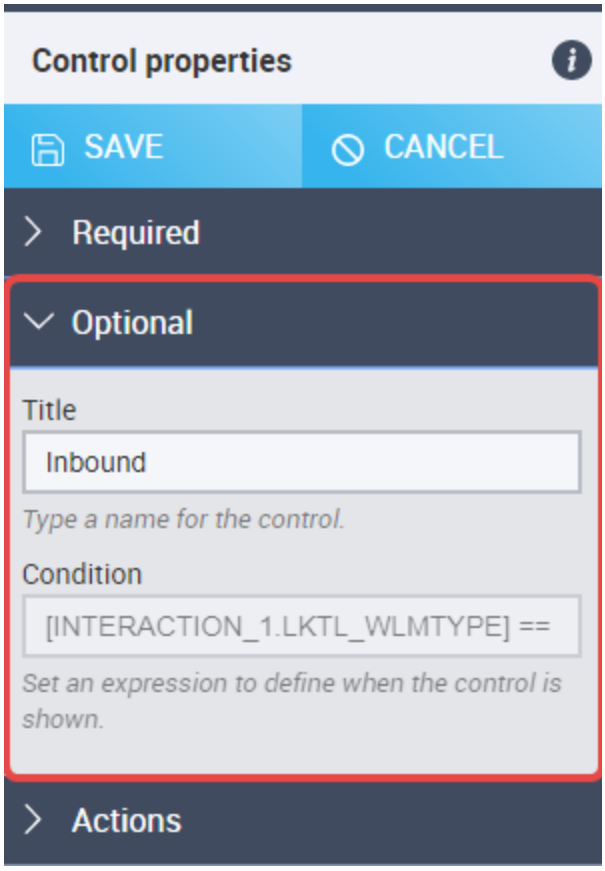
At Inisoft Travel, agents see a **Customer Details** data entry element on their desktops when inbound calls are passed to them. This is because the Customer Details data entry element has been configured with a conditional expression that checks if the interaction is an inbound call:

```
[INTERACTION_1.LKTL_WLMTYPE] == 'INBOUND'
```

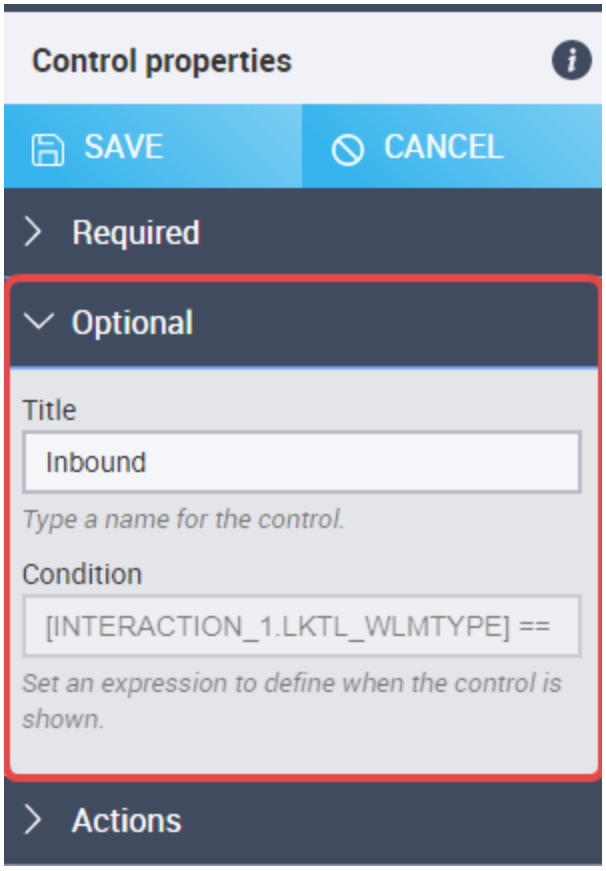
When that condition is true, the **Customer Details** data entry element is displayed on the agent desktop.

Defining a condition is optional. You define conditions by opening the **Control properties** of the desktop control and, under **Optional**, clicking in the **Condition** text box.

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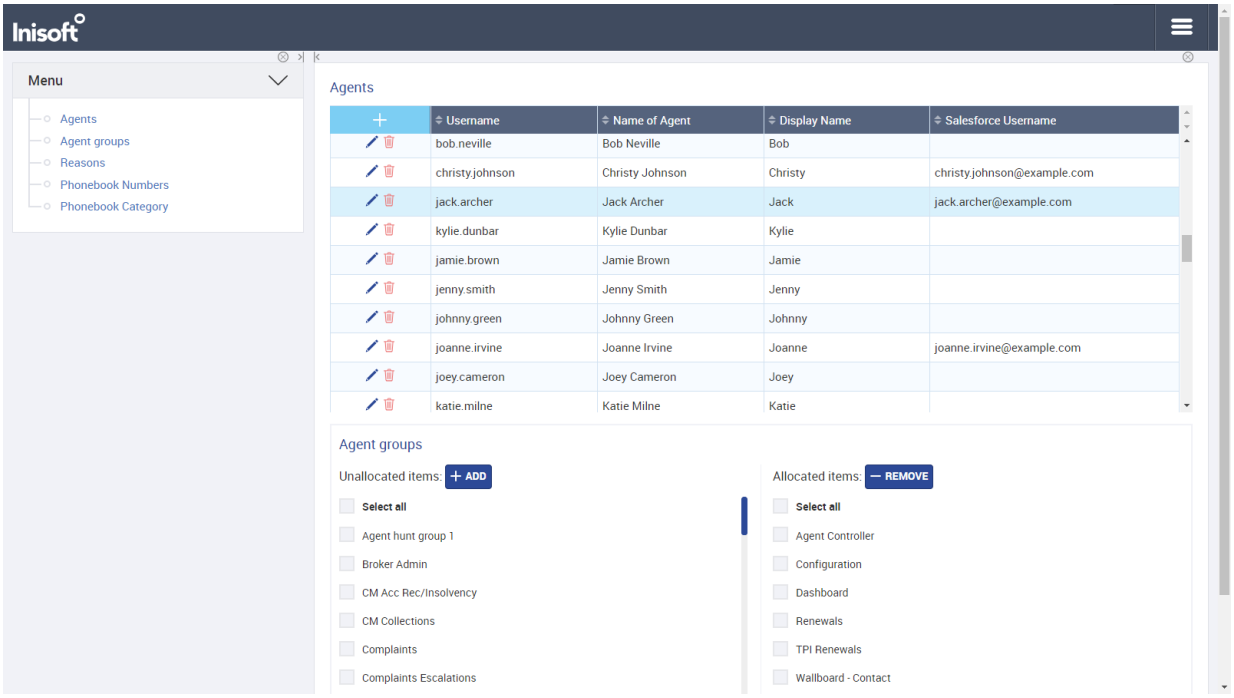
This opens the Calculation Builder on page 492, where you define the conditional expression. If you leave the **Condition** blank, the desktop control will be visible by default.

You can find out more about creating desktop controls and conditions by reading the Desktop Controls section of the Designer document.

6.6.2 Configuration Desktop

A **configuration desktop** is a special type of desktop that lets you configure aspects of Syntelate XA. It consists of a menu control and one or more data entry element controls.

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In the above example, the menu control lists each of the five data entry elements that this configuration desktop contains. The user can click an item in this menu to move to the appropriate data entry element.

The **Agents** data entry element is the active data entry element in this example. This lets the user add, edit, and/or delete agents. You can also use this data entry element to allocate a selected agent to one or more agent groups.

A configuration desktop is really just a user-friendly visual interface for viewing or amending data held in database tables.

EXAMPLE

In Syntelate XA every agent is represented by a record in the AGENT database table. Similarly, the allocation of agents to agent groups is defined in the

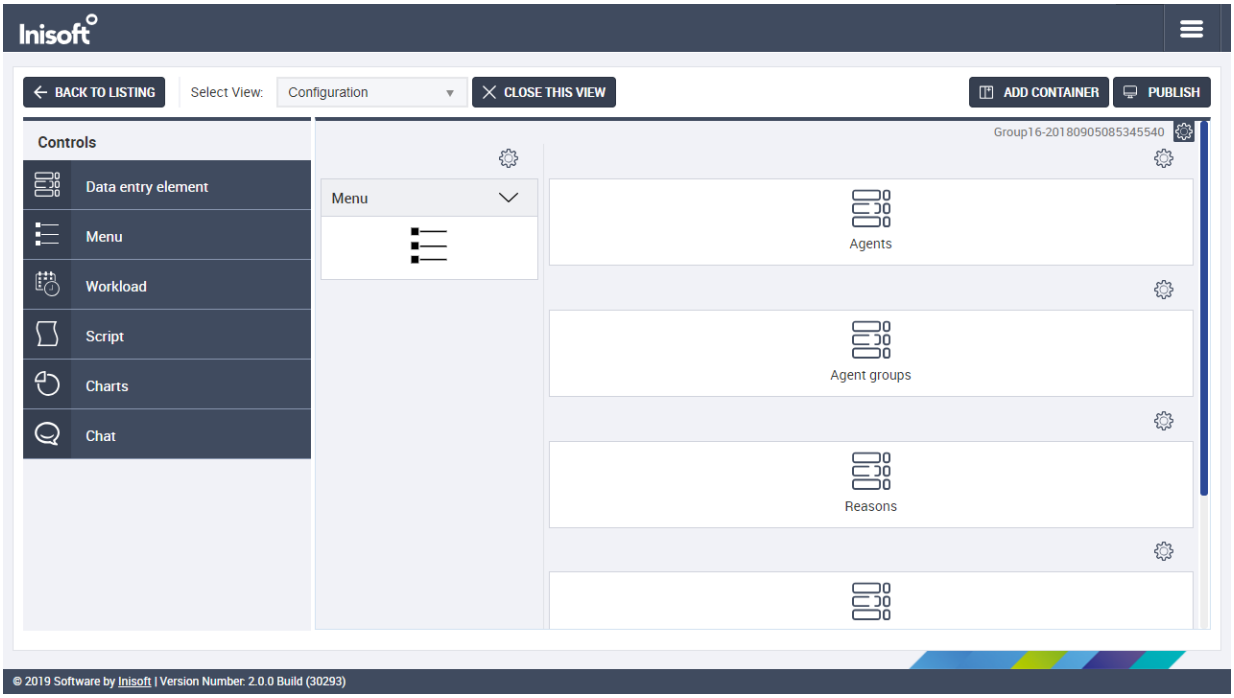
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AGENTS2AGENTGROUPS database table.

The data entry element shown above consists of two data entry controls:

- A grid control that lets the user add, edit, or delete agents (in other words, lets the user insert, update, or delete records in the AGENT database table)
- An allocation control that lets the user allocate an agent to, or remove an agent from, agent groups (in other words, lets the user insert or delete records in the AGENTS2AGENTGROUPS database table)

A **25%-75%** container works pretty well for a configuration desktop. For example, in the Desktop Designer, the above configuration desktop would look as so:



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6.6.3 Adding a Desktop

To add a new desktop, follow these steps:

1. In the list of desktops, click 

. The **Add Desktop** section is shown.
2. In the **Name** box, type a name for the desktop.
3. Select whether to add the desktop to an existing universe or else to create a new universe for it. You'll need to complete further fields based on your selection.

   > **Warning:** Make sure you choose the right universe for your desktop, because you cannot edit this setting after the desktop has been added to Syntelate XA. If you choose an unsuitable universe, but you don't notice your mistake until after you have designed the desktop, you would need to delete the desktop (and thereby lose all its elements, controls, scripts) and start again.

4. To create a Configuration Desktop on page 344configuration desktop, select the **Configuration desktop** check box.
5. Click 

.

You have successfully added a new desktop! Next, you will want to start designing it. Head to Designing a Desktop on the next page for guidance.

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6.6.4 Designing a Desktop

If you are creating a new desktop, before you can design it you need to add it to Syntelate XA.

When you need to design an existing desktop, click its **DESIGN** button on the Desktops index page.

6.6.4.1 Adding a Container

The first thing that you need to do is add a container. To do this, follow these steps:

1. Click ADD CONTAINER.
2. Click the type of container that you want to add.

The new container is added to the end of the desktop.

Resizing a Container

If you ever need to resize a container (for example, to change it from a 100% container to a 50%-50% container), follow these steps:

1. Click and then **Resize**.
2. Click the new type of container.

The container is updated. Where you've reduced the number of columns, any controls in a deleted column are moved to the rightmost column.

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Moving a Container

To move a container down, click  and then **Move down**. The container moves below the container that's immediately beneath it.

To move a container up, click  and then **Move up**. The container moves above the container that's immediately above it.

Deleting a Container

To delete a container (including all of its controls), click  and then **Remove**. The **Confirm delete** dialog box appears.

Click **DELETE** to confirm the deletion.

6.6.4.2 Adding a Control

To add a control to a container, click and drag it from the **Controls** list to the container. Drop the control where you want it to go.

Editing a Control's Properties

To edit a control's properties, follow these steps:

1. Click  and then **Properties**. The **Control properties** section shows.
2. Edit the control's properties as required. For a description of each property, see Desktop Controls on page 329.

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3. Click SAVE.

Moving a Control (within a Desktop)

To move a control, click and drag it to where you want it to go, then drop it.

Duplicating a Control (within a Desktop)

To duplicate a control, click and then **Duplicate**.

A new control is added to the end of the current container column. This has the same properties as the duplicated control.

Deleting a Control

To delete a control, click and then **Delete**. The **Confirm delete** dialog box appears.

Click **DELETE** to confirm the deletion.

Copying a Control (to Another Desktop)

To copy a control to another desktop, you must have the other desktop open in another view and it must belong to the same universe. Next, follow these steps:

1. Click and then **Copy**. The **Confirm Copy** dialog box appears.
2. In the dropdown, select the desktop that you want to copy the control to.
3. Click **COPY**.

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A new control is added to the end of the specified desktop, in a new 100% container. This has the same properties as the copied control.

Moving a Control (to Another Desktop)

To move a control to another desktop, you must have the other desktop open in another view and it must belong to the same universe. Next, follow these steps:

1. Click  and then **Move**. The **Confirm Move** dialog box appears.
2. In the dropdown, select the desktop that you want to move the control to.
3. Click **MOVE**.

The control is deleted from the current desktop, and a new control is added to the end of the specified desktop in a new 100% container. This control has the same properties as the original control.

6.6.4.3 Creating a Workzone

To create a new workzone and to associate your desktop with this workzone, click 

.

This button only shows where the desktop is not already associated with a workzone.

> **Note:** You won't have the option to configure any of the workzone's settings when creating a workzone in this way.
>
> You can, however, edit the settings of the created workzone at any time by using the Workzone Editor.

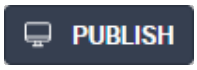
© Inisoft Ltd 2025

6.6.4.4 Publishing/Previewing

Any changes that you make to a desktop are not reflected at runtime until you publish the desktop. Publishing a desktop also publishes any scripts and data entry elements that the desktop uses.

Perhaps you're not ready to publish the desktop for runtime but just want to preview how it'll look. Syntelate XA allows you to do this too.

To publish or preview a desktop, follow these steps:

1. Click 

. The **Publish** dialog box appears.
2. Select whether to preview the desktop or to publish it.
3. Click **PUBLISH**.

If any controls are missing required properties, an error message is shown. Fix these controls, and then try to publish the element again.

6.6.4.5 Migrating the Desktop to Your Live Database

When you're working in the Desktop Designer, you're working on your test database. You must migrate your desktop to your live database before it can be used by agents.

To do this, go to **Version Control** in Syntelate Designer. Follow the instructions given in the Version Control on page 475 section of this Help.

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6.6.5 Desktop Controls

This section describes the controls that you can add to a desktop. Each control has a number of properties that you can set.

6.6.5.1 Data entry element



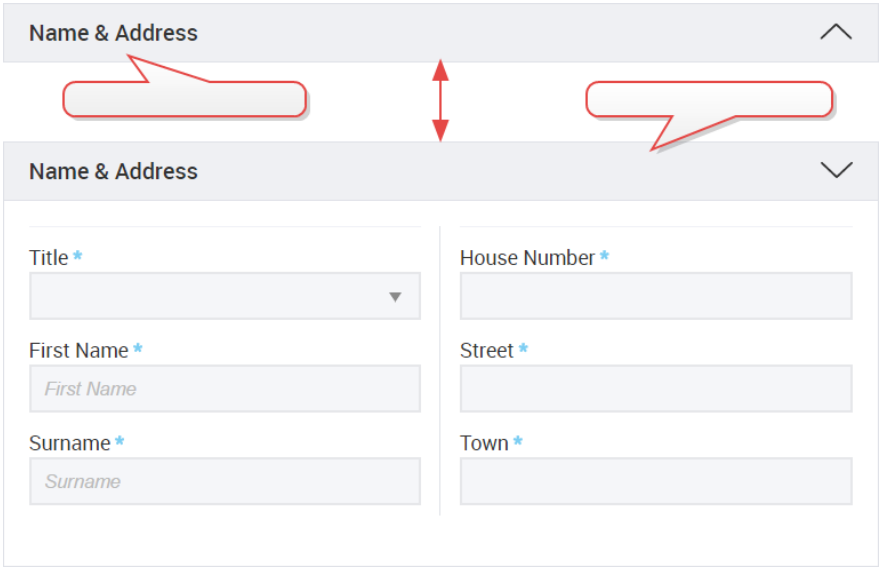
A **data entry element** is a form that consists of one or more data entry controls, such as text boxes, radio buttons, and grids.

You design data entry elements using the Data Entry Designer. From the Desktop Designer, you can create new data entry elements and view existing data entry elements.

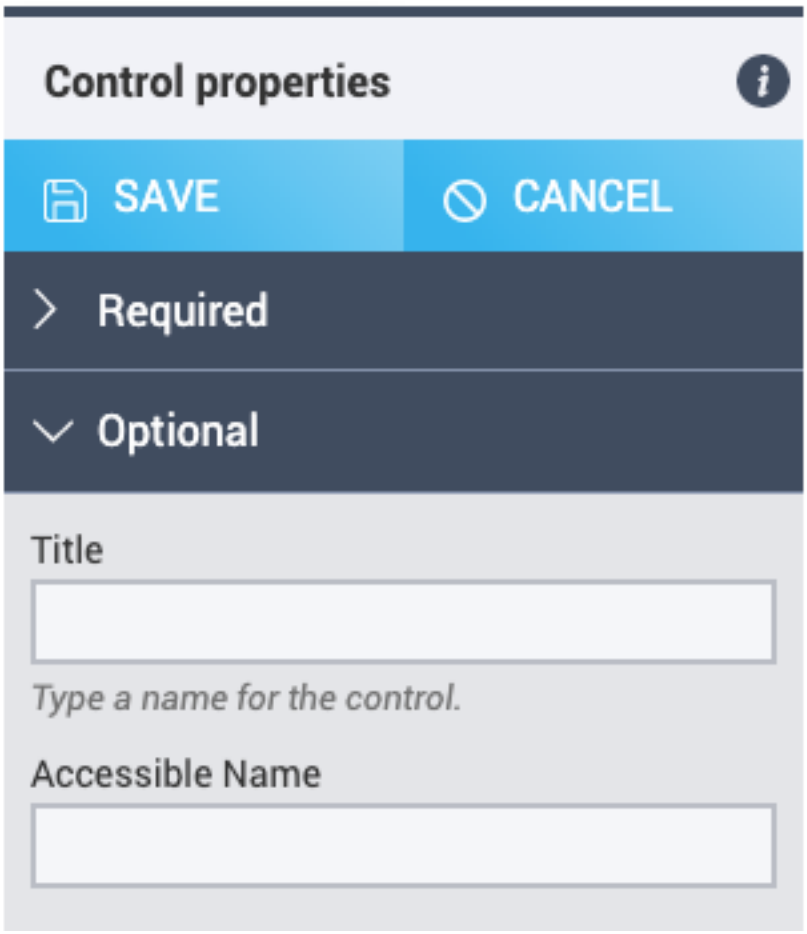
For a configuration desktop, you can drag on as many data entry elements as you require. The user will only be able to view one of these at a time. You'll also need to add a menu control to your configuration desktop. The user will use this to navigate between the data entry elements.

Property	Description
Element name	Select the data entry element to use, or click + NEW to create a new data entry element. If you choose to create a new data entry element, you'll have the option to open and start editing it straightaway.
Title	Type a title to show in the data entry element's title bar.

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Property	Description
	 If you do not define a title, the data entry element will not have a title bar and it will always be expanded.
Accessible Name	**Accessible Name** is only picked up by Syntelate XA if you provide a Title.

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Property	Description
	 If you provide a Title, you should provide the same name for the **Accessible Name**. Doing so adds the **Accessible Name** to the skip navigation menu. The skip nav allows users of assisted devices and keyboards to tab to the desktop control quickly, saving them time and effort.
Condition	Set a condition to define when the control is shown on the desktop. For example, perhaps you have a data entry element that you only want to show when an agent is working on an email. For this, you'd set a condition

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Property	Description
	of: `[INTERACTION_1.LKTL_WLMTYPE] == 'EMAIL'` (assuming your universe's INTERACTION_X table is called INTERACTION_1) You define the condition using the Calculation Builder (see Calculation Builder on page 492).
On enter actions	Select actions to perform when this data entry element loads.

6.6.5.2 Menu



A **menu** lets an agent create a new record.

Property	Description
Title	Type a title to show in the menu's title bar.
Items	Defines the options in the menu. For each item, the **Title** is what the agent sees in the menu. As for the **Item**: » For a regular desktop, this is the type of record that Syntelate XA creates when the agent clicks the option. » For a configuration desktop, this is the data entry element on page 329data entry element that Syntelate XA displays when the agent clicks the item. You must already have dragged this data entry element

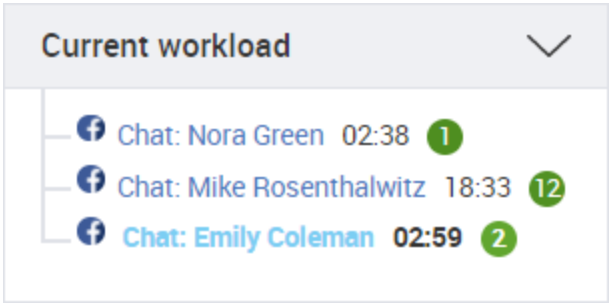
© Inisoft Ltd 2025

Property	Description
	» onto the desktop. Click + ADD to add an item or − to delete an item.

6.6.5.3 Workload



A **workload** shows records that an agent is currently working on *or* records that the agent will soon have to work on. The agent can click any record in a workload to open it (unless they are on a focused interaction).



Syntelate XA supports two workloads per desktop:

- 1 current workload
- 1 upcoming workload

Property	Description
Title	Type a title to show in the workload's title bar.
Current or upcoming?	Click **Current** to show records that the agent is currently working on or **Upcoming** to show records that the agent will soon have to work on.

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Property	Description
Refresh rate	For upcoming workloads only, type the refresh rate in seconds. The refresh rate defines how frequently Syntelate XA checks for new records to display or for records to remove (because these records have already been dealt with by other agents). If you leave this property blank, then the workload will only refresh when a record is closed.
Max items to display	For upcoming workloads only, type the maximum numbers of items to display. Leave blank to display all items.

6.6.5.4 Script



A **script** tells agents what to say and do during a call. It also defines the different paths that the call can go down.

You design scripts using the Script Designer. From the Desktop Designer, you can create new scripts and view existing scripts.

Property	Description
Script name	Select the script to use, or click  to create a new script. If you choose to create a new script, you'll have the option to open and start editing it straightaway.
Title	If you wish, type a title for this script. This is for your benefit only: it will not be shown to agents. At runtime, a script displays the name of the current data entry element in the title bar.

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Property	Description

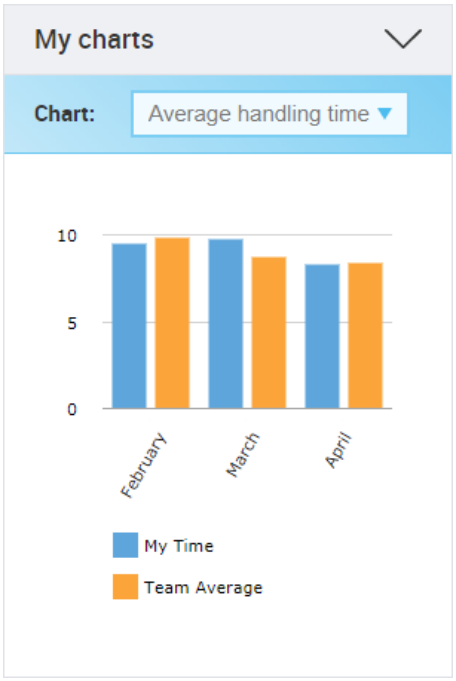
Condition	Set a condition to define when the control is shown on the desktop.
	
	For example, you may want to show different scripts for inbound and outbound voice calls. In this case, you'd have two script controls on your desktop. One would have the following condition:
	
	`[INTERACTION_1.LKTL_WLMTYPE] == 'INBOUND'`
	
	The other would have this condition:
	
	`[INTERACTION_1.LKTL_WLMTYPE] == 'OUTBOUND'`
	
	(assuming your universe's INTERACTION_X table is called INTERACTION_1)
	
	You define the condition using the Calculation Builder (see Calculation Builder on page 492).

6.6.5.5 Charts



A **charts** control shows one or more charts on a desktop.

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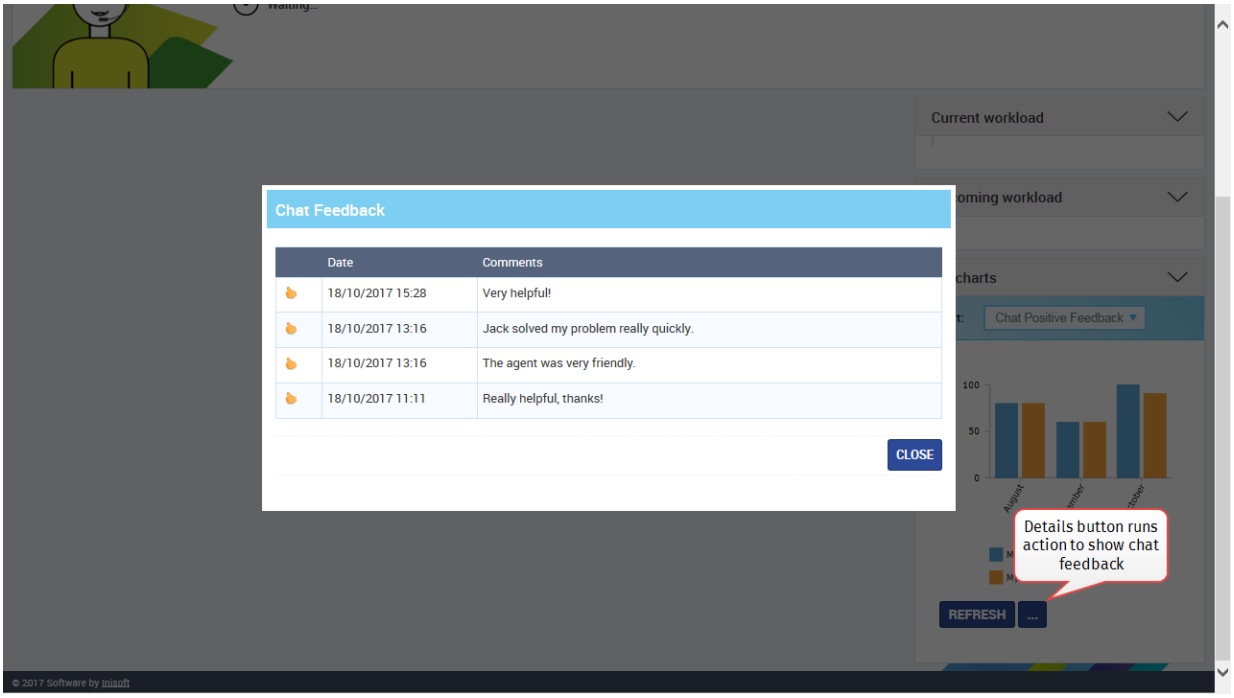
To design charts, use the Charting Editor tile of Syntelate Studio.

Property	Description
Title	Type a title for the chart(s).
Show dropdown?	Shows a dropdown menu that lets the agent select a chart to view. This property only shows when two or more charts have been added. If you select **No** for this property, then you'll need to use actions to toggle between charts.
Show refresh button?	Shows a button on the chart that the agent can click to refresh the chart.
Charts	Click + ADD to add a new chart or — to delete a chart.

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Property	Description
	For each chart, you can set the following properties: » **Order:** Defines the order in which charts show. You can use any numbers; the lowest number will be the first chart and the highest number will be the last chart. » **Chart:** Select the chart to use. » **Refresh rate:** Defines how frequently the chart refreshes (in seconds). If you leave this property blank, then the chart will never refresh (unless the agent clicks the refresh button). » **Details button actions:** Adds a details (…) button that the agent can click and which runs one or more actions. The intended purpose of this is to allow the agent to view additional information. For example, let's say the chart shows the proportion of positive/negative customer feedback the agent has received from web chats. Clicking this button might open a dialog box showing the actual feedback comments written by customers (see the screenshot on the next page).

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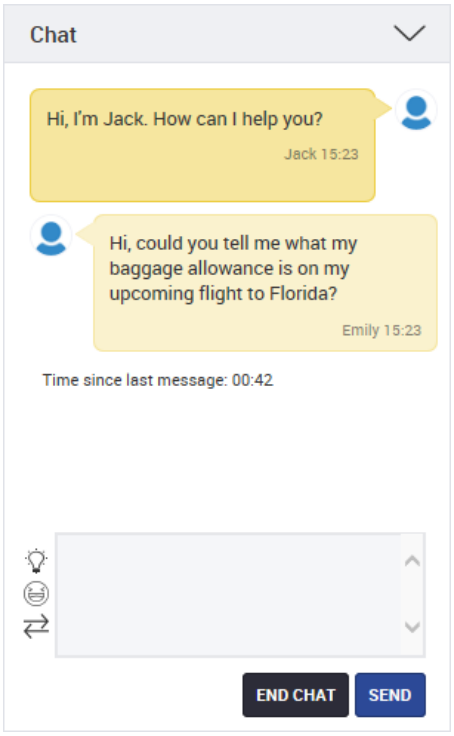


6.6.5.6 Chat



A **chat** lets agent handle chats with customers. The **Chat** element supports web, SMS, and social media messaging chats. All types of chat are displayed in the **Chat** element on the agent desktop. Here is an example of the **Chat** element showing a web chat:

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Properties

The following table describes the properties you can change for the **Chat** element in Desktop Designer. You can see these properties if the **Chat** element is on the canvas, by selecting the **Chat** element's contextual menu (a cogwheel icon). Doing so will open the **Control properties** pane.

Property	Description
Display **END CHAT** button	Required. Select Yes or No.

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Property	Description
	Note: Since the **END CHAT** button is a disposition button, and because the agent must be provided with a means to disposition each interaction, if you choose not to display the **END CHAT** button to the agent, you must provide an alternative disposition button elsewhere on the Syntelate XA Agent Desktop, such as in the Script.
Title	Enter a title to show in the **Chat** element's title bar. In most contexts, the title "Chat" works well. But you can name it anything you like. The important point is that the agent can see the title, and it helps them use the agent desktop.
On enter actions	Select actions to perform when the chat loads.

Feature	Web chat	Facebook Messenger	SMS chat	WhatsApp
Transfer	✓	✓	✓	✓
Upload files	✓			
Smart Text	✓	✓	✓	✓
Rewriter	✓	✓	✓	✓
Sentiment Analysis	✓	✓	✓	
Translation	✓			

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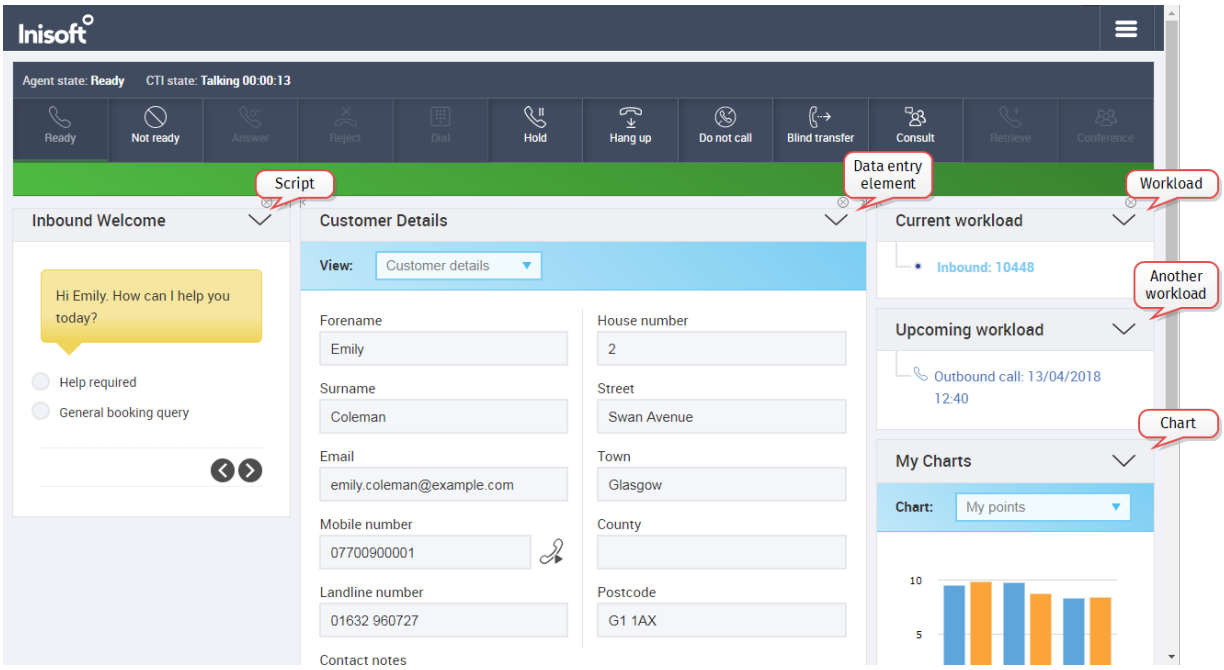
6.6.6 Desktop Designer

Use the **Desktop Designer** to design desktops for Syntelate XA.

6.6.6.1 What's a Desktop?

A **desktop** is the user interface that you use to do things in Syntelate XA. The most common type of desktop is an agent desktop. This is the interface that agents use to handle calls, view customer details, write emails, and so on.

A desktop consists of one or more **desktop controls** (such as data entry elements, scripts, and workloads).



For a user to access the desktop, it must be associated with a **workzone**. When a user logs in to a workzone, they see the desktop that has been associated with it.

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Note: For information about workzones, see document *Syntelate XA - First Steps (for Agents)*.

Conditions

The **Condition** property of various desktop controls lets you set a conditional expression to define when the control is shown on the desktop. This flexibility helps you design a dynamic desktop that updates what's on the agent's screen depending on parameters such as interaction type, DNIS/DDI number, customer date of birth, agent group ID, etc.

EXAMPLE

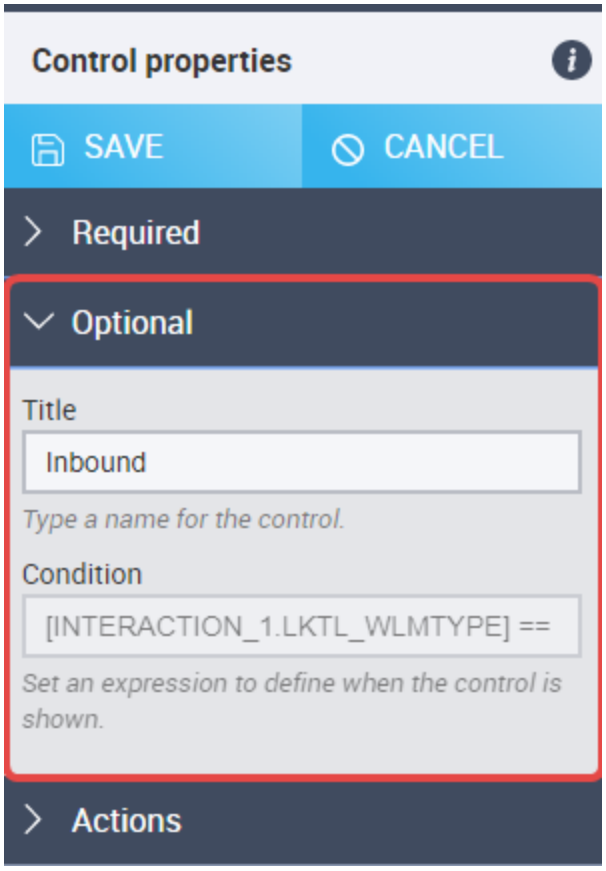
At Inisoft Travel, agents see a **Customer Details** data entry element on their desktops when inbound calls are passed to them. This is because the Customer Details data entry element has been configured with a conditional expression that checks if the interaction is an inbound call:

```
[INTERACTION_1.LKTL_WLMTYPE] == 'INBOUND'
```

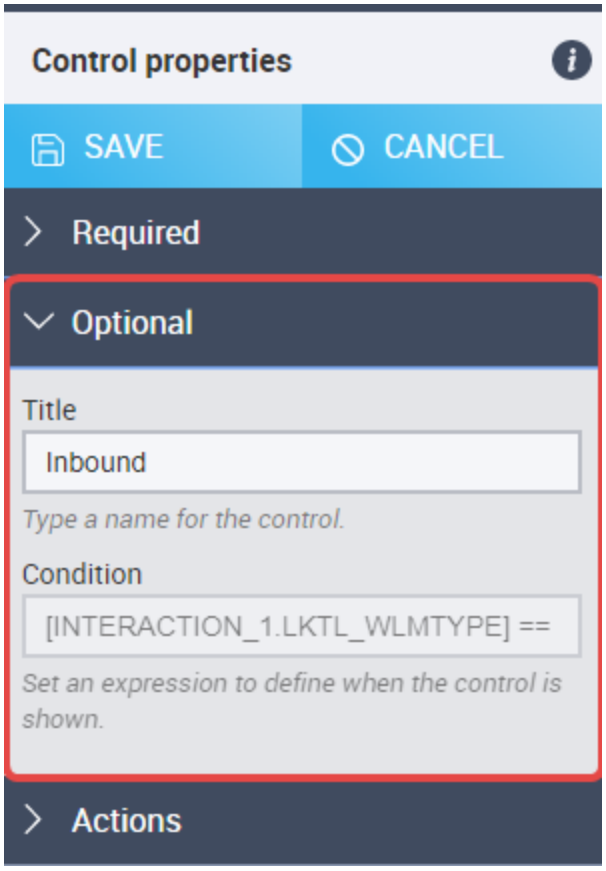
When that condition is true, the **Customer Details** data entry element is displayed on the agent desktop.

Defining a condition is optional. You define conditions by opening the **Control properties** of the desktop control and, under **Optional**, clicking in the **Condition** text box.

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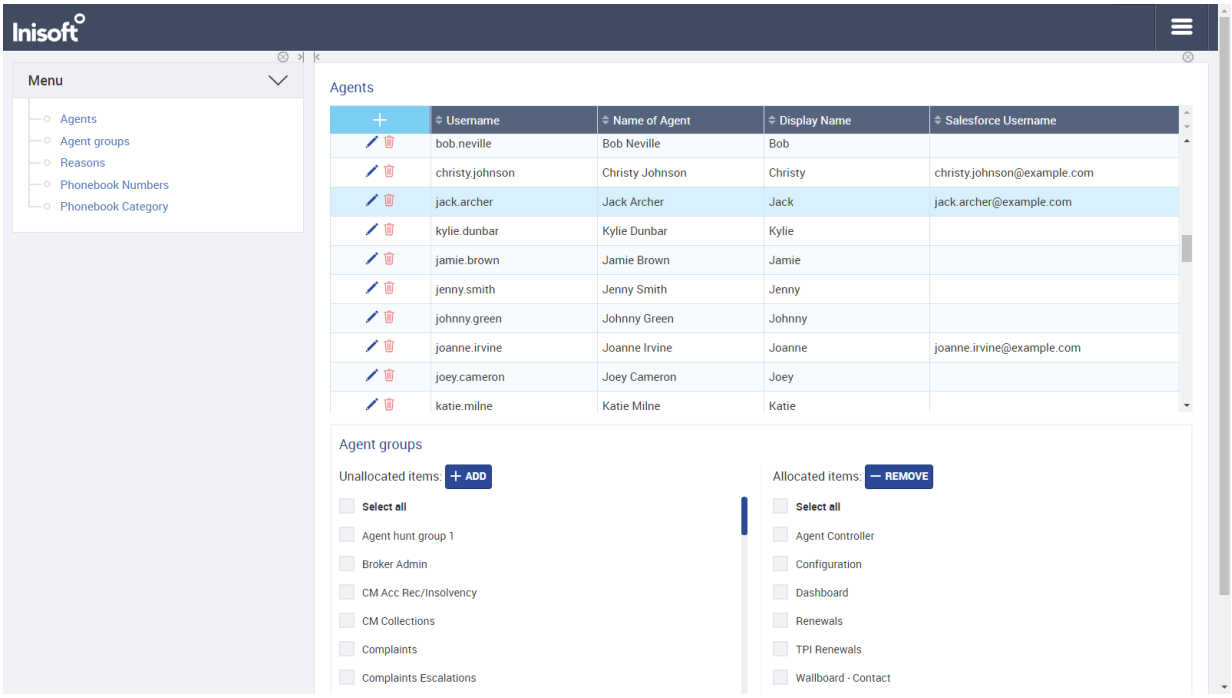
This opens the Calculation Builder on page 492, where you define the conditional expression. If you leave the **Condition** blank, the desktop control will be visible by default.

You can find out more about creating desktop controls and conditions by reading the Desktop Controls section of the Designer document.

6.6.6.2 Configuration Desktop

A **configuration desktop** is a special type of desktop that lets you configure aspects of Syntelate XA. It consists of a menu control and one or more data entry element controls.

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In the above example, the menu control lists each of the five data entry elements that this configuration desktop contains. The user can click an item in this menu to move to the appropriate data entry element.

The **Agents** data entry element is the active data entry element in this example. This lets the user add, edit, and/or delete agents. You can also use this data entry element to allocate a selected agent to one or more agent groups.

A configuration desktop is really just a user-friendly visual interface for viewing or amending data held in database tables.

EXAMPLE

In Syntelate XA every agent is represented by a record in the AGENT database table. Similarly, the allocation of agents to agent groups is defined in the

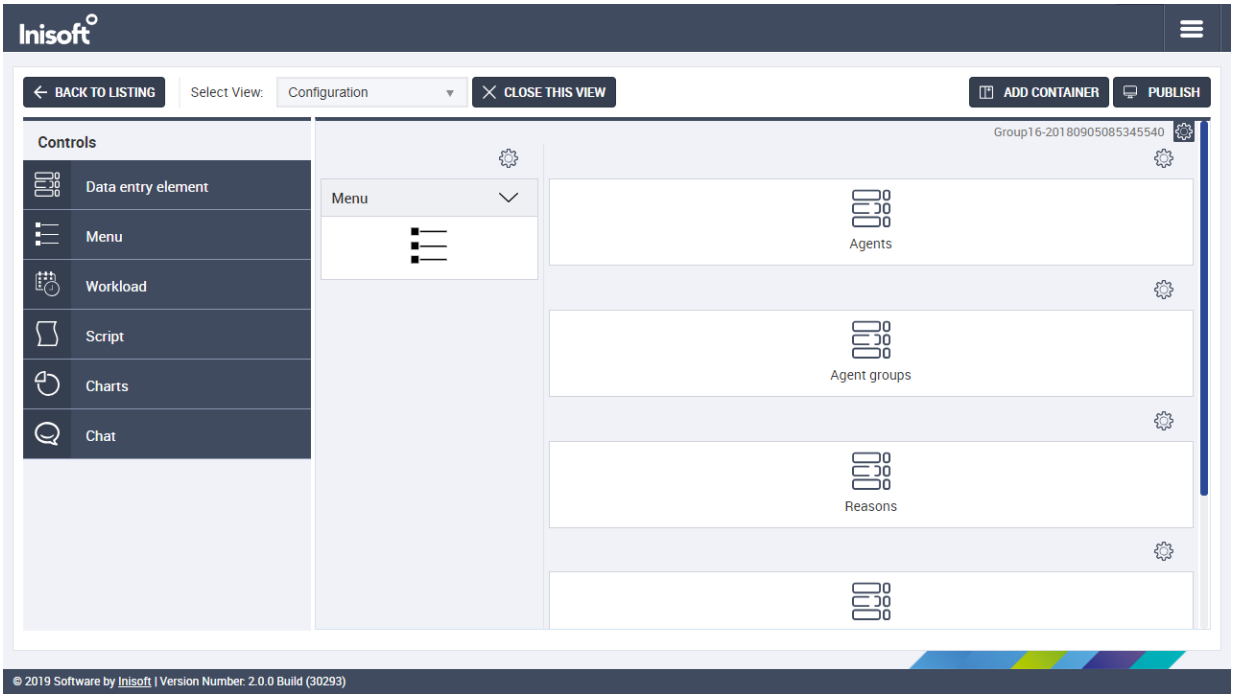
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AGENTS2AGENTGROUPS database table.

The data entry element shown above consists of two data entry controls:

- A grid control that lets the user add, edit, or delete agents (in other words, lets the user insert, update, or delete records in the AGENT database table)
- An allocation control that lets the user allocate an agent to, or remove an agent from, agent groups (in other words, lets the user insert or delete records in the AGENTS2AGENTGROUPS database table)

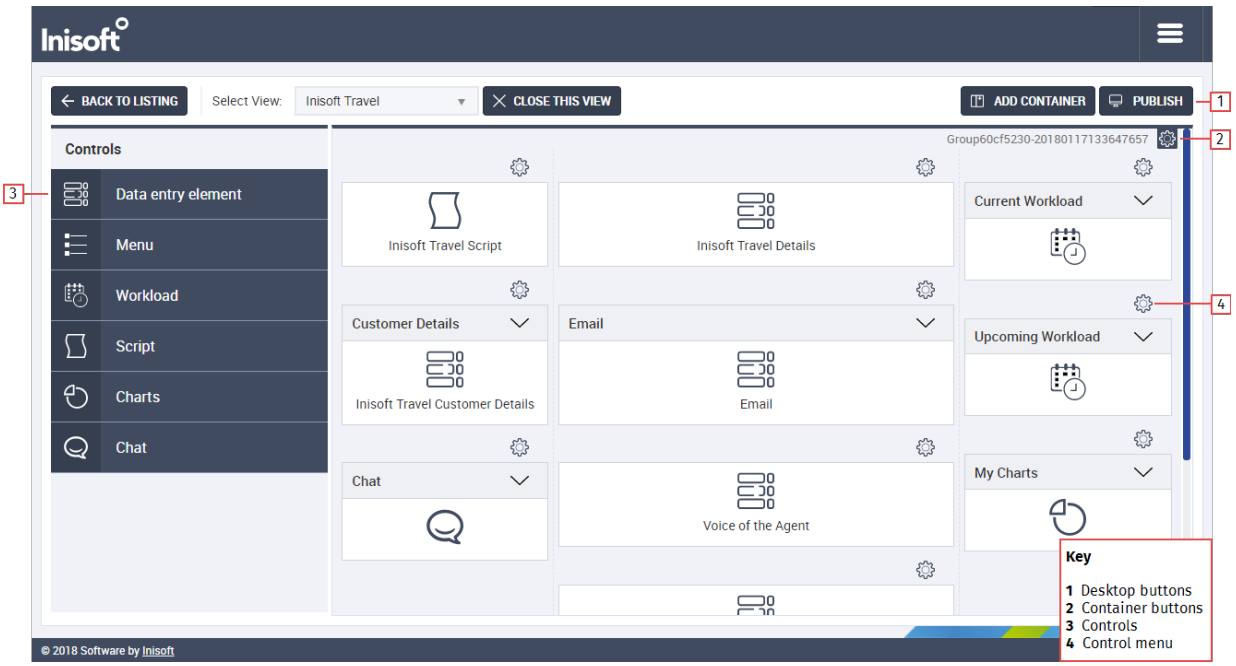
A **25%-75%** container works pretty well for a configuration desktop. For example, in the Desktop Designer, the above configuration desktop would look as so:



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6.6.7 The Interface

The layout of the Desktop Designer is as follows:



6.6.7.1 Desktop Buttons

The following buttons show at desktop-level.

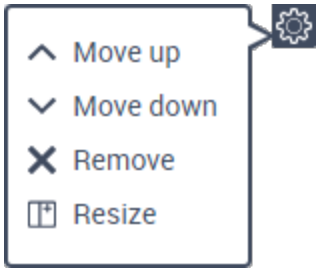
Button	Description
+ CREATE WORKZONE	Click to create a new workzone to associate the desktop with this workzone. **Note:** Shows only when the desktop is *not* associated with a workzone.

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Button	Description
ADD CONTAINER	Click to add a new container to the end of the desktop.
PUBLISH	Click to publish the desktop for use at runtime (on your test environment). Whenever you update an element in Designer, you must publish it to see the changes you've made at runtime. Publishing a desktop automatically publishes any data entry elements or scripts that it uses.

6.6.7.2 Container Button

Click  on a container to show the following menu:



Option	Description
Move up	Click to move the container above the container that's immediately above it.
Move down	Click to move the container below the container that's immediately beneath it.
Remove	Click to delete the container and all of its controls.

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Option	Description
Resize	Click to resize the container (for example, to change it from a 50%-50% container to a 100% container).

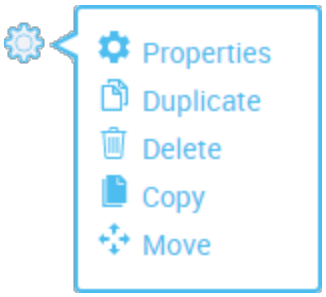
6.6.7.3 Controls

To add a control to your desktop, drag it from the **Controls** list to a container.

For a full description of desktop controls, see Desktop Controls on page 329.

6.6.7.4 Control Menu

Click on a desktop control to show the following menu:



Option	Description
Properties	Click to edit the control's properties.
Duplicate	Click to duplicate the control (in other words, to add a copy of the control to the end of the container column).
Delete	Click to delete the control.

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Option	Description
Copy	Click to copy the control (in other words, to add a copy of the control to the end of *another* desktop). You must have the other desktop open in another **View**.
Move	Click to move the control to the end of another desktop. This deletes it from the current desktop. You must have the other desktop open in another **View**.

6.7 General Tasks

Some tasks are common to the various Designer tiles. This section provides step-by-step instructions for those tasks.

6.7.1 Copying an Element

To copy an element such as a desktop or script, follow these steps:

1. In the list of elements, click  for the element that you want to copy. The **Save as** section is shown.
2. In the **Name** box, type a name for the new element.
3. Click 

.

The copy is saved in the same universe as the source element.

6.7.2 Deleting an Element

To delete an element such as a desktop or script, follow these steps:

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1. In the list of elements, click  for the element that you want to delete. The **Confirm delete** dialog box appears.
2. Click **DELETE**.

6.7.3 General Tasks

Some tasks are common to the various Designer tiles. This section provides step-by-step instructions for those tasks.

6.7.4 Renaming an Element

To rename an element such as a desktop or script, follow these steps:

1. In the list of elements, click  for the element that you want to rename. The **Rename** section is shown.
2. In the **Name** box, type a new name for the element.
3. Click 

.

6.7.5 Unlocking an Element

When you are designing an element, Syntelate XA locks it to help prevent other users making changes at the same time. After you finish working on an element, you need to unlock it so that the element becomes available to other users.

You can unlock an element either from design mode or from the listing page.

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6.7.5.1 Unlocking from Design Mode

If you are working on an element in design mode, you can unlock it by closing it. Select CLOSE THIS VIEW. Closing the element also unlocks it.

6.7.5.2 Unlocking from the Listing Page

1. In the list of elements, click  for the element you want to unlock. The **Confirm Unlock** dialog appears.
2. Click **UNLOCK**. The element will be unlocked.

6.8 Desktop Design Tutorial

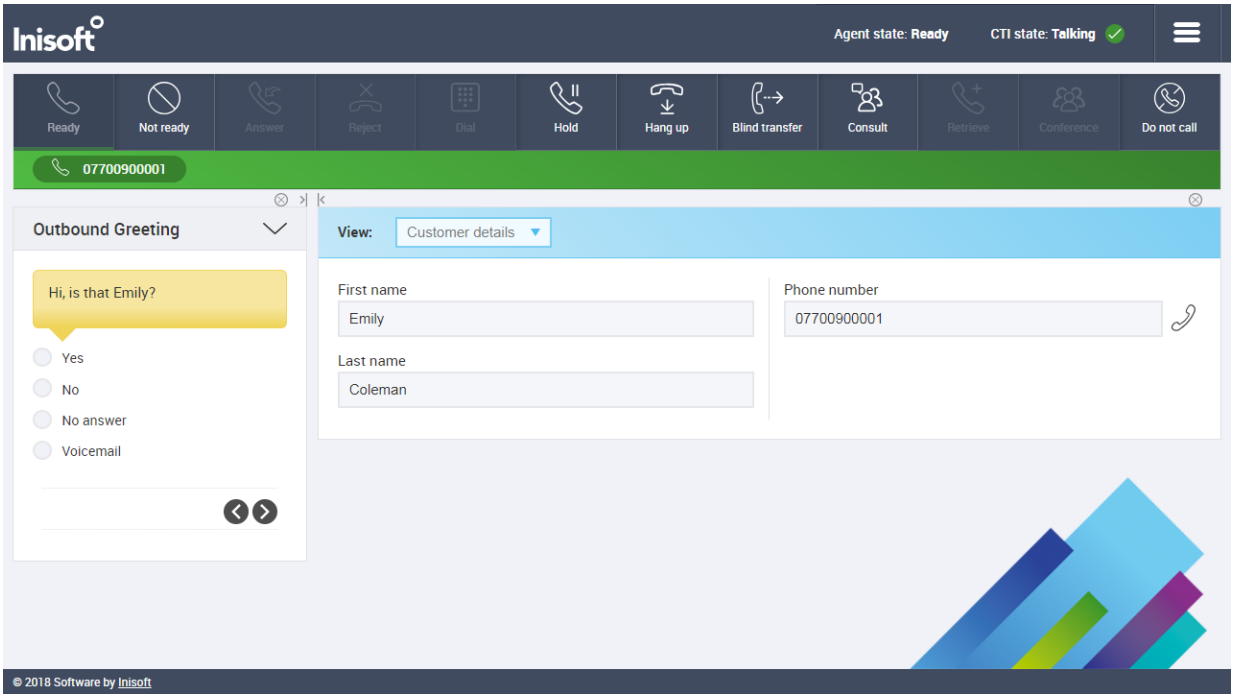
This tutorial is designed for people completely new to Syntelate XA and who are looking to learn how to design and use agent desktops.

This tutorial was designed to be used with a Syntelate XA environment that has been specially set up to support this tutorial. Among other things, this environment should include a universe called **Agent Desktop** and also be set up with dummy outbound records.

> **Note:** If you do not have access to such an environment, you can still read through this tutorial to learn the basics of Syntelate XA. Be aware, however, that you may not be able to follow some steps exactly.

By going through this tutorial, you'll pick up the basics of Syntelate XA and create a very simple agent desktop that looks like this:

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Before you go any further, you'll need a few things:

- The URL for a Designer environment that you can use with this tutorial
- The URL for the corresponding runtime environment
- Login details

You may not know what a "Designer environment" or a "runtime environment" is yet, but that's OK: we'll cover that in the tutorial!

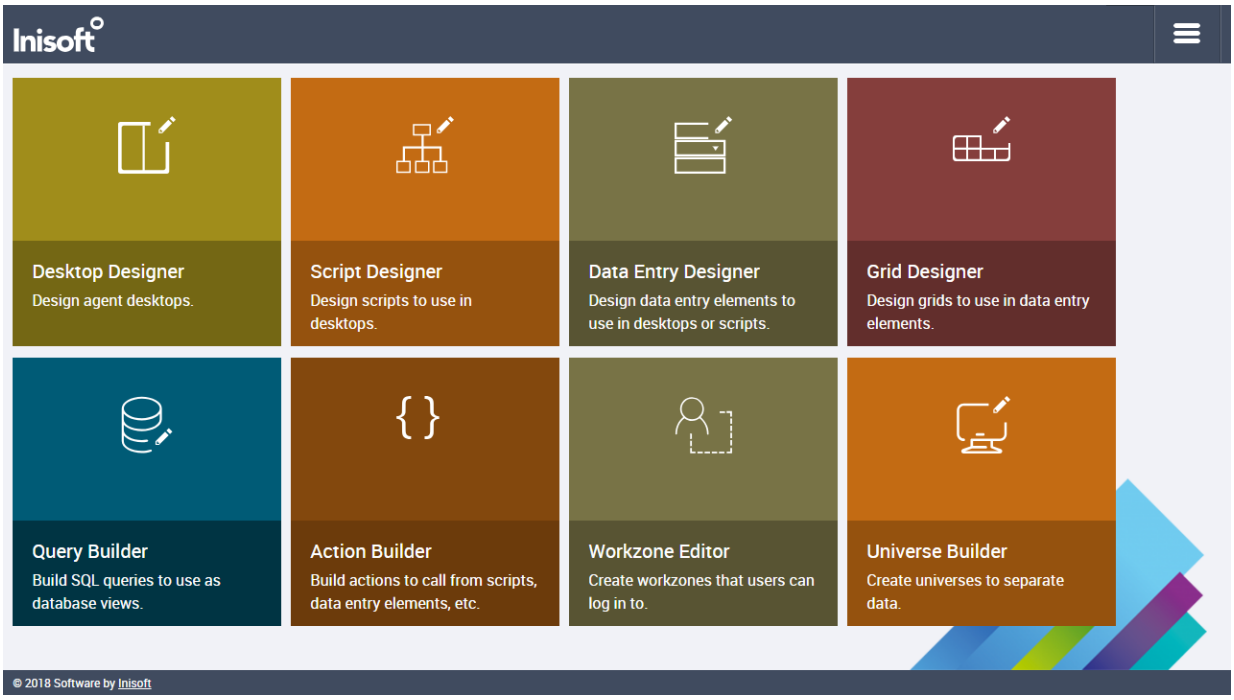
Without any further ado, let's get started by creating a desktop.

6.8.1 Creating a Desktop

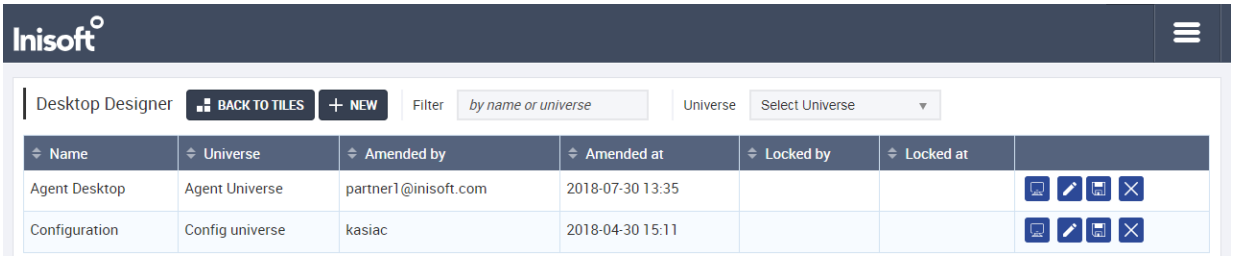
In your web browser, visit the URL for the Designer. This is where you can design desktops for your contact center agents.

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Log in using your login details. You'll see some tiles:



You're going to create a new desktop, so click **Desktop Designer**. You'll be shown a list of existing desktops:



Click 

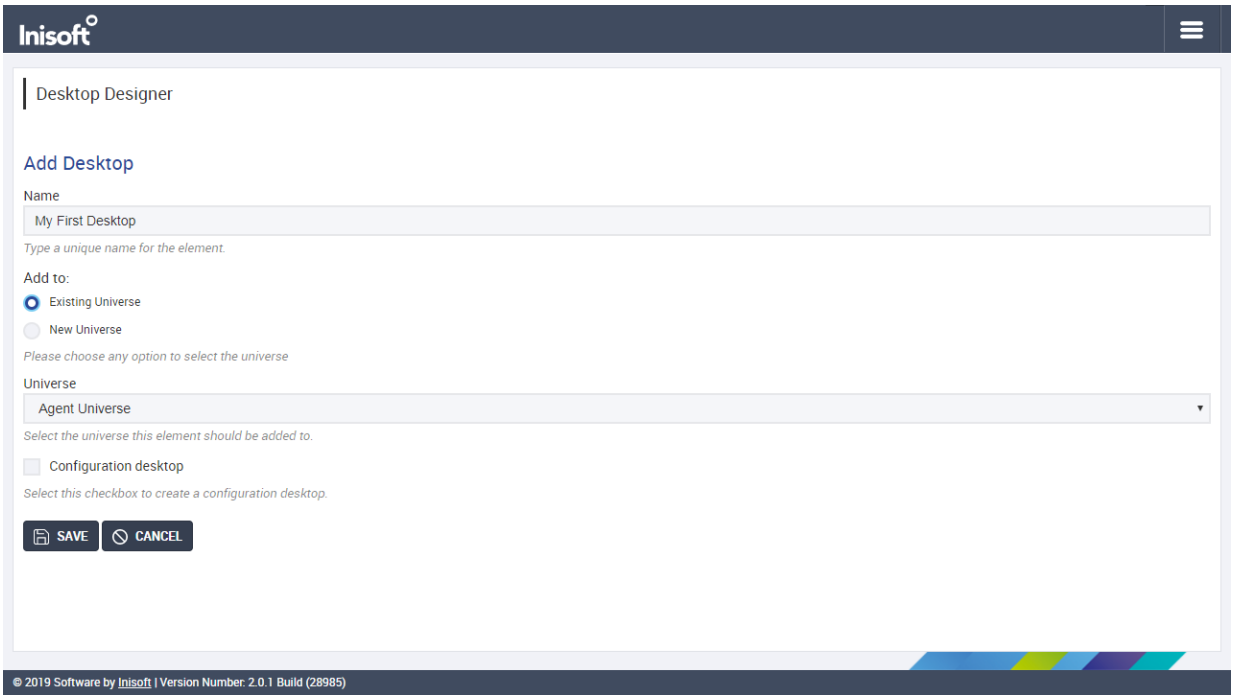
.

You'll be asked to type a name for the desktop. Give it a name like **My First Desktop**.

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> **Note:** If that name is already in use, call it something similar instead. This applies throughout this tutorial, whenever you're asked to name something.

Next, choose to add the desktop to an existing universe and select **Agent Universe** as the universe. You're probably wondering what a universe it, but we'll talk about that later. For now, let's push on!



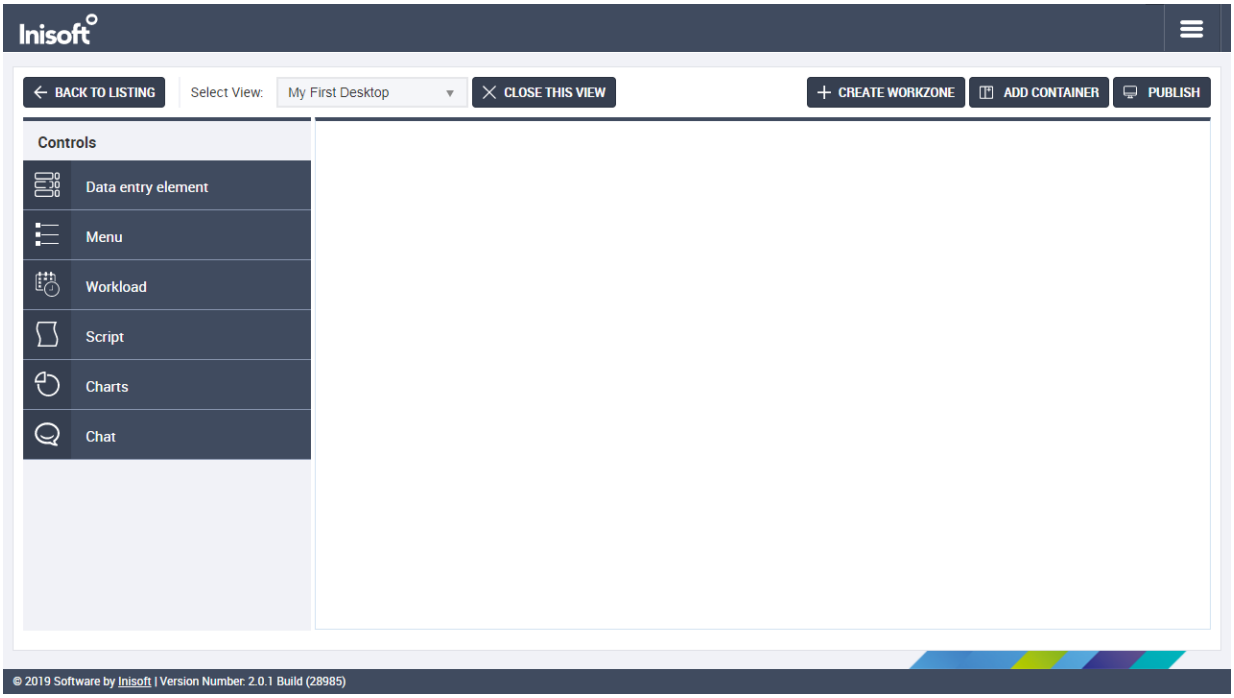
> **Note:** If you're following this tutorial on an environment that has *not* been specially set up to support your learning, the **Agent Universe** universe may not be available. If this is the case, you'll have to use a different universe.

That's all you need to enter on this page, so click 

to create your desktop.

You'll see a blank desktop:

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In the next chapter, we'll start designing the desktop, but first click + CREATE WORKZONE.

As with universes, we'll talk about workzones later, so don't worry about this for now.

Now let's move onto designing a basic desktop!

6.8.2 Designing a Data Entry Element

You're looking at an empty data entry element. Let's add some stuff to it!

6.8.2.1 Adding a Container

Just as with a desktop, the first thing we need to add to a data entry element is a container.

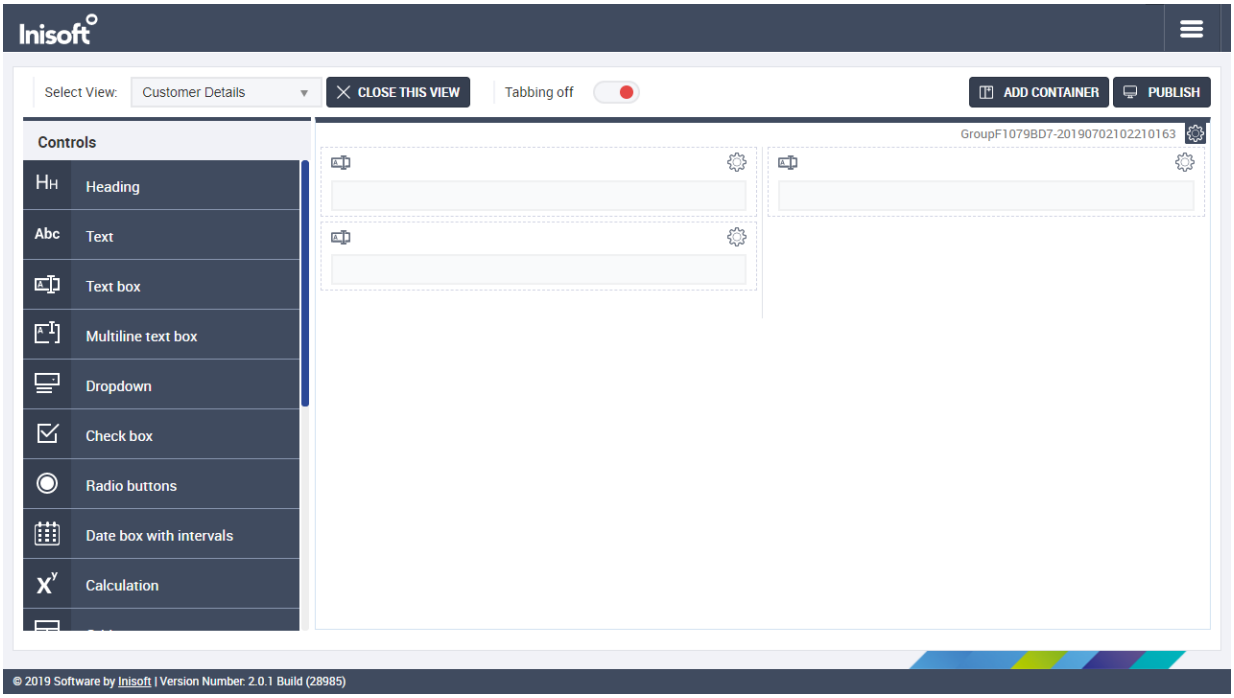
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Remember, just click 

at the top of the screen. This time, select a **50%-50%** container.

6.8.2.2 Adding Text Boxes

Now drag three text box controls (*not* text controls!) to your container so that it looks like this:

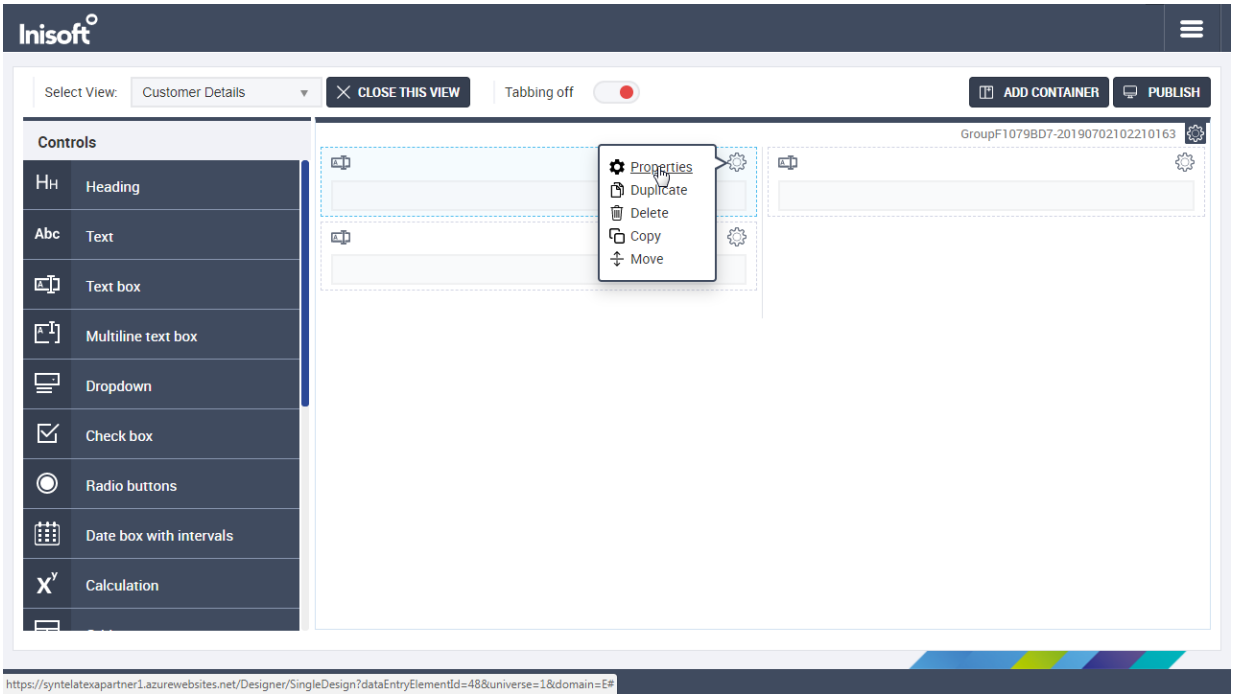


We're going to use these text boxes to hold:

- The customer's first name
- The customer's surname
- The customer's phone number

Let's go! Click the cogwheel of the first text box and select **Properties**.

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Just like in the Desktop Designer, the left-hand **Controls** menu is replaced by a **Control properties** menu.

The first two properties for a text box let you link the text box to a database field. All right, we've been putting it off, but now it's time to say a little about universes.

6.8.2.3 About Universes

Syntelate XA lets you manage one or more **data universes**.

Think about it this way. Every company that uses Syntelate XA will need to store different kinds of data. For example, a retail company stores very different information about their customers than a bank.

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A universe defines things such as the database tables that the agent desktop can access. If you use Syntelate XA with a separate customer relationship management (CRM) system, this is defined in the universe too.

The environment that you're using with this tutorial has already been set up with a data universe called **Agent Desktop**, which has some database tables that you can use. You're going to link your three text boxes to fields in the CONTACT table.

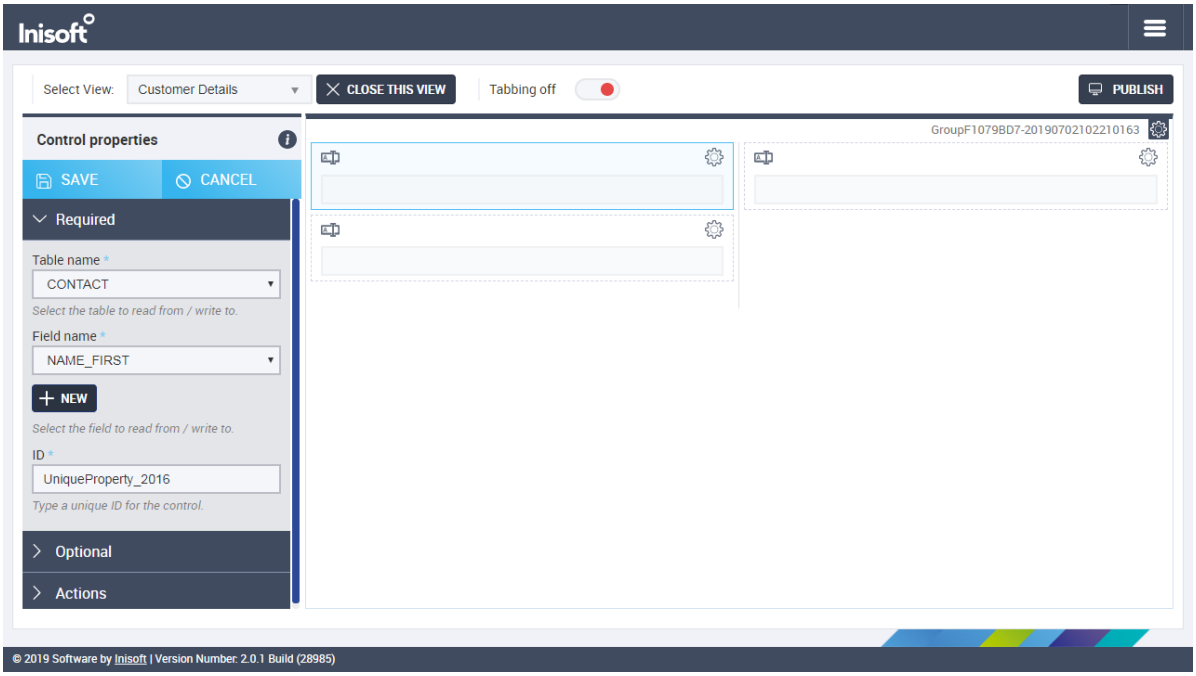
> **Note:** If you're following this tutorial on an environment that has *not* been specially set up to support your learning, the universe you're using may not have a CONTACT table. Alternatively, it may have a CONTACT table but with different fields to those described below.
>
> You'll just have to proceed through the tutorial as best you can.

6.8.2.4 Editing the First Text Box

Back to where we were: the **Control properties** for the first text box.

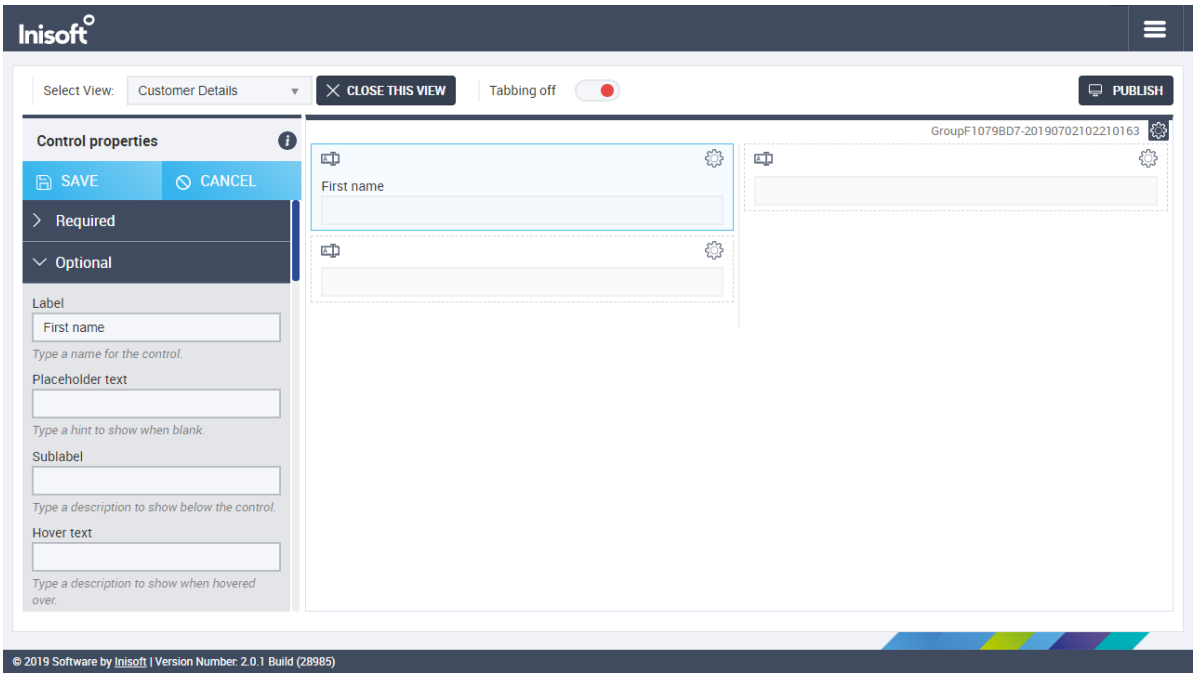
In the **Table name** dropdown, select CONTACT. In the **Field name** dropdown, select NAME_FIRST. The **ID** field is automatically populated.

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Next, click **Optional** to show additional properties.

In the **Label** box, type **First name**.



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Last, click **SAVE** at the top of the **Control properties** menu.

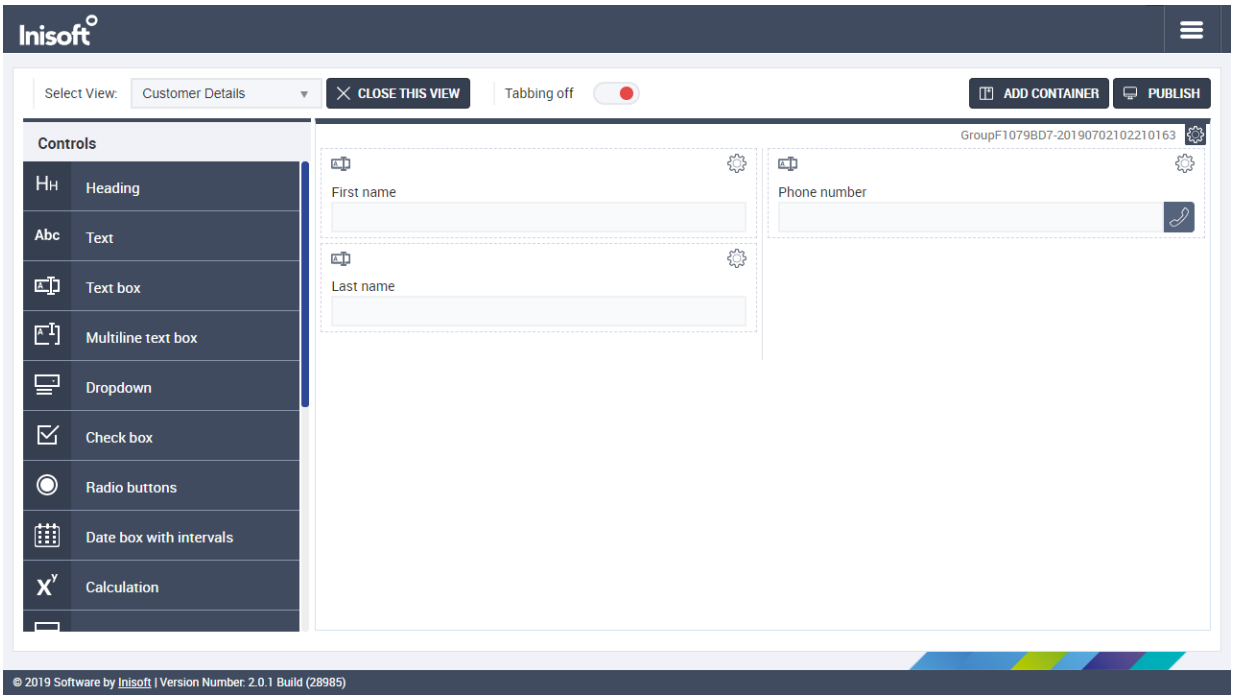
6.8.2.5 Editing the Next Two Text Boxes

Next, edit the other two text boxes using these details:

Table name	Field name	Label
CONTACT	NAME_LAST	Last name
INTERACTION_1	LKTL_NEXTDIALNUMBER	Phone number

In the optional properties for the phone number text box, set the **Text box type** to **PhoneNumber** and set **Dial on click?** to **Yes**.

When you're done, your desktop should look like this:



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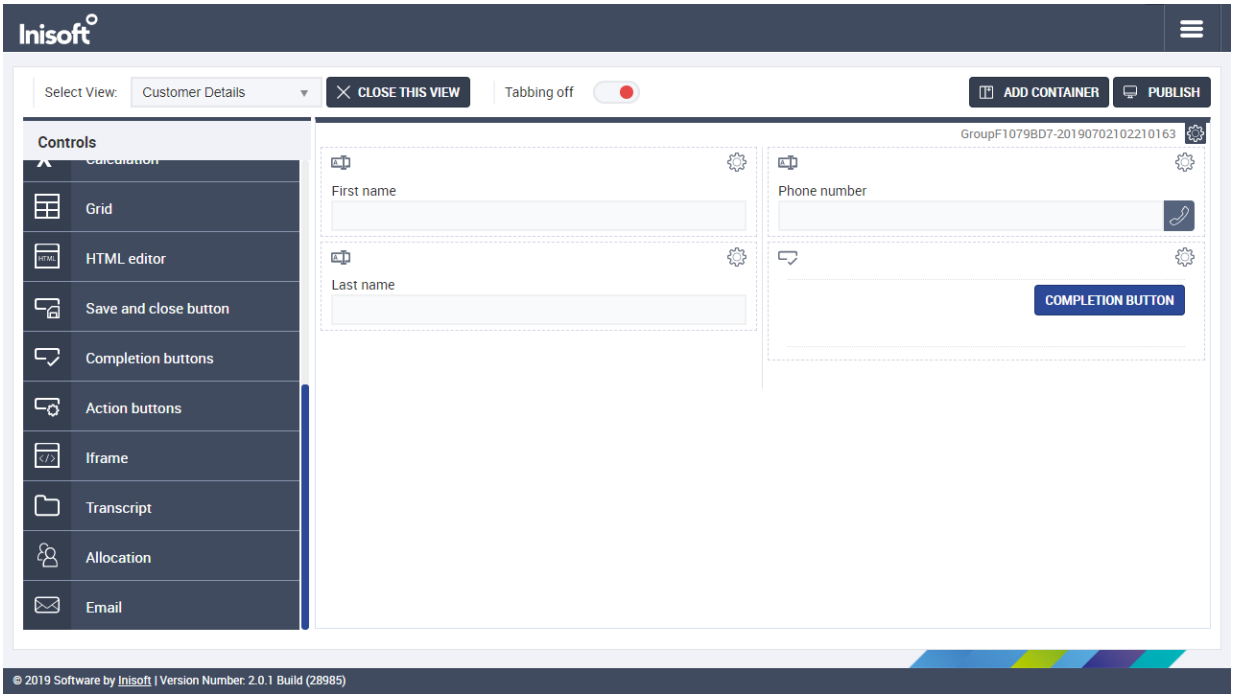
6.8.2.6 Adding a Completion Button

You've now been working in Designer for a while, so it'd be nice to take a look at your desktop as your agents will see it. This should help to put into context all the stuff that you've been doing.

We'll do that soon, but first there's one more thing you need to add to your desktop: a completion button.

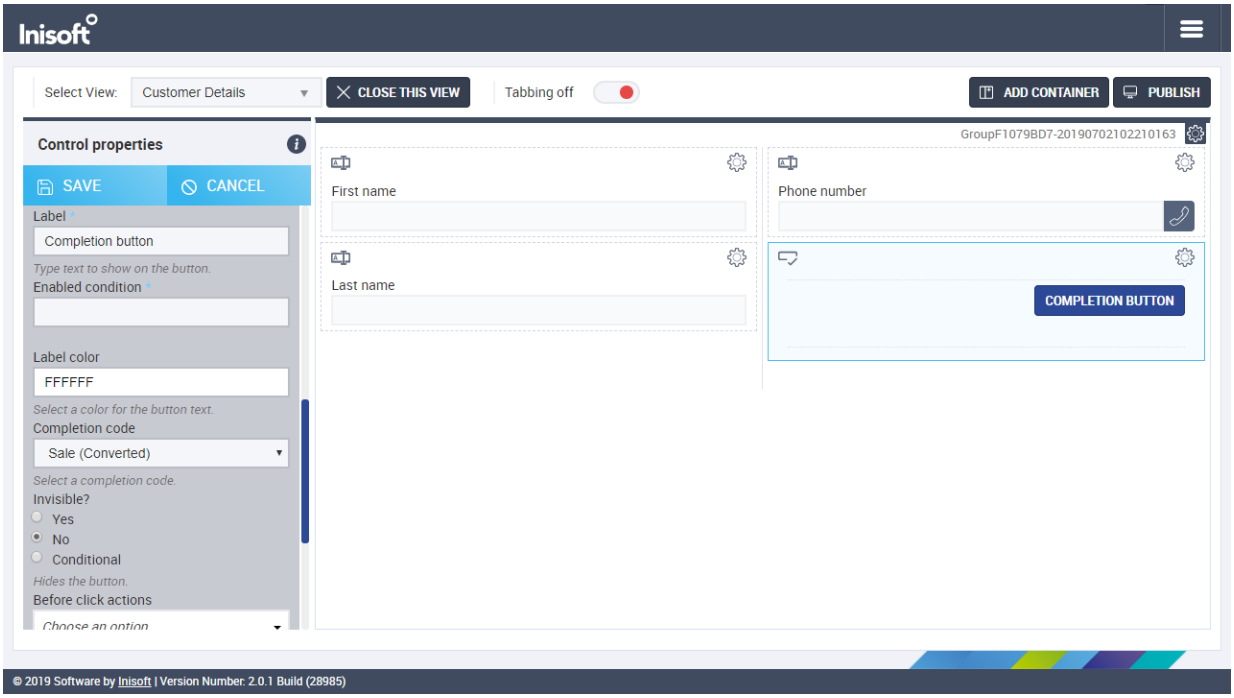
When an agent has finished speaking with a customer and has finished updating the customer's record, the agent clicks a **completion button**. This closes the customer's record and makes the agent available to be passed another call. You always need to include at least one completion button on an agent desktop.

OK, drag a completion buttons control under the phone number as so:



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Just as with a text box, you can edit the properties of a completion buttons control. Do this, and edit the **Completion code** optional property to **Sale (Converted)**. Click **SAVE**.



> **Note:** If you're following this tutorial on an environment that has *not* been specially set up to support your learning, the **Sale (Converted)** completion code may not be available. If that's the case, you'll just have to use a different completion code.

6.8.2.7 Closing the Data Entry Element

Next, click CLOSE THIS VIEW. The tab in your browser will close, and you'll see the Desktop Designer again.

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> **Note:** If you're following this tutorial on an environment that has *not* been specially set up to support your learning, you'll need to take an extra step here.
>
> Drag a menu control onto your desktop, to the left-hand (25%) container. Edit the control's properties to give it a title like **Record creator**. Under **Items**, set **Item** to **Interaction record** and **Title** to **New record**.

In the Desktop Designer, click **SAVE** in the **Control properties** menu to close it, and then click 

to close the desktop too.

In the next chapter, we'll quickly go through updating your workzone. That's the last thing we need to do before we can test your desktop as your agents will see it.

6.8.3 Designing a Desktop

It's time to design our desktop. The **desktop**, of course, is the interface that agents see when handling calls or other types of interaction.

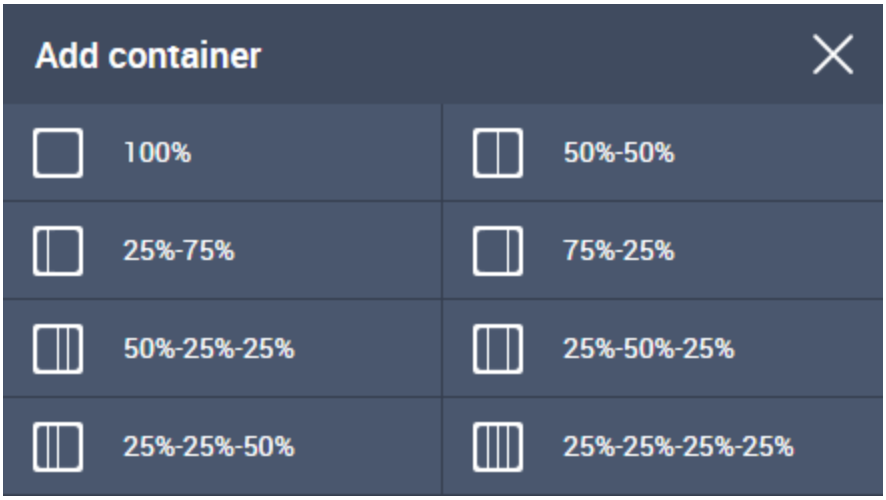
6.8.3.1 Adding a Container

The first thing you need to do is add a **container** to your desktop. A container lets you organize desktop controls into columns. This will make sense once you see it, so let's just go ahead and do it.

Click 

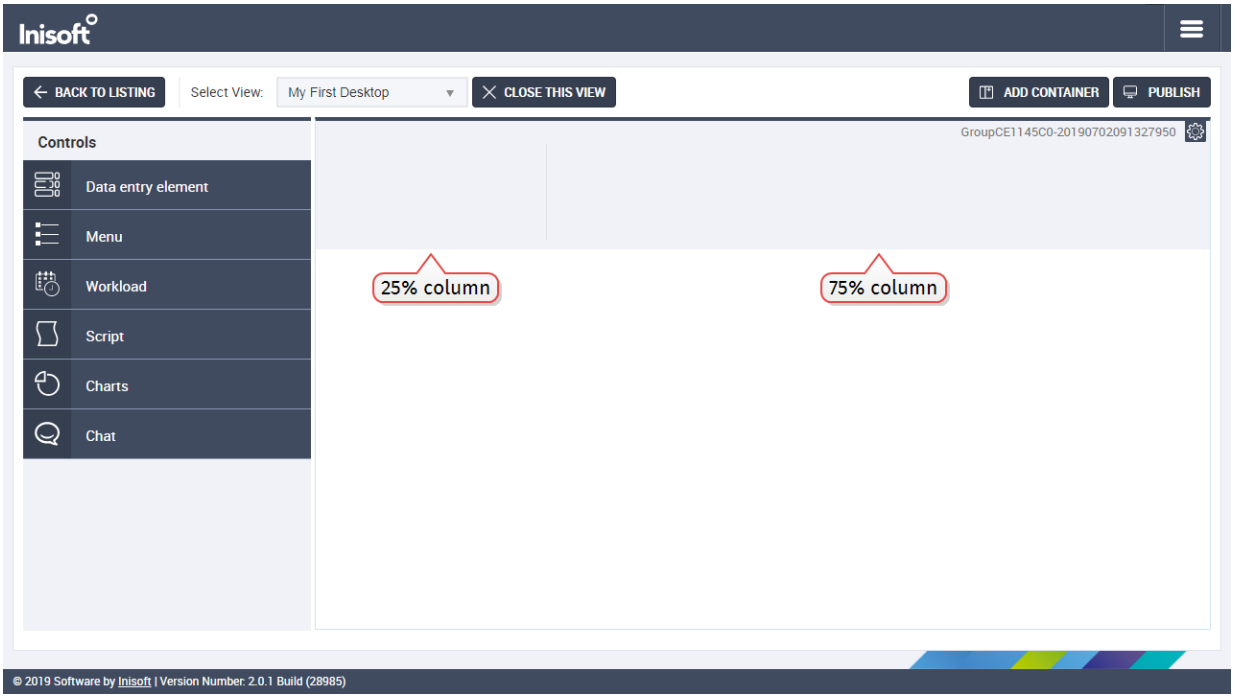
. You'll be presented with various choices:

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Click **25%-75%**.

A two-column container is added to your desktop. The left-hand column of this container will take up a quarter of the horizontal space on the agent's desktop, while the right-hand column will take up three-quarters of the space.



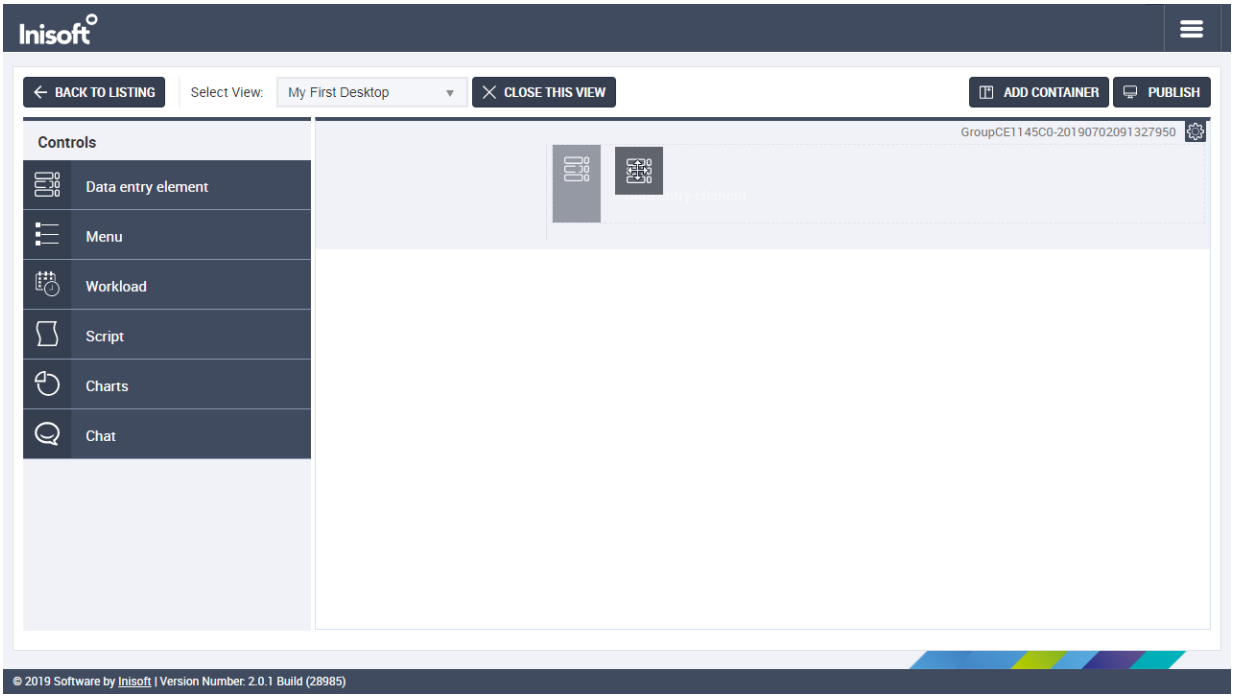
© Inisoft Ltd 2025

6.8.3.2 Adding a Data Entry Element

Now let's add a control to our desktop: we'll add a data entry element.

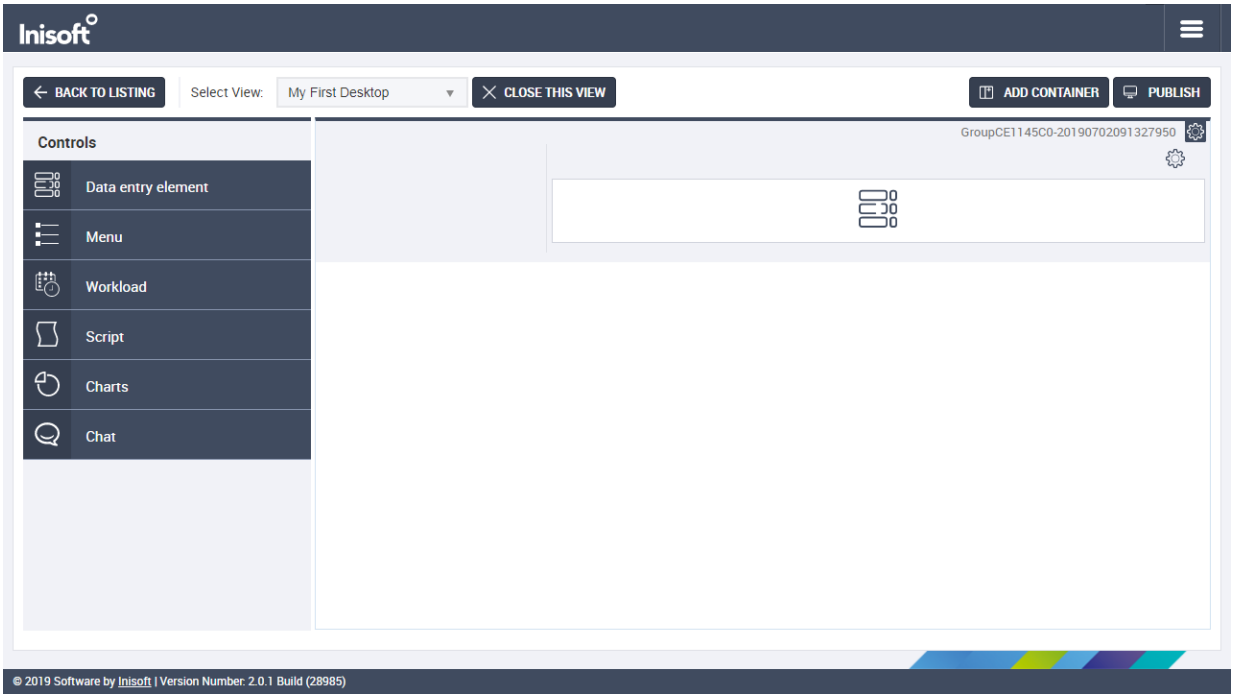
A **data entry element** lets agents enter and view details, such as the customer's information. It actually also has other uses, but let's not get ahead of ourselves – we can talk about those later.

In the left-hand **Controls** menu, click and drag a data entry element to the right-hand column of your container.



When you let go, an empty data entry element is added to your desktop.

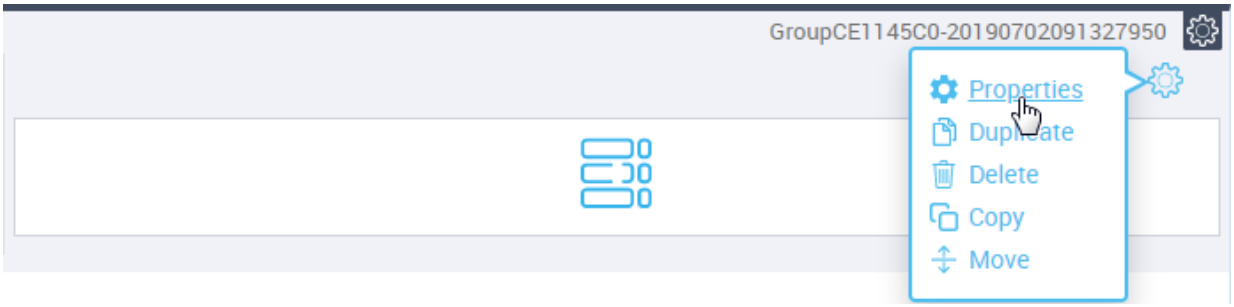
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6.8.3.3 Viewing a Data Entry Element

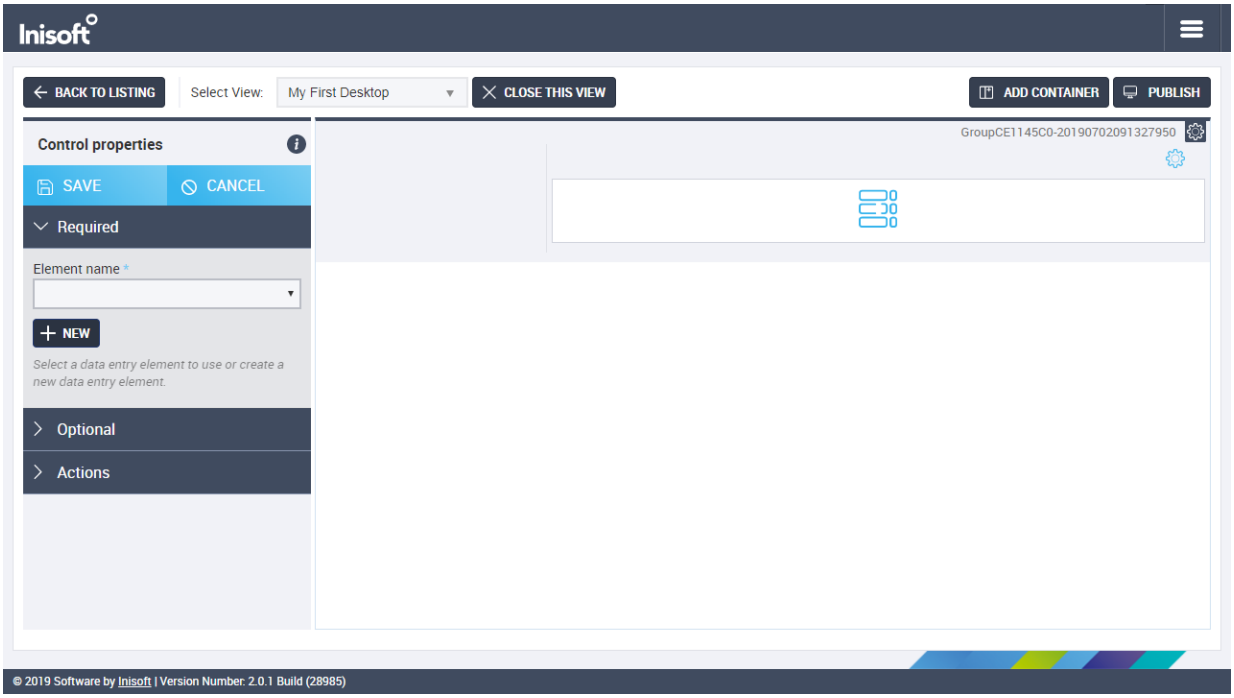
We now have to set the data entry element that we want to use. We do this by editing the control's properties.

Click the cogwheel on the data entry element to show a menu, and then click **Properties**:



The left-hand **Controls** menu is replaced by a new **Control properties** menu:

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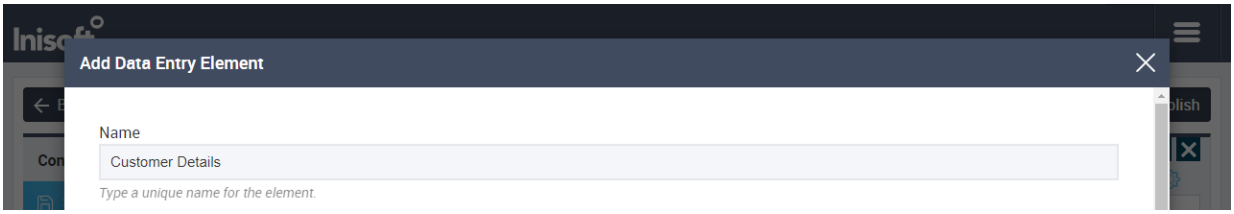


In the **Element name** dropdown, you can select an existing data entry element, but let's not do that – let's create a new one!

Click 

.

You'll be asked to type a name for the data entry element. We're going to use this data entry element to hold customer details, so type **Customer Details** (or something similar).



Next click **SAVE**. You'll be asked whether you want to view the data entry element now. Click **YES**.

A new tab will open in your browser, and an empty data entry element will show.

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You've now jumped from the **Desktop Designer** (which you selected at the very beginning) to the **Data Entry Designer**. You'll notice that the interface looks very similar – that's to keep things simple!

In the next chapter, we'll look at designing a data entry element.

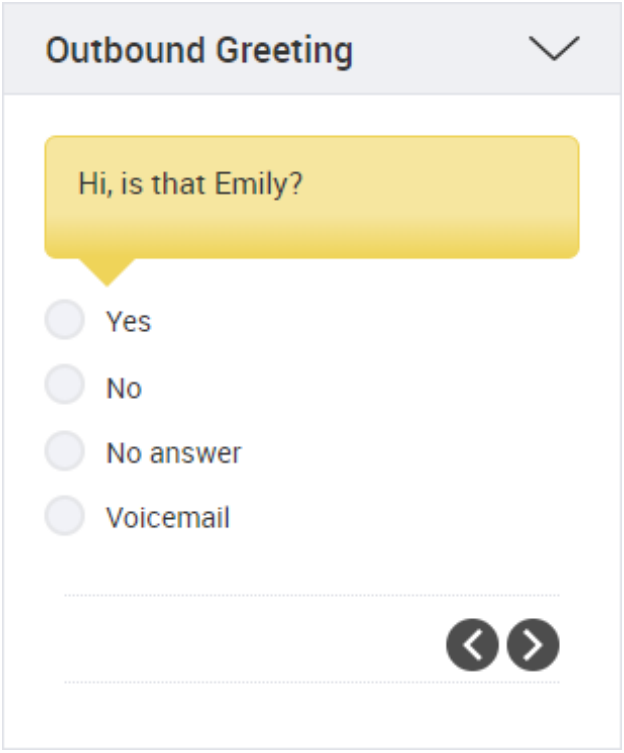
> **Note:** Some browsers block pop-ups, which can prevent your browser from opening the Data Entry Designer in a new tab. If you're having problems, check your browser's settings.

6.8.4 Designing a Script

Let's add a simple script to our desktop.

A **script** tells agents what to say and do during a call. It also defines the different paths that each call can go down.

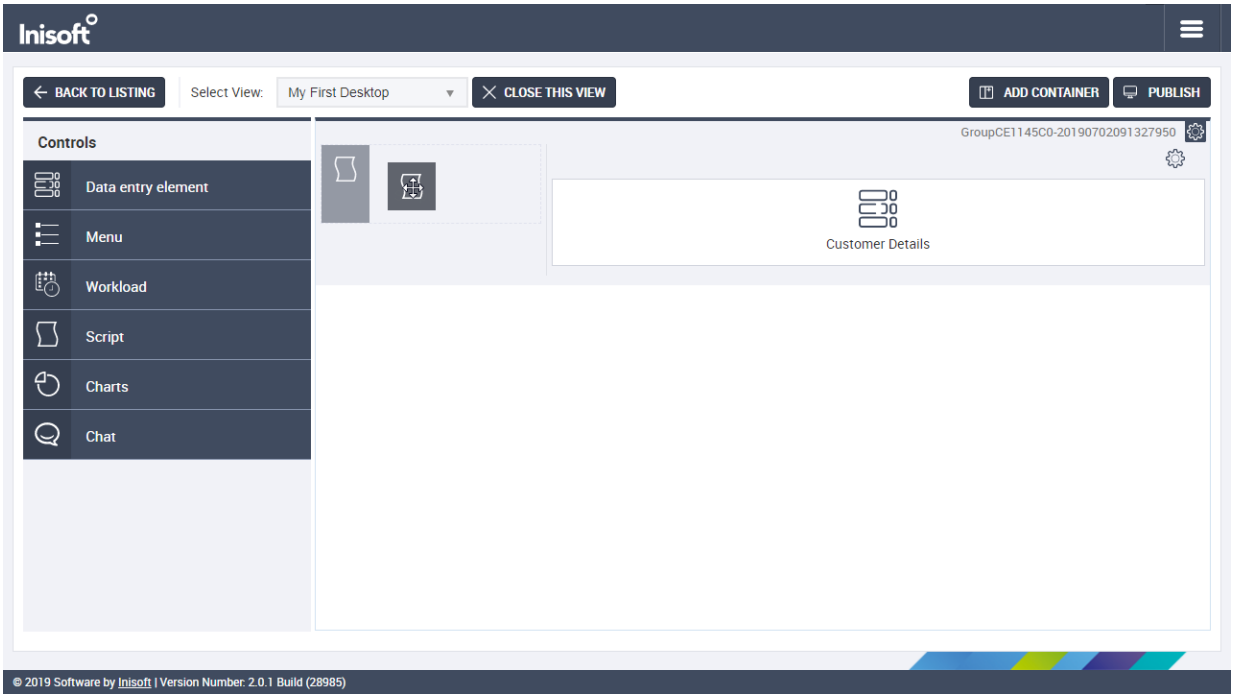
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6.8.4.1 Adding a Script

With your desktop open in the Desktop Designer, click and drag a script control to the left-hand column of the container.

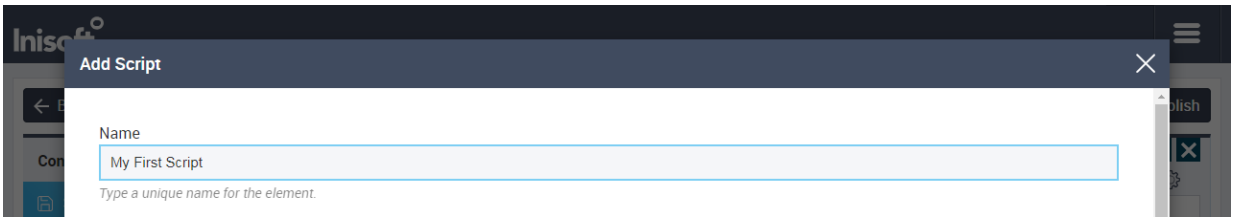
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6.8.4.2 Viewing the Script

Click the cogwheel on the script and select **Properties**.

Create a new script called something like **My First Script**, and choose to edit it now.



A new tab will open in your browser, and an empty script will show.

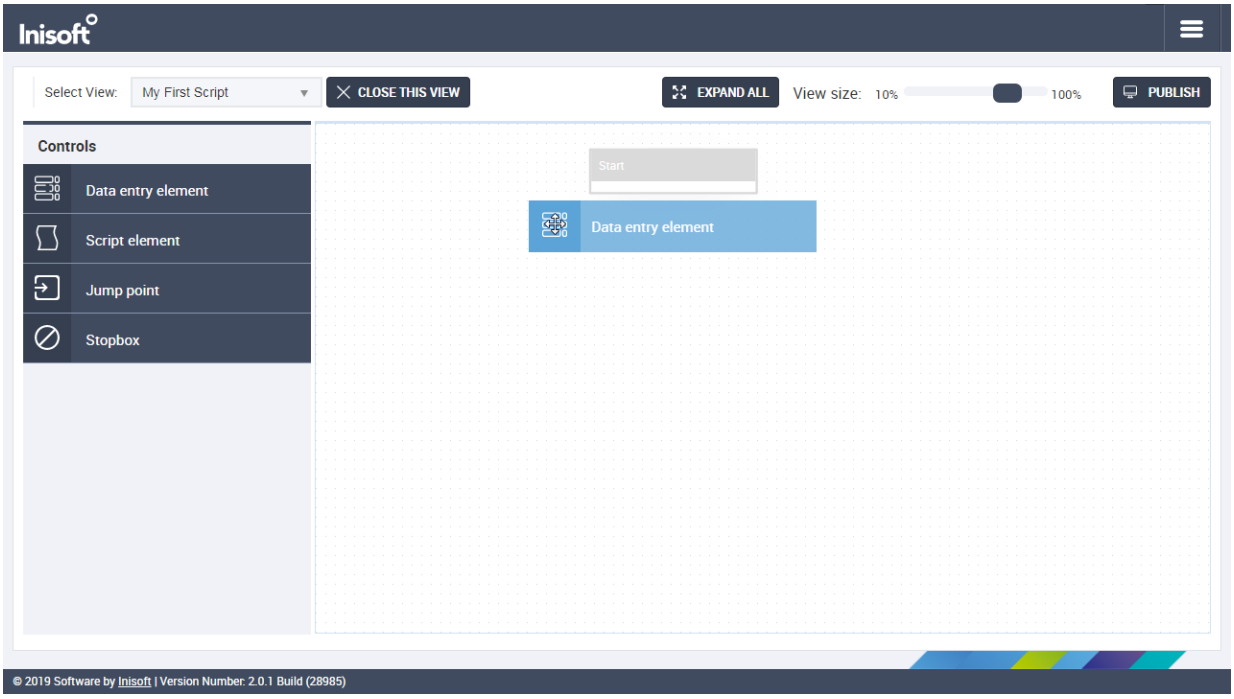
You've now jumped from the **Desktop Designer** to the **Script Designer**.

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6.8.4.3 Creating Your First Script Box

You may remember, back when we first talked about data entry elements, we said that they had other uses than just letting agents view and enter customer data. One of those uses is in scripts!

Let's see that now. From the left-hand **Controls** menu, drag a data entry element to the **Start** box.



Click the cogwheel on this script box and select **Properties**.

Create a new data entry element called something like **Outbound Greeting**, and choose to edit it now.

You'll jump from the Script Designer to the Data Entry Designer.

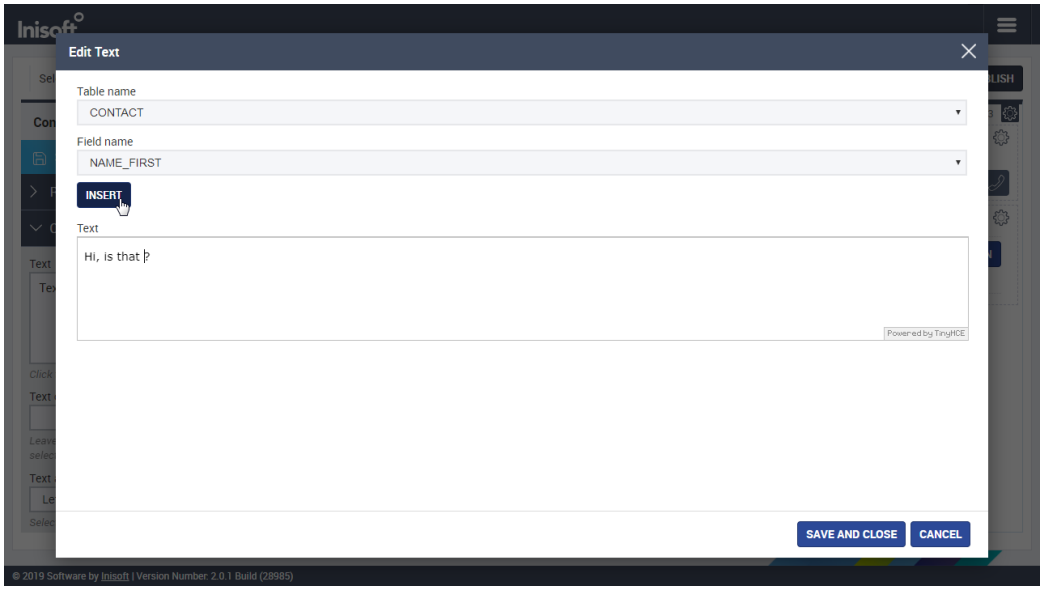
Next, follow these instructions:

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1. Add a 100% container to your data entry element.
2. Add a text control (*not* a text box control!) to this container.
3. Set the **Text** property of this control to: *Hi, is that [CONTACT.NAME_FIRST]?*

   At runtime, Syntelate XA will automatically insert the customer's first name.

> **Tip:** Use the dropdowns to insert the reference to the customer's first name.



4. Set the **Text type** of this control to **Speech**. This indicates that the agent should read out these words as is.
5. Add a radio buttons control after the text control.
6. Associate the radio buttons control with the CALL_TOUCH field in the INTERACTION_1 table.

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7. Edit the optional **Items** property of the radio buttons control so that it looks as so:

Value	Text
Y	Yes
N	No
NO_ANS	No answer
VMAIL	Voicemail

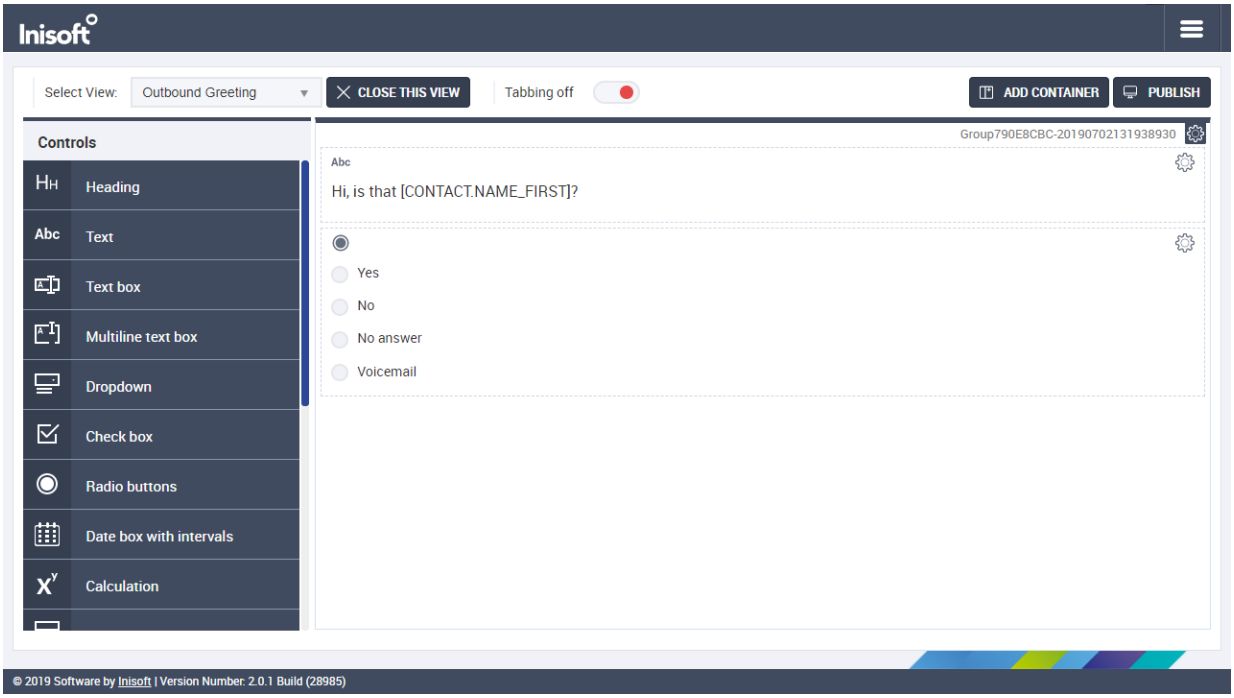


Tip: The **Text** field is the radio buttons text that the agent sees in Syntelate XA. The **Value** field is what is written to the CALL_TOUCH field in the INTERACTION_1 table.

You could use any values here, so long as they're distinct. In a moment we'll reference these values from our script.

When you're done, your data entry element should look like this:

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Now click  to return to your script.

6.8.4.4 Expanding the Script

In our first script box, we've added four possible options. Either:

- The agent has got through to the right person.
- The agent has *not* got through to the right person.
- The customer did not pick up.
- The call has gone through to voicemail.

In our script, we now need to create branches for each of these four possibilities. This is done by defining **exit conditions**.

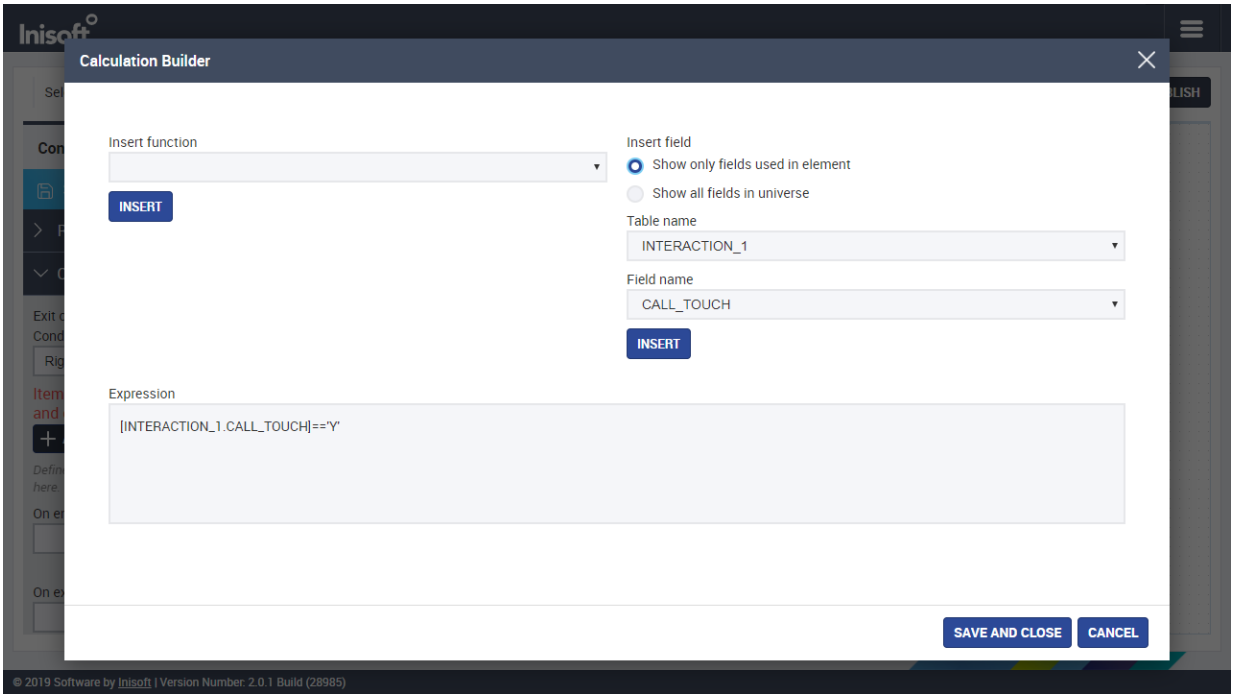
In the properties for the first script box, add four exit conditions as so:

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Condition name	Condition
Right-party contact	[INTERACTION_1.CALL_TOUCH] =='Y'
Incorrect-party contact	[INTERACTION_1.CALL_TOUCH] =='N'
No answer	[INTERACTION_1.CALL_TOUCH] =='NO_ANS'
Voicemail	[INTERACTION_1.CALL_TOUCH] =='VMAIL'

The **condition name** shows in your script in the Designer and helps you to easily follow what's going on. It won't show to agents, so you can really enter whatever is most helpful for you.

The **conditions** here match up with the radio buttons that you added to the data entry element. To add conditions, you'll use the **Calculation Builder**.



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When you've added your four exit conditions, your script will look like this:

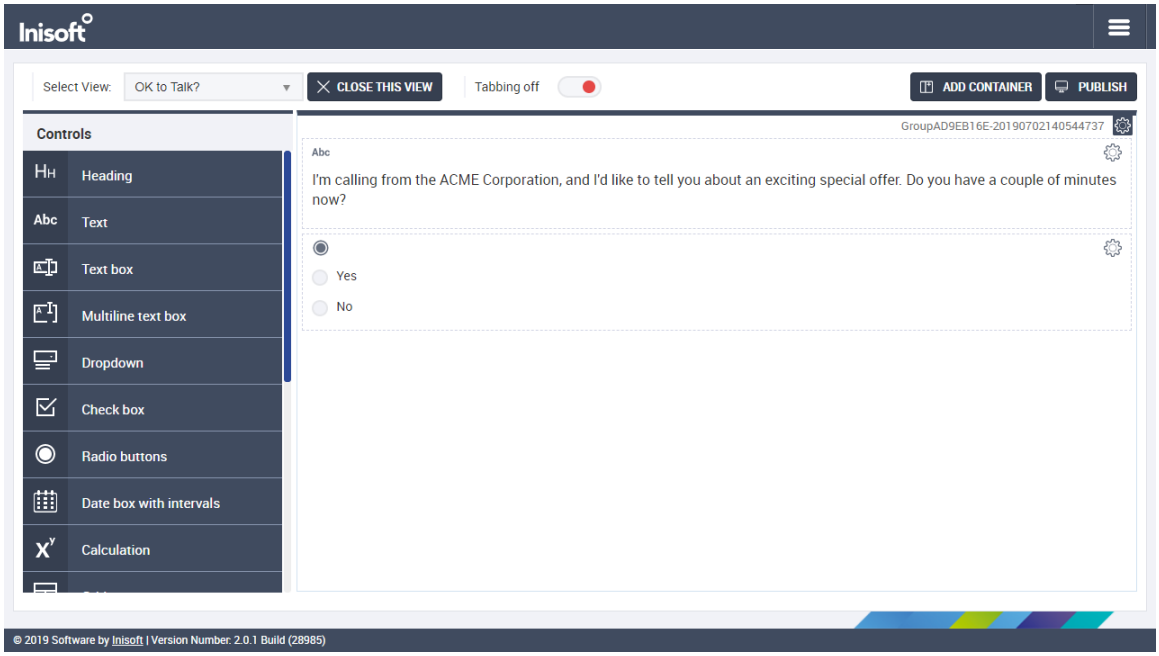


6.8.4.5 Further Expanding the Script

Hopefully you're starting to get a feel for how scripts works in Syntelate XA. Now let's work further on the right-party contact route.

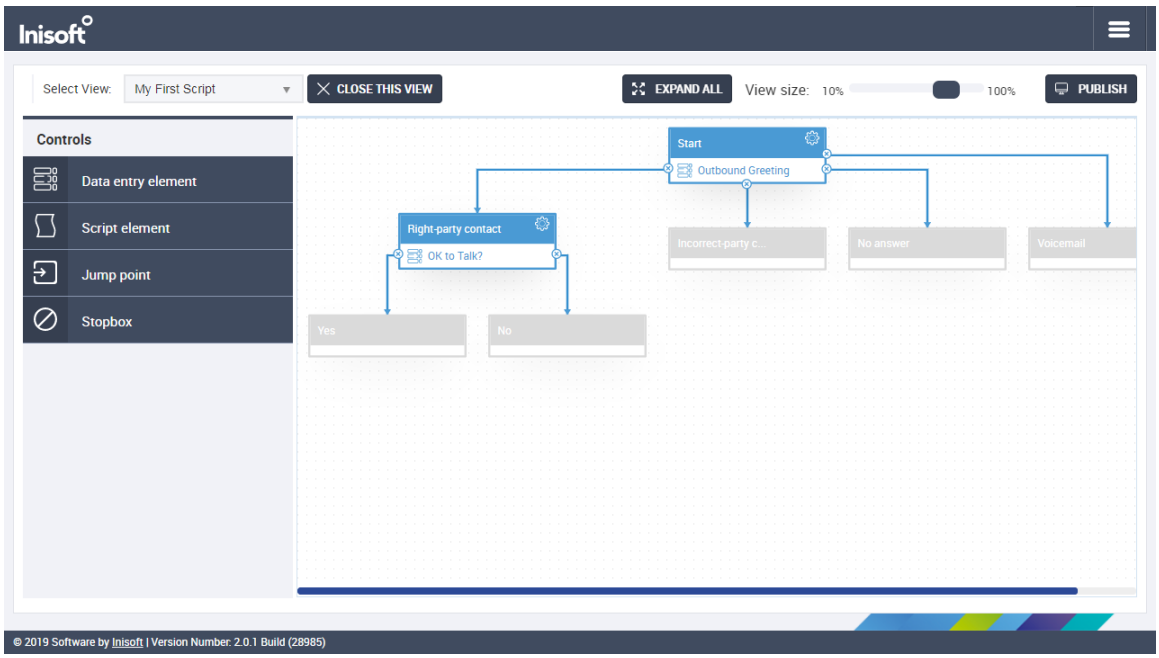
Add a new data entry element that looks like this:

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Link the radio buttons to field CALL_OK_TO_TALK in INTERACTION_1.

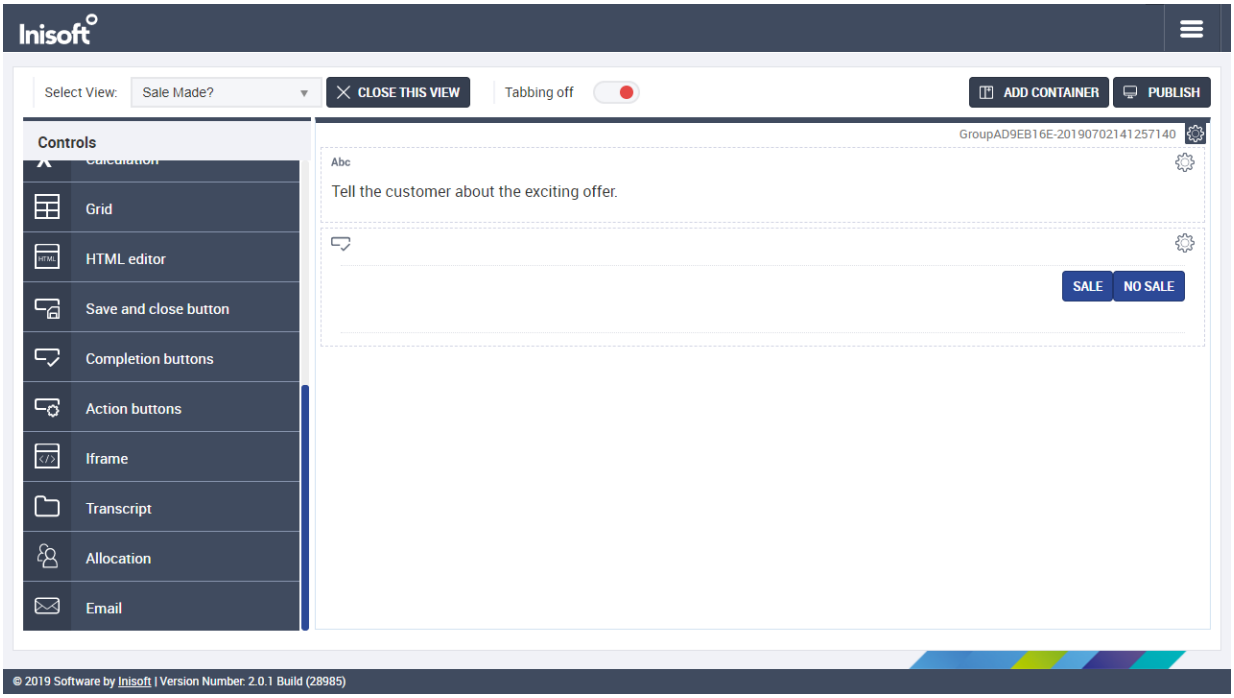
Add new exit conditions so that your script looks like this:



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6.8.4.6 The Sale / No Sale Script Box

Add a new data entry element with two completion buttons that looks like this:



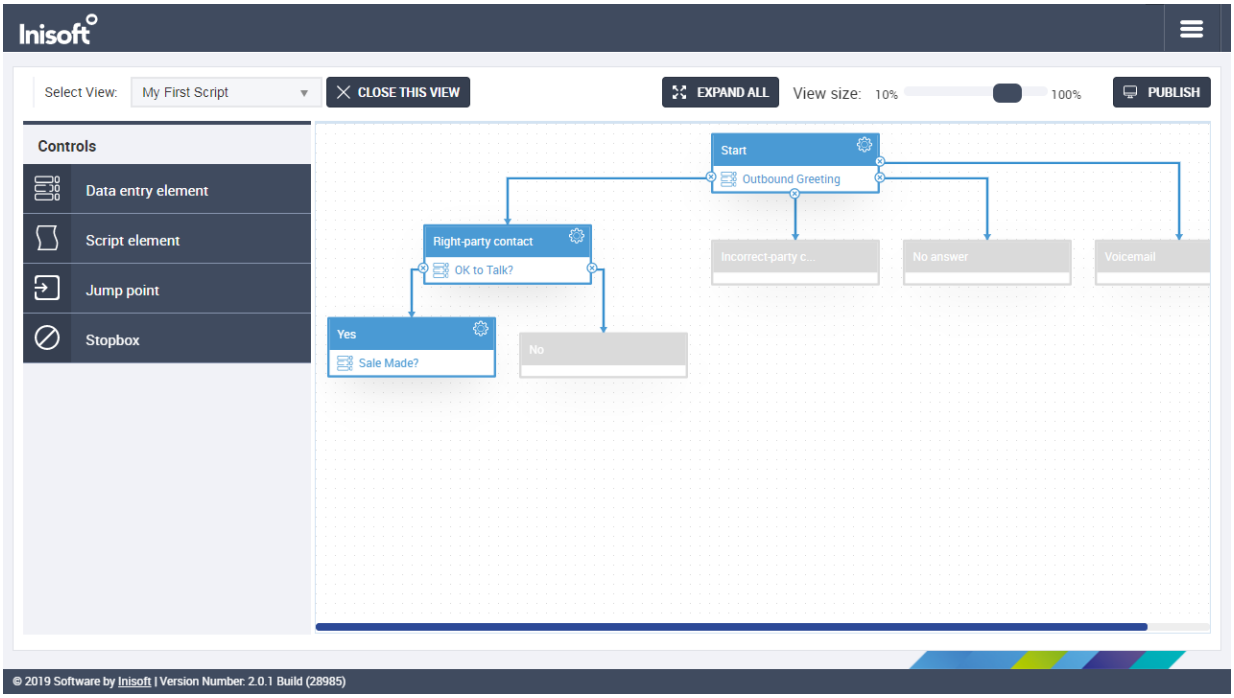
This time, for the text control, set the **Text type** property to **Instruction**. This indicates that the text is an instruction to the agent (rather than text to be read out to the customer).

Associate one completion button with the **Sale (Converted)** completion code and the other with the **No Sale** completion code.

> **Tip:** Edit the **Label** property to change the text shown on a completion button.
>
> To add a second completion button, click **+ ADD** at the bottom of the **Control properties** menu.

When you're done, your script should look like this:

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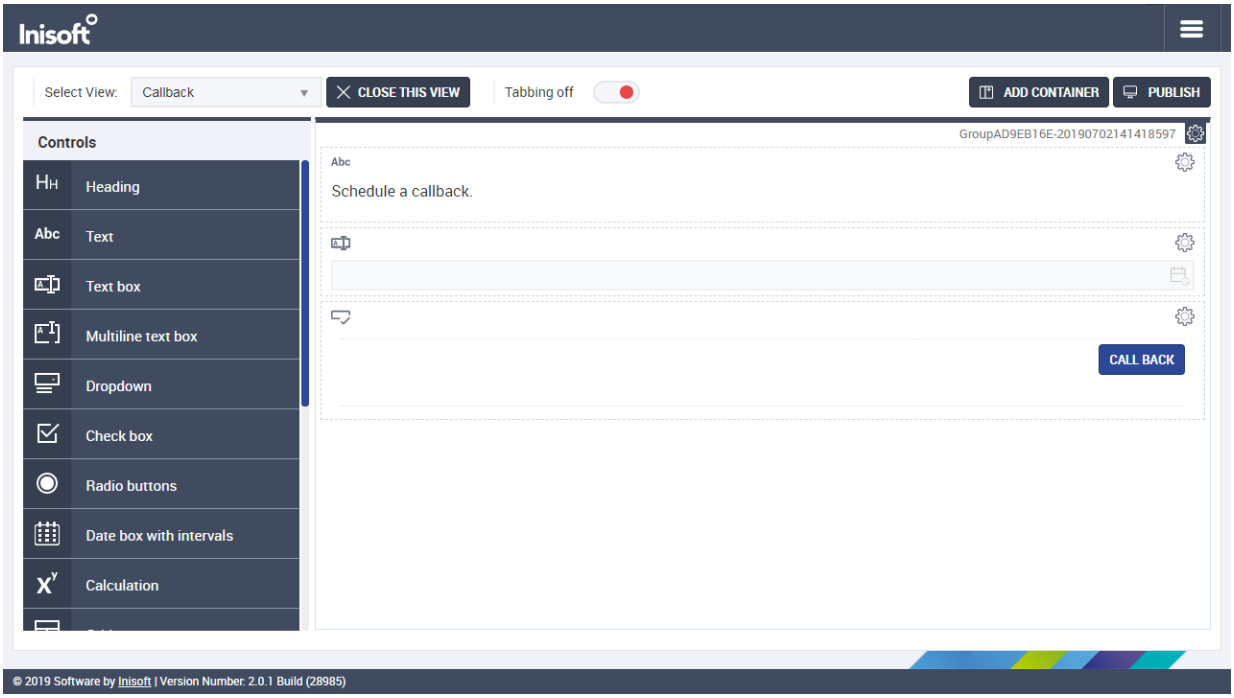


6.8.4.7 Finishing the Script

All right, let's now quickly finish off our script. To cover all the other possible branches, we'll create a single data entry element that lets the agent schedule a callback.

Drag this data entry element onto the **Right-party contact > No** box (although, for the record, you could really drag it onto any of the empty script boxes). The data entry element should look like this:

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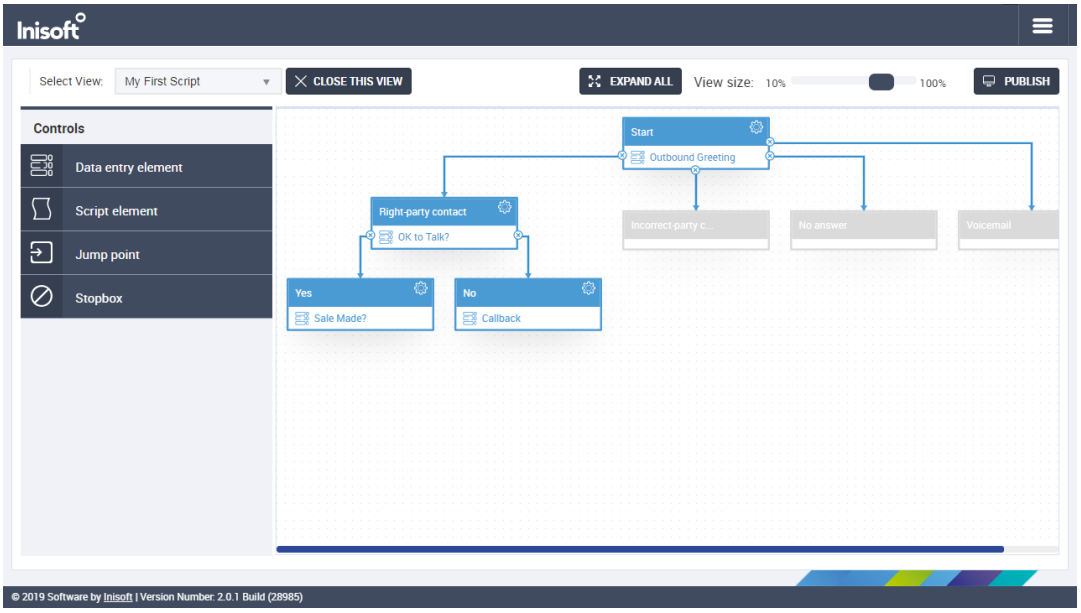


The middle control is a text box linked to field LKTL_RETRYAFTER in table INTERACTION_1. Set the **Text box type** property of this control to **DateTime**. This allows the agent to select a date and time via a date and time picker.

Set the **Completion code** property of the completion button to **Call Back**.

Your script will now look like this:

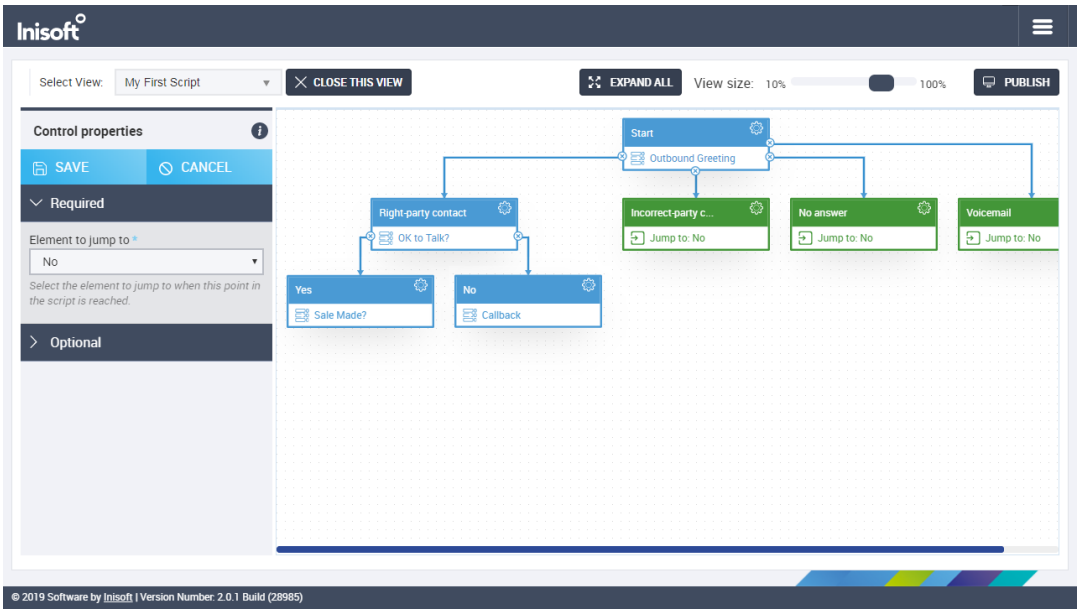
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Now let's make use of **jump points**!

Drag jump point controls to each of the remaining empty script boxes. For each jump point, set the **Element to jump to** property to the **No** exit condition.

Your finished script should look like this:



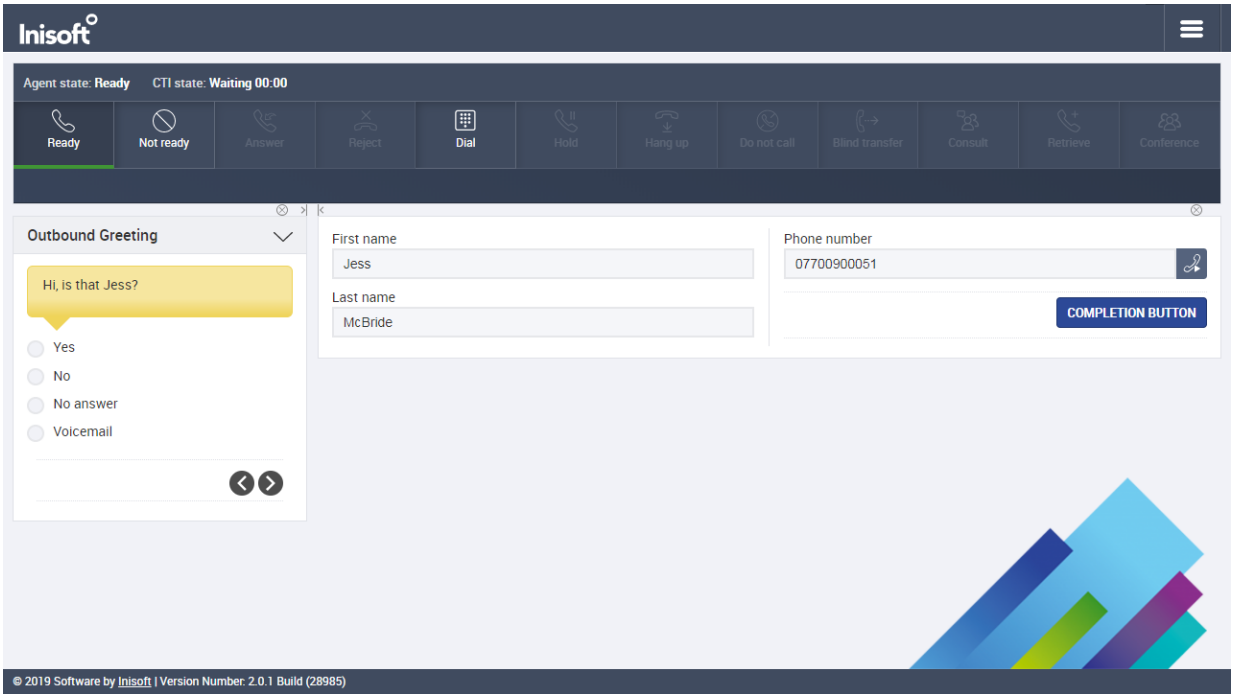
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6.8.4.8 Testing the New Stuff

Phew!

Close your script and go back to the desktop. Publish it again to write the changes that you've made to runtime.

Now go back to runtime and test your script!



Try going through a number of different records, each time choosing a different path down the script.

Of course, this is a very simple script, but you should be getting an idea of what is possible in Syntelate XA.

In the next chapter, we'll finish up by looking at some other features.

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6.8.5 Other Features

You've now created a really simple desktop with a script. By following the steps in this chapter, you'll get a quick look at some of Syntelate XA's other features.

This tutorial is by no means comprehensive, of course, and Syntelate XA has many more features than can be described here. But once you've finished this chapter, you should have a good understanding of the core concepts and be ready to explore Syntelate XA further yourself.

6.8.5.1 Removing the Completion Button

In the last chapter we added completion buttons to a script, but our original completion button is still there on the **Customer Details** data entry element. We don't need this anymore, so open this data entry element and delete it (click  and then **Delete**).

By the way, you'll remember that in the last chapter we associated each of the three completion buttons with a completion code. This makes it easy to monitor the outcome of all calls. In our simple script, based on the completion button that the agent clicks, you can tell whether each call resulted in:

- A sale
- No sale
- A callback

In Syntelate XA, you could report on this in a dashboard, for example. Syntelate XA provides lots of features for reporting on the operation of your contact center – but that's not within the scope of this tutorial.

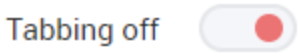
© Inisoft Ltd 2025

6.8.5.2 Tabbed Data Entry Element

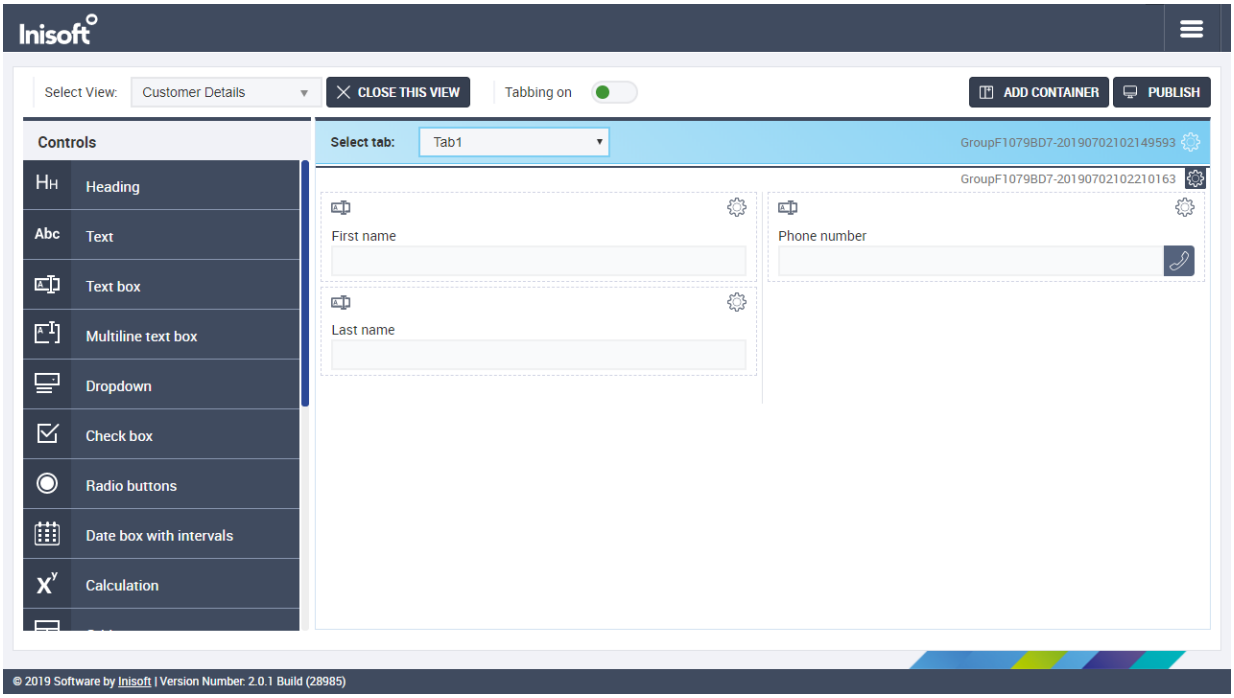
A data entry element can have multiple tabs, each displaying different information.

Seeing as you've got the **Customer Details** data entry element open anyway, let's add a couple of new tabs to this.

First, click the tabbing toggle at the top to turn tabbing on:



Your data entry element should now look like this:



On the new blue bar, click  to edit the tabs. Add two new tabs so that your list of tabs looks as follows:

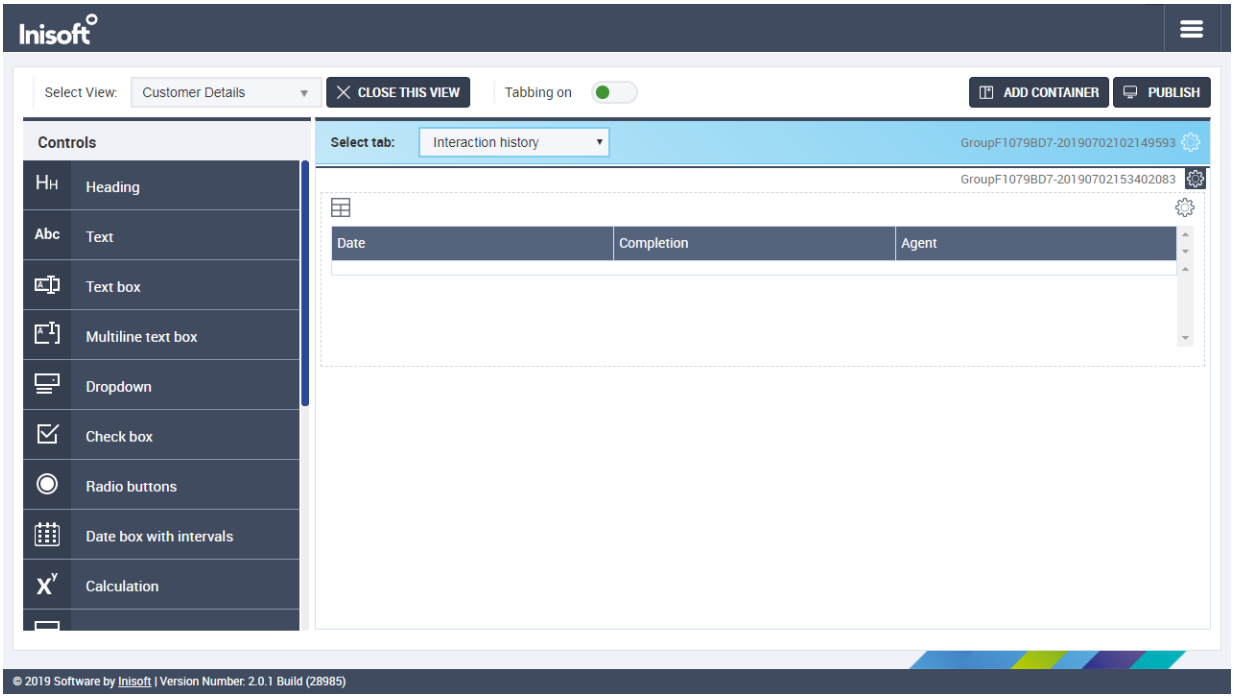
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Tab name	Order
Customer details	1
Interaction history	2
Sales promotion	3

6.8.5.3 Grids

On the **Interaction history** tab, add a grid control.

Rather than create a new grid, let's just use an existing grid: in the grid's properties, select **History of Current Interaction** as the **Grid name**.



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At runtime, this will show a table (or “grid”) containing information about previous attempts to contact the customer. In your environment, this will be filled with nonsense data, but you’ll get the idea.

Anyway, let’s make some more changes before we test things out at runtime.

> **Note:** If you’re following this tutorial on an environment that has *not* been specially set up to support your learning, the **History of Current Interaction** grid may not be available to you.

6.8.5.4 Iframes

On the **Sales promotion** tab, add an iframe control. This lets you embed another web page into your agent desktop.

In a real environment, this would be handy where, say, your agents need to use another web application alongside Syntelate XA. Rather than your agents having to toggle between Syntelate XA and the other web application, you could simply embed the other application into Syntelate XA.

For now, though, let’s just embed a Wikipedia page in your agent desktop. This may not be something you’d ever do in a live environment, but at least it will give you a feel for how iframes work!

Edit the iframe’s properties and set the **Default source** property to https://en.wikipedia.org/wiki/Sales_promotion.

All right, that’s us finished in this data entry element, so you can close it.

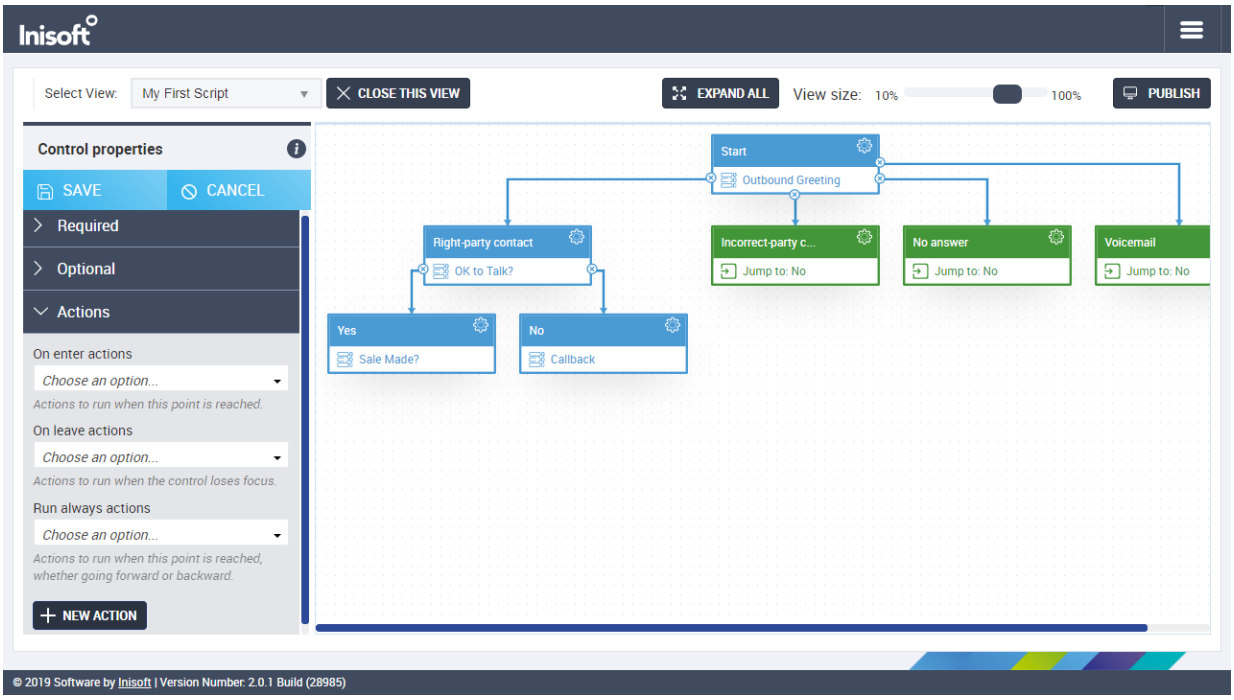
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6.8.5.5 Action to Activate Tab

There's a really powerful feature of Syntelate XA that we've not mentioned yet. No introduction to Syntelate XA would be complete without a bit on actions, though, so we'll finish by adding a few actions to your desktop.

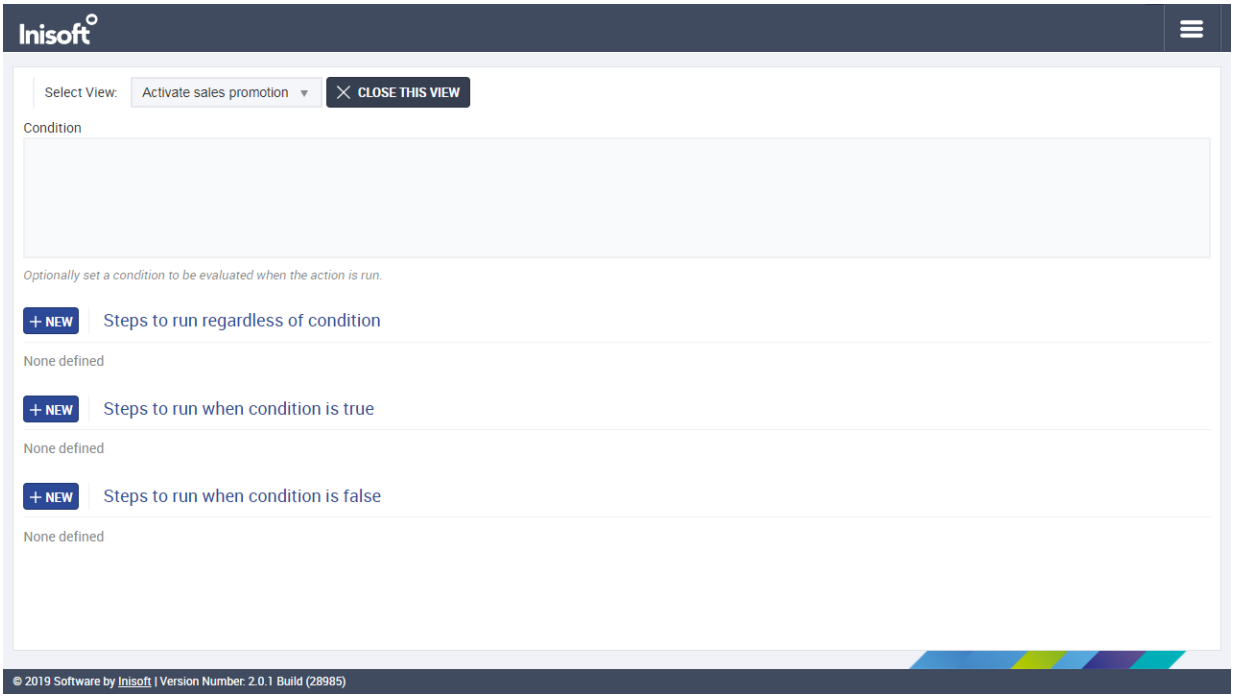
Open your script and edit the properties of the **Right-party contact > Yes** script box.

Expand the **Actions** property group, and click + NEW ACTION at the bottom.



Call your action something like **Activate sales promotion tab**, and click **SAVE**. Choose to edit this now. You'll jump from the **Script Designer** into the **Action Builder**.

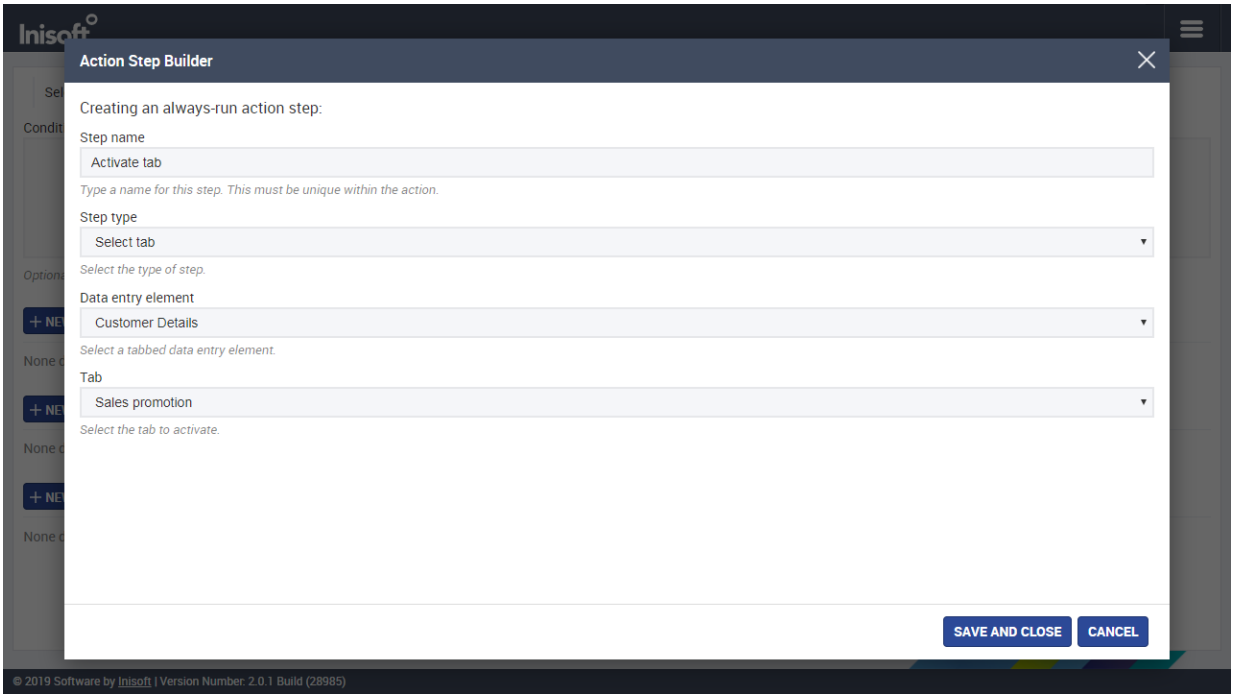
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We'll talk about conditions later. For now, click + NEW beside **Steps to run regardless of condition**.

Create a step like this:

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Step name	Activate tab
Step type	Select tab
Data entry element	Customer Details
Tab	Sales promotion

Click **SAVE AND CLOSE**, and then click 

to close the Action Builder and jump back to the Script Designer.

Still in the properties of the **Right-party contact > Yes** script box, select your new action for **On enter actions**.

What does all this mean? It means that, at runtime, when your script reaches this script box, this action is run – and the **Sales promotion** tab is automatically activated.

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Hopefully that makes sense, but if not, it will once you try it out at runtime.

6.8.5.6 Action to Validate Callback

Before we finish up, let's add a couple more actions. These are to tackle problems that you may have noticed in the last chapter, when you tried out your script.

Did you try setting a callback? If so, you may have noticed that it's possible to set a callback in the past. That's a bit silly, right? We should add some validation to prevent this, and we can do this via an action.

Open the **Callback** data entry element, and edit the properties of the completion button. Here, too, there is a 

button at the bottom. Click this, and create a new action called something like **Check callback is in future**.

We've not used the **Condition** box in the Action Builder yet – so let's give it a shot!

A **condition** is something that is evaluated when the action is run. You can perform action steps based on the result of this evaluation.

We want a condition that assesses whether the callback date and time is in the future and prevents the completion of the call if it's not. Here's how we'll go about doing that.

In the **Condition** box, enter: `[INTERACTION_1.LKTL_RETRYAFTER] > now()`

You can use the dropdowns to insert the database field and the function `now()`. This condition will evaluate as true when the LKTL_RETRYAFTER field is greater than the current date and time.

Next, add two condition-false steps as so:

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Step name	Step type	Message
Show validation error	Show message	The callback must be in the future!
Cancel completion	Stop completion	N/A

These action steps are run when the condition is false – in other words, when the LKTL_RETRYAFTER field is set to a date and time in the past.

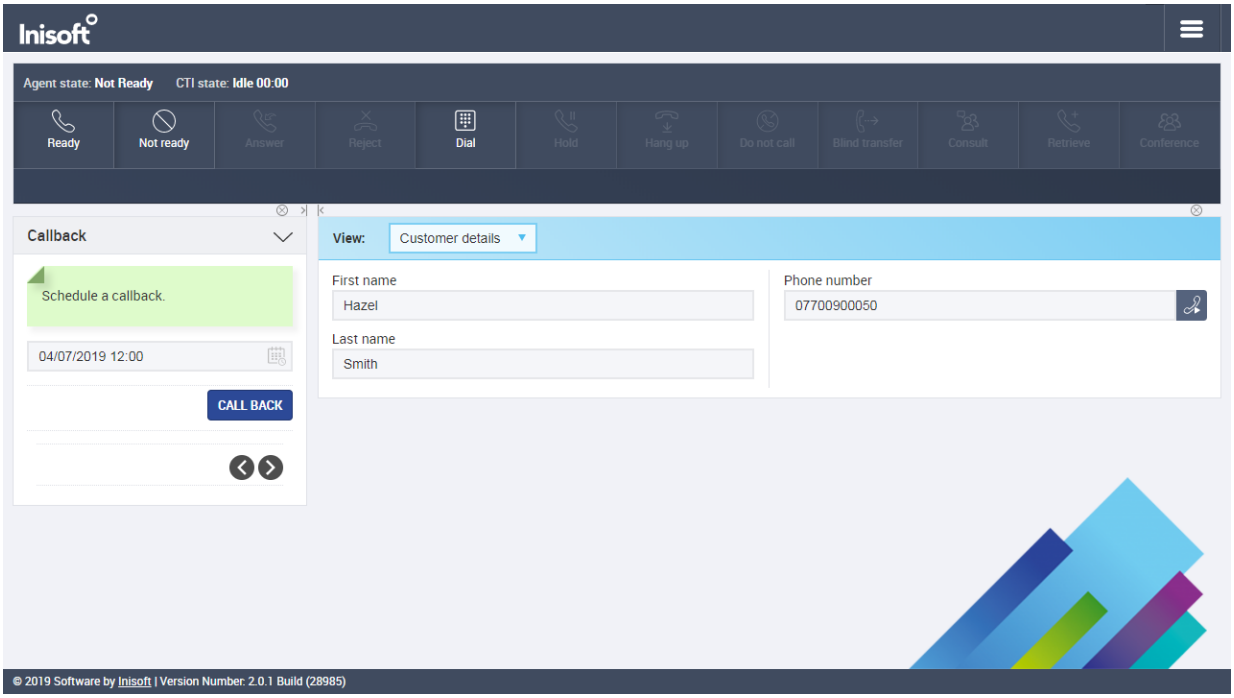
Back in the Data Entry Designer, add your new action to the **Before click actions** property of the completion button. Any actions here run when the agent clicks the button but *before* Syntelate XA processes this. As such, this is where you should put any validation.

6.8.5.7 Expanding Our Validation Action

If at runtime you tried setting a callback for, say, a minute in the future, you may have found that at the callback time Syntelate XA didn't pass you the record that you expected but instead passed you other records to work on. We can fix this by increasing the priority of the callback record, so that Syntelate XA prioritizes it over any other records that are due.

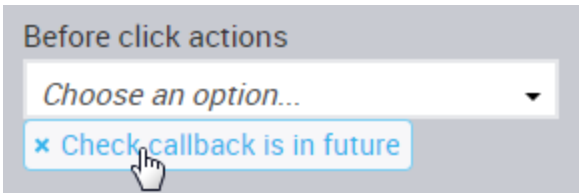
If you *did* manage to get passed a callback record, you may have noticed that when the record came back to you, the script was still where it left off – at the callback page.

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You probably don't want this. Instead, when an agent is passed a callback, you probably want the script to go back to the start. We can achieve this by clearing the fields that are set by the script.

OK, let's go back to our action. From the Data Entry Designer, you can get back into it by clicking the action name under **Before click actions**.



Back in the Action Builder, create some condition-true steps as follows:

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Step name	Step type	Assignment statement
Increase priority	Assign value	[INTERACTION_1.LKTL_CBPRIORITY] =1
Clear right-party contact	Assign value	[INTERACTION_1.CALL_TOUCH] ="
Clear OK to talk	Assign value	[INTERACTION_1.CALL_OK_TO_TALK] ="

The first step increases the priority of the record to 1, the highest priority. The next two steps clear the fields that are set when an agent goes through the script.



Note: The second and third steps end with two single inverted commas (' and '), not a single double inverted comma ("). These steps set the fields to an empty value.

6.8.5.8 Runtime

Once you've finished your changes, go back to the desktop and publish it again.

Now test this new stuff at runtime:

1. Have a look at the interaction history grid.
2. Try going through the script to the **Sale Made?** script box, and see how the **Sales promotion** tab automatically activates. Take a look at the iframe.
3. Try setting a callback for a time in the past. You'll see a message telling you that the callback must be in the future. The completion operation will be canceled.
4. Try setting a callback for a minute in the future. When the callback record comes in, you'll notice that the script starts at the start again.

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That's us now reached the end of this tutorial. In the last chapter, we'll consider where you should go from here.

6.8.6 Desktop Design Tutorial

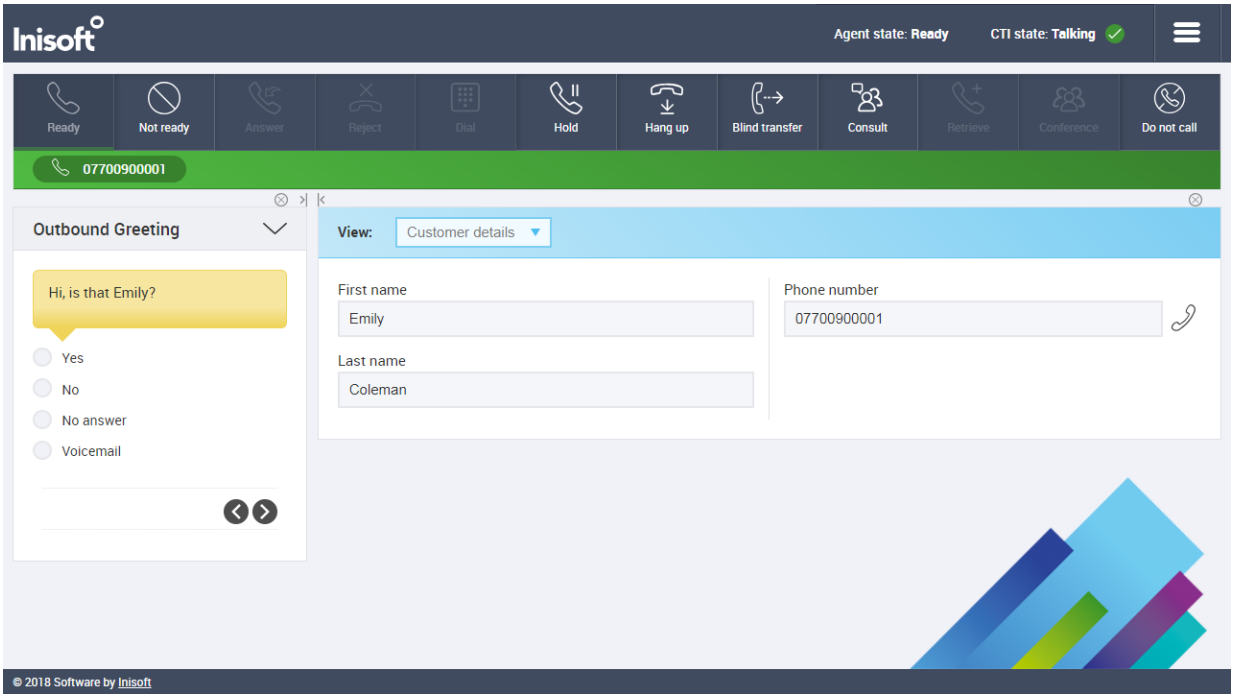
This tutorial is designed for people completely new to Syntelate XA and who are looking to learn how to design and use agent desktops.

This tutorial was designed to be used with a Syntelate XA environment that has been specially set up to support this tutorial. Among other things, this environment should include a universe called **Agent Desktop** and also be set up with dummy outbound records.

> **Note:** If you do not have access to such an environment, you can still read through this tutorial to learn the basics of Syntelate XA. Be aware, however, that you may not be able to follow some steps exactly.

By going through this tutorial, you'll pick up the basics of Syntelate XA and create a very simple agent desktop that looks like this:

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Before you go any further, you'll need a few things:

- The URL for a Designer environment that you can use with this tutorial
- The URL for the corresponding runtime environment
- Login details

You may not know what a "Designer environment" or a "runtime environment" is yet, but that's OK: we'll cover that in the tutorial!

Without any further ado, let's get started by creating a desktop.

6.8.7 Testing Your Desktop

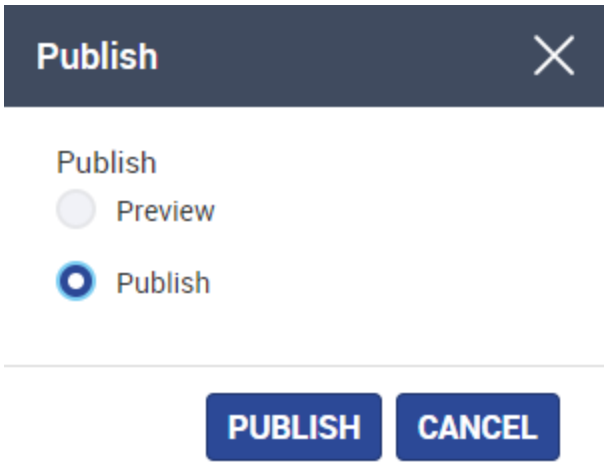
All right, so you've created a really simple desktop with a single data entry element. Now it's time to publish your desktop and test it out!

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6.8.7.1 Publishing Your Desktop

Open your desktop again in the Desktop Designer. (From the list of desktops, click  .)

Next, click  . You'll be asked whether you want to preview or publish your desktop. Select **Publish**, and then click **PUBLISH**.



6.8.7.2 Viewing Your Desktop

Now it's time to view your desktop as your agents will see it. So far we've been working in the Designer. When your agents use your desktop, that's called **runtime**.

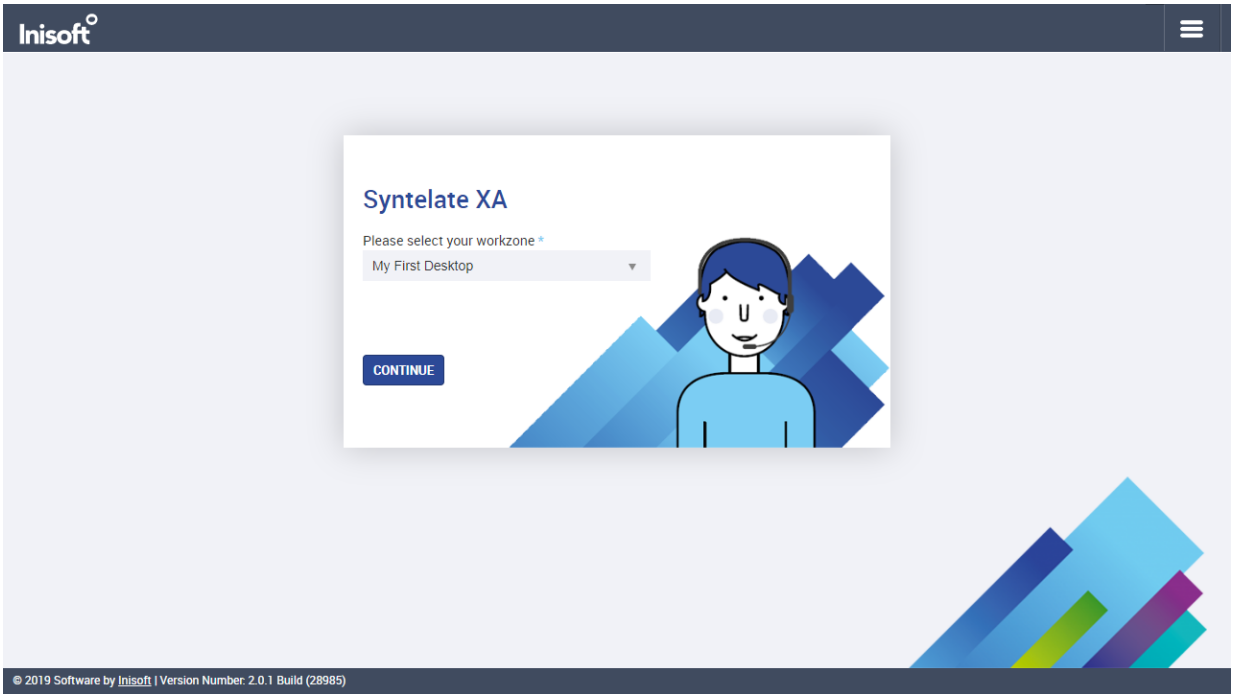
In another tab or window of your browser, visit the URL for runtime.

6.8.7.3 Selecting Your Workzone

You'll be prompted to select a workzone.

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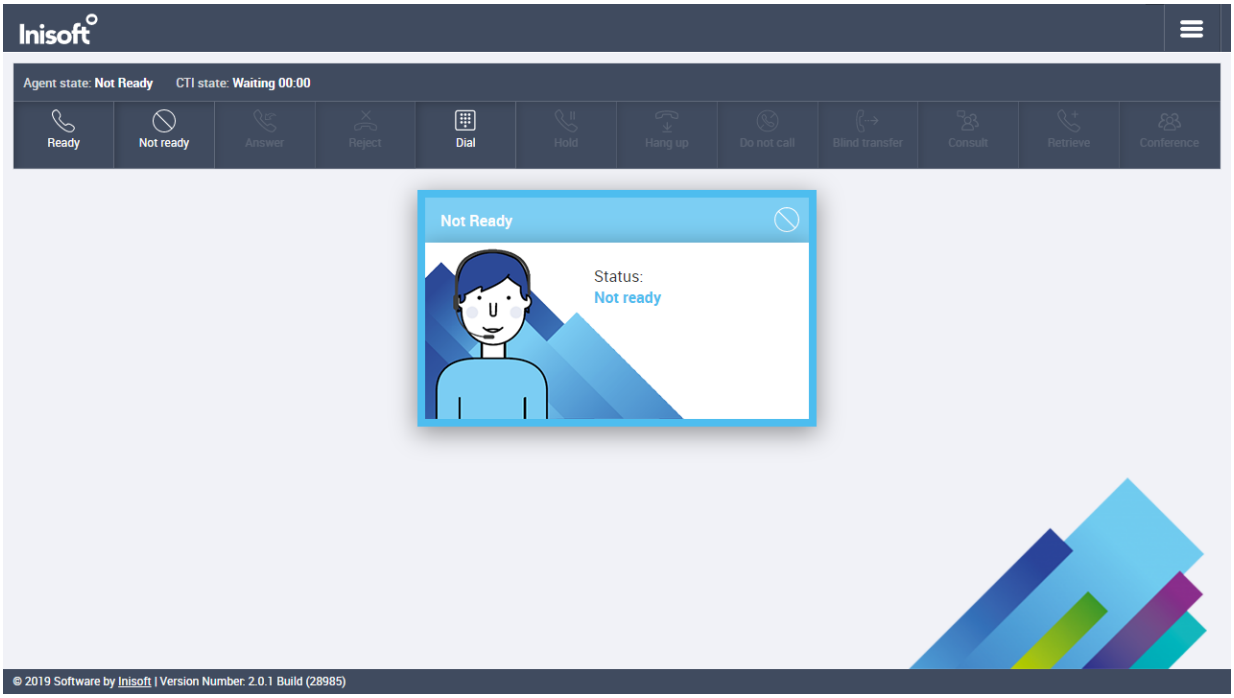
Select the workzone that has the same name as your desktop, and then click **CONTINUE**.



6.8.7.4 Going Ready

Once you've logged in to your workzone, you'll see the telephony toolbar and a not ready box. It's via the telephony toolbar that agents perform operations such as **answering** inbound calls and **hanging up** calls.

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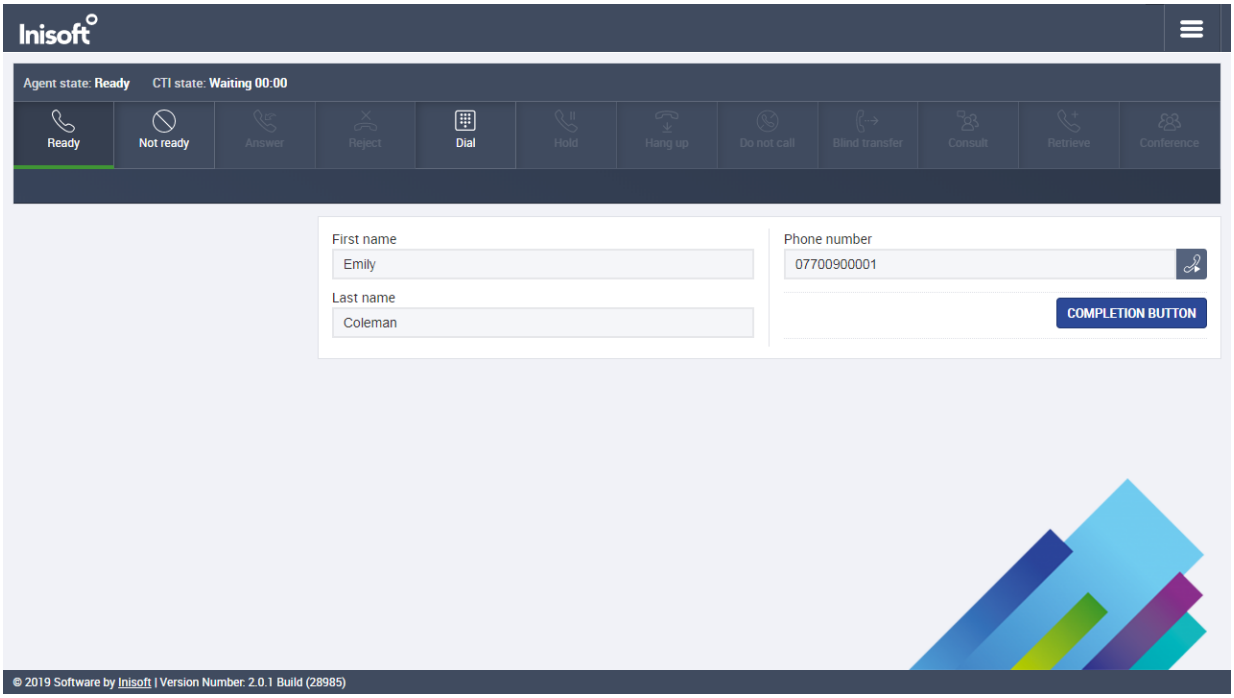


We set up your workzone to use the test telephony system. As such, you won't actually be able to make real calls to a number, but you can mimic dialing any number to get a feel for how Syntelate XA works.

As well as performing telephony operations, agents use the telephony toolbar to indicate their readiness to receive work.

For now, click **Ready** in the telephony toolbar. You'll be passed a dummy outbound call to make – and this will appear in the agent desktop that you've just created. Exciting!

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Note: If you're following this tutorial on an environment that has *not* been specially set up to support your learning, you probably won't be passed an outbound record at this point.

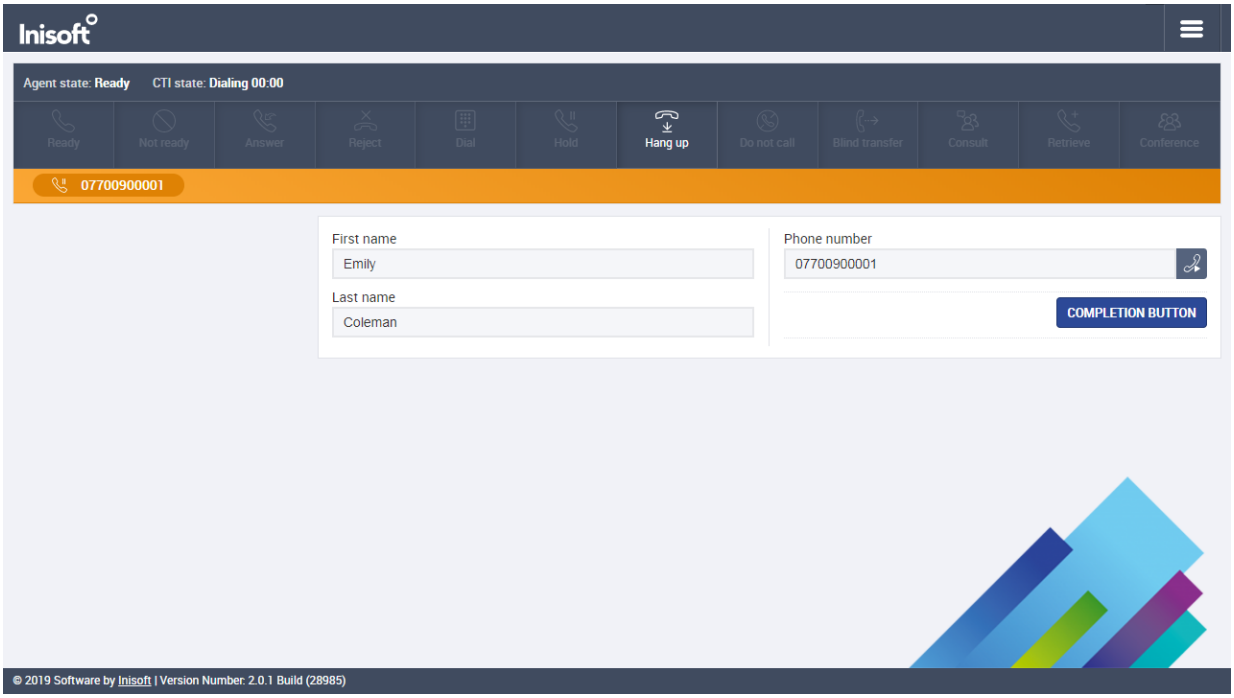
Instead click **New record** in the menu to manually create a new record. You'll then have to manually populate the three fields.

6.8.7.5 Making the Call

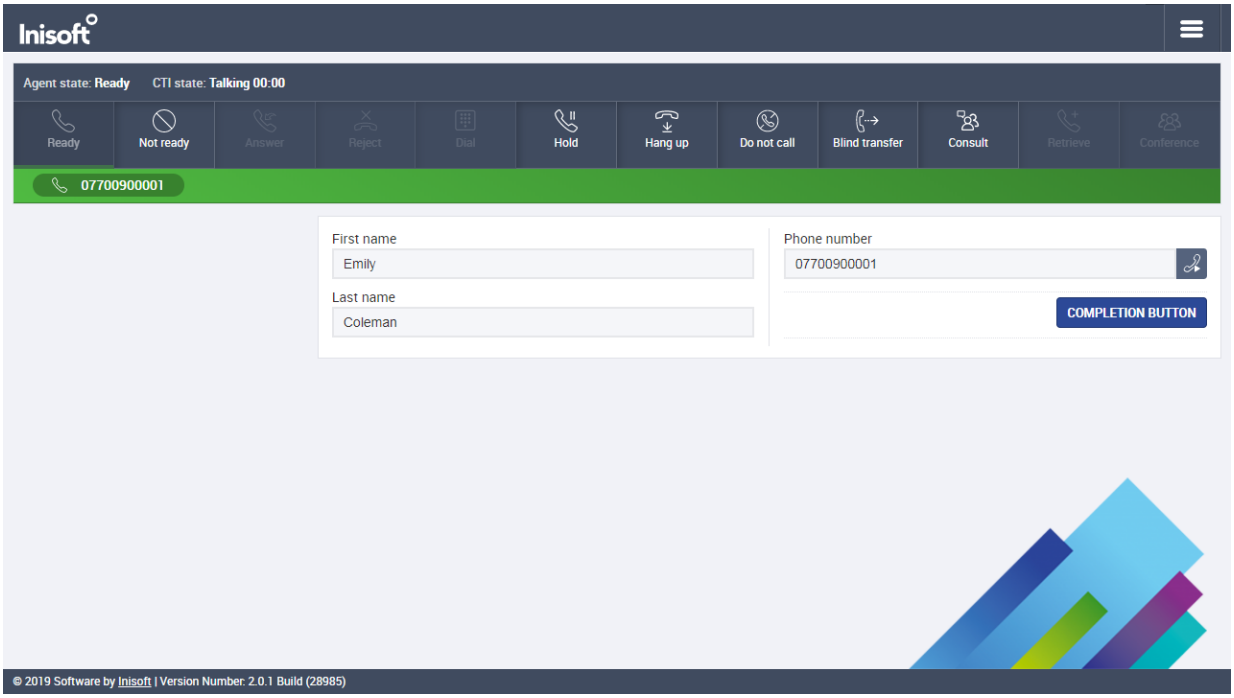
Click  beside the **Phone number** field to make the call.

The bar at the bottom of the telephony toolbar turns orange to mimic dialing.

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After 8 seconds the bar turns green, mimicking the customer having answered.

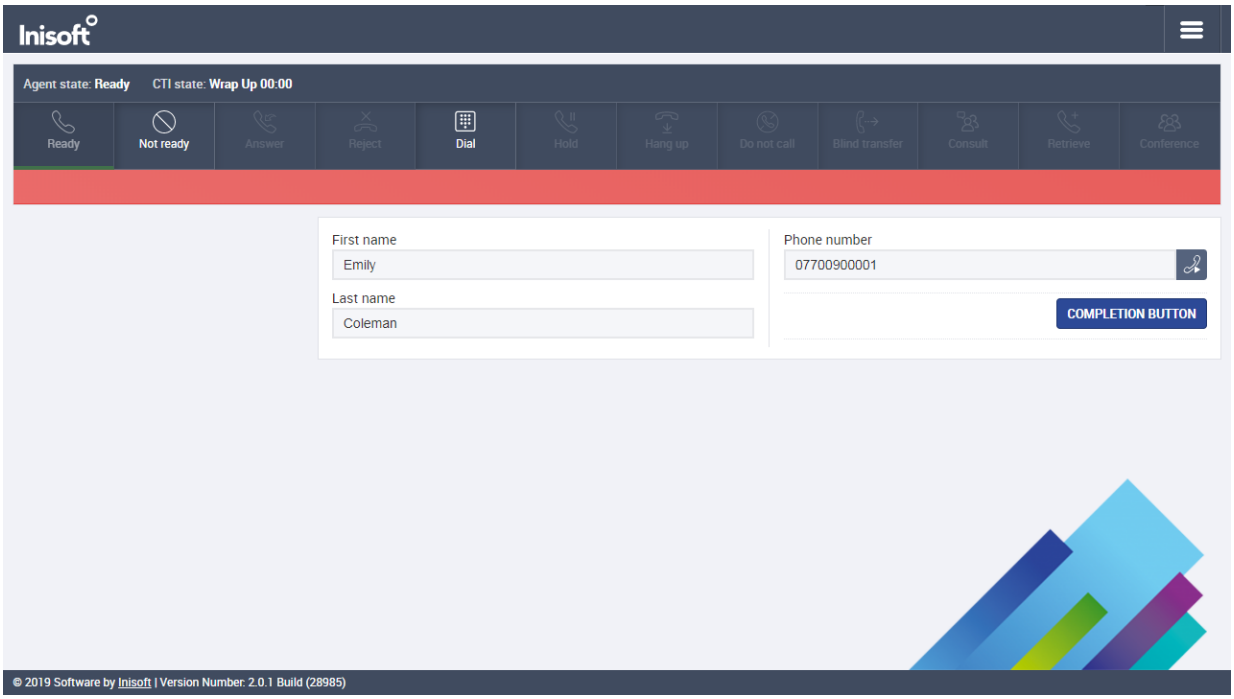


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6.8.7.6 Completing the Call

Click the **Hang up** button in the telephony toolbar to hang up the customer.

When you do this, the telephony bar will turn red and you'll move into wrap-up. In this state, the agent can continue to update the customer's record before clicking the completion button to close the record.



Once you close the record, you'll be passed another outbound call to make. This time, rather than hanging up, click the completion button straightaway. This disconnects the customer *and* closes the customer's record, all in one go.

You can go through more records if you like, but with our rather simplistic desktop, there's not much else to see yet. We'll soon change that!

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> **Note:** If you're following this tutorial on an environment that has *not* been specially set up to support your learning, you'll have to click **New record** whenever you want a new record.

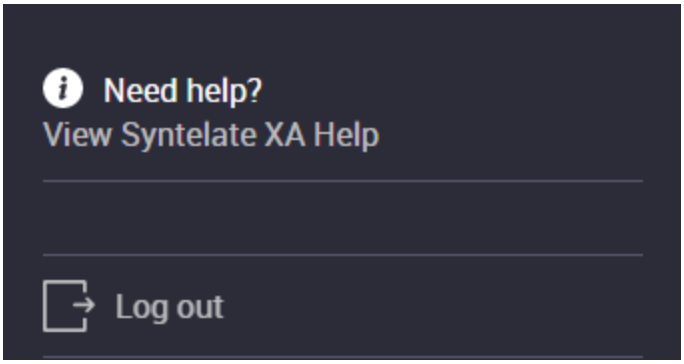
6.8.7.7 Going Not Ready

In the telephony toolbar, click **Not ready**. This tells Syntelate XA not to pass you any further records after you complete your current record.

Next, click the completion button to close your current record.

6.8.7.8 Logging Out

Click  to open the side menu:



Next, click **Log out**.

Now it's time to go back to the Designer and make our desktop a little more interesting! In the next chapter, we'll look at designing a script.

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6.8.8 Updating Your Workzone

All right, before you can test the simple desktop that you've created, we need to make some small changes to the configuration of your workzone.

6.8.8.1 What's a Workzone?

We encountered workzones once before, briefly, but we didn't explain them then, so let's talk about them now.

Think of a **workzone** as an area of your contact center business that agents can log in to. A travel company, say, might have two workzones: Personal Travel and Business Travel.

Some agents may only be trained in *either* personal travel *or* business travel. These agents would automatically be logged in to the appropriate workzone upon logging in to Syntelate XA.

Other agents may be trained in *both* personal travel *and* business travel. Such agents would be prompted to select a workzone upon logging in to Syntelate XA.

Often, as in our case, there's a one-to-one relationship between a workzone and a desktop. It *is* possible, though, to associate multiple workzones with the same desktop – but that's beyond the scope of this tutorial.

Also, it's at the level of the workzone that you configure such things as which CTI (Computer Telephony Integration) solution to use and whether the Worklist Engine should be used to pass records to agents. We'll configure these things now.

6.8.8.2 Updating the Workzone's Details

From the list of desktops, click 

and then click **Workzone Editor**.

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Click  for the workzone whose name matches the desktop that you created.

Next, follow these steps:

1. Change **CTI** to **Test telephony**.
2. For **CTI configuration (JSON)**, copy and paste the following:
   `{"AutoAnswerSeconds": "8","DefaultFromNumber": "+4400000000000"}`
3. For **Worklist enabled?**, select **Yes**.
4. Click 

.

What we're doing here is:

- Setting up the test telephony system, so that you can mimic making real calls.
- Activating the Worklist Engine for this workzone. The Worklist Engine is responsible for passing most types of interaction to agents (in our case, these interactions will be outbound calls for the agent to make).

Next let's look at testing your desktop.

6.8.9 What Next?

This has really just been the beginning of your journey with Syntelate XA. You've been introduced to the core concepts around agent desktop creation, and you should now have the confidence to explore Syntelate XA further yourself. Why not expand the basic desktop that you've just created with some new controls? There are a whole bunch of controls that you've not tried out yet.

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You could also try exploring some of the properties that you've not used yet. For example, why not add a text box to the **Customer Details** data entry element with the **Required?** property set. This will prevent the agent from closing a record unless this text box has been populated – a simple form of validation that doesn't require actions.

Also, although you added a ready-made grid to your desktop, you didn't actually go into the Grid Designer itself, so you may like to take some time to explore that. Grids are really powerful. As well as creating grids that display information, you can create editable grids that let agents update fields and add new records.

Good luck! And remember, as you continue to explore Syntelate XA, if ever there's something you're not sure about, just look it up in the documentation.

6.9 Grid Designer

Use the **Grid Designer** to design grids for Syntelate XA.

6.9.1 What's a Grid?

A **grid** is a table linked to a data source object in your universe. Grids can display data from this data source object. You can also let agents use grids to add, update, and delete records in the data source object.

The following read-only grid shows the customer's interaction history. This shows all previous contact with the customer across all channels, with a row for each previous interaction.

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Interaction history

	Date	Agent	Disposition
	11/04/2018 15:20	Jack	Callback
	10/04/2018 14:53	Jack	Callback
	09/04/2018 14:26	Jack	Issue Resolved
	05/04/2018 14:32	Caitlin B	Customer left the chat

The following editable grid is from a configuration desktop that is only accessible to users such as supervisors and managers. It is used to manage agents and has one row for each agent.

Agents

Username	Name of Agent	Display Name	+
bob.neville	Bob Neville	Bob	
christy.johnson	Christy Johnson	Christy	
jack.archer	Jack Archer	Jack	
kylie.dunbar	Kylie Dunbar	Kylie	
jamie.brown	Jamie Brown	Jamie	
jenny.smith	Jenny Smith	Jenny	
johnny.green	Johnny Green	Johnny	
joanne.irvine	Joanne Irvine	Joanne	
joey.cameron	Joey Cameron	Joey	
katie.milne	Katie Milne	Katie	

6.9.2 Designer Tiles

Creating a grid involves three Designer tiles:

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- **Universe Builder:** Use to add the data source object to the universe. The data source object must be of type **Grid table** or **Grid stored procedure**. Where a table, it must be a child of another table. More on this below.
- **Grid Designer:** Use to indicate:
  - The columns of the data source object that you wish to use in the grid
  - Whether each column is visible, read-only, and so on
- **Data Entry Designer:** Use to add the grid that you have created to a data entry element.

6.9.3 Child Table

Where a grid's data source object is a table, it must be a child table of another data source object.

EXAMPLE

On the Inisoft Travel agent desktop, a read-only grid shows all holidays that the customer has booked through Inisoft Travel:

Booking history

Destination	Departed	Returned	Adults	Children
Aspen, Colorado	07/01/2017	08/01/2017	2	0
Orlando, Florida	06/08/2016	20/08/2016	2	0

This grid's data source object is Inisoft Travel's HOLIDAYBOOKING table, which contains one record for every holiday that is booked through Inisoft Travel.

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HOLIDAYBOOKING is a child of Inisoft Travel's CONTACT table, which contains one record for every Inisoft Travel customer. The two tables are linked via the contact ID.

The parent-child relationship between these two data source objects means that, when a customer's record is opened in Syntelate XA (setting the contact ID), the grid shows all records in HOLIDAYBOOKING that relate to that customer.

6.9.4 Controls Linked to a Grid

Once you have added a grid to a data entry element, you can then add other data entry controls that reference the grid, for example:



Here fields **Hotel**, **Number of rooms**, **Airline**, and **Total price** all reference fields in the data source object used by the grid. When an agent clicks a row in the grid, these fields update to show the values for this row.

Regardless of whether you wish a field to show in the grid control (the table), or whether you wish to use it in a separate data entry control, you *must add the field as a column in the Grid Designer*.

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With the above example, the following are all columns in the Grid Designer:

- Destination
- Departed
- Returned
- Adults
- Children
- Hotel (invisible)
- Number of rooms (invisible)
- Airline (invisible)
- Total price (invisible)

In the **Column Properties** of **Hotel**, **Number of rooms**, **Airline** and **Total price**, **Visible?** is set to **No**.

To reiterate, any fields of the data source object that you wish to use *must* be added as a column to the grid.

Note that the **Editable?** column property dictates whether the field is editable, not only if it is displayed in the grid control, but also if it is used in any other data entry control.

> **Note:** Another example of a control linked to a grid is a transcript control linked to a interaction history grid. For more information, see Interaction History on page 419.

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6.9.5 Searchable Grids

The Grid Designer lets you add one or more search fields to a grid.

For example, the screenshot below shows a grid whose data source object is the INTERACTION_X table. This has been set up with four search fields: **First name**, **Surname**, **Phone number**, and **Email address**.



At Inisoft Travel, a supervisor can use one or more of the search fields to search for a particular interaction and then edit its details, such as the priority, callback time, and so on.

6.9.6 Adding a Grid

There are two ways to add a new grid.

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6.9.6.1 From a Data Entry Element

The easiest way to add a new grid is from the data entry element in which you'll use the grid. To do this, follow these steps:

1. Drag a grid control onto the data entry element.
2. Open the control's properties (click  and then **Properties**).
3. Under the **Grid name** property, click  .
4. In the **Name** box, type a name for the grid.
5. In the **Data source object** dropdown, select a data source object to use for the grid. The grid will display data from this data source object, and (where the grid is editable) any changes that agents make will be written back to this data source object.

   > **Note:** This dropdown shows data source objects in your universe of type **Grid table** or **Grid stored procedure**.

6. Click **SAVE**.

When you create a grid this way, you aren't presented with all of the options that you're presented with when you create a grid from the Grid Designer. However, at any time while designing a grid in the Grid Designer, you can click  to view and edit these options.

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6.9.6.2 From the Grid Designer

You can also add a new grid directly from the Grid Designer. To do this, follow these steps:

1. In the list of grids, click 

. The **Add Grid** section is shown.
2. In the **Name** box, type a name for the grid.
3. In the **Universe** dropdown, select the universe to which this grid should be added.
4. In the **Data source object** dropdown, select a data source object in this universe to use for the grid.

   > **Note:** If you select a data source object of type **Grid stored procedure**, the following fields will be hidden:
   >
   > - Allow editing of rows?
   > - Allow deletion of rows?
   > - Allow addition of rows?

5. Adjust the **Table Properties** as required.
6. Click 

.

6.9.7 Column Properties

This section describes the properties that you can set on a grid column.

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Property	Description
Field name	The field in the data source object from which / to which the column's cells should be read/written. You don't *need* to associate a column with a field in the data source object. For example, you wouldn't want to do this for an action button column. Similarly, for a calculation column, you *may* want to store the result of the calculation to the data source object – but equally, you may want to display it to the agent but not store it. **Note:** Be sure to select an appropriate field for the column type. For example, a column with a column type of **Date time** must be mapped to a datetime field in your data source object.
Sequence number	Defines the order in which columns appear in the grid. You can use any numbers; the lowest number will be the first column in the grid and the highest number will be the last column.
Column title	The title of the column.
Column type	The data type for cells in this column. You can select the following column types: » **Action button:** Shows an action button in the cell, which the agent can click to perform one or more actions. The text shown on the action button is the column title. » **Calculation:** Shows the result of a calculation in the cell. » **Check box:** Shows a check box in the cell, which the agent can

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Property	Description
	• select or clear. Writes 0 or 1 to the database. • **Date:** Shows a date picker when the agent clicks the cell. The agent can also manually type a date. Note that if the agent types an invalid date, the field will default to today's date. • **Date time:** Shows a date and time picker when the agent clicks the cell. The agent can also manually type a date and time. Note that if the agent types an invalid date, the field will default to today's date at 00:00. • **Image:** Shows an image in the cell. • **Money:** Lets the agent enter an amount of money in the cell. This is prefixed with a currency symbol, such as £ or $ (as defined in the **Config** property). • **Number:** Lets the agent enter a number (only) in the cell, including decimals. Note that, upon saving to the data source object, numbers are truncated rather than rounded if they do not match the field's format. For example, 4.9 would be saved as 4 (not 5) to a field that does not allow decimals. • **Dropdown:** Shows a dropdown in the cell. • **Text box:** Lets the agent enter text (a string) in the cell. • **Multiline text box:** Lets the agent enter text in a multiline cell. **Note:** If you don't select a column type, it defaults to text.

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Property	Description
Config	Shows for the following column types: » **Action button:** Select the actions to perform when the agent clicks the action button. » **Calculation:** Using the Calculation Builder, write a calculation expression. » **Image:** Using the Calculation Builder, write an expression to define the URL source of the image. If the URL will always be the same, then the expression should just be the URL (between ' and '), for example 'https://www.example.com/myimage.png'. » **Money:** Type a currency character (such as $ or £) to show before the field's value.
Width	Defines the width of the column in pixels. Because a grid always take up the full width of the data entry element container in which it is placed, Syntelate XA will automatically adjust the value that you enter if necessary.
Default value	Defines a default value for cells in this column, when the agent inserts a new row.
Sort grid by this column?	Sorts the grid by this column when the grid first loads. Once loaded, the agent can choose to sort the grid by any other column for which the **Sortable?** property has been set.
Sort	Where **Sort grid by this column?** has been set, defines whether the grid

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Property	Description
ascending?	should initially be sorted in ascending order. Click **No** to sort in descending order.
Editable?	Defines whether the agent can edit the cells in this column when adding a new row or editing an existing row, or where attempting to edit a separate data entry control that points to the grid field (see Controls Linked to a Grid on page 429).
Sortable?	Set to **No** to prevent the agent from sorting by this column.
Visible?	Set to **No** to hide this column so that the agent cannot see it. You would want to do this if, for example, you intend to display the field, not in a grid control, but in another data entry control (see Controls Linked to a Grid on page 429).
Required?	Set to **Yes** to prevent the agent from saving a new row or saving edits to an existing row when the cell in this column is blank.

6.9.8 Designing a Grid

To start designing a grid, click  in the list of grids.

6.9.8.1 Editing a Grid's Details

To edit a grid's details, click 

to show the **Table Details** section.

Edit the grid's details as required, and then click 

.

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6.9.8.2 Inserting a Column

To insert a new column into a grid, follow these steps:

1. Click 

. If this will be the grid's first column, it is inserted straightaway. Otherwise, the **Insert Column** dialog box appears.
2. In the **Insert Column** dialog box:
    a. Use the **Position** and **Column** dropdowns to select an existing column to insert the new column before or after.
    b. Click **OK**.

6.9.8.3 Editing a Column's Properties

To edit a column's properties, follow these steps:

1. Click  and then **Edit**. The **Column Properties** section shows.
2. Edit the column's properties as required. For a description of each property, see Column Properties on page 413.
3. Click 

.

6.9.8.4 Reordering Columns

To reorder columns, edit the **Sequence number** property of the columns that you want to move.

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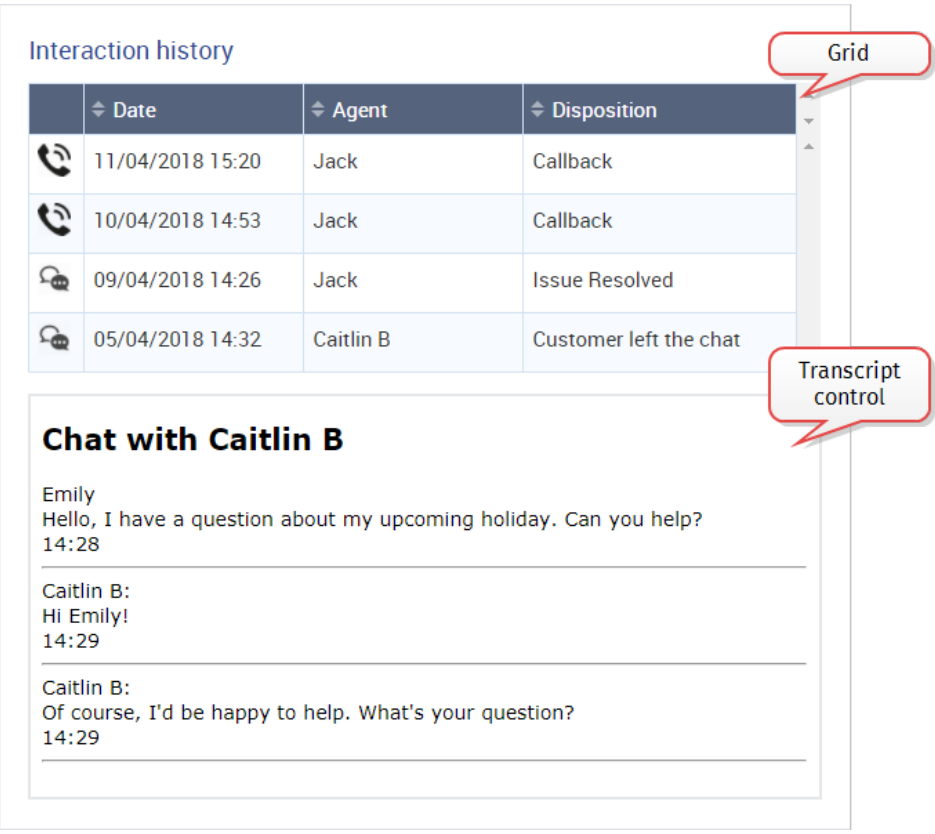
6.9.8.5 Deleting a Column

To delete a column, click and then **Delete**. The **Delete Column** dialog box appears.

Click **OK** to confirm the deletion.

6.9.9 Interaction History

A common use of a grid is to show agents past interactions with the current customer, across channels. Typically this is done in conjunction with a transcript.



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Here's how you'd go about setting up the interaction history grid and transcript control, as well as the invisible message history grid, in the above screenshot.

6.9.9.1 Create the Interaction History Grid

Create a new grid called **Interaction history** that uses the INTERACTION_X_HISTORY view as its data source object.

This grid should be read-only (i.e. in the **Grid Properties**, set **Allow editing of rows?**, **Allow deletion of rows?**, and **Allow addition of rows?** to **No**).

Insert the Image Column

The first column in the grid shows an icon representing the type of interaction (voice call, web chat, Facebook chat, and so on).

To create this, insert a column with details as so:

Property	Value
Sequence number	5
Column type	Image
Config	See below. **Note:** If your universe's INTERACTION_X table is called, say, INTERACTION_2, then replace the references to INTERACTION_1_HISTORY with references to INTERACTION_2_HISTORY.

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Property	Value
Width	20

Config: ([INTERACTION_1_HISTORY.LKTL_WLMTYPE]=='CHAT')?(([INTERACTION_1_HISTORY.LKTL_CHATTYPE]=='TWITTER')?((([INTERACTION_1_HISTORY.LKTL_ISPRIVATE]=='Y')?'../images/twitterIconPrivate.png':'../images/twitterIcon.png')):(([INTERACTION_1_HISTORY.LKTL_CHATTYPE]=='FACEBOOK')?((([INTERACTION_1_HISTORY.LKTL_ISPRIVATE]=='Y')?'../images/facebookMessengerIcon.png':'../images/facebookIcon.png')):'../images/webchatIcon.png')):(([INTERACTION_1_HISTORY.LKTL_WLMTYPE]=='EMAIL')?'../images/email.png':'../images/call.png')

Insert the Date Column

The second column in the grid shows the date and time of the interaction.

To create this, insert a column with details as so:

Property	Value
Field name	LKTL_LASTSAVED
Sequence number	10
Column title	Date
Column type	Date time
Width	80

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Property	Value
Sort grid by this column?	Yes
Sort ascending?	No

Insert the Agent Column

The third column in the grid shows the name of the agent who handled the interaction.

To create this, insert a column with details as so:

Property	Value
Field name	LKTL_AGENTNAME
Sequence number	15
Column title	Agent
Column type	Text box
Width	80

Insert the Disposition Column

The last column in the grid shows the description of the completion code or chat disposition code that was used to end the interaction.

To create this, insert a column with details as so:

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Property	Value
Field name	DISPOSITION
Sequence number	20
Column title	Disposition
Column type	Text box
Width	100

6.9.9.2 Create the Message History Grid

Create a new grid called **Message history** that uses the INTERACTION_X_MESSAGE_HISTORY view as its data source object.

This grid should be read-only. You must set **Auto-select first row?** to **Yes**.

This grid won't show at runtime. We'll set it to invisible later, when adding it to a data entry control.

Insert the Date Column

Insert a column with details as so:

Property	Value
Field name	LKTL_TIME
Sequence number	1

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Property	Value
Column title	Date
Column type	Date time
Width	100
Sort grid by this column?	Yes

Insert the Subject Column

Insert a column with details as so:

Property	Value
Field name	LKTL_SUBJECT
Sequence number	2
Column title	Subject
Column type	Text box
Width	200

Insert the Message Column

Insert a column with details as so:

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Property	Value
Field name	LKTL_MESSAGE
Sequence number	4
Column title	Message
Column type	Text box
Width	0

6.9.9.3 Add the Grids and Transcript to a Data Entry Element

Last, add two grid controls and a transcript control to a data entry element.

Set the first grid control to show the interaction history grid.

Set the second grid control to show the message history grid. For **Invisible?**, select **Yes**.

Set the **Table name** property of the transcript control to the INTERACTION_X_MESSAGE_HISTORY view.

6.9.10 Grid Designer

Use the **Grid Designer** to design grids for Syntelate XA.

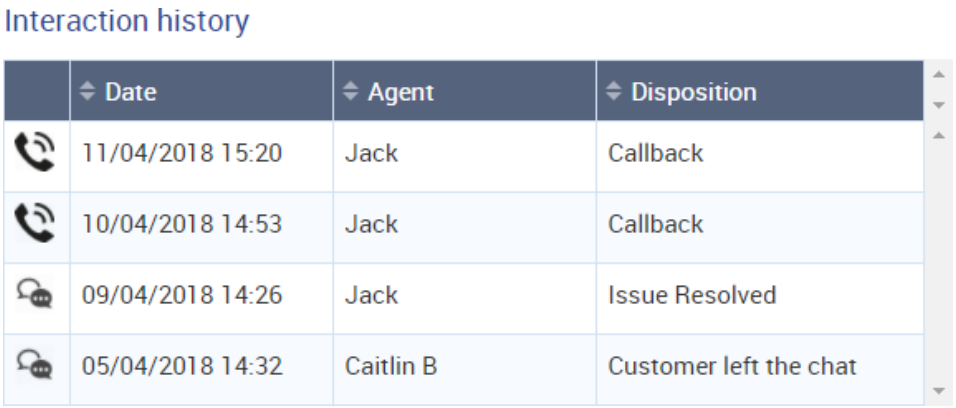
6.9.10.1 What's a Grid?

A **grid** is a table linked to a data source object in your universe. Grids can display data from this data source object. You can also let agents use grids to add, update, and delete

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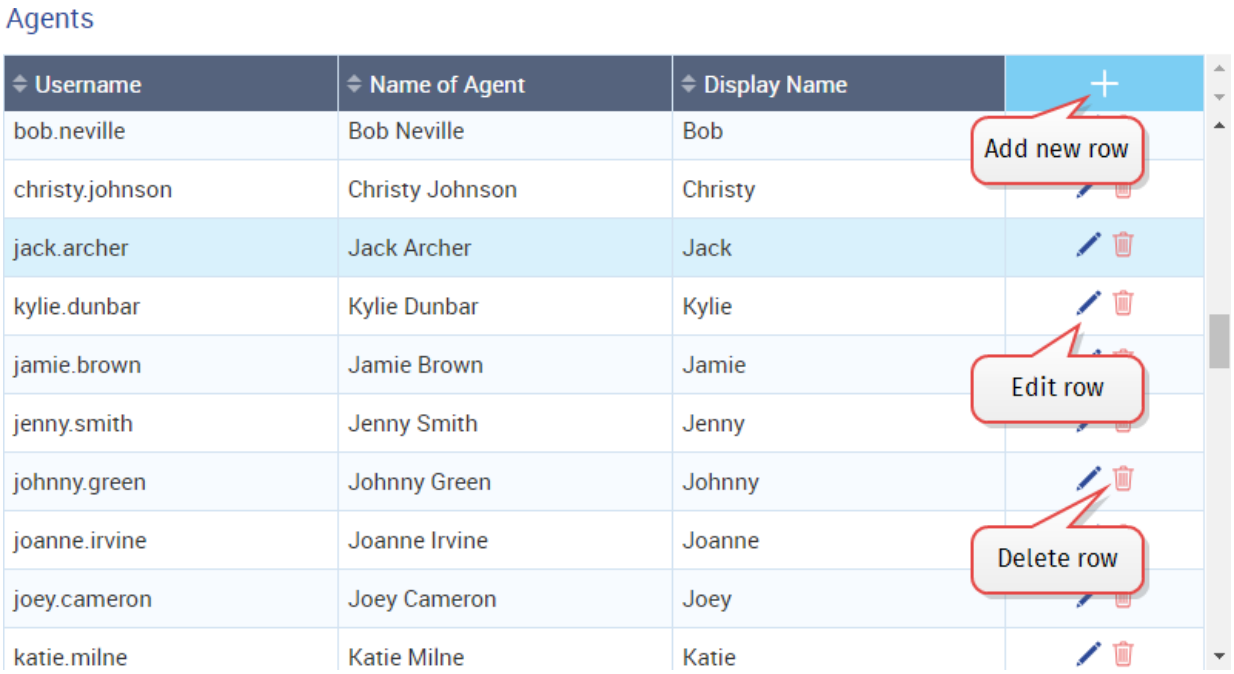
records in the data source object.

The following read-only grid shows the customer's interaction history. This shows all previous contact with the customer across all channels, with a row for each previous interaction.



The following editable grid is from a configuration desktop that is only accessible to users such as supervisors and managers. It is used to manage agents and has one row for each agent.

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6.9.10.2 Designer Tiles

Creating a grid involves three Designer tiles:

- **Universe Builder:** Use to add the data source object to the universe. The data source object must be of type **Grid table** or **Grid stored procedure**. Where a table, it must be a child of another table. More on this below.
- **Grid Designer:** Use to indicate:
  - The columns of the data source object that you wish to use in the grid
  - Whether each column is visible, read-only, and so on
- **Data Entry Designer:** Use to add the grid that you have created to a data entry element.

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6.9.10.3 Child Table

Where a grid's data source object is a table, it must be a child table of another data source object.

EXAMPLE

On the Inisoft Travel agent desktop, a read-only grid shows all holidays that the customer has booked through Inisoft Travel:

Booking history

Destination	Departed	Returned	Adults	Children
Aspen, Colorado	07/01/2017	08/01/2017	2	0
Orlando, Florida	06/08/2016	20/08/2016	2	0

This grid's data source object is Inisoft Travel's HOLIDAYBOOKING table, which contains one record for every holiday that is booked through Inisoft Travel.

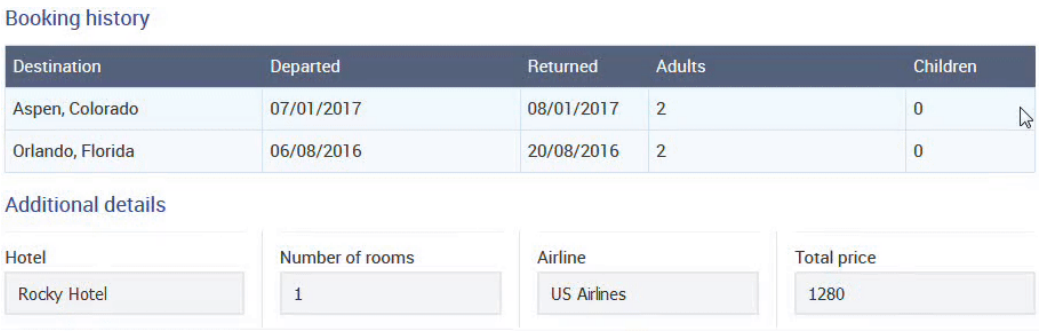
HOLIDAYBOOKING is a child of Inisoft Travel's CONTACT table, which contains one record for every Inisoft Travel customer. The two tables are linked via the contact ID.

The parent-child relationship between these two data source objects means that, when a customer's record is opened in Syntelate XA (setting the contact ID), the grid shows all records in HOLIDAYBOOKING that relate to that customer.

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6.9.10.4 Controls Linked to a Grid

Once you have added a grid to a data entry element, you can then add other data entry controls that reference the grid, for example:



Here fields **Hotel**, **Number of rooms**, **Airline**, and **Total price** all reference fields in the data source object used by the grid. When an agent clicks a row in the grid, these fields update to show the values for this row.

Regardless of whether you wish a field to show in the grid control (the table), or whether you wish to use it in a separate data entry control, you *must add the field as a column in the Grid Designer*.

With the above example, the following are all columns in the Grid Designer:

- Destination
- Departed
- Returned
- Adults
- Children

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- Hotel (invisible)
- Number of rooms (invisible)
- Airline (invisible)
- Total price (invisible)

In the **Column Properties** of **Hotel**, **Number of rooms**, **Airline** and **Total price**, **Visible?** is set to **No**.

To reiterate, any fields of the data source object that you wish to use *must* be added as a column to the grid.

Note that the **Editable?** column property dictates whether the field is editable, not only if it is displayed in the grid control, but also if it is used in any other data entry control.

> **Note:** Another example of a control linked to a grid is a transcript control linked to a interaction history grid. For more information, see Interaction History on page 419.

6.9.10.5 Searchable Grids

The Grid Designer lets you add one or more search fields to a grid.

For example, the screenshot below shows a grid whose data source object is the INTERACTION_X table. This has been set up with four search fields: **First name**, **Surname**, **Phone number**, and **Email address**.

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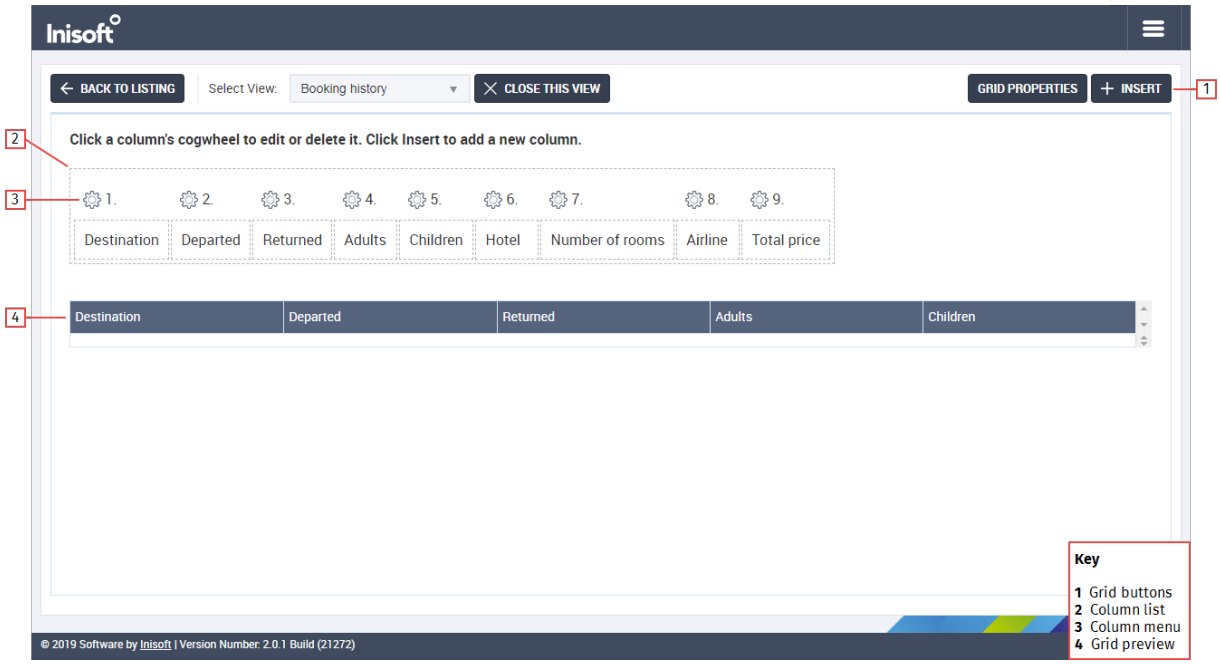


At Inisoft Travel, a supervisor can use one or more of the search fields to search for a particular interaction and then edit its details, such as the priority, callback time, and so on.

6.9.11 The Interface

The layout of the Grid Designer is as follows:

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6.9.11.1 Grid Buttons

The following buttons show at grid-level.

Button	Description
GRID PROPERTIES	Click to edit the grid's properties.
+ INSERT	Click to insert a new column into your grid.

Note: Unlike desktops, scripts, and data entry elements, you do not need to publish a grid. Changes that you make to a grid go live as soon as you close the grid view.

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6.9.11.2 Column List

The column list shows the titles of all the columns in the grid.

6.9.11.3 Column Menu

Click  for a column to show the column menu. The following options show in the column menu.

Option	Description
Edit	Click to edit the column's properties.
Delete	Click to delete the column.

6.9.11.4 Grid Preview

The grid preview shows a very rough preview of how the grid will look at runtime.

6.10 Query Builder

Use the **Query Builder** to create database views via a graphical interface.

Once you've created a database view, you can use it as the data source object for a grid or chart, for example.

To use the Query Builder, you must have a basic understanding of SQL concepts. The Query Builder will generate the actual SQL SELECT statement based on how you visually design your query.

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6.10.1 Active Query Builder

Syntelate XA uses an external component called the Active Query Builder to build SQL queries.

This help provides a quick guide to the interface of the Query Builder in Syntelate XA. A full user guide for the Active Query Builder is available at https://activequerybuilder.com/hs15.html.

> **Note:** The screenshots in the external user guide look different to how the Query Builder looks in Syntelate XA, but the concepts remain the same.

6.10.2 Query Builder

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6.10.2.1 Active Query Builder

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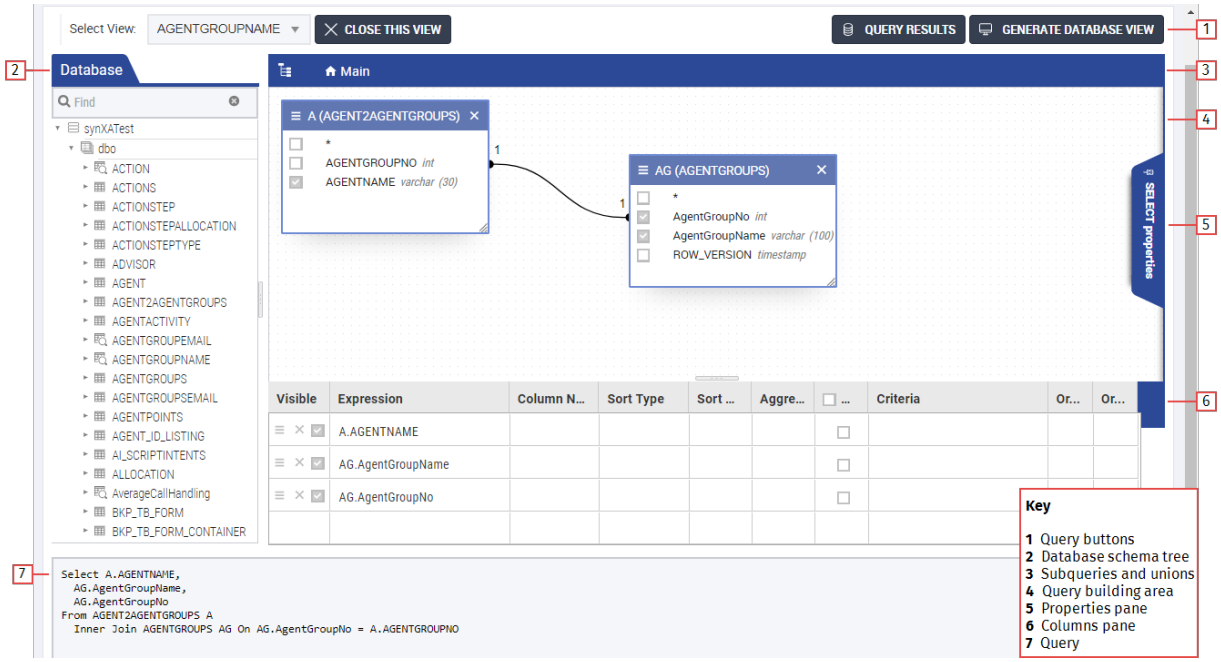
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This help provides a quick guide to the interface of the Query Builder in Syntelate XA. A full user guide for the Active Query Builder is available at https://activequerybuilder.com/hs15.html.

> **Note:** The screenshots in the external user guide look different to how the Query Builder looks in Syntelate XA, but the concepts remain the same.

6.10.3 The Interface

The layout of the Query Builder is as follows:



6.10.3.1 Query Buttons

The following buttons show at the top of the page.

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Button	Description
QUERY RESULTS	Click to show the results of your query.
GENERATE DATABASE VIEW	Click to create/update a database view using your query. All database views generated via Query Builder are named QB_xxx, where xxx is the name of the query.

6.10.3.2 Database Schema Tree

The Database Schema Tree shows all tables and views (and table-valued functions) in your database.

Icon	Description
	Table
	View
	Table-valued function

Double-click or drag a table/view to add it to the Query Building Area.

You can also double-click or drag an individual field. This adds the table/view to the Query Building Area with that field selected.

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6.10.3.3 Subqueries and Unions

Hover over the blue bar at the top of the Query Building Area to show a gray bar. The following buttons show across the blue and gray bars.

Button	Description
	Click to show a list of all queries. You can click a query in this list to navigate to it.
	Click to return to the main query (from a subquery). Subqueries, once added, appear as tabs to the right of this button. From the main query, you can click a tab to navigate to that subquery.
	Click to add a derived table.
	Click to add a new named subquery.
	Click to add a union. Unions, once added, appear to the left of this button. Click a union to navigate to it.



Tip: You can also add derived tables, named subqueries, and unions by right-clicking in the Query Building Area.

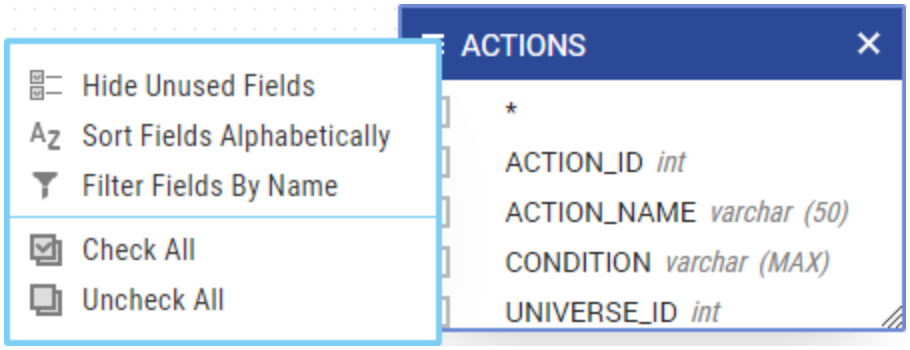
6.10.3.4 Query Building Area

The Query Building Area is the main area for visually building your query.

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Menus

For a particular table/view/subquery, right-click or click ☰ to show a menu, for example:

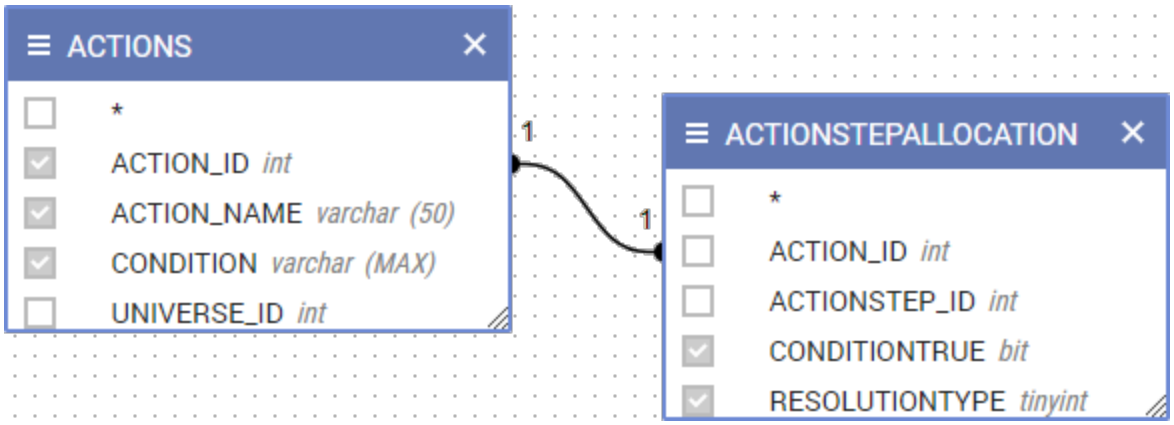


Selecting Fields

For a particular table/view, select fields to add them to your query.

Creating Joins

Drag a field from one table or view to a field of another table or view to create an inner join.



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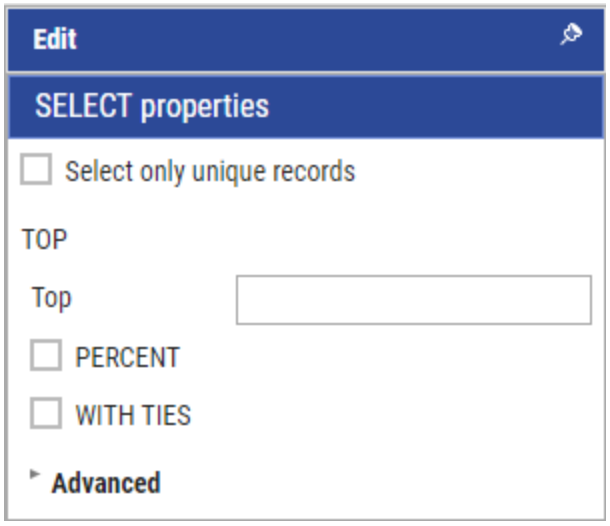
You can right-click a join to change it to a left, right, or full join or else to delete it.



Tip: You can also edit the properties of a join from the Properties pane.

6.10.3.5 Properties Pane

Click the properties button at the right of the Query Building Area to show the properties pane, for example:



The properties shown in this pane are sensitive to what has been selected in the Query Building Area. Click a table, view, subquery, or join to view its properties.

Without anything selected, the pane shows the “properties” of the SQL SELECT statement.

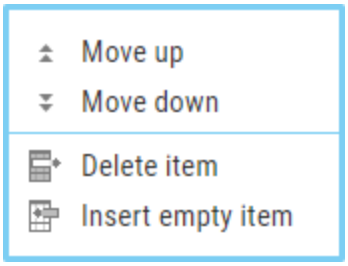
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6.10.3.6 Columns Pane

The Columns Pane shows fields that you have added to your query. Here you can define aliases, specify sort order, define grouping, and more.

Menu

Right-click a row to show a menu:



You can also move/delete items via the ☰ and ✕ buttons in the **Visible** column. With the ☰ button, simply drag the item where you want it to go.

Adding a New Field

When you select fields in the Query Building Area, they appear as items in the Columns Pane.

You can also add fields directly from the Columns Pane by using the empty row at the end. Click in the **Expression** box and then select a field via the dropdown.

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6.10.3.7 Query

The SQL SELECT statement is automatically built up as a result of things that you do in the visual builder.

You can, however, also manually edit the SQL. When you've finished making your changes, click  . This validates what you have typed and then updates the visual builder accordingly.

> **Note:** This validates the SQL syntax but doesn't check, for example, that the column names are valid. To check this, click 
>
> .

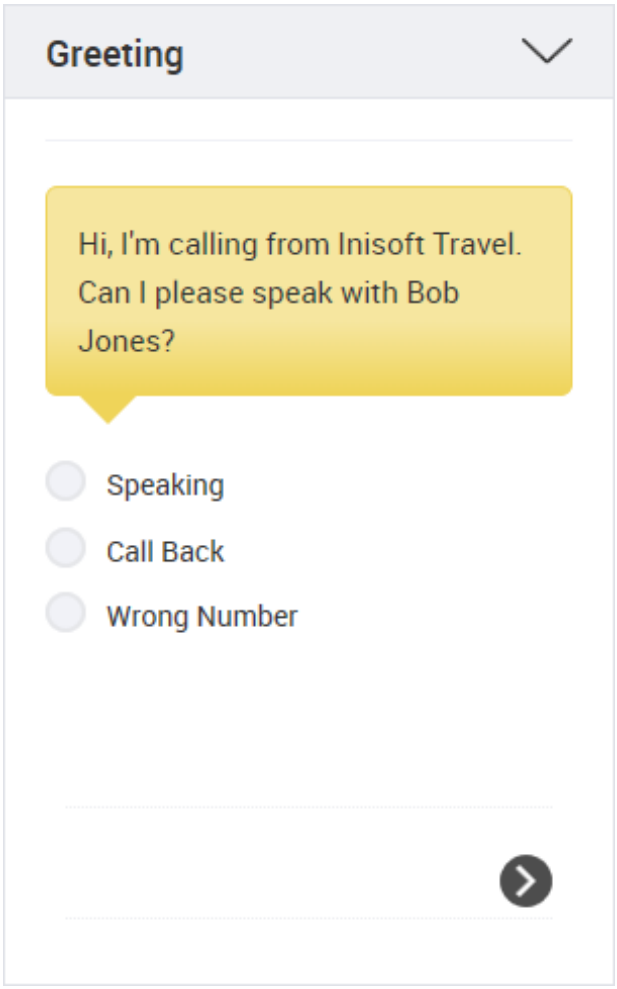
6.11 Script Designer

Use the **Script Designer** to design scripts for Syntelate XA.

6.11.1 What's a Script?

A **script** tells agents what to say and do during a call. It also defines the different paths that the call can go down. For example, a script might branch into two or more possible paths based on how the customer responds to a question.

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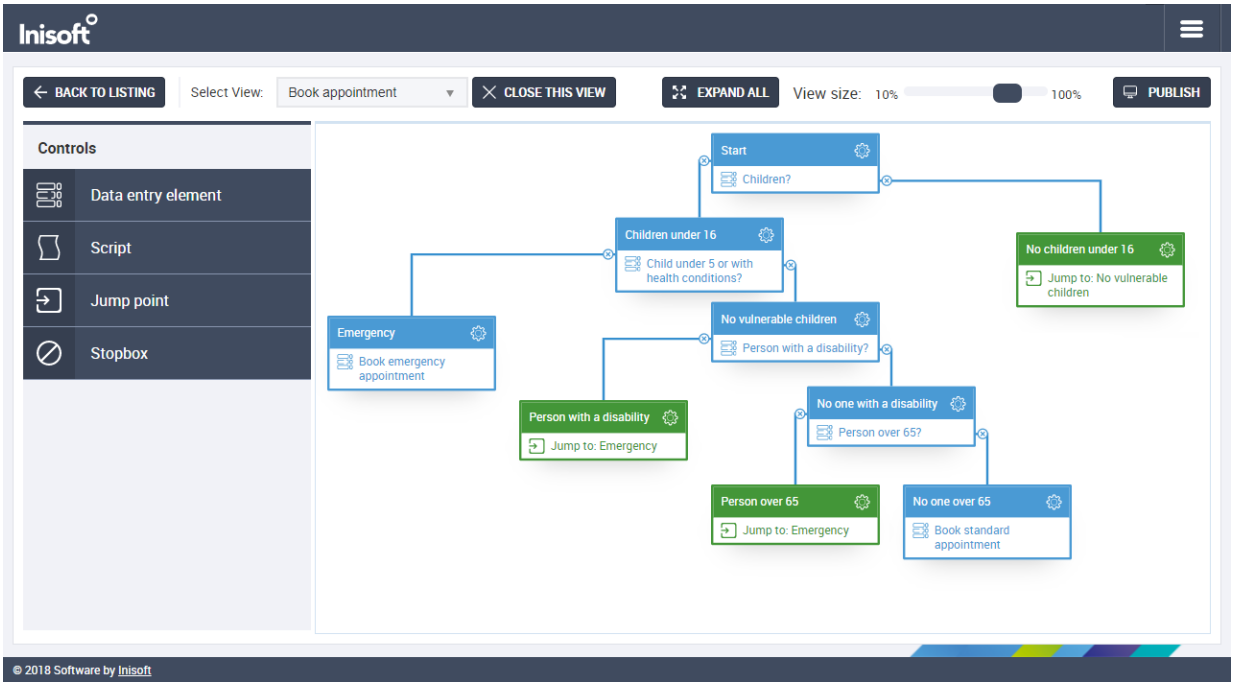


To progress in a script, an **exit condition** must be met, such as a radio button being clicked by the agent.

Once you've designed a script, add it to a desktop. A script itself is made up of one or (usually) more **script controls**. Data entry elements are the most common type of script control; you use data entry elements to instruct the agent what to do or say at each point in the call.

The following screenshot shows what a script looks like when it is being designed:

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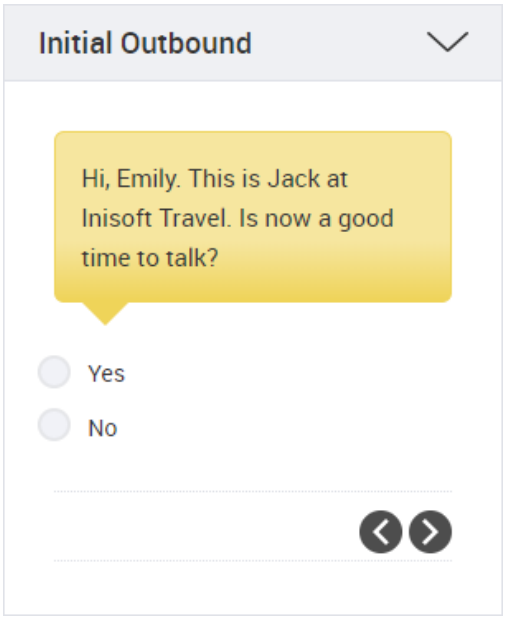


6.11.2 About Callbacks

In Syntelate XA, a callback to a customer uses the same interaction record in the INTERACTION_X table as the original interaction record. This has some implications for scripts.

Consider the following script page:

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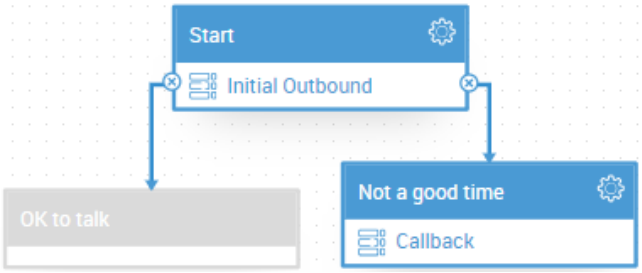
This is a data entry element called **Initial Outbound** with two controls: a text control and a radio buttons control.

The radio buttons control writes to field OK_TO_TALK, which Inisoft Travel added to their INTERACTION_1 table. The option **Yes** writes Y to this field, while the option **No** writes N to this field.

In the script, this data entry element is added as a control with two exit conditions:

Condition name	Condition
OK to talk	[INTERACTION_1.OK_TO_TALK] == 'Y'
Not a good time	[INTERACTION_1.OK_TO_TALK] == 'N'

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When an agent clicks **No** on this script page, they are taken to the **Callback** script page, where they can set a callback.

Here's the thing. Unless the OK_TO_TALK field is cleared, when Syntelate XA passes the callback to the agent, the script will open at the **Callback** script page (since OK_TO_TALK is still N in the interaction record).

For this reason, we recommend that you create an action that clears any relevant fields set by the script and then set this action to be performed when the agent clicks a completion button.

6.11.3 Adding a Script

There are two ways to add a new script.

6.11.3.1 From a Desktop

The easiest way to add a new script is from the desktop in which you'll use the script. To do this, follow these steps:

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1. Drag a script control onto the desktop.
2. Click  and then **Properties**.
3. Under the **Script name** property, click  .
4. In the **Name** box, type a name for the script.
5. Click **SAVE**.

The script is added to the same universe as the desktop.

6.11.3.2 From the Script Designer

You can also add a new script directly from the Script Designer. To do this, follow these steps:

1. In the list of scripts, click  . The **Add Script** section is shown.
2. In the **Name** box, type a name for the script.
3. In the **Universe** dropdown, select the universe to which this script should be added.
4. Click  .

6.11.4 Designing a Script

To start designing a script, click  in the list of scripts.

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6.11.4.1 Adding a Control

To add a control to a script, click and drag the control to an empty script box.

> **Note:** New empty script boxes are created when you define the exit conditions for a control (using the **Exit condition(s)** property). Each exit condition represents one branch that the script can take.

6.11.4.2 Editing a Control's Properties

To edit a control's properties, follow these steps:

1. Click and then **Properties**. The **Control properties** section shows.
2. Edit the control's properties as required. For a description of each property, see Script Controls on page 452.
3. Click SAVE.

6.11.4.3 Viewing a Data Entry Element / Subscript

You can open any data entry element or subscript that a script uses to view and/or edit it.

To do this, from the **Control properties** section, click VIEW.

6.11.4.4 Collapsing/Expanding a Branch

When you're working on a script, you may only be interested in a particular part of it. To hide a script branch that you're not interested in, click .

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For each control, Syntelate XA shows whether any script branches have been collapsed and, if so, how many: +2.

To expand a script branch again, click this. Where more than one script branch has been collapsed, Syntelate XA will ask which branch you'd like to expand.



To quickly expand all collapsed branches in a script, click EXPAND ALL.

6.11.4.5 Inserting/Replacing a Control

You can:

- Insert a new control before an existing control.
- Replace an existing control with a different type of control.

To do this, drag the new control onto the existing control. The **Insert/Replace Control** dialog box appears. Select whether you want to insert a new control or replace the existing control, and then click **CONFIRM**.

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Note: A jump point or stopbox can only replace an existing control. This will delete any controls below the existing control.

6.11.4.6 Deleting a Control

To delete a control, click and then **Delete**. A dialog box shows.

If the control has exit conditions, you'll have the option to:

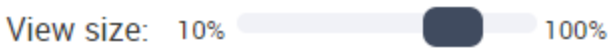
- Delete the control and everything below it.
- Delete the control but retain a particular branch.

If you retain a branch, this branch will move up in the script to take the place of the deleted control.

Note: You can also delete entire branches by deleting exit conditions in a control's properties.

6.11.4.7 Zooming

To zoom in or out of a script, use the size slider.



6.11.4.8 Publishing/Previewing

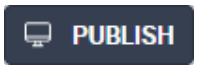
Any changes that you make to a script are not reflected at runtime until you publish the script.

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Perhaps you're not ready to publish the script for runtime but just want to preview how it'll look. Syntelate XA allows you to do this too.

> **Note:** To publish or preview a script, the script must be part of a desktop.
>
> Publishing a desktop automatically publishes any scripts (and data entry elements) that the desktop uses.

To publish or preview a script, follow these steps:

1. Click 

. The **Publish** dialog box appears.
2. Select whether to preview the script or to publish it.
3. If previewing the script, select the desktop that you'd like to preview.
4. Click **PUBLISH**.

If any controls are missing required properties, an error message is shown. Fix these controls, and then try to publish the script again.

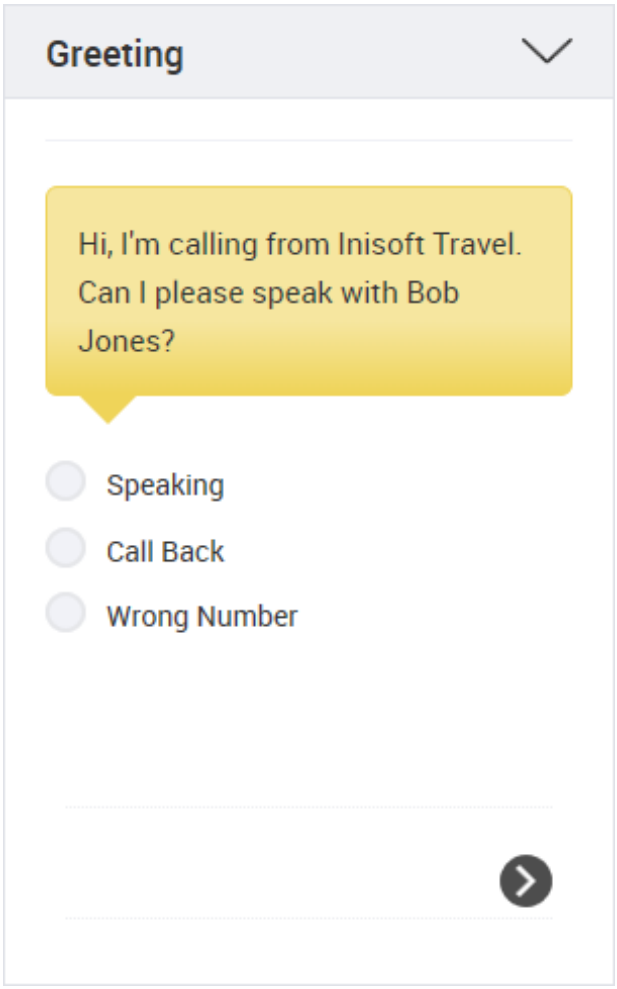
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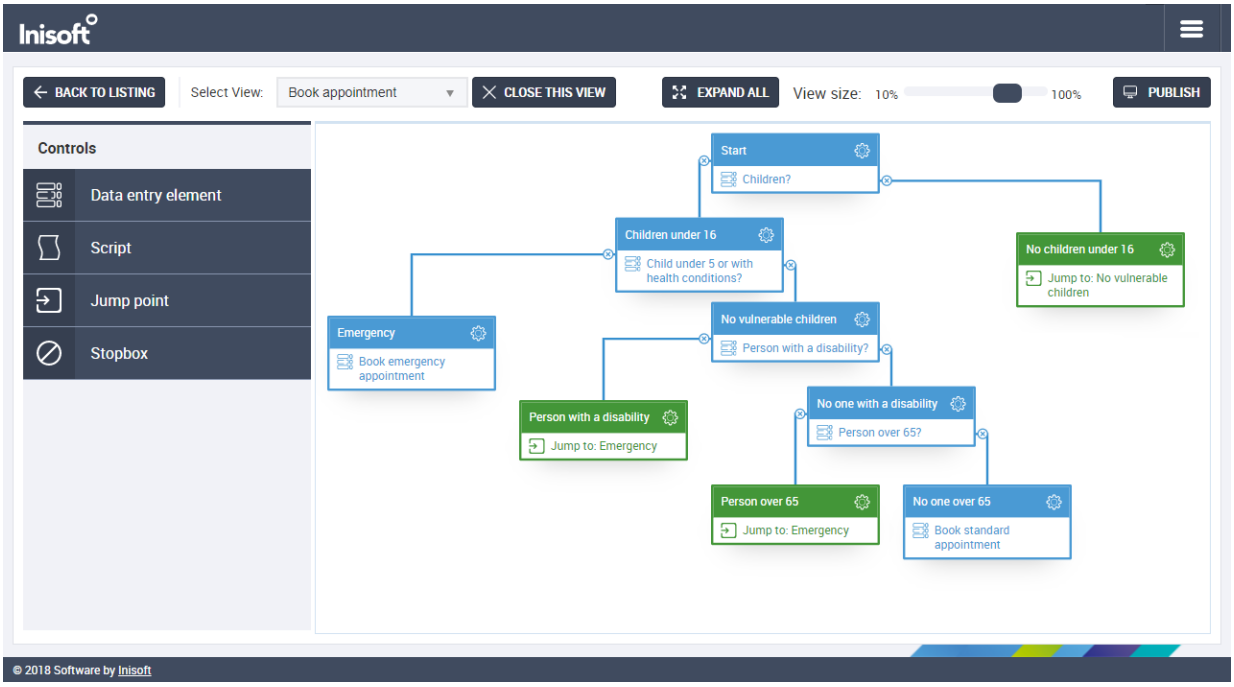


To progress in a script, an **exit condition** must be met, such as a radio button being clicked by the agent.

Once you've designed a script, add it to a desktop. A script itself is made up of one or (usually) more **script controls**. Data entry elements are the most common type of script control; you use data entry elements to instruct the agent what to do or say at each point in the call.

The following screenshot shows what a script looks like when it is being designed:

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6.11.6 Script Controls

This section describes the controls that you can add to a script.

6.11.6.1 Data entry element



A **data entry element** is a form that consists of one or more data entry controls, such as text boxes, radio buttons, and dropdowns.

You design data entry elements using the Data Entry Designer. From the Script Designer, you can create new data entry elements and view existing data entry elements.

Property	Description
Element name	Select the data entry element to use, or click + NEW to create a new data

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Property	Description
	entry element. If you choose to create a new data entry element, you'll have the option to open and start editing it straightaway.
Exit condition(s)	Defines the different branches that the script can take from here and, for each branch, the condition that must be met for that branch to be taken. For example, an exit condition might be the agent clicking a particular radio button. For each exit condition, the **Condition name** is the name of the exit condition (as shown in the script) and the **Condition** is the expression that determines when that path should be taken. Click the **Condition** box to show the Calculation Builder. (See Calculation Builder on page 492 for information about using that.) Click  to add an exit condition or  to delete an exit condition.
On enter log text	Type text to write to the SCRIPTLOGGING database table when the script reaches this point. Only logged where the agent reaches this point in the script by moving forward. Where the agent reaches this point by clicking  to move back, nothing is logged.
On exit log text	Type text to write to the SCRIPTLOGGING database table when the script leaves this point.
Run always	Type text to write to the SCRIPTLOGGING database table when the script

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Property	Description
log text	reaches this point. Logged every time that this point is reached, regardless of whether the agent is moving forward or backward through the script.
On enter actions	Select actions to perform when the script reaches this point. Only performed where the agent reaches this point in the script by moving forward. Where the agent reaches this point by clicking  to move back, these actions are not performed.
On leave actions	Select actions to perform when the script leaves this point.
Run always actions	Select actions to perform when the script reaches this point. Performed every time that this point is reached, regardless of whether the agent is moving forward or backward through the script.

6.11.6.2 Script



A **script** is another script that you have designed in the Script Designer.

You can break up a large and complex script into several smaller and more manageable subscripts and then link these together using script controls.

Property	Description
Script name	Select the script to use, or click  to create a new script.

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Property	Description
	If you choose to create a new script, you'll have the option to open and start editing it straightaway.
Exit condition(s)	Defines the different branches that the script can take after leaving the subscript and, for each branch, the condition that must be met for that branch to be taken. Click + ADD to add an exit condition or — to delete an exit condition.
On enter log text	Type text to write to the SCRIPTLOGGING database table when the script reaches this point. Only logged where the agent reaches this point in the script by moving forward. Where the agent reaches this point by clicking  to move back, nothing is logged.
On exit log text	Type text to write to the SCRIPTLOGGING database table when the script leaves this point.
Run always log text	Type text to write to the SCRIPTLOGGING database table when the script reaches this point. Logged every time that this point is reached, regardless of whether the agent is moving forward or backward through the script.
On enter actions	Select actions to perform when the script reaches this point. Only performed where the agent reaches this point in the script by moving forward. Where the agent reaches this point by clicking  to move back,

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Property	Description
	these actions are not performed.
On leave actions	Select actions to perform when the script leaves this point.
Run always actions	Select actions to perform when the script reaches this point. Performed every time that this point is reached, regardless of whether the agent is moving forward or backward through the script.

6.11.6.3 Jump point



Use a **jump point** to jump to any other element in your script.

Property	Description
Element to jump to	Select the element that you want to jump to.
On enter log text	Type text to write to the SCRIPTLOGGING database table when the script reaches this point.
On exit log text	Type text to write to the SCRIPTLOGGING database table when the script leaves this point.

6.11.6.4 Stopbox



Use a **stopbox** to end a script branch. When this point in a script is reached, the script closes.

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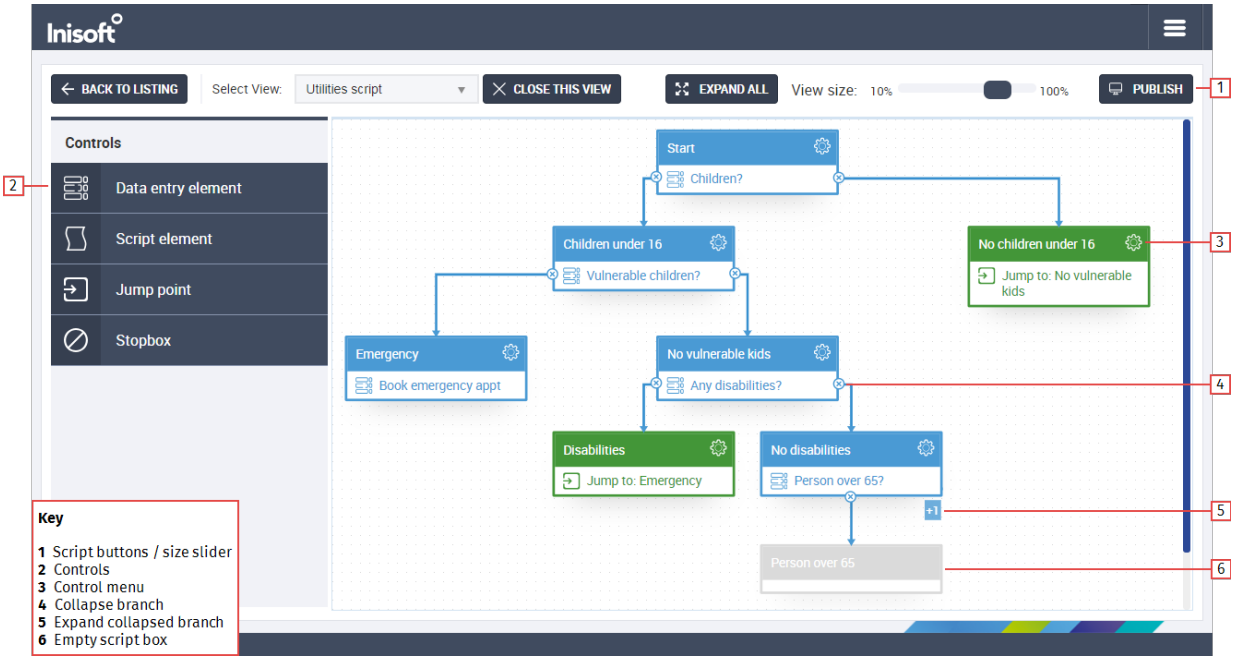
You don't *need* to end a script branch with a stopbox. It's perfectly valid to end a script branch with, say, a data entry element with no exit conditions. You could put a completion button on this data entry element.

If a script branch doesn't end with a stopbox, the agent can go back in the script, if required. Once a stopbox is reached, however, the script is closed and the agent can't retrieve it.

Property	Description
On enter log text	Type text to write to the SCRIPTLOGGING database table when the script reaches this point.

6.11.7 The Interface

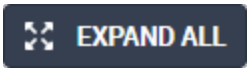
The layout of the Script Designer is as follows:



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6.11.7.1 Script Buttons / Size Slider

The following buttons and slider show at script-level.

Button	Description
	Click to expand all collapsed branches in the script.
Size slider	Drag the size slider to zoom in/out of the script.
	Click to publish the script for use at runtime (on your test environment). Whenever you update a script in Designer, you must publish it to see the changes you've made at runtime. You don't actually need to publish each element that a desktop uses individually. When you publish a desktop, this automatically publishes all scripts and data entry elements that the desktop uses. As such, you may find it easiest to always just publish from the desktop.

6.11.7.2 Controls

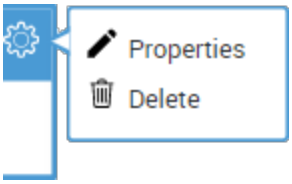
To add a control to your script, drag it from the **Controls** list to an empty script box.

For a full description of script controls, see Script Controls on page 452.

6.11.7.3 Control Menu

Click  on a script control to show the following menu:

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Option	Description
Properties	Click to edit the control's properties.
Delete	Click to delete the control. If you've already added exit conditions, you'll have the option to: » Delete the control and everything below it. » Delete the control but retain a particular branch. If you retain a branch, this branch will move up in the script to take the place of the deleted control.

6.11.7.4 Collapse Branch

When you're working on a script, you may only be interested in a particular part of it.

Click ⊗ to collapse a script branch that you're not working on. This helps you to focus on the branches you *are* working on.

6.11.7.5 Expand Collapsed Branch

For each control, Syntelate XA shows whether any script branches have been collapsed and, if so, how many: +2.

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To expand a script branch again, click this. Where more than one script branch has been collapsed, Syntelate XA will ask which branch you'd like to expand.



To quickly expand all collapsed branches in a script, click 

.

6.11.7.6 Empty Script Box

When you add an exit condition to a script control, this creates an empty script box. You can then drag another script control from the **Controls** list onto this empty script box.

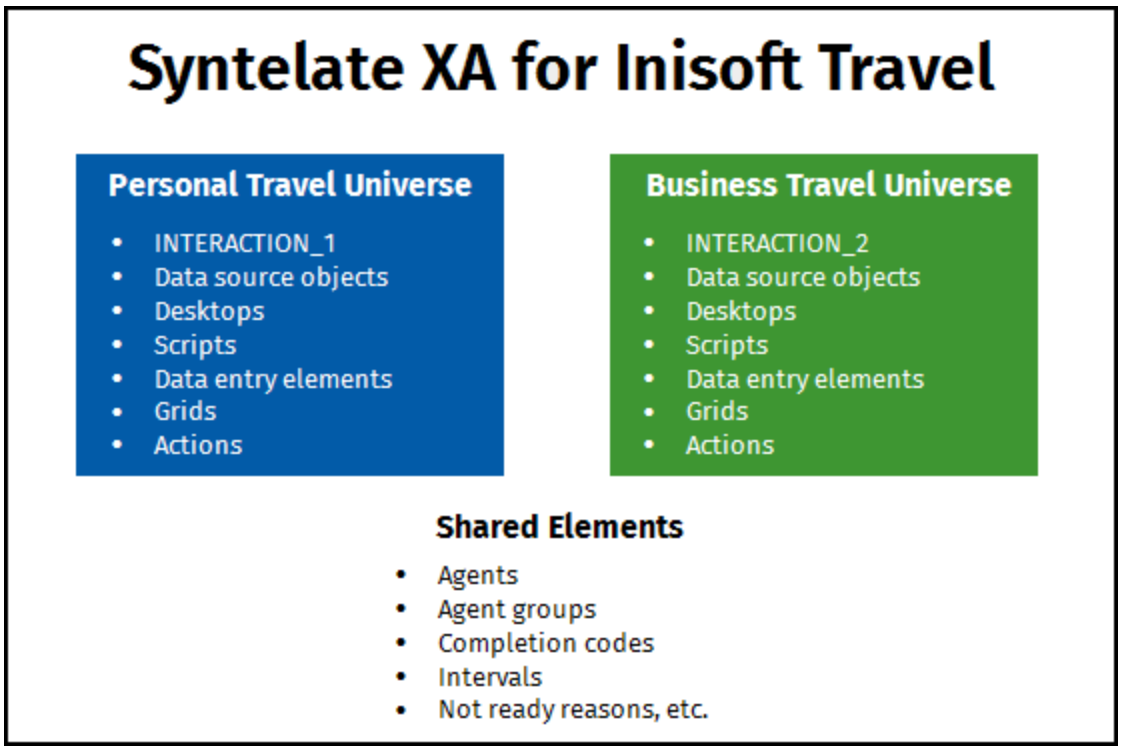
6.12 Universe Builder

Use the Universe Builder to design universes.

6.12.1 What Are Universes?

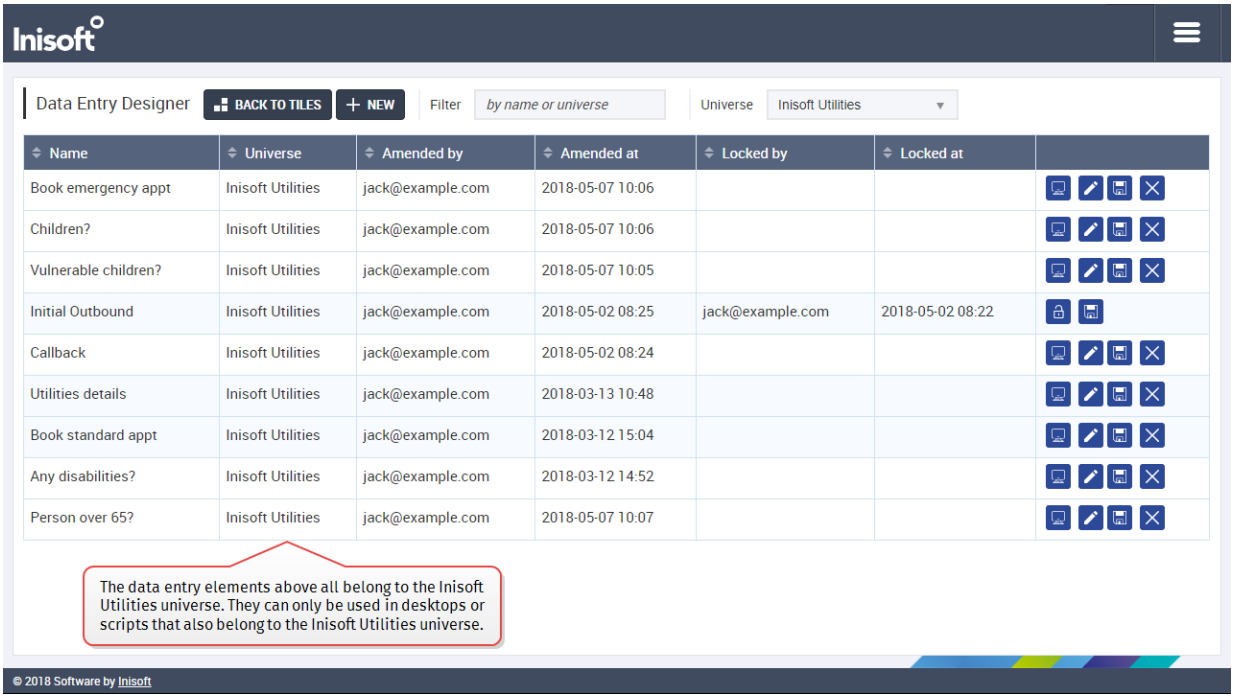
An installation of Syntelate XA can support multiple **universes**. The concept of universes makes it possible to separate data within a single installation of Syntelate XA.

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Designer elements in one universe cannot be accessed from another universe. For example, with reference to the above diagram, you could *not* add scripts or data entry elements in the Personal Travel universe to a desktop in the Business Travel universe.

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Whenever you create a new Designer element, such as a desktop, script, or workzone, you must specify the universe to which it should be added.

> **Note:** Non-Designer elements – such as agents, intervals, and completion codes – are *not* associated with a particular universe and so can be shared across universes.

6.12.2 Data Sources, Objects, and Links

When you build a universe in the Universe Builder, you can add data sources, data source objects, and data source object links. By doing this, you're defining from where Syntelate XA can read data, and to where it can write data, in this universe.

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6.12.2.1 Data Sources

A **data source** could be a database or an external CRM, for example. Every universe automatically has the Syntelate XA database configured as one data source, but you can add additional data sources.

6.12.2.2 Data Source Objects

A **data source object** is an object in a data source, such as a particular database table. For example, you may choose to store your customers' details in a table called CONTACT_X in your Syntelate XA database. If so, you would want to have this as a data source object in your universe. In the Data Entry Designer, you would then be able to create data entry elements that access this database table and its fields.

From the Universe Builder, you can create new tables in the Syntelate XA database to use as data source objects. You can also add new fields to existing tables in this database.

6.12.2.3 Data Source Object Links

A **data source object link** specifies the relationship between two data source objects. For example, where used, CONTACT_X would usually be linked to INTERACTION_X as follows:

Parent object name	Child object name	Parent field	Child field
CONTACT_X	INTERACTION_X	CONTACT_ID	CONTACTNUM

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CONTACT_X is the parent object, since there is a one-to-many relationship between CONTACT_X and INTERACTION_X: for a single customer in CONTACT_X, there can be many interactions in INTERACTION_X.

The CONTACTNUM field in INTERACTION_X references the CONTACT_ID field in CONTACT_X (the primary key). This is how each interaction record in INTERACTION_X is associated with a customer record in CONTACT_X.

6.12.3 Adding a Universe

There are two ways to add a new universe.

6.12.3.1 From the Universe Builder

To add a new universe from the Universe Builder, follow these steps:

1. In the list of universes, click 

.
2. In the **Universe name** box, type a name for the universe.
3. Select what database tables Syntelate XA should automatically create for your universe.

Here's some information about the tables that Syntelate XA can create for you:

- **Interaction table:** A table (INTERACTION_X) that contains one record for every interaction between an agent and a customer, regardless of channel.

  For agents to be able to handle interactions, an INTERACTION_X table is required. As such, select **Yes** unless you plan to manually create an INTERACTION_X table.

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- **Message tables:** The database tables required for email, SMS, and chat:
  - INTERACTION_X_MESSAGE
  - INTERACTION_X_MESSAGEATT
  - INTERACTION_X_NEWMESSAGE
  - INTERACTION_X_NEWMESSAGEATT

  If you will be handling these types of interaction, click **Yes** to create these database tables.

- **Standard contact table:** A CONTACT_X table for storing customer details. This includes some basic columns, but you can of course add other columns, depending on what information you want to store about your customers.

  Where you will use Syntelate XA to store customer details, we recommend you click **Yes**. Where customer details will instead be stored in an external CRM, click **No**.

6.12.3.2 From the Desktop Designer

You can also create a new universe when creating a new desktop in the Desktop Designer. You will be prompted to name your universe and to select which database tables you would like Syntelate XA to automatically create. For more information, see above.

6.12.4 Managing Data Source Object Links

Add data source object links to link two data source objects.

> **Note:** You can't link a data source object of type **Grid stored procedure**.

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6.12.4.1 Adding a Data Source Object Link

To add a data source object link, follow these steps:

1. Click 

above the list of data source object links.
2. Complete the dropdowns to specify which object is the parent and which the child in the link, and which fields are used to link the two objects.
3. Click **SAVE AND CLOSE**.

6.12.4.2 Editing a Data Source Object Link

To edit a data source object link, click  for the link that you want to edit. Edit its details as required and then click **SAVE AND CLOSE**.

6.12.4.3 Deleting a Data Source Object Link

To delete a data source object link, click  for the link that you want to delete. A dialog box shows, warning you that this will break any desktop that relies on this link. Click **DELETE** to confirm the deletion.

6.12.5 Managing Data Source Objects

Let's say you add an external database as a new data source. This does not automatically add all the tables in the database to your universe. Instead you must add each database table that you want to be included in your universe. To do that, add a new data source object for each table.

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This ensures that only those tables that are relevant to designers are presented in the Designer interfaces, such as the Data Entry Designer.

6.12.5.1 Types of Data Source Object

When you add a data source object, you must specify the type of object. Here is a description of each of the possible types.

Type	Description
Parent table	A database table that acts as the parent in a parent-child relationship with another database table or tables. Where Syntelate XA is used to store customer details, the CONTACT_X table is a parent table.
Grid table	A database table used for a grid.
Grid stored procedure	A stored procedure used for a grid.
Interaction table	The INTERACTION_X table.
Linked table	

6.12.5.2 Adding a Data Source Object

If you wish to add an existing database table, view, or stored procedure to your universe, you must add this as a data source object.

If you'd instead like to create a new table in your Syntelate XA database, you can do this directly from the Universe Builder while adding a new data source object.

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To add a new data source object, follow these steps:

1. Click  above the list of data source objects.

2. Select a data source and then type a description for the new data source object, then click **CONTINUE**. New fields show.

   > **Note:** You can't change the data source after continuing.

3. Select a **Data source object type** (see Types of Data Source Object on the previous page).

4. For the **Data source object name**, either:

   - Select an existing database table/view to use or, for a data source object type of **Grid stored procedure**, an existing stored procedure.
   - Add a new database table to use (where the data source is Current Connection only).

     > **Note:** Where creating a new table, you'll need to specify the name and data type of the primary key field and of one other field. To add further fields, click **ADD NEW FIELD** above **New table name**.

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5. Complete other fields as required:

   - **Primary key** *(optional)*: Select the field in the database table/view that is the primary key. Not applicable where the object type is **Grid stored procedure**.
   - **Row version field** *(optional)*: Select the field in the database table/view that is used for version-stamping rows. Not applicable where the object type is **Grid stored procedure**.
   - **Allow new fields?** Defines whether users can add fields to the data source object from elsewhere in the Designer, for example from the **Control properties** section of the Data Entry Designer. Only shows for objects of the Current Connection data source.
   - **Primary key counter key** *(optional)*: Select a record in the COUNT1 database table to use as the counter for the primary key in this table/view, or else add a new record to the COUNT1 table.
   - **Filter** *(optional)*: Type a filter in SQL to restrict what is included in this data source object, for example `FIELDX = 1` would only include records where field FIELDX is 1.

6. Click **SAVE AND CLOSE**.

6.12.5.3 Editing a Data Source Object

To edit a data source object, click  for the data source object that you want to edit. Edit its details as required and then click **SAVE AND CLOSE**.

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If you wish to add a new field to a database table in your Syntelate XA database, you can do this by editing the relevant data source object. After clicking  , click **EDIT EXISTING TABLE** and then **ADD COLUMN TO EXISTING TABLE**.

6.12.5.4 Deleting a Data Source Object

To delete a data source object, you must first delete any data source object links that refer to it.

Next click  for the data source object that you want to delete. A dialog box shows, warning you that this will break any desktop that uses this data source object. Click **DELETE** to confirm the deletion.

6.12.6 Managing Data Sources

By default all universes have a data source called **Current Connection**, which is the database on which Syntelate XA is running.

In addition, you can add external databases as other data sources. There are two types:

- **External database:** Another database (not the one on which Syntelate XA is running).
- **A web service:** A web service that Syntelate XA can use.

6.12.6.1 Adding a Data Source

To add a new data source, click 

above the list of data sources. Complete the fields as required and then click **SAVE AND CLOSE**.

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6.12.6.2 Editing a Data Source

To edit a data source, click  for the data source that you want to edit. Edit its details as required and then click **SAVE AND CLOSE**.

> **Note:** You cannot edit the Current Connection data source.

6.12.6.3 Deleting a Data Source

To delete a data source, you must first delete any data source object links and data source objects that you have created for the data source.

Next click  for the data source that you want to delete. A dialog box shows. Click **DELETE** to confirm the deletion.

> **Note:** You cannot delete the Current Connection data source.

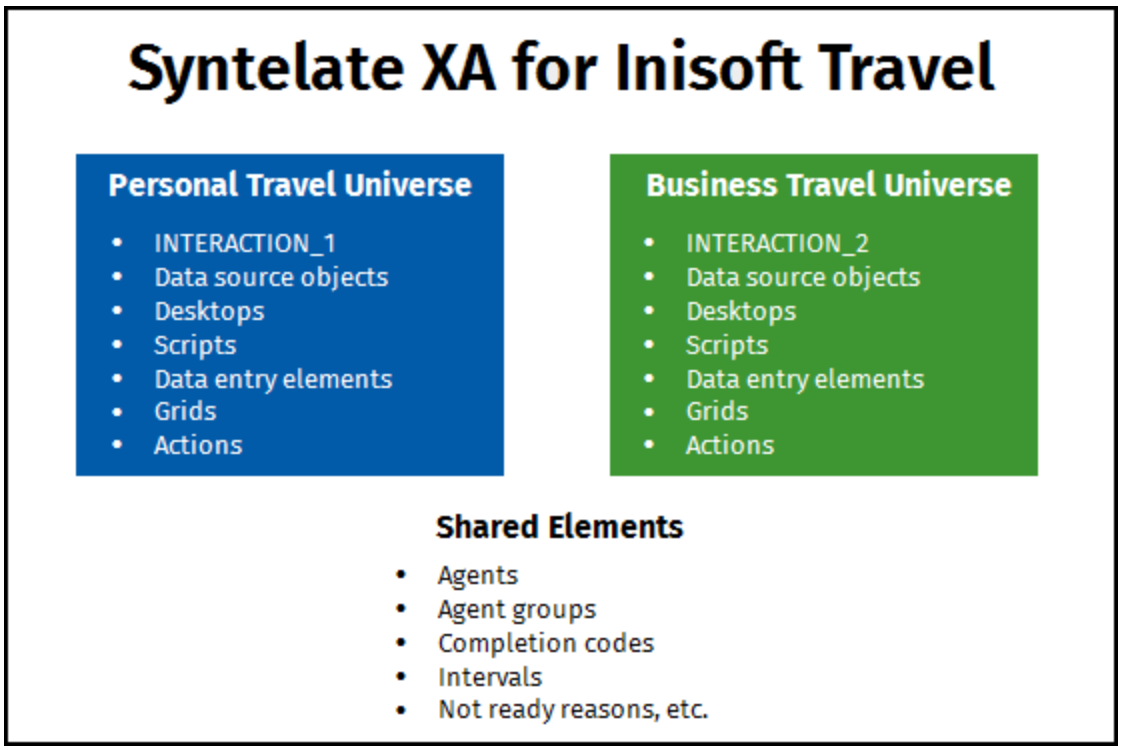
6.12.7 Universe Builder

Use the Universe Builder to design universes.

6.12.7.1 What Are Universes?

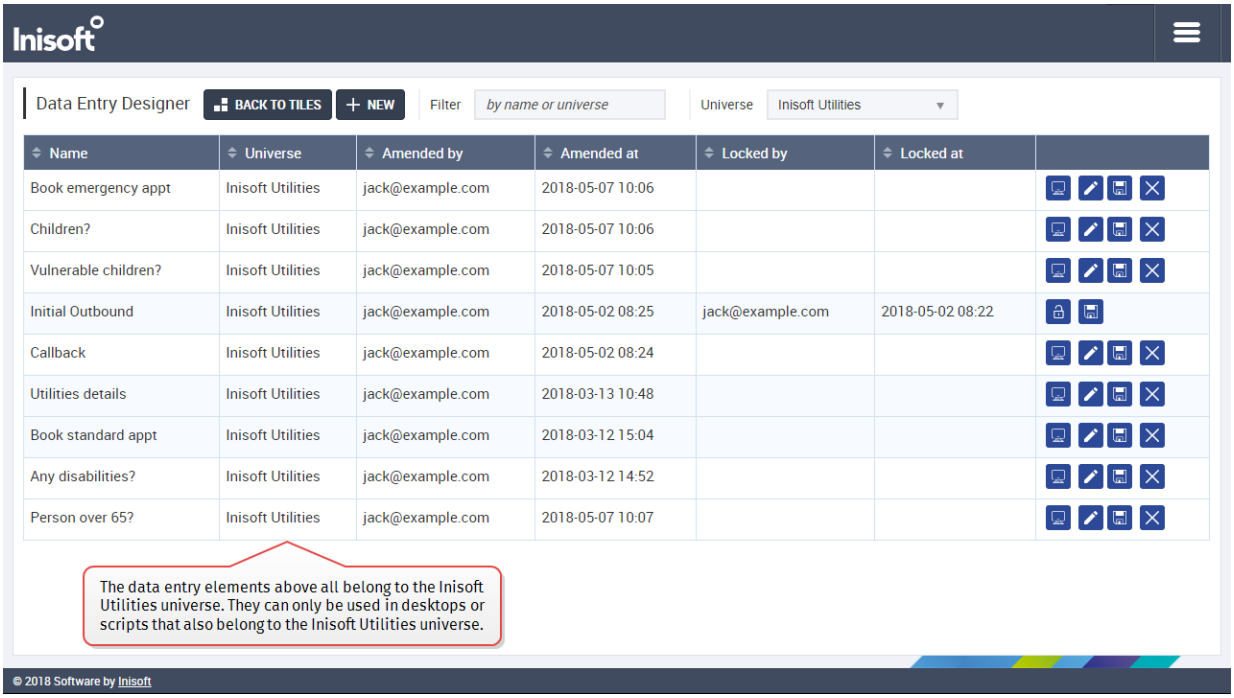
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Designer elements in one universe cannot be accessed from another universe. For example, with reference to the above diagram, you could *not* add scripts or data entry elements in the Personal Travel universe to a desktop in the Business Travel universe.

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Whenever you create a new Designer element, such as a desktop, script, or workzone, you must specify the universe to which it should be added.

Note: Non-Designer elements – such as agents, intervals, and completion codes – are *not* associated with a particular universe and so can be shared across universes.

6.12.7.2 Data Sources, Objects, and Links

When you build a universe in the Universe Builder, you can add data sources, data source objects, and data source object links. By doing this, you're defining from where Syntelate XA can read data, and to where it can write data, in this universe.

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Data Sources

A **data source** could be a database or an external CRM, for example. Every universe automatically has the Syntelate XA database configured as one data source, but you can add additional data sources.

Data Source Objects

A **data source object** is an object in a data source, such as a particular database table. For example, you may choose to store your customers' details in a table called CONTACT_X in your Syntelate XA database. If so, you would want to have this as a data source object in your universe. In the Data Entry Designer, you would then be able to create data entry elements that access this database table and its fields.

From the Universe Builder, you can create new tables in the Syntelate XA database to use as data source objects. You can also add new fields to existing tables in this database.

Data Source Object Links

A **data source object link** specifies the relationship between two data source objects. For example, where used, CONTACT_X would usually be linked to INTERACTION_X as follows:

Parent object name	Child object name	Parent field	Child field
CONTACT_X	INTERACTION_X	CONTACT_ID	CONTACTNUM

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CONTACT_X is the parent object, since there is a one-to-many relationship between CONTACT_X and INTERACTION_X: for a single customer in CONTACT_X, there can be many interactions in INTERACTION_X.

The CONTACTNUM field in INTERACTION_X references the CONTACT_ID field in CONTACT_X (the primary key). This is how each interaction record in INTERACTION_X is associated with a customer record in CONTACT_X.

6.13 Version Control

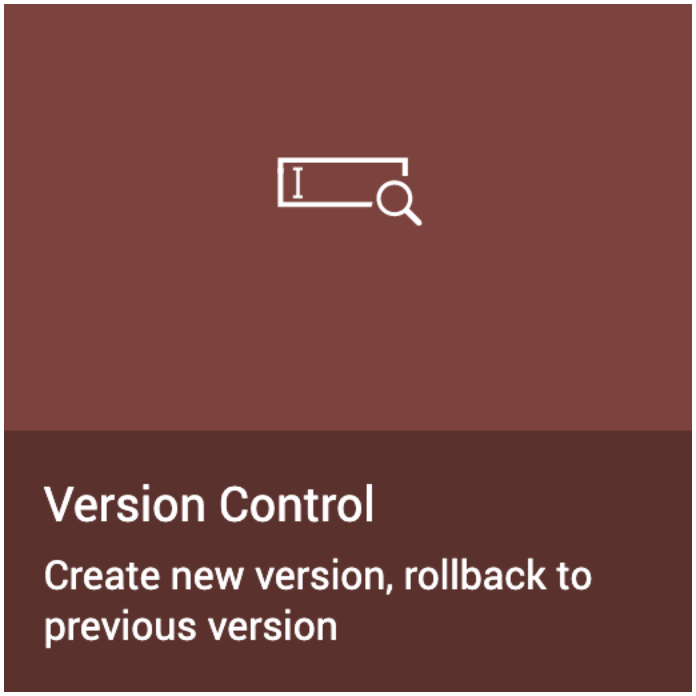
6.13.1 Overview

Version Control is part of **Designer**.

Use **Version Control** to manage multiple versions of your Syntelate XA data universes in your test environment.

As well as helping you manage versions in your test environment, **Version Control** lets you migrate an active version to your live environment.

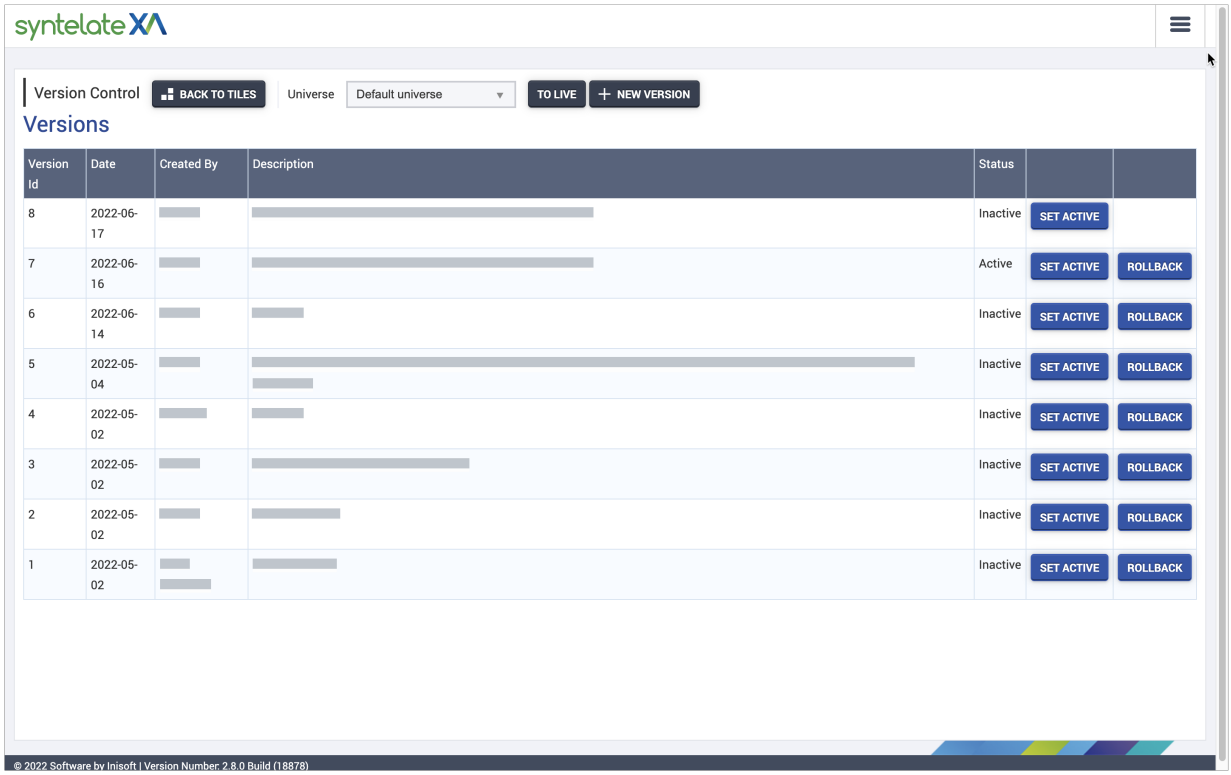
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6.13.2 The Interface

In **Version Control** the interface is like many other **Designer** tiles. There is a bar at the top of the screen and a grid in the main area.

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6.13.2.1 **Version Control** Bar

The **Version Control** bar offers the following options:

- **BACK TO TILES**: Return to Designer's home page.
- **Universe**: Select a universe to view version history for.
- **TO LIVE**: Migrate the newest version (the version with the highest ID number) to your live environment.
- **+ NEW VERSION**: Create a copy of the most recently created version (the version with the highest ID number), whether it's active or inactive.

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6.13.2.2 Versions Grid

The version history of a universe is displayed as a list in the **Versions** grid. The versions are listed in reverse chronological order and are assigned an ID number.

> **Tip:** **Version Control** lets you manage the versions of only one data universe at a time. This means that when you open **Version Control**, you will not see the **Versions** grid until you select a universe from the **Universe** dropdown in the bar.

The information presented in the grid is as follows:

- **ID**: A counter that helps you manage the various versions you might have. The ID of the first version will be 1, and subsequent versions will be assigned the next number in the sequence 1, 2, 3, 4, etc.
- **Date**: The date when the version was created.
- **Created by**: The name of the user who created the version.
- **Description**: The description note tells you if a version has been migrated to your live environment, or if it has been rolled back, or copied. In those cases, the description is provided automatically by Syntelate XA. The only scenario in which you will be asked to provide the description is after you click **+ NEW VERSION** to create a new version.
- **Status**: Tells you if the version is active or inactive.
- **SET ACTIVE**: Button to activate a version in your test environment. Only one

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- version can be active at one time.
- **ROLLBACK**: A button that forces an older version to become the current version. This is known as rolling back.

> **Note:** The **ROLLBACK** button is only present when there is more than one version of a universe.

6.13.3 Tasks

Using the options provided in the bar and the grid you can perform the following tasks:

- Create a new version of your Syntelate XA data universe.
- Activate a new version or an old version when you want to test them.
- Migrate the newest version to your live environment.
- Rollback to an older version. This forces Syntelate XA to discard any changes made in the currently active version in the test environment.

Explore the **In this section** menu for instructions and guidance on performing those tasks.

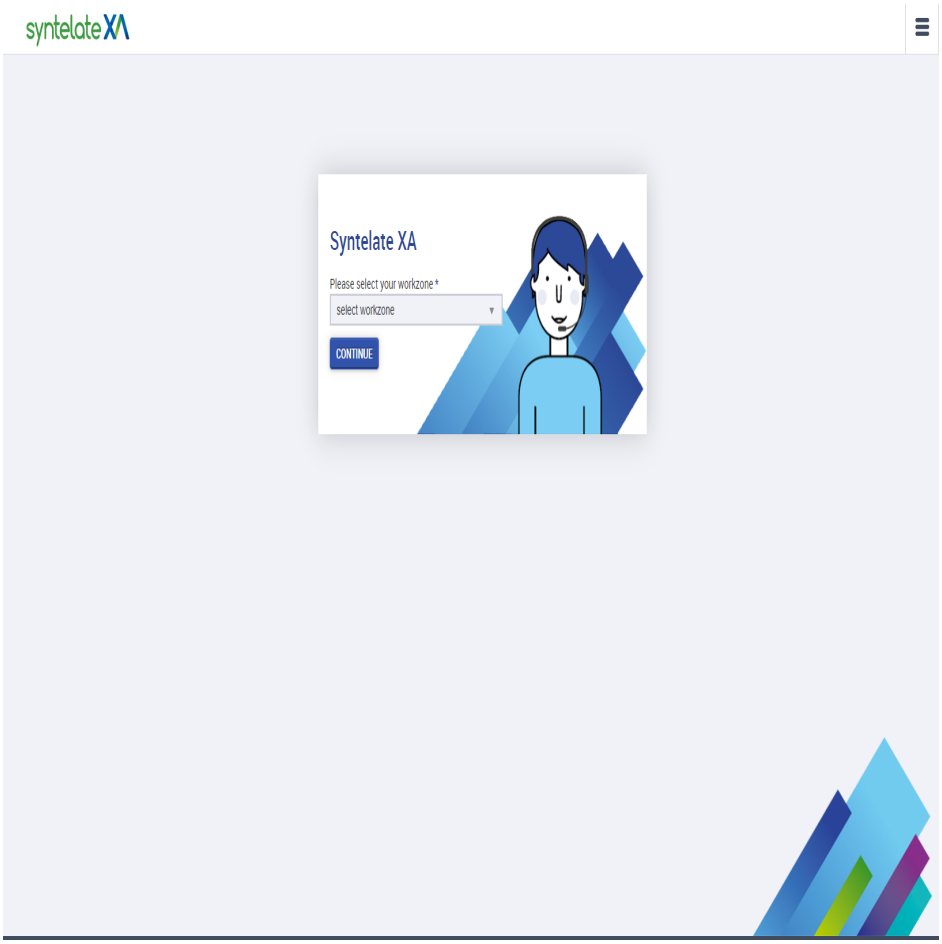
6.14 Workzone Editor

Use the **Workzone Editor** tile to create and manage workzones.

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6.14.1 Workzones

A **workzone** is an area of your contact center business that agents can log in to. Where an agent has access to more than one workzone, they will be asked which workzone they want to use when logging in to Syntelate XA.



EXAMPLE

Inisoft Travel has two workzones:

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- Personal Travel
- Business Travel

6.14.2 Workzones and Desktops

You can associate each workzone with a desktop. Agents will then see that desktop when logging in to the workzone.

Often there's a one-to-one relationship between a desktop and a workzone, but this needn't be the case. You can associate a single desktop with multiple workzones.

The main reason for associating multiple workzones with the same desktop is to control the type of interactions that agents are passed. This is done in association with the Worklist EngineWorklist Engine.

EXAMPLE

Inisoft Travel has a single desktop that is used by both the Personal Travel and the Business Travel workzones.

When an agent logs in to the Personal Travel workzone, Syntelate XA only passes the agent calls, emails, and chats from personal travel customers.

Similarly, when an agent logs in to the Business Travel workzone, Syntelate XA only passes the agent calls, emails, and chats from business travel customers.

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6.14.3 Restricting Access to Workzones

You don't assign agents to workzones. Rather, by default, every agent can access all workzones. An agent with default access permissions will be shown the **Please select your workzone** list after logging in to Syntelate XA.

However, you *can* restrict access to a particular workzone. You do this by associating the workzone with a particular agent group. (Unlike workzones, you *do* assign agents to agent groups.)

Where a workzone has been restricted to an agent group, only agents who belong to that group see the workzone listed in the **Please select your workzone** list.

Where an agent only has access to a single workzone, they are not prompted to select a workzone upon logging in to Syntelate XA. Instead, they are immediately logged in to that workzone.

6.14.4 Other Things

Below are some other things that the workzone controls.

6.14.4.1 Worklist Engine

If you wish to use the Worklist Engine with your workzone, you must activate it. Otherwise, agents won't be passed any outbound calls, emails, or chats, since the Worklist Engine handles those types of interaction record.

If agents should only be passed inbound calls, then you can safely leave the Worklist Engine turned off for the workzone.

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6.14.4.2 Reserve Agents for Inbound Calls

Reserve agents help you manage competing demands for web chat and inbound calls in workzones that blend inbound calls with web chat. **Reserve agents for inbound calls** is a setting in the Workzone Editor that, when switched on and configured, tells the Worklist Engine to automatically and randomly place the specified number of agents in this workzone into a reserve list.

As a result, when the reserved agents have completed their current web chat, they will be passed an inbound call.

When the inbound call is complete, the agent will be released from the reserve list and able to return to web chats.

6.14.4.3 CTI

It's at the level of the workzone that you indicate which CTI (Computer Telephony Integration) solution should be used, if any.

If agents should only handle emails or chats, for example, then you don't have to configure a CTI solution.

If, however, agents will handle calls, then you must set up a CTI solution.

Syntelate XA supports various CTI solutions. For more information, see document *Syntelate XA - Overview of Channels*.

6.14.4.4 CRM

It's also at the level of the workzone that you indicate whether a separate customer relationship management system should be used, such as Salesforce.

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For information about configuring Syntelate XA to work with Salesforce, see document *Syntelate XA - Configuring Salesforce*.

6.14.4.5 Interval Group

You can also associate an interval group with a workzone. If you do, date box with intervals controls in the workzone will use this interval group (unless overridden with another interval group in the control's properties).

6.14.5 Adding a Workzone

There are two ways to add a new workzone.

6.14.5.1 From the Desktop

In the Desktop Designer, click 

to automatically create a workzone for your desktop.

This workzone will have the same name as the desktop, and it will be associated with the desktop.

You won't have the option to configure any of the workzone's details, so to set up a CTI solution, activate the Worklist Engine, or anything like that, you'll have to go into the Workzone Editor and edit the workzone that was automatically created.

6.14.5.2 From the Workzone Editor

You can also add a new workzone from the Workzone Editor. To do this, follow these steps:

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1. In the list of workzones, click 

.
2. In the **Name** box, type a name for the workzone.
3. In the **Universe** dropdown, select the universe to which this workzone should be added.
4. Click 

.

You'll then be shown the workzone's full configuration options. Each field has help text, which explains what it does, but there are some additional notes below.

Once you have configured the workzone as you require, click 

.

6.14.5.3 CTI

For information on configuring a workzone for a particular CTI solution, see document *Syntelate XA - Overview of Channels*.

6.14.5.4 Reserve agents for inbound calls

Before you enable **Reserve agents for inbound calls**, consider whether you want all agent groups to be available to handle inbound calls, or only certain groups. For example, a group of agents in training might not be skilled enough yet to handle inbound calls.

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- If it's okay for agents in any group to be reserved for inbound calls, go to the section How to Set Reserve Agents.
- If you need to specify only one or some agent groups to be part of the reserve list, continue to the next section, **Reserve Agents from Specific Groups**.

Reserve Agents from Specific Groups

To exclude agents in certain agent groups from being reserved, you need to create a standard workzone for those groups, and then create a separate workzone for the groups that will be reserved.

In each workzone, use the **Show workzone to all users?** setting in the Workzone Editor to choose the groups that will log on to the workzone.

For the workzone that you want to reserve agents in, follow the guidance below in **How to Set Reserve Agents.**

How to Set Reserve Agents

For **Reserve agents for inbound calls**, choose **Yes**.

For **Number of agents to reserve**, enter a number, such as **2**.

6.14.5.5 CRM

For information on configuring a workzone to work with Salesforce, see document *Syntelate XA - Configuring Salesforce*.

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6.14.5.6 Show workzone to all users?

To restrict the workzone only to agents in a particular agent group (or groups), set **Show workzone to all users?** to **No**. Section **Agent Group Allocation** then appears.

Under **Unallocated items**, select the agent group (or groups) that should be able to access the workzone, and then click **Add**.

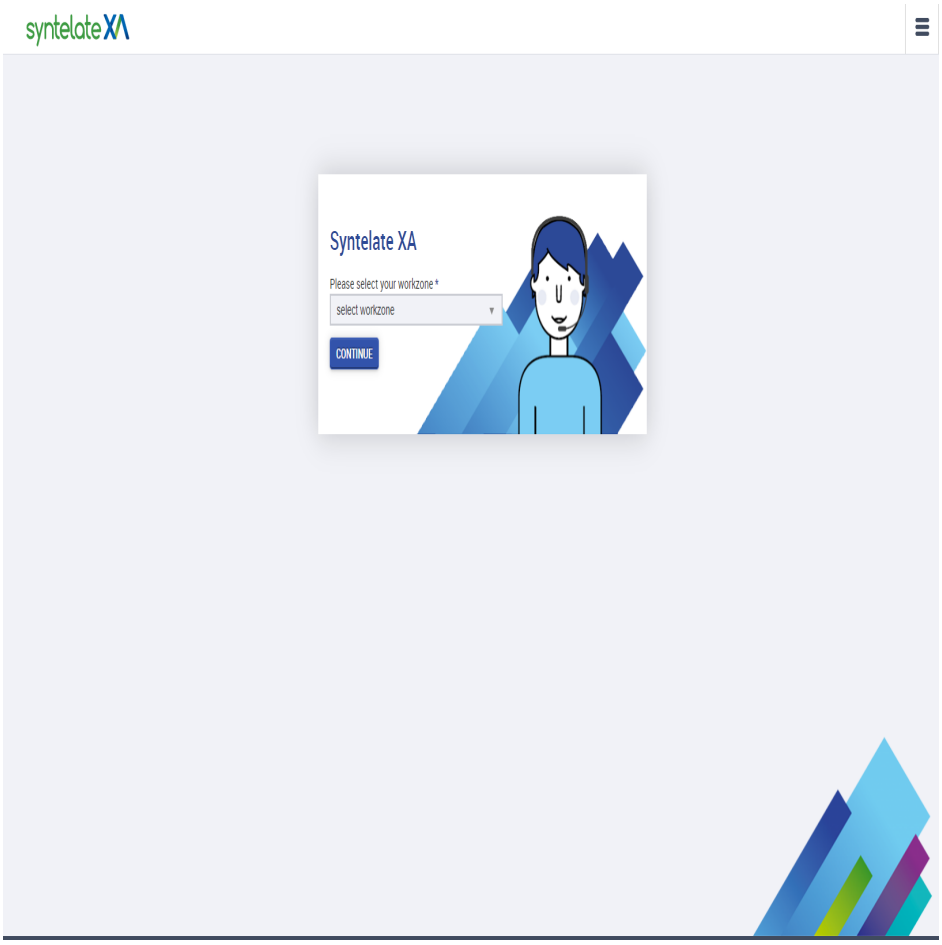
6.14.6 Workzone Editor

Use the **Workzone Editor** tile to create and manage workzones.

6.14.6.1 Workzones

A **workzone** is an area of your contact center business that agents can log in to. Where an agent has access to more than one workzone, they will be asked which workzone they want to use when logging in to Syntelate XA.

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EXAMPLE

Inisoft Travel has two workzones:

- Personal Travel
- Business Travel

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6.14.6.2 Workzones and Desktops

You can associate each workzone with a desktop. Agents will then see that desktop when logging in to the workzone.

Often there's a one-to-one relationship between a desktop and a workzone, but this needn't be the case. You can associate a single desktop with multiple workzones.

The main reason for associating multiple workzones with the same desktop is to control the type of interactions that agents are passed. This is done in association with the Worklist EngineWorklist Engine.

> **EXAMPLE**
>
> Inisoft Travel has a single desktop that is used by both the Personal Travel and the Business Travel workzones.
>
> When an agent logs in to the Personal Travel workzone, Syntelate XA only passes the agent calls, emails, and chats from personal travel customers.
>
> Similarly, when an agent logs in to the Business Travel workzone, Syntelate XA only passes the agent calls, emails, and chats from business travel customers.

6.14.6.3 Restricting Access to Workzones

You don't assign agents to workzones. Rather, by default, every agent can access all workzones. An agent with default access permissions will be shown the **Please select your workzone** list after logging in to Syntelate XA.

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However, you *can* restrict access to a particular workzone. You do this by associating the workzone with a particular agent group. (Unlike workzones, you *do* assign agents to agent groups.)

Where a workzone has been restricted to an agent group, only agents who belong to that group see the workzone listed in the **Please select your workzone** list.

Where an agent only has access to a single workzone, they are not prompted to select a workzone upon logging in to Syntelate XA. Instead, they are immediately logged in to that workzone.

6.14.6.4 Other Things

Below are some other things that the workzone controls.

Worklist Engine

If you wish to use the Worklist Engine with your workzone, you must activate it. Otherwise, agents won't be passed any outbound calls, emails, or chats, since the Worklist Engine handles those types of interaction record.

If agents should only be passed inbound calls, then you can safely leave the Worklist Engine turned off for the workzone.

Reserve Agents for Inbound Calls

Reserve agents help you manage competing demands for web chat and inbound calls in workzones that blend inbound calls with web chat. **Reserve agents for inbound calls** is a setting in the Workzone Editor that, when switched on and configured, tells the Worklist

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Engine to automatically and randomly place the specified number of agents in this workzone into a reserve list.

As a result, when the reserved agents have completed their current web chat, they will be passed an inbound call.

When the inbound call is complete, the agent will be released from the reserve list and able to return to web chats.

CTI

It's at the level of the workzone that you indicate which CTI (Computer Telephony Integration) solution should be used, if any.

If agents should only handle emails or chats, for example, then you don't have to configure a CTI solution.

If, however, agents will handle calls, then you must set up a CTI solution.

Syntelate XA supports various CTI solutions. For more information, see document *Syntelate XA - Overview of Channels*.

CRM

It's also at the level of the workzone that you indicate whether a separate customer relationship management system should be used, such as Salesforce.

For information about configuring Syntelate XA to work with Salesforce, see document *Syntelate XA - Configuring Salesforce*.

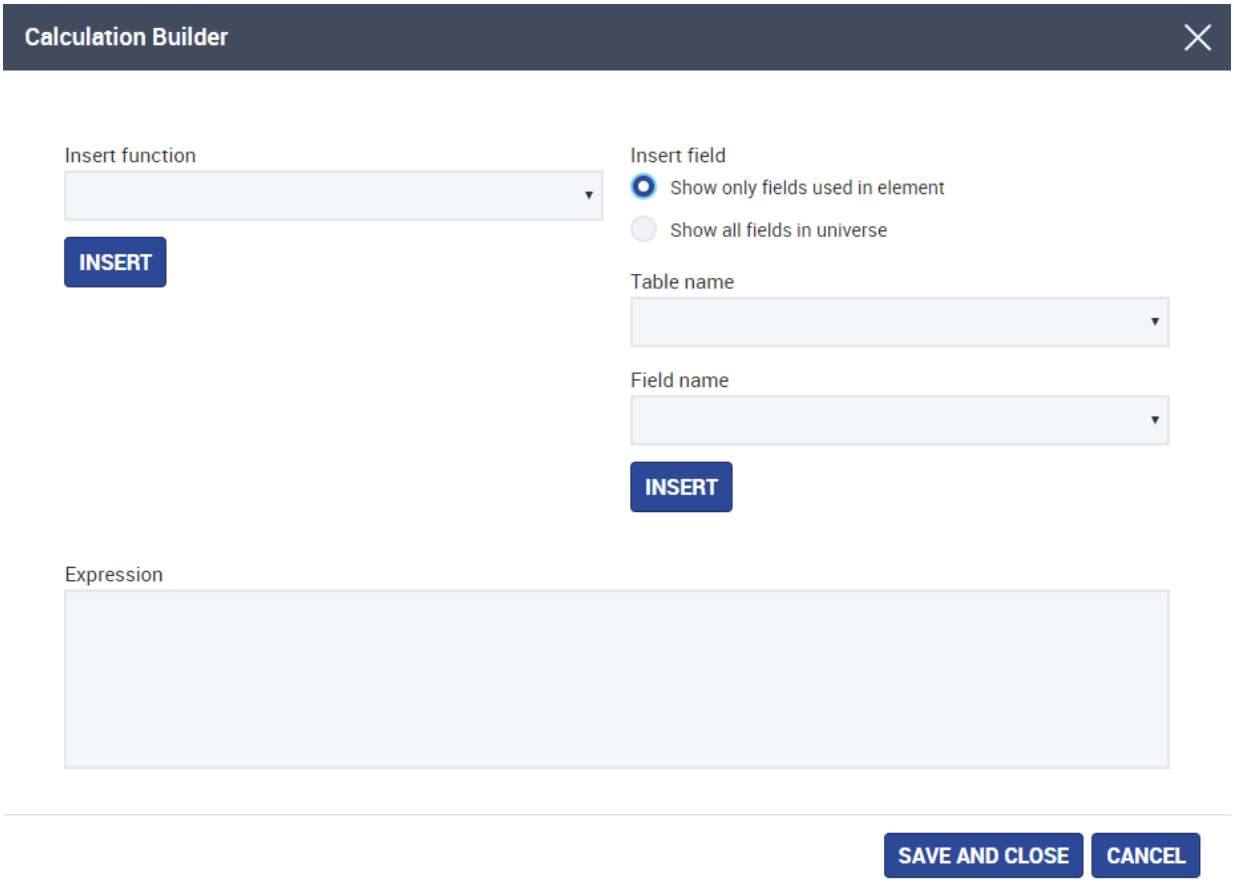
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Interval Group

You can also associate an interval group with a workzone. If you do, date box with intervals controls in the workzone will use this interval group (unless overridden with another interval group in the control's properties).

6.15 Calculation Builder

Various controls in the Script Designer, Data Entry Designer, and Grid Designer give you access to the Calculation Builder.



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The Calculation Builder lets you write expressions in SQL and JavaScript. You can freely enter any JavaScript in your expression. You can also build up expressions by using the functions provided in the dropdown.

6.15.1 Inserting a Function

To add a function to your expression, select the function that you want to add and then click **INSERT**. The function is added to your expression in the format `functionName (parameter1, parameter2)`.

To use the function, you must specify the parameter values (arguments). Each function has a different number of parameters.

For each parameter, you can pass:

- A value that you enter manually.
- A database field, entered either manually or by using the table and field dropdowns.
- Another function (in other words, you can **nest functions**).

A nested function looks like this: `functionA(functionB(argumentB1, argumentB2), argumentA2)`. In the example below, functionB is passed as the first parameter of functionA.

> **EXAMPLE**
>
> Jack at Inisoft Travel wants to display the customer's age to the agent. Inisoft Travel store the customer's date of birth in field DOB in the CONTACT table.

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Jack drags a calculation control onto a data entry element. He then edits its **Expression** property to open the Calculation Builder. Here he does the following:

1. In the **Insert function** dropdown, Jack selects **calculateAge**. He clicks **INSERT**.

   The **Expression** box now looks as so: `calculateAge( birthDate , otherDate )`

2. In the **Expression** box, Jack double-clicks `birthDate`to select it. In the **Table name** dropdown, he selects CONTACT. In the **Field name** dropdown, he selects DOB. He clicks **INSERT**.

   The **Expression** box now looks as so: `calculateAge( [CONTACT.DOB] , otherDate )`

3. In the **Expression** box, Jack double-clicks `otherDate`to select it. In the **Insert function** dropdown, he selects **now**. He clicks **INSERT**.

   The **Expression** box now looks as so: `calculateAge( [CONTACT.DOB] , now () )`

That's it! At runtime, the calculation will show the customer's current age.

6.15.2 Inserting a Database Field

To insert a database field into your expression, first select whether to:

- **Show only fields used in element:** Shows only tables and fields that are used by controls in the data entry element.
- **Show all fields in universe:** Shows all tables and their fields.

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To add a database field, select the database table in the **Table name** dropdown and then the database field in the **Field name** dropdown. Last, click **INSERT**.

6.15.3 Descriptions of Functions

The following table describes the functions that you can use.

Function	Description
Date Functions	
addHours(startDate, hours)	Given a date and time and a number of hours, adds the hours to the date and time and returns a new date and time.
addMinutes(startDate, minutes)	Given a date and time and a number of minutes, adds the minutes to the date and time and returns a new date and time.
calculateAge(birthDate, otherDate)	Returns the age of a person on a particular date given their birth date.
now()	Returns the current date and time.
Number Functions	
random(minValue, maxValue)	Returns a random integer between a given minimum value and maximum value.
String Functions	

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Function	Description
lower(value)	Converts the string to lowercase.
stringLength(value)	Returns the number of characters in the string.
stringReplace(stringValue, toReplace, replaceWith, replaceAll, ignoreCase)	Replaces characters (toReplace) in a string (stringValue) with other characters (replaceWith). Set replaceAll to true to replace all occurrences in the string or to false to replace only the first occurrence. Set ignoreCase to true to ignore differences in case or to false to perform case-sensitive replacements.
stringsEqual(value, value2, ignoreCase)	Compares two strings and returns true if they are the same or false if they are not. Set ignoreCase to true to ignore differences in case or to false to perform case-sensitive replacements.
upper(string)	Converts the string to uppercase.

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7. Reporting

This topic is for technical users who want to know how reporting and analytics work in Syntelate XA. Here you'll find an overview of the types of reports available and where they are displayed, as well as a description of the database tables used for each channel's reporting (i.e., voice, chat, and email).

7.1 What Reporting Includes

In Syntelate XA, reporting includes both real-time and historical activity across your contact center. There are three types of report available for each channel:

1. Real time: shows a summary view of the current day's activity so far.
2. Current status: shows what is happening now for each channel.
3. Historical: shows a view of the historical data for the customer experience and, as a separate report, for the agent experience.

Reporting records every change of state for interactions across all channels. For each interaction, this makes it possible to determine things like:

- **For voice calls:** How long the customer spent on hold during the call
- **For emails:** How long the agent spent replying to the email
- **For web chat:** How long it took for the customer to be connected to an agent.

You can use the captured data to, for example, report on average handling time, whether for an individual agent or for all agents in an agent group, and whether across the last hour or across the last month. You can also generate reports at regular intervals, for example every 15 minutes or every hour.

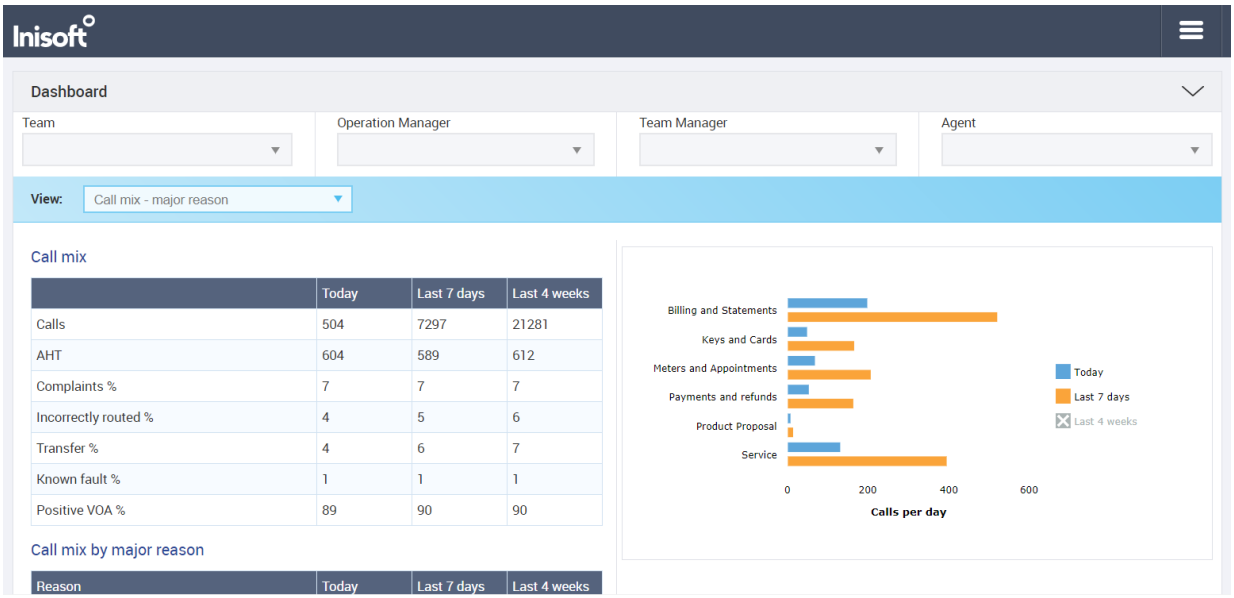
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7.2 Viewing Reports

In Syntelate XA, you can make reporting data visible to both supervisors and agents. For supervisors, reporting data is displayed on a Syntelate XA Dashboard Desktop. For agents, reporting data is displayed on a Syntelate XA Agent Desktop.

7.2.1 Showing Reports on Dashboard Desktops

Here is an example of a Syntelate XA Dashboard Desktop providing data on call activity.

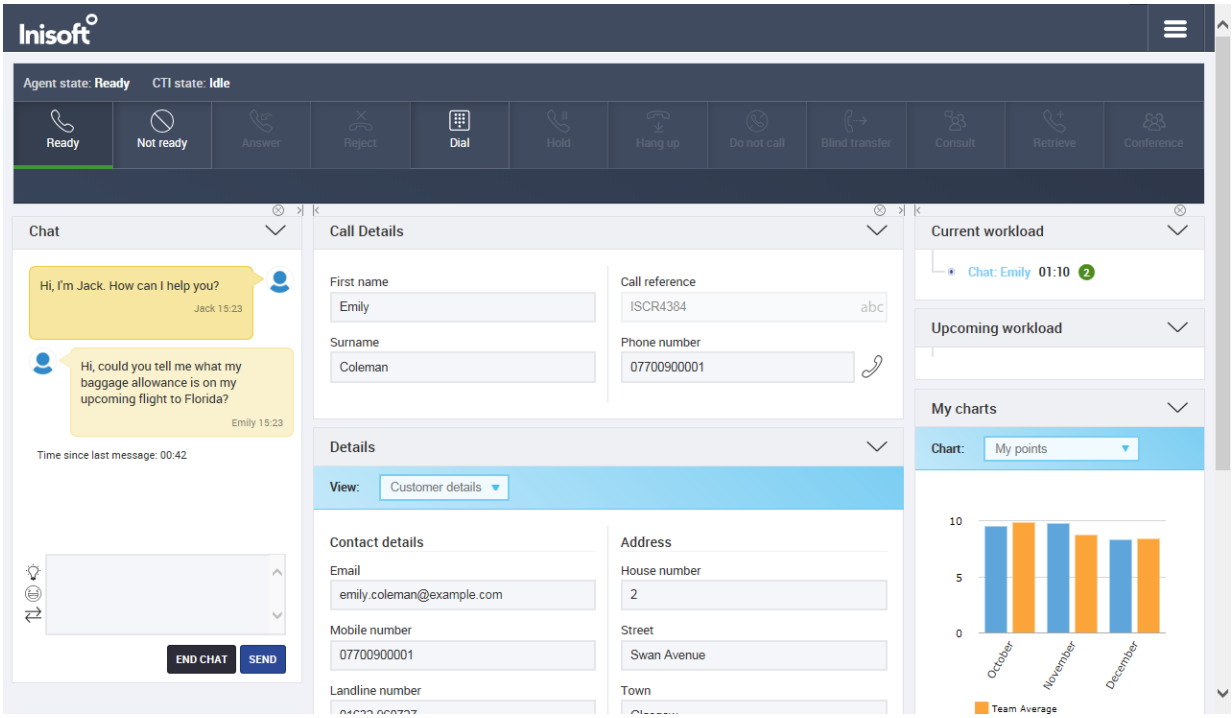


You can see more examples of reports in the Dashboard Desktop section of *Syntelate XA - Supervisor*.

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7.2.2 Showing Reporting Data on Agent Desktops

You can also show reporting data on a Syntelate XA Agent Desktop. The following screenshot shows a chart on an agent's desktop that displays the agent's average handling time against their team's average handling time for the last three months.



> **Tip:** For information about designing charts, see the Charting Editor documentation (online only).

7.3 Setting Up Reporting

For voice and email channels, Inisoft works with you to design the reporting that you need, and we make sure it's added to your Syntelate XA Dashboard Desktop and

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Syntelate XA Agent Desktop.

The process is slightly different for chats (whether web, SMS, or social media), because you can use Syntelate Studio to enable or disable full reporting at any time. Full reporting for chats records a range of events that might occur in a chat. We call these events **call states**.

There are many **call states** that Syntelate XA records across each channel, such as the event of the agent's first message being sent, the customer's last message being sent, and so on. For a full description of the call states that are recorded, see Call States below.

Alternatively, you can disable full reporting, in which case Syntelate XA records only the start and end of each chat (with call states WorklistItemPop and WorklistItemClose).

To enable full reporting for a chat, use the **Enable reporting** field in the appropriate message gateway. For more information and instructions, see document *Syntelate XA - Message Gateway Configuration*.

7.4 Call States

A **call state** tells you the status of an agent, customer, or interaction record, on voice, email or chat channels. So, **call state** refers to chat and email as well as telephony.

When reporting is enabled, Syntelate XA records every change of call state in the CALLSTATUSLOGGING table.

This section describes the various call states.

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7.4.1 General

Syntelate XA records events such as the agent going ready. The following table describes these general call states.

Call State	Description
LoginWorkzone	The agent logs in to a workzone in Syntelate XA.
LogoutWorkzone	The agent logs out of a workzone in Syntelate XA.
Ready	The agent goes ready in Syntelate XA.
PendingNotReady	The agent goes pending not ready in Syntelate XA. The agent will be set to not ready when they complete their current interaction.
NotReady	The agent goes not ready in Syntelate XA.
Waiting	The agent is in a ready state and is waiting to receive an inbound call or to be passed an interaction record by the Worklist Engine.
Idle	The agent is in a not ready state and will not receive any inbound calls or be passed any interaction records by the Worklist Engine.
WorklistItemPop	An email or chat pops on the agent's desktop (in other words, they're passed an interaction record by the Worklist Engine).
Worklist	The agent starts working on an email interaction.
WorklistItemClose	The agent closes an email or chat.

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Call State	Description
Cleared	
Completed	The agent completes a voice call / email (including cancel preview).
Delivered	

7.4.2 Voice

The following table describes the various voice call states.

Call State	Description
Preview	The agent is passed an outbound call in preview.
Dial	Syntelate XA attempts to dial the customer (outbound call).
Dialling	The agent's phone is dialing (outbound call). **Note:** You may be wondering why the call states Dial and Dialling are both required. Well, let's say the customer's phone is engaged. In this case, Syntelate XA would record the Dial call state (the attempt to call the customer) but *not* the Dialling state (since the customer's phone doesn't ring).
Ringing	The agent's phone rings (inbound call).
Talking	The agent talks with the customer.

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Call State	Description
Hold	The agent puts the customer on hold.
ConsultWaiting	Agent A initiates a consult and awaits connection to agent B.
Consult	Agent A is connected to agent B for a consult.
ConsultPassive	Agent B is put into a consult with agent A.
Conference	
ConferenceOwner	Agent A initiates a conference with agent B.
ConferencePassive	Agent B is put into a conference with agent A.
WrapUp	The call is put into wrap-up.

7.4.3 Chat

The following table describes the various call states used by chat.

Call State	Description
Client Chat Started	The customer starts a chat.
Agent Allocated Chat	The chat is allocated to an agent.
Agent First Message	The agent sends their first message.

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Call State	Description
Last Client Message	The customer sends their last message. For SMS and social media chats, this is not written if the customer only sends one message. Only logged at the end of the chat.
Last Agent Message	The agent sends their last message. For web chats, this includes auto-responses. Only logged at the end of the chat.
Client Ended Chat	The customer ends the chat (web chat only). Reporting continues until the agent ends the chat.
Agent Ended Chat	The agent ends the chat.
Chat	
Chat Transferred	The chat is transferred. For Agent B, this is followed by a change of call state to Agent Allocated Chat.
Client left a message	The customer leaves a message.

7.5 Reporting Tables

This topic describes the Syntelate XA database tables used for:

- Call Reporting on the next page
- Email Reporting on page 517
- Webchat Reporting on page 528

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As well as tables, this topic also describes Useful Functions on page 534 and Reporting Tables on the previous page that you may also find helpful for reporting.

> **Note:** In this topic, any words that are formatted in UPPERCASE refer to field names or table names. Items within single quotes refer to actual row values from one of the tables that the item depends on.

7.5.1 Call Reporting

All types of call use two reporting tables:

1. REPORTING_AGENT_BY_CHANNEL
2. REPORTING_CUSTOMER_BY_CHANNEL

Both tables depend on and aggregate data from the CALLSTATUSLOGGING and INTERACTION_1 tables.

A call, of any type, is identified by the CLIENTNO and you can use the CLIENTNO to examine customer call journeys. To examine agent call journeys, use the CALLLOGID.

> **Note:** The CLIENTNO and the LKTL_CLIENTNO from the CALLSTATUSLOGGING and INTERACTION_1 tables respectively are synonymous with each other. For tables with names like INTERACTION_X the 'X' represents an integer, usually 1 but not always; for example, INTERACTION_1 or INTERACTION_1_HISTORY.

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7.5.1.1 CALLSTATUSLOGGING

When reporting is enabled, Syntelate XA records every change of call state in the CALLSTATUSLOGGING table.

> **Note:** In reporting, we use the term **call state** when talking about chats and emails as well as voice calls.

The CALLSTATUSLOGGING table includes one record for each change of call state. It specifies all the captured information about the change of call state, such as the time that it happened and the interaction it relates to.

The following is a description of the columns of the CALLSTATUSLOGGING table.

Field	Description
CALLSTATID	A unique ID for the record.
CLIENTNO	References the interaction in the INTERACTION_X table. For the following call states, Syntelate XA records -1: » LoginWorkzone » LogoutWorkzone » Ready » PendingNotReady » NotReady For other call states that are not associated with a particular

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Field	Description
	record in the INTERACTION_X table, such as Ringing or Waiting, Syntelate XA records 0.
CALLLOGID	An ID shared by all call states for the same interaction and the same agent. A single call will therefore generate several records (for Dialling, Talking, and WrapUp, say), all with the same CALLLOGID but each with a unique CALLSTATID. A call involving agent consult, conference, or transfer will generate records with a CALLOGID for agent A and other records with a CALLLOGID for agent B. For chat records, this is always NULL (CALLLOGREF is used instead).
CPGNO	References the universe in the CAMPAIGNS table. For the following call states, Syntelate XA records 0: » Ready » PendingNotReady » NotReady For the following call states, Syntelate XA records null: » LoginWorkzone » LogoutWorkzone
CALLSTATE	The state into which the call was moved.

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Field	Description
LOCALISEDCALLSTATE	The state into which the call was moved (in the agent's language).
STATETIMEAGT	The date and time that the call entered the state (in the agent's time zone). For chat records, this is always NULL.
STATETIMEUTC	The date and time that the agent entered the state (in UTC).
USEDBYAGENT	The agent's username (references the AGENT table).
LOGAGENTNO	Not used by Syntelate XA.
CALLLOGREF	For voice calls, the unique reference number from the phone system. For chat records, the chat ID (shared by all call states that relate to the same chat). Otherwise NULL.
COMPLETECODE	The completion code (when the call state is Completed). This references the CODE field in the COMPLETION_CODES table.
CTI_USER	The CTI agent name.
STATEENDTIMEUTC	The date and time that the call left this state (in UTC).
TRANSFERTO	The number transferred to.
REASONCODE	For a call state of NotReady or PendingNotReady, the not ready reason code. For the initial NotReady state when an

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Field	Description
	agent logs in to a workzone, this field is blank. References the CTINOTREADYREASONS on page 215 table.

7.5.1.2 REPORTING_AGENT_BY_CHANNEL

This table aggregates agent data for all calls.

Note: The field JOBNAME is only relevant if you use Avaya POM.

Field	Format	Description
REPORTING_ID	INTEGER	Interval PK. Not required for reports.
UNIVERSE_ID	INTEGER	LKTL_CPG_NO.
TENNANT_ID	INTEGER	Not used.
CHANNEL	VARCHAR (20)	The type of call. From LKTL_WLMTYPE on INTERACTION_X.
CHANNELTYPE	VARCHAR (100)	Not used.
LKTL_CLIENTNO	INT	The identifier for the database. Unique to each interaction except callbacks, which are placed in the queue with the same identifier.

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Field	Format	Description
		From LKTL_CLIENTNO (PK) in INTERACTION_X table and effective FK on CALLSTATUSLOGGING and other INTERACTION tables.
CALLLOGID	INT	Represents a single agent call. CALLLOGID in CALLSTATUSLOGGING table.
HISTORY_ID	INT	Not used.
WORKZONE_ID	INT	The WORKZONE_ID from the CALLSTATUSLOGGING table.
CREATED	DATETIME	LKTL_CREATED from INTERACTION_X table for this LKTL_CLIENTNO.
CREATED_UTC	DATETIME	Adjusted from LKTL_CREATED on INTERACTION_X.
DAYDATE	DATE	Local date derived from LKTL_CREATED.
AGENTNAME	VARCHAR (100)	USEDBYAGENT on the CALLSTATUSLOGGING table. PK on the AGENT table where the actual name of the agent is stored.
AGENTSTART	DATETIME	Not used.
AGENTEND	DATETIME	Not used.

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Field	Format	Description
COMPLETE	INT	1 for complete, otherwise 0. From the latest LKTL_COMPLETE value on INTERACTION_X table.
AGENT_ COMPLETECODE	VARCHAR (10)	The completion code that the adviser has selected.
TRANSFERRED	INT	A call state of 'TRANSFERRED' exists for this CALLLOGID.

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Field	Format	Description
TIME_CONFERENCE	INT	Total time in this CALLSTATE in milliseconds. Note that some of these call states may either not be valid for particular call types or just may not be used.
TIME_CONSULT	INT	
TIME_CONSULT_ ACTIVE	INT	
TIME_CONSULT_ PASSIVE	INT	
TIME_CONSULT_ RECEIVER	INT	
TIME_DIAL	INT	
TIME_DIALLING	INT	
TIME_HOLD	INT	
TIME_PREVIEW	INT	
TIME_RINGING	INT	Total time in this CALLSTATE in milliseconds. Note that some of these call states may either not be valid for particular call types or just may not be used.
TIME_TALKING	INT	
TIME_WAITING	INT	
TIME_WRAPUP	INT	

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Field	Format	Description
TIME_TOTALHANDLE	INT	The sum of these columns: TIME_CONFERENCE TIME_HOLD TIME_PREVIEW TIME_DIALLING TIME_RINGING TIME_TALKING TIME_CONSULT TIME_WRAPUP
TIME_ AGGREGATESTATES	INT	The sum of these columns: TIME_TOTALHANDLE (see above) TIME_DIAL TIME_WAITING
TIME_ AGENTSTARTTOEND	INT	The time difference from the first instance to the last instance of a particular CLIENTNO, CALLLOGID and AGENTNAME.
DateTimeModified	DATETIME	The date and time the row was updated or inserted.

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Field	Format	Description
JOBNAME	VARCHAR (30)	LKTL_CTI from INTERACTION_X table.

7.5.1.3 REPORTING_CUSTOMER_BY_CHANNEL

This table aggregates customer data for all calls.

> **Note:** The field JOBNAME is only relevant if you use Avaya POM.

FIELD	FORMAT	DESCRIPTION
REPORTING_ID	INT	Interval PK. Not required for reports.
UNIVERSE_ID	INT	LKTL_CPG_NO.
CHANNEL	VARCHAR (20)	The type of call. From LKTL_WLMTYPE on INTERACTION_X.
LKTL_CLIENTNO	INT	The identifier for the database. Unique to each interaction except callbacks, which are placed in the queue with the same identifier. From LKTL_CLIENTNO (PK) in INTERACTION_X table and effective FK on CALLSTATUSLOGGING and other INTERACTION tables.

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FIELD	FORMAT	DESCRIPTION
WORKZONE_ID	INT	The WORKZONE_ID from the CALLSTATUSLOGGING table.
CREATED	DATETIME	LKTL_CREATED from INTERACTION_X table for this LKTL_CLIENTNO.
DAYDATE	DATE	Local date derived from LKTL_CREATED.
CUSTOMER_ STARTTIME_AGT		The earliest local start time of any of the following CALLSTATES: 'Talking', 'Transferred', 'Consult', 'Conference' or 'Hold'.
CUSTOMER_ ENDTIME_AGT		The latest local end time of any of the following CALLSTATES: 'Talking', 'Transferred', 'Consult', 'Conference' or 'Hold'.
FIRST_AGENTNAME		The agent whom the call started with.
LAST_AGENTNAME		The agent whom the call ended with.
COMPLETE		'1' if the LKTL_COMPLETED on INTERACTION_X = 'Y', otherwise '0'.
COMPLETE_CODE		The completion code that was selected by the last agent who handled the record.
NULL_ENDUTC	INT	'1' if an end time exists for a call state, otherwise '0'.
TRANSFERRED		The number of times the call was transferred.

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FIELD	FORMAT	DESCRIPTION
		Otherwise NULL.
TRANSFERRED_LAST_PHONENO		The last telephone number that a call was transferred to.
TIME_CONFERERENCE	INT	Total time in this CALLSTATE in milliseconds. Note that some of these call states may either not be valid for particular call types or just may not be used.
TIME_CONSULT	INT	
TIME_HOLD	INT	
TIME_TALKING	INT	
TIME_TRANSFER	INT	
TIME_TOTALCALLSTATES	INT	The sum of these columns: TIME_CONFERENCE TIME_CONSULT TIME_HOLD TIME_TALKING TIME_TRANSFER
TIME_TOTAL_CUSTOMER	INT	As above for TIME_TOTALCALLSTATES.
DATETIME_MODIFIED	DATETIME	The date and time the row was updated or

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FIELD	FORMAT	DESCRIPTION
		inserted.
JOBNAME	VARCHAR (30)	LKTL_CTI from INTERACTION_X table.

7.5.2 Email Reporting

Email reporting uses two tables:

1. REPORTING_EMAIL_AGENT_DETAIL
2. REPORTING_EMAIL_CUSTOMER_DETAIL

7.5.2.1 REPORTING_EMAIL_AGENT_DETAIL

This table provides the data that's displayed on the report called Email - Agent Experience.

Field	Format	Description
UNIQUEMESSAGE_ID	UNIQUEIDENTIFIER	UNIQUEMESSAGE_ID in INTERACTION_X_MESSAGE.
MAILBOX	INT	IMMAILBOXNO (PK) in IMMAILBOXNO.
CLIENTNO	INT	LKTL_CLIENTNO (PK) in INTERACTION_X table. Also used as effective FK by

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Field	Format	Description
		CALLSTATUSLOGGING and other INTERACTION tables.
CALLLOGID	INT	Relates to CALLLOGID in CALLSTATUSLOGGING table and INTERACTION_X_HISTORY table.
CALLSTATID	INT	PK on CALLSTATUSLOGGING table.
EMAIL_DIRECTION_ REPORT	VARCHAR(1)	'I' for 'Inbound', 'O' for Outbound.
USEDBYAGENT	VARCHAR(100)	The agent that dealt with the email. Joins to the AGENTNAME on the AGENT table.
NAMEOFAGENT	VARCHAR(100)	The name of the agent in the AGENT table. Included to remove need for a join on AGENT table.
DAYDATE	DATETIME	The date that the email was presented to the agent.
UTC_OFFSET	INT	The offset in hours between STATETIMEAGT and STATETIMEUTC in CALLSTATUSLOGGING.

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Field	Format	Description
STATETIMEAGT	DATETIME	Local date and time the email was presented.
STATEENDTIMEAGT	DATETIME	Local date and time the email ended.
STATEENDTIME_IN_DAY	INT	'1' if the STATEENDTIMEAGT and STATETIMEAGT are on the same day.
EMAIL_DURATION_MS	INT	Time between the STATEENDTIMEAGT and STATETIMEAGT in milliseconds. Check is in place for overflow.
COMPLETED_CALLSTATID	INT	The CALLSTATID on the CALLSTATUSLOGGING table where a 'Completed' CALLSTATE was found for this CLIENTNO and CALLLOGID.
COMPLETED_CODE	VARCHAR(50)	Either the COMPLETE_CODE from the email or a calculated value for exceptions.
EMAIL_COMPLETE	INT	'1' if COMPLETED on the CALLSTATUSLOGGING = 'Y'. Forwarded emails can be counted

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Field	Format	Description
		as completed if the parameter @CountForwardAsComplete = '1' in the stored procedure SP_ Populate_REPORTING_EMAIL_ CUSTOMER_DETAIL.
EMAIL_SENT	INT	'1' if 'EMSENT' complete code on the CALLSTATUSLOGGING table. Does not differentiate between unsolicited, reply or forwarded.
EMAIL_ANSWERED	INT	'1' if the email has been answered. An email is considered answered if it has a reply email, or if a completion code of Spam or No Reply Required is found.
EMAIL_TRANSFERRED	INT	'1' if the email indicates it has been transferred.
EMAIL_PARKED	INT	'1' if the email has been parked for a predetermined amount of time.
EMAIL_SPAM	INT	'1' if the email is marked as spam.
EMAIL_ NOREPLYREQUIRED	INT	'1' if the email is marked as no reply required.

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Field	Format	Description
EMAIL_CANCELLED	INT	'1' if the email has been cancelled. This is an unsolicited email which has been closed with no change or parked.
EMAIL_ESCALATED	INT	'1' if the email has been escalated.
EMAIL_ CLOSEDNOCHANGE	INT	'1' if an inbound email has been returned to the queue using the 'Close No Change' button.
EMAIL_INPROGRESS	INT	'1' if an email has no end time for that CALLLOGID.
EMAIL_ SYSTEMENDEMAIL	INT	'1' if it has no 'Completed' call state for that CALLLOGID but has an end time populated by a subsequent CALLSTATE.
EMAIL_UNSOLICITED	INT	'1' if the agent has raised an outbound email outwith an inbound email.
REPLY_EMAILFOUND	INT	'1' if original email address is found in a sent email.
FORWARD_ EMAILFOUND	INT	'1' if any email addresses other than the original one are found in a sent email.

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Field	Format	Description
NEWMESSAGE_ EMAILFOUND	INT	'1' if an email with this CLIENTNO exists on the INTERACTION_X_ NEWMESSAGE table. It should only appear if the report updating overlaps a sent email before the server sends it. The row is re-evaluated on the next report run if this is '1'.
AUDIT_NOTE	VARCHAR(50)	Usually NULL. Otherwise, a small system-populated note with comments around to help track email outcomes.
MODIFIED_DATETIME	DATETIME	The date and time the record was updated or inserted.

7.5.2.2 REPORTING_EMAIL_CUSTOMER_DETAIL

This table provides the data that's displayed on the report called Email - Customer Experience.

Field	Format	Description
CUSTOMER_REPORT_ID	UNIQUEIDENTIFIER	PK. Not required for reports.
HISTORY_NO	INT	LKTL_HISTORYNO (PK) in INTERACTION_X_HISTORY table.

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Field	Format	Description
MESSAGE_NO	INT	LKTL_MESSAGENO (PK) in INTERACTION_X_MESSAGE table.
UNIQUEMESSAGE_ID	UNIQUEIDENTIFIER	UNIQUEMESSAGE_ID in INTERACTION_X_MESSAGE table.
MAILBOX_NO	INT	IMMAILBOXNO (PK) in IMMAILBOXNO.
CREATED_DATETIME	DATETIME	The date and time the email arrived in the INTERACTION_X_MESSAGE table.
CREATED_DATE	DATETIME	The date the email arrived in the INTERACTION_X_MESSAGE table.
CLIENTNO	INT	LKTL_CLIENTNO (PK) in INTERACTION_X table. Also used as effective FK by CALLSTATUSLOGGING and other INTERACTION tables. Can appear on multiple rows where the client has subsequently replied to a previously completed email.

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Field	Format	Description
CALLLOGID	INT	Relates to CALLLOGID in CALLSTATUSLOGGING table and INTERACTION_X_ HISTORY table.
CUSTOMERINBOUNDEMAILS_COUNT	INT	The total emails on the same subject a customer has sent in up to and including the one presented to the agent.
COMPLETECODE	VARCHAR(10)	The current code that the agent/supervisor has used when dealing with the email.
COMPLETED	INT	'1' if the email has a completed status, otherwise '0'.
EMAIL_TYPE	VARCHAR(1)	'I' for inbound or 'O' for outbound.
EMAIL_OUTBOUNDTYPE	VARCHAR(1)	Should always be 'N' if EMAIL_ TYPE is 'O', otherwise 'NULL'.
UNSOLICITED	INT	'1' if EMAIL_OUTBOUNDTYPE is 'N', otherwise '0'.
REPLY	INT	CUSTOMERINBOUNDEMAILS_COUNT if one or more replies have been found for this

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Field	Format	Description
		CLIENTNO and CALLLOGID.
FORWARD	INT	CUSTOMERINBOUNDEMAILS_COUNT if one or more emails marked as FORWARD have been found for this CLIENTNO and CALLLOGID.
ANSWERED	INT	CUSTOMERINBOUNDEMAILS_COUNT if one or more REPLY, SPAM, or NO REPLY REQUIRED emails have been found for this CLIENTNO and CALLLOGID.
TRANSFERRED	INT	CUSTOMERINBOUNDEMAILS_COUNT if one or more emails marked as TRANSFERRED have been found for this CLIENTNO and CALLLOGID.
ESCALATED	INT	CUSTOMERINBOUNDEMAILS_COUNT if one or more emails marked as ESCALATED have been found for this CLIENTNO and CALLLOGID.
PAUSED	INT	CUSTOMERINBOUNDEMAIL

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Field	Format	Description
		S_COUNT if the email is currently parked.
SPAM	INT	CUSTOMERINBOUNDEMAILS_COUNT if one or more emails marked as SPAM have been found for this CLIENTNO and CALLLOGID.
NOREPLYREQUIRED	INT	CUSTOMERINBOUNDEMAILS_COUNT if one or more No Reply Required have been found for this CLIENTNO and CALLLOGID.
FORWARD_EMAIL_FOUND	INT	CUSTOMERINBOUNDEMAILS_COUNT if any email addresses other than the original one are found in a sent email.
REPLY_EMAIL_FOUND	INT	CUSTOMERINBOUNDEMAILS_COUNT if original email address is found in a sent email.
LOCKEDBY	VARCHAR(100)	If this is not 'NULL' then record is currently locked by this agent. In normal circumstances this means the email is in progress.

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Field	Format	Description
COMPLETED_DATETIME	DATETIME	The first instance of a complete flag being set for this CLIENTNO and CALLLOGID.
WORKING_SLA_TIME_SECS	INT	The seconds in working hours allowed for an answered email. Calculated from the value set in IMMAILBOX for this MAILBOX_NO.
WORKING_RESPONSE_TIME_SECS	INT	The working seconds until an answered email.
IN_WORKING_SLA_TIME	INT	CUSTOMERINBOUNDEMAILS_COUNT if WORKING_RESPONSE_TIME_SECS <= WORKING_SLA_TIME_SECS.
TOTAL_SLA_TIME_SECS	INT	The seconds overall allowed for an answered email. Calculated from the value set in IMMAILBOX for this MAILBOX_NO.
TOTAL_RESPONSE_TIME_SECS	INT	The overall time until the email is answered.
IN_TOTAL_SLA_TIME	INT	CUSTOMERINBOUNDEMAILS_COUNT if TOTAL_

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Field	Format	Description
		RESPONSE_TIME_SECS <= TOTAL_SLA_TIME_SECS.
SUPERVISOR_DEALT_WITH	INT	'1' if a supervisor has opened the email prior to it being sent to an agent and assigned a COMPLETE_CODE. Otherwise '0'.
DATETIME_MODIFIED	DATETIME	The date and time the record was updated or inserted.

7.5.3 Webchat Reporting

Webchat reporting uses three tables:

1. WEBCHATAGENTREPORTING
2. REPORTINGAGENTOVERVIEW
3. WEBCHATCUSTOMERREPORTING

Each table depends on various other tables, which are explained in the descriptions below.

As with calls, a chat, of any type, is identified by the CLIENTNO and you can use the CLIENTNO to examine customer chat journeys. To examine agent chat journeys, use the CALLLOGID.

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7.5.3.1 WEBCHATAGENTREPORTING

Field	Format	Description
REPORTING_ID	INT	Interval PK. Not required for reports.
LKTL_CLIENTNO	INT	The identifier for the database. Unique to each interaction except Call Backs which are placed in the queue with the same identifier. From LKTL_CLIENTNO (PK) in INTERACTION_X table and effective FK on CALLSTATUSLOGGING and other INTERACTION tables.
HISTORY_ID	INT	PK from INTERACTION_X_HISTORY table.
CREATED	DATETIME	LKTL_CREATED from INTERACTION_X _ HISTORY table for this LKTL_CLIENTNO.
AGENTNAME	VARCHAR (30)	USEDBYAGENT on the CALLSTATUSLOGGING table. PK on the AGENT table where the actual name of the agent is stored.
AGENTSTART	DATETIME	The time the agent is first allocated the chat.
AGENTEND	DATETIME	The time the agent ends or transfers the chat
TRANSFERRED	INT	'1' if a ‘Chat Transferred’ CALLSTATE exists

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Field	Format	Description
		for this agent and CLIENTNO, otherwise '0'.
TRANSFERREDOUT	INT	'1' if the ENDTOPIC and STARTTOPIC are not equal, Otherwise '0'. (See below for these two fields.)
COMPLETE	INT	'1' if the LKTL_COMPLETED on the INTERACTION_X_HISTORY table = 'Y', otherwise '0'.
AGENT_ COMPLETECODE	VARCHAR (100)	The LKTL_COMPLETECODE selected by the initial agent who handled the chat.
FINAL_ COMPLETECODE	VARCHAR (100)	The LKTL_COMPLETECODE selected by the final agent who handed the chat.
STARTTOPIC	INT	The IMMAILBOXNO that the Chat started in.
ENDTOPIC	INT	The IMMAILBOXNO that the Chat ended in.
RESPONSETIME	INT	The average time (seconds) to for the agent to respond to this message.
TOTALCHATTIME	INT	Time (seconds) between AGENTSTART and AGENTEND.
WRAPTIME	INT	'0' if the agent ends the chat before the client. Otherwise, the time (seconds) between the client ending the chat and the agent ending

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Field	Format	Description
		the chat.
WRAPPED	INT	'1' if WRAPTIME > 0, otherwise '0'.

7.5.3.2 REPORTINGAGENTOVERVIEW

The REPORTINGAGENTOVERVIEW table aggregates key agent data by day.

It depends on the tables:

1. CALLSTATUSLOGGING
2. CTINOTREADYREASONS

Field	Format	Description
REPORTING_ID	INT	Interval PK. Not required for reports.
AGENTNAME	VARCHAR (30)	USEDBYAGENT on the CALLSTATUSLOGGING table. PK on the AGENT table where the actual name of the agent is stored.
WORKZONE	INT	WORKZONE_ID from the CALLSTATUSLOGGING table.
STATUSDATE	DATETIME	The date that the following four fields are aggregated over.
LOGGEDIN_ SECS	INT	The sum of time differences between CALLSTATES of ‘Login WorkZone’ and ‘LogoutWorkZone’.

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Field	Format	Description
NOTREADY_ SECS	INT	The sum of all ‘NotReady’ time segments.
NOTREADY_ BREAKS_SECS	INT	The sum of all ‘NotReady’ time segments. Where the BREAK_FLG is 1 on the CTINOTREADYREASONS table.
CHATTIME	INT	The sum of all ‘Chat’ time segments.

7.5.3.3 WEBCHATCUSTOMERREPORTING

The WEBCHATCUSTOMERREPORTING table aggregates customer data for chats.

It depends on the tables:

1. CALLSTATUSLOGGING
2. INTERACTION_X
3. INTERACTION_X_MESSAGE

Field	Format	Description
REPORTING_ID	INT	Interval PK. Not required for reports.
LKTL_CLIENTNO	INT	The identifier for the database. Unique to each interaction except Callbacks which are placed in the queue with the same identifier. From LKTL_CLIENTNO (PK) in INTERACTION_X table and effective FK on

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Field	Format	Description
		CALLSTATUSLOGGING and other INTERACTION tables.
CREATED	DATETIME	The date and time the row was added to the database.
ABANDONED	INT	'1' if the chat was abandoned, otherwise '0'.
ALLOCATED	INT	LKTL_CREATED from INTERACTION_X _ HISTORY table for this LKTL_CLIENTNO.
TRANSFERS	INT	
AGENTSTART	DATETIME	The time of the first instance of CALLSTATE 'Agent Allocated Chat' for this CLIENTNO.
AGENTEND	DATETIME	The time of the last instance of CALLSTATE 'Agent Ended Chat' for this CLIENTNO.
LKTL_ COMPLETECODE	VARCHAR (100)	
STARTTOPIC	INT	The IMMAILBOXNO that the Chat started in.
ENDTOPIC	INT	The IMMAILBOXNO that the Chat ended in.
WAITTIME_INITIAL	INT	The time (seconds) from the customer starting a chat until it is assigned to an agent.
WAITTIME_TRANSFER	INT	The total time (seconds) that a customer

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Field	Format	Description
		waited for a chat to be transferred to another agent.
RESPONSETIME	INT	The average time (seconds) for agent(s) to reply to a message.
TOTALCHATTIME	INT	Time (seconds) between AGENTSTART and AGENTEND.
COMPLETED	INT	'1' if an LKTL_COMPLETED = 'Y' on INTERACTION_X for this Client. Otherwise '0'.
WAITTIME_ ABANDONED	INT	Time (seconds) between a customer starting a chat and ending it before it can be allocated to an agent.
TRANSFERRED	INT	'1' if a 'Chat Transferred' CALLSTATE exists for this agent and CLIENTNO, otherwise '0'.
TRANSFERREDOUT	INT	'1' if the transfer was to a different IMMMAILBOXNO, otherwise '0'.

7.5.4 Useful Functions

The following two functions are used frequently to take a lot of the complexity out of presenting formatted dates, groups of dates or times.

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7.5.4.1 FN_SecondsToHHMMSS

This is a scalar function that takes a float value in seconds, then rounds it to the nearest second and converts it into a string in the form of hours, minutes and seconds.

`dbo.FN_SecondsToHHMMSS(@Seconds AS FLOAT) Returns VARCHAR(13)`

Maximum value is '999999:59:59' from a @Second value of 35999999999.0

> **Note:** Although the date is recorded as a string in SQL, it is recognised by Excel as a valid time.

EXAMPLE

```
DECLARE @Sec FLOAT = 10000.265
SELECT TimeValue = dbo.FN_SecondsToHHMMSS(@Sec)
```

Returns 2:46:40.

7.5.4.2 fnt_GET_TIME_INTERVALS

`fnt_GET_TIME_INTERVALS` is a table function. It returns a table that allows grouping of dates over time intervals of 30 minutes, hour, day, week or month, between two dates inclusively.

> **Note:** For the current version, week intervals are hardcoded to start on a Sunday.

This is the function:

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```
dbo.fnt_GET_TIME_INTERVALS (   @StartDate    DATETIME
, @EndDate     DATETIME
, @Interval    INT
, @WorkingHours BIT = 0 )
```

@StartDate and @EndDate are self-evident and generally input as dates but you can pick an actual date and time if @Interval is 1 or 2.
@Interval is a value from 1 to 5 representing 30 minutes, 1 hour, 1 day, 1 week and 1 month respectively.
@WorkingHours is either 0 for all times in a day or 1 for working hours which are taken from table Config_WorkingHours.

This function generally uses a join directly to determine the interval a record belongs to or you can read the function into a temp table before the join.

This function returns a table value of:

```
(   Interval_Id   INT IDENTITY(1,1) NOT NULL
Interval     INT             NOT NULL
IntervalStart DATETIME        NOT NULL
IntervalEnd   DATETIME        NOT NULL
IntervalLabel VARCHAR(100)     NOT NULL
AvgRequired   INT             NOT NULL )
```

EXAMPLE

To return a table between the start date and end date with the interval being one week:

```
 DECLARE @Start    DATETIME = '20191112'
@End     DATETIME = '20191127'
```

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```
@Interval INT     = 4
@wrkHrs   BIT     = 0
SELECT * INTO #DateRange FROM dbo.fnt_GET_TIME_INTERVALS
(@Start,@End,@Interval,@WrkHrs)
```

Interval_Id	Interval	IntervalStart	IntervalEnd	IntervalLabel	AvgRequired
1	4	2019-11-12 00:00:00.000	2019-11-16 00:00:00.000	Tue 12-Nov-Sat 16-Nov-19	5
2	4	2019-11-17 00:00:00.000	2019-11-23 00:00:00.000	Sun 17-Nov-Sat 23-Nov-19	7
3	4	2019-11-24 00:00:00.000	2019-11-27 00:00:00.000	Sun 24-Nov-Wed 27-Nov-19	4

From this table the IntervalStart and IntervalEnd can be used to determine which group a particular record should be in. Note that the interval labels in this instance only show a full week for the second row. The AverageRequired illustrates that dates can return parts of weeks (or months).

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8. Salesforce

This document describes how to configure Syntelate XA to connect to Salesforce. Syntelate XA has a built-in web API for Salesforce. To use your Salesforce data in Syntelate XA, you need to:

1. Edit the settings of the Syntelate XA web API for Salesforce.
2. Edit your Syntelate XA universe.
3. Edit your Syntelate XA Agent Desktop.

You edit the web API's configuration settings so that it connects to your Salesforce API. When you have established the connection between the two APIs, you need to configure your Syntelate XA universe so that it knows which database tables and fields in Salesforce to retrieve data from and write data to. And when you've completed that task, you need to edit your Syntelate XA Agent Desktop so that agents can see and edit data in Salesforce.

8.1 Agent Experience

When agents are handling a customer interaction on their Syntelate XA Agent Desktop, they will see any customer data that exists in Salesforce and which you have configured access to in your Syntelate XA Universe.

If no customer data exists for that customer yet, the agent can capture details using the agent desktop, which will save the data to your Salesforce database.

In other words, the Syntelate XA Agent Desktop acts as an interface between an agent and your Salesforce instance.

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8.2 Supervisor Experience

Supervisors and system administrators can use Designer to specify which database tables and fields in Salesforce should be displayed on the agent desktop.

8.3 Prerequisites

Before you get started, you need to have the following:

- A Syntelate XA Designer account.
- A Salesforce API account. From there, you need to get the following details:
  - The absolute URL of your Salesforce instance.
  - Salesforce Client ID.
  - Salesforce Client Secret.

You need those details when you're configuring Syntelate XA to connect to your Salesforce instance. If you need assistance finding those API details, we recommend you refer to the Salesforce REST API Developer Guide.

8.4 What Next?

Your first step is to follow the instructions given in Configuring the Web API on the next page.

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8.5 Configuring the Web API

The Salesforce Web API in Syntelate XA is controlled by configuration settings. You need to edit some of those settings to create a connection between Syntelate XA and your Salesforce instance.

Follow the instructions below.

8.5.1 AppSettings Group

1. In your preferred Windows file system viewer, such as Explorer, open your Syntelate XA file directory.
2. Navigate to the Salesforce subdirectory. You see a WebAPI subdirectory.
3. Enter the WebAPI subdirectory.
4. Find and open the file named Web.config, using a text editor such as Notepad.
5. Find the <appSettings> group. It defines a number of configuration keys.
6. Edit the values of the following keys:

```
<add key="InstanceURI" value="" /> <!-- The absolute URL to your Salesforce
instance. -->
```

```
<add key="SalesforceCannotUpdateFields" value="contact.NAME" /> <!-- The
table fields in Salesforce that must not be updated by Syntelate XA. -->
```

```
<add key="PicklistUpdateJobStartTime" value="08:55" /> <!-- Specify the time
when you need Salesforce to run the Update Picklists job. -->
```

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```
<add key="PicklistUpdateJobRefreshTimerSeconds" value="864000" /> <!--
Specify how frequently you want Salesforce to run the Update Picklist job.
For example, 864000 seconds is 24 hours. -->
```

8.5.2 ConnectionStrings Group

1. Find the group <connectionStrings>.
2. Edit as shown:

```
<connectionStrings>

    <add name="synXaDatabase" connectionString="Data
Source=YourDatabaseServerName;User
ID=UsernameForAccessingYourDatabaseServer;Initial
Catalog=NameOfYourSyntelateXADatabase;Password=PasswordForYourDatabaseServer"
providerName="System.Data.SqlClient" />

    <!-- edit the connectionString value according to your Syntelate XA
server and database details. -->

</connectionStrings>
```

3. Save and close Web.config.

You have completed the configuration of the Salesforce Web API in your Syntelate XA instance.

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8.5.3 What Next?

You need to edit your Syntelate XA universe. Follow the instructions at Configuring the Universe below.

8.6 Configuring the Universe

In your Syntelate XA universe, you need to specify which database tables and fields in Salesforce are required for use in Syntelate XA. Follow the instructions below.

8.6.1 Add a Data Source

1. Go to Universe Builder and open the universe that is being used by your Syntelate XA agent desktop. You see the universe's configuration screen.
2. Add a new data source. You see the **Add Data Source** dialog.
3. For **Data source type**, choose Salesforce API.
4. For **Data source name**, enter Salesforce.
5. For **Connection string**, enter the absolute URL of your Salesforce Web API within your Syntelate XA instance.
6. **SAVE AND CLOSE**.

You return to the Universe configuration screen.

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8.6.2 Add a Data Source Object

1. Add a new data source object. You see the **Add Data Source Object** dialog.
2. For **Data Source**, choose Salesforce.
3. For **Description**, enter something that defines what this data source object will be used for, such as Salesforce Contacts if the object will be used to display and edit customer contact details.
4. **SAVE AND CONTINUE**. You see the **Edit Data Source Object** dialog.
5. For **Data source object type**, in most cases you will need either Parent, Grid or Interaction table. Only choose Grid stored procedure or Linked table if you know for certain that's what you need.
6. For **Data source object name**, choose the table that corresponds to the category of data that you're wanting this data source object to pull from Salesforce. For example, if you want to retrieve customer contact details, then you would choose the table that stores those details.
7. **Primary key**: This is automatically populated after you specify the **Data source object name**.
8. **Use as search query?** Lets you create a search table from the Salesforce data source object. (The search table will be a view.) As a result, agents will be able to search Salesforce data from their Syntelate XA Agent Desktop.

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> **Note:** When **Use as search query?** is **Yes**, the asterisk wildcard is appended to search terms. For example, if an agent searches for Ann, the search will look for Ann*.

9. **Select query string** lets you write a SOQL (Salesforce Object Query Language) select statement to retrieve data from the Salesforce database table that you specified in Data source object name. To provide a SOQL select statement, in Select query string, write or paste the SOQL statement.

> **Tip:** You should use this option if you need to display data from linked objects or you want to order the data. For example, to order sales orders by create date.

10. If you do not need to use SOQL queries, you can choose fields from the list provided. From **Required fields**, select each field you want to include in the data source object.

> **Tip:** If you are entering a SOQL query, you should also use the list of fields if you want to create picklists for them (in other words, to create Salesforce code tables).

> **Note:** The type lists SOQL data types, not SQL data types.

11. **SAVE AND CLOSE**.

Saving your Salesforce data source object results in the following events:

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- A view is created in the Syntelate XA database.
- Code tables are created for any selected fields that are of the type picklist.
- Field properties are added to the code tables.
- The code tables are populated.

Your data source object is ready for use.



Names of Salesforce views in Syntelate XA follow a convention to ensure your data source object is unique. The convention is SFNN_ DATASOURCEOBJECTNAME, where:

- SF: the view is of a Salesforce data source object.
- NN: the number of your universe.
- DATASOURCEOBJECTNAME: the name you created for the data source object. For search views, the name will be automatically prefixed by SEARCH.

8.6.3 What Next?

When you have created the data source objects that your Salesforce project requires, you need to configure the Syntelate XA Agent Desktop to ensure agents will be able to view and edit the data in Salesforce. This will involve configuring:

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- Data entry elements that display information from Salesforce, such as text boxes that display customer details.
- Grids that display records from Salesforce, such as a list of a customer's orders.
- Grids that agents can search, for example, to look for a customer's address.

Refer to the document, *Syntelate XA - Designer* for guidance.

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9. 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.

9.1 Fulfilment Server

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

9.1.1 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.

E X A M P L E

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).

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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.

9.1.2 Editing Fulfilments

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

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9.1.3 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.

9.1.4 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.

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Name	Syntax	Description
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 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.

9.1.5 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.

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Function	Description
@[fieldname]	Returns the value of the specified field in the record returned by the SQL Select statement.

9.1.6 Tasks

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

9.1.7 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.

9.1.7.1 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 556
- Managing Fulfilment Actions on the next page
- Managing Fulfilment Emails on page 554

9.1.8 Deleting a Fulfilment

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

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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**.

9.1.9 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.

9.1.9.1 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.

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> **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 549.
>
> 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  .

9.1.9.2 Editing a Fulfilment Action

To edit a fulfilment action, follow these steps:

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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.

9.1.9.3 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**.

9.1.10 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.

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Note: For Syntelate XA to send automated emails, you must set up an SMTP Configuration on page 672.

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.

9.1.10.1 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  .

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9.1.10.2 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  .

9.1.10.3 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**.

9.1.11 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.

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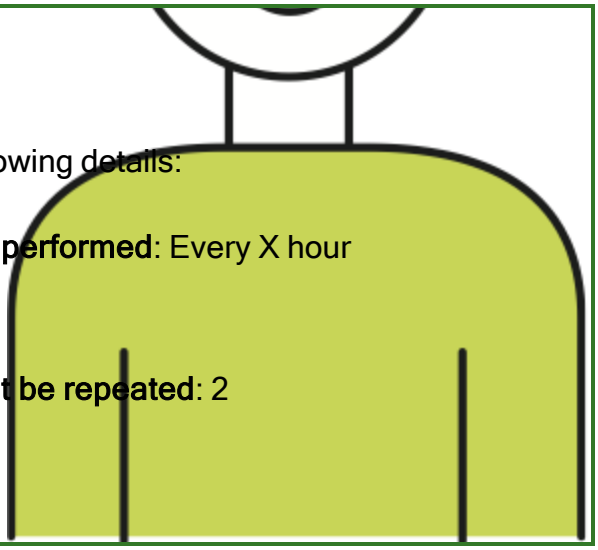
3. *(Optional)* In the **Fulfilment name** box, type a more meaningful name for your fulfilment.

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.

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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 549.
>
> 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  .

9.2 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.

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EXAMPLE

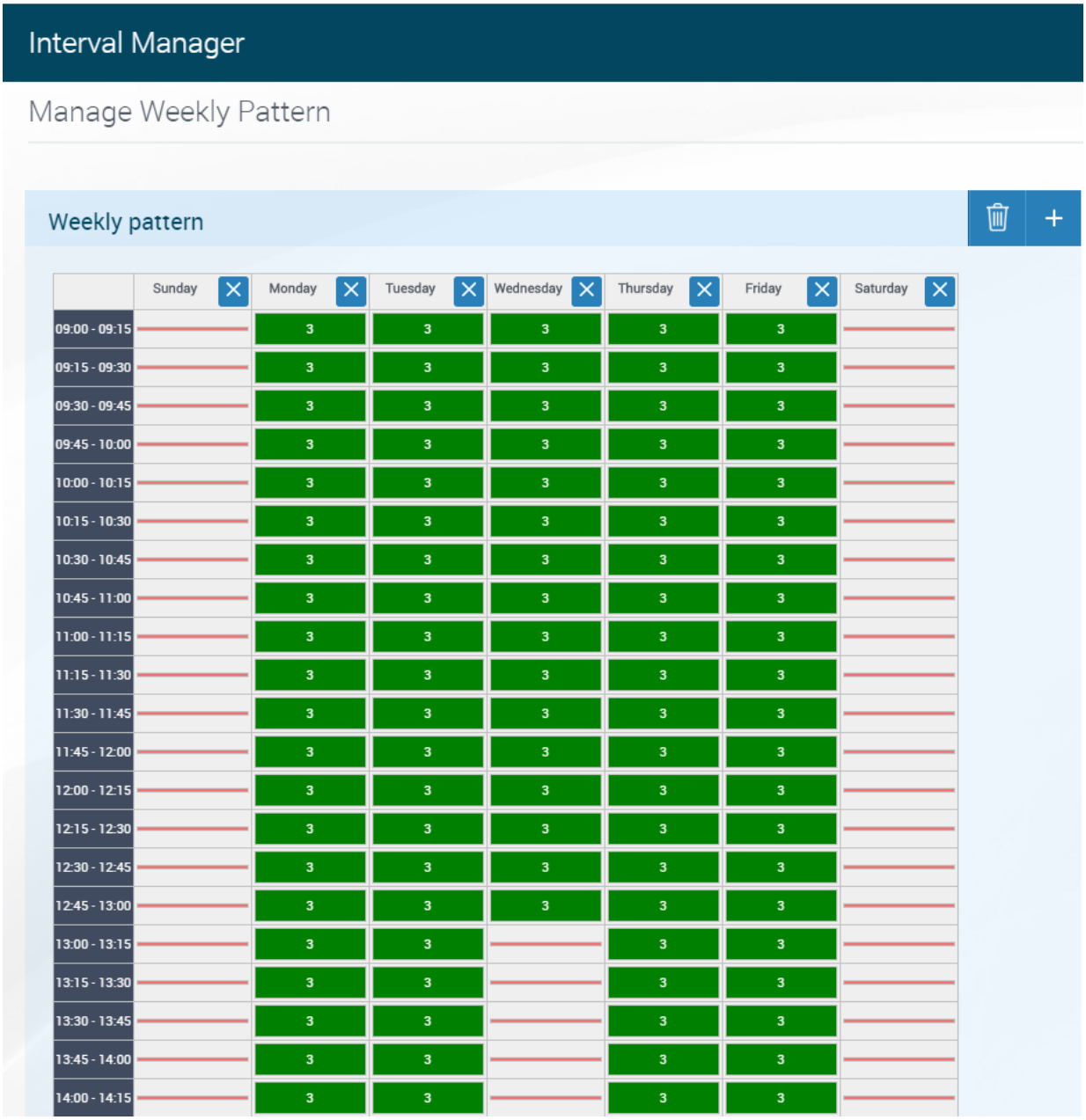
Inisoft Travel created a booking system using **Interval Manager** to help the business manage callbacks effectively. The system is embedded into their website to provide a self-service facility for customers. Meanwhile, Inisoft Travel agents also have access to the system, from their desktop and the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

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9.2.1 Concepts



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

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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).

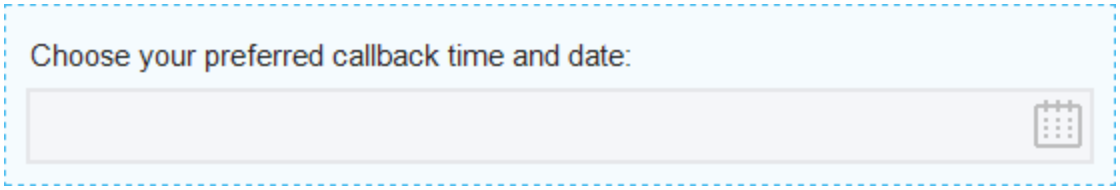
An interval group can be assigned to a workzone and to a specific date box with intervals control. While working on an interaction record, this allows agents to use a date box with intervals control to book a task to an interval, such as a callback.

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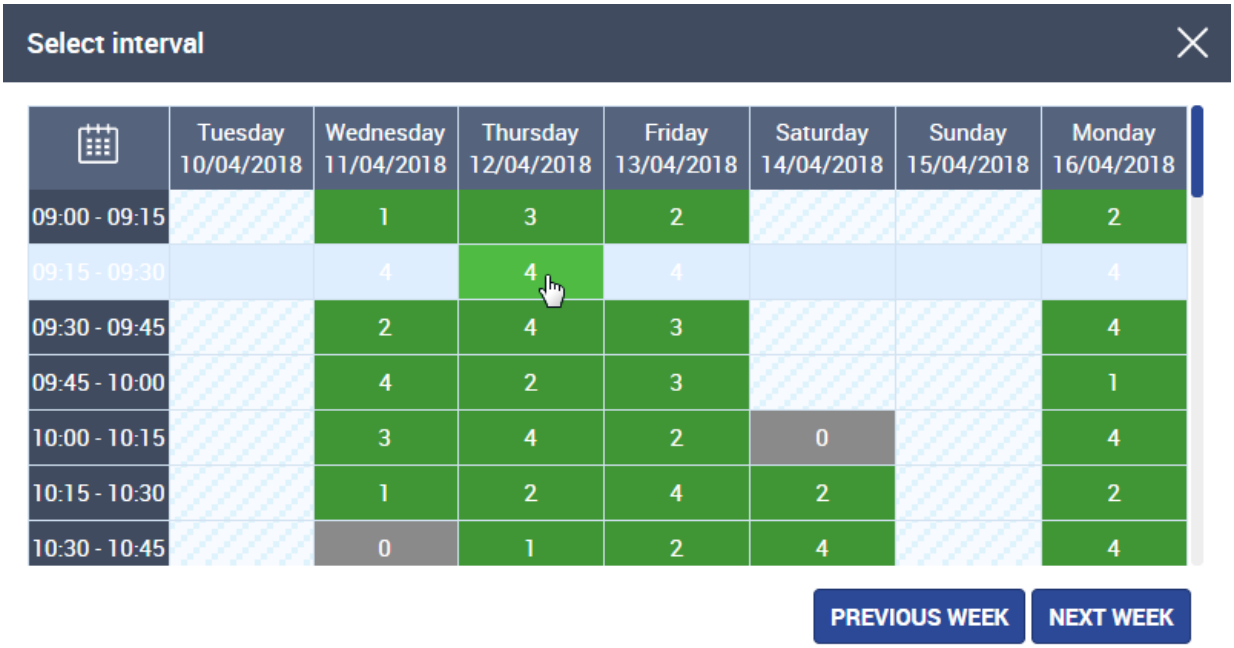
9.2.1.1 Self-service booking system

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.

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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.

9.2.2 Tasks

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

9.2.3 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.

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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**.

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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.

9.2.3.1 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 571
- Managing Overrides on page 567
- Managing Holidays below

9.2.4 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 567.

9.2.4.1 Adding a Holiday

To add a holiday, follow these steps:

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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  .

9.2.4.2 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  .

9.2.4.3 Deleting a Holiday

To delete an individual holiday date, follow these steps:

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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**.

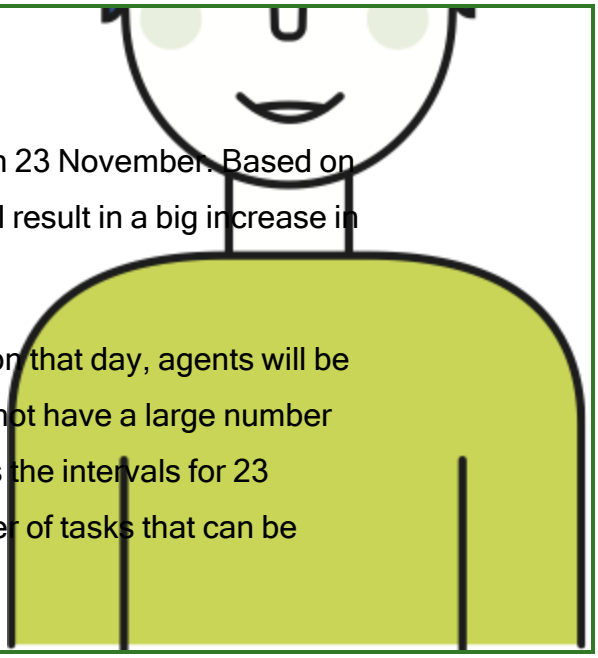
9.2.5 Managing Overrides

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.

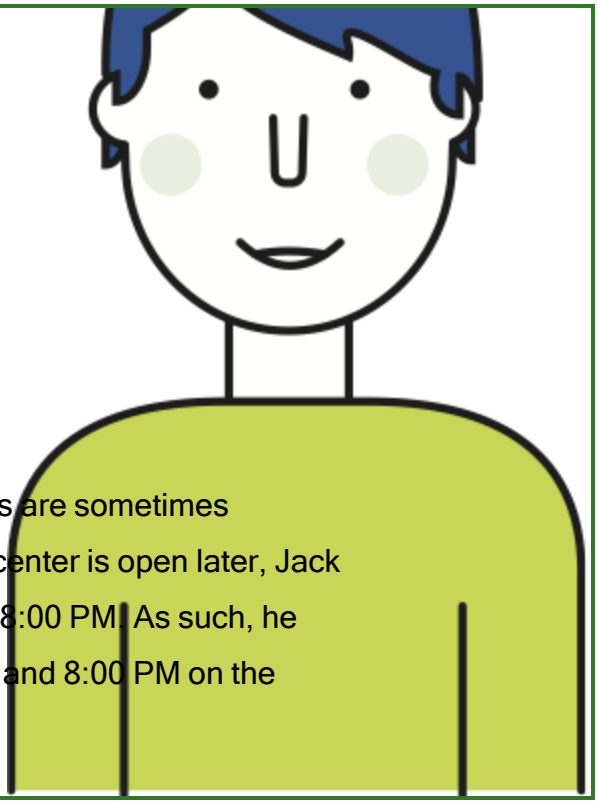
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EXAMPLE

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.

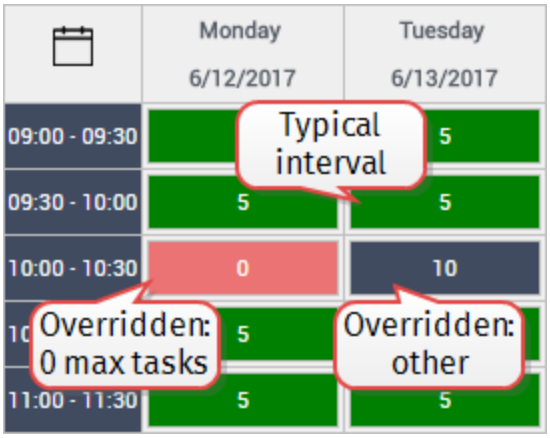


9.2.5.1 Interval Colors

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

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

9.2.5.2 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.

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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.

9.2.5.3 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.

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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.

9.2.6 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

9.2.6.1 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:

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

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

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

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> **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  .

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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

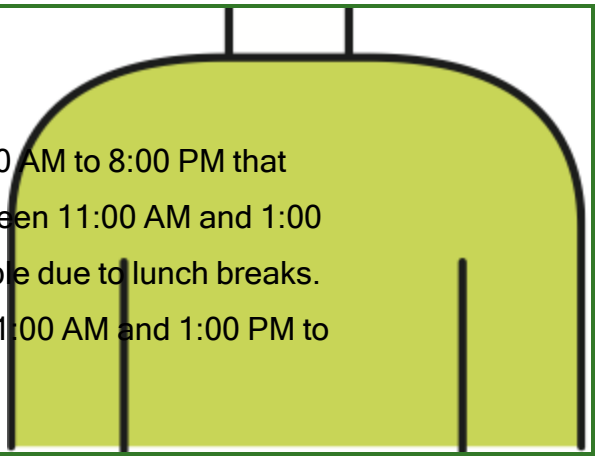
You could configure these patterns to allow a different number of tasks per interval and so on. For example, you could allow fewer tasks in the evening because you usually have fewer agents working then.

9.2.6.2 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 567.

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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  .

9.2.6.3 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.

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3. Click  for the weekday whose pattern you want to delete. A dialog box appears, asking you to confirm the deletion.
4. Click **DELETE**.

9.2.6.4 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**.

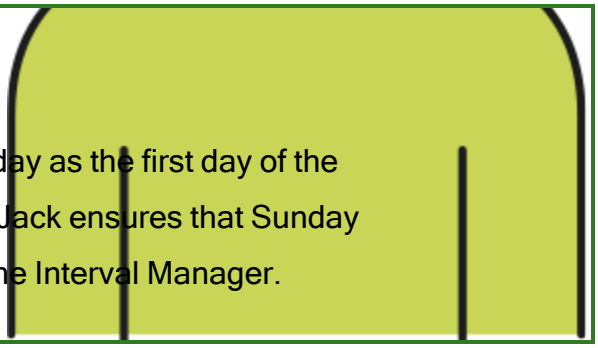
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9.2.7 Managing Weekdays

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.

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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.

9.3 Introduction to Studio

This section provides an introduction to Syntelate Studio.

9.3.1 Tiles

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

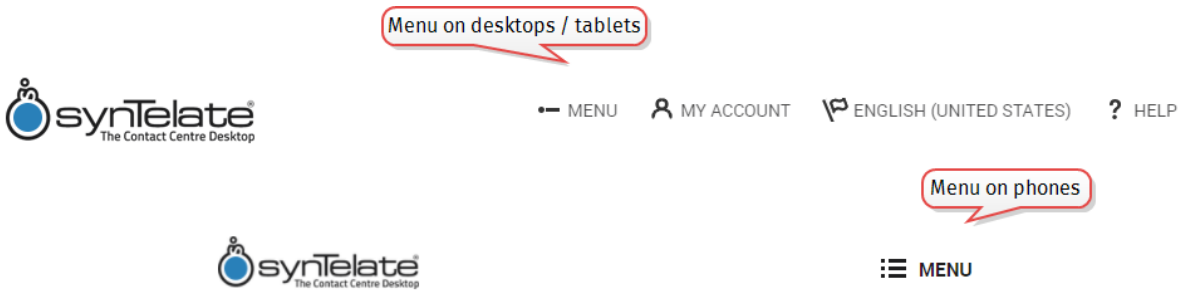
The tiles that you can access, and whether you have full access or read only access to these, depends on the **roles** that you have been granted and how your **tile security** has been configured.

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

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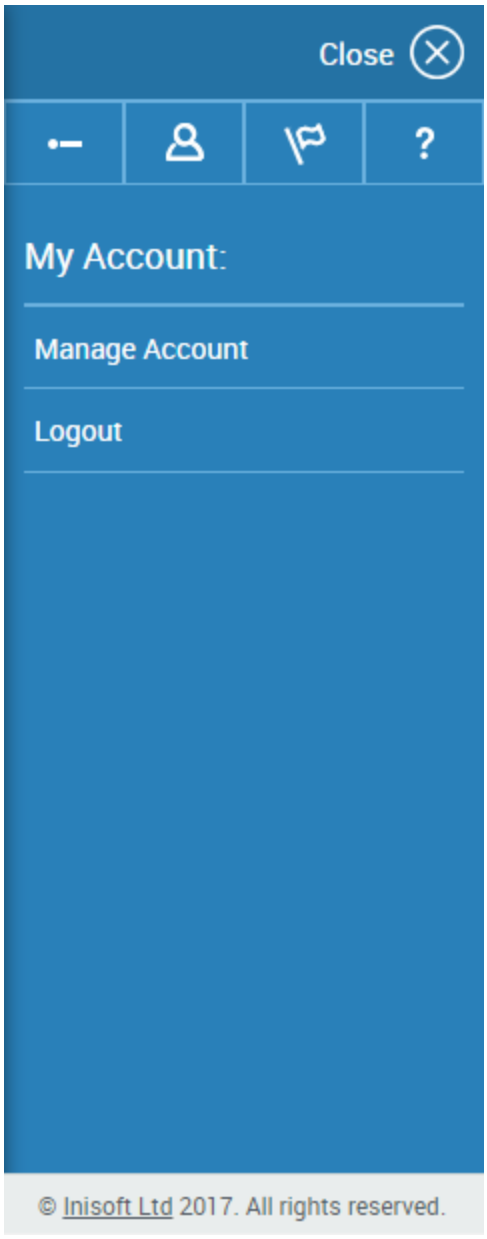
9.3.2 The Menu

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



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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.

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9.3.3 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.

9.3.4 Tasks

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

9.3.5 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.

9.3.5.1 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.

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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**.

9.3.5.2 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.

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> **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.

9.3.6 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.

9.3.7 Logging In

To log in to Syntelate Studio, follow these steps:

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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 696.

9.3.8 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**.

9.3.9 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.

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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.

9.3.10 Unlocking Records

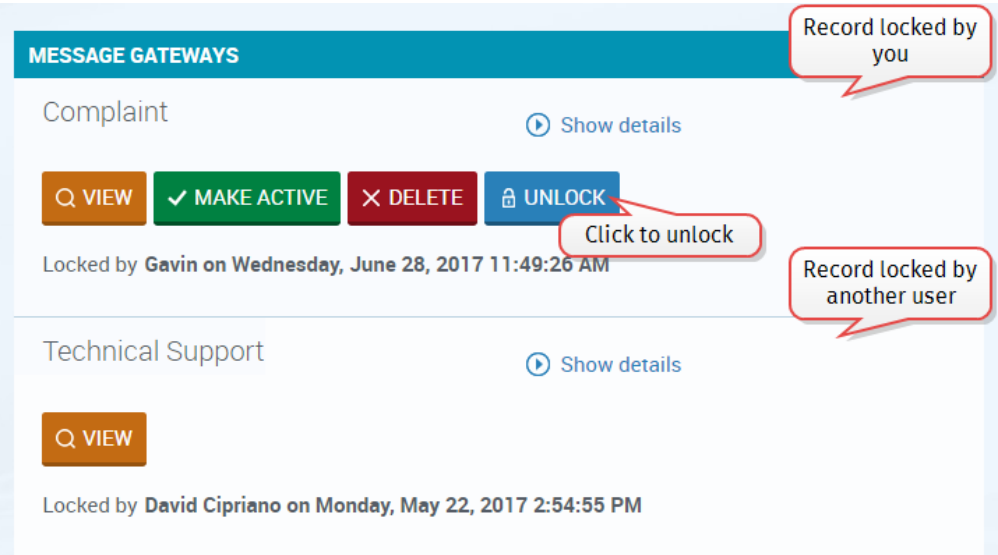
In many tiles, Syntelate Studio locks a record to you whenever you start to edit it. This is to prevent two users from editing the same record at the same time.

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:

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

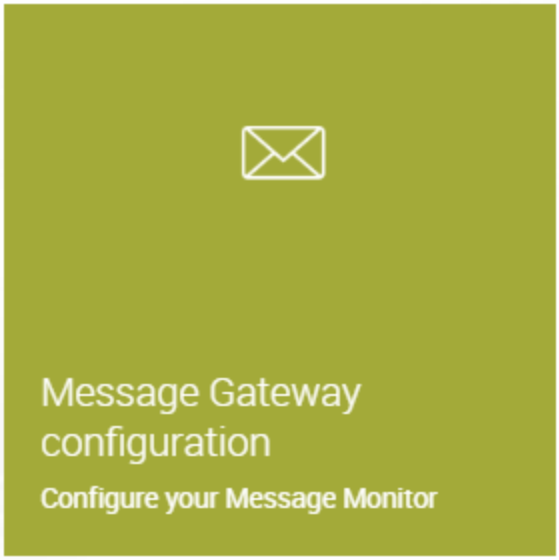
If you don't do this (but instead, for example, return to the Syntelate Studio home page by clicking the icon in the top-left), the record will remain locked to you. In this case, to unlock it, click the **UNLOCK** button in the list of records.

9.4 Message Gateways Configuration

9.4.1 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.

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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.

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9.4.2 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 590 for instructions.

9.4.3 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.

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See Outbound SMS Message Gateways on page 602 and SMS Chat Message Gateways on page 607 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*.

9.4.4 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 597 and Web Chat Message Gateways on page 630 for instructions.

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9.4.5 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 615 for instructions.

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

9.4.6 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.

9.4.6.1 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.

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Add the Gateway

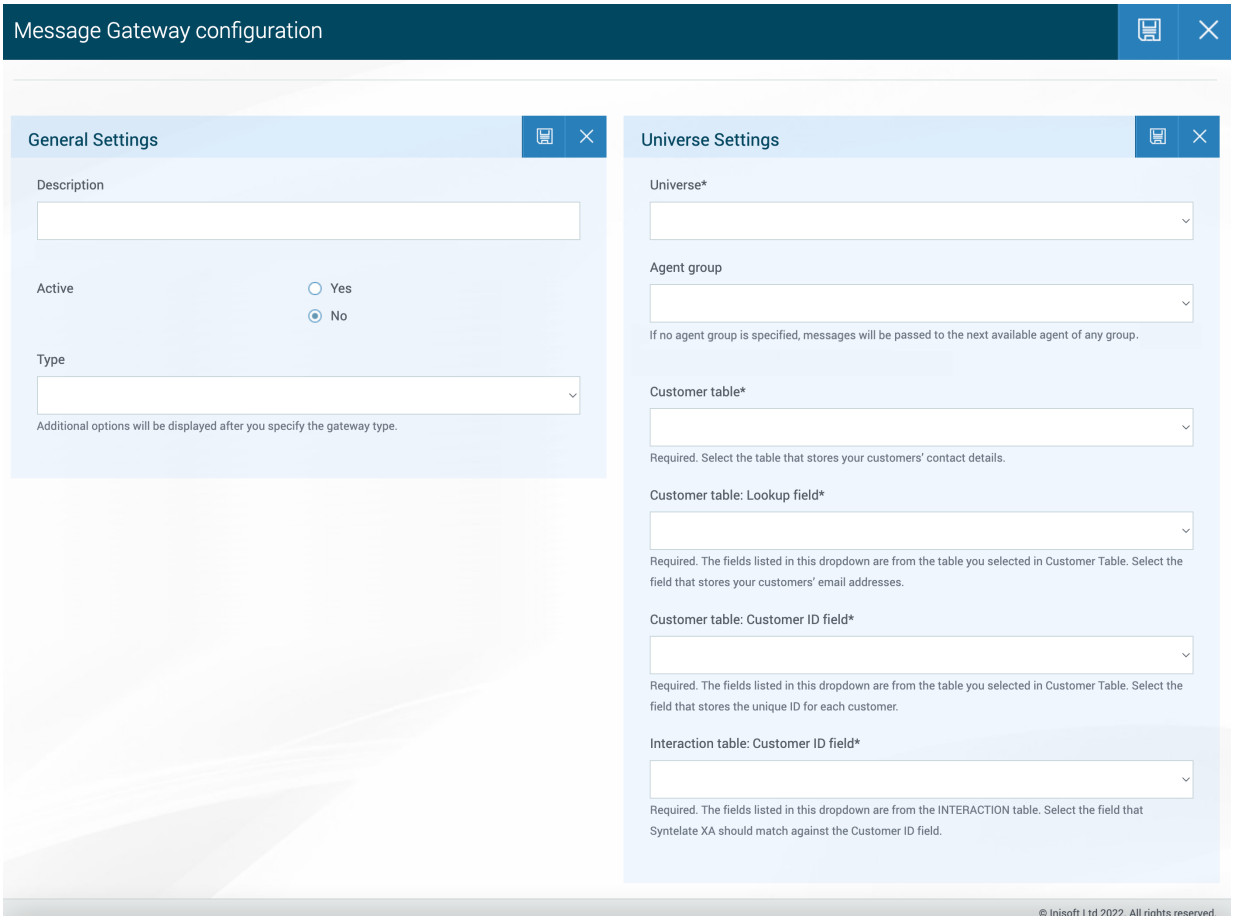
1. In Studio, go to **Message Gateway configuration**. You see a list of universes. Each universe has an Edit Message Gateway button.

   > **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.

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

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.

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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.

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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**.

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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.

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.

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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**.

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.

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 652
- Setting the Fields for New Customers on page 649

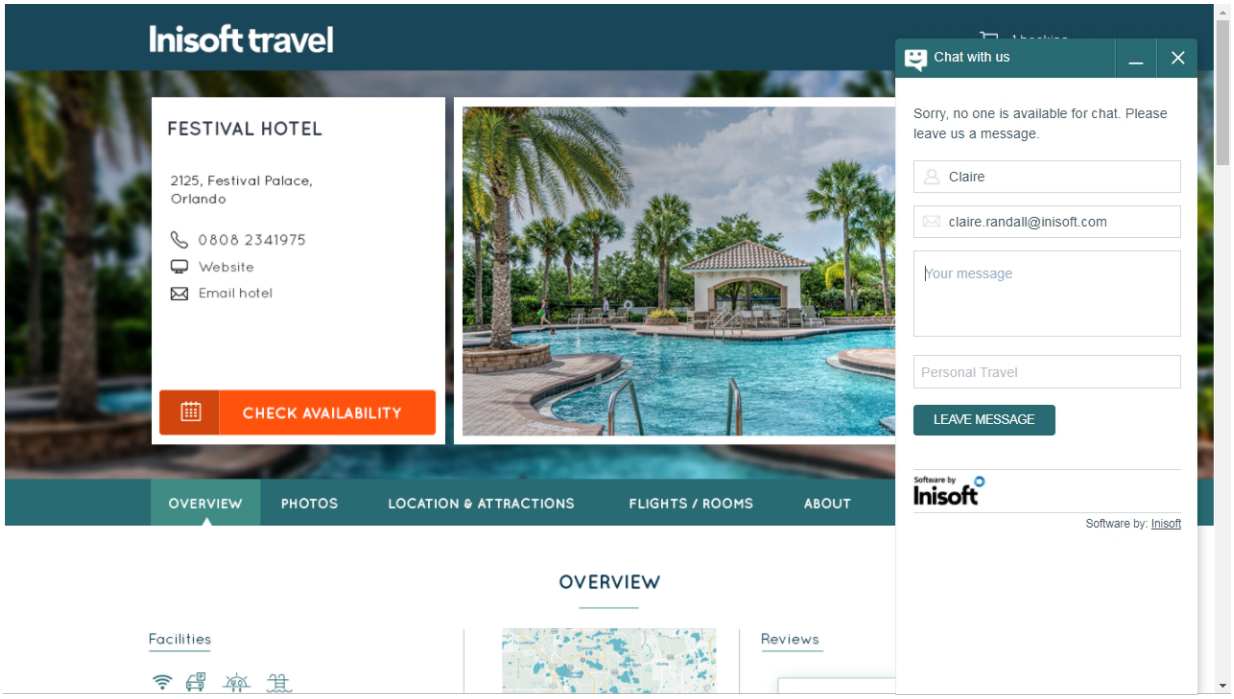
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Once you're happy with how your message gateway is configured, you need to set it to active before it can be used. See Making a Message Gateway Active/Dormant on page 643.

9.4.7 Leave a Message

9.4.7.1 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:

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- 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 702

9.4.7.2 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 641.

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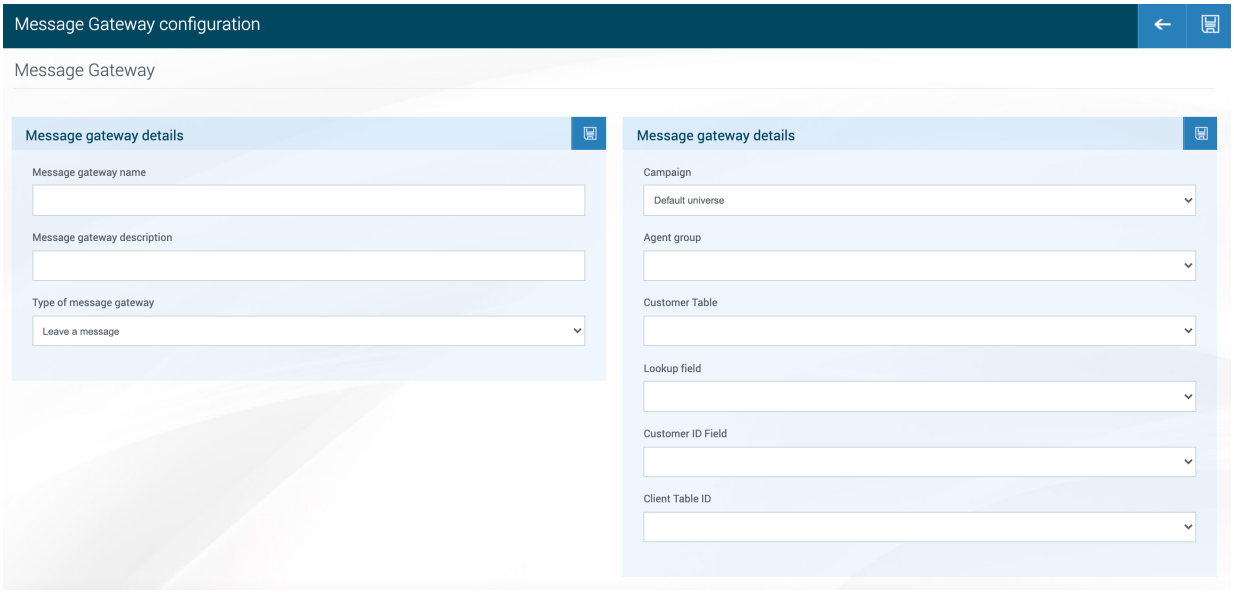
Configuring a Leave a Message Gateway from Scratch

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

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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.

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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  .

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 652
- Setting the Fields for New Customers on page 649
- Styling Leave a Message on page 729
- Configuring the subject of the email record: see Setting the Chat Messages on

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- page 647
- Manually Activating Leave a Message on page 723
- Making a Message Gateway Active/Dormant on page 643

9.4.8 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.

9.4.8.1 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.

Add the Gateway

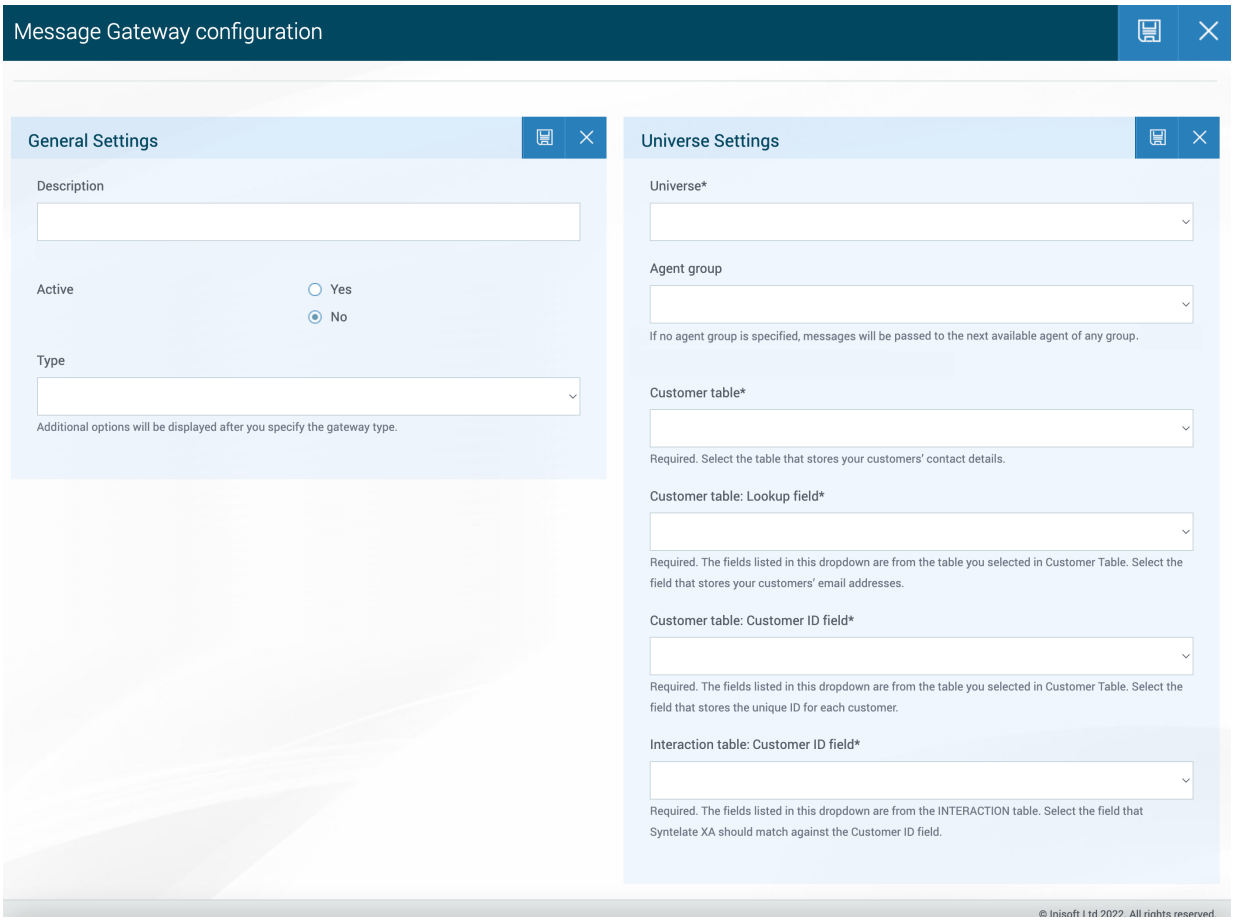
1. In Studio, go to **Message Gateway configuration**. You see a list of universes. Each universe has an Edit Message Gateway button.

   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.

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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**.

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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 656.

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.

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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.

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.

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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.

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 656
- Setting the Fields to Be Written to the Interaction Table on page 652
- Setting the Fields for New Customers on page 649

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 643.

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9.4.9 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.

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9.4.9.1 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.

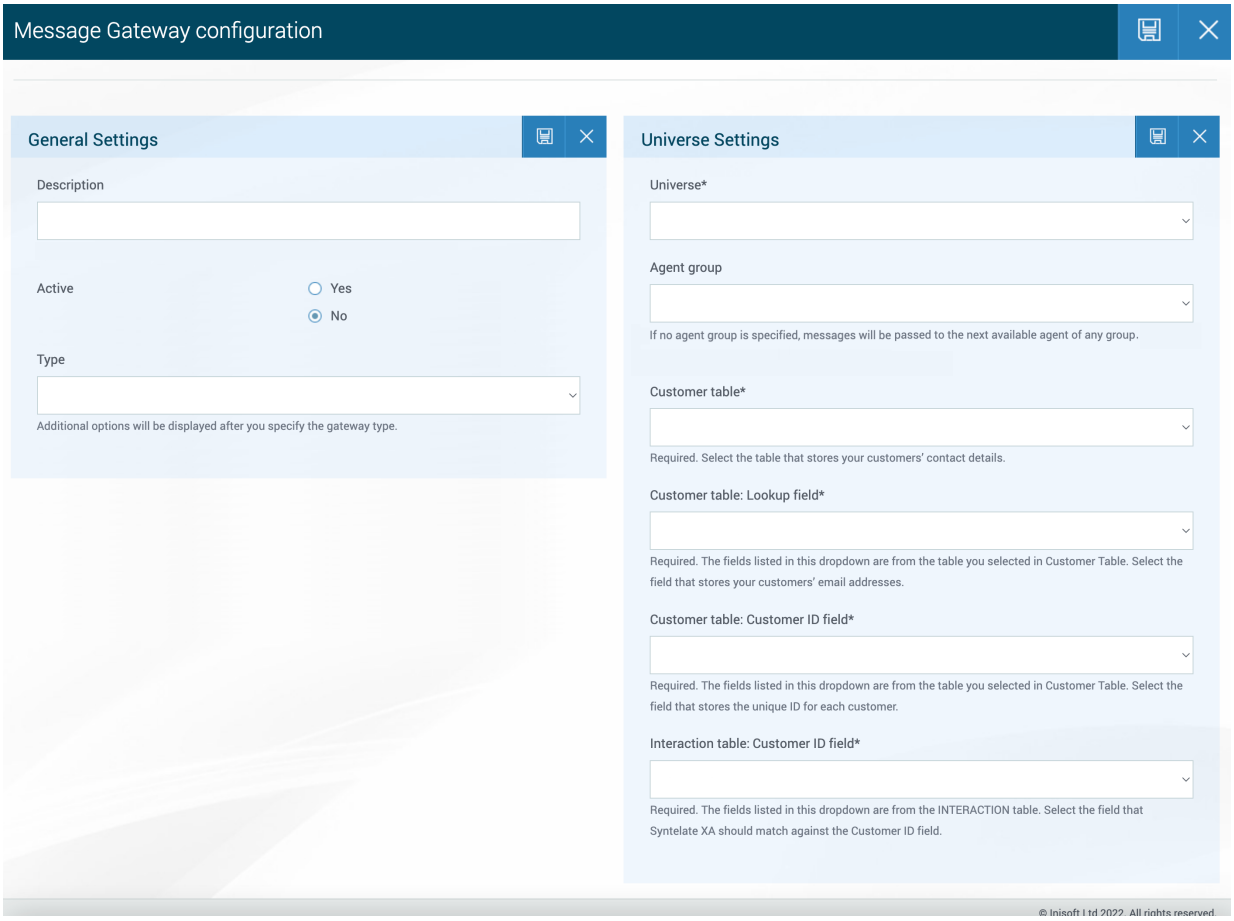
Add the Gateway

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.

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

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.

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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**.

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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.

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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**.

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.

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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.

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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 647. 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.

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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 656
- Setting the Chat Disposition Codes on page 644
- Setting the Chat Messages on page 647
- Setting the Fields to Be Written to the Interaction Table on page 652
- Setting the Fields for New Customers on page 649

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 643.

9.4.10 Social Media Message Gateways

9.4.10.1 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:

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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.

9.4.10.2 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.

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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 656 for information.

9.4.10.3 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.

9.4.10.4 Tasks

Click a task for step-by-step instructions:

Adding a Facebook Gateway 617
Adding a WhatsApp Gateway 623

9.4.10.5 Adding a Facebook Gateway

There are two ways to add a new Facebook gateway:

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

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> **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.

Add the Gateway

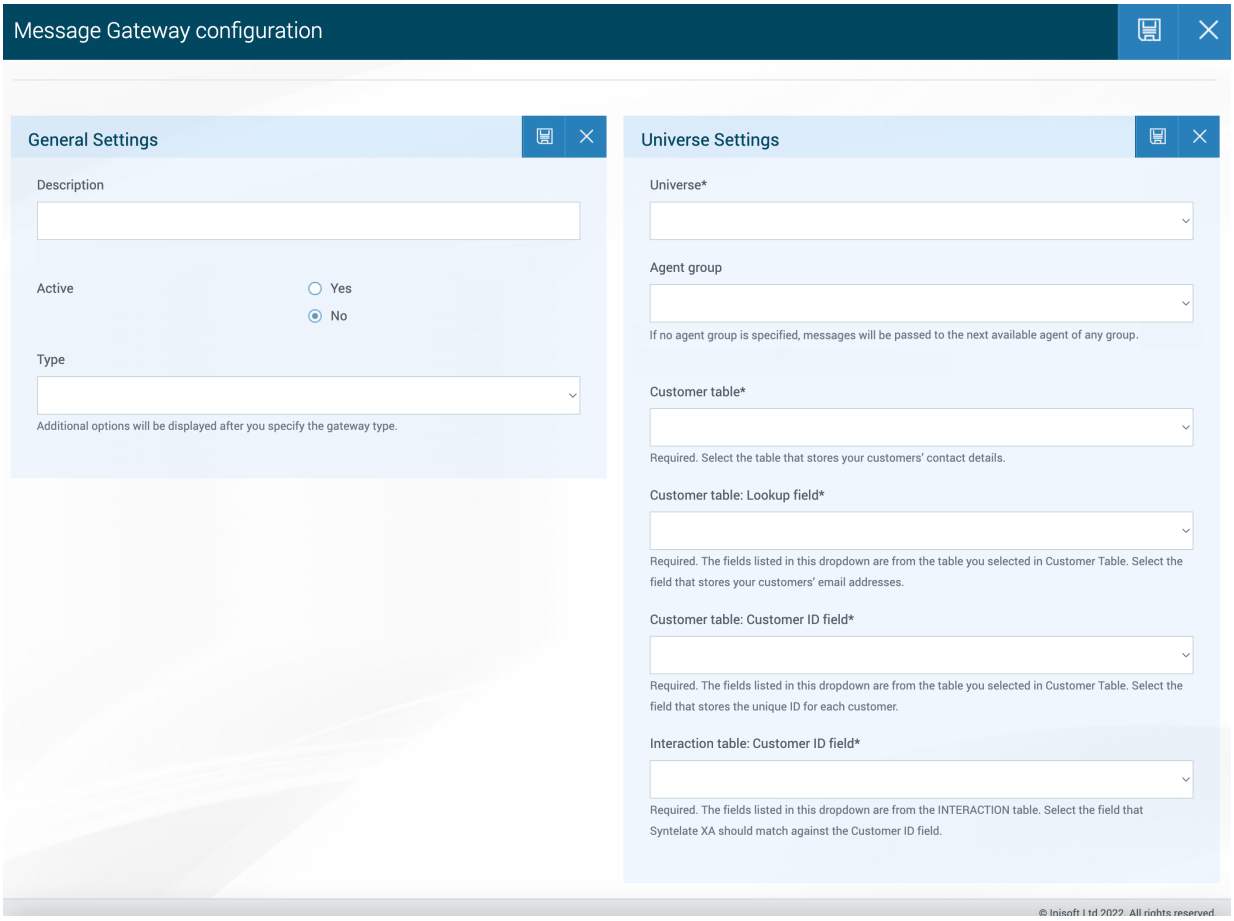
1. In Studio, go to **Message Gateway configuration**. You see a list of universes. Each universe has an Edit Message Gateway button.

   > **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.

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

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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.

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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**.

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.

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> **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.

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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 656
- Setting the Chat Disposition Codes on page 644
- Setting the Chat Messages on page 647
- Setting the Fields to Be Written to the Interaction Table on page 652 (for example, to restrict the Facebook chat to a particular workzone)
- Setting the Fields for New Customers on page 649 (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 643.

9.4.10.6 Adding a WhatsApp Gateway

There are two ways to add a new WhatsApp gateway:

- Copying a Message Gateway on page 641
- Add a new message gateway.

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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.

Add the Gateway

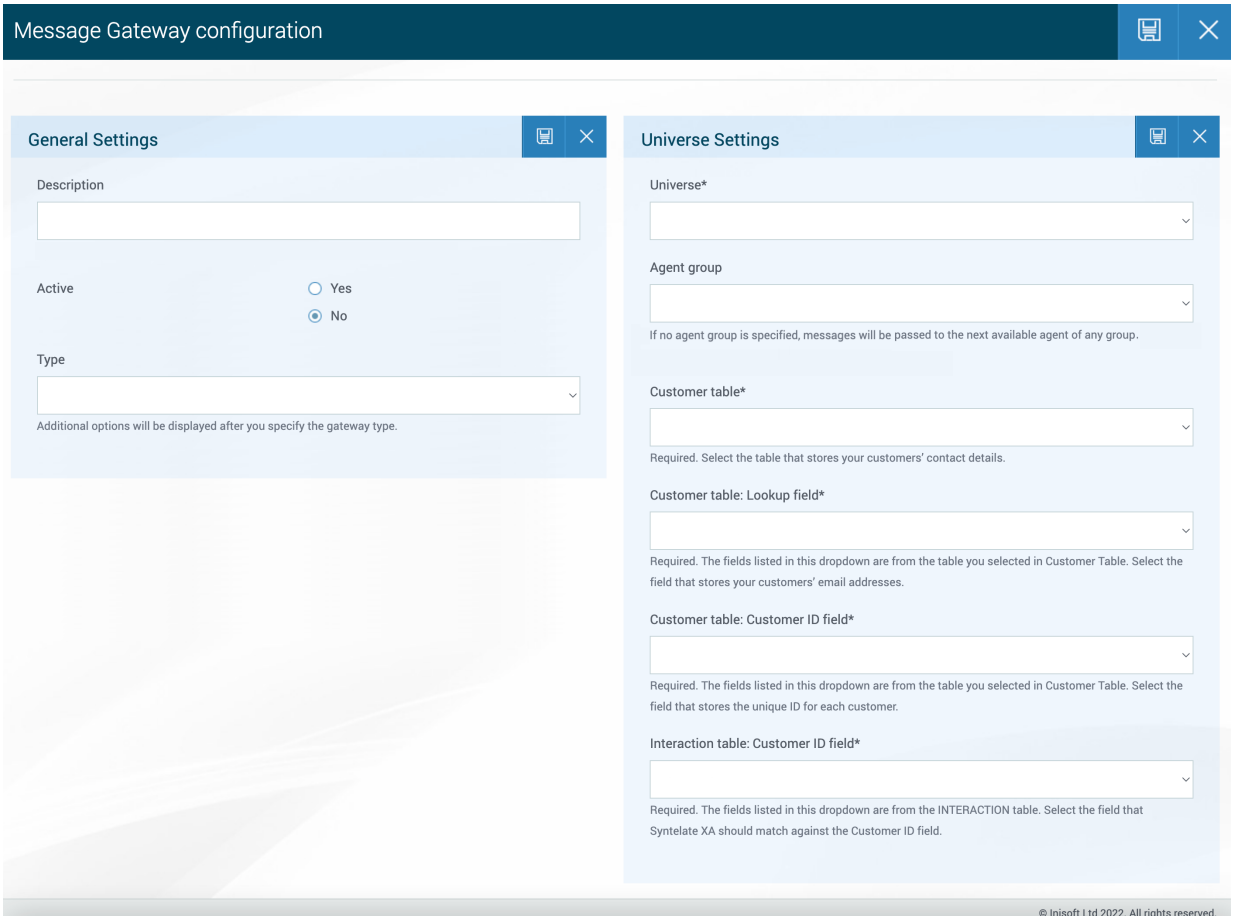
1. In Studio, go to **Message Gateway configuration**. You see a list of universes. Each universe has an Edit Message Gateway button.

   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.

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

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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**.

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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 on page 181 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**.

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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**.

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> **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.

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 656
- Setting the Chat Disposition Codes on page 644
- Setting the Chat Messages on page 647
- Setting the Fields to Be Written to the Interaction Table on page 652
- Setting the Fields for New Customers on page 649

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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 643.

9.4.11 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*.

9.4.11.1 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

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- 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

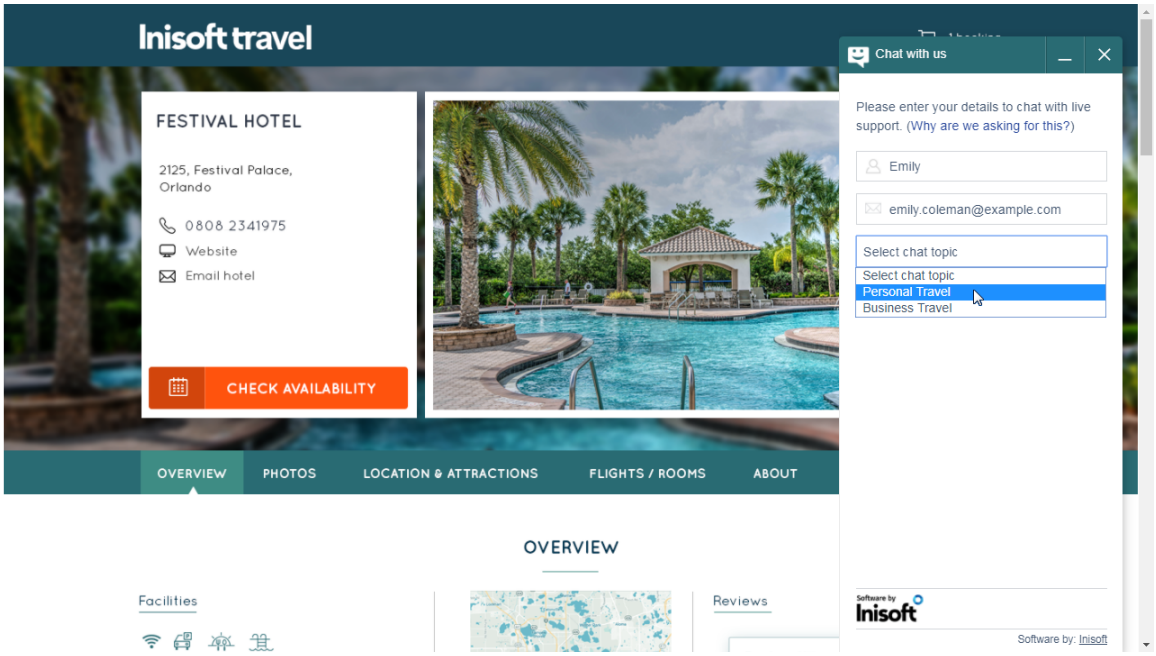
Note: You can allow customers to pick the topic themselves or you can automatically select the topic based on the web page from which the customer opens the chat. For more information, see document *Syntelate XA - Web Chat Configuration*.

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.

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

9.4.11.2 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 597.

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Add the Gateway

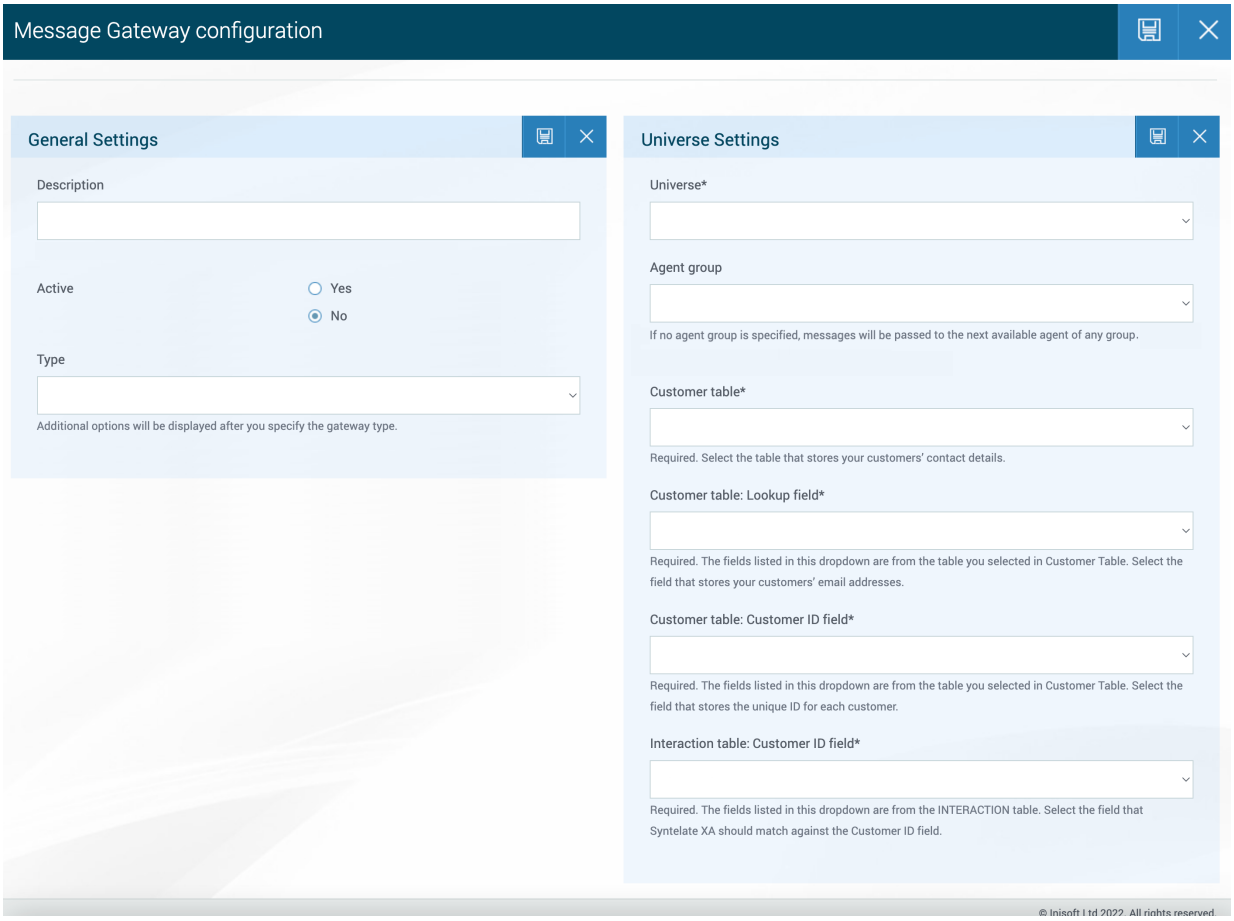
1. In Studio, go to **Message Gateway configuration**. You see a list of universes. Each universe has an Edit Message Gateway button.

   > **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.

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

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.

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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 Studioto 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

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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.

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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**.

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> **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 647.

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.

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> **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 647. 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 597 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.

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> **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 647. 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.

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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 656
- Setting the Chat Disposition Codes on page 644
- Setting the Chat Messages on page 647
- Setting the Fields to Be Written to the Interaction Table on page 652
- Setting the Fields for New Customers on page 649

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 643.

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*.

9.4.12 General Tasks

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

9.4.12.1 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.

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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** box.
5. Click **SAVE**.

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 590
- Outbound SMS Message Gateways on page 602
- SMS Chat Message Gateways on page 607
- Web Chat Message Gateways on page 630
- Social Media
- Leave a Message on page 597

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9.4.12.2 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**.

9.4.12.3 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 649.

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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.

9.4.12.4 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.

9.4.12.5 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.

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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 on page 210 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.

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.

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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  .

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  .

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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**.

9.4.12.6 Setting the Chat Messages

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.

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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.

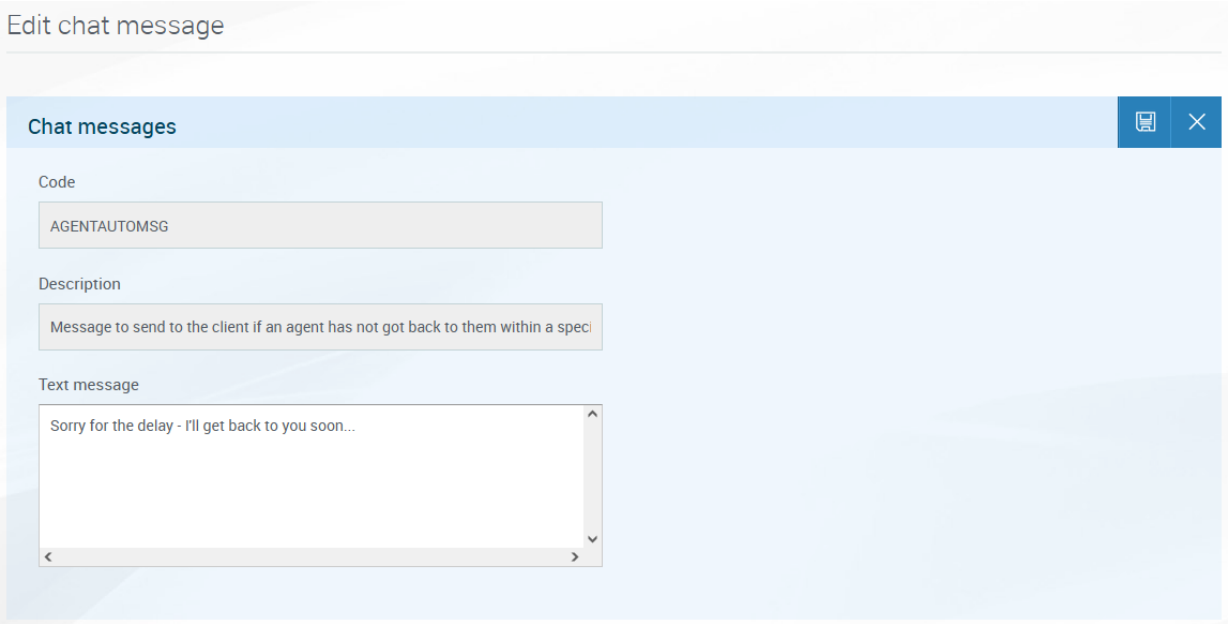


4. From the **Message gateways for campaign** page, click **VIEW** for the message gateway that you want to edit.

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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.

9.4.12.7 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

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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.

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.

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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  .

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  .

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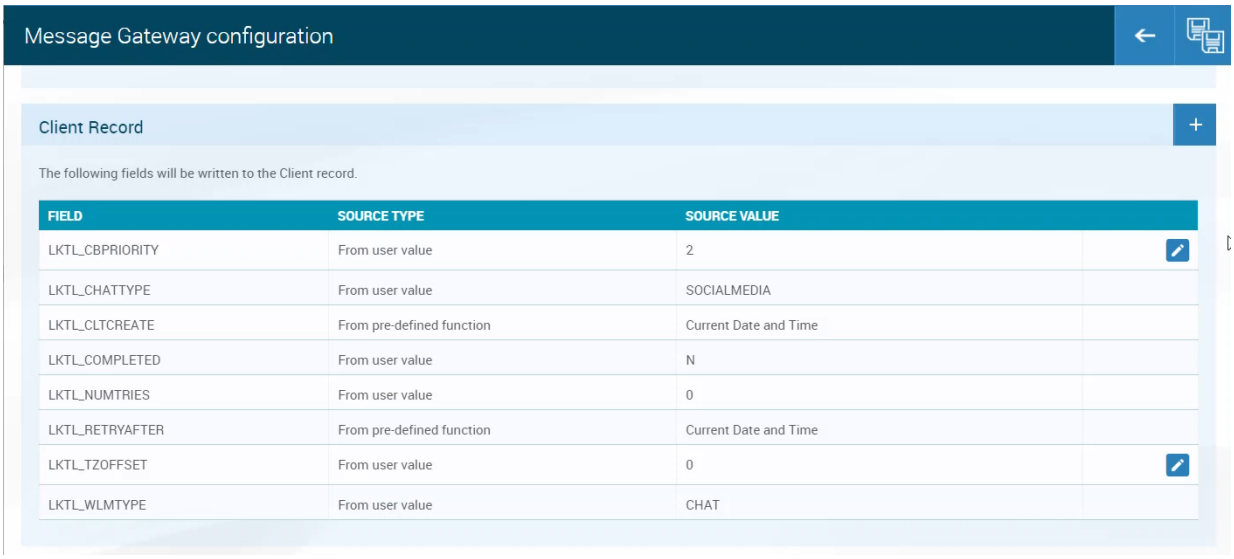
Deleting a Field

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**.

9.4.12.8 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**.



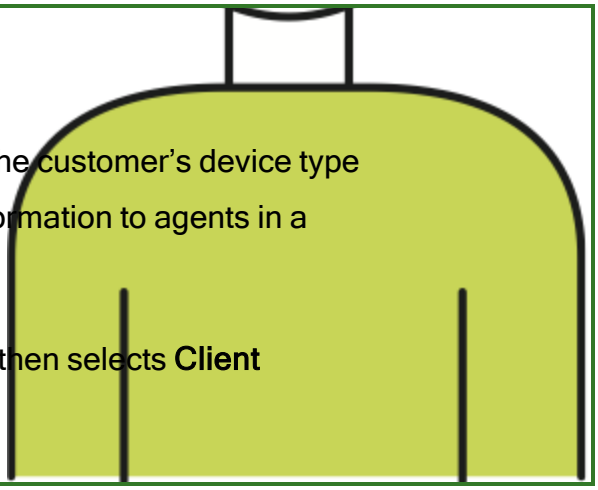
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You use the **Client Record** section to manage what information Syntelate XA will write to the INTERACTION_X table when processing interactions for this message gateway. You can edit some of these fields and add new ones too.

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.



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

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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.

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  .

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

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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  .

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**.

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9.4.12.9 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.

9.5 Smart Text Editor

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

9.5.1 Concepts

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

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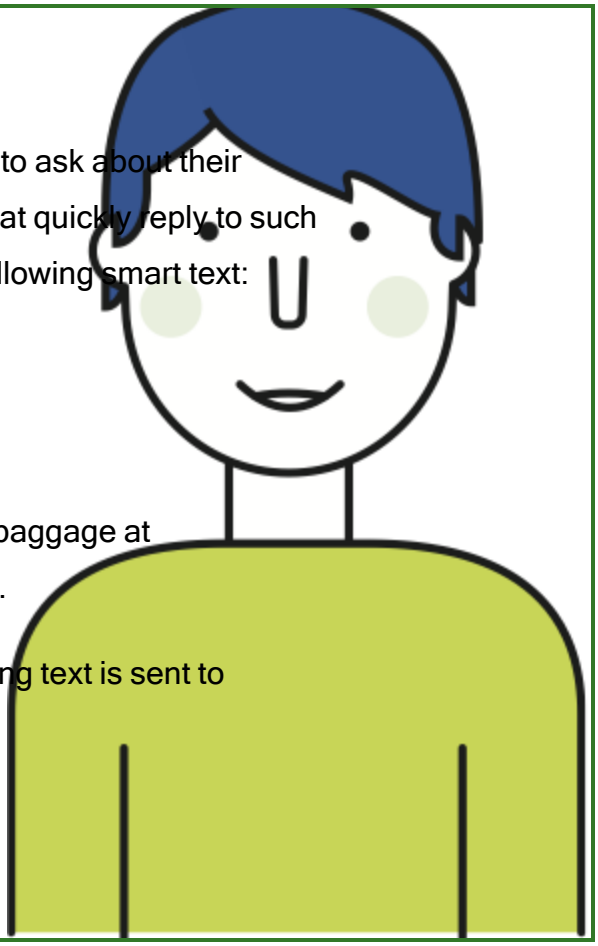
9.5.1.1 Smart Text

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.

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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:

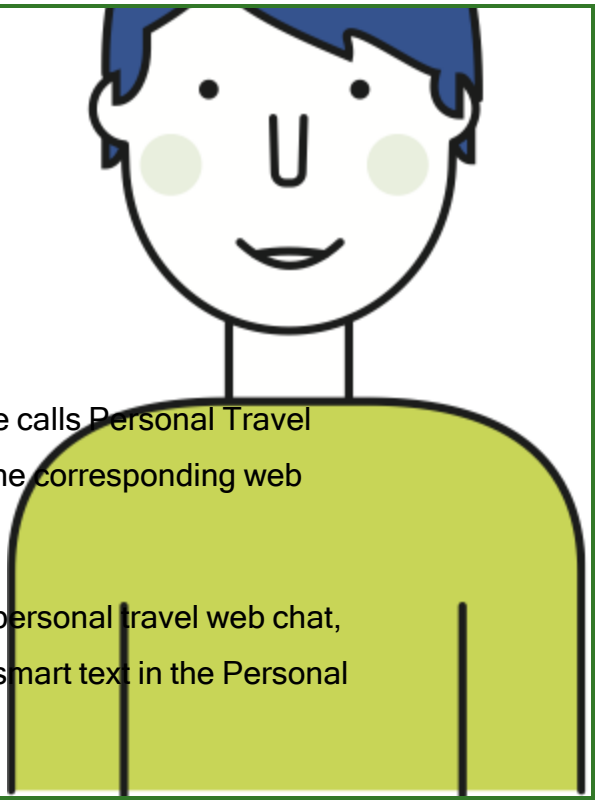
You can find general advice on baggage at http://inisoft.com/baggage.

9.5.1.2 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).

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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.

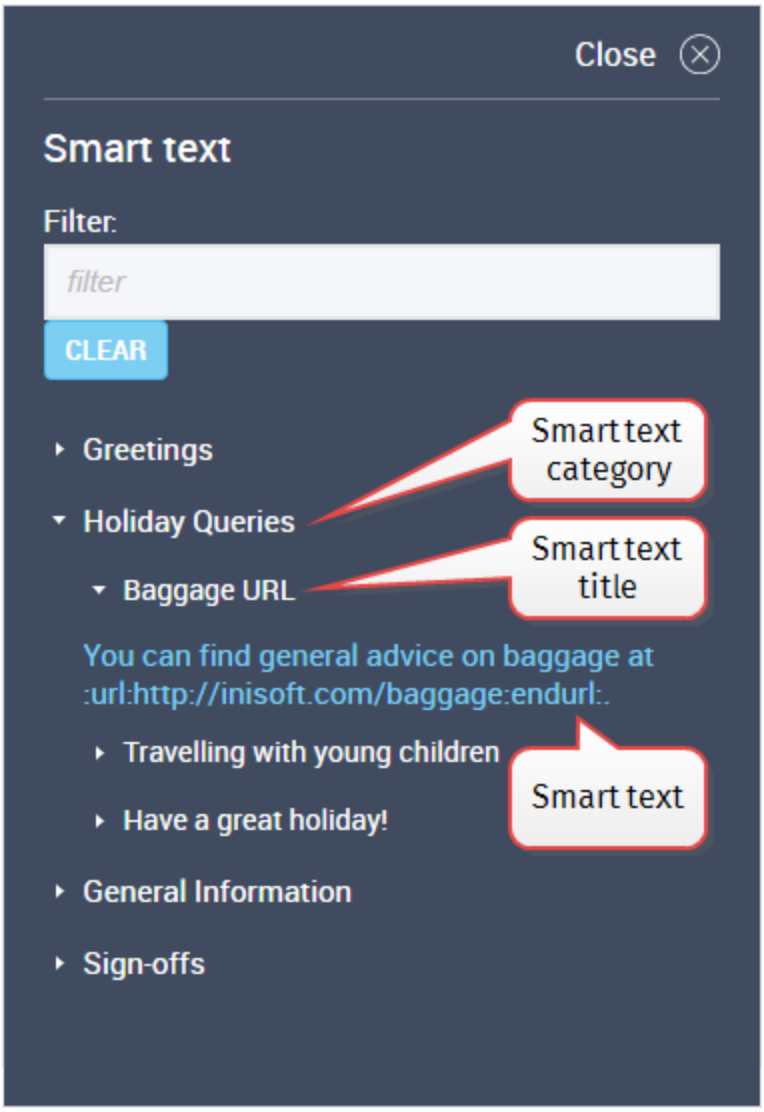
9.5.1.3 Smart Text Categories

Smart text categories let you arrange smart text for agents.

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9.5.2 Smart Text in Syntelate XA

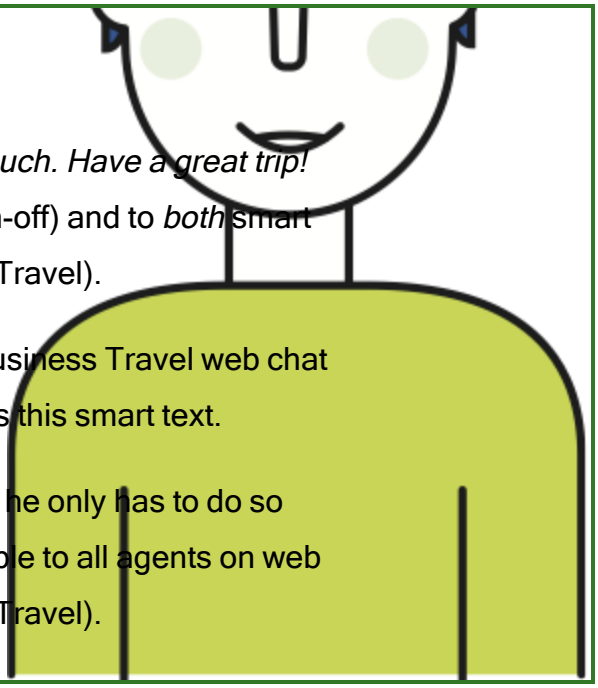
Here's how smart text is presented to agents in the **Smart text** menu of Syntelate XA:



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.

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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).

9.5.3 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.

9.5.4 Tasks

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

9.5.5 Adding a Smart Text Category

To add a smart text category, follow these steps:

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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.

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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.

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8. Click  .

9.5.6 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.

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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  .

9.5.6.1 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*.

9.5.7 Adding Smart Text

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

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9.5.7.1 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**.

9.5.7.2 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.

Inserting a Database Field

To insert a database field, follow these steps:

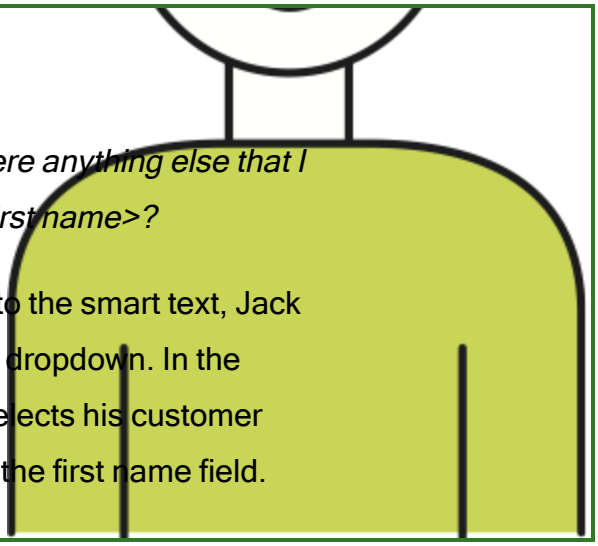
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1. In the **Insert Campaign fields** section, select your universe in the **Campaign** dropdown. The **External tables** dropdown and fields are shown.
2. In the **External tables** dropdown, select the database table containing the field that you 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.



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 +.

Inserting Radio Buttons

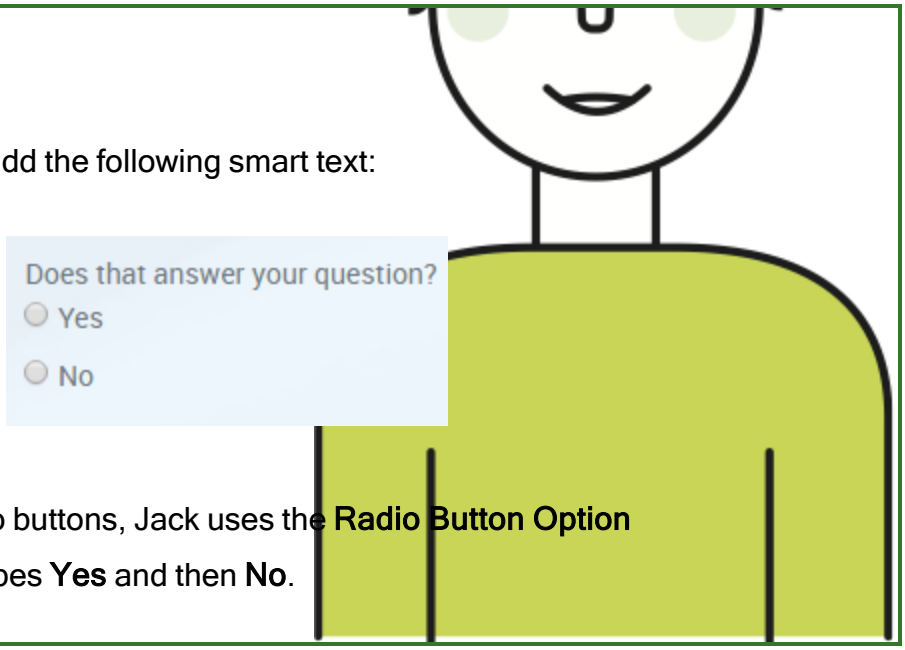
To insert radio buttons into your smart text, follow these steps:

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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**.

9.5.7.3 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.

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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 661.

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.

9.5.8 Copying Smart Text / a Group / a Category

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

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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 665
> - Adding a Smart Text Group on page 664
> - Adding a Smart Text Category on page 661

7. Click  .

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9.5.9 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**.

9.5.10 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.

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> **Note:** For information about the fields on each page, see the appropriate section:
>
> - Adding Smart Text on page 665
> - Adding a Smart Text Group on page 664
> - Adding a Smart Text Category on page 661

4. Click  .

9.6 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.

9.6.1 Tasks

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

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9.6.2 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**.

9.6.3 Deleting an SMTP Configuration

To delete an SMTP configuration, follow these steps:

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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**.

9.6.4 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.

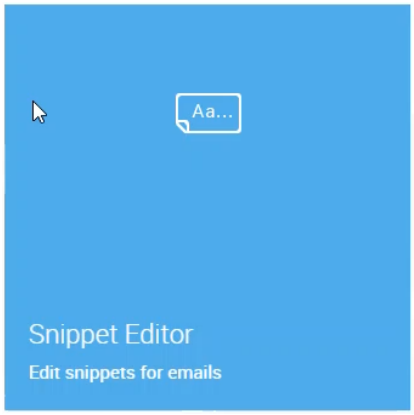
> **Note:** If a password has been specified for the SMTP configuration, you must enter this again in the **Confirm password** box.

3. Click **SAVE**.

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9.7 Snippet Editor

9.7.1 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

9.7.1.1 Supervisor Experience

Supervisors and system administrators manage snippets in the Snippet Editor.

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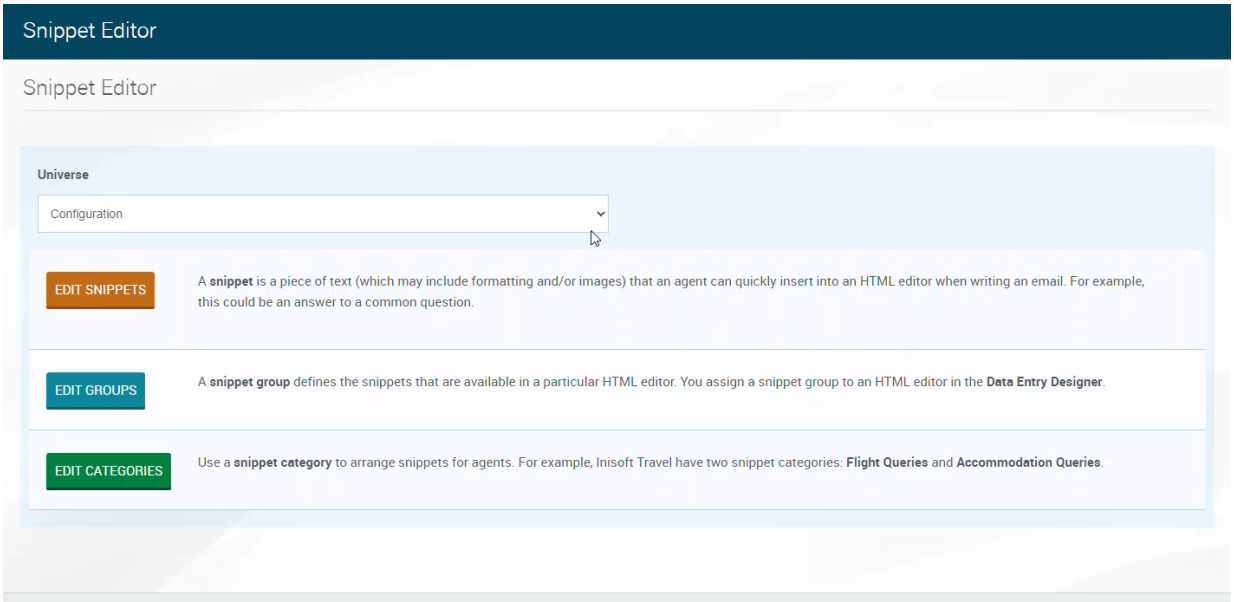
9.7.1.2 Agent Experience

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

9.7.1.3 Snippet Library and Universe

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

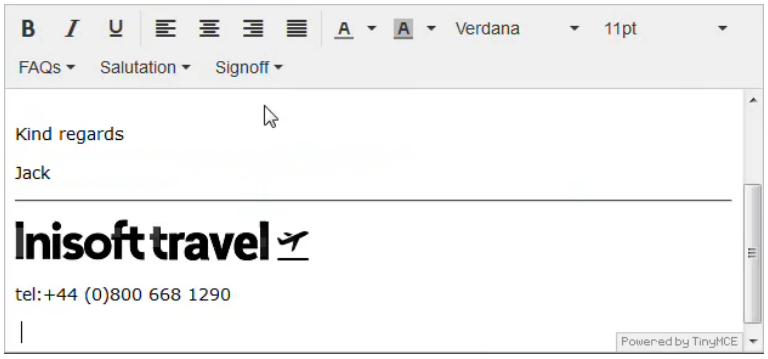
Your snippet library will be saved to the universe that you specify when you first open the Snippet Editor.



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

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9.7.2 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.

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9.7.3 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.

9.7.4 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

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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 on page 286, 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.

9.7.4.1 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.

9.7.4.2 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.

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9.7.4.3 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.

9.7.5 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.

9.7.6 Tasks

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

9.7.7 Adding a Snippet Category

To add a snippet category, follow these steps:

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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

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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  .

9.7.7.1 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.

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9.7.8 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.

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

7. **SAVE** your changes  .

8. **REFRESH** the web server  .

9.7.8.1 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.

9.7.8.2 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 678 for guidance.

9.7.9 Adding a Snippet

To add a snippet, first follow these steps:

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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.

9.7.9.1 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.)

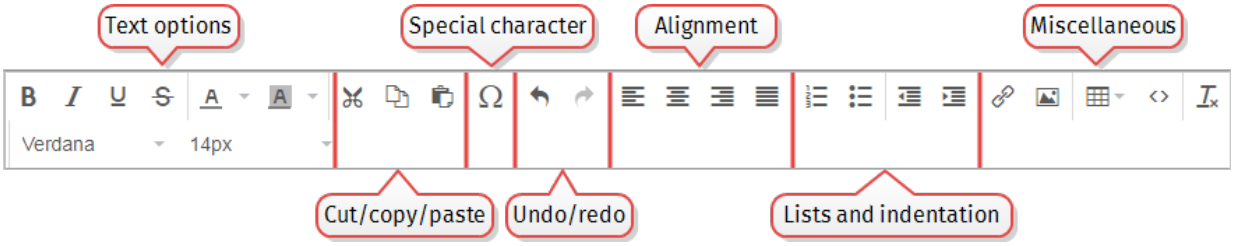
9.7.9.2 Step 2: Content

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

The Toolbar

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

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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.

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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

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Button	Description
	and color) from the selection.

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.

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9.7.9.3 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 680.
>
> 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.

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9.7.9.4 Step 4: Save

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

9.7.9.5 Step 5: Refresh the Server

REFRESH the web server  .

9.7.10 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.

9.8 Tile Security

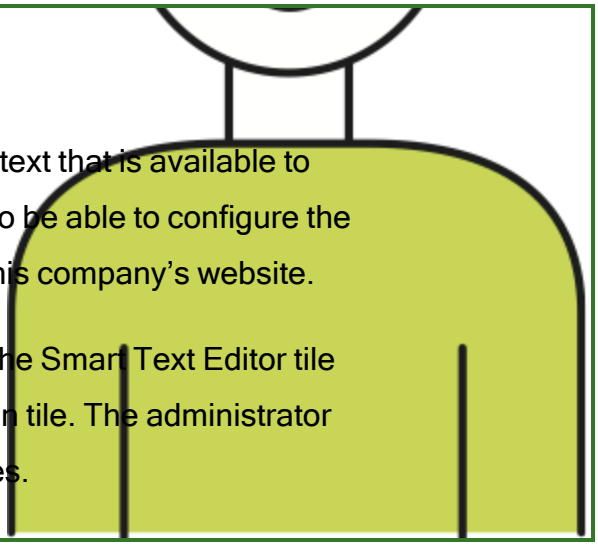
Use the **Tile Security** tile of Syntelate Studio to grant or restrict access to tiles in Syntelate Studio.

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9.8.1 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 694.

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9.8.2 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.

9.8.3 Tasks

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

9.8.4 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  .

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9.8.5 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  .

9.8.6 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:

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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  .

9.9 User Configuration

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

9.9.1 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).

9.9.2 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:

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- **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)*.

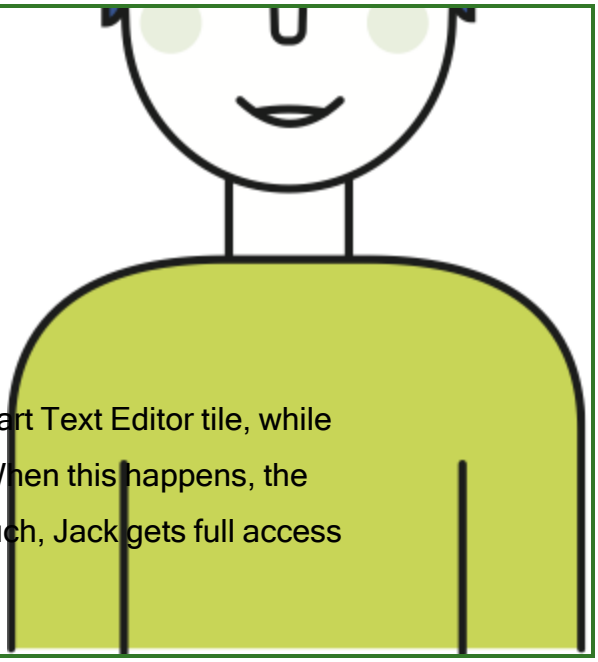
Say you assign two roles to a user, and those roles have clashing access levels for a tile. When this happens, the user is granted the higher access level.

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.



9.9.3 Configure Users vs Configure Roles

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

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

9.9.4 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.

9.9.5 Tasks

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

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9.9.6 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  .

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9.9.6.1 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 692.

9.9.7 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!

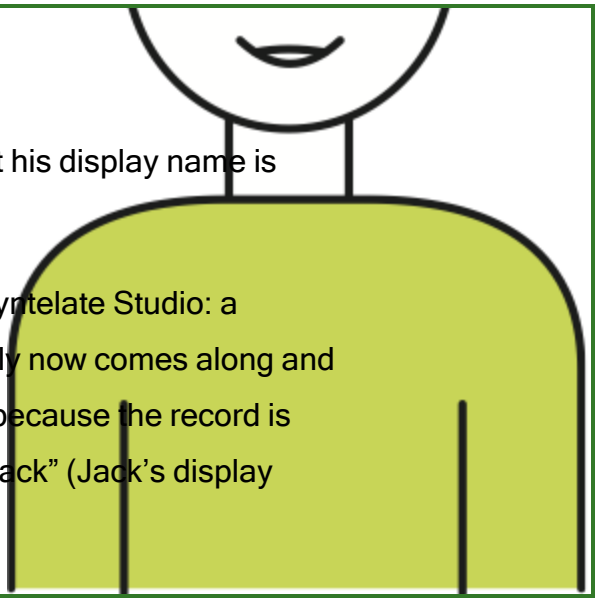
3. In **Display Name**, enter the name by which the user will be known in Syntelate Studio.

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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.

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> **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.

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9.9.8 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**.

9.9.9 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  .

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9.9.10 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.

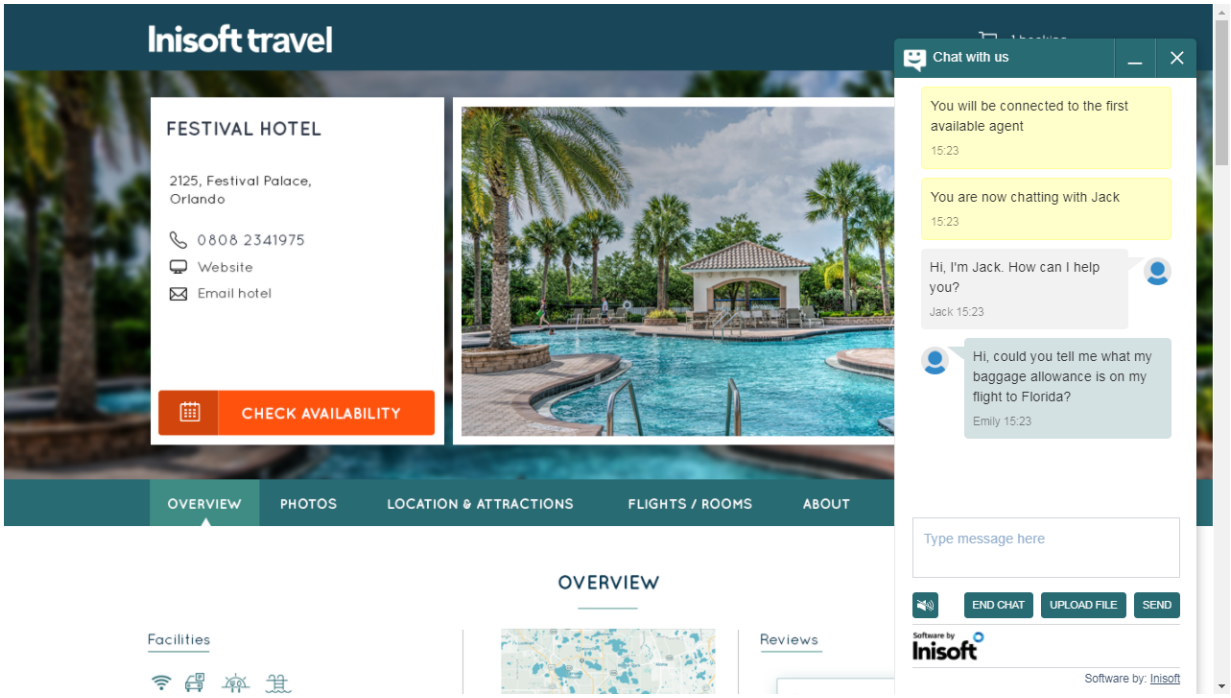
   > **Note:** For a description of each of these fields, see Adding a User on page 698.

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.

9.10 Web Chat Config.

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

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9.10.1 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

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- 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.

9.10.2 Tasks

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

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9.10.3 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 709.

9.10.3.1 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.

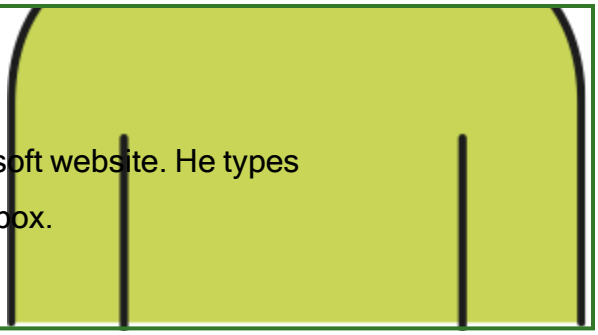
   > **Note:** This is for your reference only. The name will not be shown to customers or agents.

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

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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.

9.10.3.2 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 729
- Styling Leave a Message on page 729
- Manually Activating Leave a Message on page 723
- Setting Your Web Chat's Availability on page 727
- Configuring Attachments on the next page
- Setting the Topics for Your Web Chat on page 724
- Customizing the Display Options on page 710

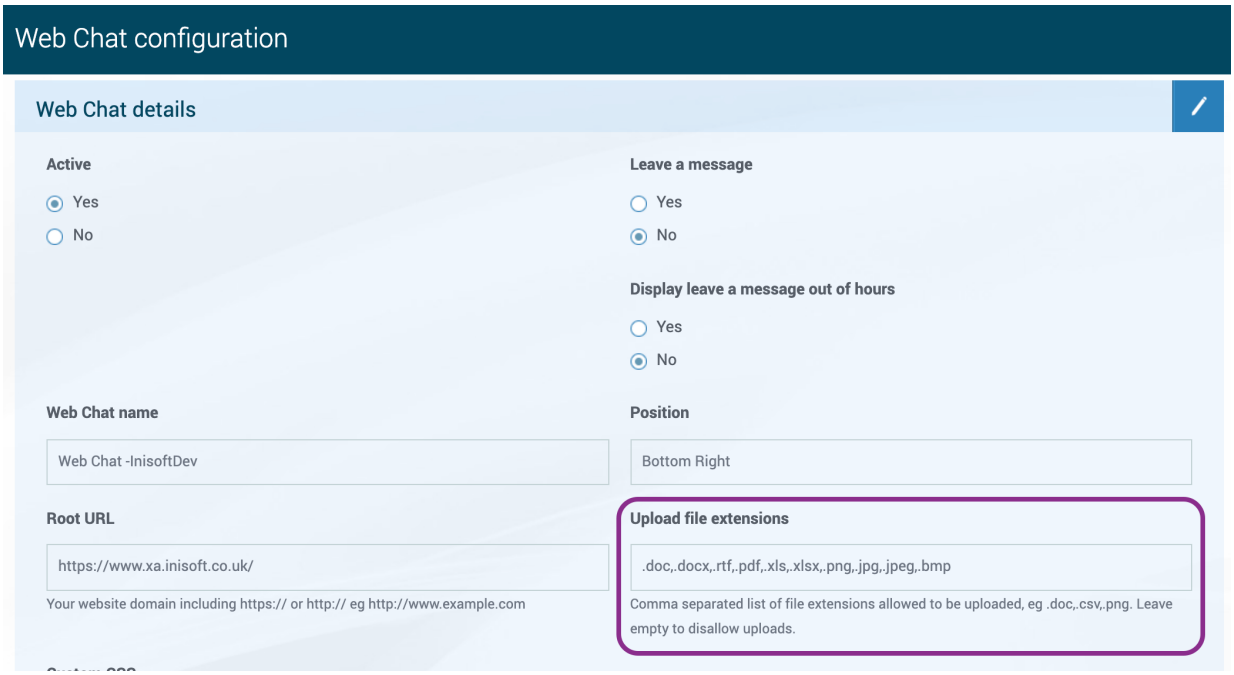
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Before you can use the web chat on your website, you'll also need to activate it and embed some code in your website. See Making a Web Chat Active/Dormant on page 723 and Embedding a Web Chat in Your Website on page 720.

9.10.4 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.

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> **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  .

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.

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See document *Syntelate XA - Message Gateway Configuration*.

9.10.5 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.

9.10.5.1 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.

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9.10.5.2 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 729
- Styling Leave a Message on page 729
- Manually Activating Leave a Message on page 723
- Setting Your Web Chat's Availability on page 727
- Configuring Attachments on page 707
- Setting the Topics for Your Web Chat on page 724
- 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 720.

9.10.6 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?).

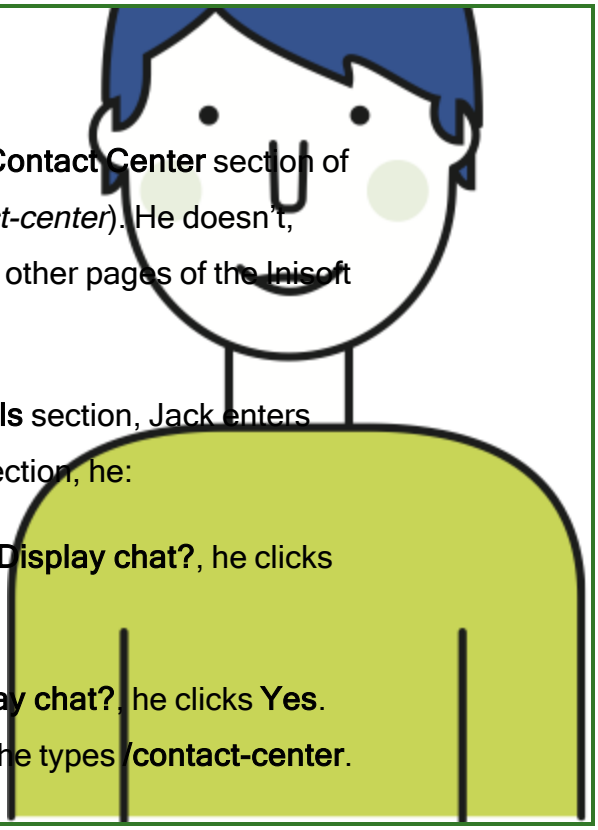
Maybe you would like the topic to be automatically set based on the web page from which the customer starts the web chat, or for your web chat to only be visible on specific pages of your website. If so, this is where you configure that.

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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.

9.10.6.1 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**.

9.10.6.2 Displaying the Average Wait Time

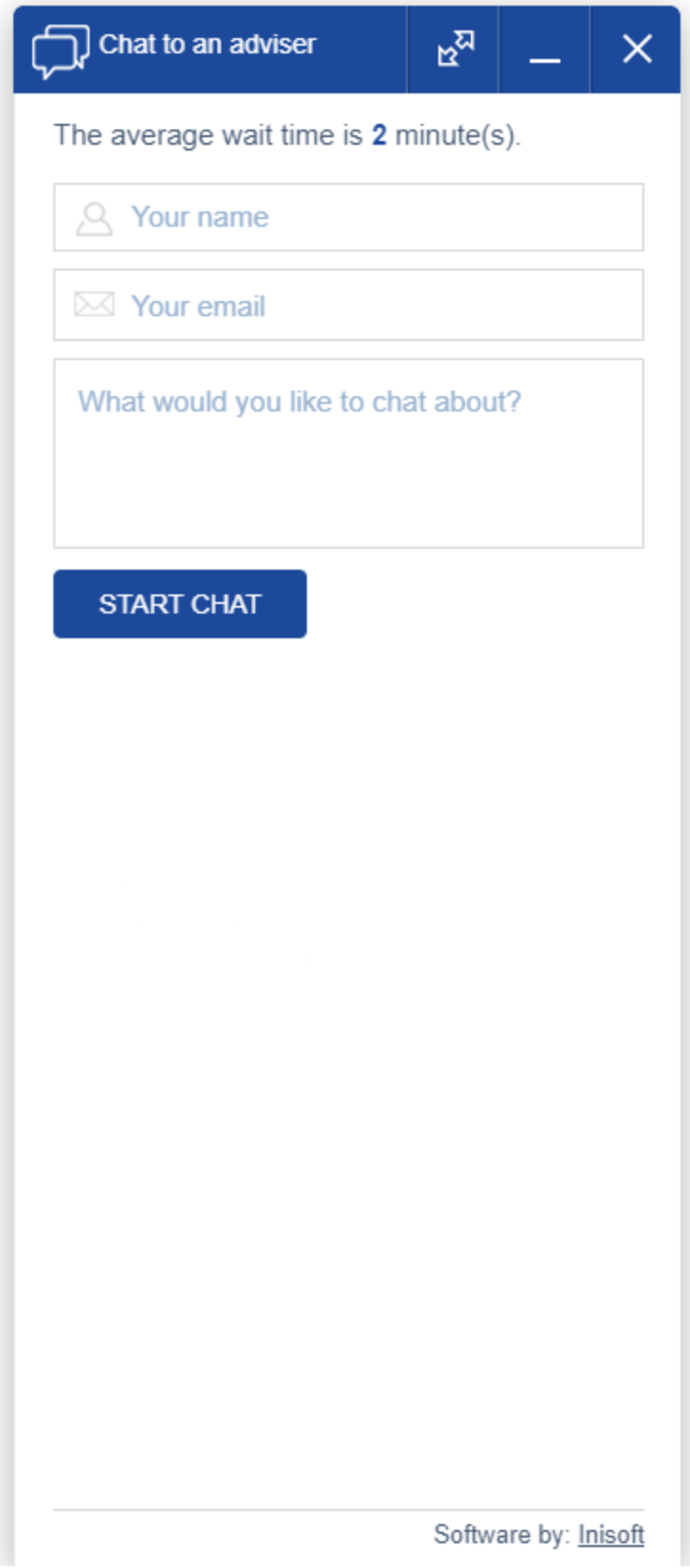
The **average wait time** can be displayed to the customer. The pre-chat survey has the option to display the average wait time other chat users have experienced in the last hour.

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.

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

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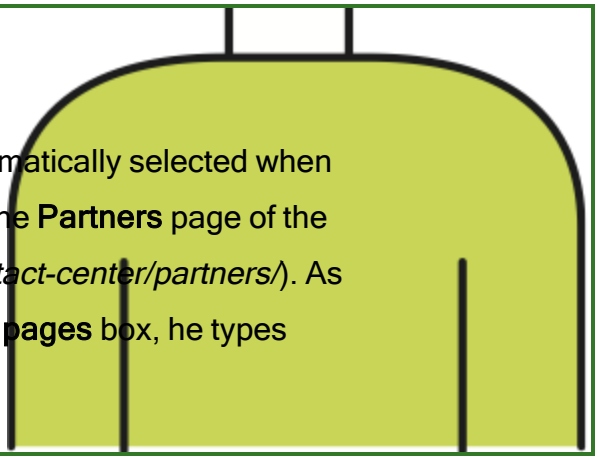
In addition, web chat queue information is available via the **Webchat webAPI**, which allows development teams to display an average wait time on their own websites if they want to promote web chat use. For example, on web-page banners inviting customers to try out the web chat.

9.10.6.3 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.

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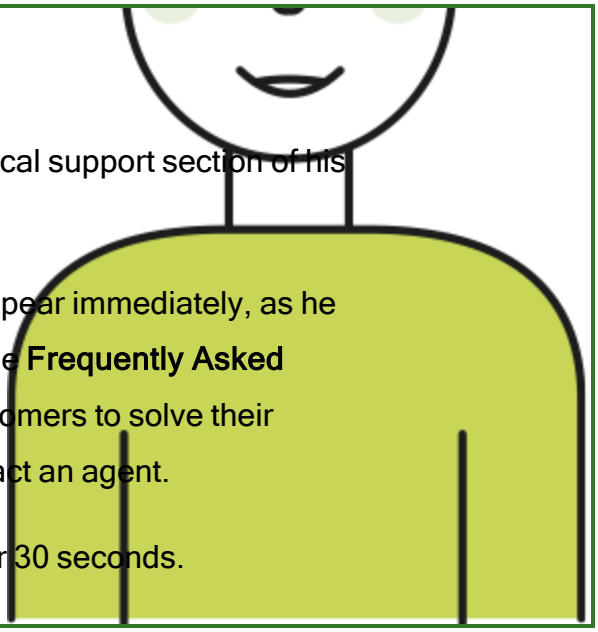
> **Note:** If you instead click **Let the customer pick the topic**, the customer will be able to select from all the topics that you've added in the **Available Web Chat topics** section.

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

9.10.6.4 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.

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

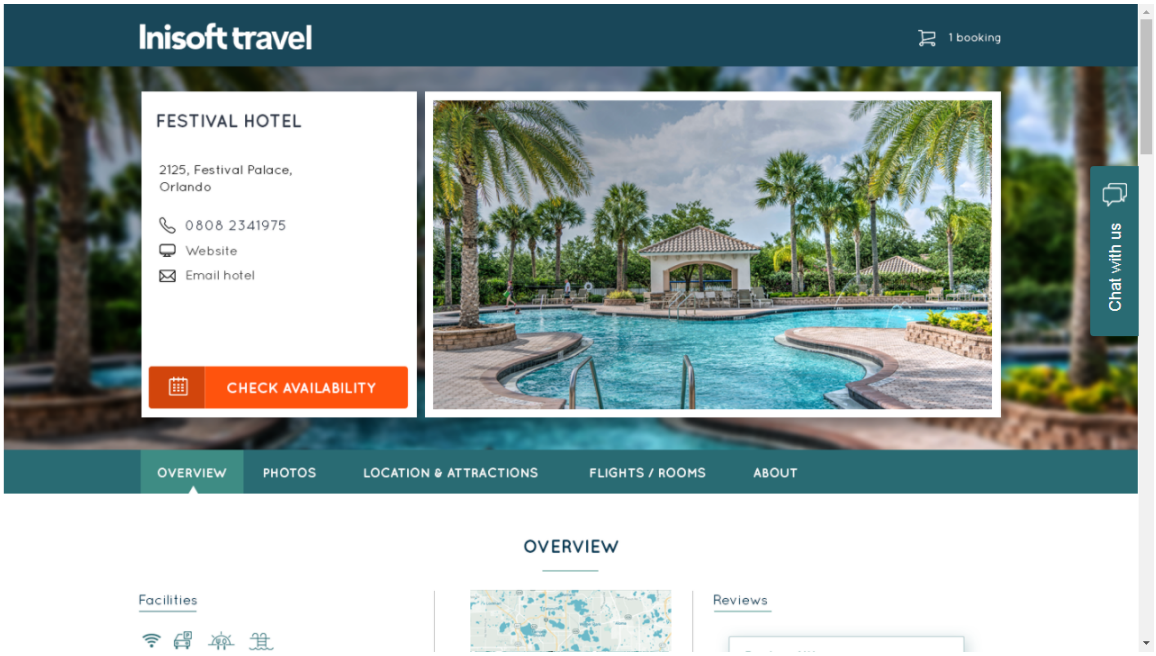
1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.
2. In the **Display options** section, click  for the display option that you want to edit. The **Display options** page is shown.
3. Under **Display after**, click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

9.10.6.5 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.

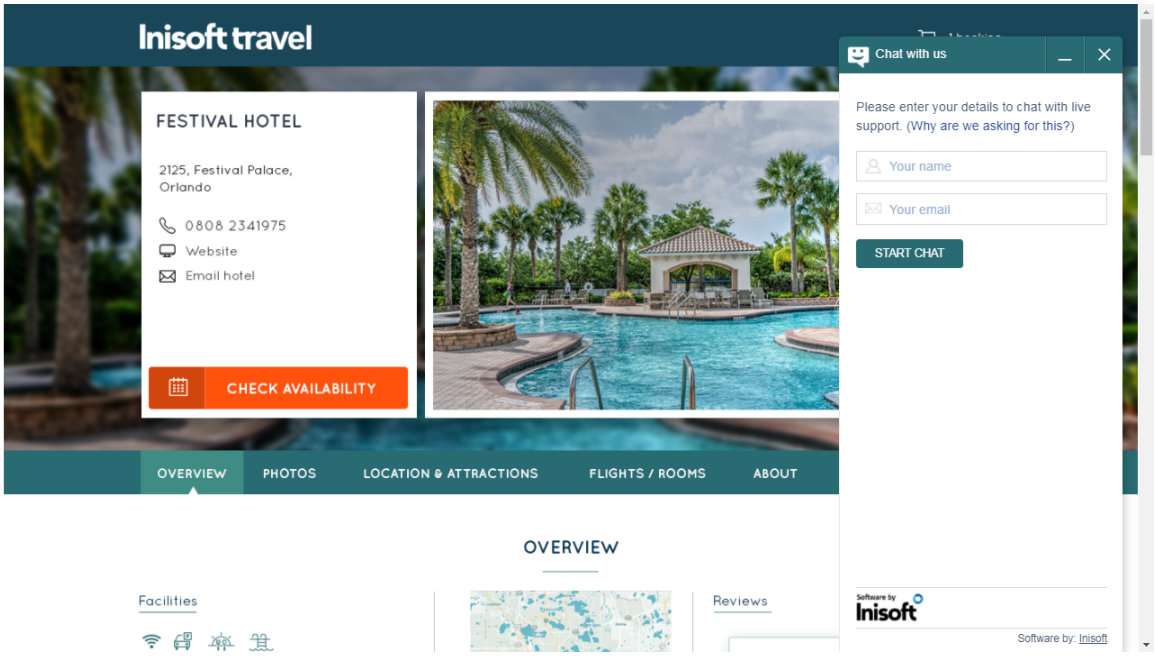
> **EXAMPLE**
>
> When a customer first visits the Inisoft Travel website, the web chat button is shown on the right-hand side.

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

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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

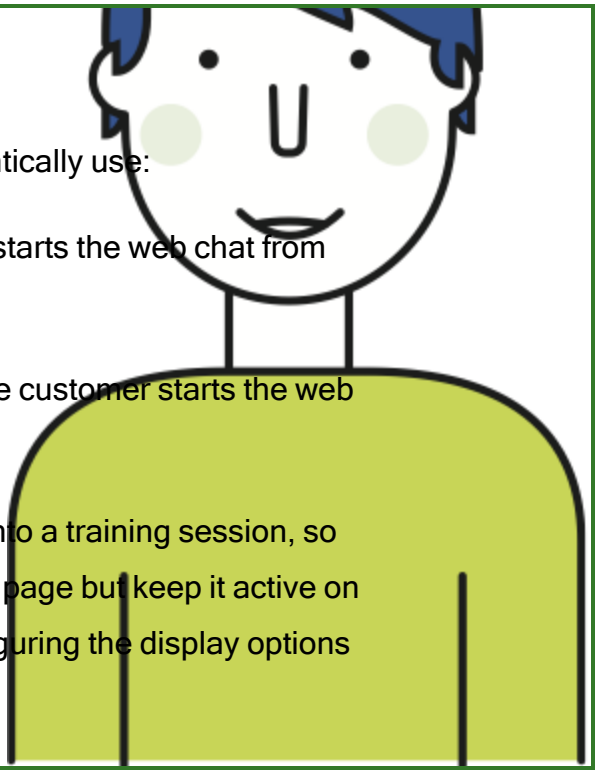
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automatically open.

5. Click  .

9.10.6.6 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.

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The **Display options** page is shown.

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

9.10.7 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 723.

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**.

9.10.8 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.

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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

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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.

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9.10.9 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.

9.10.10 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.

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- 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.

9.10.11 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*.

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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 710.

9.10.11.1 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  .

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9.10.11.2 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.

9.10.11.3 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**.

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9.10.12 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.

9.10.12.1 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  .

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9.10.12.2 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  .

9.10.12.3 Deleting a Time

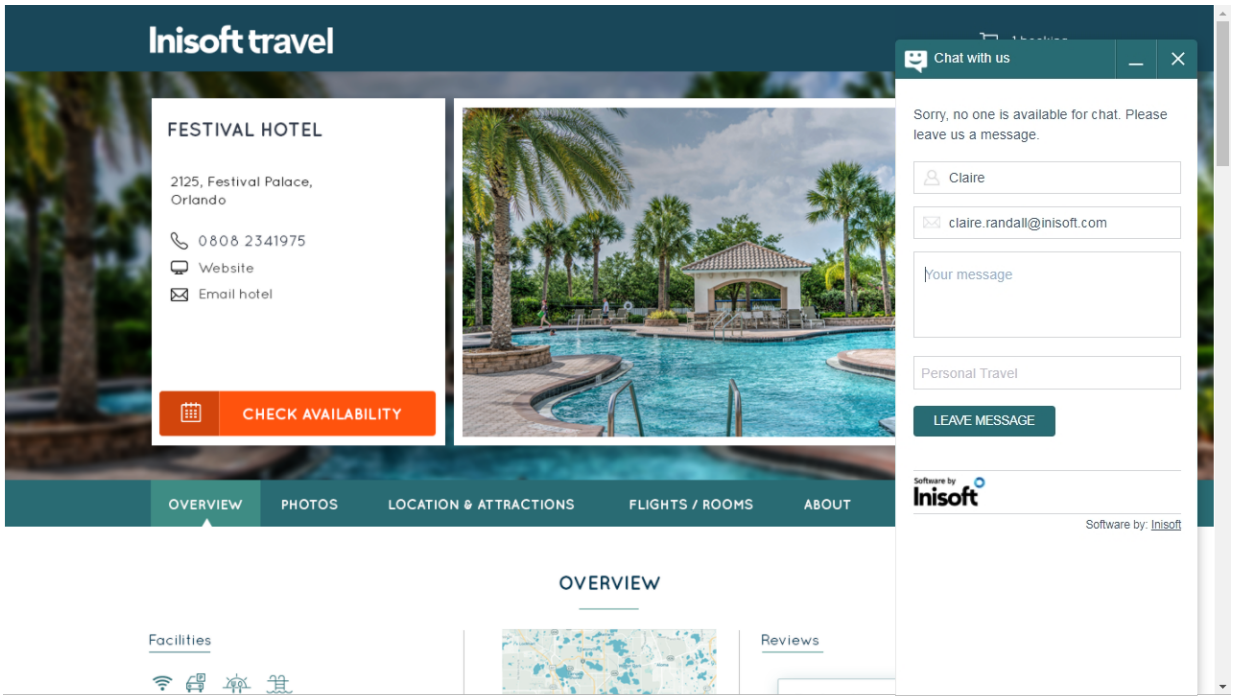
To delete a day and time that you have scheduled for your web chat to be available, follow these steps:

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**.

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9.10.13 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.

9.10.14 Styling Your Web Chat

Syntelate Studio offers lots of options for styling how your web chat will look on your website.

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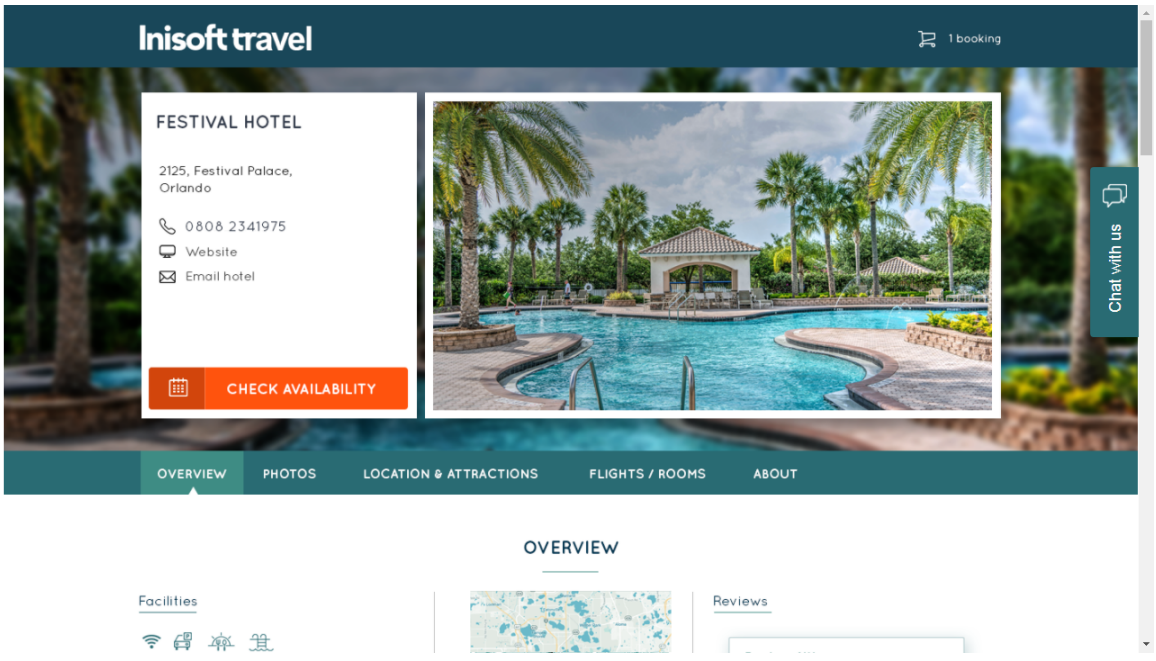
9.10.14.1 Setting the Position

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.



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To set the web chat position, follow these steps:

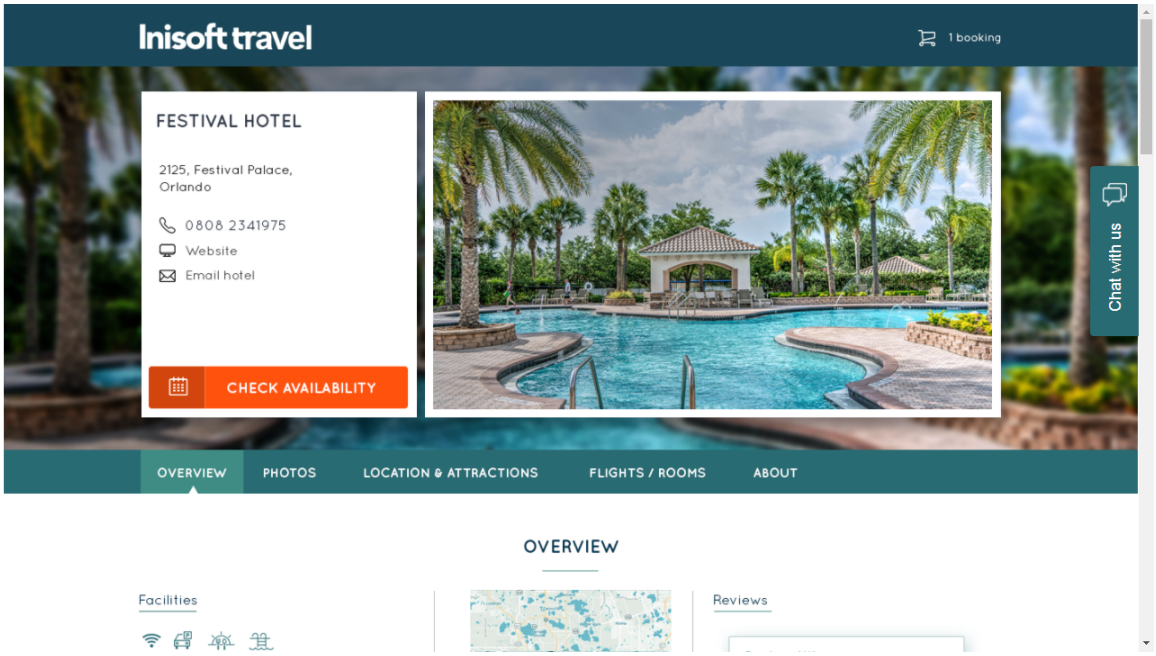
1. From the **Web Chat configuration** home page, click **VIEW** for the web chat that you want to edit. The **Web Chat** page is shown.
2. In the **Web Chat details** section, click  . The fields are unlocked for editing.
3. In the **Position** dropdown, select the position for the web chat.
4. Click  .

9.10.14.2 Setting the Title

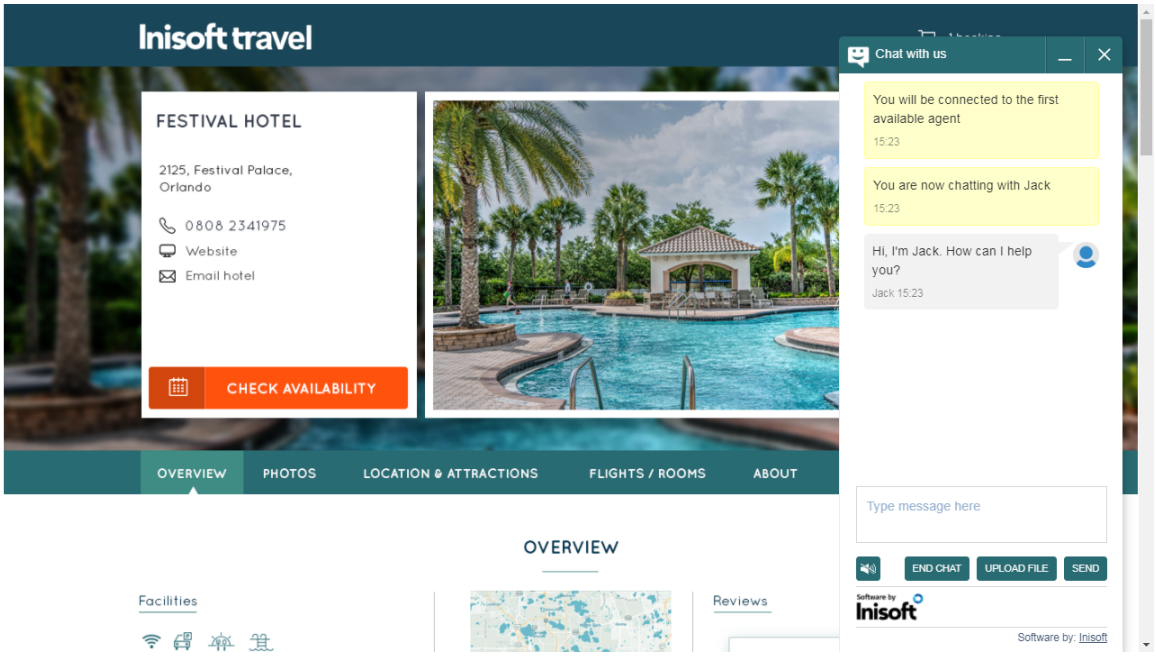
You can set the title of your web chat.

> **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.

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During a web chat, the title is also displayed at the top.



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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  .

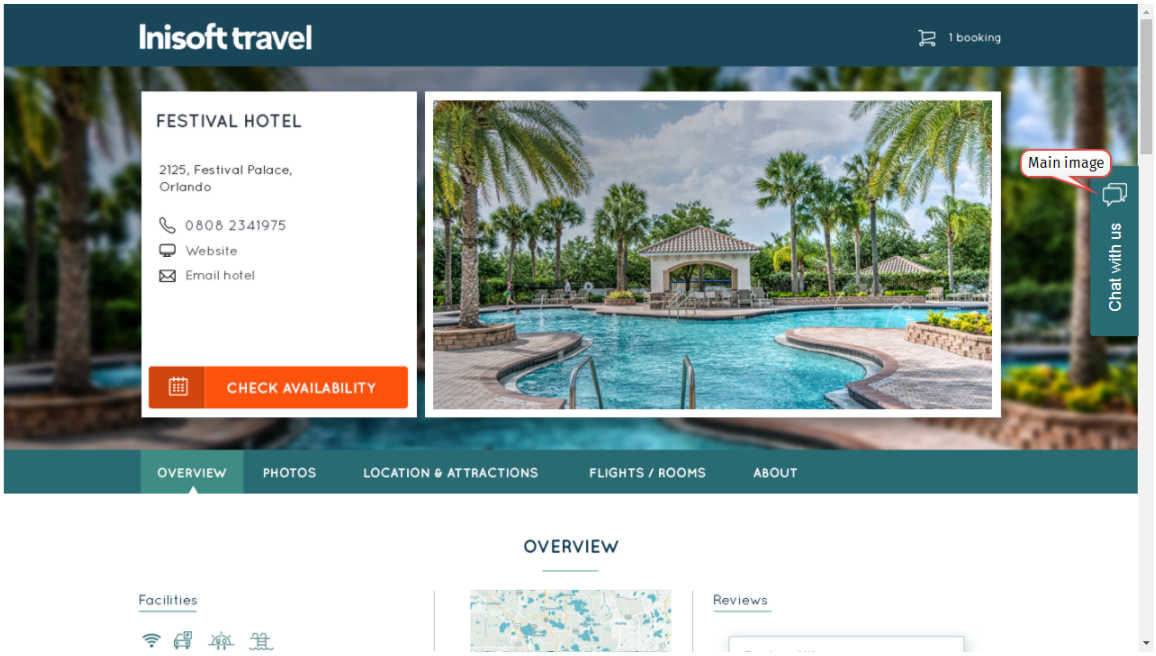
9.10.14.3 Setting the Images

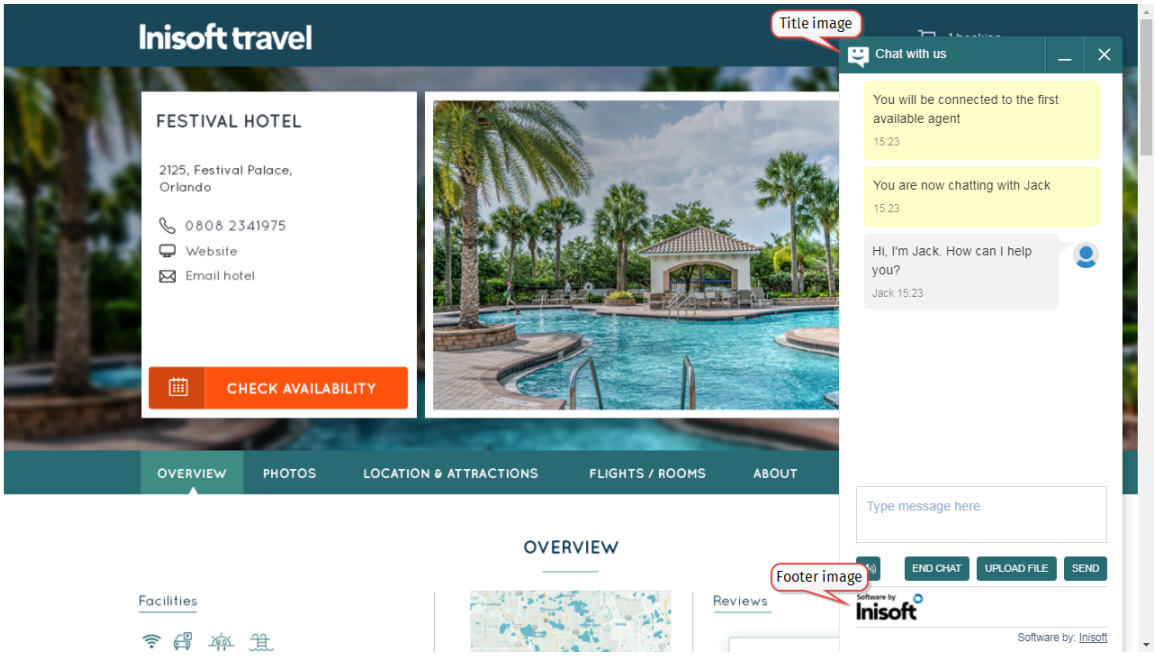
Syntelate Studio lets you set three different images for your web chat:

- Main image
- Title image
- Footer image

> **EXAMPLE**
>
> The following screenshots show the images that Inisoft Travel have set for their web chat.

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Note: If you wish, you can also set for no images to be used.

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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.

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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  .

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9.10.14.4 Setting the Web Chat Color

You can set the color for your web chat. This color is used for:

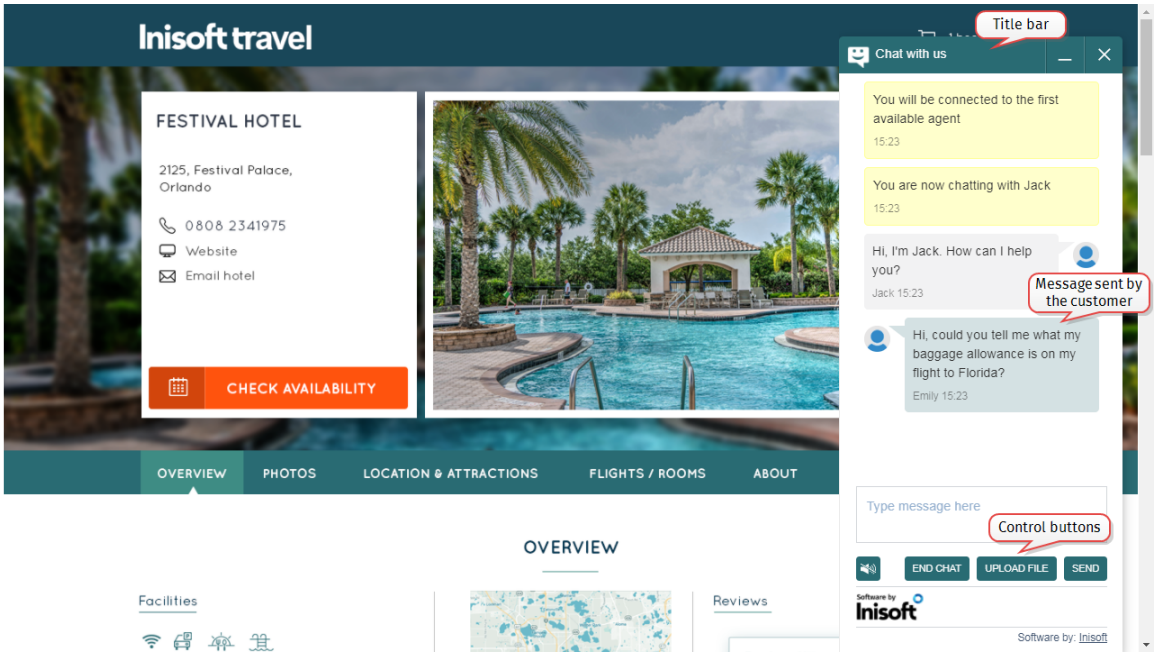
- The button that the customer clicks to start the web chat
- The title bar
- The control buttons (for example, **START CHAT** and **SEND**)
- Customer messages

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).

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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  .

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9.10.14.5 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  .

9.10.14.6 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.

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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

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CSS selector	HTML element
	(when web chat is open)
#inisoftChatClientContent	div for the chat interface (when web chat is open)

4. Click  .

9.11 Worklist Exporter

Use the **Worklist Manager Exporter** tile of Syntelate Studio to export data from the INTERACTION_X table of a universe.

9.11.1 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.

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9.11.2 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.

9.11.3 Tasks

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

9.11.4 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.

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9.11.4.1 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  .

9.11.4.2 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.

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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  .

9.11.4.3 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  .

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> **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**.

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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  .

9.11.4.4 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.

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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.

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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  .

9.11.4.5 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  .

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9.11.4.6 Step 6 - Export Schedule

> **Note:** This step applies to scheduled exports only.

To define when the export should be run, follow these steps:

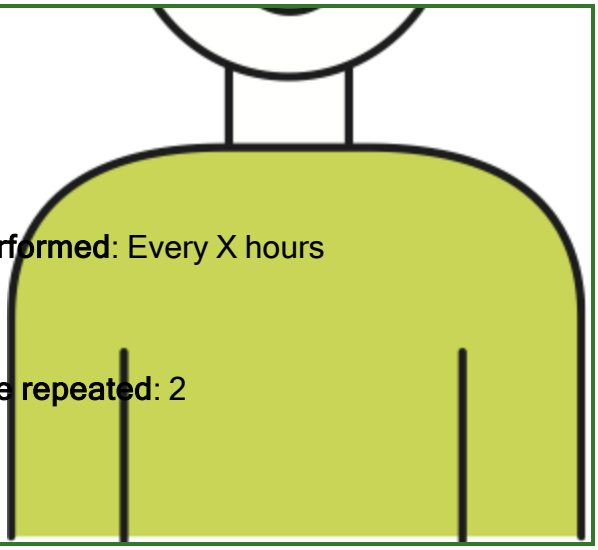
1. In the **When should the export be performed** dropdown, select whether the export should be performed once / **Every X second(s)** / **Every X minute(s)** / **Every X hours(s)** / **Every X day(s)** / **Every X week(s)**.
2. If you selected **Every X …(s)** for **When should the export be performed**, 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.

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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 753.

When you're done, click  .

9.11.4.7 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.

9.11.5 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.

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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.

9.11.6 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**.

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> **Tip:** For instructions on how to configure an export, see Adding an Export on page 742.

9.11.7 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.

9.11.8 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 672.
>
> For more information, see document *Syntelate XA - Managing Studio*.

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9.11.8.1 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**.

9.11.8.2 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**.

9.11.8.3 Deleting an Email Address

To delete an email address, follow these steps:

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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**.

9.11.9 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  .

9.12 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.

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9.12.1 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.

9.12.2 Examples

Inisoft Travel import interaction records into Syntelate XA based on customer activity on the Inisoft Travel website.

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9.12.2.1 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.

9.12.2.2 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.

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9.12.3 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.

9.12.4 Tasks

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

9.12.5 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.

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9.12.5.1 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

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imports, see More about JSON Imports on page 772.

6. Click  .

9.12.5.2 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  .

9.12.5.3 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.

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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.

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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.

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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  .

9.12.5.4 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  .

9.12.5.5 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:

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- **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.

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> **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  .

9.12.5.6 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*.

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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  .

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9.12.5.7 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**.

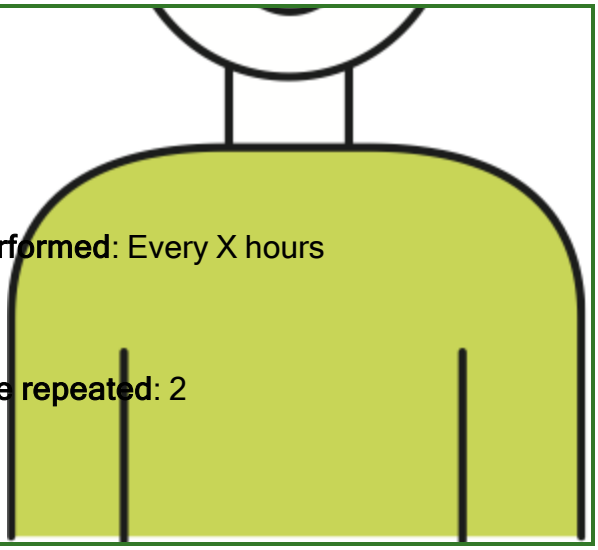
2. If you selected **Every X …(s)** for **When should the import be performed**, then in the **How often should the import be repeated** box, type a number representing the X.

   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.

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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 770.

When you're done, click  .

9.12.5.8 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.

9.12.6 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.

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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.

9.12.7 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**.

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> **Tip:** For instructions on how to configure an import, see Adding an Import on page 758.

9.12.8 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.

9.12.9 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 672.
>
> For more information, see document *Syntelate XA - Managing Studio*.

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9.12.9.1 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**.

9.12.9.2 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**.

9.12.9.3 Deleting an Email Address

To delete an email address, follow these steps:

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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**.

9.12.10 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  .

9.12.11 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 ] }
```

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9.12.11.1 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 758.

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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" }
 ]
}
```

9.12.11.2 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.

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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.

9.12.11.3 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

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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 770.

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