-----Original Message-----
From: Ranjan D
Sent: Wednesday, April 17, 2013 1:04 PM
To: Debbie Collins; Pat Leonhart; Jamie Horrell
Subject: Document for "queues"

Below is revised list of topics. Please follow the plan. I do NOT need to see the design. I have given some ideas. You all know the product. Think and STAY WITHIN THE PLAN. Do NOT do more. Its important that each topic only has information about THAT topic. You can go ahead, complete the design. That should take 2-3 hours. I suggest Debbie and Delight work on this, briefly updating Pat. STICK to time goals. 2 people does not mean EACH PERSON takes the full project time!

This is about a 6 - 8 hour job! Any problems, talk to Jamie. My instructions should be clear since you have agreed with my idea. So there should be NO issues. Do it quickly ;)

Ranjan

-----Original Message-----

From: Ranjan D

Sent: Wed 4/17/2013 10:48 AM

To: Debbie Collins; Pat Leonhart

Subject: RE: Areas for building queues

Here is my suggestion.

ONE knowledge base topic.. QUEUE BUILDING, WHICH MAY BE THE MOST IMPOrTANT AREA OF YOUR COLLECTION SYSTEM

It will have keywords for KBASE, AudioA, B C TRAINING ... everything, so it show us everywhere

We have a short overview on the Kayako page and then link to a pfd

pdf has

a list of items user can click on and link to an audio or video.

List is

1. What you need to understand before you learn about queues (medium audio)

Things to know - owner worker and split. debtors and accounts, Primary (designed to have best information), Primary is presented, phone numbers can be on accounts or other phones screens, concept of QCat, we only want accounts that should be worked (e.g. we omit accounts with a performing P/A, we must not call people multiple times on the same day etc. etc. Basically quickly touch on the terminology and ideas that we use so they understand what you layer say.

2. How queues are initially created in nightly processing (short audio, medium audio))

Explain what queues are... there is ONE queue we build and it is by... User. Not worker, though worker plays a key role. 2 worker codes can be worked by same person. How we process all open accounts, create ONE record in the queue file for one worker.... you CAN have 2 accounts for same debtor etc. QCats - what they are, show screen and how they can sort. System generated QCats etc. How phone numbers are handled... how they can get updated from a link.... what accounts are omitted. Processing types.. do NOT mention A, M P as being used now. Say it was designed for people without dialers. Now we can present accounts at different times using other methods. Suggest they do NOT use time frames. This is all about creating the queues. You should mention... this can take a while on LARGE databases. We have options that will spit the job into multiple parts so the job could finish in 1 hour instead of 3 1/2 hours.

3. Changing queues so they are exactly the way you want them (medium audio)

Concepts... we have 1,000,000 accounts... we want to strip it down to exactly what we want... What are we looking at? I explained this at a meeting.. all the accounts start out in one BIG area.... and we want to have separate rooms where we put accounts into.. so we can have campaigns, cells, work numbers, special clients etc.. separated... How do we do that? We will explain in the next section.

4. Queue consolidations (medium audio, medium video)

You can handle this.

5. Your queues are built and ready to work in the morning. What about exceptions and making changes during the day? (Medium audio)

Explain business issues. You want to push on one client. You have new business you want to work NOW. Think of things to say that are practical with good business examples.

6. Processes that can add accounts to queues during the day. (short audio, medium video)

Explain, all those processes, transfers, consolidations, audits, account posting and smart codes.... that can add to queues. Clearly explain how adding happens... if account was ALREADY worked.... we do nothing etc,

7. The relationship between queues and campaigns in I-Tel (short audio)

8. How about taking accounts out of the queues based on activity during the day? (medium audio)

Talk business. Debtor calls in and disputes account. You dont want it called etc. How do you do that? They call in - we dont want another call! etc.

9. How queues can be resorted - Uses I-Tel features (medium video)

Queue sorting, resorting etc, Show and explain the queue resorting in I-Tel

10. Auditing queues and checking the accounts in a queue (short audio, medium video)

Audit options - accounts worked, to be worked, queue audit (like account audit) do NOT talk about account audit here....

11. Reports the analyze queues (short video)

What do we have? Show then some of the menu options.

12. FAQ's and trouble shooting (Article)

Give answers to common problems and what they do? Why is my account not in my queues? Why is this account coming up twice to different people? This should be in work phones, why is it in hot accounts? etc. etc.

We have about 15 separate items to build. Each will be 3 - 10 minutes. So everything will be less than an hour. Leave 2 - 3 hours for design and planning of all the items. We could do the recordings in 2.5 hours! Maximum 3.

Is it clearer? Do you have any major disagreement?

Ranjan

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-----Original Message-----

From: Debbie Collins

Sent: Wed 4/17/2013 10:30 AM

To: Ranjan D; Pat Leonhart

Subject: Areas for building queues

Nightly processing

Display accounts for audit

Display accounts for audit (Queues)

Smart codes

Consolidate accounts for a single user

Multiple user consolidation rules (Nightly processing)

Account processing - Special transfers

Multiple user consolidation rules by client (Nightly processing) Contact series

For answers to your support questions please visit us at:

<http://www.quantrax.com> <<http://www.quantrax.com/>> and just click on the knowledgebase icon

If you need further assistance please contact us at:

support@quantrax.com <mailto:support@quantrax.com>

Together we can create the ultimate support system!

Thanks!

D

Debbie Collins

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