

Telemarket Management

Telemarket Management allows you to create a Telemarketing script for use in Call Centers. You are able to create Screens, Questions and Answers within the each Telemarket script and test them to ensure they display correctly. This section also explains when and how you can create a Response to a Telemarket for a Customer.

1. View Telemarkets for a selected Account

The View Telemarkets screen is displayed when the Telemarkets Management menu button is selected.

The User is presented with a table containing a summary of each Telemarket.

2. Create a Telemarket Script

The first step of creating a telemarket script is to give it a name and description so it can be easily identified.

After creating a Telemarket you can add display Screens by selecting it from the View Telemarkets section. To Create a screen simple specify a name and click create, the name should be either a number e.g. Screen 1, Screen 2 or a description of the screen e.g. Introduction. The Screens allow you to organise your Questions in to Logical sections.

When you have create a screen you can add Questions to it by selecting the Screen name or the "View" link in the operations column of the screens. This will display a screen which allows you to enter the question text e.g. Where where you born? and the type of response you desire.

Below are the types available types of questions.

- **Text** - This should be used when the response is a small amount of free text.
- **TextArea** - This should be used when there is a descriptive answer to a question.
- **Select List** - This should be used to display a drop down list of answers to the question.
- **Radio Buttons** - This should be used to display a small list of options e.g. Yes/No responses
- **Check Boxes** - This should be used when multiple answers are possible e.g. Name your

three favorite ...

- **Script** - This should be used as text that the Call Center staff should read out. e.g. I will now ask you questions about ...

Some of the Questions require response values, Select List, Radio Buttons and Check Boxes. These can be specified by selecting a question, or the view link in the Operation column. You can then add an answer to the question by entering a value and clicking the Add button.

Once you have created all your screens, questions and answers you can review them using the breadcrumbs at the top of the page or using the OK button to move up a level.

Intructions on how to reorganise the script and edit it are explained in the Edit a Telemarket Script section below.

3. Test a Telemarket Script

The Test Telemarket Section allows your to view a Telemarket as if you where creating a response. You can move forwards and backwards through the screens to ensure the Telemarket script is correct.

4. View a Telemarket Script

A Telemarket can be viewed by selecting it in the View Telemarkets table. You will then be able to select on of the tabs details below.

4.1. Screens tab

Screens tab - view Screens for this Telemarket

Displays:

- Screen Name
- View/Edit/Delete operations

4.2. Scripts tab

Scripts tab - view all Scripts (Questions) for this Telemarket

Displays:

- Screen Number & Question Number
- Question Text
- Question Type, e.g. Select List
- Possible Answers to the question

4.3. Activities tab

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Activities tab - shows all Activities associated with this Telemarket

Displays:

- Activity No.
- Activity Name
- Campaign Name
- Account Name
- Status of the Activity
- Step of the Activity e.g. Pending
- Start Date of the Activity
- End Date of the Activity

4.4. Responses tab

Responses tab - shows all Response to this Telemarket

Displays:

- Customer
- Response Step, if the response is in progress or finished
- View/Edit/Delete operations

5. Edit a Telemarket Script

To edit a Telemarkets Name and Description click the Edit Telemarket link the left hand navigation. To edit the Screen names view the Telemarket and then use the Edit link in the Operations column of the Screen table to change its name. Editing Questions and Answers is similar to editing screens, select a screen and then question and then click the edit link in the Operation column.

It is also possible to reorder screens, questions and answers by click the up (^) and down (v) arrows in the relevant table.

6. Delete a Telemarket Script

Note:

USE THIS FUNCTION WITH CAUTION. Telemarkats can be deleted but this has the affect of deleting ALL related Responses. It would be an extreme case where a Telemarket would be deleted, and if in doubt, use Edit Telemarket to change the telemarket status to Void. THIS ACTION CANNOT BE UNDONE.

Note:

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

7. Add/Remove a Telemarket Activity

This allows you to associated a Telemarket with an Activity (and the Activities Customers). This allows you to target Customers in the Activities Customer Lists. You can only associated a Telemarket if it, and the Activity, are in the Pending step.

Note:

Once a Telemarket is associated with an Activity you can not change the Telemarket step this is because the step is then controlled by the Activities steps.
Changing the step of the Activity to "Started" will be able to Run the Telemarket (see section below).

8. Run a Telemarket

This is used to Create a Customer Response for the selected Telemarket. This first step is to search for a Customer, you will be able to search Customers in any Activities and Customer Lists assigned to this Telemarket. You will also be able to search for all Customers within the selected Account.

Once you have retrieve the correct customer your will need to click the "Create" link in the operations column. This will create a response for this Customer and allow to you to answer the Questions in the Telemarket.

When answer a response you have several option on each screen.

- **<< Back & Save** - Save the answers and move to a previous screen, if available.
- **Save** - Save the answers and show the same screen again.
- **Cancel** - Do not save the answers return to Run Telemarket for the selected Customer.
- **Save & Next>>** - Save the answers and move to a next screen, if available.
- **Finish** - Save the answers and return to Run Telemarket for the select Customer screen (only shown on final Screen).

When you have Cancelled or Finished the Response you can Edit it by selecting the Customer and then Running the Telemarket again. It will display you a list of Responses and allow you to view, edit and delete them.

9. Change Step of Telemarket

An Telemarket can be in one of three Steps. This option allows you to change the current step to one of the following.

Steps

- **Pending** - When the Telemarket is in this step you can edit the Telemarket (Screens etc.)
- **Started** - When the Telemarket is in this you can Run it allows you to create Response for Customers.

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- Finished - When the Telemarket is in this step the Telemarket is readonly and can not be Responded to.

Note:

This option is only available if the Telemarket does not have any Activities assigned to it.