

# Bulk Queue Change

The screenshot shows the Noetica SYNTHESYS™ CAMPAIGN MANAGER interface. The top navigation bar includes the Noetica logo, the product name, and a user profile for 'brigitte'. The main header for the current page is 'CustomersSP2 (List ID: 187)' with a 'Rename' button. Below the header is a toolbar with icons for List, Organizer, Settings, Timetable, Recycling, Modify, Quotes, and Skills. The left sidebar shows a tree view of workspaces, with 'CustomersSP2' selected. The main content area is titled 'Bulk Queue Change' and has three tabs: 'Bulk Queue Change Jobs', 'Schedules', and 'Schedule Runs'. The 'Bulk Queue Change Jobs' tab is active, showing a table with two rows: 'Special Orders' and 'New Orders'. Each row has a 'Run' button, an 'Edit' button, a 'Schedule' button, and a 'Delete' button. A 'Refresh' button is located at the top right of the table. A tooltip 'Schedule Bulk Queue Change' is visible over the 'Schedule' button for 'New Orders'. A '+ Create New Job' button is located at the top left of the table area.

### Schedule Bulk Queue Change Step 1/1

**Recurrence Pattern**

Regularly within each day      Every  days

Daily

Weekly

Monthly

---

**Range of Recurrence**

No End Date

End Date:

Start Date:

End Date:

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The information contained in this document may change. We may issue revisions from time to time to advice of changes or additions. We operate a policy of constantly improving and enhancing our application software. There is a possibility therefore that the format of the screen display and printed output shown in this documentation may differ slightly from that provided in the software. It is our policy to update this documentation whenever a major release of software takes place.

Synthesys™ Bulk Queue Change

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## BULK QUEUE CHANGE

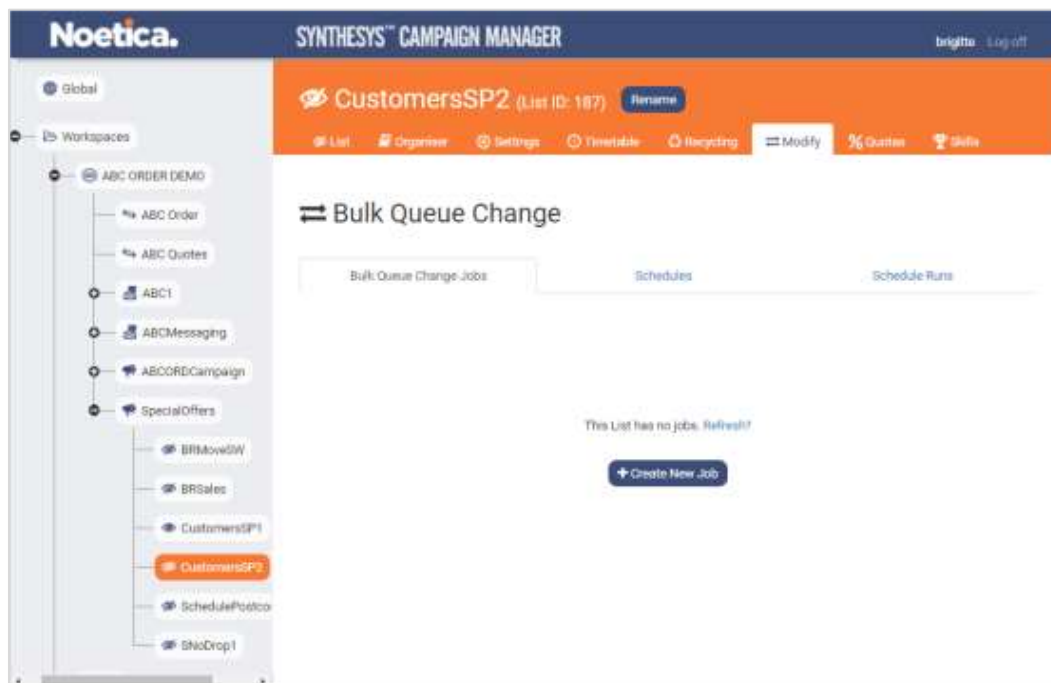
The Bulk Queue Change option, available at call list level, allows users to manipulate queued items at list level, and to apply filters to manipulate queue entries based on Entity data. The changes can be applied instantly, or you can set up schedules to run the bulk queue changes at specified intervals.



The filters to define data segments within an Entity/ CRM are created in the Filter Designer, accessed via the **Filters** tab at workspace level.

### Creating a Bulk Queue Change Job

- Select the call list that you wish to use for your bulk queue change.
- Click the **Modify** (Bulk Queue Change) tab in the list dialog.



- Next, click the **+Create New Job** button in the Bulk Queue Change dialog.
- Enter a name for the bulk queue change job into the **Job name** dialog.

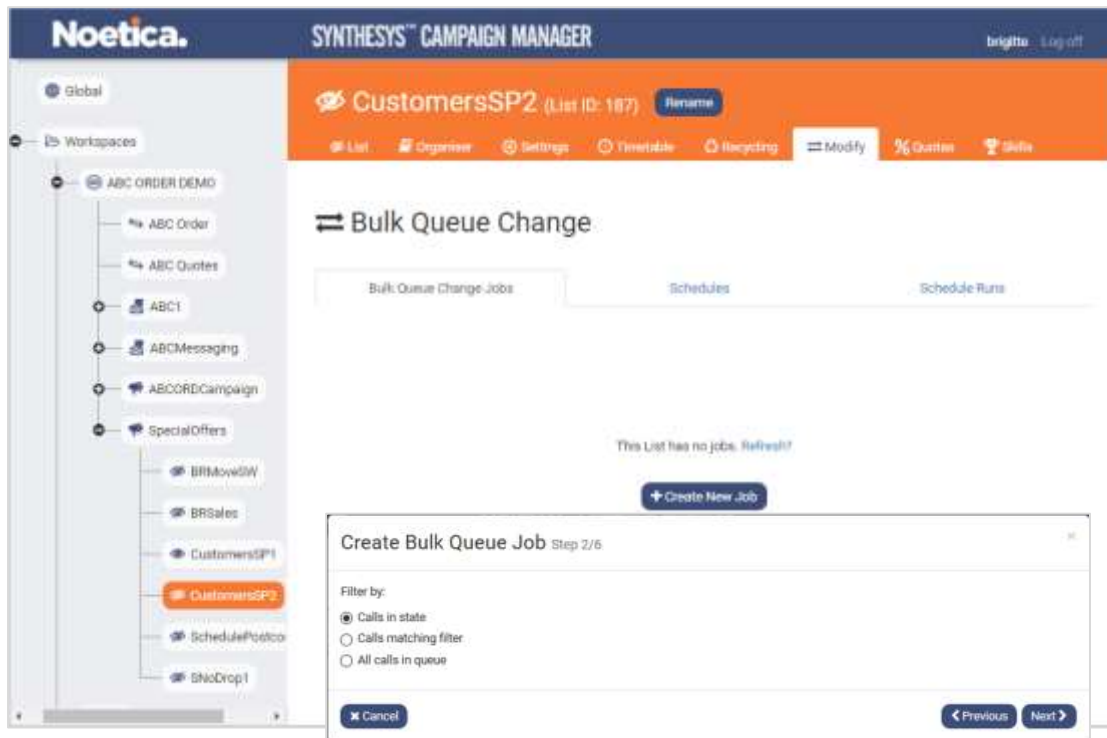


- Click Next, to move to the next step of defining your bulk queue changes.

## BULK QUEUE CHANGE OPTIONS

The options available for your bulk queue change include:

- Calls in state.
- Calls matching filter.
- All calls in queue.



Depending on your selection, you can manipulate the queue entries for a selected call list, or you can apply existing filters based on Entity properties to manipulate queue items.

Options	Description
Calls in state	Allows users to select call states and manipulate queue entries for the selected list, e.g., changing sleeping calls to queued, or assigning an agent to scheduled calls.
Calls matching filter	Allows users to apply existing filters to manipulate queue entries based on Entity properties.
All calls in queue'	Allows users to manipulate all queue entries in a selected list.



When moving through the pages, use the **Next>** button to navigate to the next page, *the* **<Previous** button to move back to the previous page and **Cancel**, to abandon an action without saving the changes.

## Calls in State.

If you wish to manipulate queued items for a selected call list

- Select the **Call in state** option.



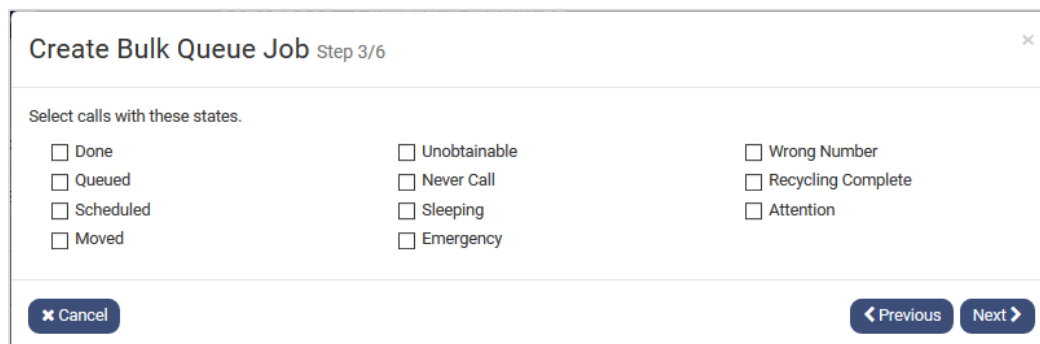
**Create Bulk Queue Job** Step 2/6

Filter by:

- Calls in state
- Calls matching filter
- All calls in queue

Buttons: **Cancel**, **Previous**, **Next**

- In the next page, select the call state(s) that you wish to manipulate.



**Create Bulk Queue Job** Step 3/6

Select calls with these states.

<input type="checkbox"/> Done	<input type="checkbox"/> Unobtainable	<input type="checkbox"/> Wrong Number
<input type="checkbox"/> Queued	<input type="checkbox"/> Never Call	<input type="checkbox"/> Recycling Complete
<input type="checkbox"/> Scheduled	<input type="checkbox"/> Sleeping	<input type="checkbox"/> Attention
<input type="checkbox"/> Moved	<input type="checkbox"/> Emergency	

Buttons: **Cancel**, **Previous**, **Next**

- Next, select the change that is to take effect.



**Create Bulk Queue Job** Step 4/5

What do you want to do with these calls?

- Assign to agent
- De-assign agent
- Change state
- Delete
- Change priority

Buttons: **Previous**, **Next**

- The options include *Assign to agent* (only sleeping & rescheduled outcomes), *Change State*, *De-assign agent*, *Delete* or *Change priority*.

Depending on your selection, the following pages of the bulk queue change job will provide the options that you can use for your Calls in State queue manipulation.

Please see the next pages for more information.

## Assign to Agent

If you wish to use the bulk queue change to assign rescheduled and/ or sleeping calls to a particular agent

- Select **Assign to agent** in step four of your bulk queue change.



Any outcomes other than rescheduled or sleeping that may have been selected will be ignored as they can't be assigned.



The screenshot shows a dialog box titled "Create Bulk Queue Job Step 4/6". It contains a question "What do you want to do with these calls?" and a dropdown menu with "Assign to agent" selected. There are "Cancel", "Previous", and "Next" buttons at the bottom.

- In the next page, select the agent that you wish to assign to the currently rescheduled or sleeping calls.



The screenshot shows a dialog box titled "Create Bulk Queue Job Step 5/6". It contains a question "Which agent do you want to assign the calls to?" and a list of agents: "ana", "Admin", "ana", "Anonymous", "Automatic", "ben", "brigitte", "chris", and "danny". The "ana" agent is selected. There are "Previous" and "Next" buttons at the bottom right.

In the last page of your bulk queue change job, select

- **Save job and run now**, to apply the changes immediately.
- **Save job so it can be scheduled later**, to set up a schedule for the bulk queue change later, to run at specified intervals.



The screenshot shows a dialog box titled "Create Bulk Queue Job Step 7/7". It contains a warning message: "Run now or schedule later. The change you requested would affect a large number of records (18112) and might have a detrimental impact on system performance. You may wish to consider scheduling this to run out of contact centre normal operating hours." Below the message are two radio button options: "Save job and run now" (selected) and "Save job so it can be scheduled later". There are "Cancel", "Previous", and "Finish" buttons at the bottom.



If you create a Bulk Queue Change job that will affect more than 1000 records, a message will inform you that this might impact on system performance and that it may be preferable to save the job and schedule it to run out of contact centre normal operating hours.

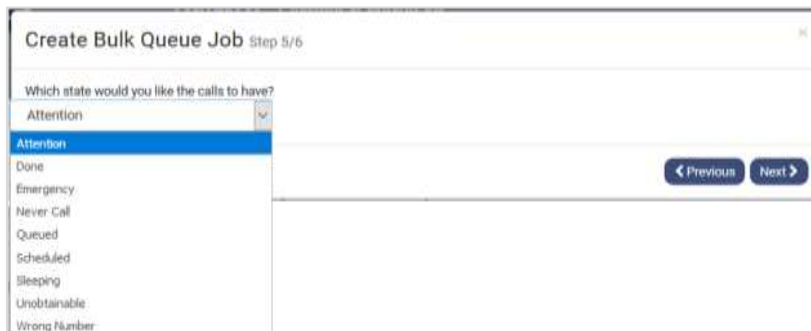
## Change State

To change the current queue state of selected queue items in the list to another state

- Select the **Change State** option in step four of your bulk queue change.



- In the next page, select the state that you wish to apply.
- You can change the call state to *Attention; Done; Emergency (Priority); Never Call; Queued; Scheduled; Sleeping; Unobtainable* or *Wrong Number*, as required.



If you select *Sleeping*, you will be prompted to specify the sleeping period.



If you select *Scheduled*, you will be prompted to specify the retry time and latest due time.



In the final page of your bulk queue change, you can apply the changes immediately, or you can save your bulk queue change job and create a schedule for later.




If you create a Bulk Queue Change job that will affect more than 1000 records, a message will inform you that this might impact on system performance and that it may be preferable to save the job and schedule it to run at a more convenient time.



## Change Priority

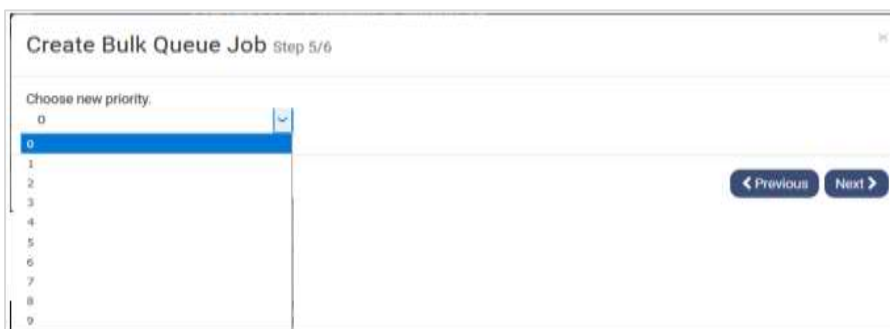
To change the call priority of selected records or call outcomes

- Select **Change Priority**



The screenshot shows a dialog box titled "Create Bulk Queue Job Step 4/6". Below the title, it asks "What do you want to do with these calls?". A dropdown menu is open, showing "Change priority" as the selected option. At the bottom, there are three buttons: "Cancel", "Previous", and "Next".

- Next, choose the call priority that you wish to assign from a range between 0 – 9 (Idle = 0, Low = 1, High = 9).



The screenshot shows a dialog box titled "Create Bulk Queue Job Step 5/6". Below the title, it asks "Choose new priority.". A dropdown menu is open, showing a list of numbers from 0 to 9. The number 0 is highlighted. At the bottom, there are two buttons: "Previous" and "Next".

## De-assign

Select the **De-assign** option if you want to remove the current agent assignment.



The screenshot shows a dialog box titled "Create Bulk Queue Job Step 4/6". Below the title, it asks "What do you want to do with these calls?". A dropdown menu is open, showing "De-assign agent" as the selected option. At the bottom, there are three buttons: "Cancel", "Previous", and "Next".

## Delete Options

Select the **Delete** option, to remove selected queued items from the call list.



The screenshot shows a dialog box titled "Create Bulk Queue Job Step 4/6". Below the title, it asks "What do you want to do with these calls?". A dropdown menu is open, showing "Delete" as the selected option. At the bottom, there are three buttons: "Cancel", "Previous", and "Next".



In the final page of your Bulk Queue Job, you can apply the changes immediately, or if a large number of records are affected, which might impact on system performance, you may prefer to save your bulk queue change job and create a schedule to run out of contact centre normal operating hours.

## Calls matching Filter.

The **Calls matching filter** option, allows you to apply an existing filter based on entity data, to determine which records you wish to include for your bulk queue change.

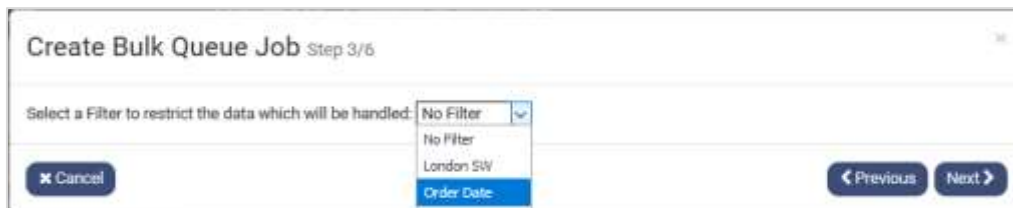


If you have not yet created the filter to specify the relevant data segments that you wish to use, please go to the **Filters** tab at **Workspace** level, and define the filter for your bulk queue change in the Filter Designer.

- In step two of the bulk queue change, select the **Calls matching filter** option.



- Next, choose the filter that you wish to apply.



- In the next page, select the change that is to take effect.
- The options include *Assign to agent* (sleeping & rescheduled outcomes), *De-assign agent*, *Change State*, *Delete*, *Change priority* and *Move to Outbound list*.

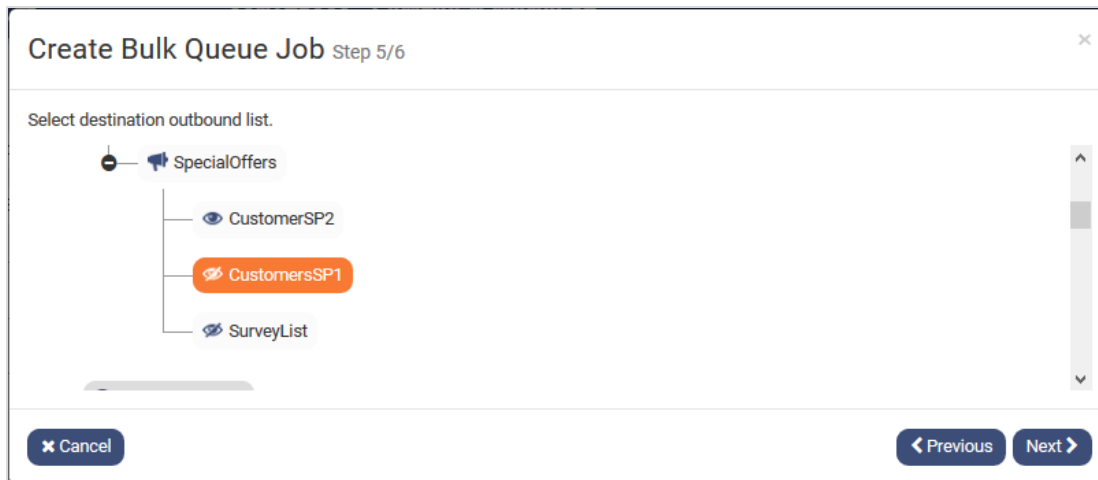


In our example, we want to move selected records from the current call list to another outbound list.



All moved calls, regardless of their current queue state, will be queued and displayed in the target call list as freshly queued calls, with the number of times called set back to zero.

The next page of the bulk queue change will prompt you to select the destination outbound list.



In the final page of the bulk queue change job select

- **Save job and run now**, to apply the changes immediately.
- **Save job so it can be scheduled later**, to set up a schedule for the bulk queue change later, to run at specified intervals.



If you create a Bulk Queue Change job that will affect more than 1000 records, a message will inform you that this might impact on system performance and that it may be preferable to save the job and schedule it to run out of contact centre normal operating hours.

## All Calls in Queue.

The option **All calls in queue** is used to manipulate the state of all queued items in a selected call list.



Please be aware that the **All calls in queue** option will affect the entire call queue, i.e., all queued records in the selected call lists.

- If you are sure that you wish to manipulate all queued records, select **All calls in queue** in step two of the bulk queue change job.



**Create Bulk Queue Job** Step 2/4

Filter by:

- Calls in state
- Calls matching filter
- All calls in queue

Buttons: **Cancel**, **Previous**, **Next**

- In the next page, specify the change that should apply to the entire call queue.
- You can choose to *De-assign agent*, *Change State*, *Delete*, or *Change Priority*.



**Create Bulk Queue Job** Step 3/4

What do you want to do with these calls?

De-assign agent

Buttons: **Cancel**, **Previous**, **Next**

If you select **Change state** or **change Priority**, the next page will prompt you to specify the new state or priority that is to take effect, before moving to the final page.

If you select **De-assign agent** or **Delete**, Next> will move you directly to the final page of the bulk queue change job.

Decide if you want to

- **Save job and run now**, to apply the changes immediately.
- **Save job so it can be scheduled later**, to set up a schedule for the queue change.



**Create Bulk Queue Job** Step 7/7

Run now or schedule later

The change you requested would affect a large number of records (18112) and might have a detrimental impact on system performance. You may wish to consider scheduling this to run out of contact centre normal operating hours.

- Save job and run now
- Save job so it can be scheduled later

Buttons: **Cancel**, **Previous**, **Finish**

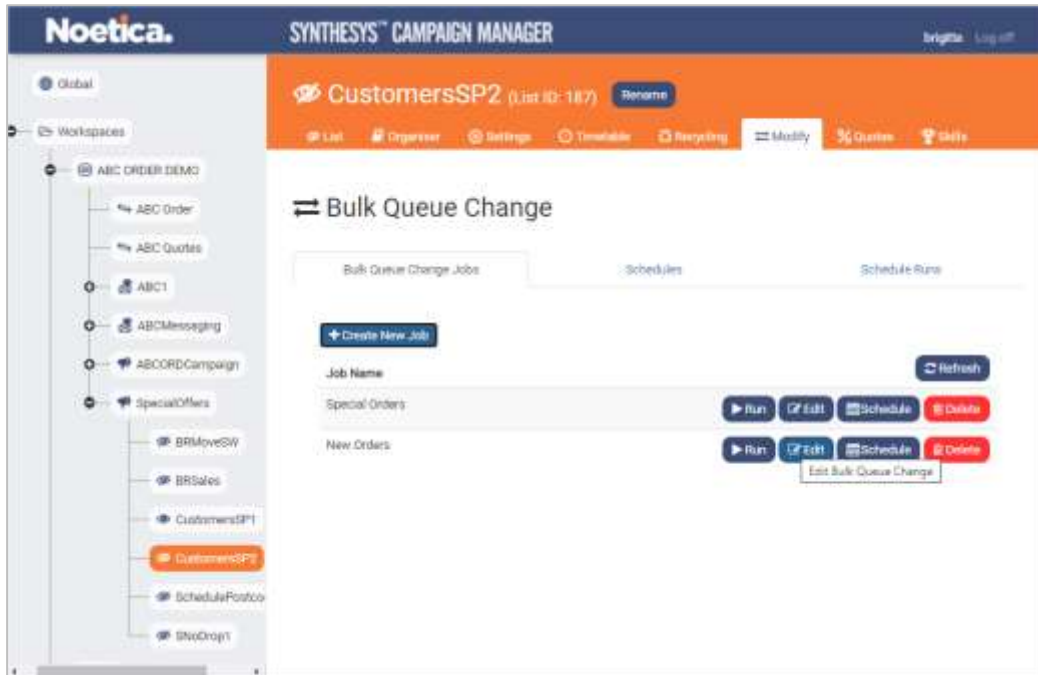


If you create a Bulk Queue Change job that will affect more than 1000 records, a message will inform you that this might impact on system performance and that it may be preferable to save the job and schedule it to run out of contact centre normal operating hours.

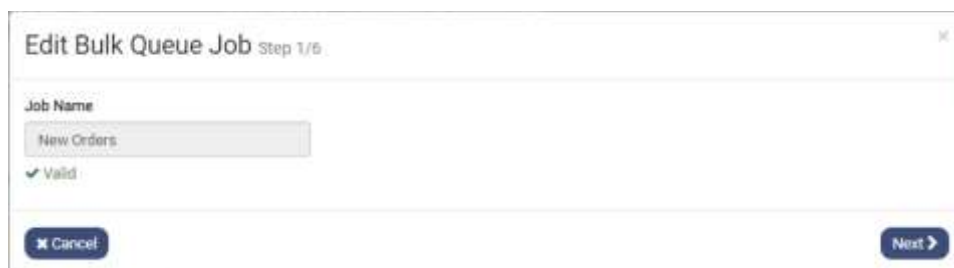
## EDITING BULK QUEUE CHANGE JOBS

If you wish to check or edit an existing bulk queue change job

- Locate the campaign and call list that contains the bulk queue change job that you wish to view or amend.
- Select the **Modify** (Bulk Queue Change) tab at the top right of the list dialog.



- Click the **Edit button** for the existing queue change job.
- Move through the pages of the **Edit Bulk Queue Job** wizard, where you can view or change any existing filters, call states or outcomes, as required.

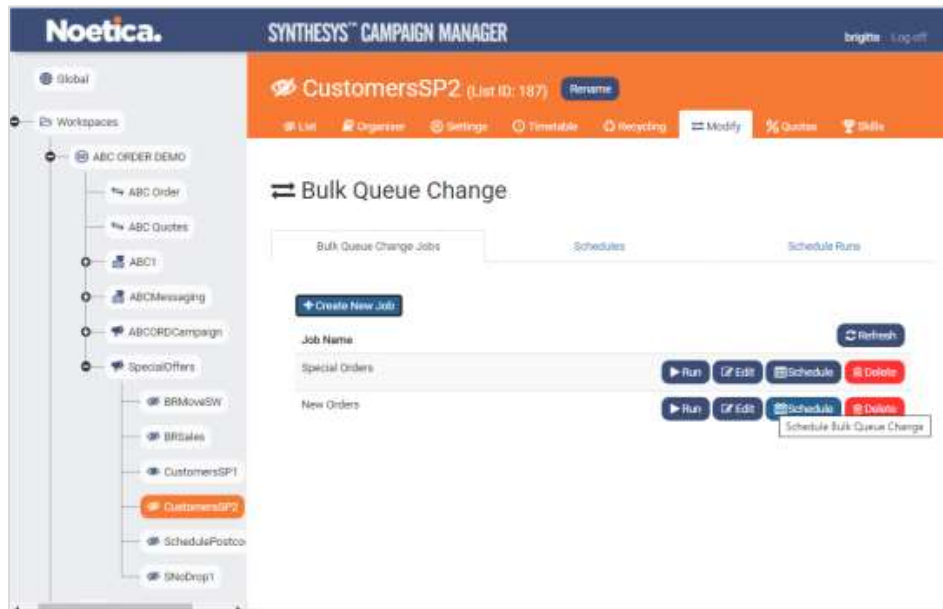


Please see the next page for information about scheduling a Bulk Queue Change.

## SCHEDULING BULK QUEUE CHANGES

Bulk queue change jobs are scheduled at list level.

- Move your mouse pointer over the bulk queue change job that you wish to run and click the **Schedule** button.



You can now decide the frequency for your bulk queue change.

- In the **Recurrence Pattern** section, select either Regularly within each day, Daily, Weekly or Monthly and then specify further details, as required.
- In the **Range of Recurrence** section, select a **start date** for the schedule.
- You can then specify an *End Date* or continue to run your schedule indefinitely by selecting the *No End Date* option.



The screenshot shows the 'Schedule Bulk Queue Change' dialog box, Step 1/1. It has a close button (X) in the top right corner. The 'Recurrence Pattern' section has four radio buttons: 'Regularly within each day' (with an input field for 'Every 1 days'), 'Daily' (selected), 'Weekly', and 'Monthly'. The 'Range of Recurrence' section has two radio buttons: 'No End Date' (selected) and 'End Date'. Below these are two date pickers: 'Start Date: 25 Feb 2021 : 15:38' and 'End Date: 25 Feb 2021 : 15:43'. At the bottom, there are 'Cancel' and 'Create Schedule' buttons.

- To action the **bulk queue change**, click the **Create Schedule** button.

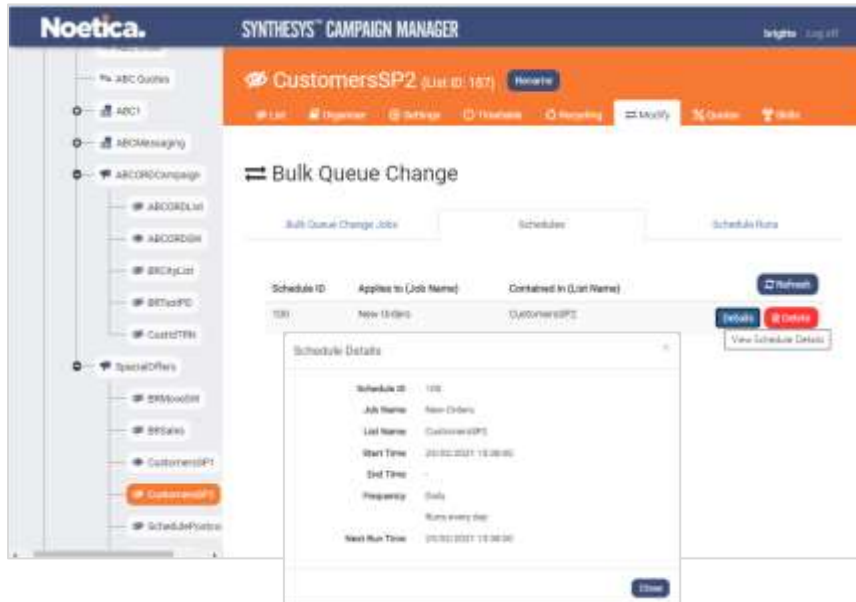


When you try to run or schedule a Bulk Queue Change job that will affect more than 1000 records, a message will inform you that this might impact on system performance and that it may be preferable to schedule the job to run out of contact centre normal operating hours.

## Viewing Bulk Queue Change Schedules

In the **Bulk Queue Change** dialog, at list level

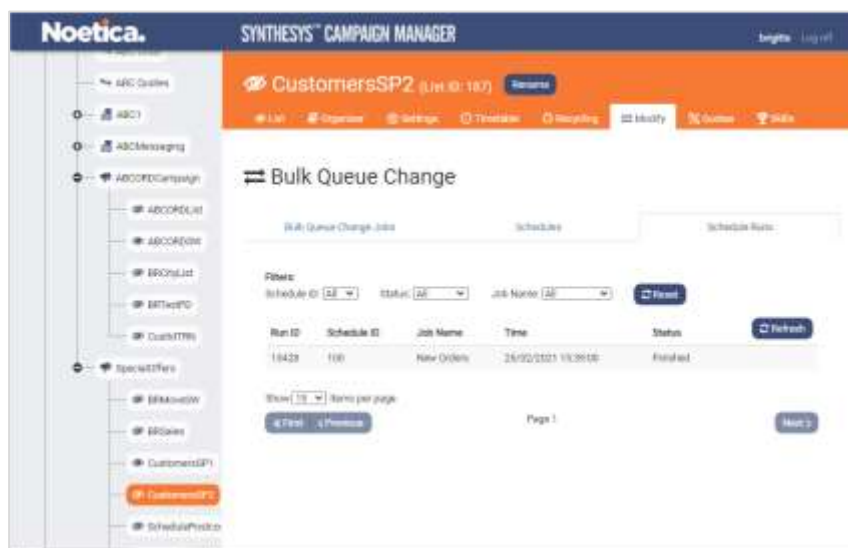
- Select the **Schedules** option and move your mouse pointer over the schedule that you wish to view, to show the *Details* and *Delete* buttons.



- Click the **Details** button to open the Schedule Details page, which displays a summary of the selected schedule.

## Viewing Bulk Queue Change Schedule Runs

- Select the **Schedule Runs** option in the Bulk Queue Change dialog.



- Using the **Schedule ID**, **Status** and **Job Name** drop down menus, you can select and display specific schedule runs. Clicking the Refresh button will update the list.