



# **Administering Avaya IP Office Contact Center Dialer**

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# Chapter 1: Outbound dialer

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## Outbound dialer overview

Outbound dialer is the IP Office Contact Center function that starts automatic outbound calls. In an outbound call, an agent need not call a subscriber of the public network. For example, If you conduct a phone survey within a company, then the survey can be an outbound function.

Depending on the dialer mode, the IP Office Contact Center outbound dialer does one of the following tasks on connection:

- Starts the call from IP Office Contact Center, and then distributes the call to an available agent.
- Presents the call to an agent for preview, and then the agent starts the call.

In IP Office Contact Center, the basis of the call distribution process is jobs. The system starts a job for a topic.

Similar to the inbound function the programmable call distribution, task flow set, controls the outbound function. You can monitor the status of an outbound call, but you cannot change the call distribution process.

Apart from increasing the productivity of the agents, the system uses the IP Office Contact Center outbound functionality for the following:

- Informational campaigns
- Advertising campaigns
- Callback requests

**\* Note:**

Outbound dialing is regulated differently depending on the country where the call originates and is answered. When you configure the dialer parameters, you must ensure that the settings are in compliance with the local laws of the countries.



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# IP Office Contact Center outbound components

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## Outbound components overview

The primary components of the IP Office Contact Center outbound functionality are:

- Autodialer
- Kernel
- VECTORS
- Task server
- Dialer module
- PostgreSQL database

 **Note:**

You must add more components for special purposes, such as monitoring the dialer processes with the Realtime information module. You must also configure the required objects in the Configuration module.

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## Autodialer

The autodialer process runs on the IP Office Contact Center server. This process controls the automatic calls for the IP Office Contact Center system.

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## Kernel

The kernel process runs on the IP Office Contact Center server. The kernel has the states of all devices, agents, and calls.

### Task server

The task server adapts the telephone-specific features of PBX and provides services to the kernel process through the task server interface. This interface is uniformly defined for all task servers, such as voice and email, so that the kernel process need not distinguish between media types and PBX types.

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## VECTORS process

The VECTORS process runs on the IP Office Contact Center server and manages the distribution of jobs that require a compiled format of a task flow script. When you run a task flow set, the system converts the task flow set into a task flow script. The VECTORS process then loads and compiles the task flow script data from the database. If an error occurs during the compilation, the system

does not run the task flow set. If no error occurs, the VECTORS process runs the task distribution as defined with the task flow set.

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## Dialer module in the IP Office Contact Center user interface

The system uses the Dialer module as a tool to manage the outbound functions of IP Office Contact Center. You can configure, control, import, and export campaigns and jobs.

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## PostgreSQL database

In IP Office Contact Center, the system saves all outbound information in an internal CC database. The system uses the PostgreSQL database as a relational database management system for the IP Office Contact Center database.

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## Dialer types and modes

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### Dialer categories

The system determines the outbound category based on the target numbers that you enter for the dialer jobs. The outbound categories are:

Category	Description
Campaign dialer	When you enter the target number, the system does not determine which agent processes the job. The active task flow, which is the call distribution process of IP Office Contact Center, determines the job assignment to the agents.  In the IP Office Contact Center system, the system associates a campaign with a topic.
Agent dialer	When you enter target numbers in the system, the system assigns the job to an agent.

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### Types of dialers

The type of dialer depends on how the system establishes a call. You can select the dialer type and the corresponding dialing parameters in the Dialer module.

Dialer type	Description
Mechanic	The system starts a call to a customer from the IP Office Contact Center system. When the system establishes a connection, the system automatically connects to the available agent. To make the system efficient, the agents need not deal with unavailable customers or invalid numbers. However, unavailable agents are a risk when the system establishes a connection with the customer.
Direct	The system starts a customer call from the agent phone to ensure high degree of quality. This dialer ensures that the agent is available on contact when a customer is connected. Starting a call from the agent phone might affect efficiency when agents need to call unavailable customers or invalid numbers.
Preview	The system automatically provides the agent with the customer data and starts a customer call from the agent telephone with an action. For example, an agent starts a call by clicking a button. The system that provides customer data is a subform of the direct dialer. In the direct dialer, an agent can do preparatory work before starting a call.

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## Mechanic dialer modes of operation

You can select the required operation modes and the corresponding dialing parameters in the Dialer module. For mechanic dialing, the IP Office Contact Center system supports the following modes for the dialer operation:

Dialer mode	Description
Auto dialer	Starts a call only when an agent is available. This action requires a fixed dial factor of 1.0. The dial factor determines the number of calls that the system starts compared to the signed-on agents.
Power dialer	Starts as many calls as possible. The system ends the connections that the system cannot assign to an agent. The system sets a fixed value, for example, 2, for the dial factor. With the dial factor of 2, the system starts two calls for each available agent signed to the system.
Progressive dialer	Uses the settings to start more calls than the number of available agents. The system automatically adjusts the dial factor depending on the drop rate.

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## Factors affecting dialer configuration

When you configure a dialer, you must configure the settings according to the load.

Factors	Possible measures
Number of calls	Configure the IP Office Contact Center server for PBX to process calls to match the available lines.

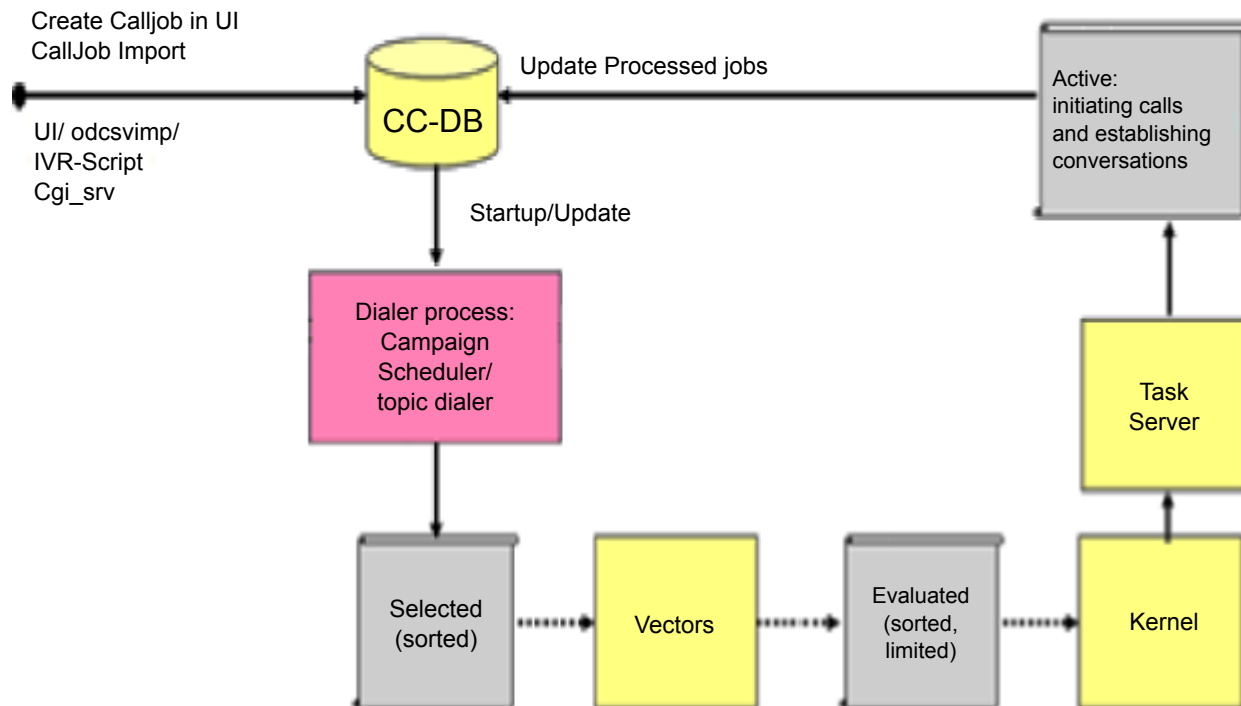
*Table continues...*

Factors	Possible measures
Number of available agents	Ensure that at least five agents are signed on to the respective agent group when you use an auto dialer or a progressive dialer.
Occupancy of agents	Configure the number of agents and the average conversation time to ensure the occupancy of agents.
Kind of customer service	Configure the dialer to accommodate a higher degree of customer service. For example, the number of call back requests might be more than the calls for a marketing campaign. The purpose of the dialer determines the kind of customer service.
Availability of the agents for other tasks	Ensure whether the agents process only outbound calls or answer incoming calls with the outbound calls. You must also take other tasks into account, which IP Office Contact Center processes. For example, an email.

## Method of operation

A test run determines the working method of a campaign dialer. You can verify the necessary parameters only with the test run.

The following schematic illustration displays the mode of operation of the outbound part of the IP Office Contact Center system:



## Dialer functions

The IP Office Contact Center dialer works as follows:

- The system writes the jobs to the database. You can either create a job with the Dialer module in the IP Office Contact Center system or import a list of call jobs. You can also save the call back requests from the Internet through the IP Office Contact Center server `component cgi_srv` as a call job.
- A scheduler evaluates the active time of the jobs. The system processes the jobs according to the configured active times.
- The system creates a list that contains all active jobs. The system sorts the entries according to the priority, yes or no status, and active time. The jobs with a limited active time, or resubmission jobs, have a higher priority than the jobs with an unrestricted active time.
- The system runs a number of jobs through the call distribution, known as the task flow set. Depending on the number of available agents, the system assigns jobs to a limited list. The calculation of the number of entries in the limited list is as follows:

`Number of entries = 2 * the number of signed on agents + 1`

This assessment of call distribution is known as test run or evaluation. With this test run, the system evaluates the call distribution and the agents, and creates a matching list. The list contains all jobs that the system processes at that moment.

- The system transfers the jobs in the limited list to the kernel process.
  - For Mechanic dialer: The system starts calls depending on the number of available agents and the dial factor. The calculation of the number of currently established calls is as follows:

`Number of currently established calls = Number of available agents * Dial factor - Number of currently active jobs`

When the system reaches a target subscriber, the call distribution picks an agent and establishes the connection between the target and an agent. If no agent is available at the moment, the system ends the connection.

 **Note:**

The number of established calls must not be greater than the number of jobs in the limited evaluation list. For example, you can establish maximum three calls for a signed-on agent even if the dial factor is greater than three.

- For Direct and Preview dialer: The system establishes connections with the target subscribers for the available agents determined by the call distribution. The status of agents during this time is busy, and the agents do not get any other calls.
- The system updates the status and qualifications of the processed jobs in the database.

## Features of progressive dialer

### Preset characteristics

The dialer control complies with the OFCOM criteria. The system does not exceed the configured drop rate of 24 hours.

The special characteristics of a progressive dialer type are:

Feature	Description
Start of dialer control	The progressive dialer begins after the start and the first initiation with the dialer control. During the first initiation, the system starts a call job for each free agent, independent of the configured dial factor.
Increase in dial factor	The system recalculates the dial factor every 2 seconds after starting the call jobs. The dial factor increases if the system attains the maximum drop rate. In addition to the number of free agents, the system also processes the number of reserved agents . Reserved agents are agents who are free at the required time from a call processing stand point. However, the system has already started a call job for the agent, but the call job is not yet connected to the destination subscriber.
Decrease in dial factor	The system decreases the dial factor when the drop rate reaches the configured maximum drop rate.
Drop rate calculation	<p>The system calculates the drop rate for each cycle after 2 seconds. The system calculates the ratio of abandoned customers to the total customers since the start of the dialer or for the last 24 hours:</p> $\frac{x}{x + y} * 100$ <p>Where x = abandoned calls and y = calls passed to a live operator.</p>

# Chapter 2: The Dialer module

---

## Dialer module overview

The Dialer module is a module in IP Office Contact Center that automates external IP Office Contact Center calls.

You must create certain IP Office Contact Center system objects in the configuration module to run the Dialer module. The Dialer module runs in IP Office Contact Center only if the IP Office Contact Center routes the calls. The Autodialer process in the Dialer module runs on the IP Office Contact Center server.

The Dialer module requires:

- Agents
- Topics
- Tags

The dialer module can operate in one of the following ways. You can control the method you want to use through the Task flow editor module.

Method of operation	Description
Exclusive use	You can assign an agent to answer an incoming call or to process an external call. Different agents can process incoming calls and outgoing jobs at different times.
Permanent use	When the load of incoming calls in the system is decreasing, the system automatically schedules the job that requires processing.

---

## Opening the Dialer module

### Before you begin

- Log in to the IP Office Contact Center user interface.
- Set the Dialer privilege in the Configuration module for the agents who needs to access the Dialer module.
- Configure the settings for VEA.



- Set *MaxCountofWaitQueueDevices* and *MaxCountofDialingDevices*.

You can configure the values to total more than 100%. For example, you can set 75% for queue devices and 65% for dialing devices. These settings enable optimum use of the devices for inbound and outbound calls and jobs.

- Configure the objects for the Dialer module, agents, and topics in the Configuration module, and sets the authorization for the interested campaigns and topics.
- Create a task flow using the Task Flow Editor module.

### Procedure

To open the Dialer module, do one of the following:

- On the **Go to** menu, click **Dialer**.
- In the left pane, click **Administration** and select **Dialer** .

The system displays the Dialer module user interface.

## Dialer module menus and icons

### Dialer menu field descriptions

Name	Description
<b>Management</b>	Displays the list of configured dialers.
<b>Campaign</b>	Displays the list of configured campaigns. You can create, edit, copy, or delete a campaign.

### Jobs menu field descriptions

Name	Description
<b>Create</b>	Creates a new job.
<b>Change</b>	Opens the selected job. You can change the settings for the selected job.
<b>Copy</b>	Copies the selected job.
<b>Delete</b>	Deletes the selected job.
<b>Reset</b>	Resets the selected job.
<b>Import</b>	Imports the selected jobs.

*Table continues...*

Name	Description
<b>Export</b>	Exports the selected jobs.
<b>Reporting</b>	Displays the report for the selected jobs and connections.

---

## Display menu field descriptions

Name	Description
<b>New</b>	Changes the view to the default view.
<b>Select All</b>	Selects all jobs.
<b>All jobs</b>	Displays the list of all jobs due for processing.
<b>Add agent</b>	Displays the list of all authorized agents. If you select an agent from the list, the system displays all call jobs assigned to the selected agent.
<b>Add campaign</b>	Displays the list of all authorized campaigns. If you select a campaign from the list, the system displays all call jobs assigned to the selected campaign.
<b>Add topic</b>	Displays the list of all authorized topics. If you select a topic from the list, the system displays all jobs assigned to the selected topic.
<b>Add tag</b>	Displays the tag and value. You can enter a tag and a value for the tag to search in the list of call jobs. You can use a tag and the value as search criteria.  You can use a tag and tag value as the search criteria to search for a value in the list of call jobs.

---

## Options menu field descriptions

Name	Description
<b>System dialing parameters</b>	Displays the system dialing parameters. You can configure the system dialing parameters.
<b>Topic dialing parameters</b>	Lists the existing topics. You can configure the dialing parameters for a topic.
<b>Agent dialing parameters</b>	Lists the existing agents. You can configure the dialing parameters for an agent.
<b>Number types</b>	Lists the number types.

*Table continues...*

Name	Description
	You can configure the number types.
<b>Settings</b>	Displays the update interval. You can configure the update interval.

---

## Window menu field descriptions

Name	Description
<b>Tool bar</b>	Hides or displays the toolbar.
<b>Status bar</b>	Hides or displays the status bar.
<b>Save settings</b>	Saves the active window settings.

---

## Columns overview

A column provides more information about the objects, such as the topics or agents groups. You can change the order of the columns in a table, or hide or display the columns.

### Changing the order

#### About this task

The objects in the table are listed in alphabetic order. You can sort the entries in ascending or descending order.

#### Procedure

- To sort the table according to a column, click the **Name** icon (▲).  
The system sorts the table in alphabetic order.
- To change the order, click the **Name** icon (▲) again.  
The system sorts the table in the reverse order.

### Configuring the columns

#### About this task

You can configure a table to display the required information.

#### Procedure

- In the table view, click **Columns**.  
The system displays the **Configuration of Columns** dialog box.
- Clear the **Use default settings** check box.

- To configure the visible columns, in the **Invisible columns** field, select an object and click the add icon ().

The system adds the selected object to the **Visible columns** field.

- To remove an object, in the **Visible columns** field, select an object and click the remove icon ().

You can use **Up** and **Down** to arrange the objects in the **Visible columns** field.

The system adds the selected object to the **Invisible columns** field.

- Click **OK**.

The system displays the table of objects with the configured columns.

## Searching the columns

### About this task

You can search for an entry in the table. You can also search for an object with certain settings. For example, you can search for an agent with a certain number.









### Procedure

In the search field at the bottom of the **Number** field, type the number.

The system displays the first entry that matches the number.

---

## Dialer toolbar field descriptions

Icon	Name	Description
	<b>Create job in database</b>	Creates a new job.
	<b>Change job in database</b>	Changes the selected job.
	<b>Copy job in database</b>	Copies the selected job, and adds a job to the list of jobs.
	<b>Delete job from database</b>	Deletes the selected job.
	<b>Reset job</b>	Resets the states and the active time period of the selected job.
	<b>Reporting</b>	Displays reports for the selected jobs and connections.
	<b>Campaigns</b>	Displays a list of configured campaigns. You can create, edit, copy, or delete a campaign.
	<b>Dialer Management</b>	Displays the configured dialers.

---

# Dialer options configuration

---

## Dialing parameters overview

You can define the dialing parameters for the system, topics, and agents. You can also use the default dialing parameters.

The limitations of an agent dialer are:

- Supports only the Direct and Preview dialer types.
- Uses the Auto Dialer mode and the Mechanic Dialer type only with direct calls.

If you want jobs to be evaluated as ACD calls, you must select the **Mark call as ACD** call option. If you also want to select a topic, you must assign the agent calls in reporting to a topic.

 **Note:**

If the call job of a preview or direct campaign needs to appear as an ACD call in reporting, you must select **Mark call as ACD**. If the call job needs to be counted in topic reporting, you must select a topic in the dialing parameters.

### Related links

[System dialing parameters](#) on page 20

[Topic dialing parameters](#) on page 20

[Campaign dialing parameters](#) on page 21

[Agent dialing parameters](#) on page 21

## System dialing parameters

You can use the system dialing parameters to configure the default settings for the agent dialer, the topic dialer, and campaigns.

The agent dialer and the topic dialer use the system dialing parameters as the default setting.

If you do not configure dialing parameters for a topic corresponding to a campaign, the system uses the system dialing parameters for the campaign.

 **Note:**

The system activates the configuration changes for a campaign after restarting the server components.

### Related links

[Dialing parameters overview](#) on page 20

## Topic dialing parameters

You can use the topic dialing parameters to configure the dialing parameters for a topic. If you do not define the dialing parameters for a topic, the topic uses the system dialing parameters.

**Related links**

[Dialing parameters overview](#) on page 20

**Campaign dialing parameters**

The dependencies for a dialing parameter of a campaign are:

- You can configure the required dialing parameters for each campaign.
- If you do not configure dialing parameters for a campaign, the campaign uses the dialing parameters of the assigned topic.
- If you do not configure dialing parameters for the selected campaign and the assigned topic, the campaign and topic use the system dialing parameters.

**Related links**

[Dialing parameters overview](#) on page 20

**Agent dialing parameters**

The dependencies of the agent dialing parameters are:

- If you do not configure the agent dialing parameters for an agent, the agent uses the system dialing parameters.
- If you change the agent dialing parameters, the new agent dialing parameters is set as the default setting.

**\* Note:**

The **Mark call as ACD** option is used to evaluate a job as an ACD call. If you want to evaluate the call jobs of an agent campaign in a topic report, you must assign the topic.

**Related links**

[Dialing parameters overview](#) on page 20

**Dialer types**

Dialer type	Description	Set to
Mechanic	Establishes the connection to the target subscriber before starting a connection with the agent.	<ul style="list-style-type: none"> <li>• System</li> <li>• Topic</li> </ul>
Direct	Establishes the connection between the agent and the target subscriber.	<ul style="list-style-type: none"> <li>• System</li> <li>• Topic</li> <li>• Agent</li> </ul>
Preview	Starts the connection from the agent to the target subscriber after a certain	<ul style="list-style-type: none"> <li>• System</li> <li>• Topic</li> </ul>

*Table continues...*

Dialer type	Description	Set to
	preview time has elapsed. In this type, the agent gets time to prepare the call.	<ul style="list-style-type: none"> <li>Agent</li> </ul>

**\* Note:**

The system inherits the dialer type from the topic.

## Dialer mode

You can specify the mode of operation only for the mechanic type dialers. The direct type and preview type dialers run only in the Auto Dialer mode.

Dialer mode	Description	Set for
Auto Dialer	Starts the call only when an agent is available.	<ul style="list-style-type: none"> <li>System</li> <li>Topic</li> <li>Agent</li> </ul>
Power Dialer	Starts as many calls as possible. If the system cannot assign a connection to an agent, the system disconnects the call.	<ul style="list-style-type: none"> <li>System</li> <li>Topic</li> <li>Agent</li> </ul>
Progressive Dialer	Uses the dialer settings to start more calls than the number of available agents.	<ul style="list-style-type: none"> <li>System</li> <li>Topic</li> </ul>

## Dialer mode field descriptions

You can configure the following settings for the dialer modes:


Name	Description	Set for
<b>Dial factor</b>	<p>Specifies the number of connections established compared to the number of available agents. A dial factor of 1 specifies that the number of connections established is equal to the number of available agents.</p> <p>For a dial factor of X:</p> <ul style="list-style-type: none"> <li>If number of available agents = minimum X/2 agents, the system</li> </ul>	<ul style="list-style-type: none"> <li>Power dialer</li> <li>Progressive dialer</li> </ul>

*Table continues...*



Name	Description	Set for
	<p>establishes <math>Y = X * \text{number of available agents connections}</math>.</p> <ul style="list-style-type: none"> <li>If the number of available agents are less than <math>X/2</math>, the system establishes fewer calls than the number of calls defined in the dial factor.</li> </ul> <p>For example, if only one agent is available, the system does not establish more than 3 calls.</p>	
<b>Max. drop rate</b>	<p>Specifies the maximum value in percentage of initiated call that are allowed to cancel after the destination answers the call because of unavailability of agents.</p> <p>You can enter the maximum drop rate with one decimal digit. For example, 1.4.</p>	<ul style="list-style-type: none"> <li>Progressive dialer</li> </ul>

## Dialing parameters settings

Name	Description
<b>Mark call as ACD call</b>	<p>Marks a call as an ACD call for the campaign. This call can be by an agent dialer, direct dialer, or preview dialer. You can select an access code from the list of access codes. The system starts an outbound ACD call by using the access code. For an agent dialer, you can also select a topic in the agent dialing parameters. The system uses this topic to start the call.</p> <p> <b>Note:</b> The agent requires the outgoing job code privilege.</p>
<b>Max. preview time</b>	<p>Specifies the maximum preview time in minutes and seconds. After the maximum preview time, the system automatically establishes a connection between the agent and the target subscriber. During the preview time, the agent is in the preview state, and the system does not assign ACD calls to the agent.</p>
<b>Max. number of dial attempts (DAs)</b>	<p>Specifies the maximum number of dial attempts allowed. This setting is the maximum value for the parameters <b>Max. number of attempts to busy destination</b>, <b>Max. number of attempts if destination does not answer</b>, and <b>Max. number of attempts with closures</b>. The dialer stops processing the job after the number of permitted dial attempts. The value 0 indicates an infinite number of attempts.</p>

*Table continues...*

Name	Description
<b>Max. number of DAs to busy destination</b>	Specifies the maximum number of dial attempts allowed to a busy destination. This value must be less than or equal to the <b>Max. number of dial attempts</b> . The dialer stops processing the job after the specified number of dial attempts. The value 0 indicates an infinite number of attempts.
<b>Max. number of DAs if destination does not answer</b>	Specifies the maximum number of permitted dial attempts if the destination does not answer. This value must be less than or equal to the <b>Max. number of dial attempts</b> . The dialer stops processing the job after the specified number of dial attempts. The value 0 indicates an infinite number of attempts.
<b>Max. number of DAs when dropped</b>	Specifies the maximum number of dial attempts allowed if the call ends while processing the call.
<b>Max. number of DAs with closures</b>	Specifies the maximum number of dial attempts allowed if the call reaches the destination and connects to the agent, but the destination is an answering machine, Fax, not the right partner, or the destination needs to be called again. This value must be less than or equal to the <b>Max. number of dial attempts</b> . The dialer stops processing the job after the specified number of dial attempts.
<b>Wait time between 2 DAs to busy destination</b>	Specifies the wait time in minutes between the dial attempts if the destination is busy.
<b>Wait time between 2 DAs with no answer</b>	Specifies the wait time in minutes between two dial attempts if the destination does not answer.
<b>Extend recall time if destination does not answer</b>	Specifies the extension of the recall time in percentage if the destination does not answer. If the value is 0, the system always uses the configured wait time.
<b>Wait time between 2 DAs when dropped</b>	Specifies the wait time in minutes between two dial attempts if the call ends while processing the call.
<b>Wait time between 2 DAs if customer hangs up</b>	Specifies the wait time in minutes between two dial attempts if the customer disconnects the call.
<b>Wait time between 2 DAs with closures</b>	Specifies the wait time in minutes between two dial attempts if the destination is not the right partner.

## Dialing parameters values

Dialing parameters	Default value	Minimum value	Maximum value
<b>Dial factor</b>	1.0	1.0	8.0
<b>Max. drop rate (in %)</b>	3	0	20
<b>Max. preview time (in mm:ss)</b>	1:00	00:00	30:00

*Table continues...*

Dialing parameters	Default value	Minimum value	Maximum value
Max. preview time overrun (in mm:ss)	00:00	00:00	5:00
Reminder time (before dialing) (in mm:ss)	00:00	00:00	60:00
Max. number of dial attempts (DAs)	1000	1	1000
Max. number of attempts to busy destination	1000	1	1000
Max. number of attempts if destination does not answer	1000	1	1000
Max. number of attempts when dropped	10	1	10
Max. number of attempts with closures	1000	1	1000
Wait time between 2 DAs to busy destination (in minutes)	1	1	1000000
Wait time between 2 attempts with no answer (in minutes)	5	5	1000000
Extension of recall time if destination does not answer (in %)	50	0	500
Wait time between 2 attempts when dropped (in minutes)	1	1	1000000
Wait time between 2 attempts if customer hangs up (in minutes)	1	1	1000000
Wait time between 2 attempts with closures (in minutes)	1	1	1000000

---

## Number types

When you create a job, you must enter a destination number and assign this number to one of the following number types:

- Phone (private)
- Phone (business)
- Fax (private)

The Dialer module

- Fax (business)
- Mobile (private)
- Mobile (business)

#### Related links

[Number types field descriptions](#) on page 26

[Creating a number type](#) on page 26

## Number types field descriptions

Name	Description
<b>Name</b>	Displays the name of the number type. For example, Telephone [home], Telephone [office], Mobile [home], or Mobile [office].
<b>Maximum ring time</b>	Displays the maximum ring time. You can enter a time between 00:05 minutes and 01:30 minutes. The default setting is 00:20 minutes. For a mobile number, you must set this value to more than the default value.
<b>Time Limits</b>	Displays the time restrictions. You can set the time limit in hh:mm format. For example, 08:00 a.m. to 12:00 p.m. You can also select weekdays.

#### Related links

[Number types](#) on page 25

## Creating a number type

### Procedure

1. On the **Options** menu, click **Number types**.  
The system displays the **Select number type** dialog box.
2. Click **Create**.  
The system opens the **Number type - Create** dialog box.
3. Enter the required settings.
4. Click **OK**.  
The system adds a new number type to the list of number types.

#### Related links

[Number types](#) on page 25

---

## Update interval overview

The update interval feature sets the time after which the system automatically updates the Dialer management and the reporting display. The default setting for this feature is 0, and the system updates the display automatically after each change.

After each change, IP Office Contact Center automatically updates data in the jobs and dialers, which are stored in the database. The update interval feature enhances the screen display and the reporting evaluations when you start the dialer. You can check the progress of the dialer by using the automatic data updating feature.

### Related links

[Setting the update interval](#) on page 27

## Setting the update interval

### Procedure

1. On the **Options** menu, click **Settings**.  
The system displays the **Settings** dialog box.
2. In the **Update interval** field, type the update interval time.
3. Click **OK**.

The system saves the update interval time.

### Related links

[Update interval overview](#) on page 27

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# Campaign

---

## Campaign overview

A campaign stores jobs with the same properties. For example, temporal settings is a campaign that stores the jobs with time limits. You must assign a campaign to a topic and configure a task flow for this topic. You can assign more than one campaign to a topic.

The logic, a task flow for each topic, contains the query whether the agents in the connected agent group are available. The system establishes the call if an agent is available, else disconnects the call.

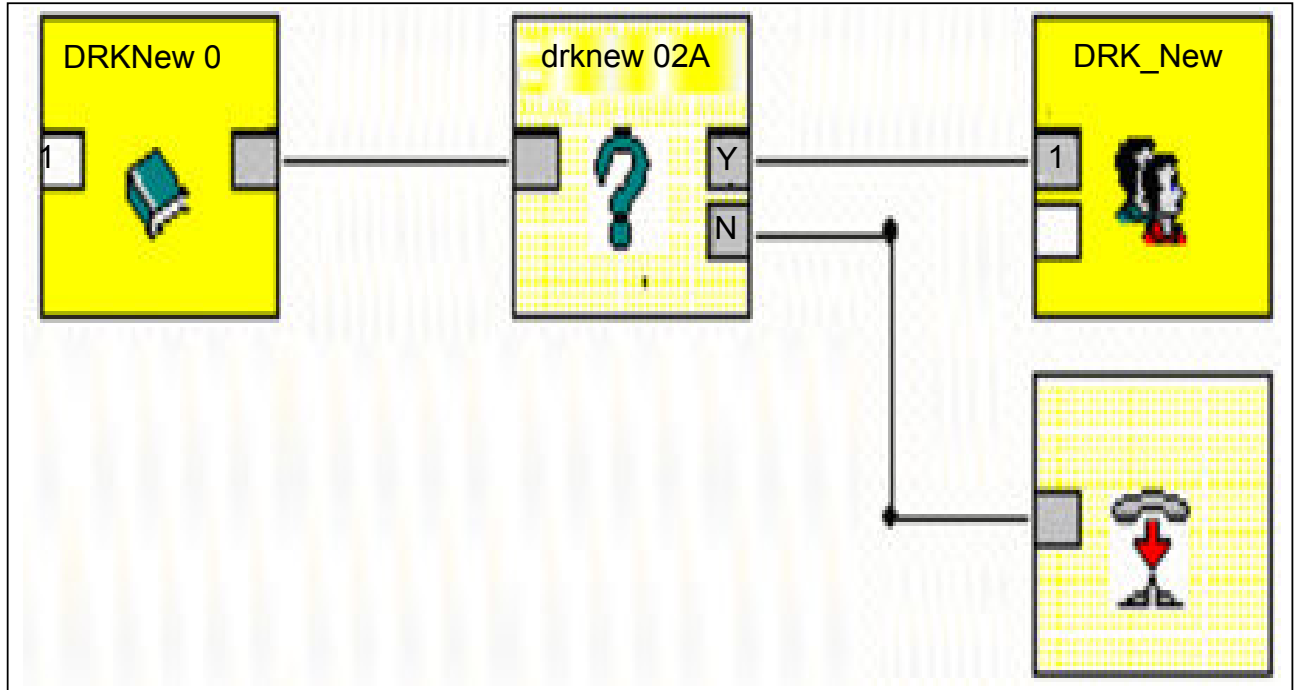


Figure 1: Task flow in a campaign

**\* Note:**

- You must not configure a topic-topic overflow with a logic or a connecting unit. You can link a topic only to one agent group.
- You can configure the authorization for topics and campaigns in the Configuration module. You can edit only the themes and campaigns that you are authorized to access.

## Active times field descriptions

You can process a campaign during the active time. You can create, change, or delete active times for a campaign.

Name	Description
<b>Start date</b>	The date when you start processing a campaign. You can select the start date from the calendar.
<b>Start time</b>	The time when you start processing a campaign. You can configure the start time.
<b>Stop date</b>	The date when you stop processing a campaign. You can select the stop date from the calendar.
<b>Stop time</b>	The time when you stop processing a campaign.

*Table continues...*

Name	Description
	You can configure the stop time.
<b>Limitations</b>	The time limits within which the system processes a campaign. You can set a time duration in hh:mm format. For example, 10:00 a.m. to 12:00 p.m.. You can also select weekdays.

---

## Creating campaigns

### Before you begin

- Select an access code in the **Mark call as ACD call** field when you create a Direct dialer or Preview dialer.

 **Note:**

During reporting, the system evaluates the jobs in the campaign as ACD calls when you select an access code.

- Select a topic for the campaign.

### Procedure

1. On the **Dialer** menu, click **Campaign**.  
The system displays the **Select Campaign** dialog box.
2. Click **Create**.  
The system displays the **Please select a topic for the campaign** dialog box.
3. Click a topic, and then click **OK**.  
The system displays the **Campaign [Edit]** dialog box.
4. In the **Name** field, enter an unambiguous name.
5. To configure dialing parameters for the campaign, click **Dial param**.  
The system displays the **Campaign dialing parameters [Create]** dialog box.
6. Clear the **Use system dialing parameters** check box.  
The system displays the settings for the campaign.
7. Enter the required settings.
8. Click **OK**.  
The system adds the campaign to the listed campaigns.



## Changing campaign settings

### Procedure

1. On the **Dialer** menu, click **Campaign**.  
The system displays the **Select Campaign** dialog box.
2. Click a campaign in the list, and then click **OK**.  
The system displays the **Campaign [Edit]** dialog box.
3. Enter the required settings.
4. Click **OK**.  
The system saves the settings and adds the campaign to the list of campaigns.

---

## Copying campaigns

### About this task

You can copy and use a campaign as a template for other campaigns.

### Procedure

1. On the **Dialer** menu, click **Campaign**.  
The system displays the **Select Campaign** dialog box.
2. Click a campaign in the list, and click **Copy**.  
The system displays the **Campaign [Edit]** dialog box.
3. Enter the required settings.
4. Click **OK**.  
The system saves the settings and adds the campaign to the list of campaigns.

---

## Deleting campaigns

### About this task

When you delete a campaign, the system removes the campaign from the list of campaigns. However, the system does not remove the campaign from the database. You can cancel the delete action.

You can also view the deleted campaigns and delete the campaigns permanently from the database.

### Procedure

1. On the **Dialer** menu, click **Campaign**.

- The system displays the **Select Campaign** dialog box.
- In the **Name** field, click a campaign, and then click **Delete**.  
The system displays a confirmation message.
  - Click **Yes**.  
The system deletes the campaign.

---

## Jobs

---

### Job overview

A job is an automatic call from IP Office Contact Center to an external number. You can create one or more numbers for one job and define separate active times for each number.

When you create a job, you must select an agent or a campaign for the job. The dialer processes a job. You must also assign a destination number and an access code for the job.

---

## Configuring access codes

### About this task

You can configure the access code in the Configuration module if you need a prefix number to dial the PBX that you configure.

### Before you begin

Open the Configuration module user interface.

### Procedure

- On the **Service** menu, click **PBX**.  
The system displays the list of PBXs.
- Double-click a PBX.  
The system displays the **PBX Configuration-Edit** dialog box.
- In the **Access code for dialer** field, enter an access code.  
The system assigns the access code to the dialer.

---

## Job destinations field descriptions

Name	Description
<b>Number</b>	Displays the destination number.
<b>Kind</b>	Specifies the number types. You can assign a number type for the job. For example, you can assign Telephone [home], Telephone [office], Mobile [home], or Mobile [office].
<b>Active time periods</b>	Displays the active times for destinations.
<b>Next attempt</b>	Displays the time at which a job makes the next dial attempt.
<b>State</b>	Displays the active state of the number assigned to the job.

---

## Active times field descriptions

You can process a job during the active time. You can create, change, or delete active times for a job.

Name	Description
<b>Start date</b>	The date at which you start processing a job. You can select the start date from the calendar.
<b>Start time</b>	The time at which you start processing a job. You can configure the start time.
<b>Stop date</b>	The date at which you stop processing a job. You can select the stop date from the calendar.
<b>Stop time</b>	The time at which you stop processing a job. You can configure the stop time.
<b>Limits</b>	Time limits for the system to process a job. You can set a time duration in hh:mm format. For example, 10:00 a.m. to 12:00 p.m.. You can also select weekdays.

---

## Job tag


You can add one or more tags to a job. You can create, change, or delete tags. You can also assign a value to the tag.

You can use tags in IP Office Contact Center. For example, you can displays the tags in the Telephony module.

---

## Selecting an agent dialer for a job


### Procedure

1. From the jobs list, double-click a job.  
The system displays the **Call [Edit]** dialog box.
2. To select an agent dialer, click the agent icon ().  
The system displays the **Select agent** dialog box.
3. Click an agent, and click **OK**.  
The system displays the agent name in the **Dialer** field.

---

## Selecting a campaign dialer for jobs



### Procedure

1. From the jobs list, double-click a job.  
The system displays the **Call [Edit]** dialog box.
2. To select a campaign dialer, click the campaign icon ().  
The system displays the **Select Campaign** dialog box.
3. Select a campaign, and click **OK**.  
The system displays the campaign name in the **Dialer** field.

---

## Creating jobs

### Procedure

1. On the **Jobs** menu, click **Create**.  
The system displays the **Call [Edit]** dialog box.
2. To assign a dialer to the job, do one of the following actions:
  - Click the agent icon (.
  - Click the campaign icon (.
3. In the **Destination** field, enter the destination details.
4. In the **Active time periods** field, enter the active time details.
5. To attach a tag to the job, in the **Tags** field, select a tag and enter the details.  
The system displays the name and the value for each tag.

6. Click **OK**.

The system displays the job name in the job list.

 **Note:**

When you create a job for an agent for the first time, the agent dialer is in the **Stopped** state. You must start the agent dialer with Dialer management.

---

## Changing the job settings

### About this task

You can change the following settings for a job:

- Campaign
- Destination number
- Job data
- Active time period
- Tag

### Procedure

1. From the job list, click a job.
2. On the **Jobs** menu, click **Change**.  
The system displays the **Call [Edit]** dialog box.
3. Enter the required settings.
4. Click **OK**.  
The system displays the job in the job list.

---

## Changing the settings for multiple jobs

### Procedure

1. From the job list, select the jobs.
2. On the **Jobs** menu, click **Change**.  
The system displays the **Change jobs** dialog box.
3. Select one of the following options:
  - **Overwrite job data except destination number**
  - **Add changes to job data**
  - **Standardize active time periods**
  - **Standardize Tags**

4. Click **OK**.

The system displays the **Call [Edit]** dialog box.

5. Enter the required settings.

6. Click **OK**.

The system displays the jobs in the job list.

#### Related links

[Call jobs field descriptions](#) on page 35

## Call jobs field descriptions

Name	Description
<b>Overwrite job data except destination number</b>	Deletes all data configured for dialers, dialing parameters, active times, and tags. You can set new data for the job. The system does not delete the destination number of the job.
<b>Add changes to job data</b>	Adds more active times and tags. The system adds new data to the previous data.
<b>Standardize active time periods</b>	Deletes all active times. You can add new active time.
<b>Standardize Tags</b>	Deletes all tags. You can add new tags.

#### Related links

[Changing the settings for multiple jobs](#) on page 34

---

## Copying jobs

### About this task

You can use a job as a template for other jobs.

### Procedure

1. From the job list, click a job.
2. On the **Jobs** menu, click **Copy**.  
The system displays the **Call [Edit]** dialog box.
3. Enter the required settings.
4. Click **OK**.  
The system displays the job in the job list.

## Deleting jobs

### About this task

You cannot restore a deleted job.

### Procedure

1. From the job list, click a job.
2. On the **Jobs** menu, click **Delete**.  
The system displays a confirmation message.
3. Click **Yes**.  
The system deletes the job from the database.

---

## Resetting jobs

### Procedure

1. From the job list, click a job.
2. On the **Jobs** menu, click **Reset**.  
The system displays a confirmation message.
3. Click **Yes**.  
The system resets the states and active times of the job.

### Related links

[Resetting multiple jobs](#) on page 36

## Resetting multiple jobs

### About this task

You can delete the states and active times of multiple jobs by resetting the jobs.

### Procedure

1. Select the jobs.
2. On the **Jobs** menu, click **Reset**.  
The system displays a confirmation message.
3. Click **Yes**.  
The system resets the states and active times of the selected jobs.

### Related links

[Resetting jobs](#) on page 36



## Import and export of jobs

### Job import and export

You can import or export a job data without recording the existing data again. You must select a data file and a control file for importing and exporting the job. When you export data using an application, you must create a control file for the job. For example, when you export data in .CSV format using Microsoft Excel, you must create a control file for the job.

#### Import data file

The import data file consists of data that you want to import to a job. You must arrange the data in rows. You can use commas to separate the values of a record in a row and to divide the rows into columns. The extension of an import file is .CSV.


#### Control file

The control file defines the data types of the data in the columns of the import file.

The first column of the control file specifies the data type of data in the first column of the import file. The data types in the control file are case sensitive. The extension of a control file is .txt.

### Data types

The data types for importing and exporting data are:

Name	Description
<b>Destination Number</b>	<p>Imports destinations. A destination can be a number sequence or a vanity number.</p> <p>You can import more than one number for a call job. You can specify the start date, stop date, or time for each phone number. You can use a semicolon to separate the date in the data type.</p>
<b>Dialer</b>	<p>Imports the dialer for a job using the dialer name. You must use the dialer types in the following order:</p> <ul style="list-style-type: none"> <li>• Agent</li> <li>• Topic</li> <li>• Campaign</li> </ul> <p> <b>Note:</b></p> <p>If you select a Sales Agent dialer and a Sales Campaign dialer, the system assigns the job to the Sales Agent dialer.</p> <p>You can use Topic dialers only for customized solutions. For example, if a customer wants you to call back to the number specified on a website, you can create a topic for this call. You can create topic dialers by using the import interface.</p>

*Table continues...*

Name	Description
<b>Prio</b>	Displays the priority for a job started at a certain time. This value must be 0 or 1.
<b>Active time</b>	<p>Displays the following active time details:</p> <ul style="list-style-type: none"> <li>• <b>Start time</b></li> <li>• <b>Stop time</b></li> <li>• <b>Start date</b></li> <li>• <b>Stop date</b></li> </ul> <p>You need not define all four columns in the control file. The system uses the default values for the empty columns. If all the columns are empty, the system does not configure an active time for the job.</p> <p><b>Start time</b> and <b>Stop time</b> are the values for time limitations that reoccur daily.</p> <p>The time format that you use for the active time must be same as the time format that you use in the Dialer module.</p> <p>You can use hh:mm:ss or the U.S format for time, and the DD:MM:YY or DD/MM/YYYY format for date.</p>
<b>CallTag (Tag Name)</b>	<p>Imports a value for the tag.</p> <p>You can import the value for a tag only if you create a <b>CallTag Name tag</b> field in the Configuration module.</p>
<b>NOP</b>	<p>Specifies that the column is NOP.</p> <p>If the system ignores data in a column, the system marks the column as NOP. You can use NOP in a control file.</p>
More export settings:	
<b>NextTime</b>	Specifies the time for the next dial attempt.
<b>NextDate</b>	Specifies the date for the next dial attempt.
<b>NoTries</b>	Displays the number of dial attempts.
<b>LastInitDate</b>	Displays the date of the last attempt.
<b>LastInitTime</b>	Displays the time of the last attempt.
<b>State</b>	Displays the qualification of the job, such as closure or right party contact.

## Creating import files

### Procedure

1. Open Notepad.
2. Create a text file with the required information.

For example,

```
"0711135860", "Campaign 1", "Telephone", "1"
"0711135870", "Campaign 2", "Radio", "0"
```

You must not use control characters in the text.

3. Save the file with the `.CSV` extension.

## Creating control files

### Procedure

1. Open Notepad.
2. Create a text file with the required information.

For example,

```
DestinationNumber
Dialer
NOP
CallTag(BT_Info)
```

You must not use control characters in the text.

3. Save the file with the `.txt` extension.

## StartDate and StartTime for import

You can restrict the active time period for a call job by importing the date and time. The time format for the import file depends on the regional time settings.

You can create a Config file with the following text for importing:

```
DestinationNumber
CallTag(CCK_Caller_Name)
Dialer
StartDate
StartTime
StopDate
StopTime
```

You can create a data file with the following text for importing:

```
"80123100","Duck,Donald","Welcome1","04.11.14","15:00","04.11.14","23:00"
"80123200","Duck,Daisy","Welcome1","10/11/2014","7:00:22AM","11/12/2014","10:00:44AM"
```

## Call job with phone numbers example

You can import more than one number for a call job. This example uses two phone numbers with the defined time. The time format for the import file depends on the regional settings.

### Note:

The dialing parameter Max. number of dial attempts (DAs) must be equal to or greater than the number of phone numbers.

### Control file example

```
DestinationNumber
CallTag(CCK_Caller_Name)
NOP
NOP
Dialer
StartDate
StopDate
StartTime
StopTime
```

## Data file example

```
"80123115";"80123114","Duck,Donald","Place.
3","London","Welcome1","05/06/2014";"10/12/2014","11/12/2014";"30/12/2014","7:00:22
AM""8:00:33PM","10:00:44 AM";"11:00:55 AM "
```

## Importing jobs

### Before you begin

Create a control file and an import file in the same folder.

### Procedure

1. On the **Jobs** menu, click **Import**.

The system displays the **Import file** dialog box.

2. Click a file, and click **Open**.

The system starts the import process by running a program in a MS-DOS box. The system imports data to the database. The TTrace program displays the possible error messages. You can change, copy, or delete data that you import.

## State filters for export

The system exports only the job that matches the condition of the filter. If the job status is `Ended` or `Failed`, the system does not dial the job again.

A job has different states, such as `Failed`, `Invalid number`, or `Destination not reachable` [`Failed,InvalidNumber,DestinationNotReachable`].

If the destination is unavailable, the system assesses the destination as bad and marks the job as `Failed`.

The successful state filters are:

Name	Description
Ended [Ended]	Specifies that the job is over. The system does not dial this job again.
Right Party Contact [RPC]	Specifies that the system stopped processing the job and the agent marked the job as done in the First screen module.
Fax [Fax]	Specifies that a fax machine answers the call.
AM [AM]	Specifies that an answering machine answers the call.
Closure [Closure]	Specifies that the system dials the job again at the specified time.

The state filter errors are:

Name	Description
Failed [Failed]	Specifies that the destination is not reachable. The system does not dial the job again.
Failed (n destinations) [AllAddrFailed]	Specifies that the destination is not reachable. The system does not dial the job again.

*Table continues...*

Name	Description
Invalid data [InvalidData]	Specifies that the job contains invalid data such as invalid times.
Timed out [TimedOut]	Sets the next dial attempt after the end of the active time.
Max. number of dial attempts reached [MaxTriesReached]	Specifies that the maximum dial attempts are over.
Invalid number [InvalidNumber]	Specifies that the destination is not reachable or the number is invalid.
Wrong number [WrongNumber]	Specifies that the target subscriber is wrong or the PBX reports the following message:  No connection with the number.
Contact failed [ContactFailed]	Specifies that the target subscriber disconnects the call before the agent answers.
Destination busy [DestinationBusy]	Specifies that the destination is busy.
Destination not reachable [DestinationNotReachable]	Specifies that the target subscriber does not answer.
Dropped [Dropped]	Specifies that the target subscriber answers the call, but no agent is available to process the call. The system disconnects the call.
Cancelled (customer) [Canceled (customer)]	Specifies that the target subscriber disconnects the call before assigning to an agent.

Name	Description
Init [Init]	Specifies that the system is processing the job.
Prio [Prio]	Marks a job that is treated preferentially, such as callback through Telephony.

## Exporting jobs

### Before you begin

Create a control file.

### Procedure

1. On the **Jobs** menu, click **Export**.  
The system displays the **Export** dialog box.
2. Click a control file, and click **Edit**.  
The system opens the file in the editor.
3. To export the job, select one of the following options:
  - **Export selected jobs only**
  - **Export all jobs**
4. **(Optional)** Select **State filters**.

If you select a state filter, the system exports only the job that matches the filter.

5. Click **OK**.

If the export is successful, the system creates the import file.

If the export fails, the system displays an error message.

## Views

### View field descriptions

The View list displays the jobs, agents, campaigns, or topics depending up on the object that you select. You can select a field from the list, and the system displays the corresponding jobs.

Name	Description
Dialer	The name of the dialer
Destination	The destination of the job
Next attempt	The date and time of the next dial attempt
State	The state of the dialer

The State column displays the following dialer states:

Name	Description
<i>Init</i>	Specifies that the system is initializing the job.
<i>Ended, Right Party Contact</i>	Specifies that the system processed the job. The agent marks the job as done in the Telephony module.
<i>Closure</i>	Specifies that the system completed processing the job.
<i>Ended, Closure, Max. number of dial attempts reached</i>	Specifies that the job is over because the system reached the maximum number of dial attempts.
<i>Destination busy</i>	Specifies that the destination is busy.
<i>Destination not reachable</i>	Specifies that the system cannot reach the destination.
<i>Ended, Closure, Fax</i>	Specifies that a fax machine answers the call.
<i>Ended, Closure, AM</i>	Specifies that an answering machine answers the call.
<i>Destination busy</i>	Specifies that the destination is busy. The system disconnects the call.
<i>Dropped</i>	Specifies that no agent is available, and the system disconnected the call.
<i>Failed, Invalid number</i>	Specifies that the destination is wrong.
<i>Rejected (agent)</i>	Specifies that an agent rejects a preview call job during the preview time.

---

## Adding agents

### Procedure

1. On the **Display** menu, click **Add agent**.  
The system displays the **Select agent** dialog box.
2. Click an agent, and then click **OK**.  
The system adds the job to the view list for the selected agent.

---

## Adding campaigns

### Procedure

1. On the **Display** menu, click **Add campaign**.  
The system displays the **Select Campaign** dialog box.
2. Click a campaign, and then click **OK**.  
The system adds the job for the selected campaign to the view list.

---

## Dialer management

---

### Dialer management overview

The system assigns each campaign, topic, and agent job to an instance in the Auto dialer process. For example, check the status: stop and start. You can manage these instances with the Dialer management. The Dialer management lists the campaigns and jobs.



With the Dialer management, you can:

- Change a dialer.
- Change a campaign.
- Open reporting.
- Start or stop a dialer.




## Dialer management list field descriptions

Name	Description
<b>Name</b>	Displays all dialers with the assigned jobs and types.
<b>Status</b>	<p>Displays the states of the dialers.</p> <p>The options are:</p> <ul style="list-style-type: none"> <li>• <b>Started:</b> The system starts the dialer.</li> <li>• <b>Standby:</b> The dialer is on stand by because the system is not in active time.</li> <li>• <b>Sleeping:</b> The dialer is running, but no signed on agents are available.</li> <li>• <b>Running:</b> The dialer is running.</li> <li>• <b>Stopping:</b> The dialer is not running. The system processes the jobs that were active before the dialer stopped. Active jobs include jobs for which the system is establishing a connection.</li> <li>• <b>Stopped:</b> The system stops the dialer because active jobs are unavailable.</li> </ul>
<b>Active</b>	Displays the number of active jobs for the selected dialer.
<b>Processed</b>	Displays the number of processed jobs for the selected dialer.
<b>Total</b>	Displays the number of jobs for the selected dialer.

## Dialer management icon descriptions


Icon	Name	Description
	<b>Campaigns</b>	Specifies whether the job is ready, started, or stopped.
	<b>Campaign finished</b>	Specifies that all call jobs of the campaign are finished and no open jobs are available.

## Dialer management toolbar

Icon	Name	Description
	<b>Start</b>	Starts the selected dialer.
	<b>Stop</b>	Stops the selected dialer.
	<b>Change Dialer</b>	Opens the selected dialer. You can change the settings.

*Table continues...*



Icon	Name	Description
	<b>Reporting</b>	<p>Displays statistical information about all or selected call jobs.</p> <p>The system displays the following information:</p> <ul style="list-style-type: none"> <li>• <b>Time of last update</b></li> <li>• <b>Jobs</b></li> <li>• <b>Number:</b> Number of selected jobs</li> <li>• <b>Last attempt:</b> Timestamp of the last action of the dialer</li> <li>• <b>Connections</b></li> <li>• <b>Attempts:</b> Number of dial attempts</li> <li>• <b>Released by system:</b> Number of drop cases</li> </ul>

---

## Active times priority


Dialer type	Priority
Job	1
Campaign	2
Topic	3

The priority indicates the active time that is applicable. For example, if you set an active time for a topic and a campaign, the active time of the campaign applies. In the agent dialer, the active time of the job applies.

---

## Changing dialers

### Procedure

1. In the dialer list, click a dialer and click the **Change** icon ().  
The system displays the **Call [Edit]** dialog box.
2. Change the required settings, and then click **OK**.  
The system displays the dialer in the dialer list.

## Starting and stopping dialers

### Procedure

In the list of dialers, click a dialer and do one of the following:

- To start a dialer, click the **Start** icon (▶).
- To stop a dialer, click the **Stop** icon (◻).

---

## Troubleshooting Dialer module

---

### A dialer does not display a topic or a campaign

#### Solution

You must configure themes and campaigns in the Configuration module. You can edit only the topics and campaigns that you are authorized to access.

---

## OFCOM Rules

OFCOM specifies the following rules for operating a dialer:

- The minimum call time for a call must be more than 15 seconds.
- The maximum time for calls passed to agents must be less than or equal to two seconds.
- The maximum drop rate must be less than or equal to 3% of all successful connections for each campaign over 24 hours.
- The waiting time between two dial attempts for a phone number during a dropped call must be greater than 72 hours.
- The system must send a phone number and caller ID.

---

## Too many calls initiated for a Mechanic dialer

If you configure more than one campaign for a topic, the system initiates more than one call for the same free agent. For example, the system initiates  $n$  calls for each agent for  $n$  campaigns on topic 1.

When you configure more than one campaign with a specific topic and an agent group for each agent, and if the agents log on to several agent groups, the system initiates a call for each campaign that the agent processes. This action is based on the agent assignment to the agent groups.

---

## Maintaining the maximum drop rate for Mechanic dialer

You can maintain the drop rate by ensuring that:

- The agents log on only to one outbound agent group.
- A topic uses only one active campaign.
- The dialer operates only as a progressive dialer, and you use a dial factor of 1.

---

## The same agent always receives the call with the Direct dialer or the Preview dialer

If more than one agent is active for each topic, the system selects the first agent from the list of agents for each campaign.

For an even load for all agents, only one campaign must be active for a topic and the agent must log on to only one outbound agent group.

---

## Divided active times occurs

When the IP Office Contact Center server and the supervisor client are in different time zones, you need not take the active times in to account.

During the daylight-saving time, the configured daily restrictions for active times shifts by 1 hour. The dialer cannot evaluate the active times accurately. The system might divide a daily restriction in to two restrictions. For example, for a dialer in the time zone GMT+1, a daily restriction from 00:00 to 08:00 for Monday results in two daily restrictions 00:00 to 01:00 and 01:00 to 08:00 on the same day.

---

## Adding notes for a call

### About this task

You can use any name for CallTag if you only want to display a note. You can use the `OD_PERS_` prefix for the name of CallTag to change a note in the Telephony module. When the agent completes and qualifies the *CallJob* in the Telephony module, the system sends the CallTags that has `OD_PERS_` prefix and keeps the network traffic minimum.

### Procedure

1. In the Configuration module, create CallTags.

For example, you can configure the names for read-only CallTag and the editable `OD_PERS_Note` CallTag.

2. In the Telephony module, create the Tag fields.

For example, create the name and OD\_PERS\_Note tag fields and enable the **Value can be modified** option for the OD\_PERS\_Note tag.

**\* Note:**

In the default Telephony screen, this field is available on the **Outbound** tab.

3. Create the import files.
4. Import data in the Dialer module.
5. Start the campaign.

An agent can edit the field OD\_PERS\_Note with the Telephony module.

6. Export and evaluate data.

### Import and export files example

Import control file:

```
DestinationNumber  
Dialer  
CallTag(name)  
CallTag(OD_PERS_Note)
```

Import file:

```
"886113469","campaign","u-room","value1"  
"88616791","campaign","4711","value2"
```

Export control file:

```
DestinationNumber  
Dialer  
CallTag(name)  
CallTag(OD_PERS_Note)  
State
```

Export file:

```
"886113469","campaign","u-room","1xBCC","Ended, rpc"  
"88616791","campaign","4711","ordered PBX","Ended, rpc"
```

---

## Configuring the timed import

### About this task

You can use the `odcsvimp.exe` program for the timed import of jobs. The parameter for the import of jobs is `odcsvimp -tt <ttraceHost> -nsh <namingservice> <import file>`.

**\* Note:**

You must indicate the import file at the end of the parameter.

### Procedure

1. Create data file and control file.

2. On the computer that runs the user interface, create a batch file calling up the `odcsvimp` program.

For example, `odcsvimp -tt <ttraceHost> -nsh <namingservice> <import file>`.

3. Create a scheduled task with the operating system of the computer calling up the created batch file.

---

## Configuring the timed export

### About this task

You can use the `odcsvimp.exe` program for the timed export of jobs. The parameter for the job export is: `odcsvimp -tt <ttraceHost> -nsh <namingservice> odcsvimp -ctrl <export ctrl file> -export -dialer <Name of the campaign> <import file>`.

The supported keywords for export are:

- DestinationNumber
- CallTag(CCK\_Caller\_Name)
- State
- NoTries
- LastInitDate
- LastInitTime
- StartDate
- StopDate

You must add the name of the export file at the end of the parameter.

### \* Note:

You can also delete the exported data. To delete data, you must use the `-delete` parameter instead of `-export`. For example, `odcsvimp -ctrl c:\od\exporthy.txt -delete -dialer Welcome1 c:\od\exporthy.csv`.

### Procedure

1. Create data file and control file.
2. On the computer running the user interface, create a batch file calling the `odcsvimp` program.  
For example, `odcsvimp -tt <ttraceHost> -nsh <namingservice> -ctrl c:\od\export.txt -export -dialer Welcome1 c:\od\export.csv`.
3. Create a scheduled task with the operating system of the computer calling the created batch file.

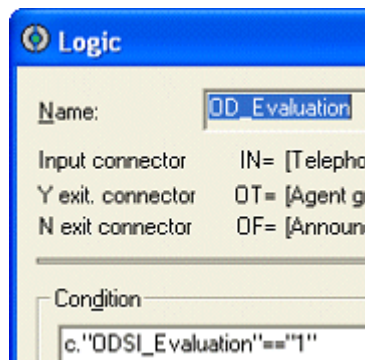
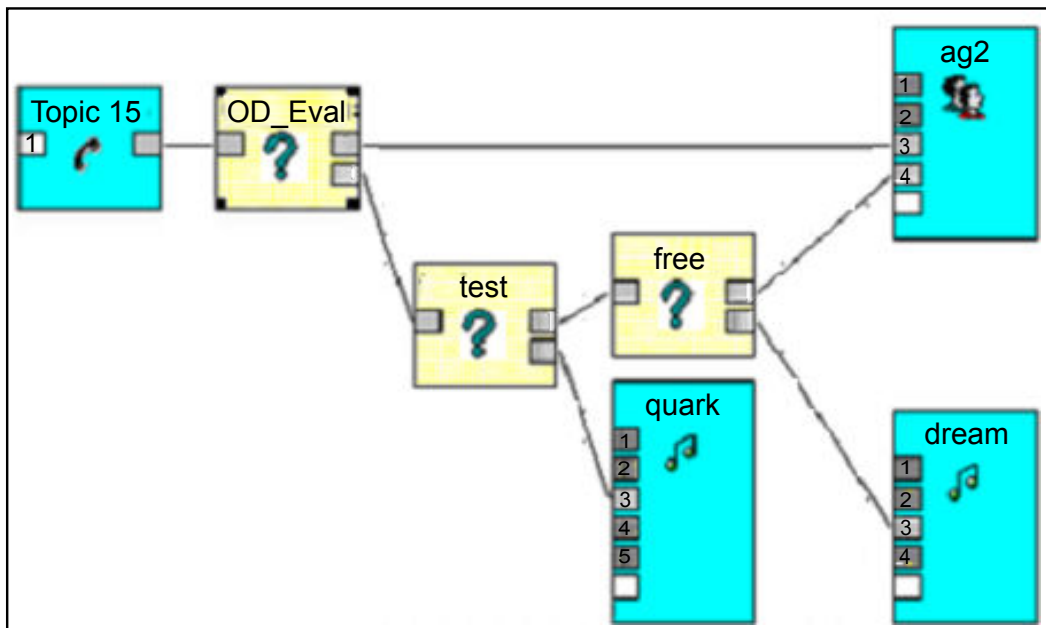
## Announcements to welcome the target subscriber

During the evaluation phase, the VECTORS process in the IP Office Contact Center server checks for the available agents in the agent group. This process initiates jobs based on the available agents and ensures that an agent group is available as the target in the task flow during the evaluation phase. You can use the *ODSI\_Evaluation* tag to configure this evaluation in a task flow. You can set this tag with a value 1 only during the evaluation phase. If no agent is available, the system plays an announcement to welcome the target subscriber.

You can create the following call flow in Task Flow Editor:

The logic contains the condition `c."ODSI_Evaluation"==1`. The system links the Yes-exit connector directly to the agent group. The No-exit connector processes the call after reaching the target subscriber.

The following image displays the call flow:



---

## Accelerated assignment

You can set a tag for a campaign to assign a target subscriber directly to an available agent. When the system establishes a connection with the target subscriber, the Kernel process selects the agent of the agent group that is available the longest and assigns the call directly to the agent.

### Related links

[Creating a tag in the Configuration module](#) on page 51

[Adding a tag in the Dialer module](#) on page 51

## Creating a tag in the Configuration module

### Procedure

1. On the **System** menu, click **Tag list**.  
The system displays the **Defined tags** dialog box.
2. Click **Add**.  
The system displays the **Tag Create** dialog box.
3. Do the following:
  - a. In the **Name** field, type `ODSI_No2ndRoute`.
  - b. In the **Type** field, click **User-defined**.
  - c. In the **Data type** field, click **Number**.
4. Click **OK**.  
The system lists the tag name in the **Defined tags** field.
5. Click **OK**.

### Related links

[Accelerated assignment](#) on page 51

## Adding a tag in the Dialer module

### Procedure

1. On the **Dialer** menu, click **Campaign**.  
The system displays the **Select Campaign** dialog box.
2. Select and double-click the campaign.  
The system displays the **Campaign [Edit]** dialog box.
3. In the **Tags** field, click **Create**.  
The system displays the **Select tag** dialog box.
4. From the tag list, select `ODSI_No2ndRoute` and click **OK**.  
The system displays the **Tag [Create]** dialog box.

5. In the **Value** field, type 1 and click **OK**.

The system displays the **Campaign [Edit]** dialog box.

6. Click **OK**.

#### Related links

[Accelerated assignment](#) on page 51

---

## Additional RPC qualification details

During the Right Party Contact (RPC) qualification by the agent, you can save more information in the Telephony module.

### Adding RPC qualification details to calls

#### Procedure

1. In the Configuration module, create a `TaskTag OD_QA xx`.

The `xx` variable can be a sequential number from 01 to 99. The system creates Tasktags `OD_QA01 - OD_QA05` and `OD_PERS_QR01 -OD_PERS_QR05` during the installation.

For example, create the `TaskTags OD_QA01` and `OD_QA02`. The system lists the configured Task Tags under “Net” in the Telephony module.

2. Create a `OD_PERS_QRxx TaskTag` for each `OD_QAxx TaskTag`.

### Configuring a campaign in the Dialer module

#### Procedure

1. To display the qualification TaskTags in a campaign, in the Dialer module, open the campaign.
2. In the Tags list, select the `OD_QAxx TaskTags tag`.  
For example, `OD_QA01` and `OD_QA02`.
3. In the **Value** field, enter the name that you want to display in the Telephony module.



**Campaign [Edit]**

Dialer

Name: Welcome1

Topic: Thema8

Active times:

Start date	Start time	Stop date	Stop ti...	Limits
11.09.2006	00:00	30.09.2007	00:00	1

Tags:

Name	Value
OD_QA01	not interested
OD_QA02	reclamation

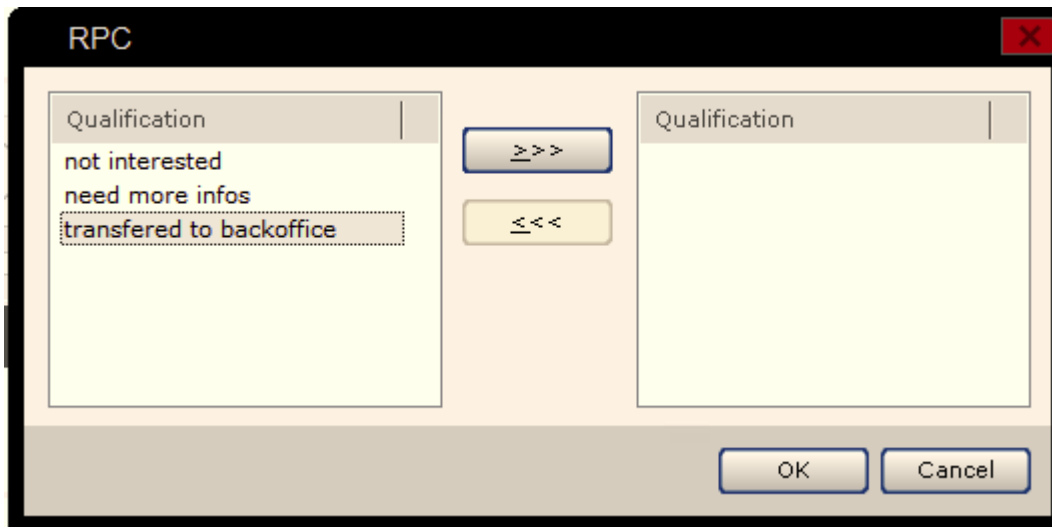
## Saving RPC qualification details

### About this task

When the agent receives a call for the configured campaign, the agent can select the TaskTags and a value.

### Procedure

1. In the contacts list, click **RPC**.  
The system displays the **RPC** dialog box.
2. Click a value.  
For example, click **not interested**.






The system saves only the specified TaskTag. For example, OD\_PERS\_QR01. The list of Tags also displays the selected qualification. In the example, the system sets the OD\_PERS\_QR01 tag after qualification because the agent selected the OD\_QA01 qualification not interested.

After qualifying, the system saves the call job together with the additional information.

**Call [Edit]**

Dialer

Name:  [Campaign] Welcome1  

Destination:

Number	Type	A...	Next attempt	State
80124100	<Default>		28.06.2007 16:29:24	Init

Active time periods:

Start date	Start time	Stop date	Stop time	Limits

Tags:

Name	Value
OD_PERS_Note	test note
OD_PERS_QR01	1
ODSI_OrigDialer	70b08b3a9e010000

Buttons: OK, Cancel, Create..., Delete, Up, Down, Create..., Delete, Create, Change..., Delete

# Glossary

**VEA**

VEA stands for Voice Extension Adapter.

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