

We are currently updating our site; thank you for your patience.

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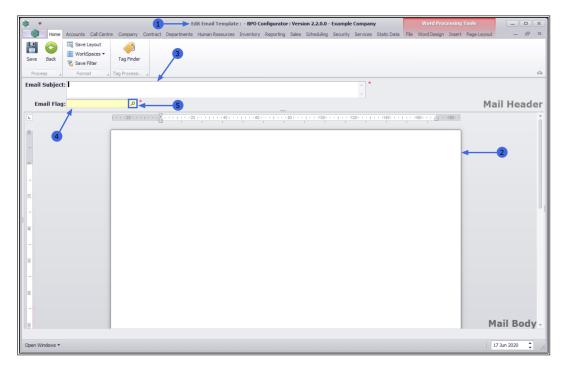
1. The Edit Email Template screen will open with a <u>blank</u> template loaded.

Here, the user can:

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

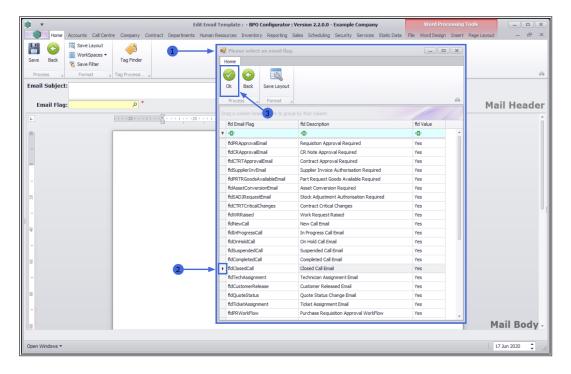
It is important to note that the **Email Flag** should be selected before editing the document. Any edits made <u>before</u> the flag is selected will be overridden.

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.

Edit Email Template : fldClosedCall - BPO Configurator : Version 2.3.0.0 - Example	e Company			
Imme Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security	Services Static Data	File Word Design	Insert Pag	e Layout 🛛 — 🗗
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		fidClosedCall	@CalReference	Unique identifier for the call.
		fidClosedCall	@Technician	Unique alphanumeric identifier for
		fidClosedCall	@ActionTaken	Unique alphanumeric identifier for
		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 ca
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Contact Person: ??@Contact?? Region: ??@SiteName??		fldClosedCall	\$Item_Critical\$	Name of the item related to the o
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Actions Taken: ??@ActionTaken??		fidClosedCall	@Contact	Full name of the contact person.
ACCORTS Facent: rrgatedontacentre Time Taken: ? 2007ctalHours??		fidClosedCall	@EndTime	End time of the call.
		fidClosedCall	@Description	Description of the call.
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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 : fidClosedCall - BPO Configurator : Version 2.3.0.0 - Example Company					Word Processing Tools				
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In this example, the font colour for text - **Time Taken** has been changed to **red**.



Edit Email Template : fldClosedCall - BPO Configurator : Version 2.3.0.0 - Example Company			X	
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Thank you for calling ??@CompanyName??, your call is resolved. Technician:??@Technician??		fidClosedCall	@StartTime :	Start time of the call.
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		fidClosedCall	@Description	Description of the call.
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en Windows *				01 Dec 2020 🛟

## 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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	fidClosedCall	@CalReference	Unique identifier for the call.
	fidClosedCall	@Technician	Unique alphanumeric identifier for
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	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.
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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.
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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 Co	ompany	Word Pr	ocessing Tools	
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■ · · · · · · · · · · · · · · · · · · ·	A	fldClosedCall	@Priority	Urgency of the call.
		fidClosedCall	@CustomerCode	Unique identifier for the customer.
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Thank you for calling ??@CompanyName?? , your call is resolved. Technician:??@Technician??		fidClosedCall	@StartTime	Start time of the call.
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• Click on **Back** to return to the **Email Template Listing for Com**pany: [] screen.

♥ Edit Email Template : fidClosedCall - BPO Configurator : Version 2.3.0.0 - Examp	le Company				_	
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