ECS: Cloud Dialer

USER GUIDE

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1.1 Campaign Overview

The Outbound Dialer (Campaign Index) is designed to increase productivity and enhance customer experience. The variety of dialers that Evolve IP offers helps improve agent's efficiency and conversion rates. Managers are able to easily manage multiple outbound calling campaigns and enjoy a more satisfied customer base.

The Campaign Index allows Supervisor to upload customers dialing lists, which are automatically dialed and routed to the most suitable and available agent while taking into consideration both the agent's profile, business rules and system's configuration.

A Campaign must be assigned to a Business Process with the proper routing to handle Campaign activities (No Answer, Voicemail Detection, Busy, etc). Each Campaign Business Process must be built and activated within the Evolve Contact Setup portal.

Note* *It is the customer's responsibility to setup the call flow, add and upload the contacts to the campaign, and assign the logic and business rules around an active campaign.*

1.2 Campaigns Index

The Campaign Index allows you to set up and manage Progressive, Predictive and Power dialers.

The campaign index displays campaign dialing record information, allowing supervisors to review the records before the Campaign is activated, stopped, pending or active.

To access the Campaigns work area and drill-down on an existing campaign, or create a new campaign, perform the following:

1. Click the Campaigns index button. You will see a list all the existing campaigns appear in the Work Area.

2. Click a Campaign name (hyperlink) VIP Customer to drill down on the relevant Campaign.

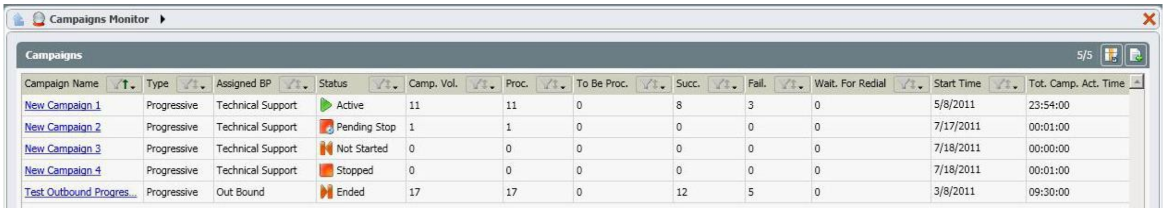
OR

3. Right-click the relevant Campaign hyperlink and select 'Zoom In' from the pop-up menu.

OR

4. Mouse-over Campaigns Monitor. The arrow changes to Campaigns Monitor.

5. Click Campaigns Monitor, a list of all the available Campaigns appear in a pop-up menu for you to choose from.


Campaigns Monitor

Campaigns 5/5

Campaign Name	Type	Assigned BP	Status	Camp. Vol.	Proc.	To Be Proc.	Succ.	Fail.	Wait. For Redial	Start Time	Tot. Camp. Act. Time
New Campaign 1	Progressive	Technical Support	Active	11	11	0	8	3	0	5/8/2011	23:54:00
New Campaign 2	Progressive	Technical Support	Pending Stop	1	1	0	0	0	0	7/17/2011	00:01:00
New Campaign 3	Progressive	Technical Support	Not Started	0	0	0	0	0	0	7/18/2011	00:00:00
New Campaign 4	Progressive	Technical Support	Stopped	0	0	0	0	0	0	7/18/2011	00:01:00
Test Outbound Progres...	Progressive	Out Bound	Ended	17	17	0	12	5	0	3/8/2011	09:30:00

Figure 1: Campaign Index in Work Area

The following tabs are available when drilling-down on a Campaign to get more specific performance and interaction details:

- Definitions
- Scheduling
- Performance
- Current Interactions
- Export/Purge
- Staff

The table below lists all the fields found in the main Campaign Index interface.

Table 1: Campaign Index Fields

Field	Description
Campaign Name	The campaign name.
Type	The campaign type (Power, Predictive or Progressive)
Assigned Business Process	The BP to which the Campaign is assigned to.
Campaign Status	The campaign Status (active, stopped, not started, ended, pending stop). 'Not Started' - campaign was created and saved in the system but current time, is earlier than campaign's start time. 'Ended' campaign was created and saved in the system but current time, is later than campaign's end time. 'Pending Stop' – If a campaign was stopped and there are currently interactions being handled by the agent, the campaign receives a 'pending stop' state until the interactons end.
Campaign Volume	The accumulated number of interaction records that were uploaded for the campaign.
% Abandoned in Shift	The percentage of "Campaign" interactions that ended in an abandoned stats (the customer hung up

Field	Description
	while waiting for an agent) from the “Campaign” interactions processed in the current shift
% Long Term Abandoned	The percentage of “Campaign” interactions that ended in an abandoned status (the customer hung up while waiting for an agent) from the “Campaign” interactions processed since the beginning of the campaign
Total Processed	The total number of interactions (records) that were placed in the queue and have been dialed.
To Be Processed	The total number of interactions (records) that are waiting to be processed. This includes interactions that are waiting to be redialed and new interaction records that have not yet been dialed.
Total Reached	The total number of 'Campaign interactions'' that ended with a ‘Customer Reached’ reason since the campaign first started.
Total Failed	The total number of Campaign interactions that ended in a failed status since the campaign first started.
Waiting for Redial	Total number of “Campaign interactions” that were re-scheduled and currently waiting to be redialed
Abandoned In Shift	The number of Campaign interactions that ended in an abandoned status (the customer hung up while waiting for an agent) from the Campaign interactions processed in the current shift
Long Term Abandoned	The number of Campaign interactions that ended in an abandoned status (the customer hung up while waiting for an agent) from the Campaign interactions processed since the beginning of the campaign.
Start Time	The time in which the campaign was first started.
Total Campaign Active Time	The accumulated time since the 'Campaign' was first started (in hours+ minutes).
Processed In Shift	Total number of 'Campaign interactions' that were processed during the current shift, regardless of the outcome (Success, failed, Redial)
% Reached in Shift	The percentage of Campaign interactions that ended in a ‘customer reached’ status from the Campaign interactions processed in the current shift.

Field	Description
% Failed In Shift	The percentage of 'Campaign' interactions that ended in a failed status from the 'Campaign' interactions' processed in the current shift .
Total Failed - Maximum Attempts Reached	The total number of 'Campaign interactions' that ended in a failed status after reaching the maximum dialing attempts, since the 'Campaign' first started.
Total Failed – Incorrect Number	The total number of 'Campaign interactions' that ended with a failed status due to a wrong number, since the campaign first started.
Purged	The total number of 'Campaign Interactions' that ended due to a purge, since the campaign first started.
Average Interaction Time	The average 'Campaign Interaction' time in an IVR and Predictive 'Campaign', is the average time that elapsed from the time the interaction was delivered to the BP until it was disconnected. For all other 'Campaign' types, it is the elapsed time since the agents accepted the interaction.
DNC Req.	Total DNC numbers requested in the shift
DNC Purged	Total number of interactions purged due to DNC Requests

1.2.1 Campaigns Index - Definitions Tab

This tab provides Supervisors with general campaign parameters and settings.

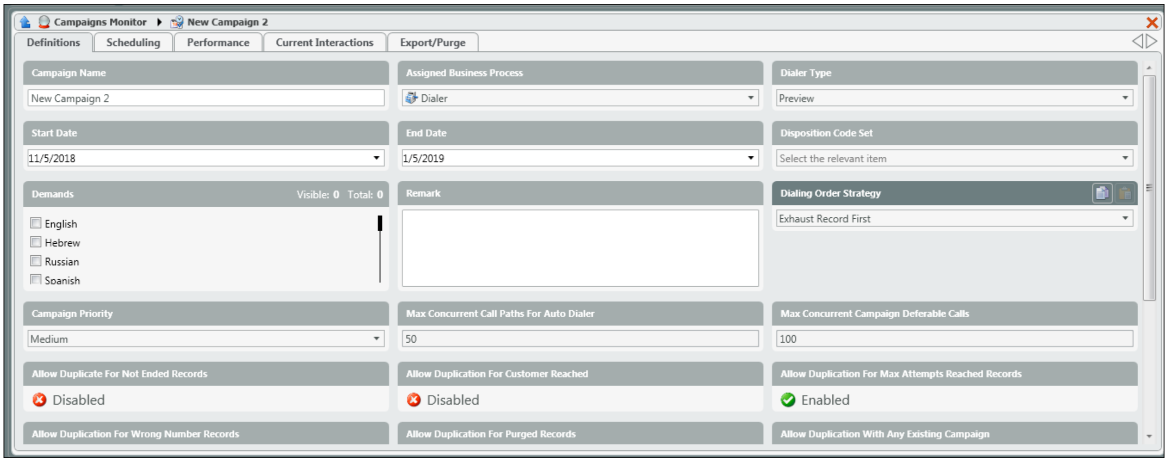


Figure 2: Campaign – Definitions Tab

The table below lists all the fields found in the Definitions Tab.

Table 2: Campaign – Definitions Tab

Field	Description
Campaign Name	The Campaign Name
Assigned Business Process	The BP to which the Campaign is assigned to.
Dialer Type	The Campaign Type Select either one of the following campaign types from the client: Power – The Power campaign delivers customers pre-recorded messages that can be followed by other treatments, such as transfer to an IVR flow or agent Predictive – The Predictive dialer dials several dialing records automatically and simultaneously, while eliminating no answer, busy signals and answering machines and taking average call time and number of agents allocated to the business process into dialing considerations. Only calls which have been answered are placed for agents' handling Power– Power campaign dials several dialing records automatically and simultaneously. Preview - Agents are able to have a more personalized customer interaction because customer information is previewed by the agent before dialing out. Agents can prepare for each call before reaching the customer, creating a more personalized agent/customer interaction, helping to improve customer satisfaction.
Start Date	Define the date the campaign will start running. Select the date using the calendar that opens when clicking .
End Date	Define the date the campaign will end. You select the date using the calendar that opens when clicking .
Disposition Code Set	Select the relevant Disposition Code set name (each code set name consist of numerous values) from the list that appears (ths disposition codes are defined in the Setup or Manager Client) for the agent to select during a campaign call. Example: You have provided the specific campaign with the Disposition Code set name: 'Regular Campaign Sales codes' The values within the

Field	Description
	Disposition Code set name are: Interested, Not Interested, Sale, Will Come to the shop
Power Dialer – Call paths to available agent state	If Answering Machine Detection is enabled, the Power dialer will filter out Answering Machines, Voice Mails, and Fax Machines. Power dialer modes: Limit to Campaign concurrent call paths – is used to limit the concurrent call paths to a fixed number regardless of the number of available agents. Call paths to Available agent state – is used to limit the concurrent call paths to the number of available agents (Ready or Busy status) multiplied by the Call paths to agent Ratio Call paths to Ready agent State – used to limit the concurrent call paths to the number of Ready agents multiplied by the call paths to agent ratio.
Power dialer: Call paths to agent ratio	Used by the power dialer if call paths to active agents state is enabled. The number of concurrent call paths is the number of active agents multiplied by the selected ratio.
Power dialer: Campaign concurrent call paths	Determines the number of concurrent call paths used by the power dialer regardless of the number of active agents. If set to 0, the number of conurrent call paths will be limited to Business Process maximum call paths (Max Concurrent Call Paths for Auto dialer)
Predictive Dialer: Predictive Dialer Speed	Used in the Predictive campaigns only. This parameter is used for increasing or decreasing agents workload in terms of the amount of calls per agent.
Predictive Dialer: Set Max Abandoned Call Percentage	Used in Predictive campaigns only. This parameter is used for selecting if abandoned threshold will be enforced: Disabled/Enabled
Predictive Dialer: Max Abandoned Call Percentage	Used in Predictive campaigns only. This parameter is used for setting the abandoned threshold. If 0% is selected, then the predictive dialer will dial only if there is a ready and available agent to take the next call.
CRM Display Template	Select the set of definitions on how to display contacts and interaction.

Field	Description
Demands	Choose the required campaign demands from the list. A demand can be a certain language or any other requirement.
Remark	Enter any comments/remarks that relate to the campaign here. These remarks are displayed in the Agent Client interaction panel.
Dialing Order Strategy	Dialing Order Strategy Select one of the following Order Strategy from the client: 1. Exhaust List First (FIFO) - will prioritize new records over redial attempts – first in first out 2. Exhaust List First (LIFO) - will prioritize new records over redial attempts – last in first out 3. Exhaust Records First (FIFO) – will prioritize redial attempts (subject to redial interval) over new records – first in first out 4. Exhaust Records First (LIFO) – will prioritize redial attempts (subject to redial interval) over new records – last in first out
Power/Predictive Dialer: Answering Machine Detection	Answering Maching Detection can be set to Enabled, Disabled or Organization Default. The Organization Default is set in the Setup Client. This will enable the system to detect an answering machine pick and if incorporated in the Business Process, leave a voicemail.
Campaign Priority	Prioritize the campaign, dictating the priority of campaign calls sent to an agent.
Max Concurrent Call Paths for Auto Dialer	Read-Only Field. Maximum nummber of campaign auto dialer interactions in the business process level (for Power and Predictive campaigns)
Max Concurrent Campaign Deferrable Calls	Read-Only Field. Maximum number of deferrable interactions in the business process level (for Progressive campaigns).
Allow Duplicate for Not Ended Records	Define whether duplicated records (compared to not ended record) are allowed or not: Disabled/Enabled
Allow Duplication for Customer Reached	Define whether duplicated records (compared to customer reached record) are allowed or not: Disabled/Enabled
Allow Duplication for Max Attempts Reached Records	Define whether duplicated records (compared to failed due to max attempts reached record) are allowed or not: Disabled/Enabled

Field	Description
Allow Duplication for Wrong Number Records	Define whether duplicated records (compared to failed due to wrong number record) are allowed or not: Disabled/Enabled
Allow Duplication for Purged Records	Define whether duplicated records (compared to purged record) are allowed or not: Disabled/Enabled
Allow Duplication with any Exisitng Campaign	Define whether duplicated records (compared to records in any state, at any existing campaign) are allowed or not: Disabled/Enabled
Allocated Outgoing Number	The allocated DID for the campaign calls.
Customer Full Name Link	
Product Link	
Location Link	
Customer Management Link	
Creation Time	Automatically created when you create the campaign

1.2.2 Campaigns Index - Scheduling Tab

This tab provides Supervisors with Scheduling parameters and additional campaign management settings.

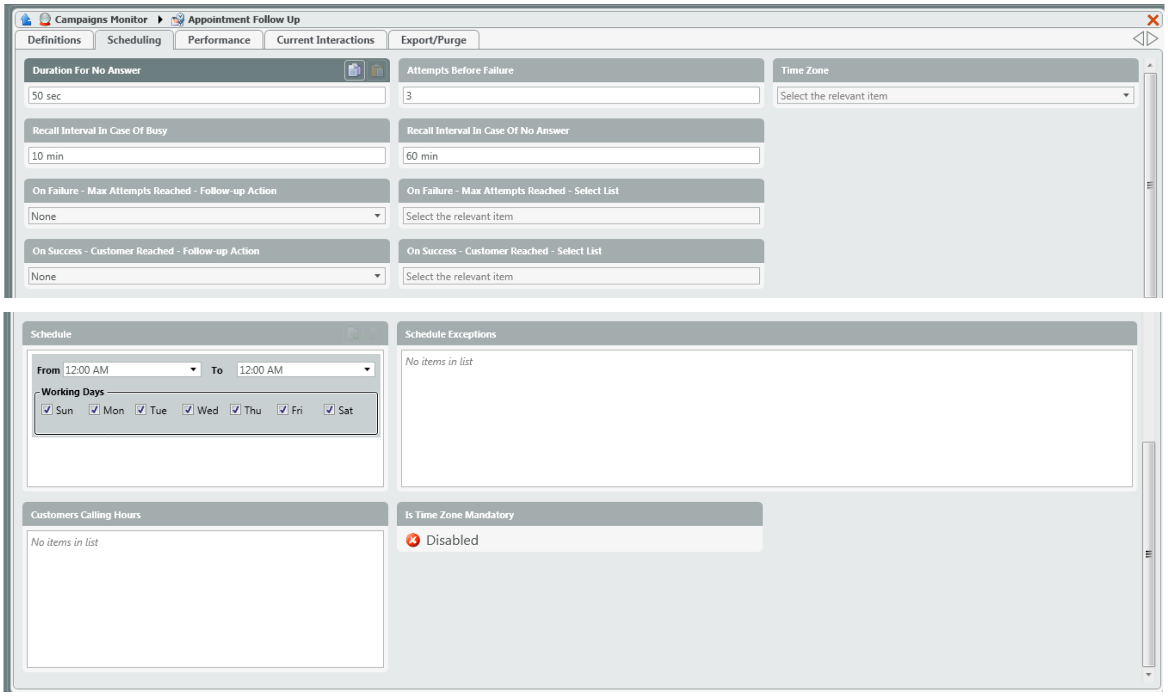


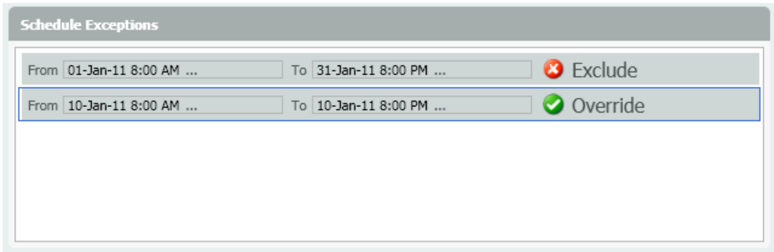
Figure 3: Campaign – Scheduling Tab

The table below lists all the fields found in the Scheduling Tab.

Table 3: Campaign – Scheduling Tab Field Definitions

Field	Description
Duration For No Answer	Define the time duration to wait (in seconds) until a customer answers. If the customer does not answer within the time you have specified the call will be disconnected with a no answer reason.
Attempts Before Failure	Define the number of attempts to call a customer until the system marks the campaign record as 'fail'.
Recall Interval In Case of Busy	Define the time (in minutes) for the system to wait before it calls the customer again in case the customer's line was busy.
Recall Interval In Case of No Answer	Define the time (in minutes) for the system to wait before it calls the customer again in case the customer did not answer.
On Failure – Max Attempts Reached – Follow Up Action	Trigger a follow-up action when a record failed on reaching the max attempts limit. The max attempts limit is defined in the "Attempts Before Failure" option noted above. In order to utilize this feature, an existing campaign must exist to send the failed record to.

Field	Description
	Options for follow up: 1. Add Contact to List - Upload the failed record to an existing list for future use or when performing List dialing 2. Add Interaction to Campaign - Upload the failed record to an existing campaign. Uploading the contact to the new campaign will zero out the dial attempts for that contact.
On Failure – Max Attempts Reached – Select List or Select Campaign	1. On Failure – Max Attempts Reached – Select List: Select the list to add the On Failure - Max Attempts Reached contact to. 2. On Failure – Max Attempts Reached – Select Campaign: Select the campaign to add the On Failure - Max Attempts Reached contact to.
On Success – Max Attempts Reached – Follow Up Action	Trigger a follow-up action when a record ends in Success Customer. In order to utilize this feature, an existing campaign must exist to send the success record to. Options for follow up: 1. Add Contact to List - Upload the success record to an existing list for future use or when performing List dialing 2. Add Interaction to Campaign - Upload the success record to an existing campaign. Uploading the contact to the new campaign will zero out the dial attempts for that contact.
On Success – Max Attempts Reached – Select List or Select Campaign	1. On Success– Customer Reached – Select List: Select the list to add the On Success - Customer Reached contact to. 2. On Failure – Customer Reached – Select Campaign: Select the campaign to add the On Success - Customer Reached contact to.
Time Zone	The time zone for this specific campaign.
Time to Sample Ending Interactions in Predictive Dialer	Used in Predictive Campaigns only. Enter how often (in seconds) the system will recalculate the predictive formula, according to the given parameters at the time.

Field	Description
Schedule	Define when campaigns will take place by specifying the days of the week and the hours the campaign should operate. These hours are based upon the Time Zone of the campaign and if none is specified, the Time Zone of the Business Process, followed by the Time Zone of the Organization. Click to create a new Schedule panel. Click to delete a Schedule panel.
Schedule Exceptions	Define exceptions to the daily schedules. Use the schedule exceptions panel to define when campaigns are NOT to take place, and when campaigns ARE to take place despite what was entered in the regular schedule panel. Exclude: Even if the regular schedule has been defined with a specific date and time, the campaign will not be activated. Override: Even if the regular schedule does not have the specified date and time, the campaign will still run.  Click to create a new Schedule Exception. Click to delete a Schedule Exception.
Customers Calling Hours	Define when the Campaign should contact records based upon the Time Zone specified in each record or calculated during the record import (if that feature was activated). • When customer is not defined for an interaction - customer calling hours configuration is ignored • Configuring 'From' and 'To' with the same value means 24 hours • Unchecked days means calls will not be made in these days

	• When defining multiple timeslices - the behavior is a logical join of all timeslices. Meaning an interaction will be dialed if the customer time is within **any** of the configured timeslices
Is Time Zone Mandatory	Enabling this setting will enforce the Customers Calling Hours. Any records without a Time Zone will be ignored.

The Scheduling Tab consists of a number of time duration parameters, which describe what happens when callbacks and campaigns are performed using the Agent Console. Before agents complete an interaction (i.e. during an interaction, or after an interaction ended), one of their tasks is to click the 'Completed Status' drop-down option and select a call status. This enables them to give a short explanation as to why an interaction ended. The table below lists the different call statuses an agent can select from the Agent Console's Completed Status Panel (left column) and specifies which time duration parameter is used for each (right column).

Completed Status Selected	Time Duration Parameter Used
Handled	This is the default value of the Agent Console's Completed Status. Selecting this option means that the campaign interaction was handled by the agent. If this option is selected by the agent the campaign statistics acknowledges this interaction as handled successfully.
Callback Requested	If an agent selected the 'Callback Requested' (i.e. redial the customer) option in the Agent Console's Completed Status panel, the system will perform the campaing interaction accordingly.
Busy Tone	If an agent selected the 'Busy Tone' option in the Agent Console's Completed Status panel, the system will use the time duration entered in the 'Recall Interval In Case of Busy' parameter to redial the customer.
No Answer	If an agent selected the 'No Answer' option in the Agent Console's Completed Status panel, the system will use the time duration entered in the 'Recall Interval In case of No Answer' parameter.
Fax Tone	If an agent selected the 'Fax Tone' option in the Agent Console's Completed Status panel, the system will use the time duration entered in the 'Recall Interval In case of No Answer' parameter.

Completed Status Selected	Time Duration Parameter Used
Answering Machine	If an agent selected the 'Answering Machine' option in the Agent Console's Completed Status panel, the system will use the time duration entered in the 'Recall Interval In case of No Answer' parameter.
Wrong Destination	If an agent selected the 'Wrong Destination' option in the Agent Console's Completed Status panel, the system will record it as a 'failed attempt, and no more attempts to call will be made.
Unknown Error	If an agent selected the 'Unknown Error' option in the Agent Console's Completed Status panel, the system will use the time duration entered in the 'Recall Interval In case of No Answer' parameter.

1.2.3 Campaigns Index - Performance Tab

This tab provides Supervisors with general performance parameters and settings.

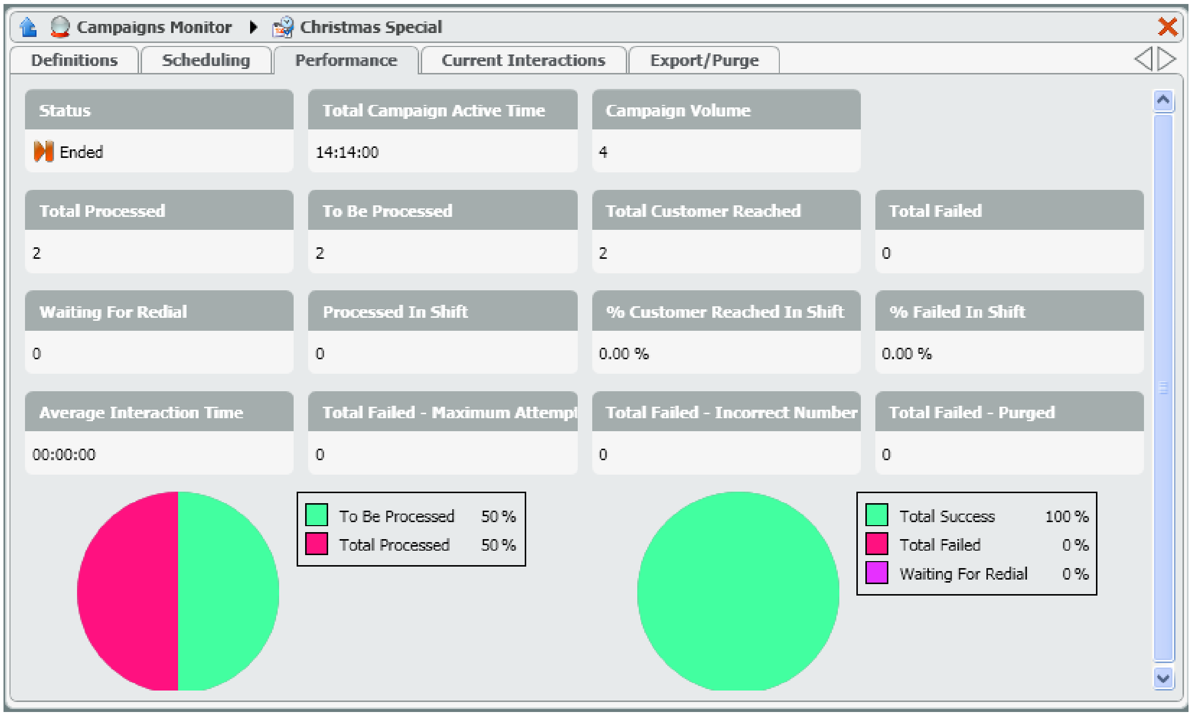


Figure 4: Campaign – Performance Tab

The table below lists all the fields found in the Performance Tab.

Table 4: Campaign – Performance Tab Field Definitions

Field	Description
Status	The campaign Status (active, stopped, not started, ended, pending stop). 'Not Started' - campaign was created and saved in the system but current time, is earlier than campaign's start time. 'Ended' campaign was created and saved in the system but current time, is later than campaign's end time. 'Pending Stop' – If a campaign was stopped and there are currently interactions being handled by the agent, the campaign receives a 'pending stop' state until the interactons end.
Total Campaign Active Time	The accumulated time since the 'Campaign' was first started (in hours+ minutes).
Campaign Volume	The accumulated number of uploaded interaction records for the 'Campaign'.
% Abandoned In Shift	The percentage of Campaign interactions that ended in an abandoned status (the customer hung up while waiting for an

Field	Description
	agent) from the Campaign interactions processed in the current shift
% Long Term Abandoned	The percentage of Campaign interactions that ended in an abandoned status (the customer hung up while waiting for an agent) from the Campaign interactions processed since the beginning of the campaign.
Total Processed	Total number of interactions (records) that were placed in the queue and handled.
To Be Processed	Total number of interactions (records) that are waiting to be processed. This includes interactions waiting for redial and new interactions records that have not yet been dialed.
Abandoned in Shift	The number of Campaign interactions that ended in an abandoned status (the customer hung up while waiting for an agent) from the Campaign interactions processed in the current shift.
Long Term Abandoned	The number of Campaign interactions that ended in an abandoned status (the customer hung up while waiting for an agent) from the Campaign interactions processed since the beginning of the campaign.
Total Customers Reached	Total number of 'Campaign interactions'' that were answered by the customer and ended successfully, since the campaign first started.
Total Failed	Total number of 'Campaign interactions'' that ended in failed status since the campaign first started.
Waiting For Redial	Total number of 'Campaign interactions' that were re-scheduled, and currently waiting to be redialed.
Processed In Shift	Total number of 'Campaign interactions' that were processed during the current shift, regardless of the outcome (Success, failed, Redial)
% Customer Reached In Shift	The percentage of 'Campaign' interactions that ended with a ‘customer reached’ status from the 'Campaign' interactions' processed in the current shift.
% Failed In Shift	The percentage of 'Campaign' interactions that ended in a failed status from the 'Campaign' interactions' processed in the current shift.
Average Interaction Time	The average 'Campaign interaction' time in IVR and predictive 'Campaigns', is the average time elapsed from the time the interaction was delivered to the BP until it was disconnected. For

Field	Description
	all other 'Campaign' types, it is the elapsed time since the agents accepted the interaction was disconnected.
Total Failed Max Attempts Reached	The total number of 'Campaign interactions' that ended in a failed status after reaching the maximum dialing attempts, since the 'Campaign' first started.
Total Failed Incorrect Number	The total number of 'Campaign interactions' ended with a failed status due to a wrong number, since the campaign first started.
Total Purged	The total number of campaign interactions that were marked as purged due to being canceled, since the campaign first started.
DNC Requests in Shift	Total DNC numbers requested in shift
DNC Purged	Total numbers of interactions purged due to DNC requests

1.2.4 Campaigns Index - Current Interactions Tab

You may use the Current Interactions tab to view all the Campaign interactions including interactions that are currently waiting in the queue/BP as well as the interactions agents are currently handling. This enables you to get a wider picture of how your Campaigns are functioning. See section **Error! Reference source not found.** for a list of the fields and their definitions, found in the Current Interactions tab.

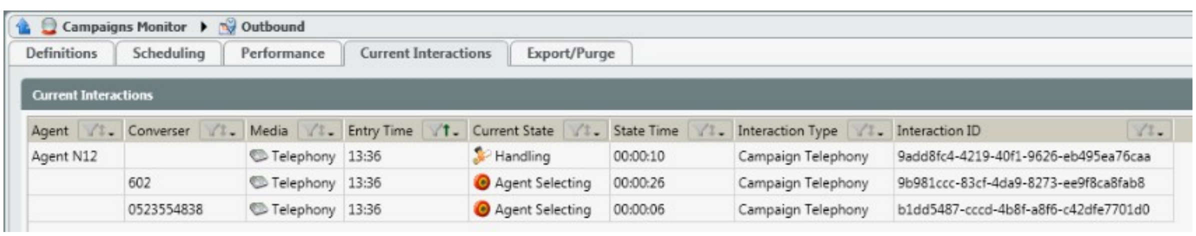


Figure 5: Campaign – Current Interactions Tab

The table below lists all the fields found in the Current Interactions Tab.

Table 5: Campaign Interactions - Current Interactions Tab Fields

Field	Description
Agent	The Agent currently handling the campaign interaction. If no agent appears it means that the interaction is in the BP, but the agent is not yet handling the interactions

Field	Description
Remote Party	The telephone number of the customer being called in the campaign. If the customer's name is known in the system, their name will also appear here.
Media	The media type e.g. Telephony.
Entry Time	The time in which the interaction entered the business process.
Current State	The current interaction state (e.g. handling, wrap up, agent selecting – meaning currently searching for a suitable agent, etc.)
State Time	Indicates how long the interaction has been in the current state.
Demands	Demands (skills) assigned to the Interaction
Demands Filter	Current Demand Filter assigned to the interaction - this is a dynamic value and will update depending on how long the interaction waited in queue
Waiting Time	Indicates how long the interaction has been waiting in queue.
Total Waiting Duration	Indicates the total time the interaction has been waiting in queue.
System DID	The telephone number the customer called (the system's end point).
Interaction Type	The interaction type (Campaign Telephony).
Assigned To	Agent/Team which the interaction is assigned to. If non exists – current business process is shown
Customer ID	Customer ID.
Interaction ID	An Id number that is automatically provided by the system.

1.2.5 Campaigns Index - Export/Purge Tab

The **Export** feature allows you to export campaign details that are currently in the system into an excel file and a .CSV file (zipped). Exporting a file will provide a detailed picture of the information found in the campaign

Example: A Supervisor needs to produce a report that shows you all the campaign interactions that were dialed in a certain area.

The Supervisor would enter the dialing code of the respective area, in the Destination field, and the report produced will indicate all the campaign interactions within the specific location.

The **Purge** feature allows you to delete all campaign interactions that have not ended. The system automatically adds 'Pending' in the Interaction Status field and 'Not Ended' in the Ending Status field by default.

	Note: Purged campaign interactions do not impact the campaign volume.

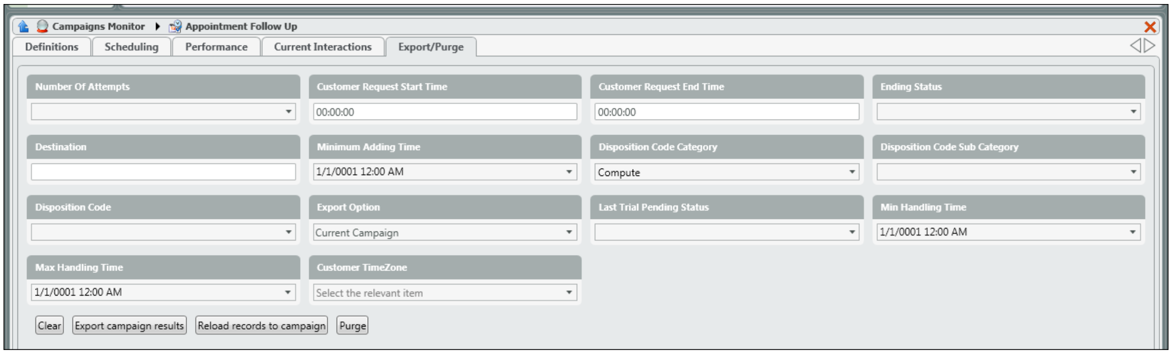


Figure 6: Campaign Index – Export/Purge Tab

The table below lists all the fields found in the Export/Purge Tab:

Table 6: Campaign Index – Export/Purge Tab fields

Field	Description
Number Of Attempts	In this search query, select the number of dialing attempts made by the system/agent.
Customer Request Start Time	Enter the time interval (From) in which a customer asked to be called back.
Customer Request End Time	Enter the time interval (To) in which a customer asked to be called back. For example – the customer requested the callback up until 7pm.
Ending Status	The outcome of the specific campaign. The values shown here can be: Customer Reached, Max Attempts Reached, Not Ended, Purged, Wrong Number
Destination	The customers phone number to be used in the campaign. The number entered here can be according the 'like' rule e.g. if you enter an asterisk (*), it stands for zero or more digits. If you enter a question mark (?), it stands for exactly one digit.
Minimum Adding Time	The callbacks that were added after the entered time.

Field	Description
Disposition Code Category	Select the relevant Disposition Code Category from the list that appears (ths disposition codes category is defined in the Setup Client) for the agent to select during a campaign call.
Disposition Code Sub Category	Select the relevant Disposition Code Sub Category from the list that appears (ths disposition code sub categories are defined in the Setup Client) for the agent to select during a campaign call.
Disposition Code	Select the relevant Disposition Code from the list that appears (ths disposition codes are defined in the Setup Client) for the agent to select during a campaign call. Note* you do not need to select all three disposition code options to run the report.
Export Option	Select the Campaign to be exported
Last Trial Pending Staus	The last pending status of an interaction ; i.e No Answer, Busy, etc
Min Handling Time	Filter results by the time the interaction was handled.
Custome TimeZone	Filter result by customer time zone.

u **To export campaign interactions:**

1. Click 

to open the campaign monitor view.

2. Click the campaign you want to drill down on.

3. Click the Export/Purge tab and enter/select the relevant details in the available fields.

4. Click 

. The save as dialog box opens.

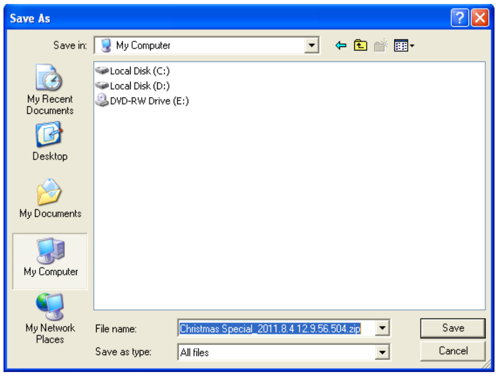


Figure 7: Campaign – Export – Save As Dialog

5. Select where you want to save the zip file.
6. Click 'Save'. A message appears saying you have created the file successfully.

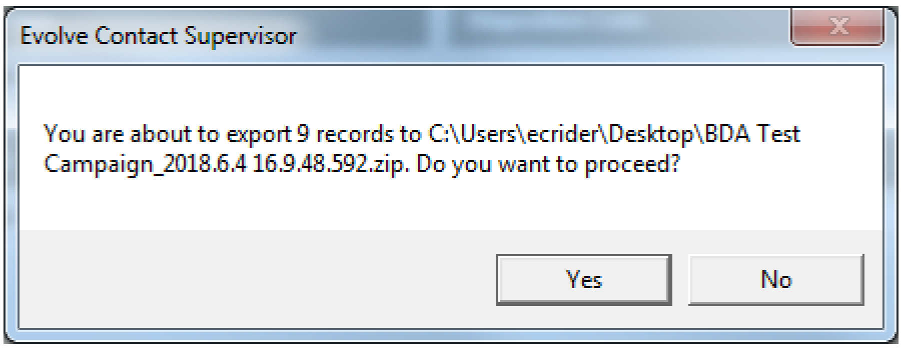


Figure 8: Campaign – Export – Created Successfully Message

7. Click 'OK'. The following two files are created and saved: ExportCampaignInteractions.csv and ExportCampaignInteractions.xlsx.

	**Note:** The exported file cannot be reloaded into the system.

u **To purge campaign interactions:**

1. Click Campaigns to open the campaign monitor view.
2. Click the relevant campaign in the list to drill down into the campaign.
3. Click the Export/Purge tab and enter/select the relevant details in the available fields.
4. Click Purge. A warning message appears.

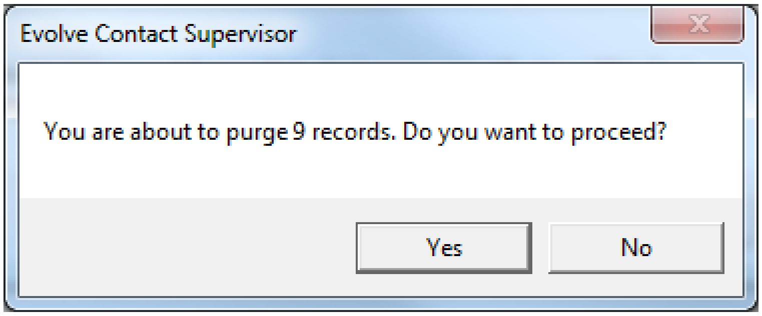


Figure 9: Campaign – Purge – Do you want to proceed Message

5. Click 'Yes' to continue or 'No' to cancel the purge.

1.2.6 Working with Campaigns

All Campaigns are linked to specific Business Processes within an Enterprise.

Campaigns are broken down into three (outbound) entities:

Preview Dialers – Preview dialing (automated outbound calls) is an automated dialing technique that presents contact information to the call center agent prior to dialing the phone number.

Predictive Dialers – Predictive dialers dial several numbers from a list automatically and simultaneously, while eliminating no answer, busy signals and answering machines. The Predictive Dialer takes average call time and number of agents allocated to the business process into its dialing considerations. Only calls that have been answered are placed for agents' handling.

Power Dialer – Interactive Voice Response dialers - automated dialing technique that allows customers to hear a pre-recorded message, and may or may not reach an agent, depending on what the customer pressed on their phone.

1.2.7 Creating a New Campaign

Campaigns are associated with business processes. A business process may include numerous campaigns that can run concurrently. Each campaign can only use one dialer type and a different campaign must be created for each type of dialer you wish to use.

u To create a new campaign:

1. Click.  to create a new Campaign. A new line appears in the Work Area labeled New Campaign.

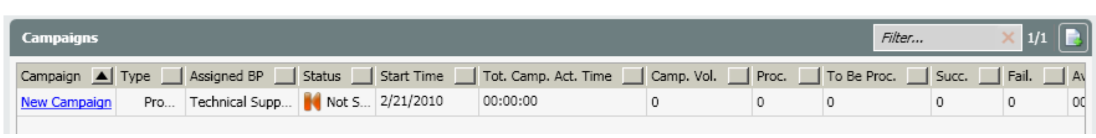


Figure 10: New Campaign

2. Click New Campaign to drill-down into the campaign setting window. The New Campaign Settings window opens. The following tabs will appear:

- Definitions
- Scheduling
- Performance
- Current Interactions
- Export/Purge

1.2.7.1 Definitions

Within the Definitions tab the following information is needed to activate a new campaign. The rest of the tabs can be adjusted at the discretion of the Supervisor if they are needed to run the campaign (see the Definitions Index Tab Definitions Table for more information on each option):

1. Campaign Name
2. Assigned Business Process
3. Dialer Type
4. State Date
5. End Date
6. Disposition Code Set

1.2.7.2 Scheduling

Within the Scheduling tab the *Schedule* section is needed to activate a new campaign. The rest of the tabs can be adjusted at the discretion of the Supervisor if they are needed to run the campaign (see the Schedules Index Tab Definitions Table for more information on each option).

1.2.7.3 Performance

The Performance tab provides insight into how the Campaign is performing.

1.2.7.4 Current Interactions

The Current Interactions tab shows calls that are currently being processed (Dialing, Handled by an Agent, etc)

1.2.7.5 Export/Purge

The Export/Purge tab allows for the supervisor to purge the campaign of current records that are not pending and export records based on specific interaction types or search parameters.

1.2.8 Creating a Campaign Dialing List (Targets)

Before a Campaign can be activated, a Dialing list must be created and imported into the campaign. A list should be created as either an Excel or CSV file.

Note: We recommend that you a create a Excel/CSV file with headers (First Name, Last Name, Phone Number, etc).

When adding phone numbers to the list it cannot contain any special characters. It should appear like the following: 6105558000

Campaign Time Zones:
When importing a contact list into a Campaign, the Source File should include each record's Time Zone and it should be mapped to the Contact Time Zone field during the import process. If the Dialer should ignore any records that don't include a Time Zone, enable the "Exclude Records with invalid/empty contact time zone" setting in Step 1 of the Import Contacts Wizard.

If Time Zone is not available in the contact import file, the Dialer can automatically determine each contact's Time Zone based upon other fields in the Source File. The Dialer will automatically determine each Contact's Time Zone based upon the following fields in this priority order:

1. Zip code
2. State and City (If Zip Code is not part of the imported file)
3. Area Code (If State, City and Zip code are not part of the imported file)
4. State only (If the phone number is not a 10 digits number and Area Code cannot be determined – this is the least accurate calculation due to number portability)
5. NULL – If steps 1-4 failed

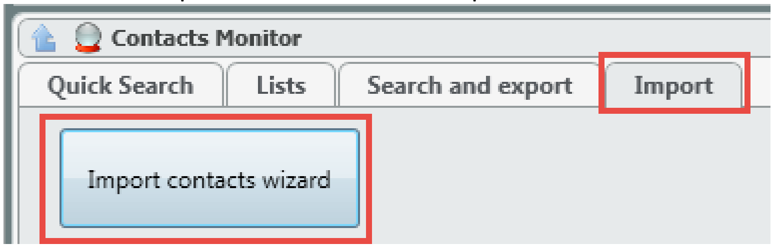
To activate this feature, enable the "Auto calculate time zone, if not exist in file" setting in Step 1 of the Import Contacts Wizard.

To ensure that customers are only called during the appropriate hours, create entries in the "Customers Calling Hours section" on the Campaign Scheduling tab and check the "Is Time Zone Mandatory" check box. For example, if you only want the dialer to place outbound calls between 9am and 6pm Monday through Friday, that time window should be specified. Otherwise, the system will place calls any time a campaign is active without any time restrictions.

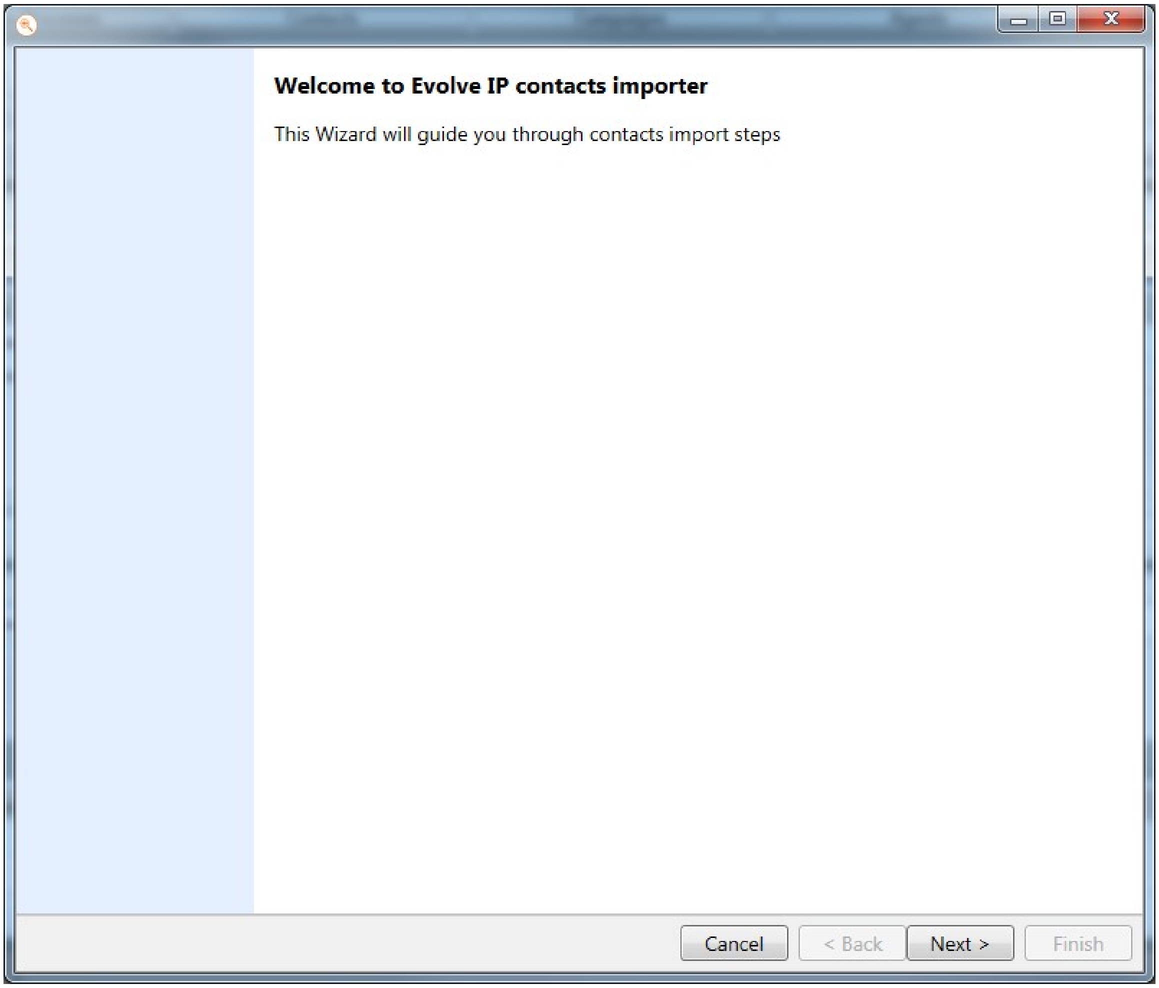
u **To create a list:**

1. Click on the Contacts Tab 

2. Click on the Import tab and then the Import Contacts Wizard



3. The following screen will open. Click Next.



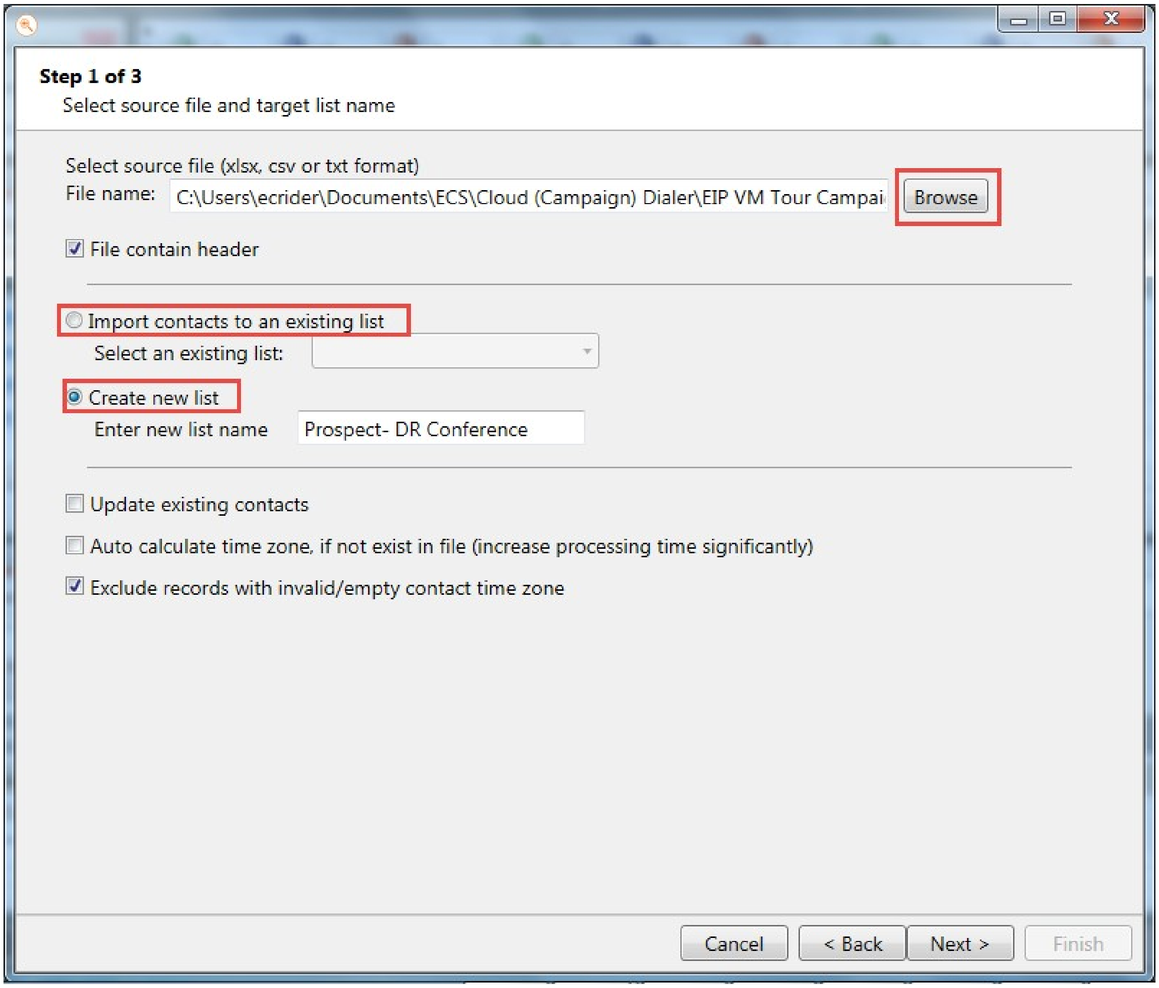
4. Select Browse to upload the Contact list.

    a. Once a file has been selected, choose to upload the list to an existing list (select list from the drop down) or create a new list (enter in the new list name).

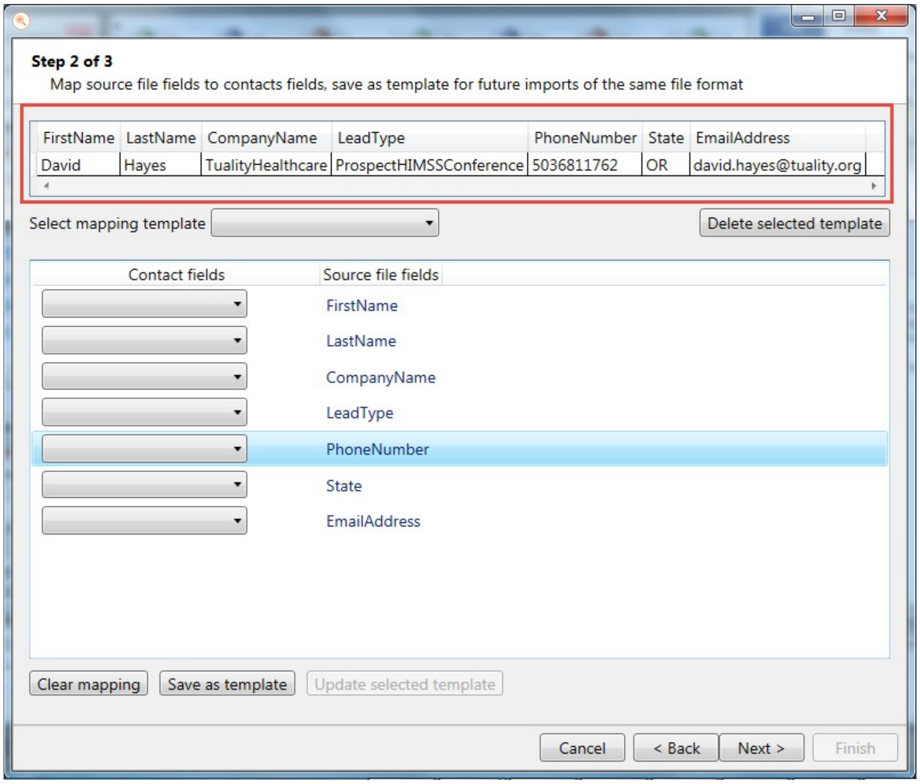
    b. Select Update Existing Contacts if updating an existing contacts information to an already existing list

    c. Select Auto Calculate Time Zone, if none exist in file (increases processing time)

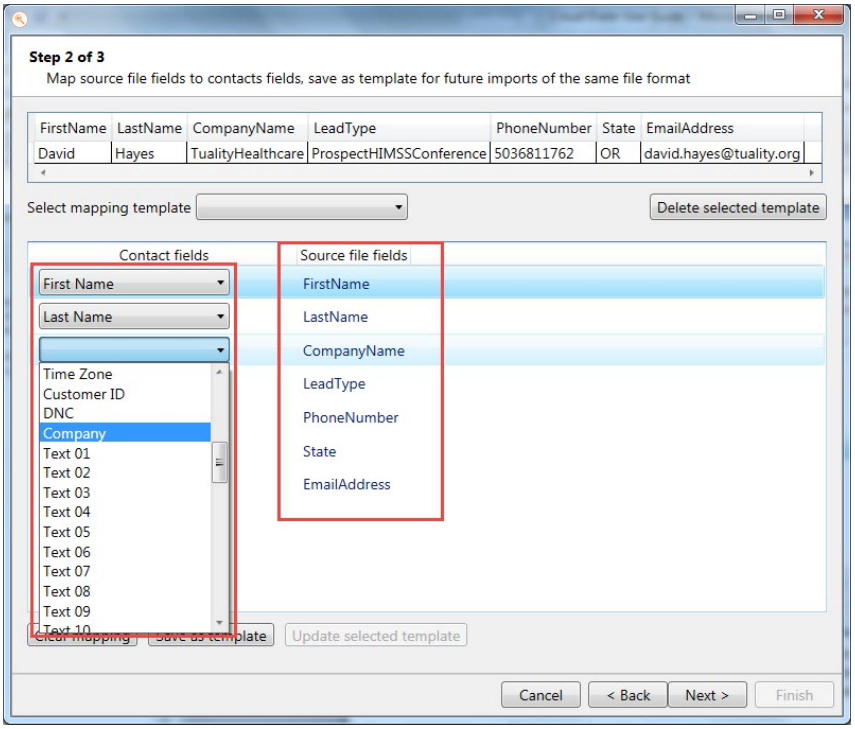
d. Select Exclude Records with invalid/empty contact time zone if applicable



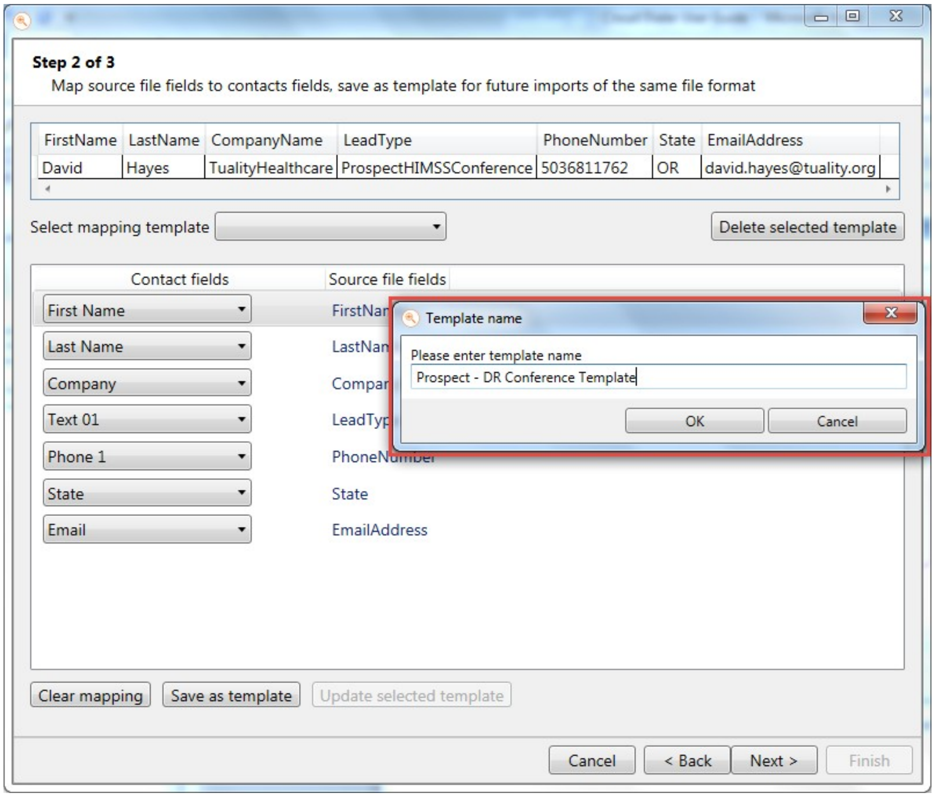
5. Select Next
6. On the next screen you will see an example of a contact with the heads that were populated within the spreadsheet that was uploaded.



7. To display this information to the agent when receiving a Campaign call, select the appropriate Contact Fields from the drop down that match the Source File Fields show on the right hand column

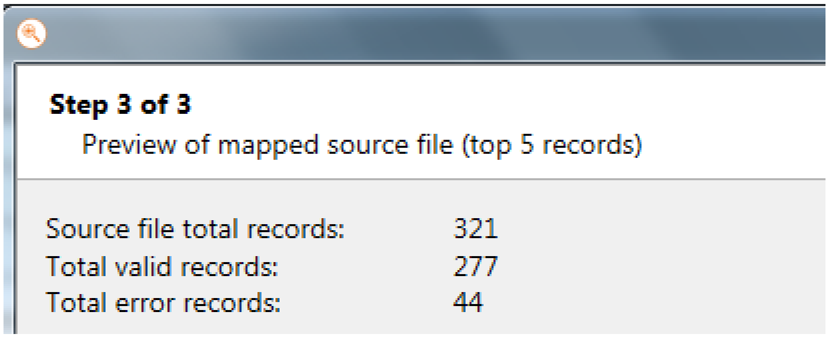


8. Select Save as Template if this is the first time creating a campaign using the Source File Fields. Enter in a template name and select ok. A confirmation that the template was saved successfully will appear.



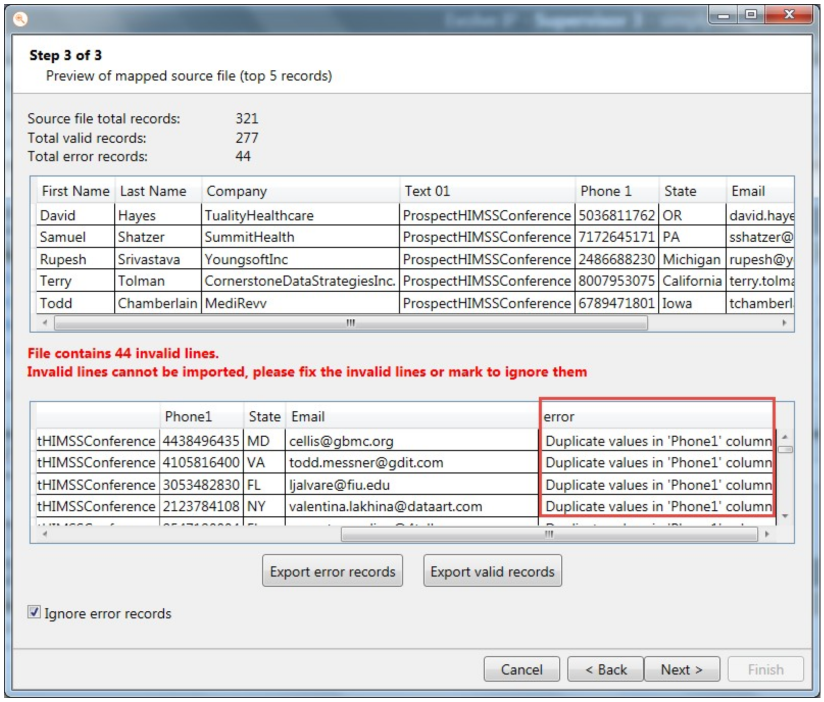
9. Click Next

10. The next screen will show the Source File Total Records (total contacts uploaded in the list), Total Valid Records and the Total Error Records.



11. The first list shows a sample of the valid records

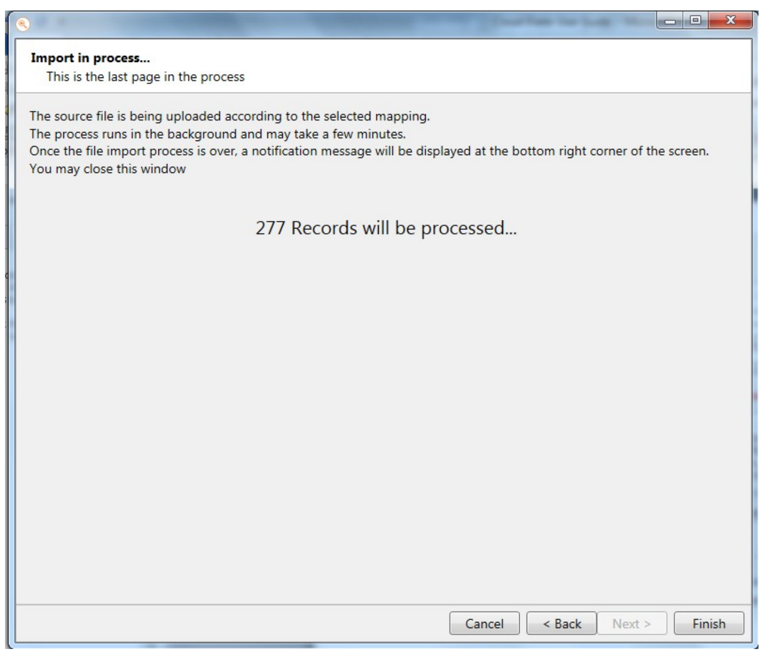
12. The second list shows the invalid records and why they are invalid. In this example there were duplicate phone numbers in the list uploaded.



13. To continue with the upload and ignore the errant records, select Ignore Error Records.

14. Click Next.

15. A upload success screen will appear. Select Finish and return to the Supervisor Client.



1.2.9 Importing Campaign Dialing List (Targets)

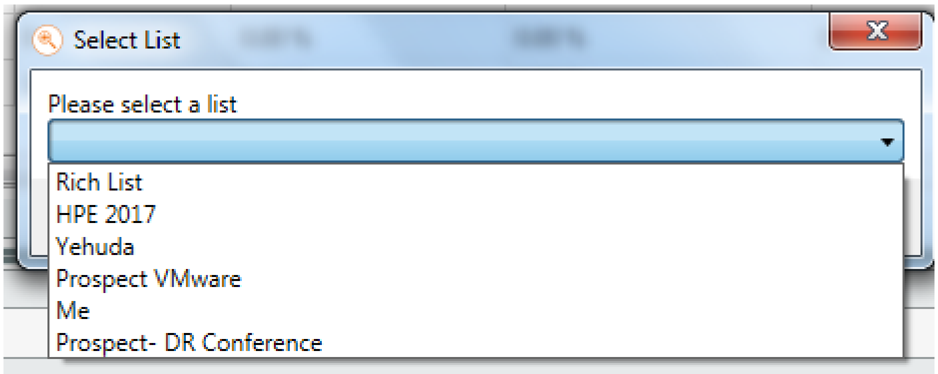
Once a list has been added and before a Campaign can be activated, a Dialing list must be imported into the campaign.

u **To import targets:**

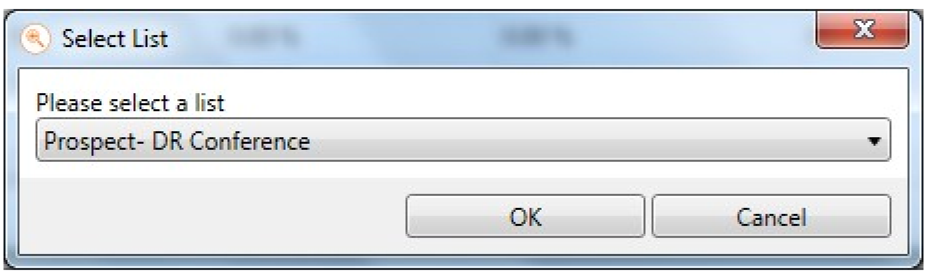
1. Right-click the relevant campaign and select 

.

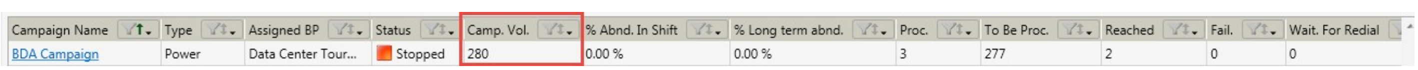
2. Select the Campaign list from the drop down.



3. Click Ok



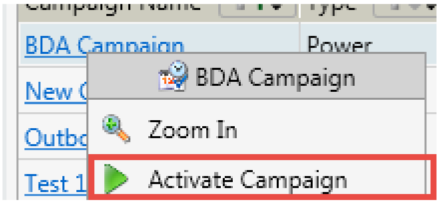
4. The newly added list will appear in the Campaign Volume to indicate how many records were added.



1.2.10 Activating a Campaign

u **To Activate a campaign:**

1. Right-click the relevant campaign. A shortcut menu opens.
2. Click **Activate Campaign**.



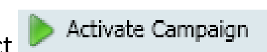
3. The system starts checking all the relevant campaign settings i.e. it checks to see that the dates and time frames are correct, if all is okay, it starts to take the interactions from the campaign lists out of the database in order to start calling.

1.2.11 Managing Existing Campaigns

The campaign index displays a list of existing campaigns (Power, Predictive and Progressive dialing records) to the supervisor, allowing them to review it before it automatically dials and reaches the customer.

Right-clicking a campaign provides you with features that will allow you to manage each of the existing campaigns.

Activating a Campaign:

Right-click the relevant campaign and select 

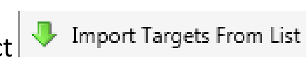
.

Stopping a Campaign:

Right-click the relevant campaign and select 

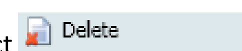
.

Importing Targets:

Right-click the relevant campaign and select 

.

Deleting a Campaign:

Right-click the relevant campaign and select 

.

Note: Delete can be performed only on campaigns that are not active (i.e. fully stopped).

For Example: If an agent is currently handling campaign interactions, and the campaign is stopped, those campaign interactions that were sent will still be performed. When a campaign is stopped the system will stop streaming new campaign interactions.

The campaign interaction is not considered to be completely stopped until all the campaign related interactions have been handled entirely e.g. Power campaigns that are in the process of playing announcements to the customer or predictive/progressive campaigns which the agent is currently handling are examples of campaigns that continue to be handled until the agent hangs up/interaction ends.

Zooming in on Campaigns:

Right-click the relevant campaign and select Zoom In.

View Load History:

Right-click the relevant campaign and select View Load History.

Use this feature to produce an online report that displays the number of 'loads' (one load may consist of many campaign records) that were populated.

8/4/2011 1:06:45 PM

Campaign Records Load History

Christmas Special

Loading Time	Total Records	Loaded Records	Duplicate Records	Erroneous Records	Errors File
6/1/2011 3:58 PM	2	2	0	0	N/A

Figure 11: Campaign Records Load History Report

The table below indicates the fields found in the Load History report:

Table 7: Load History Report Fields

Field	Description
Loading Time	The time and date the specific file was loaded.
Total Records	The total amount of records that were loaded
Loaded Records	The number of records loaded successfully.
Duplicate Records	If there were duplicate records that were loaded, then the amount duplicated is shown here.

Field	Description
Erroneous Records	If there were records with errors, the number of records that had errors will be shown here.
Error File	If there were records with errors, this field will contain a link to a file with the erroneous records.

Disposition Code Report:

Right-click the relevant campaign and select Disposition Code Report.

This feature is used to extract an online report that shows you all the completed campaign interactions that have disposition codes. The name of the disposition code and the number of ended campaign interactions that had the disposition code is displayed. If the campaign interaction had no disposition code, then 'No Code' is displayed.

Accumulated Disposition Code Report

Campaign Name: promotion tickets

Disposition Code Category	Disposition Code Sub Category	Disposition Code	Amount
Tickets for concerts	Tickets for live Show	Lady GaGa	2
Tickets for concerts	Tickets for live Show	Madonna	1
Tickets for concerts	Tickets for live Show	Maroon 5	2
Tickets for concerts	Tickets for Opera	Beethoven	1
Tickets for concerts	Tickets for Opera	Mozart	1
Tickets to Movies	Planet Theater	IronMan	2
Tickets to Movies	Planet Theater	Xman	1
Tickets to Movies	VIP Theater	Xman	2

Figure 12: Accumulated Disposition Code Report

Export File for Editing:

Right-click the relevant campaign and select Export File for Editing.

This feature is available only when the campaign's status is 'Stopped'. The exported excel file is used for editing purposes and shows you all the campaign interactions that have not yet ended. The following can be edited in the exported file:

- The file's order – this will influence the way in which campaigns are dialed
- The customer name list
- The customer telephone list
- The Time Zone

After you have made the relevant changes to the exported file, use the 'Import Edited file' feature.

Note: Only those fields that appear in white may be edited in the excel file. The gray fields are not editable.

Import Edited File:

Right-click the relevant campaign and select 

.

This feature is available only when the campaign's status is 'Stopped'. The file is imported back into the campaign after you have made changes to it.

Note: When importing an edited file, only the last exported file is imported.

Reset Abandoned Rate:

Right-click on the relevant campaign and select 

This will reset the Abandoned Rate back to 0% for the Campaign.

Saving your Campaigns:

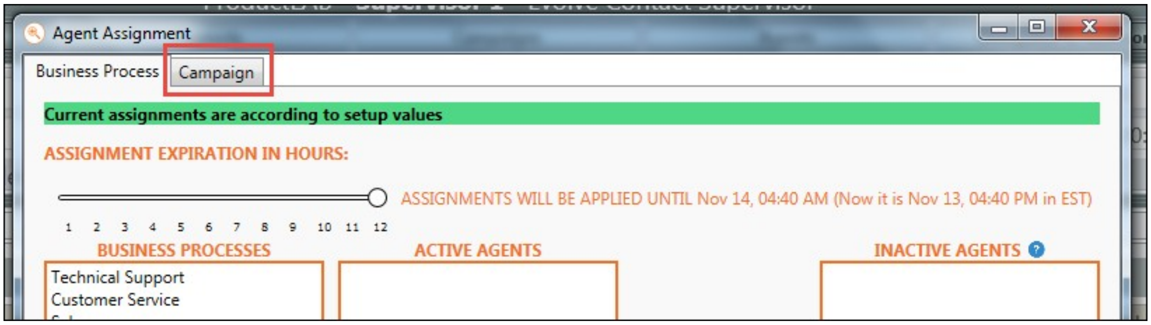
Click  to save campaign changes/additions made. The save is done globally i.e. if you made changes or additions to a number of campaigns, all changes will be saved.

1.2.12 Staffing a Campaign

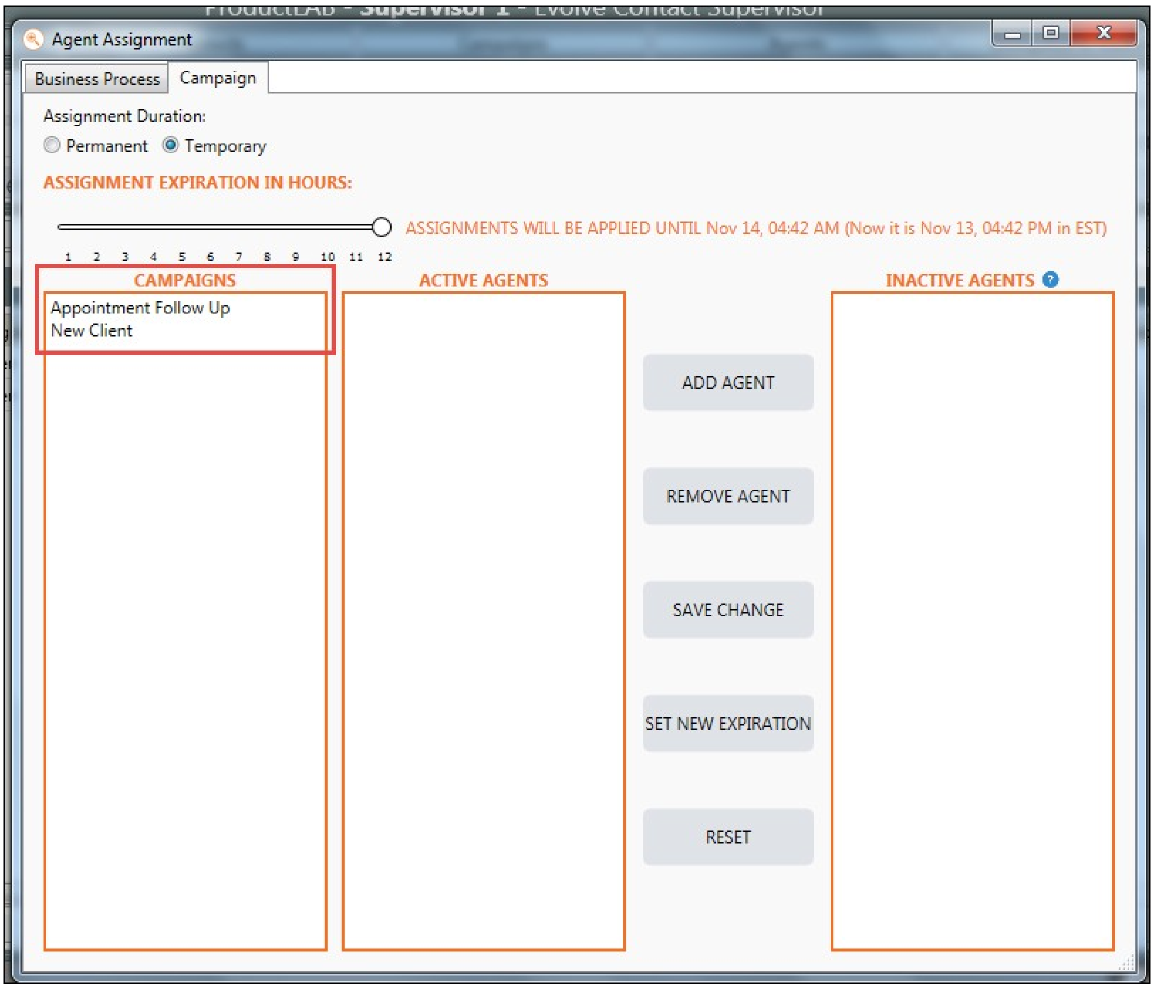
The Assign Agent to Business Process and Campaigns Icon allows Supervisor to manage the agents assigned to receive calls from each Campaign. The list of agents available is pulled from the Business Process the Campaign is assigned.

1. Select the Assign Agents Icon at the bottom of the Supervisor Client

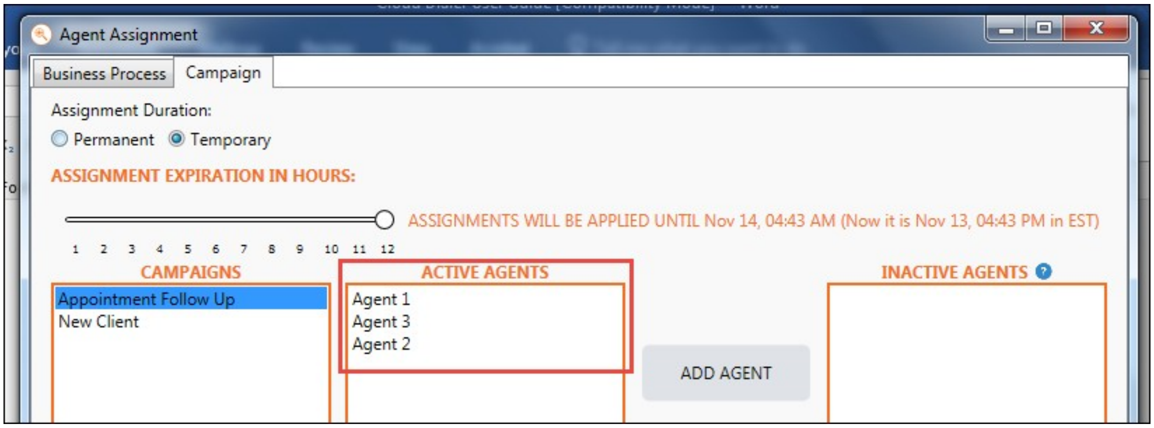
2. Select the Campaign Tab



3. This will provide you with a list of all currently created campaigns within the Supervisor client.

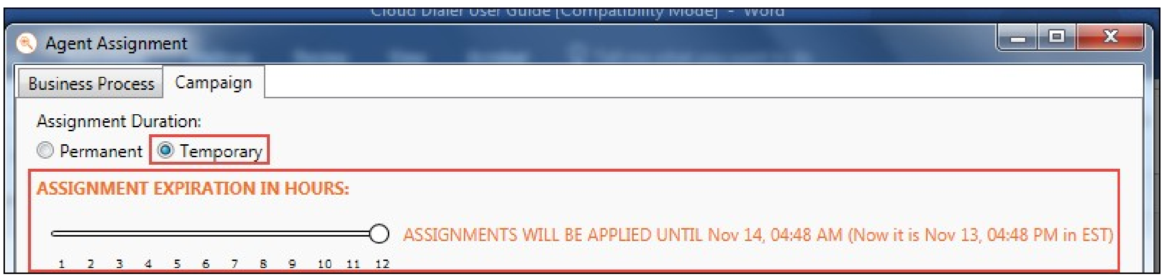


4. Clicking on a campaign will provide you with a list of agents that are currently active and available to take calls from that campaign.

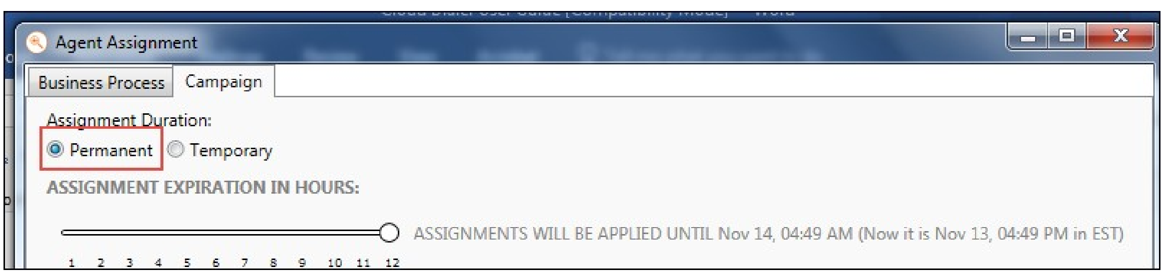


5. Within the active/inactive agents column there are two options to manage the agents:

    a. **Temporary Assignment Duration** – temporarily removes the agent from the campaign assignment. Set a time assignment expiration so the agent will automatically be placed back into the campaign as an active agent when the time limit expires.



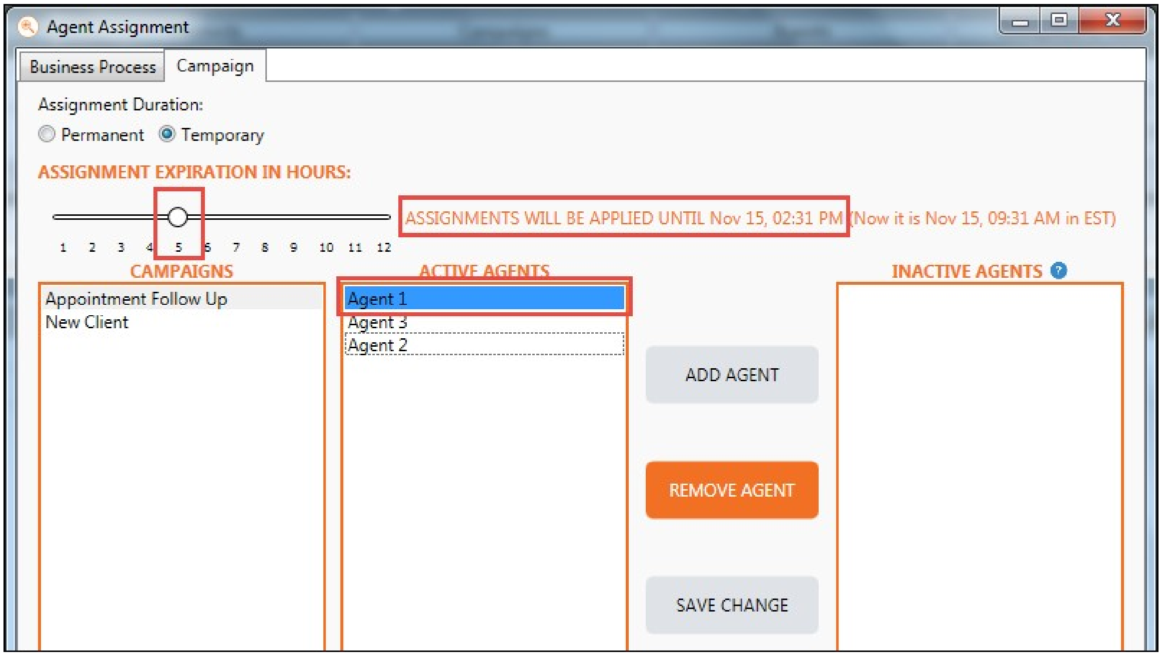
    b. **Permanent Assignment Duration** – permanently removes the agent from the campaign until the agent is manually placed back into the active agent's column.



6. **Temporary Assignment Duration:**

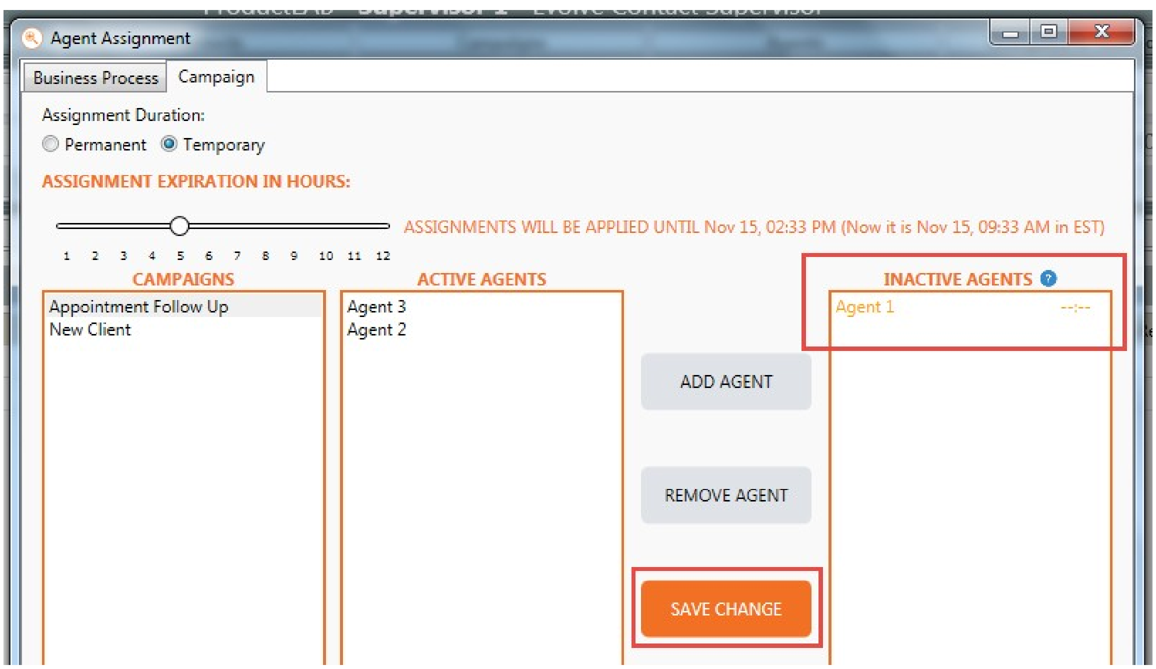
    a. Select the Campaign and Agent you wish to remove temporarily from the campaign. Ensure that the Temporary Assignment Duration is selected.

    b. Select Assignment Expiration in Hours for the agent. You will see the Assignment will be applied until (x) will be updated to showcase when the agent will be placed back in the queue.

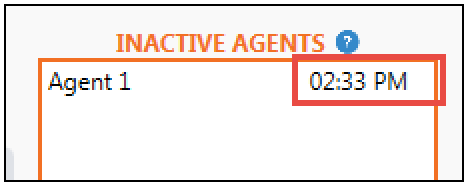


c. Select Remove Agent.

d. The Agent will be moved from the active to the Inactive Agents column. Select Save Change.

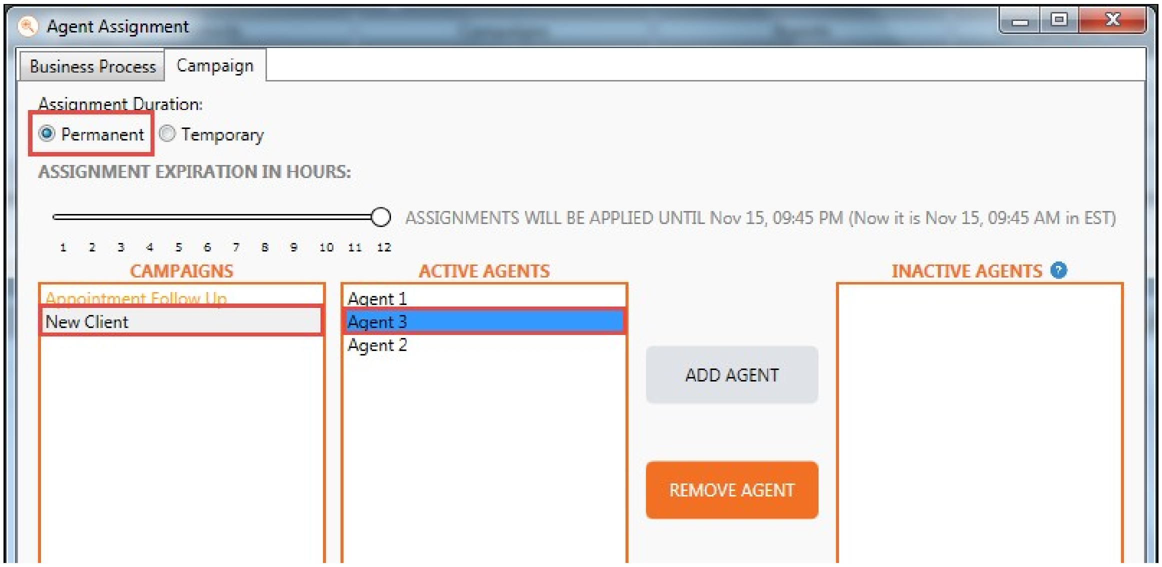


e. When the changes are saved the inactive agents time will be updated to show when they will be placed back into the active agents column to start receiving calls again from the campaign.



7. Permanent Assignment Duration:

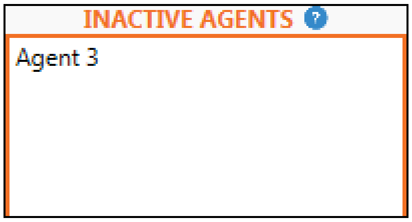
a. Select the Campaign and Agent you wish to permanently remove from the campaign. Ensure that the Permanent Assignment Duration is selected. The Assignment Expiration Hours will no longer be available.



b. Select Remove Agent

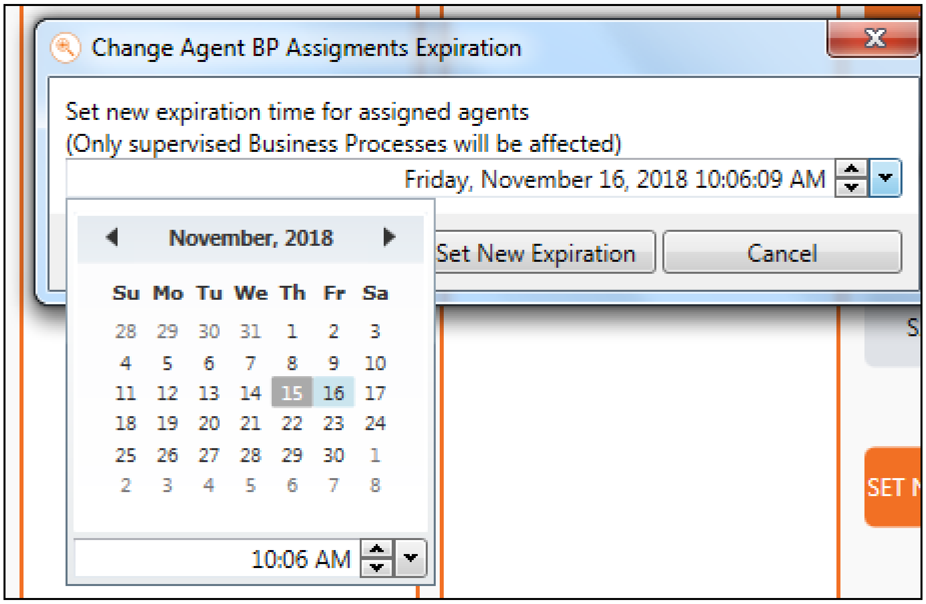
c. The Agent will be moved from the Active to the Inactive Agents column. Select Save Change.

d. The agent will be saved as an inactive agent and no longer receive calls from the campaign until manually moved back as an active agent.



8. Set New Expiration

The set new expiration allows you to set a new expiration time for agents that have been temporarily assigned to the inactive column of a campaign. Selecting the New Expiration tab will allow you to select a new time and even day for the agents expiration.



9. Reset

Reset allows for the reset of all agent assignments back to their original state.

1.2.13 Setting Up a Campaign (Best Practice)

This section provides you with a step by step guide on how to set up and run a Campaign.

	Note: Your administrator is responsible for setting up and preparing the proper IVR Business Process flow using the Evolve Contact Setup.
	Note: The supported file formats for importing targets are: XLSX, CSV(comma delimited) and XML that contains the Supervisor Client's relevant campaign fields.

The Scenario:

Your Contact Center needs to broadcast a special, personalized Christmas promotion to hundreds of your customers. You would like to schedule the Campaign to run two weeks before Christmas (from 12/09/10 to 12/23/10). This specific promotion is played to a customer without having to speak with an agent after listening to the announcement.

The campaign schedule will be set to run twice a day, in two different sessions:

- session 1 – campaign will run for every day of the week from 8:00 to 10:00
- session 2 – campaign will run from Monday to Friday (i.e. not on Saturday and Sunday) from 18:00 to 21:00

With the following exceptions to the above schedule:

- The campaign will not run on the 12/21/10 to the 12/22/10 (The contact center is closed for those two days due to renovations).
- The campaign will run on the 12/18/10 from 8:00 to 21:00 (which is a Saturday – the contact center management have decided that they are going to be open for that day).

1.2.13.1 Step 1 – Prepare Customer Records

Prepare a list, which contains all records of the customer's name and number. The list is compiled using either one of the following:

- XML file
- CSV (comma delimited file)

1.2.13.1.1 Step 2 – Ensure the proper flow and announcements have been built within the Correct Business Process (using the Evolve Contact Setup application)

1.2.13.2 Step 3 – Create a New Campaign

1. Click. to create a new campaign. A new line appears in the Work Area labeled New Campaign.
2. Click New Campaign to drill-down into the campaign settings window. Or
3. Right-click New Campaign and select Zoom In. The New Campaign settings window opens.

1.2.13.3 Step 4 – Start Building Your IVR Campaign (Definitions Tab)

1. Enter a campaign name (e.g. IVR Campaign – Christmas Promotion).
2. Select the Business Process, which is created (using the Evolve Contact Setup application) specifically for this campaign, from which the campaign will run

(e.g. IVR Campaign BP – Christmas Promotion).

3. Select the dialer type (i.e. type of campaign) from the drop-down list (e.g. IVR – for this type of campaign the customer will hear a pre-recorded message, and depending on how the flow was built in the Evolve Contact Setup, might also route the call to an agent).

4. The 'Create Time' field is an automatic field, displaying the actual time you started to build the campaign.

5. Enter the date in which the campaign will start running and the date in which it will end. (e.g. start: 12/09/10 end: 12/23/10)

6. Leave the demand field empty, as this Power Dialer Campaign flow was set to play an announcement to the customer without any agent intervention.

7. No remark/s are needed as this field is relevant only when agent intervention is necessary.

8. Select the relevant 'Order Strategy' from the available list (e.g. No. of attempts, File order and then Customer Request Order). This determines in which order the dialing lists are extracted from the database. This selection is based on the Supervisors discretion).

9. Select a 'Campaign Priority' (High, Medium or Low), if within the same Business Process there are a number of campaigns (other than Power Dialer), this will define which campaign will be prioritized.

100. The 'BP Maximum Pending Interactions' field (which is a read only field) is defined using the Evolve Contact Manager application, and appears blank, until the campaign has been saved. The number appearing here defines the maximum number of pending interaction in the business process (for all campaigns).

11. Set the 'Allow Duplicate Records' field to 'Disabled'. It is set to disabled as the dialing record list may not have the same phone number more than once.

12. Select the relevant Disposition Code set name (each code set name consists of numerous values) from the list that appears. Disposition codes are defined using the Evolve Contact Manager application.

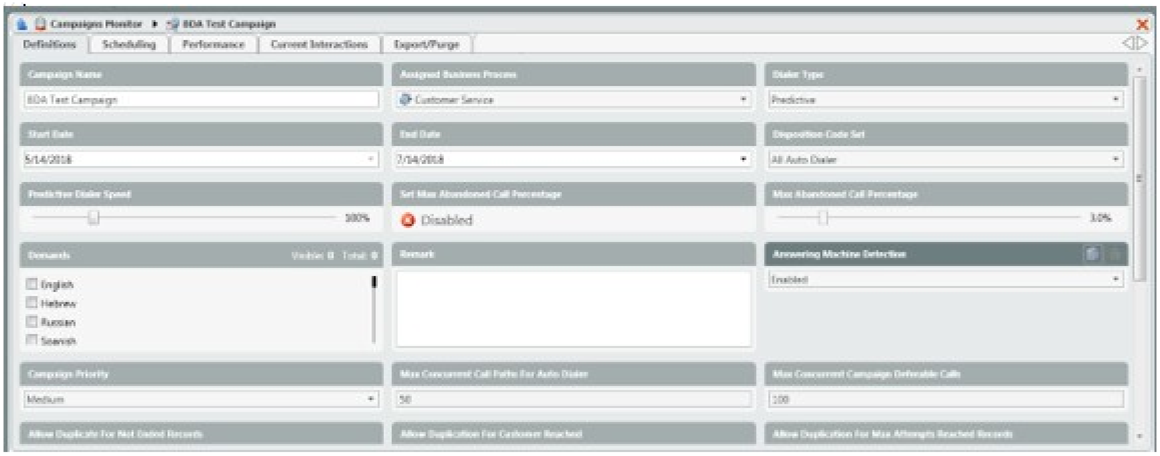


Figure 13: IVR Campaign – Christmas Promotion – Definitions Tab

1.2.13.4 Step 5 – Define Campaign Schedules (Scheduling Tab)

1. Enter a number (seconds) in the ‘Duration For No Answer’ field (e.g.30 seconds). This field defines how long the phone will ring on the customer side.
2. Enter a number in the ‘Attempts Before Failure’ field (e.g. 3). This defines how many times the system will try calling the number before marking it as Failed.
3. Enter a number (minutes) in the ‘Recall Interval In Case Of Busy’ field (e.g. 5 min). If the number dialed was busy, how long must the system wait before trying to dial the number again?
4. Enter a number (minutes) in the ‘Recall Interval In Case Of No Answer’ field (e.g. 5 min). If a number was dialed and there was no answer at the customer’s end, how long must the system wait before trying to dial the number again?
5. Optional- Select to send a failed or success record to an existing list or campaign. Select which list or campaign to send the records to.

5. Click in the Schedule panel and enter the following two different schedule sessions:

- 1st session will run: Every day of the week from 8:00 to 10:00

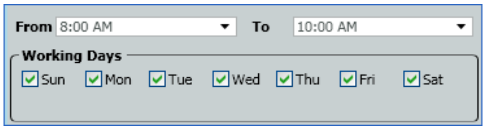


Figure 14: IVR Campaign – Christmas Promotion – Schedule 1

- 2nd session will run: Monday to Friday from 18:00 to 21:00

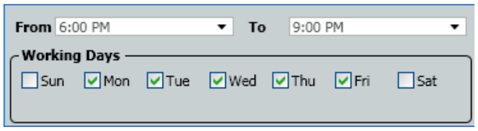


Figure 15: IVR Campaign – Christmas Promotion – Schedule 2

5. Click in the Schedule Exceptions panel and enter the following exceptions:

The campaign will not run on 12/21/10 from 08:00 to 12/22/10 at 21:00. These two dates will be ‘Excluded’ from the campaign (i.e. the campaign won’t run on both days even though the dates do appear in the regular schedule).

The campaign will run on 12/18/10 from 08:00 to 12/18/10 at 21:00. This date will be ‘Overridden’ (i.e. the campaign will run on the 18th of December even though in the regular schedule it is defined to run from 8:00 to 10:00).

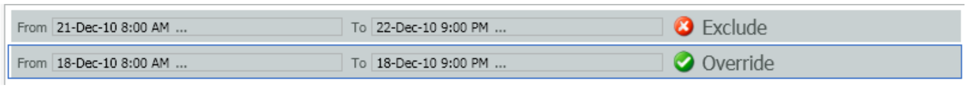


Figure 16: IVR Campaign – Christmas Promotion – Schedule Exceptions

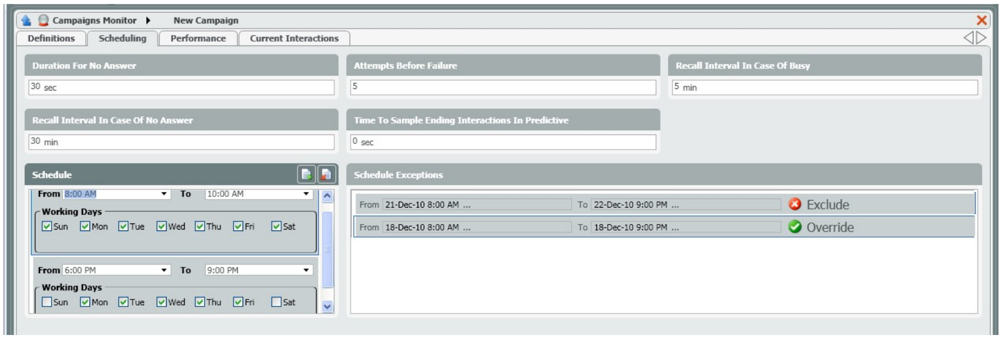


Figure 17: IVR Campaign – Christmas Promotion – Scheduling Tab

1.2.13.5 Step 6 – Save the newly created Campaign details

1. Click at the top of the Supervisor Client window to save all the campaign details entered. Return to the Work Area by clicking . Your newly created campaign will appear as a blue hyperlink.

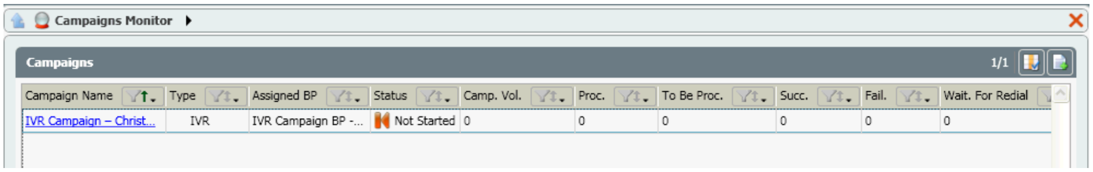


Figure 18: IVR Campaign – Christmas Promotion – Completed Campaign

1.2.13.6 Step 7 – Import Target (Upload customer record files)

1. Right-click your newly created campaign.
2. Select Import Targets From List to choose a list from the Select List drop down.

1.2.13.7 Step 8 – Activate the Campaign

1. Right-click your newly created campaign
2. Select Activate Campaign to start running your campaign.