Project:   
Outcome Enhancements 2011-10-30

System enhancements centred on outcomes

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Version: 1-2

Date: 2011-10-30

# Overview

All n One’s Business Express allows campaigns to be built easily and quickly. The most powerful part of the campaign is its outcome. The outcome allows wrap up work to be completed automatically and allows for work flow / business process automation.

The project modifies the interface for adding and editing outcomes.

There is a significant amount of new functionality and enhancements to existing functionality.

# Version History

|  |  |
| --- | --- |
| **Version** | 1-2 |
| **Date** | 2011-11-23 |
| **Author** | Nick Wheeler |
| **Modifications** | Text Modifications |

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| --- | --- |
| **Version** | 1-1 |
| **Date** | 2011-11-22 |
| **Author** | Philip Lacey |
| **Modifications** | Addition of “Lookup Facilities” documentation  Addition of Version History  Removal of Mail Merge section documentation to Project: Record Display |

|  |  |
| --- | --- |
| **Version** | 1-0 |
| **Date** | 2011-10-30 |
| **Author** | Philip Lacey |
| **Modifications** | Initial version of the document |

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# Campaign Listing (Enhancement)

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|  |  |  |
|  | **Old Layout** | **New Layout** |

Within systems with many campaigns, the listing of campaigns became difficult. A new alphabetic system has been introduced to BE, that when a 30 campaign count is reached, the interface changes to the alphabetic system.

The change affects any part of BE that lists campaigns.

The alphabetic bar allows for easy collapsible listing



The shown letter will have a number in brackets after the letter. This will show how many campaigns starting with this letter are under this letter. Where no campaign begins with a specific letter the button will be whited out, with a 0 in the brackets.

If the campaign starts with a symbol or number, the group will appear below but no button will appear on listing bar. Pressing one of these buttons will open the group below to allow the campaign be selected. Where no bar button exists the group can still be opened by clicking the plus button to the left of the group.

The collapsible icons are consistent throughout BE including the menu systems collapsible groups.

The columns also show more information, including the campaign type and the Id of the campaign.

# Campaign Outcome Listing (Enhancement)

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|  |  |  |
|  | **Old Layout** | **New Layout** |

For campaigns with many outcomes the listing page for editing also becomes unwieldy. If a count of 24 outcomes is reached, BE will automatically swap the listing to use an alphabetic engine.

# Campaign Outcome Editing screen (Enhancement)

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|  |  |  | |
|  | **Old Layout** | | **New Layout** |

The editing screen was becoming very long. With each addition of new functionality the options screen was becoming longer. To help the management of the screen, collapsible sections were placed in the script. This allows all the existing options to be managed without the need to list all options. There is no deprecation in functionality of this change.

One section has been completely redone, All the closing field management items have now been grouped into one section called “Callback – Reminder / Appointment”

# Internal Communications (Enhancement)

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|  | **Old Layout** | **New Layout** |

The first change is the complete separation of the SMS and Email sections.

The old layout of internal communications linked the SMS and Email message bodies. This meant that both had to have the same body contents. This has been changed to allow for complete customisation of each message.

There are two new “From” fields now available.

“Internal SMS From”. This will allow the from address to be set on an outcome by outcome basis.

The same also applies to the email from address. Allowing customisation of the “Internal Email From” address on every outcome. If no address is specified, the campaign specified name will be used.

# External Communications (Enhancement)

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|  | **Old Layout** | **New Layout** |

As with Internal Communications, distinct separation between SMS and Email have now been made.

From fields for the SMS and Email have also been added. Where no From address is specified the Campaign default address will be used.

The To Field has also had extra information added to them to make identifying fields easier and more accurate.

The body of the SMS and the body of the email now have also been separated to allow for separate distinct messages to be transmitted simultaneously.

The body of the email was a rich text block to facilitate design of the body of the email but this feature did not consistently represent the layout of the email. The body box has been converted to a text area which will accept the HTML code.

The design of the email can be done in the communications centre.

# Instant Transfer – Task (Enhancement)

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|  | **Old Layout** | **New Layout** |

Previously creating a task was intrinsically linked to the internal communications which led to difficulties in understanding how the system worked. This item has been extracted to a section on its own. The section is further down the page and not part of the Callback / Appointment section.

The task can now also have its own subject and selectable fields.

# Instant Transfer – Campaign (New Feature)

This new section will allow data to be transferred from one campaign to another seamlessly. To facilitate this data transfer a data type in the campaign is required.

“Complex – Data Transfer” is a block containing the essential fields required to facilitate the transfer.



The setup configuration process works as follows:

1. A new “Complex Type – Campaign Transfer” is added to the second campaign (Orange)
2. A new outcome is added to the first campaign (blue) and is configured to point at the complex type in the second campaign (orange)
3. A new outcome is added to the second campaign (orange) and the Return Field is set as part of the outcome.

The operational usage works as follows:

1. Campaign one (blue), uses the new outcome, which transfers the data to campaign two.
2. The record in campaign two is processed and the outcome with the return field used transfers the data back to the first campaign using the original outcome settings.

A full training video demonstrating this setup and usage of this functionality will be available from the Personal Trainer video training system in BE.

# Instant Transfer – Campaign – Lookup Facilities

When a record completes it displays the ID of the record that was saved.



This allows the record to be quickly found in the destination campaign. On the lookup screen of the destination campaign, the second agent can easily find the transferred record.



The search will return all the records with the original record Id entered. This search may return more than one match, for records that have the same source Id from other campaigns.



The correct record is confirmed by examining the data transfer when you click into the record

