Making Your Business Run Better

Contact Centre Arena Training

Topic CC-1-3

Introduction to Blended Form Structure

Author: Philip Lacey

Version: 1-4

Date: 2017-08-14

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1 Introduction

1.1 Summary

This training document details the core form engine of bxp and what is possible.

1.2 Key Project Variables

Status Summary:	Training
Project Manager:	PL

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1.3 Contents

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1.4 Acronyms and Abbreviations

1.4.1 All n One

BXP	Bxp
BXPR	Bxp Release
SER	Service Enhancement Release

1.4.2 Training Document

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1.5 Key Stakeholders

1.5.1 All n One

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1.6 Version History

Version	**1-4**
Date	2017-08-14
Author	Robert Carson
Modifications	**New document template, update bxp naming, update to staff listing.**

Version	**1-3**
Date	2014-01-21
Author	Philip Lacey
Modifications	**Template correction and addition of further explanation information. Added all the scenarios.**

Version	**1-2**
Date	2014-01-20
Author	Carolann Diskin
Modifications	**Content corrections**

Version	**1-1**
Date	2014-01-20
Author	Philip Lacey
Modifications	**Completion of initial Lexicon content**

Version	**1-0**
Date	2014-01-17
Author	Philip Lacey
Modifications	**Initial draft**

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1.7 Learning Objectives

At the conclusion of this activity, participants should be able to:

Describe the structure created by the BXP Form Engine
Describe the key features this structure provides
Explain the difference between CDA and CCL
Understand and modify Field Mapping fields
Explain and demonstrate how an Inbound contact becomes an Outbound contact

NOTE: Bxp has developed its own lexicon and we use it throughout this document, and we therefore include a section (2.3) to aid your understanding. There are also exercises and multiple choice support tests where appropriate.

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2 Theory

2.1 Recommended prerequisite training

CC-1-1 Introduction to Bxp vX-x

CC-1-2 Introduction to Contact Centres vX-x

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2.2 Standard training approach

This document is broken into four sections:

- Section 1 provides some document management
- Section 2 provides theory on the training area including a Lexicon
- Section 3 provides scenarios and worked examples to highlight what is to bxp accomplished
- Section 4 provides instructional procedures associated with the scenarios

This training is appropriate to the level stated at the start of the document and it forms part of the All n One Learning Departments curriculum for BXP. This curriculum is available in the document *BXP Learning Department vX-x* where X is the major version and x is the minor revision.

In this document a procedure is identified as [Procedure X] where X is the number of that procedure. The procedures can be found in Section 4 of the document or in the indicated document.

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2.3 Lexicon

2.3.1 Previously explained terms

2.3.1.1 From CC-1-1 Introduction to Bxp

All n One is the name of the company that developed and delivers Bxp.

Bxp (BXP) is the flagship product of All n One and is a pure SaaS solution.

BXP Client. An organisation that has purchased an instance of BXP.

User. An individual who uses BXP.

Module. A set of related functionality grouped together for convenience. BXP has a number of modules available to BXP clients, some of which are mandatory. For example, System Access Management which contains all the system security functions.

Section. A subsection within a module where the grouping of functionality is further grouped, for convenience.

Function. An individual function within a section or module

System Champion. A person within the BXP Client organisation who has primary responsibility for the management of BXP and its content. Users within the BXP client requiring will bxp directed to the System Champion.

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2.3.1.2 From CC-1-2 Introduction to Bxp

Process - any activity or set of activities that uses resources to transform inputs into outputs can be considered a process.

Procedure - A procedure outlines how to perform a process

Work Instructions - A work instruction describes how to perform a task, which is a more detailed portion of the procedure such as "Completing a PO" or "Ordering supplies".

There are a number of services which a contact centre can offer. The primary definition of the services stems from which party is doing the contact. If a customer is contacting the centre, it is called **inbound** activity. If the agent is contacting the customer it is called **outbound** activity.

One paper based form, constitutes interaction with one customer. In a computer system, that one form is called a **record**. If a customer calls in for a second time, you might have one record, but there would be two entries for the two **contacts**. Reporting on records and contacts is very important to a contact centre. Every record will have a **contact history**, which will list all the contacts for that record.

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2.3.2 Form Structure

Data in BXP is stored in a collection of database tables which can be referred to as a campaign or database but is called a "**Form**" by All n One. Every form has its own unique id known as a **Form Id**.

The data in these forms is managed through a number of modules:

- Inbound Contact
- Outbound Contact
- Case Management
- Testing Centre
- Quality Assurance
- Survey

The management of all forms is done through the **Form Management** module.  Each form has its own unique Id which is represented as X in this document. In every form in BXP, there are two key separate elements: **Records** and **Contacts**.

A record is a set of data for one element, like a customer. You can store as many pieces of information (**fields**) as you like for one record. Fields in a record usually contain:

- Id — A unique reference for the customer
- Firstname — The firstname of the customer
- Surname — The surname of the customer
- Home Phone — The home phone number for customer
- Work Phone — The work contact phone number for the customer
- Mobile — The mobile phone number for the customer
- Email — The primary contact email address for the customer

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Looking at the following table of records

Id	Firstname	Surname	Home Phone	Work Phone	Mobile	Email
1	Nick	Wheeler	01 1234567	01 4294000	353871231231	nick.wheeler@allnone.ie
2	Chris	Thomson	01 2345678	01 4294000	353871231232	chris.thomson@allnone.ie
3	Philip	Lacey	01 3456789	01 4294000	353861231230	philip.lacey@allnone.ie

Each line of information is a record. BXP builds a table to store these records. A table can also be considered like an Excel spreadsheet. Each row in the spreadsheet is a record.

BXP calls these records **Campaign Data** records (**CDA**).

BXP can also capture contacts with these records. Each contact with a customer is stored in a separate table just for contacts. The contact is linked back to the appropriate record by its CDA Id. So for a sample of three contacts with Nick Wheeler, the contacts table might contain:

Id	CDA_Id	Start	End	Agent	Outcome	Comment
1	1	2014-01-01 13:00:00	2014-01-01 13:05:00	Agent 1	Interested	Wants more info but later
2	1	2014-01-01 14:30:00	2014-01-01 14:36:00	Agent 2	Call back	Rang back and gave info
3	1	2014-01-02 10:05:00	2014-01-02 10:12:23	Agent 1	Sale	Called and sold service

BXP calls these records **Campaign Calls** records (**CCL**).

Each CDA may have anything from none to many CCLs.

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2.3.3 Field types

There are a number of types of information you can store in fields. A field with a line of text with numbers, letters and characters is called a **string**, which can be abbreviated to **str**. If the field only contains whole numbers it can be called an **integer** or **int** for short. If the field contains a fraction i.e. 1.234 then it is known as a **float** or **flt**.

If the field contains a date and time it can bxp abbreviated to **dte**. BXP always uses **universal date time format** for consistency and sorting. Sorting a date stored in 1/4/2014 and 3/1/2013 will sort the dates incorrectly as:

- 1/4/2014
- 3/1/2013

Universal date time format ensures that it sorts properly.

- 2013-01-03
- 2014-04-01

Also sometimes American dates would mean 1/4/2014 is the 4th of January. So for clarity universal date time format is always consistent and precise.

A **basic type** of field in BXP is one field, where only one value is required. E.g. Favourite colour, Gender.

A **complex type** of field in BXP is a combination of a number of basic fields. E.g Name, made up of Title, Firstname, Initial, Surname or Irish Address, Address 1, address 2, address 2, address 3, county, country.

BXP has many basic and complex types.

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2.3.4 CDA system fields

You can have as many fields as you like in a CDA record. This allows you to build any form you need. When you create a form in BXP, BXP will add a number of fields for you for system use purposes.

- Id This is the unique CDA Id.
- Status This is a word to describe what status the record is at.
- Last Comment If we have interacted with the record before, then this is the last comment on it.
- No of Attempts This is the total number of CCLs stored for the CDA so far. Starts at 0.
- Staff Id The Id of the last BXP user to interact with the record.
- Last Date Time The last date and time the record was interacted with, or loaded into the system.

As BXP is a computer system, it needs to name the fields without any chance of there being repetition. For this reason the system uses a unique file naming system. First let's look at the unique system fields. Using the three letter abbreviations described previously:

intCDA_25_Id means, integer, CDA record, form 25 and the Id field
strCDA_25_Status means, string, CDA record, form 25 and the Status field
strCDA_25_Comments means, string, CDA record, form 25 and the last comment
intCDA_25_NoOfAttempts means, integer, CDA record, form 25 and the number of CCLs for this CDA
intCDA_25_StaffId means, integer, CDA record, form 25 and the last staff to interact with the CDA
strCDA_25_LastDateTime means, string, CDA record, form 25 and the last date time it was interacted with

There is another field strCDA_25_ which is used to store score information for tests, surveys and quality assurance scores.

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2.3.5 CDA user fields

Every field that is added by the user takes a similar format:

strCDA_25_field_0_0

As BXP does not know what content you are going to put in the fields it must set every field to be a string field by default. Dissecting the elements of the field name:

- str string content
- CDA a CDA record
- 25 form 25
- field field, this is a user defined field
- 0 sub part 0 (described in the coming paragraph)
- 0 question identifier

Every question that is added to a form will increment the field number by 1. Here is an example of four basic type fields

- strCDA_25_field_0_0
- strCDA_25_field_0_1
- strCDA_25_field_0_2
- strCDA_25_field_0_3

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A complex type such as name, which has sub parts, causes the sub part number to increase.

The Complex – Title Block question type has name has four parts, title, firstname, initial and surname. Continuing with our example, the next question in sequence would bxp question 4, so the first part becomes

- strCDA_25_field_0_4 Title

That is now a storage field for Title. But we need storage fields for firstname, initial and surname which become increase the sub part number.

- strCDA_25_field_1_4 Firstname
- strCDA_25_field_2_4 Initial
- strCDA_25_field_3_4 Surname

So our worked example would become

- strCDA_25_field_0_0
- strCDA_25_field_0_1
- strCDA_25_field_0_2
- strCDA_25_field_0_3
- strCDA_25_field_0_4
- strCDA_25_field_1_4
- strCDA_25_field_2_4
- strCDA_25_field_3_4

There are three ways of creating the contents of a CDA record.

- **Data Entry**
- **Importing data** from a file
- **Transfer of data** from an external source, such as a website or another form.

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2.3.6 Field Mapping

The system fields whilst being unique and ok for the system to manage are not very user friendly. It also makes for reporting and system setup a matter of user memory. To help this, BXP implements a **field mapping** system which allows use of understandable titles on every CDA field. Field mapping is key in a number of areas especially when loading data from a file. In Microsoft Excel if the column heading is the same word exactly as the field mapping BXP is able to load the data from the column directly into the matched field.

A field mapping for the above field list might bxp:

Field Name	Mapped Name
intCDA_25_Id	CDA Id
strCDA_25_Status	Status
strCDA_25_Comments	Last Comment
intCDA_25_NoOfAttempts	Number of Attempts
intCDA_25_StaffId	Last Staff id
strCDA_25_LastDateTime	Last Date and Time
strCDA_25_field_0_0	Gender
strCDA_25_field_0_1	Favourite Colour
strCDA_25_field_0_2	Plays Golf
strCDA_25_field_0_3	Package Interested In
strCDA_25_field_0_4	Title
strCDA_25_field_1_4	Firstname
strCDA_25_field_2_4	Initial
strCDA_25_field_3_4	Surname

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2.3.7 CCL fields

The contacts table is completely system generated and has a number of key fields. Every contact with a CDA record is recorded as a CCL record. The most important CCL system fields are

intCCL_25_Id	A unique CCL Id
intCCL_25_StaffId	The Id of the staff member logging the contact
intCCL_25_CDAId	The CDA Id for the contact
dteCCL_25_StartDateTime	When the contact was started
dteCCL_25_EndDateTime	When the contact was ended
strCCL_25_Outcome	The outcome / disposition code used
strCCL_25_MediaCode	The media code captured which was the reason for the contact
strCCL_25_Comments	The comments logged for this contact

There are many more fields in a CCL which are used for various system functions.

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2.3.8 Scripts

A **workflow** is a sequence in which a procedure is delivered. To help deliver a workflow a **script** can provide wording to guide the agent on how to fill in the fields of the form. From top to bottom a script can help an agent be as efficient as possible. BXP does not just display fields on screen to be filled in, but instead integrates them into a script. The additional information of the script can improve quality and efficiency of delivery of the procedure.

Depending on how a script is used, it can be delivered in a **foreign language**. E.g. French or Spanish. The structure and operation of the script is universal regardless of language. The customers can also be in different **time zones** and BXP can help modify the script appropriate to the time zone that the customer is in.

A script has a number of key elements for a contact centre. If dealing with a customer how the contact is addressed is primary. This is called the **Opening Script**. The opening script is used as a statement delivered by the agent and set up to deal with the contact in a certain way.

The fields that need to be filled in are then presented to the agent in sequence. Usually fields are presented in the form of **questions**. E.g. Can I get your name please? For this reason, all fields in the script are wrapped in questions. It may be helpful to add **notes** to the question, which are direction for the agent on how to deliver the question and to answer further queries that may occur about the question, e.g. When filling in the mobile number please use the international format e.g. 3538X xxx xxxx.

The penultimate question is for the agent. How did the contact finish? This is the **outcome** of the contact and is vital to saving the contact. The outcome can perform a number of tasks. The first task is to put up **a custom outcome script** for the agent that usually outlines what to say to the customer for this particular outcome and even instructions on what will happen next. The outcome can also perform custom **validation** on fields to ensure that certain fields are filled out with specific content before the record will save.

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At the very end of the script is the **closing script** which is how every contact should be closed out.

At the end of the script when "Save Details" is clicked. The CDA is created and a CCL is created and associated with the CDA. The CDA system fields of last agent, last comment and last date and time are all updated and the number of attempts is incremented by 1. This creation process is managed by BXP and is called "**saving the record**".

Depending on what rules are set up on the outcome a number of other processes may also be carried out at this point.

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2.3.9 Question management

As every field is managed with other setup information, a field is managed as a question. BXP stores a lot of information for each question. Every field creates a question. For complex types the primary configuration is stored on the first field. There are a number of key configuration pieces of information for each question

The **content type** of the question is detailed in the next section.

As the field is delivered in a script, it needs a question. The wording of the question can make the efficiency of a script more effective.

To support the question, the script draws notes underneath the question in a different colour.

The **order** of the question that is displayed in the script is also stored in the question.

It is possible to put a custom colour on the background of the question to make it stand out called the **background colour**.

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2.3.10 Basic question types

Each question has a **question type**. It is either a **basic type** or **complex type**. Basic types have one storage field. Complex types have multiple storage fields.

Basic types:

********* Basic - Construction Types *********

Basic - Text Box	A simple one line text box
Basic - Text Area	A many line text box
Basic - Section Header	A script dividing block for grouping fields
Basic - Tab Button Header	An auto created list of buttons for jumping to sections
Basic - Check Box	A question type that displays multiple answers and allows multiple selections
Basic - List / Menu	A question type that displays one answer and allows one selection
Basic - List / Multiple	A question type that displays a limited amount of answers and will allow multiple selections
Basic - Radio Button	A question type that displays multiple answers and allows only one selection
Basic - Date Box	A type that allows the user select a date and time in universal date time format
Basic - Time Listing Box	A drop down list of times separated by 15 minutes
Basic - Website Text Box	A text box for entering a website address, with a special button to open the website that is entered in a new window
Basic - Email Text Box	A text box for entering an email address, with a special button to open the computers default email program to send an email to the entered address.
Basic - Colour Selector	A box that provides the ability to choose a colour and stores the HEX code of the colour. For more info http://www.w3schools.com/html/html_colors.asp
Basic – Password	A text box for entering a string, but the contents will be hidden

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Basic - Number Box A selection box that is right formatted which is typically used for monetary amounts

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There are drop down lists (List /Menu) which are commonly used. These lists are prebuilt in BXP to save typing in the values and configuring the List / Menu.

********* Basic - Type Listings *********

Basic - Agreement Types   List menu with Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.
Basic – Probability   List menu with Very unlikely, unlikely, neutral, likely, very likely.
Basic – Quality   List menu with Very poor, poor, neutral, good, very good.
Basic - Satisfaction Level   List menu with Very unsatisfactory, unsatisfactory, neutral, satisfactory, very satisfactory.
Basic - True False Block   List menu with True and False
Basic - Yes No Block   List menu with Yes and No
Basic – NetPromoterScore   List menu with number listing from 0 to 9 as per NPS. For more info http://en.wikipedia.org/wiki/Net_Promoter

There are many numeric listings that would take a long time to fill out. BXP fills them out quickly on the users behalf.

********* Basic - Numeric Listings *********

Basic - 1 to 5	List menu with 1 to 5 inclusive
Basic - 1 to 10	List menu with 1 to 10 inclusive
Basic - 1 to 20	List menu with 1 to 20 inclusive
Basic - 1 to 50	List menu with 1 to 50 inclusive
Basic - 1 to 100	List menu with 1 to 100 inclusive
Basic - 1 to 500	List menu with 1 to 500 inclusive

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Like the numeric listings, for surveys and qualitative forms, **Not Applicable** (**NA**) may also be possible. NA is included in the numeric listings with these types.

********* Basic - Qualitative Listings *********

Basic - 1 to 5 NA	List menu with 1 to 5 inclusive with NA
Basic - 1 to 10 NA	List menu with 1 to 10 inclusive with NA
Basic - 1 to 20 NA	List menu with 1 to 20 inclusive with NA
Basic - 1 to 50 NA	List menu with 1 to 50 inclusive with NA
Basic - 1 to 100 NA	List menu with 1 to 100 inclusive with NA
Basic - 1 to 500 NA	List menu with 1 to 500 inclusive with NA

Numeric listings can also go from 0 to a max number.

********* Basic - Numeric Listings - O to X *********

Basic - 0 to 5	List menu with 0 to 5 inclusive
Basic - 0 to 10	List menu with 0 to 10 inclusive
Basic - 0 to 20	List menu with 0 to 20 inclusive
Basic - 0 to 50	List menu with 0 to 50 inclusive
Basic - 0 to 100	List menu with 0 to 100 inclusive
Basic - 0 to 200	List menu with 0 to 200 inclusive
Basic - 0 to 500	List menu with 0 to 500 inclusive

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There are a number of drop down lists which are available that are system managed. These lists are user to save form builders time from having to manually populate lists.

********* Basic - Common List Types *********

Basic - Broadband Supplier	List / menu with the broadband suppliers of Ireland
Basic - Contact Type	List / menu with the different ways customers can contact
Basic – Country	List / menu with the countries of the world
Basic – County	List / menu with the counties of Ireland
Basic – FileTypes	List / menu with numerous different file types
Basic - Garda Stations	List / menu with the Garda Stations of Ireland
Basic – Languages	List / menu with the languages of the world
Basic – Nationality	List / menu with the nationalities of the world
Basic - School Class Type – Ireland	List / menu with the classes of the education system of Ireland
Basic – Solicitors	List / menu with a list of solicitors in Ireland
Basic - Title	List / menu with name titles as per the British Airways list.

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From various modules of BXP, BXP clients can populate lists. These lists are from other modules in BXP.

********* Basic - Client List Types *********

Basic – Brand	List / menu with the brands from the Product module
Basic - Department	List / menu with the departments from the System Access Management module
Basic - Manufacturer	List / menu with the manufacturers from the Product module
Basic - Media Codes	List / menu with the media codes from the Media Management module
Basic - Media Schedule	List / menu with two week hence limited media codes from the Media Management module
Basic - My Team Member	List / menu with BXP users in the same security group from the System Access Management module
Basic - Product	List / menu with the products form the Product Management module
Basic - Project	List / menu with the projects from the Task Management module
Basic - Retailer	List / menu with the retailers from the Product Management module
Basic - Skills	List / menu with the skills from the Time and Working Hour management module
Basic - Staff	List / menu with the live users from the System Access Management module

There is also a useful ability to list and manage contents from other forms. This ability to use other forms allows BXP clients to manage custom lists. Cross Campaign listing types, allow the details from another forms to be presented.

********* Basic - Cross Campaign Type *********

Basic - Campaign Listing	List / menu presenting the contents of another form. This is ideal for a limited amount of records in the secondary form.

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Basic - Campaign Search	A lookup engine system to allow selection of a record, which is ideal with the secondary form that has many records. A single list would be impractical.

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2.3.11 Complex question types

2.3.11.1 Introduction

Complex types combine a number of single fields into a single question. This can greatly speed up the building and management of forms.

2.3.11.2 Complex - Title Block

4 fields. Simple Title and three text boxes.

Title, Firstname, Initial, Surname

2.3.11.3 Complex - Phone - Home, Work, Mobile

3 fields. Three text boxes

Home Phone, Work Phone, Mobile

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2.3.11.4 *Complex - Email and web data*

2 fields. One simple email and one simple website box.

Email address and website address

2.3.11.5 *Complex - Address Block (1, 2, 3, Post Code, Country)*

5 fields. Three text boxes, simple list of counties, simple list of countries

Address 1, Address 2, Address 3, County, Country

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2.3.11.6 Complex - UK Address Block (1, 2, 3, 4, 5, Post Code)

6 fields. Six text boxes

Address 1, 2, 3, 4, 5 and Post code

2.3.11.7 Complex - USA Address Block (1, 2, 3, 4, 5, Country)

6 fields. 5 text boxes and a drop down list of countries

Address 1, 2, City, State, ZIP, Country

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2.3.11.8 Complex - BEmail Block (DateTime, From, To, CC, Subject, Body)

6 fields. 5 text boes and 1 text area.

DateTime, From, To, CC, Subject, Body

2.3.11.9 Complex - Currency & Amount

2 fields. List of currencies, simple number text box.

Currency and amount

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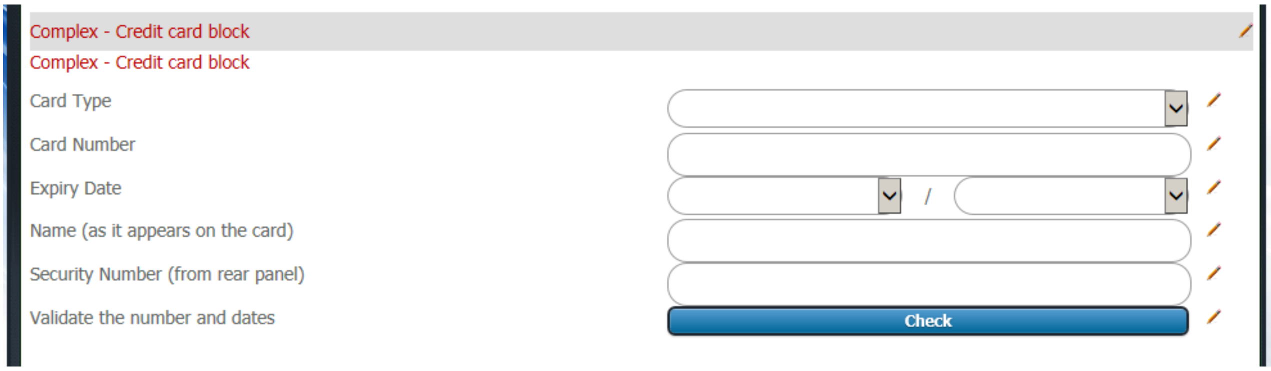
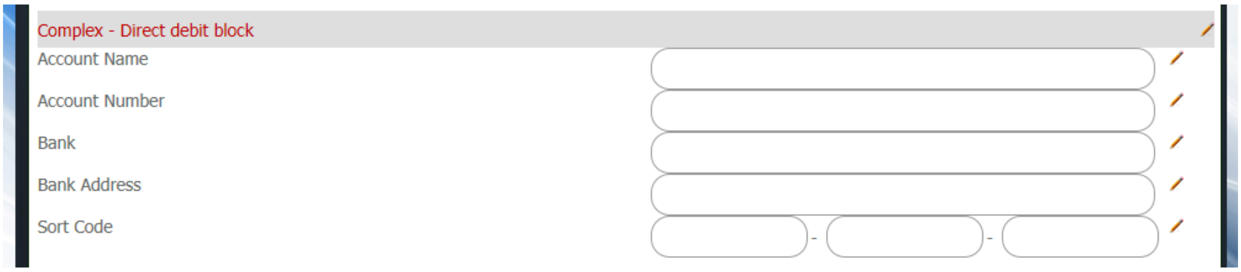
2.3.11.10 Complex - Credit Card Block



6 fields. Card type list, text box, month list, year list, two text boxes.

Card type, Card number, Expiry Month, Expiry Year, Name on the card, CCV details

2.3.11.11 Complex - Direct Debit Block



7 fields. 7 text boxes.

Account name, account number, bank, bank address, sort code.

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2.3.11.12 Complex - Google Map

2 fields. 2 text boxes

Latitude, Longitude. Top button provides current coordinates. Bottom button maps coordinates on a google map.

2.3.11.13 Complex - Campaign Transfer

6 fields. When transferring a record from one form to another, there are a number of system fields that need to be transferred. These six fields are used for the data transfer. There is no presentation of these fields on screen, just a line of text appropriate to the type of transfer.

2.3.11.14 Complex - Contact History Block

1 field. The contact history is provided behind a button on the script. It can be necessary sometimes to display the contact history inline in the script. This question type will draw the contact history for the record in the script.

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2.3.12 Outcome management

It is possible to turn outcomes on and off using the “**Active**” selection box. Outcomes which are true will appear at the bottom of the script.

Like the questions it is possible to show the agent a different line of text, i.e. the data that is stored in the record and contact. **Description** is what is shown to the agent and **value** is what is stored in the database.

Each outcome can display a custom piece of scripting to help direct the agents as to what to say to the customer and also what may happen next in the process. The script can be delivered in any language.

For reporting and operational procedures an outcome can represent a final contact activity called a “**Display Category**”. “Sale” or “Not Interested” are strong examples of where activity is “**complete**”. If the outcome is “callback later” this would be an example of “**incomplete**” and that there is more work to do. The setting of this field is very important in outbound activity.

There is extensive reporting available in BXP and the **Report Grouping 1** and **Report Grouping 2** fields are used for some of these reports.

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2.3.13 Security Management

In BXP there is a clear distinction between functional access and content access. The "Inbound Contact" module and the "My Data" section may be available to many users. No logging of records in a form is possible until access is granted and it must be explicitly granted. When a user creates a form, they are given immediate access to that form. No other user will have access to that form until granted.

A form must be Active and within date for it to appear in the Inbound Contact and Outbound Contact modules, as well as the user requiring the granting of security access. This is set in the "Primary Options" of the form.

The granting of content access to the form is done through the "System Access Management" module "**Security – Content Access**" section. The simplest method of giving a user access to a form is to use the "**Form - Single Add User by Form**"

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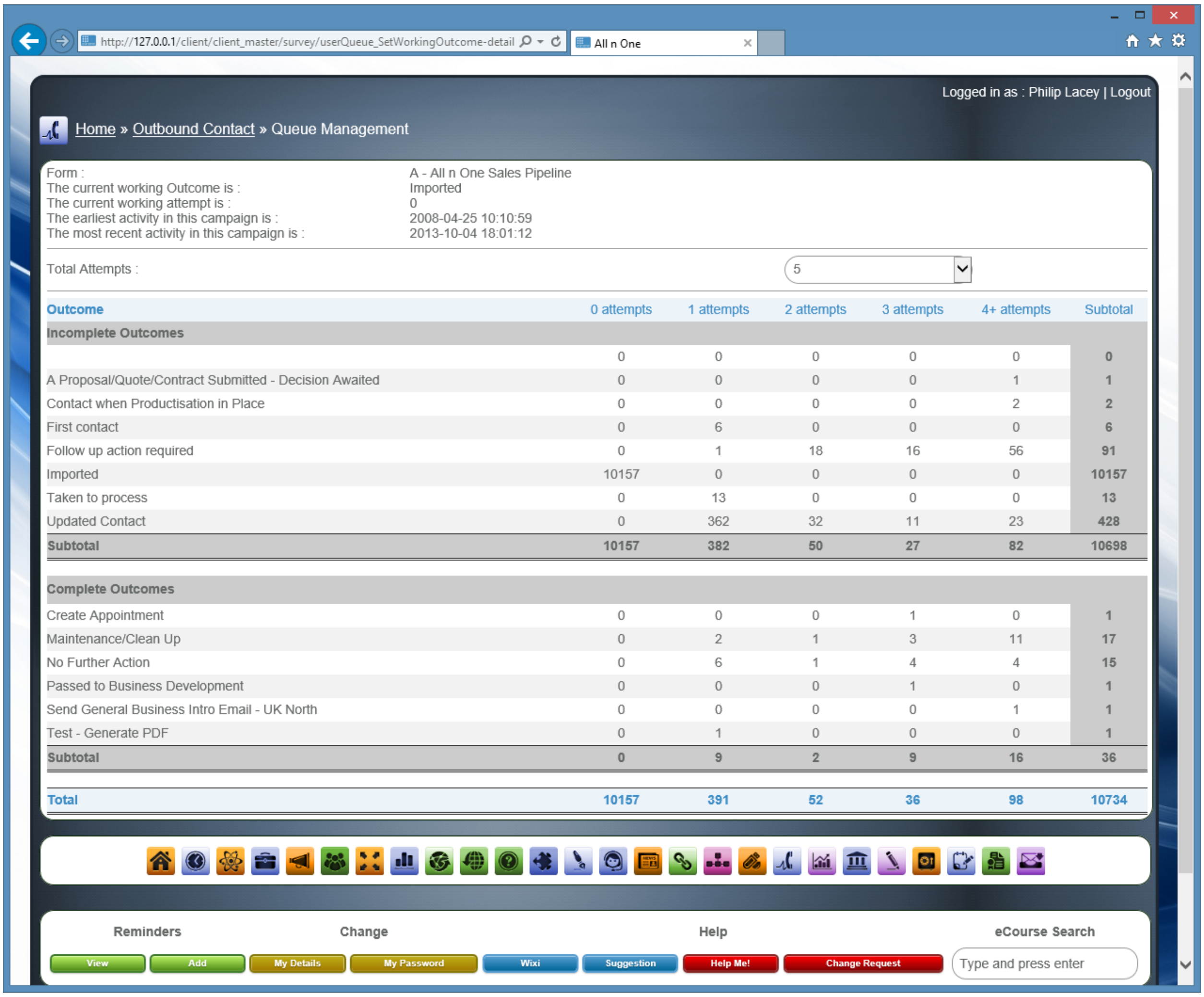
2.3.14 Stack Management

As records are stored in the CDA table, two of the system fields “Status” and “No of Attempts” are used for the management of outbound activity. BXP creates a grid with Status on the Y axis and No of Attempts on the X axis. The “Complete” and “Incomplete” key word that is set on the Outcome display category is extremely important here, as two **display groups** will use the keyword.



Outcome	0 attempts	1 attempts	2 attempts	3 attempts	4+ attempts	Subtotal
Incomplete Outcomes						
	0	0	0	0	0	0
A Proposal/Quote/Contract Submitted - Decision Awaited	0	0	0	0	1	1
Contact when Productisation in Place	0	0	0	0	2	2
First contact	0	6	0	0	0	6
Follow up action required	0	1	18	16	56	91
Imported	10157	0	0	0	0	10157
Taken to process	0	13	0	0	0	13
Updated Contact	0	362	32	11	23	428
Subtotal	10157	382	50	27	82	10698
Complete Outcomes						
Create Appointment	0	0	0	1	0	1
Maintenance/Clean Up	0	2	1	3	11	17
No Further Action	0	6	1	4	4	15
Passed to Business Development	0	0	0	1	0	1
Send General Business Intro Email - UK North	0	0	0	0	1	1
Test - Generate PDF	0	1	0	0	0	1
Subtotal	0	9	2	9	16	36
Total	10157	391	52	36	98	10734

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The top display group includes all the CDAs that have a current status, and an outcome that has a display group that is incomplete.

The bottom display group includes all the CDAs that have a current status, and an outcome that has a display group that is complete.

In the example shown, there are 10,157 fresh records to be contacted that have not been contacted at all, i.e. "Imported" and "0".

There are 6 records that are "First Contact" and "1" attempt. These are records that have been contacted but need more work.

There are 4 records that are "No Further Action" and "3" attempts. These are records with three previous contacts and the last contact ended with the agent selecting "No Further Action".

Clicking any one of the groups of numbers will add that group of records to the queue to be contacted next. It is possible to **queue** multiple stacks. When a stack gets to 0 the system will move to the next **queued stack**

There is a report available in BXP which allows the user to see what stacks are queued and in what order they will be processed. This is referred to as **viewing the calling stack**.

The process of viewing and queuing stacks to work on is known as **stack management**.

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3 Scenarios

3.1 Overview

As with all of the scenarios listed below, the primary consideration is hands-on ability to use BXP. All of the terms in the Lexicon that are used in this training permeate subsequent training.

NOTE: Different browsers and versions will show different layouts and options so this learning document will use a reference browser to demonstrate the How To scenarios

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3.2 Create a blended form

BXP provides a console to help users navigate the steps of construction of a form:

1. Log into the Demo System [CC-1-1 3.2]
2. From the module listing bar select Form Management 
3. Open the Form – Primary Management section and choose “Form – Create”
4. Choose “Blended” from the Type drop down list
5. Modify the Name to something unique that you will remember
6. Click “Create Form”
7. From the console on the left hand side in the “Phase 3 – Campaign Operation” section choose “Add a Record”

To confirm you are working on the right form, the top left of the console will display the type and name of the form you have created.

3.3 Modify the Opening and Closing Scripts

1. Log into the Demo System [CC-1-1 3.2]
2. From the module listing bar select Form Management
3. Open the Form – Primary Management section and choose “Form – Edit”
4. Select the Form you wish to edit, e.g. the Form created in 3.2
5. In the console on the left hand side, in the “Phase 1 – Primary Setup” section, choose “Vertical Delivery Options”
6. On the right hand side modify “Opening Instructions” and “Closing Instructions” as required.
7. Click “Update Vertical Settings” to save your changes
8. From the console on the left hand side in the “Phase 3 – Campaign Operation” section choose “Add a Record” to view your changes

There are many potential configuration settings for any form. A complete list of all settings with the limitations of the console can be found

1. Log into the Demo System [CC-1-1 3.2]
2. From the module listing bar select Form Management
3. Open the Form – Primary Management section and choose “Form – Advanced Settings”
4. Select the Form you wish to edit, e.g. the Form created in 3.2
5. Open the Instructions section
6. Modify the Opening and Closing Instructions as required
7. Click “Update” to save the changes
8. From the module listing bar select Inbound Contact
9. From the “My Data” section, choose “Take an inbound contact”
10. Select the Form you have updated, e.g. the Form created in 3.2
11. You can now view the changes you have made.

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3.4 Add a question

1. Log into the Demo System [CC-1-1 3.2]
2. From the module listing bar select Form Management 
3. Open the Form – Primary Management section and choose “Form – Edit”
4. Select the Form you wish to edit, e.g. the Form created in 3.2
5. In the console on the left hand side, in the “Phase 1 – Primary Setup” section, choose “Question Addition”
6. Choose “Basic – Text Box” from the Question Type
7. Type in “What is your favourite colour?” into the Question
8. Type in “Please ask the customer for a real colour”
9. Click “Add Question”
10. From the console on the left hand side in the “Phase 3 – Campaign Operation” section choose “Add a Record” to view your changes

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3.5 Edit a question

1. Log into the Demo System [CC-1-1 3.2]
2. From the module listing bar select Form Management
3. Open the Form – Primary Management section and choose “Form – Edit”
4. Select the Form you wish to edit, e.g. the Form created in 3.2
5. From the console on the left hand side in the “Phase 3 – Campaign Operation” section choose “Add a Record”
6. On the script on the right hand side there is a pencil icon to the right of every question.
   Click the pencil icon to the right of the question you wish to edit. E.g. The “What is your favourite colour?” question from 3.4
7. From the Question Type, choose “Basic – List / Menu”
8. You can also modify the “Question” and “Notes” fields if desired.
9. Click “Update question” at the bottom of the screen.
10. You will bxp returned to your script to view your changes.

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3.6 Change the values in a drop down list

1. Log into the Demo System [CC-1-1 3.2]
2. From the module listing bar select Form Management 
3. Open the Form – Primary Management section and choose “Form – Edit”
4. Select the Form you wish to edit, e.g. the Form created in 3.2
5. In the console on the left hand side, in the “Phase 1 – Primary Setup” section, choose “Answer Values - Modify”
6. The screen on the right will list all the questions whose contents can be modified. Select a question to modify the answers of. E.g. The “What is your favourite colour?” question from 3.5
7. You can edit existing text and values in the boxes displayed. E.g. Change the word “test” to “blue” and the value “text” to “blue”
8. In the text boxes below “If you need to add a new item, simply fill in the boxes below. Leaving them blank will not add a new item.” Type “green” in the Text textbox and type “green” in the Value textbox.
9. Click “Update answers” and the page will refresh.
10. Repeat the procedure in step 8 but add “red” to both the Text and Value textboxes. Click update answers
11. Click update answers again making no further modifications.
12. From the console on the left hand side in the “Phase 3 – Campaign Operation” section choose “Add a Record” to view your changes

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3.7 Manage the field mapping

1. Log into the Demo System [CC-1-1 3.2]
2. From the module listing bar select Form Management 
3. Open the Form – Primary Management section and choose “Form – Edit”
4. Select the Form you wish to edit, e.g. the Form created in 3.2
5. In the console on the left hand side, in the “Phase 1 – Primary Setup” section, choose “Field Mapping Management”
6. For each field in the column “New Field Name” ensure each field has a unique name that indicates the contents of that field.
7. Click “Update Mappings” when complete to save the changes.

Please make sure there are no leading or trailing spaces in the names as this can cause data loading issues later on. Leading spaces are space characters before your name. Trailing space characters are spaces after the name.

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3.8 Add an outcome

1. Log into the Demo System [CC-1-1 3.2]
2. From the module listing bar select Form Management 
3. Open the Form – Primary Management section and choose “Form – Edit”
4. Select the Form you wish to edit, e.g. the Form created in 3.2
5. In the console on the left hand side, in the “Phase 1 – Primary Setup” section, choose “Question Management”. The console options on the left hand side will change
6. In the console on the left hand side, in the “Section 3 - Outcomes” section, choose “Outcome Add”.
7. Type in value “Not Interested”
8. Type in description “Not Interested”
9. Type in script “Thank you for taking my call today. If you need anything else our website is available.”
10. Click “Add Outcome” from the bottom of the screen
11. In the console on the left side click the “Add a Record” green button, to review your outcome in the script.

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3.9 Edit an outcome

1. Log into the Demo System [CC-1-1 3.2]
2. From the module listing bar select Form Management 
3. Open the Form – Primary Management section and choose “Form – Edit”
4. Select the Form you wish to edit, e.g. the Form created in 3.2
5. In the console on the left hand side, in the “Phase 1 – Primary Setup” section, choose “Question Management”. The console options on the left hand side will change
6. In the console on the left hand side, in the “Section 3 - Outcomes” section, choose “Outcome Edit”.
7. Select “Not Interested”
8. Type in value “Not Interested at the Moment”
9. Type in description “Not Interested at the Moment”
10. Type in script “Thank you for taking my call today. If you need anything else our website is available.”
11. Click “Edit Outcome” from the bottom of the screen
12. In the console on the left side click the “Add a Record” green button, to review your outcome in the script.

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3.10 Grant security permissions

1. Log into the Demo System [CC-1-1 3.2]
2. From the module listing bar select Form Management
3. Open the Form – Primary Management section and choose “Form – Edit”
4. Select the Form you wish to edit, e.g. the Form created in 3.2
5. In the console on the left hand side, in the “Phase 2 – Rollout Preparation” section, choose “Grant Access”
6. Select the people you would like to be able to access your form.

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3.11 Ensure a form is visible to a user

There are a number of ways of verifying access has succeeded including

3.11.1 Simple user testing

Asking the user can they log in and see your form in their Inbound Contact form list.

This approach is also helpful in assisting the user to correctly navigate to the form, especially if they are unfamiliar with the system.

3.11.2 Profiling a form's access

1. Log into the Demo System [CC-1-1 3.2]
2. From the module listing bar select Form Management 
3. Open the Form – Primary Management section and choose "Form – Edit"
4. Select the Form you wish to edit, e.g. the Form created in 3.2
5. In the console on the left hand side, in the "Phase 2 – Rollout Preparation" section, choose "Profile Access"
6. Ensure the user you want to have access is in the list

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3.11.3 Profiling a user's access

1. Log into the Demo System [CC-1-1 3.2]
2. From the module listing bar select Form Management 
3. Open the Form – Primary Management section and choose “Form – Edit”
4. Select the Form you wish to edit, e.g. the Form created in 3.2
5. In the console on the left hand side, in the “Phase 2 – Rollout Preparation” section, choose “Security Management”. The console options on the left hand side will change
6. From the drop down list in the left hand side, choose the user you wish to check
7. Click “Profile”
8. When the report generates on the right hand side, ensure the desired form is listed.

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3.12 Set the work queue

Bxpfore this process will work, a numbxpr of new records will need to bxp added to the form. The more records and diverse outcomes used the more interesting the stacks will appear.

You can use process [CC-1-2 3.5] to assist in adding a number of records.

With the records in place:

1. Log into the Demo System [CC-1-1 3.2]
2. From the module listing bar select Outbound Contact 
3. Open the Queue Management section and choose “Set Current Working Outcome”
4. Choose the Form you created and added records to
5. From the numbers in the grid, either complete or incomplete, select one stack that a value greater than 0 in it.
6. On the following screen, click “Click here to view the current queue”
7. This will list all the queues scheduled to be contact. When the “Currently in stack” reduces to 0, it will then automatically remove from the list. The list processes in the “Sequence Number” order.

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3.13 Complete inbound to outbound processing

This process is going to add 1 record through Inbound and then process the same record through outbound using an existing form.

Please note this process will delete all records in an existing form. Please only use this tutorial on a form that does not contain important CDA records.

You must have a form already built. You can use 3.2 to guide you through this process.

Stage 1: Reset the form for Demoing.

1. Log into the Demo System [CC-1-1 3.2]
2. From the module listing bar select Form Management 
3. Open the Form – Primary Management section and choose "Form – Edit"
4. Select the Form you wish to edit, e.g. the Form created in 3.2
5. In the console on the left hand side, in the "Phase 2 – Rollout Preparation" section, choose "Rest for Live Use". This will delete all CDAs and CCLs from this form.
6. Click "Delete Form Data" in the window on the right hand side.

Stage 2: Log an Inbound Contact record.

7. From the module listing bar select Inbound Contact 
8. From the "My Data" section, choose "Take an inbound contact"
9. Select the Form we are demonstrating on, e.g. the Form created in 3.2
10. Add a record [CC-1-2 3.2]

Stage 3: Set the working outcome

11. From the module listing bar select Outbound Contact 
12. Open the Queue Management section and choose "Set Current Working Outcome"
13. Choose the Form you created and added records to
14. From the numbers in the grid, choose the only stack with 1 in it

Stage 4: Make an outbound contact

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15. From the module listing bar select Outbound Contact
16. From the My Data section, choose “Make an outbound contact”
17. Select the Form we are demonstrating on
18. You should be presented with the record that you logged via Inbound.

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4 Processes & Procedures

At this level there are no associated relevant processes or procedures for the user to note.

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5 Appendices – Trainer Notes

5.1 Set up steps

5.1.1 User configuration

Users best set up using template file CC-1-3 Sample Content – User Setup File.xls”

Replace Permissions and Settings from “CC-1-3 Template User” for each user

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5.2 User Profile

User profile will be as follows:

5.2.1 Functional Access:

Form Management
- Form - Primary Management
- Form - Question Management
- Form - Field Mapping
- Form - Outcome Manager
- Form - Form and Data Deletion

Inbound Contact
- My Data

Outbound Contact
- My Data
- Queue Management

System Access Management
- Security Reports
- Security - Content Access

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5.2.2 Content Access:

None

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