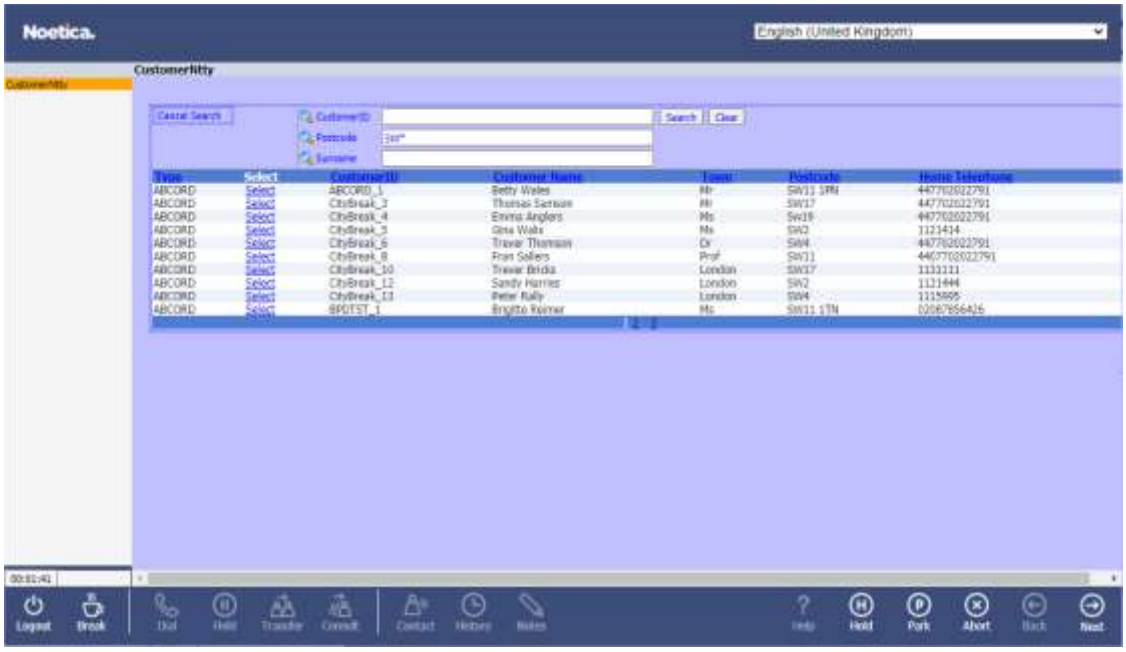
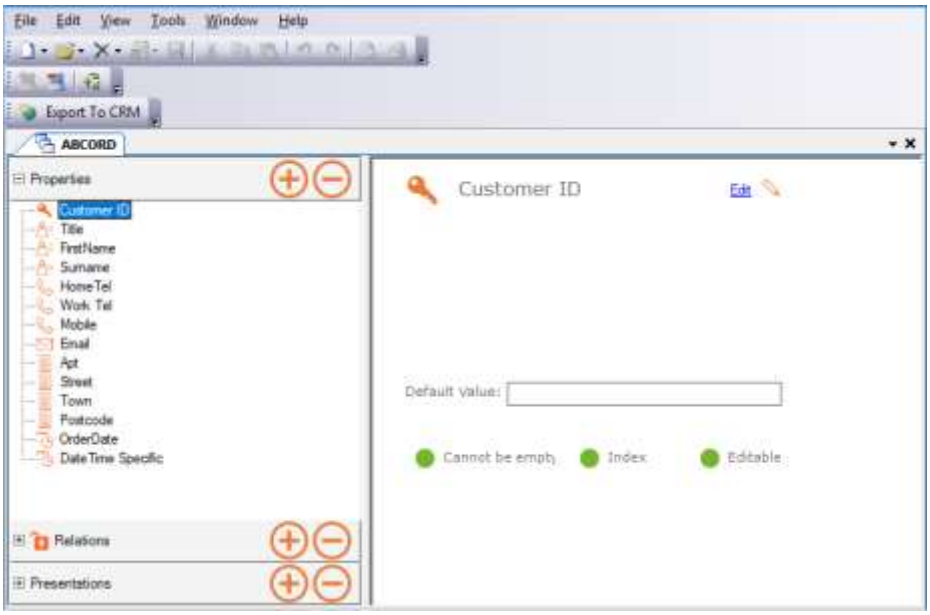
CRM ENTITIES





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CRM Entities

Last updated June 2021

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ENTITIES

Entities are used to store information and to capture data from various actions performed during the life cycle of a contact, a customer, or a product.

The Primary Entity is generally linked to the Workspace in the Synthesys™ Interaction Studio, as it typically contains the essential customer details that are to be used when creating and managing campaigns and call lists.

Users can then create further Entities with information about products, orders or repairs that can be linked and launched in the associated scripted apps, with corresponding entries being held in the *Main Customer History* table.

Entities are created in the Synthesys™ Interaction Studio, a powerful integration tool that allows contact centre administrators to create Entities and to set up Workspaces under which to build the Scripted Apps that will support the individual client campaigns.

In this document we will give a brief introduction to logging into the Synthesys™ Interaction Studio, and then show in detail how **CRM Entities** are created using the Properties, Relations and Presentations Editors, and how the Ntty control is used in Scripted apps to display Entity data to agents at run time in the Synthesys™ Agent Portal.

For a more detailed description of the Synthesys™ Interaction Studio und all aspects of creating workspaces and designing scripted apps, please see the module document Scripted App Design.

For further information about agents handling calls, please see the module document Agent Portal.

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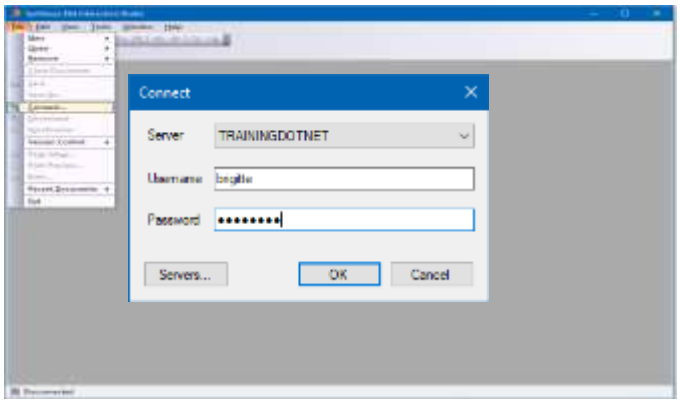
Logging into the Synthesys™ Interaction Studio

Entities are created using the **Entity** module in the Synthesys™ Interaction Studio.

- To open the Interaction Studio, double click the Synthesys™ IDE icon on your desktop.

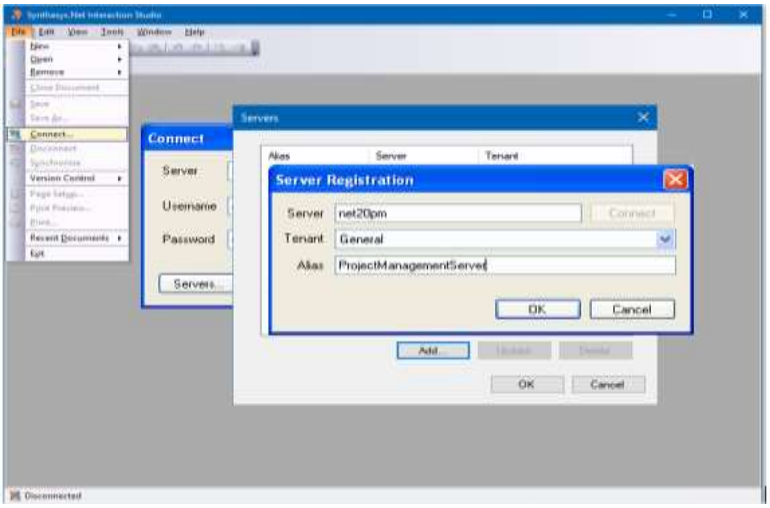
Connecting to the Server and synchronisation

- Go to **File / Connect** and select the relevant Synthesys™ server.
- Enter your **Username** and **Password**, as provided by your system administrator.



If you are logging in for the first time, and the name of the server is not yet displayed:

- Click the **Servers** button in the Connect dialog.
- In the Servers dialog now displayed, click the **Add** button.
- Enter the name of the relevant server and click **Connect**. When connected, select **Tenant** "General", and enter an appropriate **Alias** name for the server.



- Click OK, then enter your **Username** and **Password** into the fields displayed.
- Next, go to **File / Synchronise**, or click the Synchronise icon, to synchronise the local workstation with the server. When the message shows '**Synchronisation Complete',** click **OK** to exit the *Synchronisation Status* screen.

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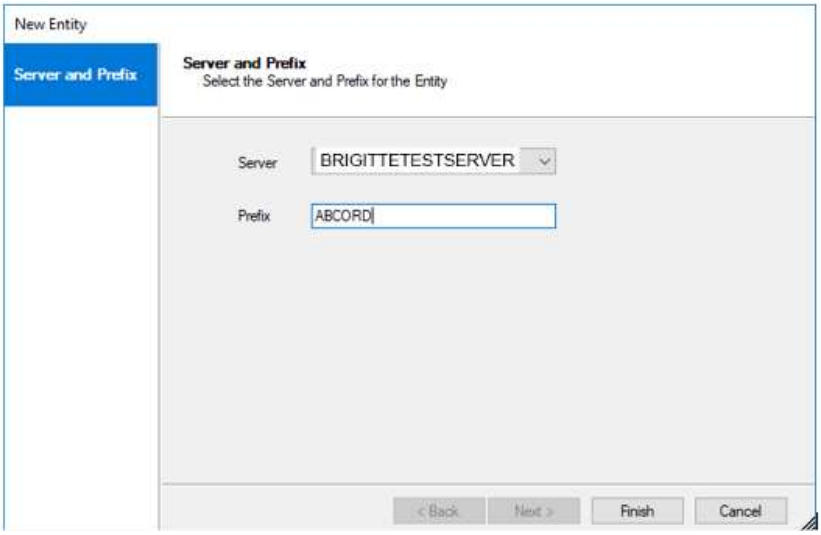
CREATING A NEW ENTITY

Entity tables are created using the **Entity** option in the Synthesys™ Interaction Studio.

- To create a new Entity, go to **File – New – Entity**.

- Select the name of the server on which to create the new Entity.
- Enter a name for the Entity into the **Prefix** field.



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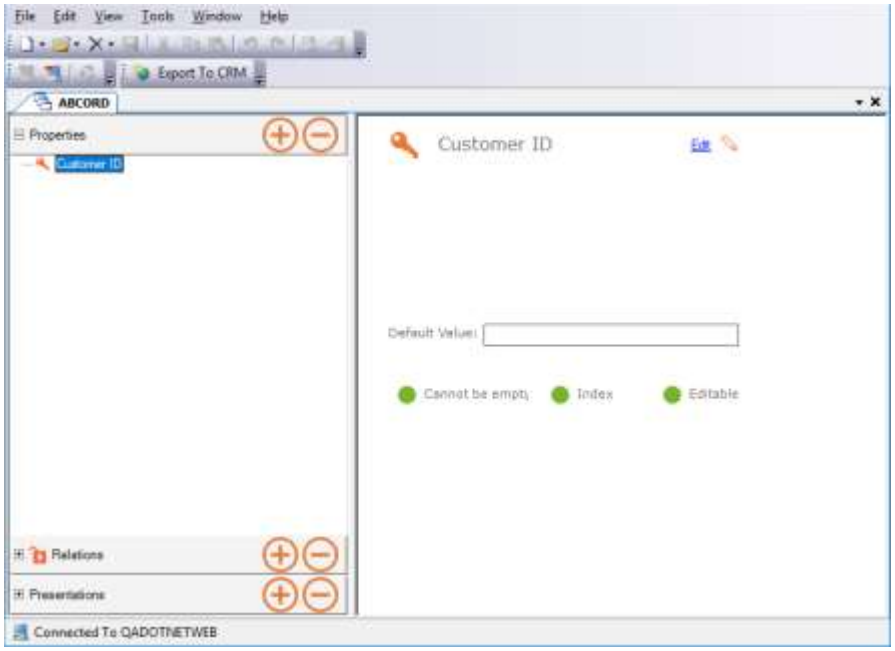
Entity Design

The three main categories in the Entity Structure consist of the **Properties, Relations** and **Presentations** editors.



Option	Description
Properties	The Property Editor is used for adding and editing Entity data fields.
Relations	The Relations Editor is used to determine the way the current Entity relates to other entities, either as parent (down) or child (up).
Presentations	The Presentations Editor is used to define how an Entity is presented at run time.

Please see the next page for a more detailed description.

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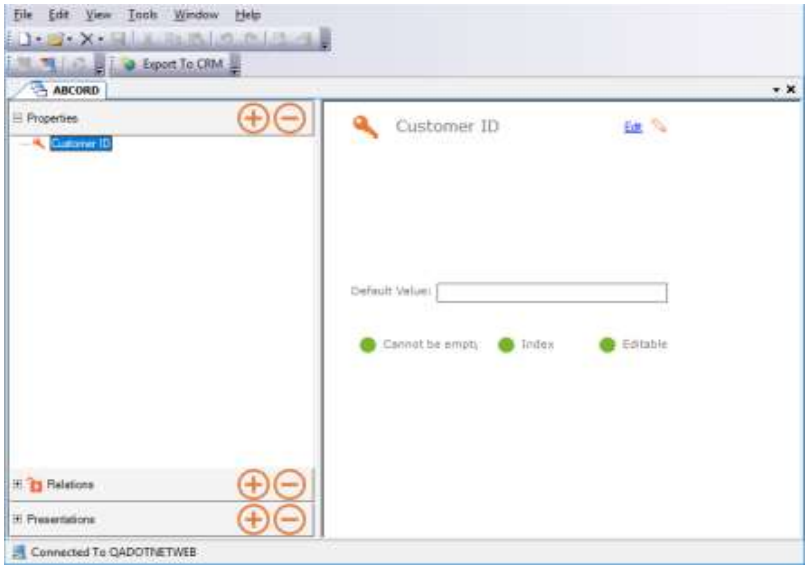
ENTITY PROPERTIES EDITOR

In the **Properties** Editor you can create and edit your Entity table, adding all relevant fields, as required, to reflect the data fields in the customer file that you wish to import.

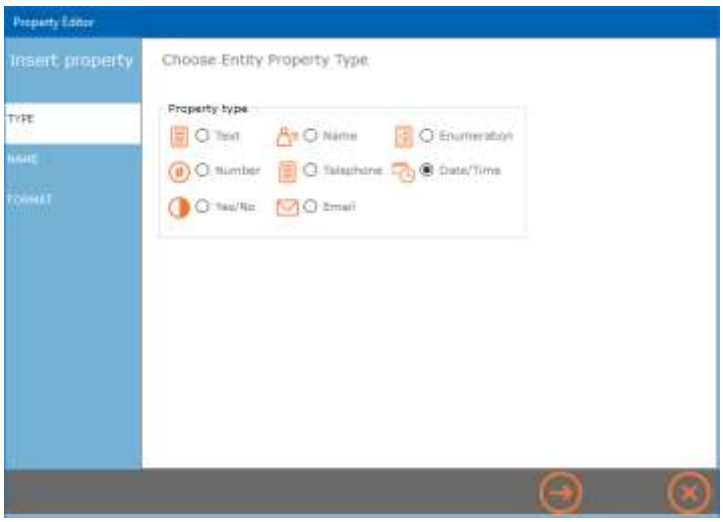
Please note that only letters, digits, or underscore are acceptable entries as Entity Property field names.

Adding Fields and Data Type

- To add a new field to your Entity table, press the button in the **Properties** section to launch the **Property Editor**.



- Select the data type for the field that you wish to add, then use the button to move to the next page of the Entity Property Editor.



To enable CTI integration, ensure that you always use Telephone fields to capture the customer's telephone numbers, and the Email field to capture the email address.

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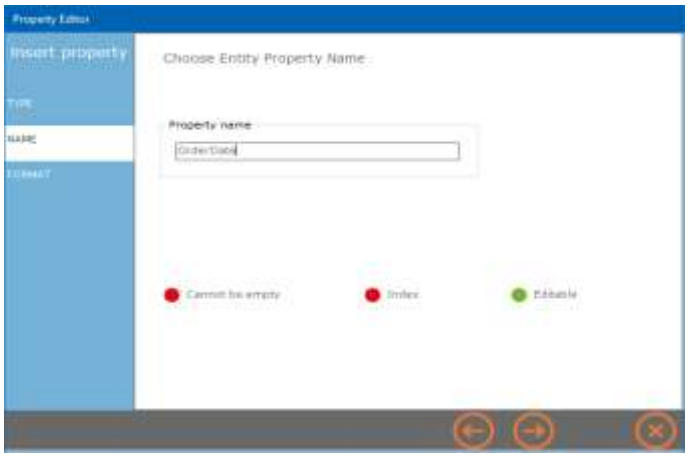
Property Name and Settings

When entering a name in the Property Name field, please do not use any characters apart from letters, digits, or an underscore.

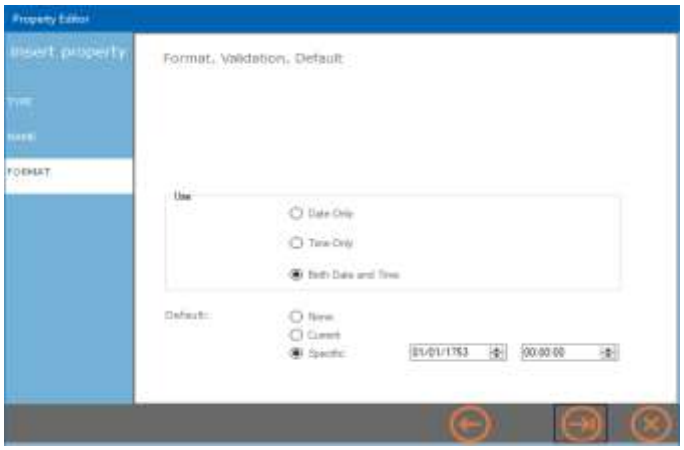
- In the Entity Property Name section, enter the name for the new Entity filed.
- Next confirm the available **settings** “Cannot be empty”, ”Index” and “Editable” as required, by clicking on the option. A green dot shows that the option is activated.



Format, Validation and Default Values

In this page you can specify further details to determine how a data field is presented.

- If required, you can set a default value for a text field, which would be added to a new record, if no other value is specified.
- Using a Date/ Time property, as in our example below, you can choose to display a current or specific date or time (or date and time).



- Click the button to add the field to your Entity table.
- To move back and forward through the pages, use the buttons.
- To close the Property Editor wizard without saving the changes, click the button.
- Repeat the steps described to add further fields to your Entity table, as required.

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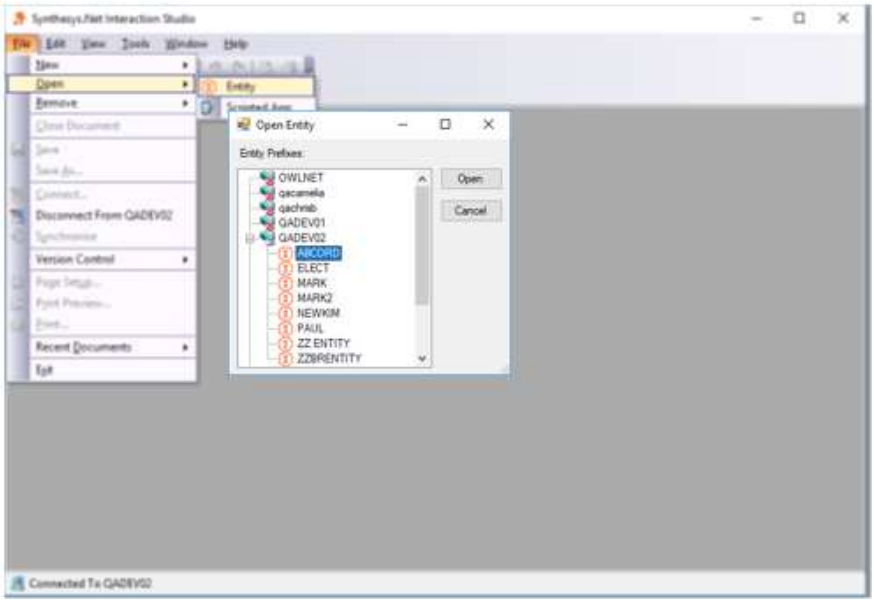
Editing existing Entity Fields

To edit fields of an existing entity table

- Open the Interaction Studio.
- Go to **File – Open – Entity** and select the relevant Entity prefix.
- Click the **Open** button and Y**es** to check out the entity for editing.



- Expand the **Properties** tree and select the field that you wish to edit.

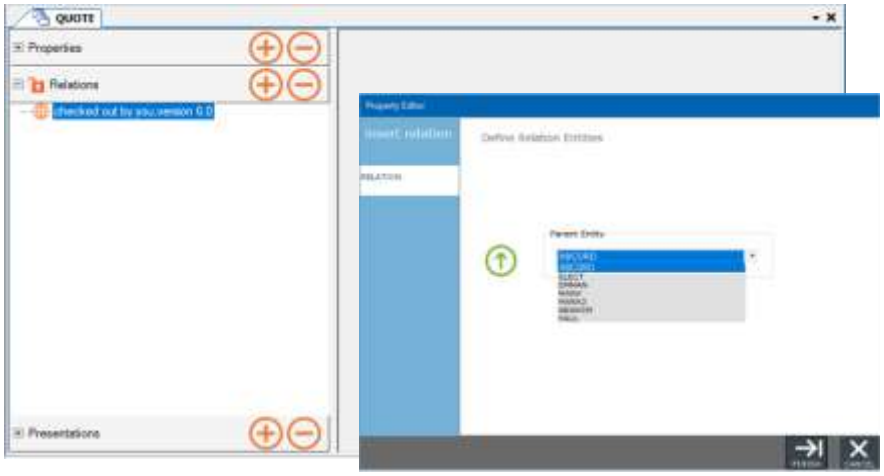
- Click the Edit link in the dialog on the right.
- Make any changes, as required, moving through the pages of the Property Editor.
- Use the ⊕ button to add new fields, or the ⊖ button to remove a selected field.
- To close the Property Editor wizard without saving the changes, click the button.

ENTITY RELATIONS EDITOR

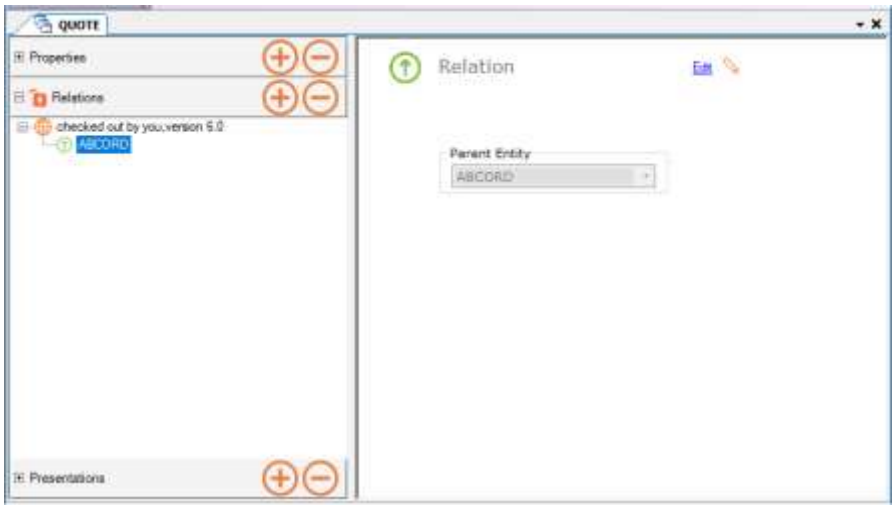
Relations define the way in which an Entity can point to another Entity, either down via history or up via a LINK_FROM_XXXXX field. A link is defined from within a child entity to a Parent and will then appear in both entities.

If you want to define a link between the Sub (child) Entity QUOTE and the primary (parent) Entity ABCORD, open the Child Entity (OUOTE) and go to the **Relations** section.

- Click the locked Relations icon and select **Check out**… from the menu displayed.
- Press the button at the top right of the **Relations** dialog.
- In the **Define Relation Entities** section, select the Parent Entity (ABCORD) to be associated with the child entity from the list of available entities not presently related to the selected Entity.



- Click the button to create the relationship or **Cancel** the action.



- To change the existing relationship, select the Entity prefix in the tree on the left, and click the Edit link on the right of the Relations dialog.
- Use the button to define a new relation, or the button to remove a selected Entity relation.

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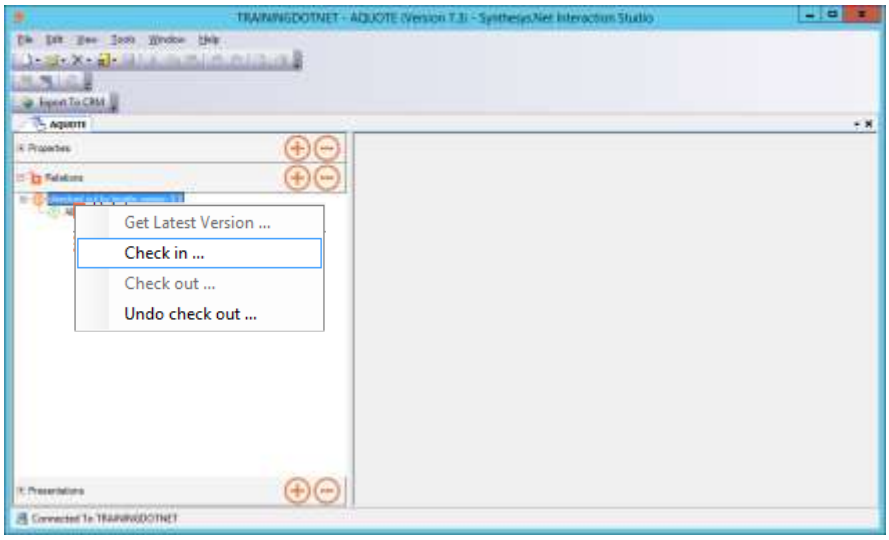
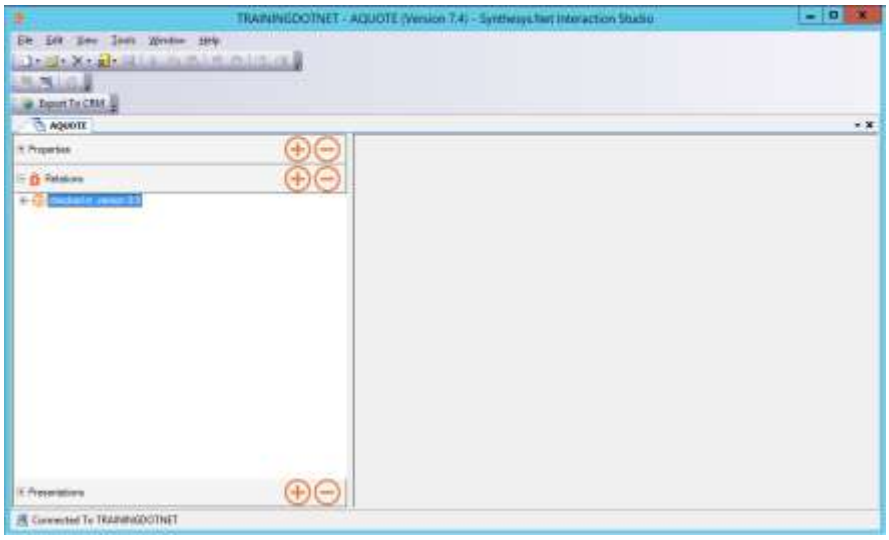
Checking Relations in and out

When you have established the relationship, ensure that you check in Relations, before exiting the Entity Designer.

- In the Relations dialog, click on the currently checked out Relations icon.
- Select **Check in**… from the drop-down menu, to check in your edited Relations.
- Select **Undo check out,** to check in Relations when no changes have been made**.**



- Checked in Relations show a locked Relations icon.



Relations can only be checked in by the user who has the Relations checked out, to avoid duplication.

*Always ensure that you **Check in** Relations or **Undo Check Out**, before exiting the Entity Designer.*

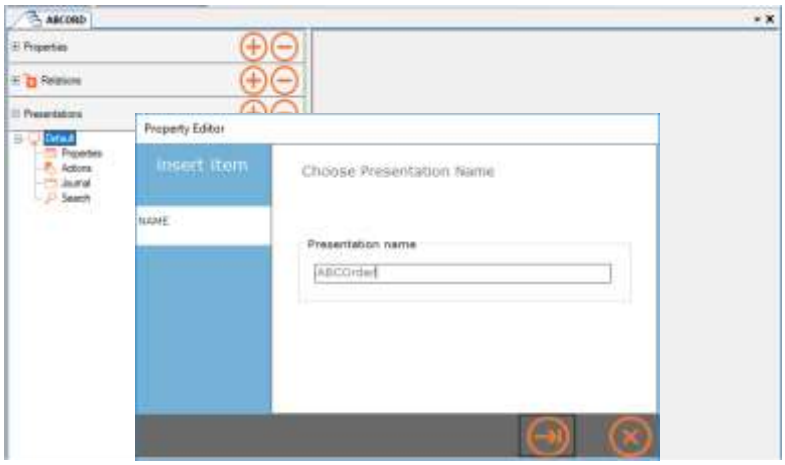
ENTITY PRESENTATIONS EDITOR

The content and layout of an Entity is configured in the **Presentations** editor.

You can use and adapt the **Default Presentation**, which is generated automatically when designing a new entity, or you can create a new entity specific presentation.

To create, for example a new entity specific presentation for the ABCORD Entity

- Open the ABCORD Entity and press the button on the **Presentations** dialog.
- Enter a logical name into the **Presentation name** field, i.e., ABCOrder.



In the **Entity Presentations Editor** are essentially four main elements that require specifying: Properties, Actions, Journal and Search.

Option	Used To
Properties	Create sections and add captions and data fields to a Grid or in Html mode.
Actions	Add a link to documents, or URLs to launch a scripted app or web page from within the entity at run time.
Journal	Display a type of event or related (child) entity (e.g. Quote entity)
Search	Add search fields to be used at run time to bring up entity records.

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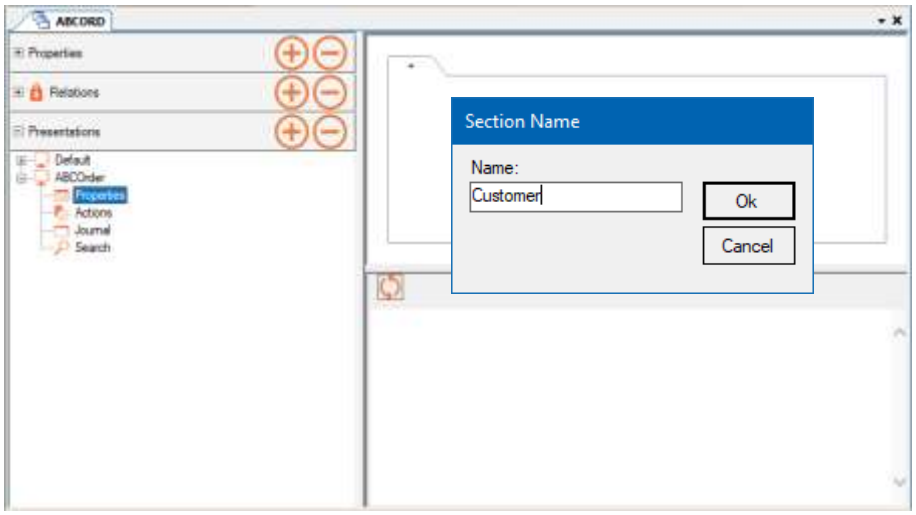
Entity Presentations: Properties

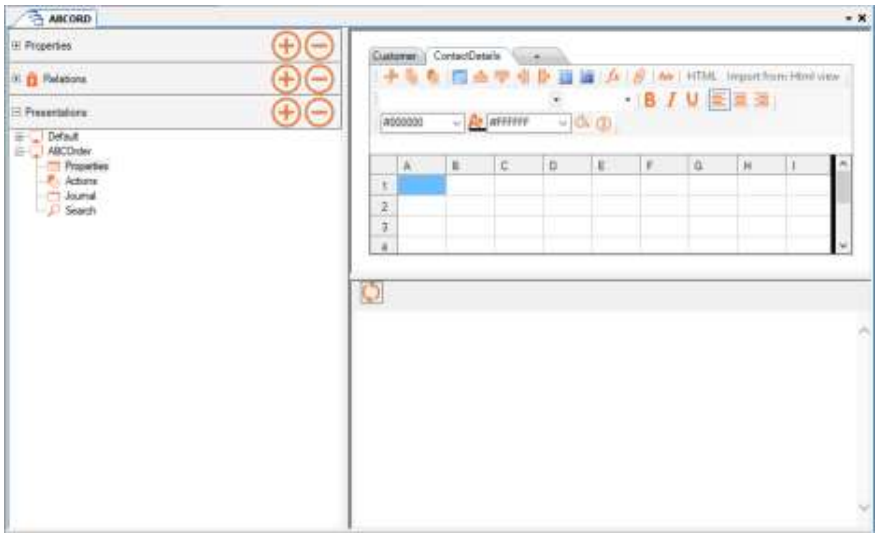
In the **Properties** page of the Entity Presentations editor, you can create new sections and assign specific Entity information to each section.

Adding a new Section

- Click on the + symbol next to the Entity Presentation that you want to configure.
- Select **Properties** in the tree on the left of the dialog.
- To add a new section, click the **+** symbol in the dialog on the right.
- Enter a logical name for the section.



- Click **OK** to save the changes or **Cancel** the action without saving changes.



- Add any further sections as required following the steps above.

Next, add the captions and data to your section(s) using the Grid mode or HTML mode. Please see the next pages for more information

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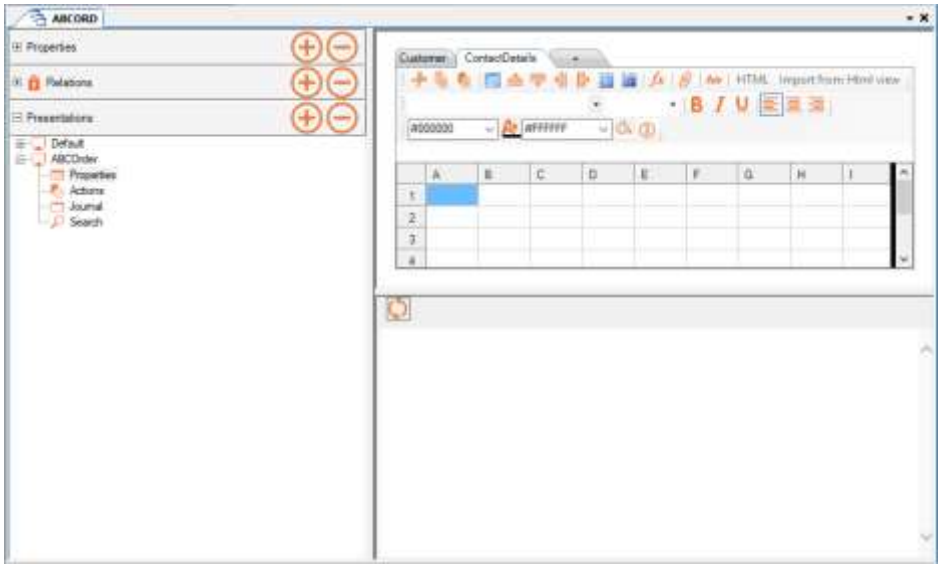
Section Display

When in the grid mode, you can use a range of icons to specify the number of columns and rows displayed in the grid and for formatting the content within a section.



Option	Description
	Cut. Remove the currently highlighted selection and place it on the Windows clipboard.
	Copy the currently highlighted selection to the Windows clipboard.
	Paste the contents of the Windows clipboard at the cursor /insertion point.
	Grid. Allows the user to specify the number of rows and columns in the grid.
	Insert Row Above the currently highlighted row.
	Insert Row Below the currently highlighted row.
	Insert Column to the left of the currently highlighted column.
	Insert Column to the right of the currently highlighted column.
	Merge adjacent cells into a larger cell which can span columns and rows.
	Split Cells. Split the content from one cell into two or more cells.
fx	Insert Calculation. Add entity related data to a cell by creating a new or selecting an existing calculation.
	Web Link. Specify the name and URL to define a web link within cells, mainly to Synthesys™ Scripted Apps.
Aa	Themes. To select a predefined theme (css) such background colours, font sizes & colours, frames, column widths etc., to be applied to the current selection, i.e., one cell, several cells, or the whole table.
B *I* U	Display highlighted text in bold, italic or with underline.
	Align highlighted text to the left, in the centre or to the right.
	Insert Entity Properties. Opens the Entity Properties dialog and allows users to drag and drop data fields into the grid cells.

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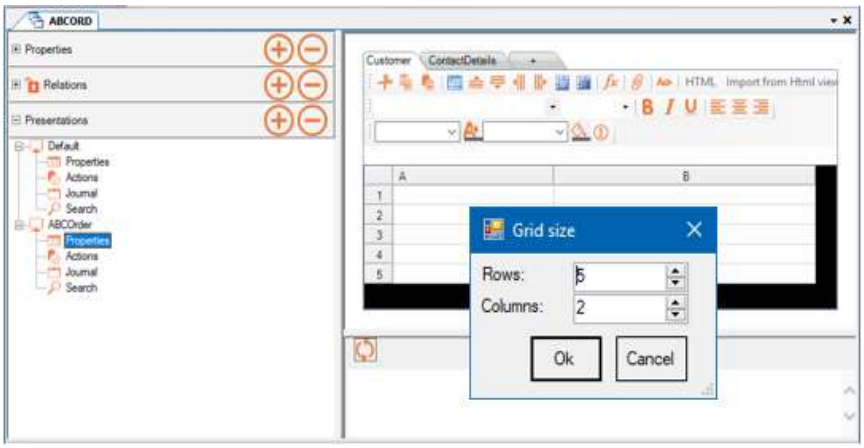
Defining Section Content in Grid Mode

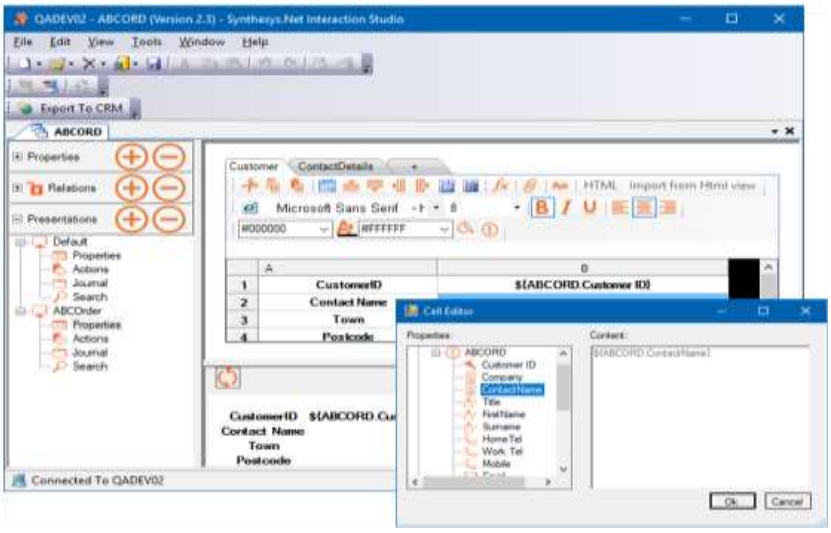
Depending on the captions and data that you wish to add to each of your sections, you may want to change the default grid settings accordingly:

- Click the **Grid** icon to specify the number of columns and rows to display.
- Use the **Formatting** toolbar, to format the text inside the cells.



Adding Captions

- Left double click into the relevant column and row to open the **Cell Editor**.
- Type the caption into the **Content** page of the Cell Editor.



Adding Data

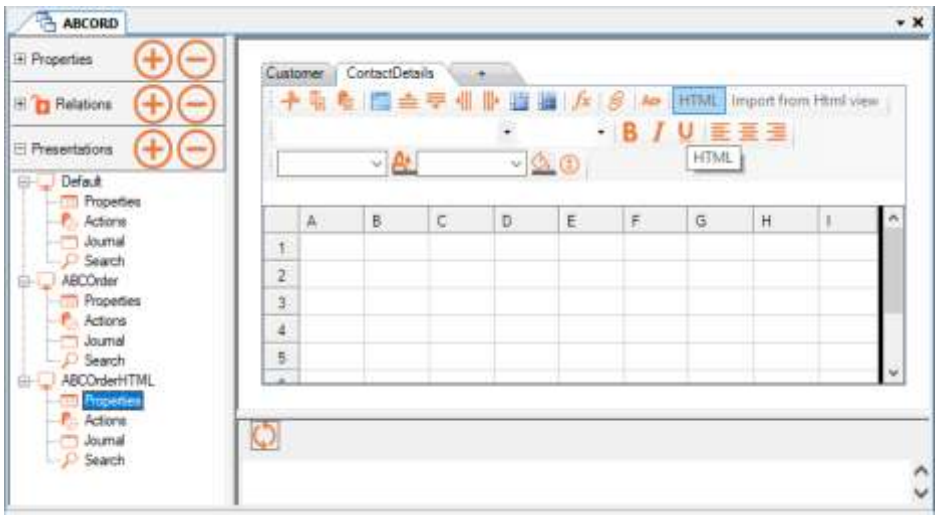
- Left double click into the relevant column and row to open the Cell Editor.
- Select the data field to match your caption and move it into the Content page with a double click of the left mouse button.
- Alternatively, click the icon to open the Entity Properties dialog and drag and drop the required data fields into the relevant grid cells.

Defining Section Content in HTML Mode

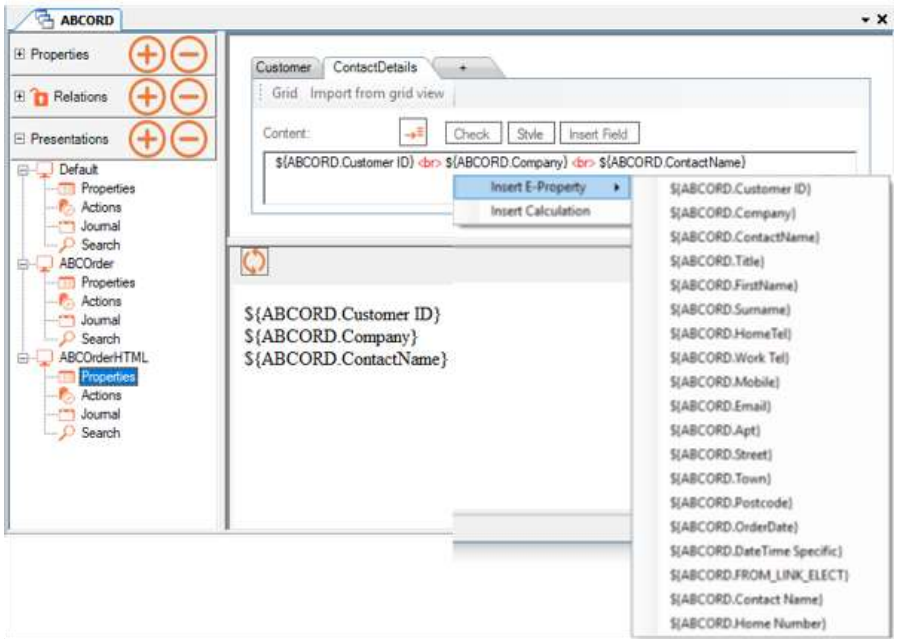
The Grid and HTML buttons allow you to switch between the Grid and HTML editors.

To add your data to the section of your Entity Presentation using basic Html code

- Click the **HTML** button at the top right of the Properties dialog.



- To insert the required data fields, click your right mouse button into *Content* page and select ***Insert E-Property***, or alternatively click the **Insert Fields** button.
- Select the field(s) that you wish to display under the selected section heading.



- To place each field on a separate line, use **
** between the fields.
- To format the text in Html mode, open the **Style Editor** by clicking the **Style** button.
- Click **Refresh** to add the selected fields to the *Content* page of the selected section.

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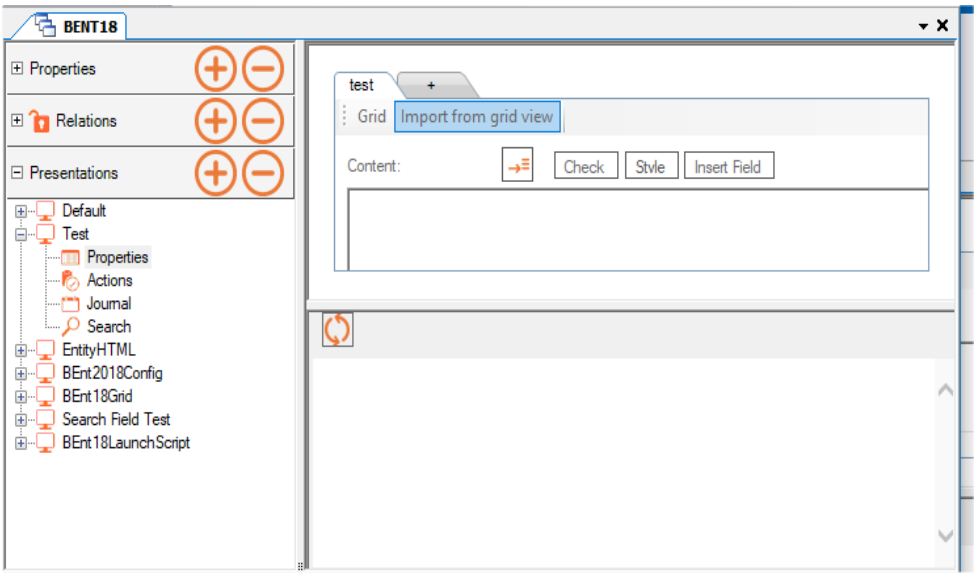
Importing Content between Grid and HTML Mode

Using the **Import from Grid view** and **Import from Html view** options, you can import section content that has been configured in grid mode to the Html page and html content into a grid, providing that the changes made while in HTML mode are compatible with the Grid mode.

- To import section content from a grid into the Html page, click the **Import from grid view** button in the Html page.



- To import content from Html mode into a grid, click the **Import from Html view** button in the Grid page.

If the HTML includes elements that the Grid mode doesn't understand or if the table is removed or altered in such a way that it becomes too complex (such as nested tables, etc.) then a message to this effect will be displayed when clicking the Grid mode button. You can then decide to return to the version used before switching to HTML mode, losing the recent changes, or you can Cancel the action.

If the presentation has been saved as HTML and is incompatible with the Grid mode, the Grid button will be disabled until the HTML has been edited.

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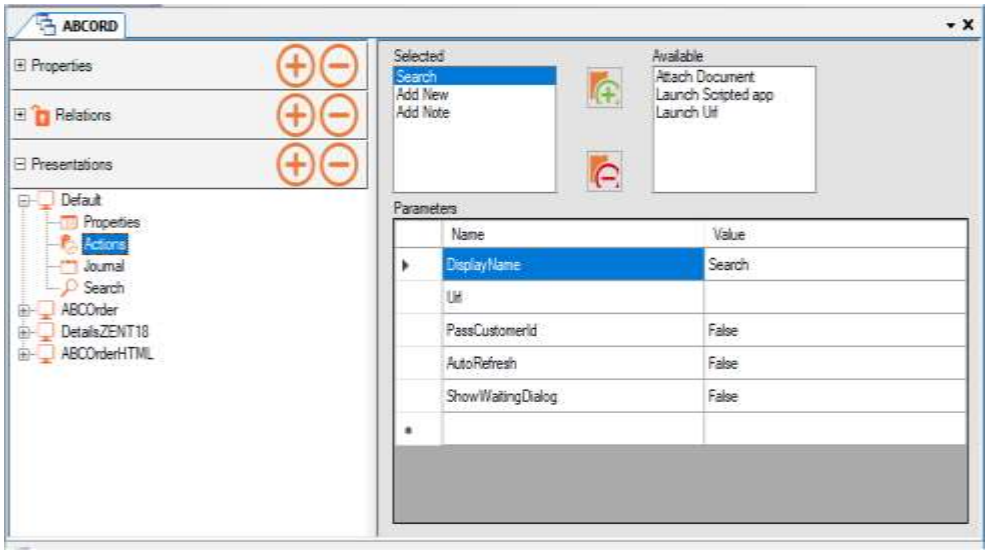
Entity Presentations: Actions

The **Actions** dialog of the Entity Presentations editor contains a list of selected and available actions that can be used as part of the Entity presentation at run time in the Portal.

- Use the plus icon to move a selected action from the **Available** dialog into the **Selected** dialog on the left.
- Use the icon to remove a selected action from the **Selected** dialog back to the **Available** dialog on the right.



Available Options	Description
Search	Return to the Search page, to search for another Entity record.
Add New	Launch a scripted app to be used for the creation of new Entity records.
Add Note	View and add notes relevant to the selected record.
Attach Document	Browse for and upload documents from the URL specified.
Launch Scripted App	Launch scripted app(s) from the URL specified.
Launch URL	Launch website(s) from the URL specified.

The Search, *Add New,* Add Note and add Document *actions can only be added once.*

The Launch URL *or* Launch Scripted app *actions can be added multiple times, with different sets of parameters, to launch a choice of scripted apps or web pages.*

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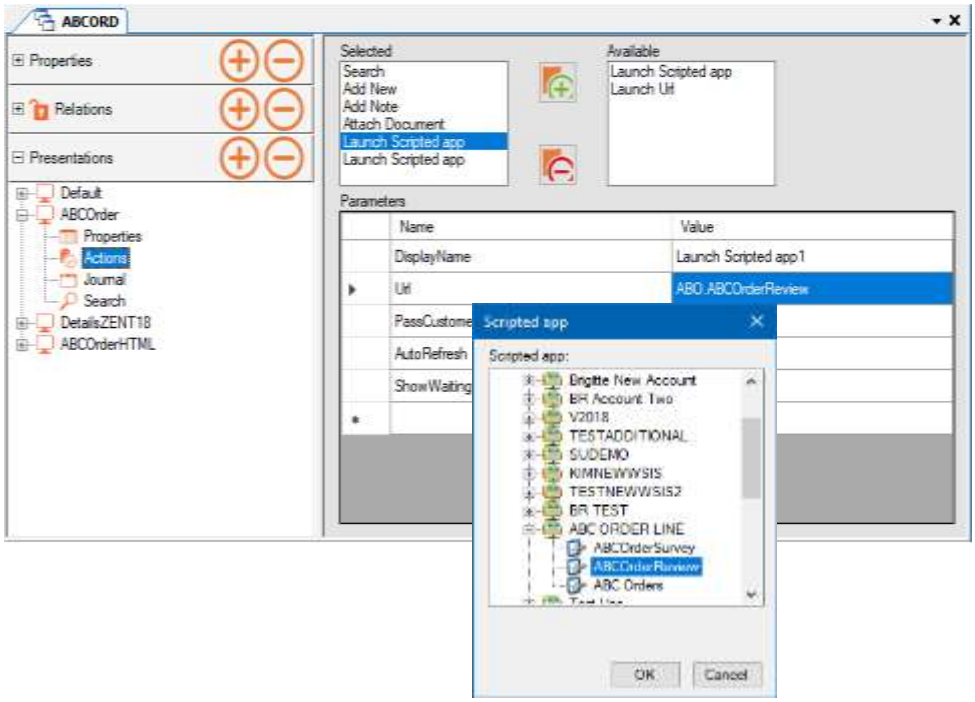
Adding URLs to Launch Scripted Apps

If you wish to launch a scripted app from within the Entity at run time in the Synthesys™ Portal

- Use the plus icon to move **Launch Scripted app** from the **Available** dialog into the **Selected** dialog on the left.
- With **Launch Scripted app** selected, double click your left mouse button into the URL **Value** field to open the **Scripted app** dialog.
- Select the required scripted app in the *Scripted app* dialog displayed and press OK.
- Enter the name of the script to be launched into the Display Name, Value field.
- To add further scripted apps, repeat the above steps.



Adding URLs to launch Websites or attach a Document.

If you wish to launch a website from within the Entity at run time or enable agents to attach a document to a customer's record

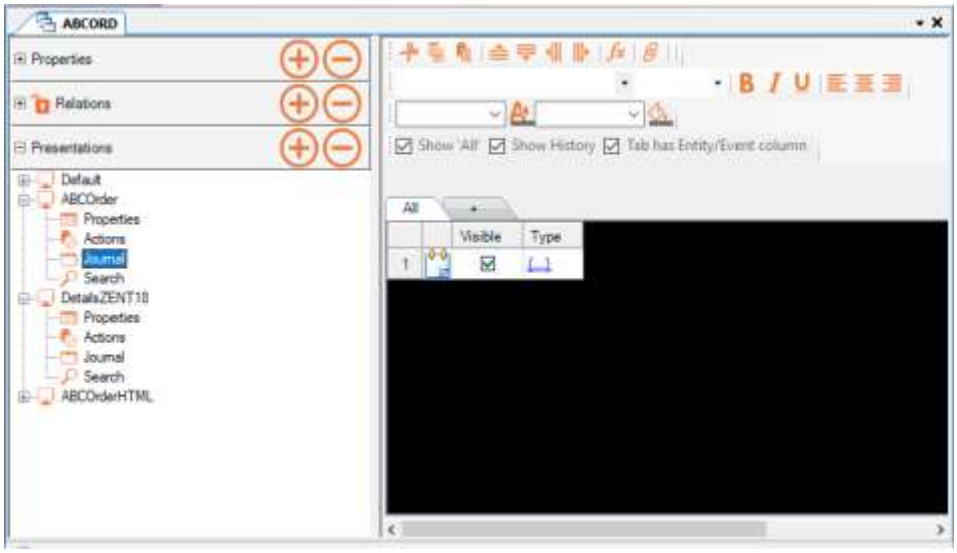
- Use the plus icon to move **Launch Url and/ or Attach Document** from the **Available** dialog into the **Selected** dialog on the left.
- With **Launch Url** selected, type the relevant URL into the **Value** field.
- With **Attach Document** selected, type the file location into the **Value** field.
- Enter a name for the Website (or Document) into the Display Name, Value field.

*The **Attach Document** action can only be added once to a selected Entity Presentation.*

*The **Launch Scripted App** and **Launch Url** actions can be added multiple times, each time specifying the associated URL, as described in the steps above.*

Entity Presentations: Journal

In the **Journal** page of the Entity Presentations editor you can define, which history events or related (child) entity information you wish to display to users at run time.



In the Journal display area are a range of icons that you can use to format the page.

Option	Description
	Cut. Remove the currently highlighted selection and place it on the Windows clipboard.
	Copy. Copy the currently highlighted selection to the Windows clipboard.
	Paste. Paste the contents of the Windows clipboard at the cursor /insertion point.
	Insert Row Above the currently highlighted row.
	Insert Row Below the currently highlighted row.
	Insert Column to the left of the currently highlighted column.
	Insert Column to the right of the currently highlighted column.
	Insert Calculation. Add entity related data to a cell by creating a new or selecting an existing calculation.
	Web Link. Specifying the name and URL to define a web link within cells, mainly to Synthesys™ Scripted Apps.
B I U	Display highlighted text in bold, italic or with underline.
	Align highlighted text to the left, in the centre or to the right.

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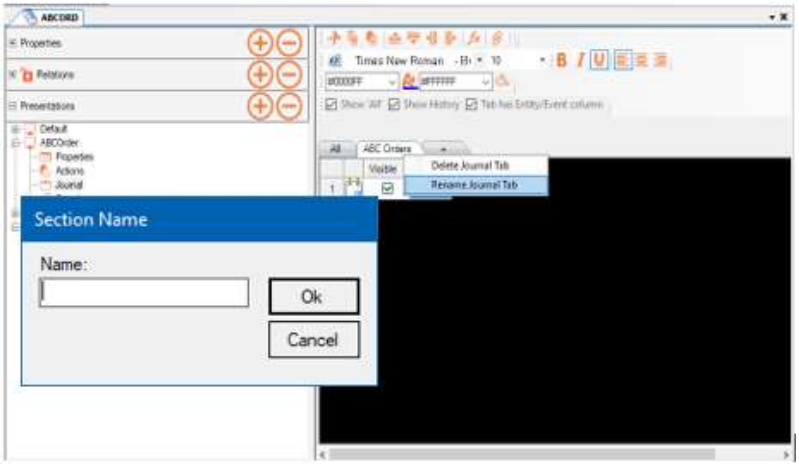
Adding Journal Tabs and Columns

The Journal definition page is based on a grid system, initially only displaying the “All” tab, which is used to present a summary of all history events and linked child entities.

The **All tab** can’t be modified, but it can be displayed or removed using the Show ‘**All’** tick box**.** To display history events, tick **Show History. T**o display a column containing the name of the entity/event(s), tick **Tab has Entity Event column.**

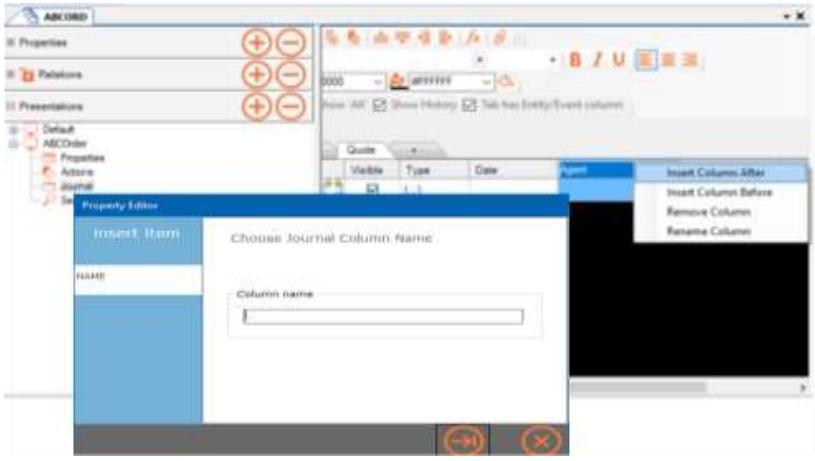
Adding, Renaming and Removing Journal Tabs

- To create a new journal tab, click the + symbol next to the All tab.
- Enter a name for the new journal tab into the section dialog displayed.
- To change the name, right click on the tab and select **Rename Journal Tab.**
- To delete, right click on the tab and select **Delete Journal Tab.**



Adding, Renaming and Removing Tab Columns

- To add a new tab column, right click on the Type tab heading and select **Insert Column After (or Before).**
- Enter the **Column name** into the *Choose Journal Column Name* dialog.

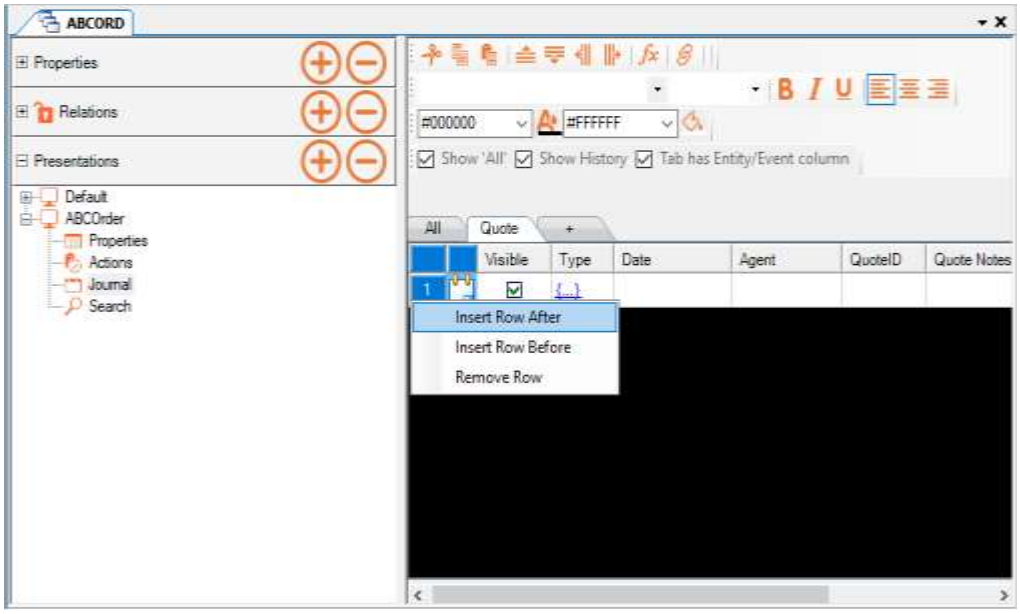


- To rename or remove columns, right click on the relevant column heading and select **Rename Column** or **Remove Column.**

Adding Rows and Journal Type

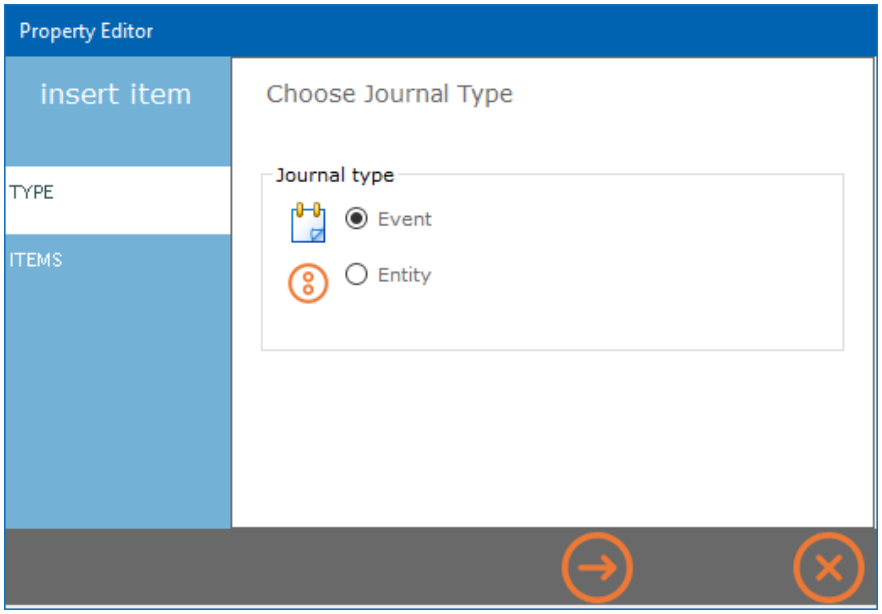
Each row corresponds to a type of Event or related (child) Entity and associated information to be displayed within the selected tab.

- To add a new **Row** to the grid, right click on the existing row and select **Insert Row After (or Before).**



In the **Choose Journal Type** dialog now displayed

- Select **Event**, if you wish to display selected history event types.
- Select **Entity**, if you wish to display instances of a related child Entity.



Please see the next pages for more information.

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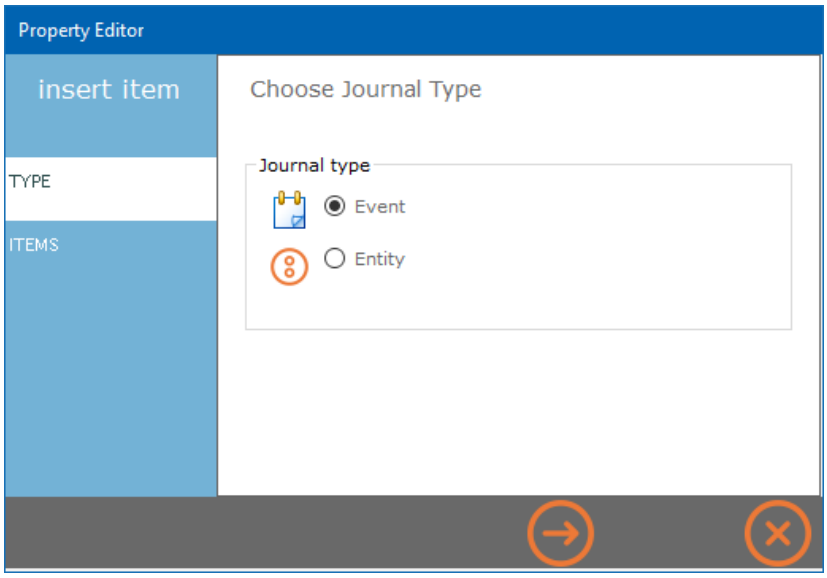
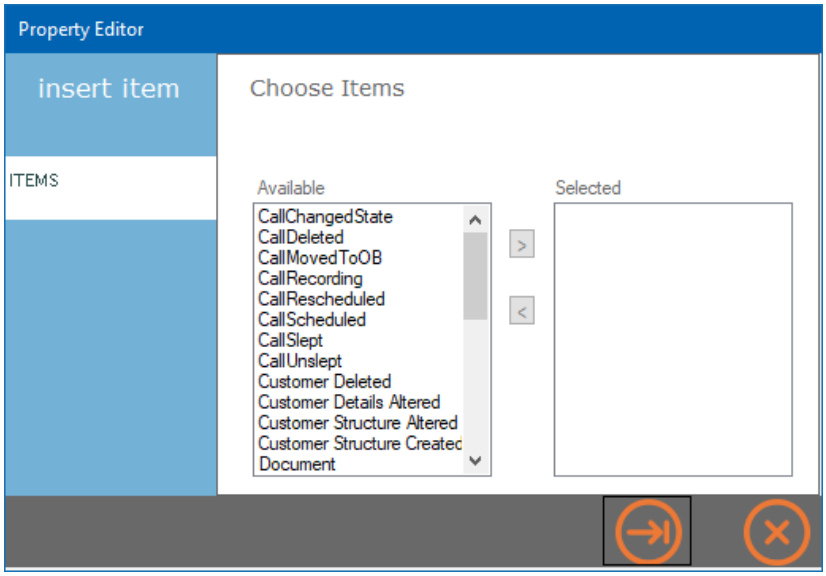
Journal Type: Event

If you wish to add selected historical event types to your new Row

- Select **Event**, in the **Choose Journal Type** dialog.
- Click the button to move to the Items page.



- In the **Choose Items** page showing a list of all history event types as defined on the system, select the history event types that you wish to display.
- Use the **>** arrow button to move the selected items from the Available section into the Selected section. Use the **<** button to remove selected items.

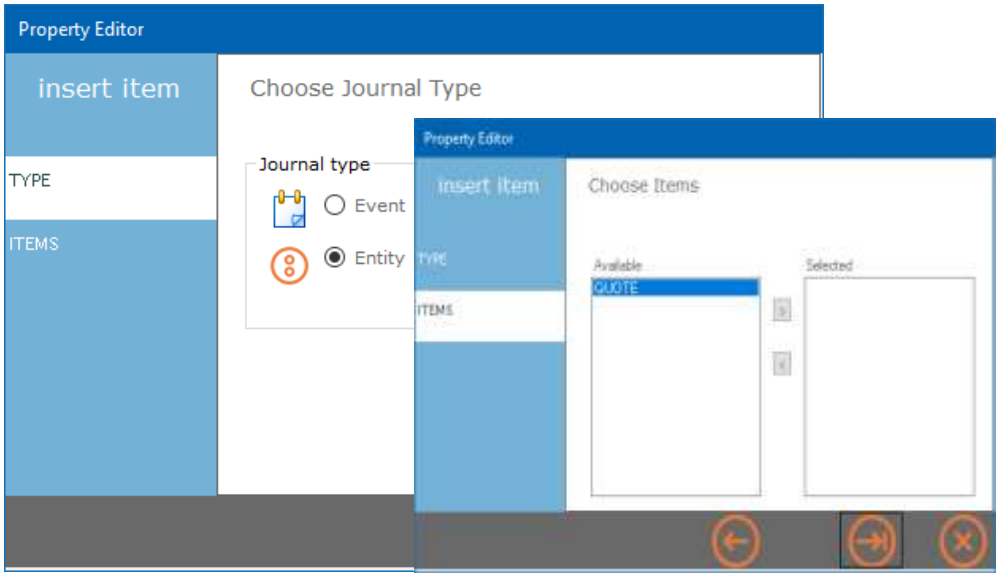


- Click the button to add the selected items to the Type filed of your new row.
- To close the Property Editor without saving the changes, click the button.

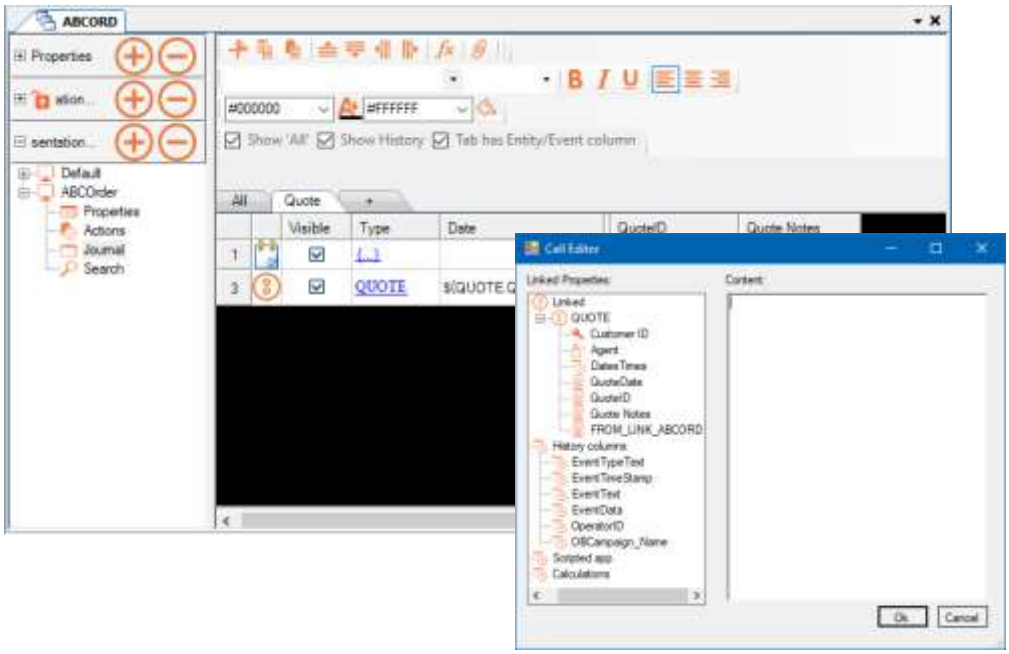
Journal Type: Entity

If you wish to display instances of a related (child) Entity

- Select **Entity**, in the **Choose Journal Type** dialog.
- Click the button to move to the Items page and select the (child) Entity that you wish to add. Use the **>** arrow to move it from the **Available** section into the **Selected** section. Use the **<** button to remove a selected Entity.



- To add information from the selected Entity to the grid, left double click into the relevant column and row to open the Cell Editor.
- Select the data field to be added in the **Linked Properties** section of the Cell Editor and move it into the **Content** page with a double click of the left mouse button.

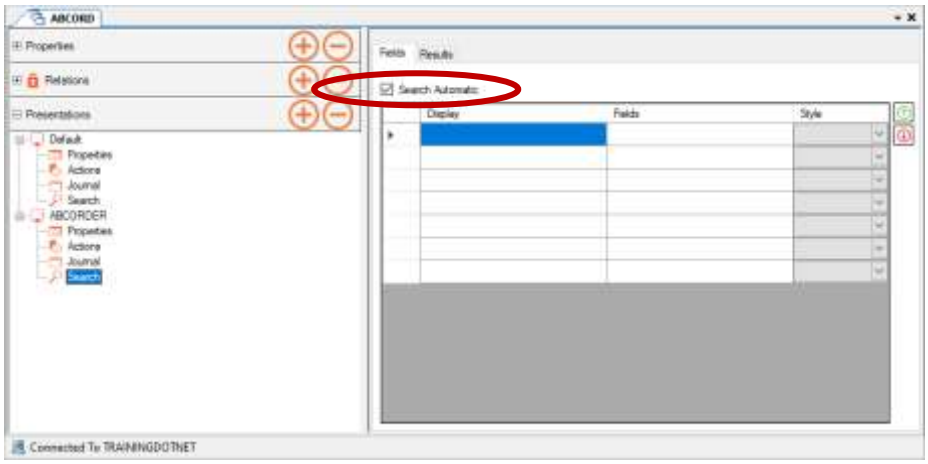


Entity Presentations: Search

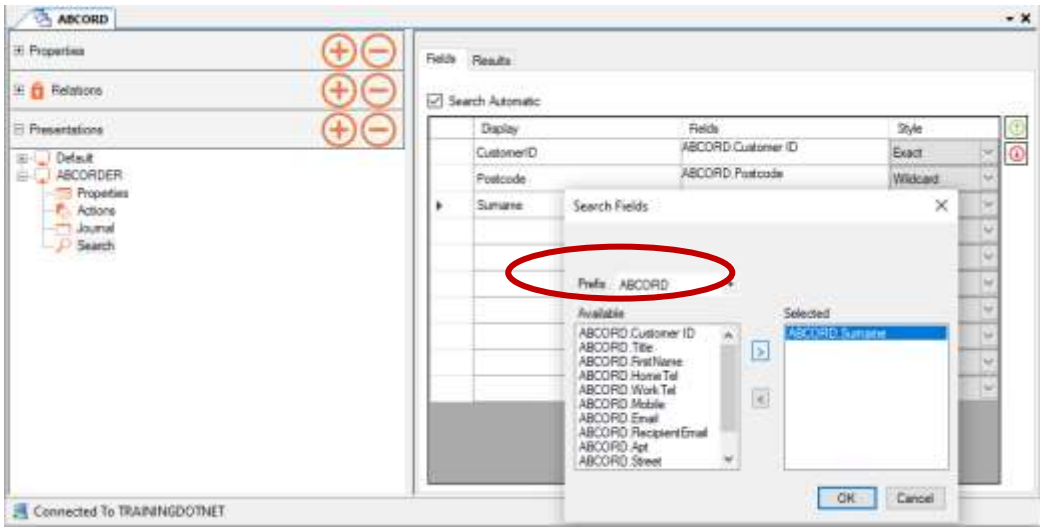
Using the **Fields** and **Results** sections in the Search page of the Entity Presentations editor, you can determine which CRM Entity fields to use as search fields at run time, and which data to display to agents, if a search returns multiple records.

Defining Search Fields

- In the **Fields** section of the Search dialog, tick ***Search Automatic***, to enable auto search, for example when using an Entity with CLI or for Outbound screen pops.



- Enter the names for your search fields into the rows of the **Display** column.
- Left double click into the relevant **Field** row, to open the ***Search Fields*** dialog,
- Confirm or select the Entity **Prefix** that contains the required search fields.
- Use the **>** button, to move the data field to match your caption, from the **Available** section into the **Selected** section. Use the **<** button to remove a selected option.



- Click **OK** to add the selected data field to the Fields column or **Cancel** the action.
- To **remove** Search fields, highlight the row that contains the information and press **Delete** on the keyboard.

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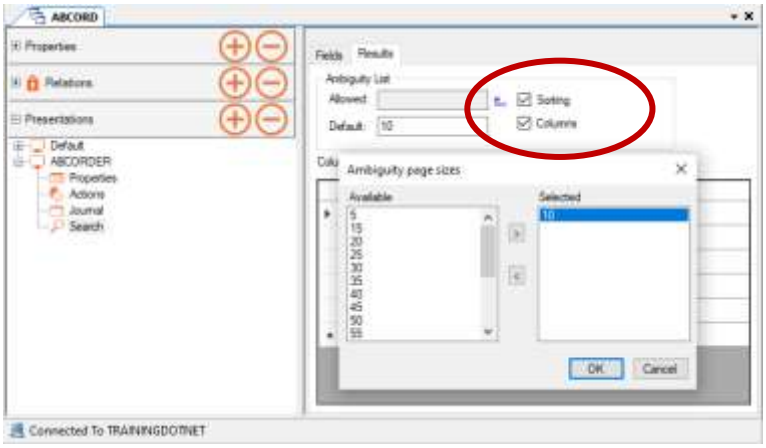
Defining Search Result Columns

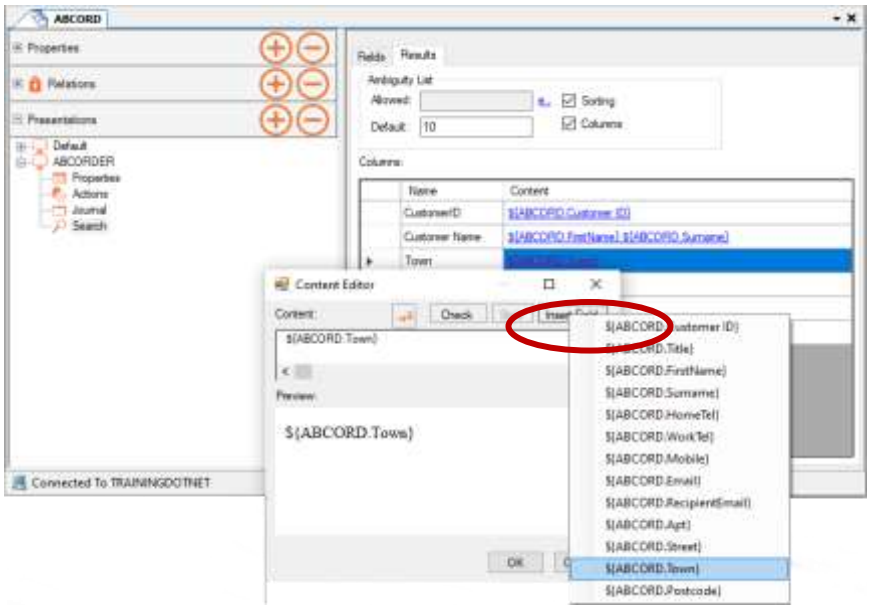
In the **Results** section of the Search dialog, you can specify which CRM Entity fields to present to agents, if a search returns an ambiguity of records.

- Use the **e** link next to the Allowed field, to change the number of search results displayed per page. The Default setting is 10 records per page.
- Tick the **Sorting** checkbox, to sort search results in alphabetical order.
- Tick the **Columns** checkbox, to show configured search result columns only.



To define the columns to be displayed if multiple records match a CRM Entity search:

- Enter the names for the search result columns into the rows of the **Name** column.
- Left double click into the relevant **Content** row, to open the ***Content Editor***.
- Click the **Insert Field** button and select the data field, to match your caption.
- Click **Refresh** to show the selected field in the *Preview* section.



- Click **OK** to add the selected data field to the Content column or **Cancel** the action.
- To **remove** a column, highlight the column entry and press **Delete** on the keyboard.

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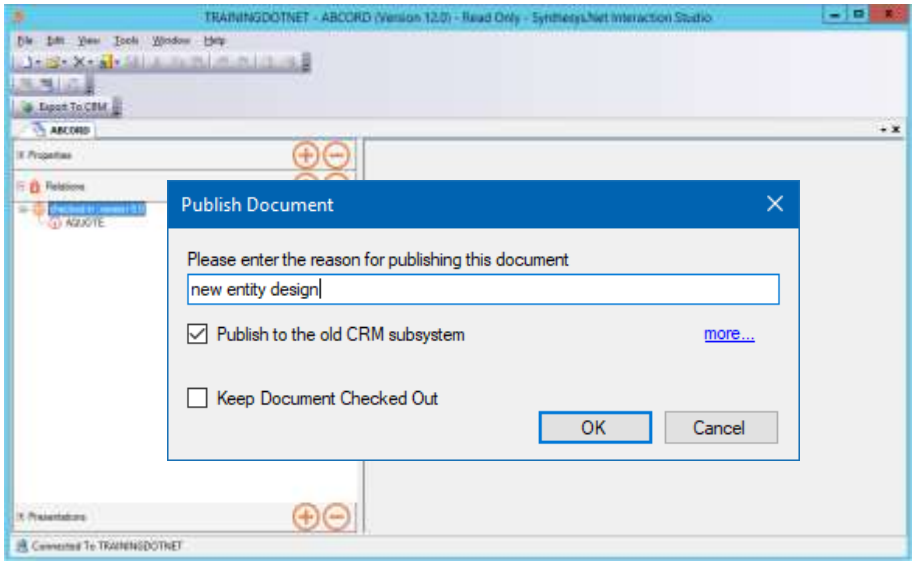
PUBLISHING ENTITIES

To access a new CRM Entity or updated Entity fields as part of your workspace and scripted app, you must first publish the Entity.

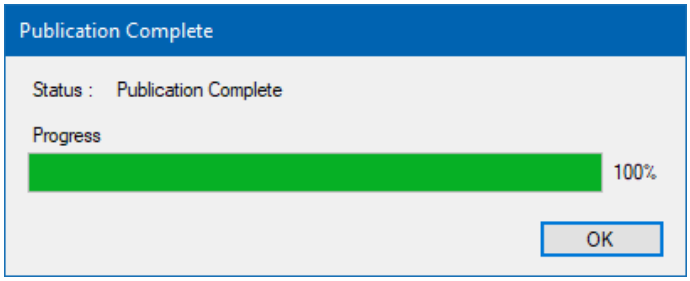
Always ensure that Relations are checked in and show a Relations locked icon , before exiting the Entity Designer.

When publishing an Entity, you need to be connected to the server and the Entity has to be checked out by you.

- Go to **File** – **Release** or use the Release icon, to open the *Publish Document* dialog, enter a brief reason for publishing the Entity and click OK.



- If displayed, tick **Publish to the old CRM subsystem**, to allow use of your Entity for SQI database imports (accessed via the Applications tab in Synthesys™ Management). Only select *Keep Document Checked Out*, if you are about to make further changes, otherwise it is advisable to keep the box unticked.
- Click **OK** to start the publication, and when the Progress bar shows that publication is 100% completed, click OK again.



When the CRM Entity is successfully published, the version number will go up to the next full number, from Version 1.3 to Version 2.0 or from 2.1 to Version 3.0. Any comments entered when publishing, are recorded in the Entity Version Control page.

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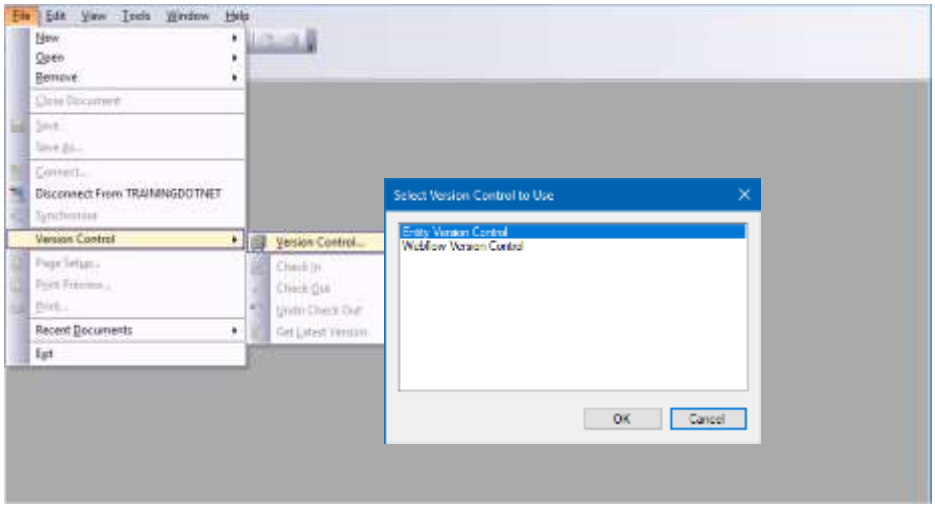
Entity Versions

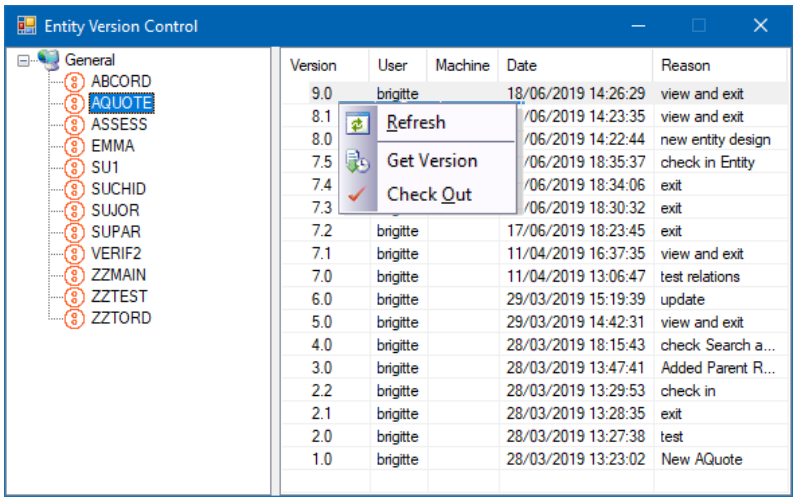
In the *Entity Version Control* dialog, you can view CRM Entity version numbers and any comments that were entered on checking in or publishing an Entity. The comments can be useful, for example, if you wish to roll back to an earlier version of a selected Entity.

- Open the Synthesys™ Interaction Studio and connect to the server.
- Go to **File/ Version Control** and select **Entity Version Control**.



- In the *Entity Version Control* dialog now displayed, select an Entity prefix in the tree on the left, to show the available Entity versions and associated details.
- Right click on a *Version* number, to display the following options:

Refresh	to update the list of published versions
Get Version	to open the selected version of the CRM Entity to view
Check Out	to check out the selected version of the CRM Entity to edit



If you need to roll back to an earlier version of a CRM Entity, select and right click on the Entity version that you wish to use and select *Check out*.

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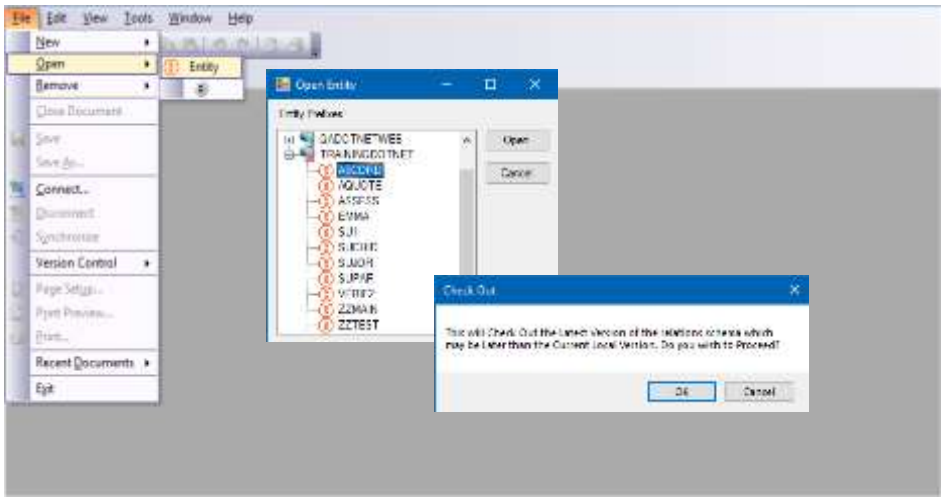
EDITING AN EXISTING CRM ENTITY

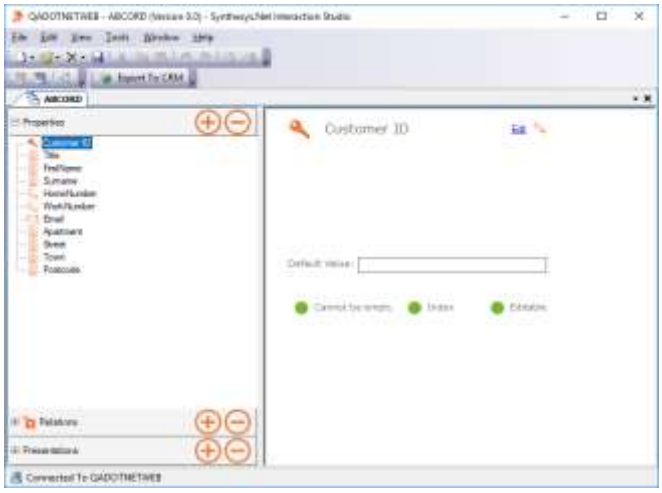
To view or edit an existing CRM Entity:

- Open the Synthesys™ Interaction Studio and connect the workstation to the server.
- Click the Synchronise icon, if enabled, to synchronise the local machine with the server, to pick up the latest checked in and published Entity and script versions.
- Next, go to **File / Open / Entity**.

The Open Entity screen shows a tree structure of the servers and Entity prefixes stored within the system.



- Select the name of the **Sever** and **Entity prefix** that you wish to check out.
- Click the **Ope**n button to load the Entity and latest version of the Relations schema.
- Make any changes as required, in the Properties, Relations and Presentations pages of the Entity Designer.



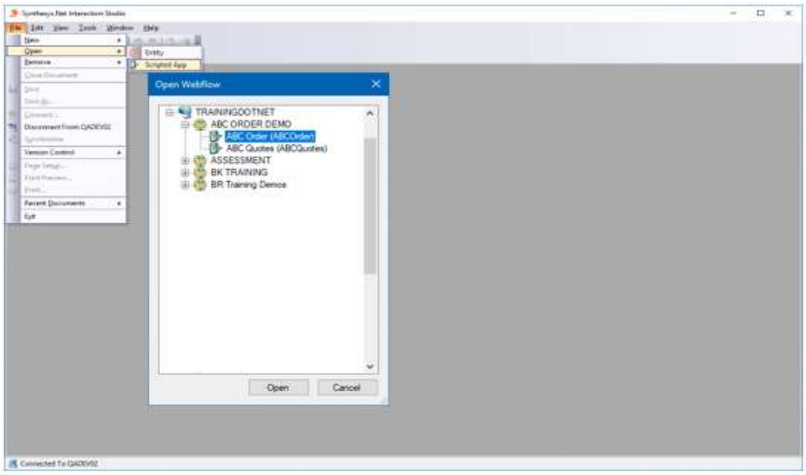
Always ensure that Relations are checked in, showing a locked Relations icon, before exiting the Entity Designer.

NTTY CONTROL CONFIGURATION

Details of your CRM Entity can be accessed as part of your workspace and scripted app in the Synthesys™ Interaction Studio, by using the **Ntty** control.

For a more detailed description of the Synthesys™ Interaction Studio und all aspects of creating workspaces, linking an Entity to a workspace, and designing scripted apps, please see the module document Synthesys™ Scripted App Design.

- Open the Synthesys™ Interaction Studio and go to **File / Open / Scripted App.**
- Select the Scripted App used for your campaign and click the **Open** button.



- Drop a new section from the Scripted App Blocks toolbar into the scripted app and add the Ntty control to your section, giving both section & control a descriptive name.

- In the *General Properties* dialog of the **Ntty** Entity Wizard, pick up the Entity Prefix to be used and the Entity Presentation that will define the Entity layout at run time.

- If the selected Entity is to be the core Entity for the scripted app, tick the ***Main Entity for This Scripted App*** check box.

Click *Next>*, to move to the ***Entity ID Format*** page of the Ntty control.

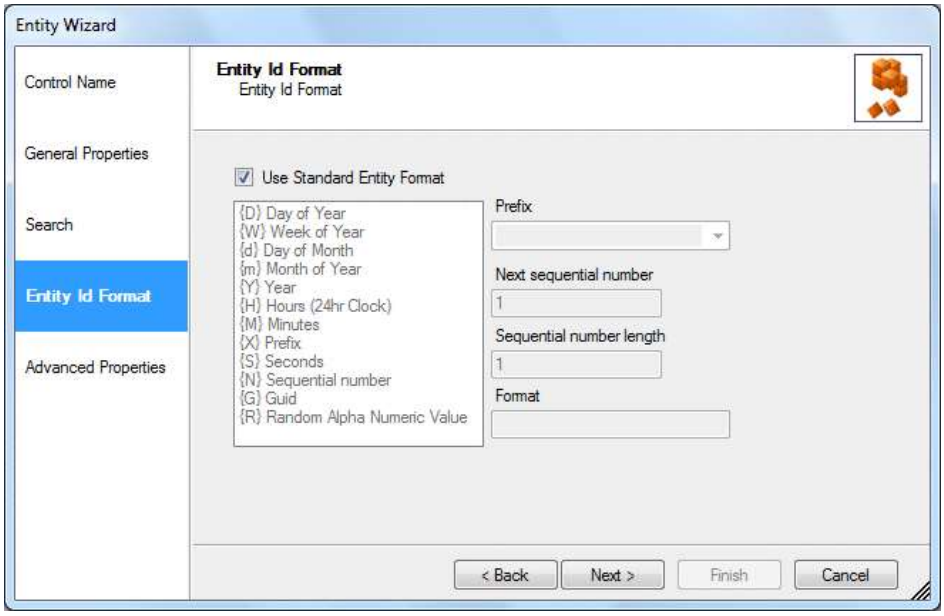
Entity ID Format

In the **Entity ID Format** section of the Entity Wizard, you can define how the Entity ID is displayed at run time, when creating new CRM Entity records.

- To use the **Standard Entity Format**, ensure that the option is ticked.

To use your own format settings, as required

- **Remove** the tick in the *Use Standard Entity Format* box.
- Select or enter a new prefix for the *Entity ID Format* into the **Prefix** field.
- Into the ***Next sequential number field***, enter the number with which to begin the sequence.
- In the ***Sequential number length*** field, specify the length of the number.
- In the ***Format*** field you can include further details to be displayed. Selecting, for example, **{X} {m} {Y},** will display the *Prefix, Month* and *Year* as part of the **CRM Entity ID at runtime.**



Click **Next>,** to move to the ***Advanced Properties*** page of the Ntty control.

Advanced Properties

In the **Advanced Properties** page, all control properties are displayed and can be set using calculations.

The properties specific to the *Ntty Entity Wizard* are listed below.

Property	Data Type	Description
EntityID	String	The unique identifier of the selected entity record
HistoryID	String	The unique identifier of the entity record, the history event is for
HistoryPrefix	String	The name or prefix of the entity the control will use to display history data.
Main Entity	Boolean	Determines whether the field is mandatory (True) or not (False)
Prefix	String	The name or prefix of the entity you want this control to show.
Presentation	String	Set to Default
IDFormatPrefix	String	Defines how the entity ID is displayed, i.e., Customer ID = TRN_1
UseStandardFormat	Boolean	Set to True to use standard format or else to False
SearchAutomatic	Boolean	Determines whether the automatic search for this field is enabled (True) or not (False)
SearchDisplay 1-10	String	The text/ label that is displayed for the search field at run time (i.e., CustomerID; Surname; Telephone; Postcode etc.
SearchP1-P10	String	Represent the columns set up as search fields and allow for the calculation of data for auto searching.
SearchProperties1-10	String	BENTY1.Surname;Wildcard. The first part of the string must be the CRMPrefix**.**FieldName followed by a *semicolon* (;) and the search type (Exact; Contains; Wildcard or Soundex). Any fields that are in linked entities must have a history event in the main entity in the format detailed in the next section.

Click the Scripted App tab to return to the scripted app view, and save your scripted app.

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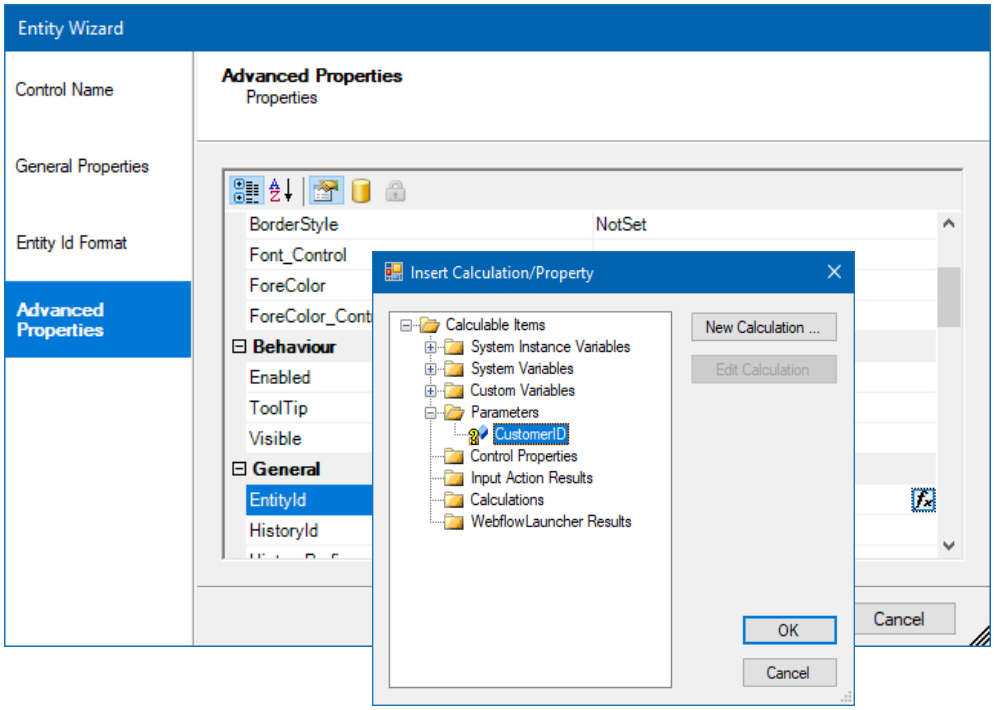
Linking Customer ID Parameter to Entity ID

To present records automatically when using CLI, or for Outbound calling

- Ensure that you have added the relevant Search fields and ticked the *Search Automatic* option in the **Search** page of the Entity Presentations Editor (see page 27 of this document), when creating your Entity table in the **Entity Designer**.
- Ensure that you have added a CustomerID parameter in the Scripted App Properties section of the scripted app.

In your Ntty control

- Go to the **General** section of the **Advanced Properties** dialog.
- Select the **EntityID** field and click the calculation icon now displayed.
- Pick up your **CustomerID parameter**, to create a link between the EntityID and the CustomerID.
- If you are using CLI to present records, map the SearchP1-9 fields to the CLI that comes in through the CLI Parameter.



- Save and Publish your scripted app.

Displaying the Control

To display the configured Ntty control in the Scripted app design area:

- Click **Finish** in the *Advanced Properties* page of the Entity wizard.

The appearance of the Ntty control will reflect the configuration as specified in the **Entity Presentations**.

To display a text prompt with the Ntty control, use the **Prompt** web control.

NTTY CONTROL IN SYNTHESYS™ PORTAL

Having logged into the Synthesys™ Portal via the Web Browser, the correct scripted app is automatically launched when a call is routed through to your workstation.

If the scripted app has been designed to contain a Ntty control, the customer record will be displayed automatically in the control when taking Outbound calls, or if CLI is enabled and the customer calls from a recognized telephone number.

For a more detailed description of the Agent Portal and for further information about agents handling calls, please see the module document Synthesys™ Agent Portal.

Searching for Customer/ Entity Records

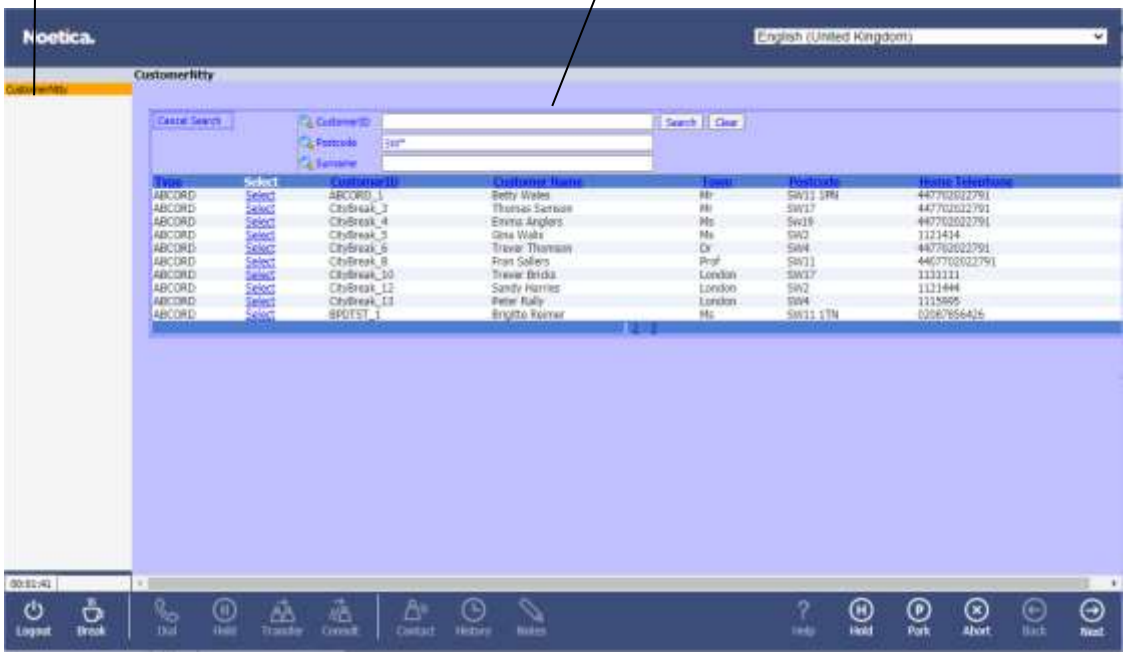
When handling Inbound calls and customer details are not displayed automatically, you will be able to search for existing customer records using the available **Search** fields.

- Enter any known details into the Search fields displayed, such as a customer ID or policy Number, a surname and/ or postcode.
- Click the **Search** button on the right of the Search fields.
- If multiple customer records are returned for your search, select the relevant customer from the list displayed and click the **Select** link.

Section Area, with Section headings

Search fields, specified at design time.

Ambiguity Search Result columns, specified at design time.



CTI toolbar

CRM Toolbar

Navigation Area

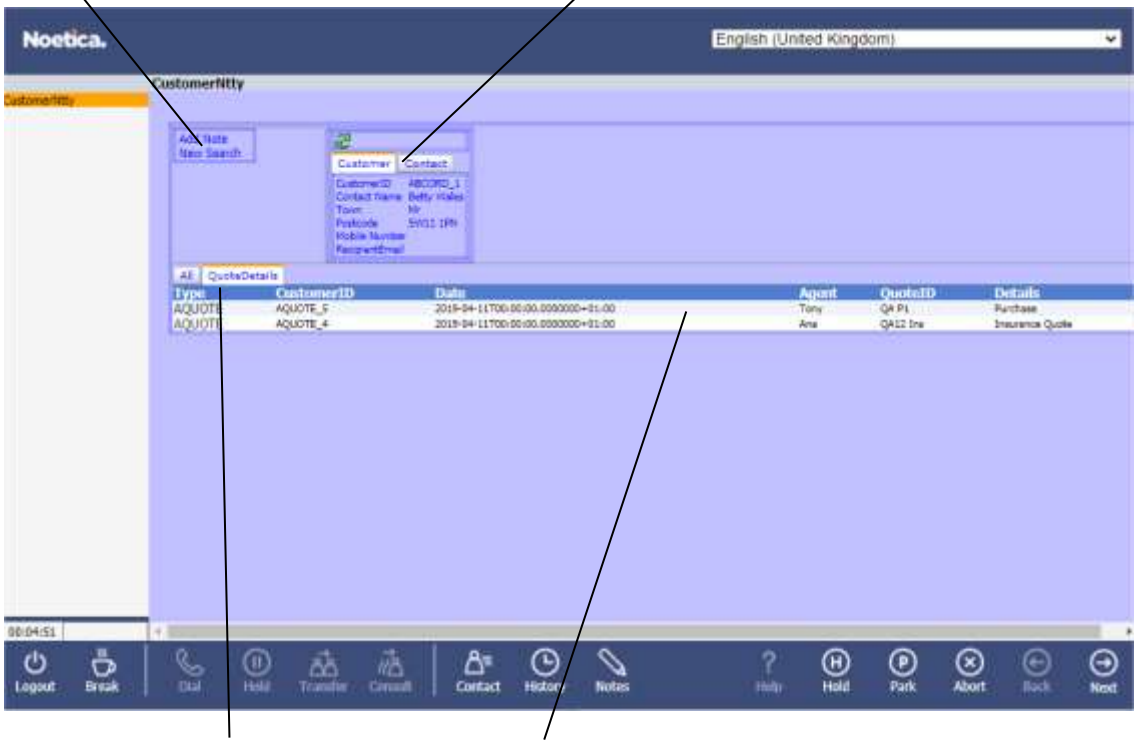
Viewing a selected Record

With the customer details displayed, either having manually selected a record, or when using CLI or taking Outbound calls, the appearance of the Entity screen again reflects how the CRM Entity was configured at design time in the *Presentations Editor.*

Toolbox	Options can include ***Search*** to allow the return to the initial search page, ***Add Note, Attach Document*** and **Launch Website** or **Scripted App**.
Section tabs	Displaying any tabs and associated *CRM Entity* information, as configured at design time, in the Entity *Presentations Editor*.
History tabs	Displaying any tabs and associated *CRM Entity history* information, as configured at design time, in the *History* page of the *Presentations Editor*.
History event section	Showing all or selected historical *Entity history* events, as specified in the Entity *Presentations*.

Toolbox, fields specified at design time.

Section tabs with associated *Entity* information.



History tabs.

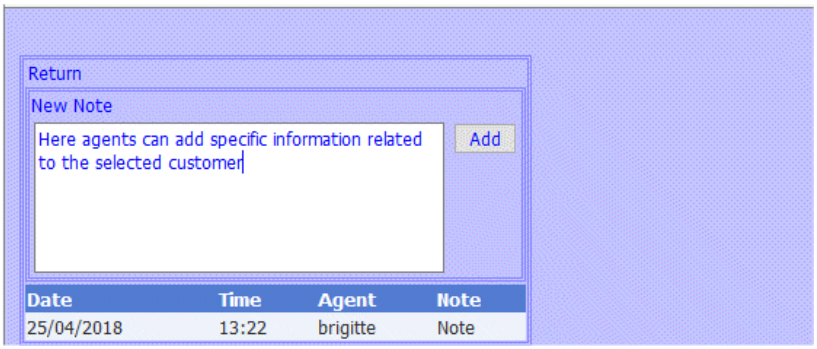
History event section

Adding a Note

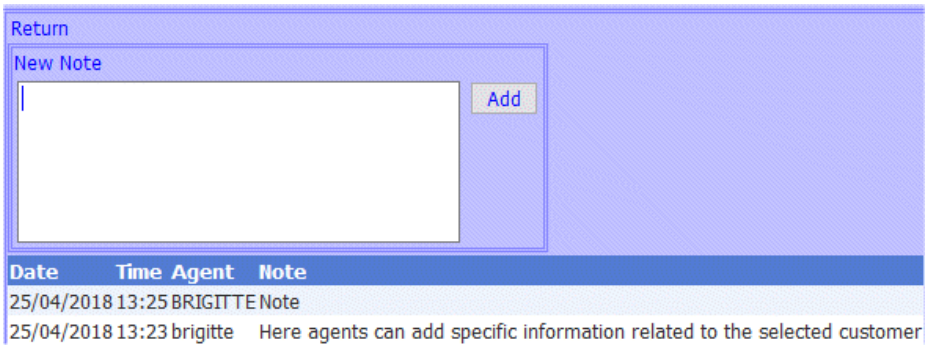
To add a new note with information associated with a selected customer entity record:

- Select the **Add Note** option in the toolbox.

- Enter the text for your note into the ***New Note*** box displayed.



- Click the **Add** button to save the note.



- Click **Return**, to return to the CRM Entity page.

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