

CUSTOMER HISTORY EVENTS



Show Filter Options
Auto update: Never Update

Last updated 5 minutes ago

Change State
Stop
Schedule
Move To Outbound List
Delete
Customer Details
Customer History
Properties

ID	State	Customer ID	List	Retry Time	Times Called (List)	Agent	Telephone
<input checked="" type="checkbox"/> 11199	Done	BPOTST_1	ABCORList		0		447983626671 (Mobile)
<input type="checkbox"/> 11200	Done	BPOTST_2	ABCORList		0		447983626671 (Mobile)
<input type="checkbox"/> 11201	Sleeping	BPOTST_3	ABCORList	2021-06-23 17:30	0	ana	447983626671 (Mobile)
<input type="checkbox"/> 11202	Sleeping	BPOTST_4	ABCORList	2021-06-23 17:30	0	ana	07983626671 (Mobile)
<input type="checkbox"/> 11203	Scheduled	BPOTST_5	ABCORList	2021-06-23 12:00	0	ana	07983626671 (Mobile)
<input type="checkbox"/> 11204	Unobtainable	BPOTST_6	ABCORList		0		07983626671 (Mobile)
<input type="checkbox"/> 11205	Queued	BPOTST_7	ABCORList		0		07983626671 (Mobile)
<input type="checkbox"/> 11206	Queued	BPOTST_8	ABCORList		0		07983626671 (Mobile)
<input type="checkbox"/> 11207	Queued	BPOTST_9	ABCORList		0		07983626671 (Mobile)
<input type="checkbox"/> 11208	Queued	BPOTST_10	ABCORList		0		07983626671 (Mobile)

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Customer History for 'BPOTST_1'

Event	Time	Performer	Detail	Workspace	Campaign	List
Outbound Managed Change State	21/06/2021 17:30:21	brigitte	Call 11199 Changed State to Done			
Scripted App	08/06/2021 16:53:28	brigitte	No Answer	ABC ORDER DEMO	ABCORDCampaign	ABCORList
Customer Details Updated	26/05/2021 11:43:49	brigitte				
Scripted App	26/05/2021 11:19:37	brigitte	Send Brochure			
Scripted App	19/05/2021 17:04:11	brigitte	No Answer	ABC ORDER DEMO	ABCORDCampaign	ABCORList
Call Scheduled	19/05/2021 11:48:17	brigitte				
Customer Details Updated	14/05/2021 11:33:55	brigitte				
Scripted App	14/05/2021 11:33:14	brigitte	ABC Order	ABC ORDER DEMO	ABCORDCampaign	ABCORList
Outbound Managed Change State	20/04/2021 13:17:02	Admin	Call 11208 Changed State to Done			
Call Queued	20/04/2021 13:16:43	None	Call 11208 queued			

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Add Note
Close

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Customer History Events

Last updated June 2021

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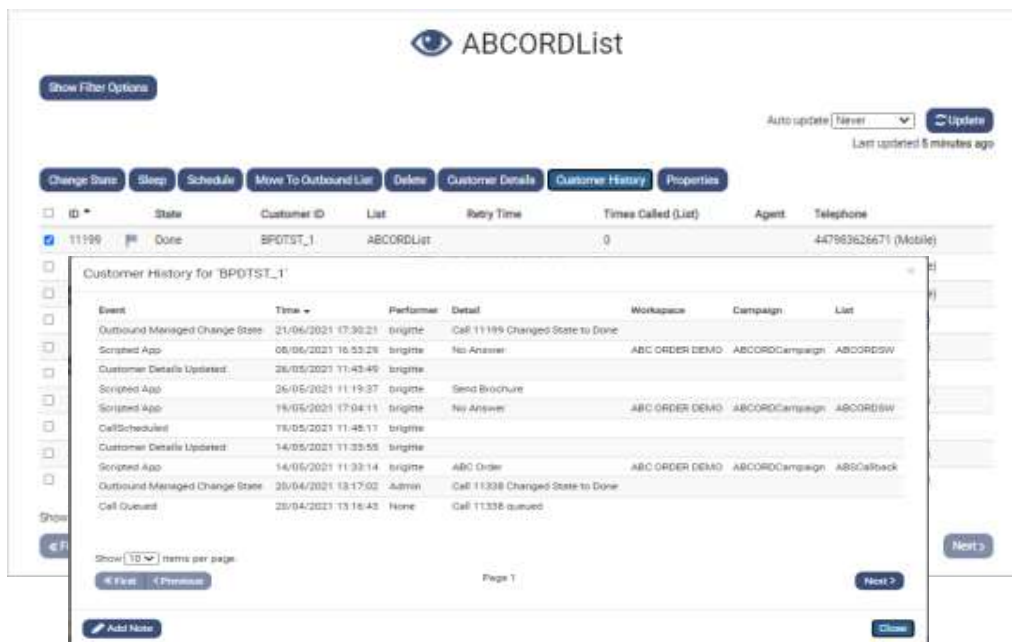
CRM ENTITY HISTORY EVENTS

The Customer History dialog provides a view into historical events associated with the selected Customer.

To open the History dialog in the Campaign Manager

- Select the list that contains the record that you wish to view and click the **Show Queue** button to display the queued records.
- Tick the box next to the relevant Customer ID and click the **Customer History** button to display the history events for the selected record.

The title of the history dialog reflects the record selected, e.g., Customer History for “BPDSTST_1”.



The screenshot shows the 'Customer History for BPDSTST_1' dialog. The main table lists the following events:

Event	Time	Performer	Detail	Workspace	Campaign	List
Outbound Managed Change State	21/06/2021 17:30:21	brigitte	Call 11199 Changed State to Done			
Scripted App	06/05/2021 16:53:28	brigitte	No Answer	ABC ORDER DEMO	ABCORDCampaign	ABCORDSW
Customer Details Updated	26/05/2021 11:43:49	brigitte				
Scripted App	26/05/2021 11:19:37	brigitte	Send Brochure			
Scripted App	19/05/2021 17:04:11	brigitte	No Answer	ABC ORDER DEMO	ABCORDCampaign	ABCORDSW
CallSchedulerr	19/05/2021 11:46:17	brigitte				
Customer Details Updated	14/05/2021 11:35:55	brigitte				
Scripted App	14/05/2021 11:32:14	brigitte	ABC Order	ABC ORDER DEMO	ABCORDCampaign	ABCORDBack
Outbound Managed Change State	20/04/2021 13:17:02	Admin	Call 11338 Changed State to Done			
Call Queue	20/04/2021 13:16:43	None	Call 11338 queued			

History events display date and time of the event, the name of the operator (performer) who initiated the action, with an associated entry in the Detail column providing more information, for example:

If the operator finished a call, the **Event** column of the customer history dialog will show “Scripted App”, with the **Detail** column displaying further information, e.g., the Call Result (‘General Enquiry’ or ‘Insurance Quote Send’), reflecting the name of the conclusion flag in the Scripted App that the agent went through when talking to the customer and completing the call.

- The event *I/B Call Failed*, or *O/B Call Failed* in the **Detail** column shows the **Abort Reason** that was selected at run time (‘Busy’, ‘No Answer’ or ‘Rescheduled’ etc.) when aborting the call.



For further information, please also check the **CRM Entity history table** for the selected CRM Prefix, i.e., CS_CRMPrefix_History (CS_ABCORD_History), where, for example, you can track changes to the CRM table (Customer Structure created/ Customer Structure Altered).

The **CSSHISTORYType table** contains a summary of EventID and EventTextType columns.

Table of Events in the Customer History Dialog

<i>Event</i>	<i>Detail column & Description</i>
Import Customer	Inserted/ Updated. Shows that a new customer record was inserted into the CRM Entity, or that an existing record was updated, for example using Selective Queueing Import.
Call Queued	Call (+ Queue ID) queued. Shows that the customer record was queued, i.e. placed into an outbound list.
Customer Details Altered	Shows that the customer record was modified.
Customer Details Updated	Webflow Toolbar. Shows that a customer record was edited and updated at run time, via the Contact option on the CTI/ Navigation toolbar in the Agent Portal.
New Customer Created	Shows that a new customer record was created.
Call Changed State	Call (+ Queue ID) changed state. Shows that the queue state of a call was changed, for example using bulk queue change. Changing the queue state using the <i>Change State</i> option in the OB Manager will only record the event in the database (CCSHistoryType table), without showing an entry in the CRM Entity History dialog.
Call Changed Priority	Call (+ Queue ID) Changed Priority. Shows that the priority (0-9) of the call has been changed, for example using bulk queue change.
Call Deleted	Call (+ Queue ID) deleted. Shows that the queued customer record was deleted from one of the outbound lists.
Call Recording	Call Recording.wav. Shows that call recording was used. To listen to the recording, use the <i>Noetica Call Player</i> .
Call Rescheduled	Call (+ Queue ID) Rescheduled. Shows that the record was rescheduled in the Outbound Manager by right clicking on the rescheduled record and selecting <i>Reschedule</i> from the drop-down menu to change the date & time of the call-back.
Call Scheduled	Call (+ Queue ID) Scheduled. Shows that the record was scheduled, either at run time using the Webservice Input action (via web), or in the Outbound Manager by right clicking on the queued record and selecting <i>Schedule</i> from the drop-down menu.
Call Slept	Call (+ Queue ID) slept. Shows that a record was slept, either using bulk queue change, or in the Outbound Manager by right clicking on the queued record and selecting <i>Sleep</i> , or by right clicking on the queued record and selecting <i>Change the Call Time</i> from the drop down menu.

Events in the Customer History dialog

<i>Event</i>	<i>Detail column/ Description</i>
Call Unslept	Call (+ Queue ID) unslept. Shows that the record was unslept in the Outbound Manager, either by right clicking on the sleeping record and selecting <i>Unsleep</i> , or by right clicking on the rescheduled record and selecting <i>Change to Queued State</i> from the drop-down menu.
Document	Shows the name of the document that was attached to the customer record. To view, double click on the Document icon.
I/B Call	Shows the Call Result of a completed Inbound call, i.e. the name of the Scripted App conclusion that the agent moved through at run time, when taking a call.
I/B Call Failed	Shows the Abort Reason selected when aborting the Inbound call, i.e. Disconnection, Wrong Number, Children On-Line etc.
I/B Call Failed (Popped Scripted App)	Shows the Call Result (name of conclusion) of the launched Scripted App the agent moved through at run time.
Manual Call	Shows the Call Result (name of conclusion) the agent moved through when finishing a manually opened call/ test call.
Manual Call (Popped Scripted App)	Shows the Call Result (name of conclusion) of the launched Scripted App the agent moved through when taking a manually opened/ test call.
Manual Call Failed	Shows the Abort Reason selected when aborting a manually opened/ test call.
Note	Shows the text of the note that has been added to the customer record at run time, when taking a call.
O/B Call	Shows the Call Result of a completed Outbound call, i.e. the name of the Scripted App conclusion that the agent moved through at run time, when taking a call.
O/B Call	Dialled + telephone number shows that the PD has dialled the telephone number displayed.
O/B Call (Popped Scripted App)	Shows the Call Result (name of the conclusion) of the launched Scripted App that the agent moved through at run time.
O/B Call Failed	Shows the Abort Reason selected when aborting the Outbound call, i.e. 'Busy', 'Rescheduled', No Answer, Unobtainable etc.

Events in the Customer History dialog

<i>Event</i>	<i>Detail column/ Description</i>
Operator Assigned	Operator assigned to call (+ Queue ID). Shows that the call has been assigned to be taken by a specific operator.
Operator De-assigned	Operator de-assigned to call + Queue ID. Shows that the operator was de-assigned (using bulk queue change), so any agent can take the call. De-assigning an Operator in the Outbound Manager by right clicking on the queued record and selecting the Operator Assign and <De-assign Agent> option from the drop-down menu will be shown as <i>Operator assigned to call + Queue ID</i> .
Predictive Dialler	Shows the actions taken by the PD, for example: Connected (+ telephone number) shows that the PD has connected the call. Missed Latest Time (+ telephone number), shows that the call was recycled as missed latest time as no agent was free to handle the call when it was due. Busy/ No Answer/ Unobtainable etc. shows the reason why the PD aborted the call. AnswerMachine (+ telephone number) event is generated if answer machine detection is used and the PD detects an answering machine. NC (+ telephone number), shows that a nuisance/ abandoned call was generated. Call QID (Queue ID) + telephone number is in DNC table, shows that the call is currently blocked in the Do Not Call (DNC) table. Lost Call (+ telephone number), event is generated if the CTI does not inform the PD of the call outcome.
Recycling Complete	Call (Queue ID) Recycling complete. Shows that the record has been dialled the set number of times, as specified in the Recycling rules, and the record will no longer be presented to the agents.