

REPORTING

ADD NEW TEMPLATE

The *Email Designer* tool gives users the ability to create email templates and provides a designer for customising existing emails within *BPO2*. Users also have the opportunity to test these email templates using *BPO2*'s existing email service.

USER REQUIREMENTS

- A basic working knowledge of word processing software e.g.
 Microsoft Word.
- ° An **email address**, used for sending out emails.
- An understanding of where the **email flags** occur in BPO.

VERSION COMPATIBILITY

- BPO2 v2.4.0.1 or later.
- BPOConfigurator v2.2.0.0 or later.
- Ensure that users have run the latest upgrade script necessary, to use the new email designer module.

Ribbon Access: Configurator > Reporting > Email Designer





ADD A NEW TEMPLATE

• The *Add* button allows users to create a template for an <u>existing</u> company email flag.

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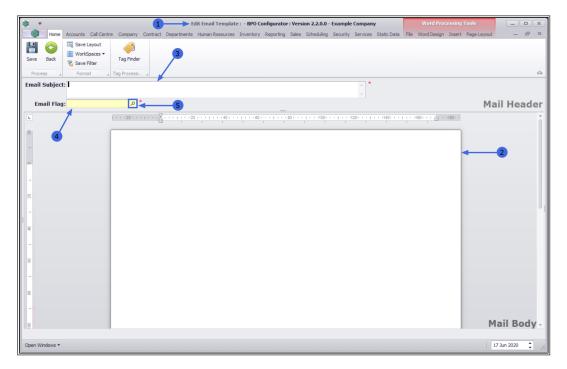
1. The *Edit Email Template* screen will open with a <u>blank</u> template loaded.

Here, the user can:

- 2. Set the *layout*,
- 3. Type in the *Email Subject* line
- 4. Link an *Email Flag* to the template

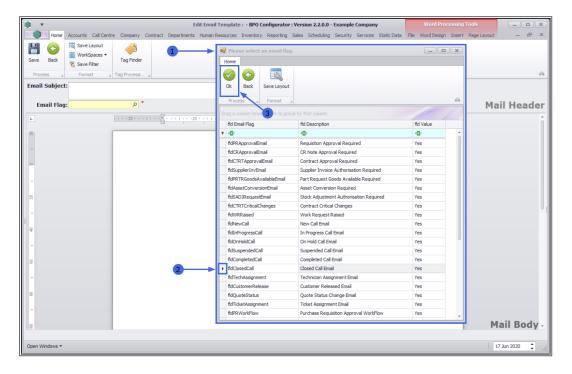
It is important to note that the *Email Flag* should be selected before editing the document. Any edits made <u>before</u> the flag is selected will be overridden.

5. Click on the *Search* button in the *Email Flag* field.





- 1. The *Please select an email flag* screen will pop up.
- 2. Select the particular flag that you wish to create a template for.
- 3. Select **Ok**.
 - Note: Only flags already set up in the system database will be displayed here. The system does <u>not</u> allow the user to create new email flags from the designer.



• Once the email flag is selected, the template and associated data is extracted from the database.



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DELETING INFORMATION

- Select the text you wish to delete and use *Delete* or *Backspace* on the keyboard.
- In this example *Serial No* and *Location* will be deleted.

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 If *tags* were part of the deleted information, the tags deleted from the template body will now have a different colour in the *Grid View*.



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GRID VIEW

The *Grid View* shows all the fields that can be used by the email template. In this *Grid View*;

- 1. *Field tags* are red, *condition tags* are blue and *loop tags* are gold by default.
- 2. A tag that has been <u>removed</u> and where there are no other occurrences of this particular tag on the template, the row colour for this tag is updated to default grey.
- 3. The row colour of a <u>selected</u> row (where the row selector is) is green.



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ADDING INFORMATION

- You can type in information you wish to add in the template body.
- In this example, text *Serial No:* has been typed in.

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- If you wish to add a tag to the email template, drag the tag you wish to add from the *Grid View* and drop it on the template.
- In this example, tag @SerialNo has been dragged from the Grid
 View and dropped on the template.



- Note 1: If the tag was not in use, the row colour will change from grey to red.
- Note 2: A tag can be used <u>multiple</u> times on a template.

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TAG FINDER

- The tag finder is used to quickly identify where tags are located on the template.
- Click on Tag Finder.

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• The *Tag Finder Control* will be displayed.

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- Double click on the tag you would like to find.
- In this example, @SiteName has been selected.

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- The selected tag will now be highlighted in the template.
 - Note: The tag finder is <u>not</u> able to highlight tags within the email subject line.



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You can use the following Tag Finder Controls;

- 1. Find Prev: Finds the previous occurrence of a tag.
- 2. **Find Next:** Finds the next occurrence of a tag.
- 3. Close Finder: Closes the tag finder.

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WORD PROCESSING TOOLS

You can use the Word Processing Tools ribbon to edit the template. This ribbon contains the usual document editing tools such as picture inserts, table



creation and word formatting.

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Thank you for calling ??@CompanyName?? , your call is resolved. Technician:??@Technician??		fidClosedCall	@StartTime	Start time of the call.
Client Name: ??@CustomerCode?? ??@CustomerName??		fidClosedCall	@SerialNo	Serial number of the item.
Call SLA Status: ??@Priority?? Call Start Time: ??@StartTime??		fidClosedCall	\$Serial_Critical\$	Serial No of item related to the o
Call End Time: ??@EndTime??		fidClosedCall	@SiteName	Name of the site.
Contact Person: ??@Contact?? Region: ??@SiteName??		fldClosedCall	\$Item_Critical\$	Name of the item related to the
Call Description??@Description??		fidClosedCall	@CompanyName	Name of the company.
Serial No : ??@SerialNo??		fidClosedCall	@FuncLocDescri	Functional location
Location: ?@Fund.coDescription??		fidClosedCall	@CustomerName	Full name of the customer.
Actions Taken: ??@ActionTaken??		fidClosedCall	@Contact	Full name of the contact person.
Time Taken: ? reproduction aken??		fidClosedCall	@EndTime	End time of the call.
		fidClosedCall	@Description	Description of the call.
	Mail Body -			

In this example, the *Word Design* tab has been selected and the options associated with it are now displayed in the ribbon.

• •	Edit Email Template : fldClosedCall -	- BPO Configurator : Version 2.3.0.	.0 - Example Com	npany	Word Pro	ocessing Tools	>
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Thank you for calling 72@Company Technican:??@Technican:??Gliet Name: 72@Company Cliet Name: 72@CustomerCode?? Cliet Name: 72@CustomerCode?? Cliet Statistics Statistics Call End Time: 72@EndTime?? Call End Time: 72@EndTime?? Call End Time: 72@EndTime?? Call End Time: 72@EndTime?? Serial No :??@SerialNor? Serial No :??@SerialNor? Custom: 72@EndTime?? Custom: 72@EndTime?? Custom: 72@EndTime?? Custom: 72@EndTime?? Custom: 72@EndTime?? Time Taken: ??@TetalHours??	Name?? , your call is resolved.			1ail Body -	 Indicated and Advanced and Adva	Calleference Calleference CalcionTaken CalcionTaken Catalhours Calcion	Upgery of the call. Ungas dentifier for the contoner. Ungas dentifier for the call. Ungas adhynumetic dentifier for. Ungas adhynumetic dentifier for. Teal hours spert working on the Sarat time of the call. Serail No Often entitled to the call. Name of the team-clated to the call. Name of the team-clated to the call. Name of the cambrady. Functional location An one of the cautomer. Ful name of the cautomer. Ful name of the cautomer. Hal name of the call.
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In this example, the font colour for text - *Time Taken* has been changed to *red*.



• •		Edit Email Templat	e : fldClosedC	all - BPO Conf	figurator : Versie	n 2.3.0.0 - Examp	le Compan	v						
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-									6	dClosedCall	@CustomerCode	Unique id	entifier for the	customer.
8									6	dClosedCall	@CalReference	Unique id	entifier for the	call.
									6	dClosedCall	@Technician	Unique al	phanumeric ider	tifier for
-									6	ldClosedCall	@ActionTaken	Unique al	ohanumeric ider	tifier for
0									f	ldClosedCall	@TotalHours	Total hou	rs spent workin	g on the
Th	hank you for calling ??@CompanyNa echnician:??@Technician??	ame??, your call	is resolved.						1	idClosedCall	@StartTime	Start time	of the call.	
- Cli	lient Name: ??@CustomerCode?? ??@	CustomerName?	?						1	dClosedCall	@SerialNo	Serial nur	ber of the item	6
	all SLA Status: ??@Priority?? all Start Time: ??@StartTime??								f	ldClosedCall	\$Serial_Critical\$	Serial No	of item related	to the call.
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	ontact Person: ??@Contact?? egion: ??@SiteName??								1	ldClosedCall	\$Item_Critical\$	Name of t	he item related	to the c
	all Description: ??@Description??								f	idClosedCall	@CompanyName	Name of	he company.	
	and all a second and all and an								6	idClosedCall	@FundLocDescri	Functiona	location	
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	ctions Taken: ??@ActionTaken?? ime Taken: ??@TotalHours??								6	ldClosedCall	@EndTime	End time	of the call.	
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SAVE EMAIL TEMPLATE

• When you are done, click on *Save*.

Edit Email Template : fldClosedCall - BPO Configurator : Version 2.3.0.0 - Example Company	Word Pr	ocessing Tools	
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ail Subject: Cal Reference : ??@CalReference??. Resolved.			
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	 fldClosedCall 	@Priority	Urgency of the call.
	fidClosedCall	@CustomerCode	Unique identifier for the customer
	fidClosedCall	@CalReference	Unique identifier for the call.
	fidClosedCall	@Technician	Unique alphanumeric identifier for
	fidClosedCall	@ActionTaken	Unique alphanumeric identifier fo
	fidClosedCall	@TotalHours	Total hours spent working on the
Thank you for calling ??@CompanyName??, your call is resolved. Technician:??@Technician??	fidClosedCall	@StartTime	Start time of the call.
Client Name: ??@CustomerCode?? ??@CustomerName??	fidClosedCall	@SerialNo	Serial number of the item.
Call SLA Status: ??@Priority?? Call Stat Time: ??@StartTime??	fidClosedCall	\$Serial_Critical\$	Serial No of item related to the c
Call End Time: 70@StatCimer? Call End Time: 70@StatCimer?	fidClosedCall	@SiteName	Name of the site.
Contact Person: ??@Contact??	fidClosedCall	\$Item_Critical\$	Name of the item related to the
Region: ??@SiteName?? Call Description: ??@Description??	fidClosedCall	@CompanyName	Name of the company.
	fidClosedCall	@Fund.ocDescri	Functional location
Serial No: 7?@SerialNo?? Location: ??@Fund.coDescription??	fidClosedCall	@CustomerName	Full name of the customer.
	fidClosedCall	@Contact	Full name of the contact person.
Actions Taken: ??@ActionTaken?? Time Taken: ??OtaHours?	fidClosedCall	@EndTime	End time of the call.
The faces, signation of the second se	fidClosedCall	@Description	Description of the call.
Mail Body	•		
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- A *Process Validation* message will pop up telling you;
 - Saved Successfully.
- Click on *Ok*.



Edit Email Template : fldClosedCall - BPO Configurator : Version 2.3.0.0 - Example Company	Word Pro	ocessing Tools	
🕘 Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data	File Word Design	Insert Page	Layout _ 🖻
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nall Subject: Cal Reference : ??@CalReference??. Resolved.			
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1 · · · 20 · · · · · · · · · · · · · · ·	fldClosedCall	@Priority	Urgency of the call.
	fidClosedCall	@CustomerCode	Unique identifier for the customer
	fidClosedCall	@CalReference	Unique identifier for the call.
	fidClosedCall	@Technician	Unique alphanumeric identifier for
	fidClosedCall	@ActionTaken	Unique alphanumeric identifier fo
	fidClosedCall	@TotalHours	Total hours spent working on the
Thank you for calling _?@CompanyName?? , your call is resolved. Technician:??@Technician??	fidClosedCall	@StartTime	Start time of the call.
Client Name: ??@CustomerCode?? ??@CustomerName??	fidClosedCall	@SerialNo	Serial number of the item.
Call SLA Status: ??@Priority?? Call Start Time: ??@StartTime??	fidClosedCall	\$Serial_Critical\$	Serial No of item related to the c
Call End Time: ??@EndTime??	fidClosedCall	@SiteName	Name of the site.
Contact Person: ??@Contact?? Process Validation X Region: ??@SiteName??	fldClosedCall	\$Item_Critical\$	Name of the item related to the
Call Description: ??@Description??	fidClosedCall		Name of the company.
Serial No : ??@SerialNo?? Save successful.	fidClosedCall	-	Functional location
Location ?? UPFunct.coEscription??	fidClosedCall		Full name of the customer.
Actions Taken: ??@ActionTaken??	fidClosedCall	@Contact	Full name of the contact person.
Time Taken: ? TOP total Hours?? OK	fidClosedCall	@EndTime	End time of the call.
	fidClosedCall	@Description	Description of the call.
Mail Body -			
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• Click on *Back* to return to the *Email Template Listing for Company: []* screen.

♥ Edit Email Template : fidClosedCall - BPO Configurator : Version 2.3.0.0 - Examp	le Company				_	
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		1	fidClosedCall	@CustomerCode	Unique identifier	
			fidClosedCall	@CalReference	Unique identifier	
			fidClosedCall	@Technician	Unique alphanum	
			fidClosedCall	@ActionTaken	Unique alphanum	
			fidClosedCall	@TotalHours	Total hours spent	
Thank you for calling ??@CompanyName?? , your call is resolved. Technician:??@Technician??			fidClosedCall	@StartTime	Start time of the	
Client Name: ??@CustomerCode?? ??@CustomerName??			fidClosedCall	@SerialNo	Serial number of	
Call SLA Status: ??@Priority?? Call Start Time: ??@StartTime??			fidClosedCall	\$Serial_Critical\$	Serial No of item	
Call End Time: ??@EndTime??			fidClosedCall	@SiteName	Name of the site.	
Contact Person: ??@Contact?? Region: ??@SiteName??			fldClosedCall	\$Item_Critical\$	Name of the item	
Call Description??			fidClosedCall	@CompanyName	Name of the com	
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Location: ?@Fund.coDescription??			fidClosedCall	@CustomerName	Full name of the	
Actions Taken: ??@ActionTaken??			fidClosedCall	@Contact	Full name of the	
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