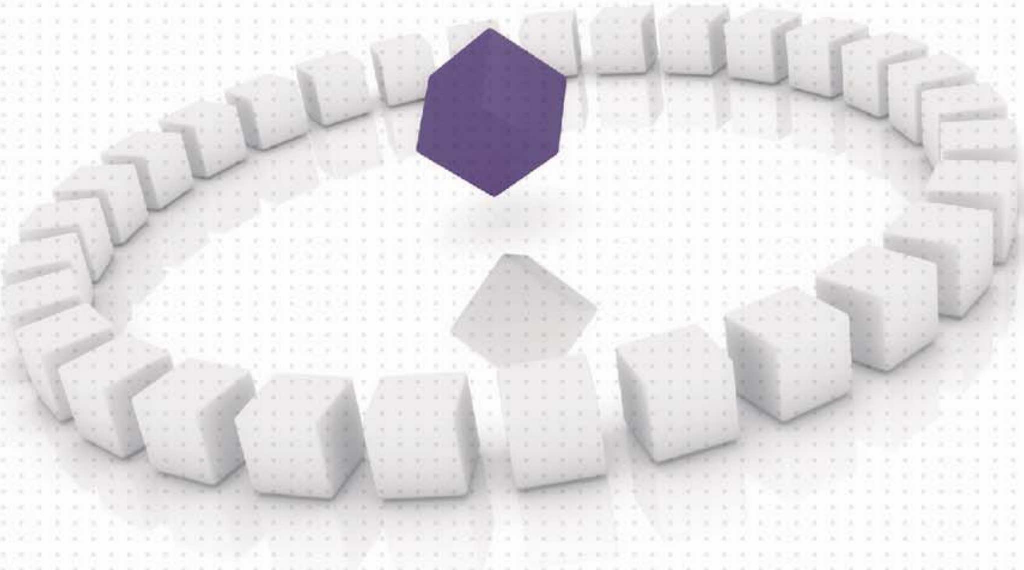


InConcert Allegro

Outbond Engine

Manual

inConcert
CONTACT CENTER TECHNOLOGY

Contents

Outbound Engine

The Outbound Engine service is in charge of establishing interactions with contacts.

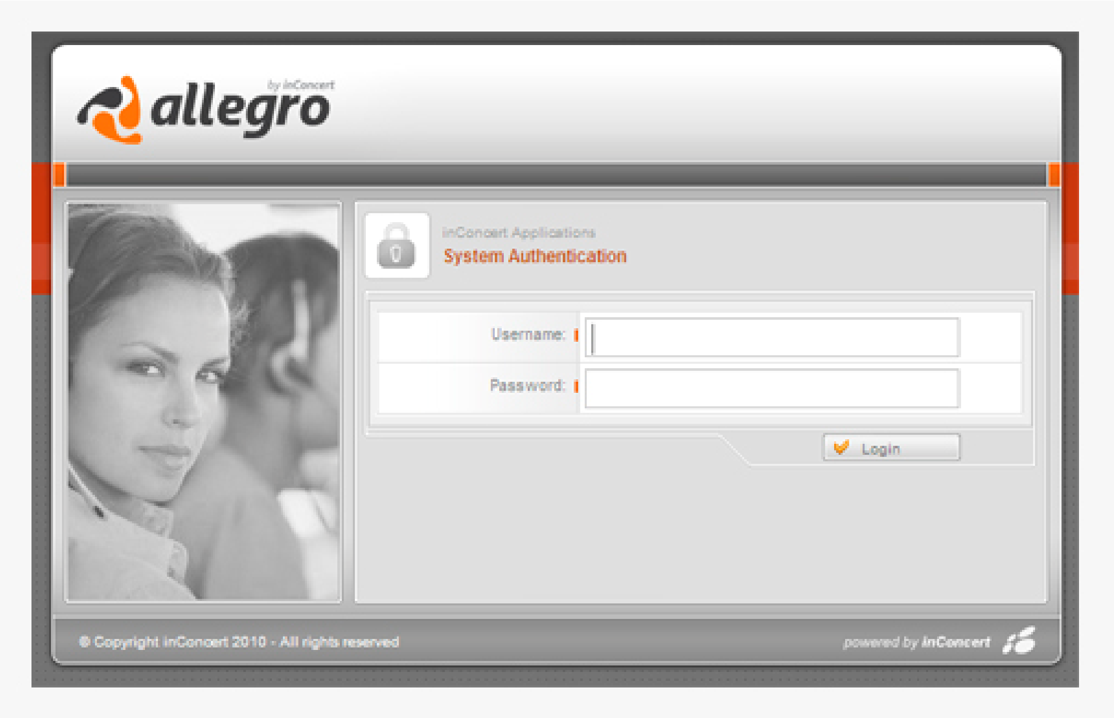
The administrator has the possibility of configuring contact batches for segmentation purposes. The service chooses the different contact batches following previously set specifications, and communicates with the contacts using a specified service.

Login

In order to login to the administrator's panel of the Virtual Contact Center, open a web browser and type the address of the VCC.

http://xxx.xxx.xxx.xx:8082/inconcert/apps/dashboard

Here, the Xs represent the IP of the InConcert WebHandler Server. The login screen will prompt the user to type a username and password.



The administrator will have to type the username, and specify the name of the VCC for which that username is operative.

For example, if my username is RDrecker and I need to edit a campaign for the HappinessConsultants VCC, then I need to type the following:

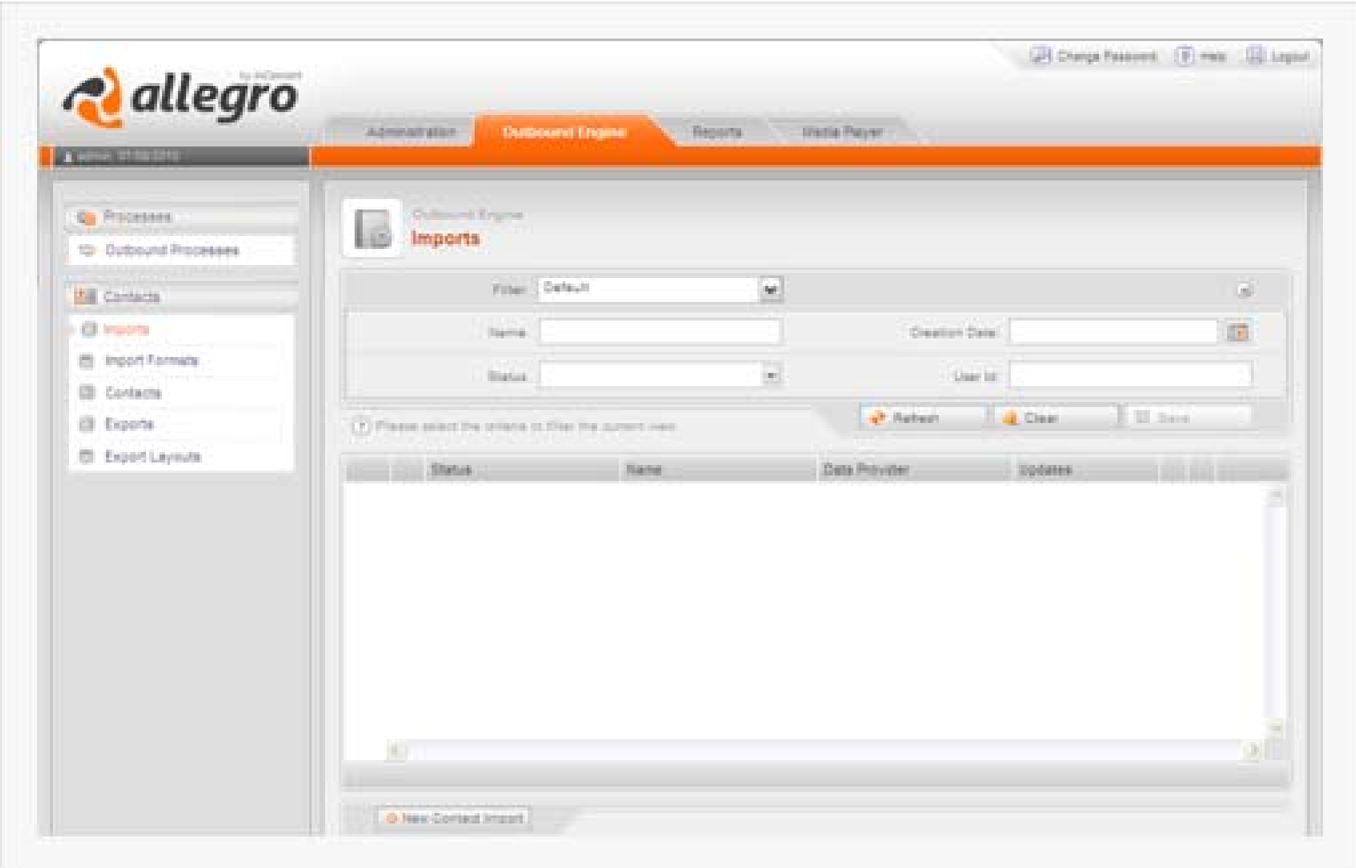
- **Username:** RDrecker@HappinessConsultants

Also, the fields in this screen are case sensitive, so remember to use Upper and Lower case if applicable.

Main View

The main view of the Outbound Engine tab in the dashboard has two sub menus:

- Processes
- Contacts

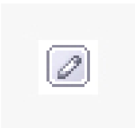


Filter

You can use this tool to define search parameters in order to identify the one or more previously set configurations for each menu.

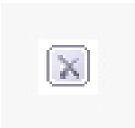
After introducing the desired values in each field, click on the “Refresh” button to retrieve the desired data.

The “Clear” button resets all fields, whereas the “Save” button saves the parameters of the search for future reference.



Edit

The edit button appears in all the menus, and can be used to edit the settings of each component.



Delete

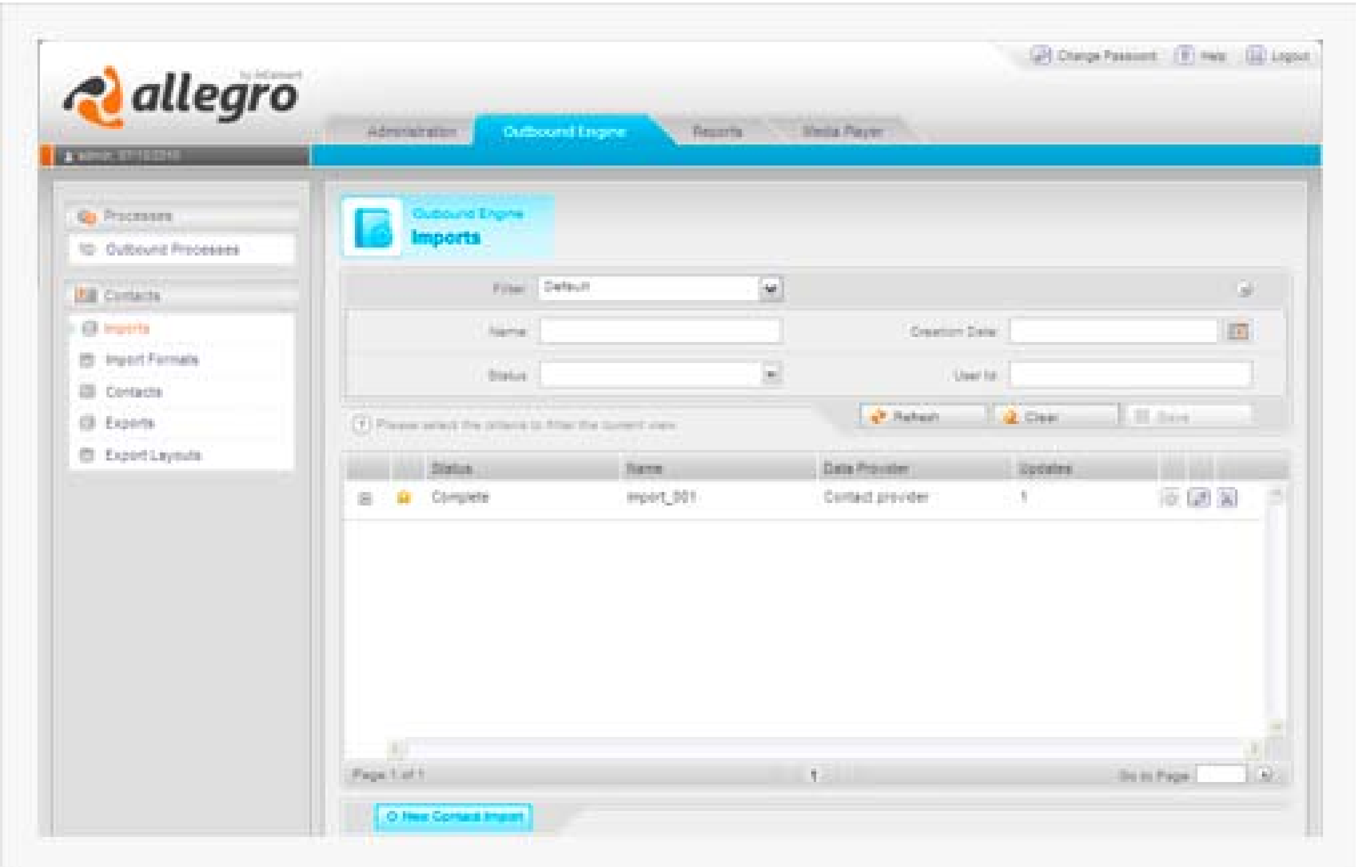
The delete button also appears in all the menus, and serves the purpose of deleting unwanted or misconfigured components.

Contacts Menu

The contacts menu is located below the Process Menu. In this menu the administrator will be able to see all the contacts and generate new entries for new contacts. This is the access point of all the contacts that are entering or leaving the system.

Given the importance of the method of importing contacts for the correct functioning of the generated processes, we will discuss this first.

Imports



This is the main screen in the Contacts menu. The different groups of contacts that were imported are listed in the “Imports” screen.

We will first discuss the procedure for new imports.

Importing new data

By clicking on the “New Contact Import” button, the administrator will be able to generate a new import process and add new contacts.

Generally, the databases of contacts contain several fields with different information. Here’s an example of a common database in Excel. It’s basically a list of contacts with details such as e-mail, full name, phone number, etc.

Email	FullName	Number	Address
kszk21@aol.com	SANDRA DOMIN	8156543545	2229 QUAIL RUN
william.lucas71@verizon.net	WILLIAM LUCAS III	5036669894	2225E188TH#104
tamekajones@alltel.net	TAMEKA JONES	2295679293	223 BARBER AVENUE
hilary4@gmail.com	HILARY HEYS	6177433817	223 CLOST AVENUE
allamericanjedi@yahoo.com	MARCUS ALMARAZ	2103425990	223 ENGLEWOOD
wat@hotmail.com	ME EAA	3043322323	223 JONES
airmatt24ky@yahoo.com	MATTHEW ALLEN	8593601547	223 MAIN ST.
vampirebabe4hell@gmail.com	NATALIE BRUNEAU	7189410540	223 MARTENSE STREET
testimoniedivine@yahoo.com	TESTIMONIE TATE	3138658309	223 PILGRIM
lnn24@sbcglobal.net	NORA SUAREZ	9565441271	223 PINK ROSE ST.
freddieacleon@aol.com	FREDDIE LEON	5208692831	223 S KOLB RD
bonilla.f@sbcglobal.net	ROSA VILLATORO	2133680236	223 S. CATALINA ST. APT.2
tyler_finest-07@yahoo.com	KIMBERLY YOUNG	9033723827	223 S. THOMPSONAVE.#5
gmoyer@csinet.net	GAY MOYER	2198790711	223 S. WOODLAND AVE
kogathewolfe@yahoo.com	CHARLES LEE	4102381087	223 SOUTH MARLYN AVENUE

In order to import a database of contacts however, we need to have the data stored in a CSV document.

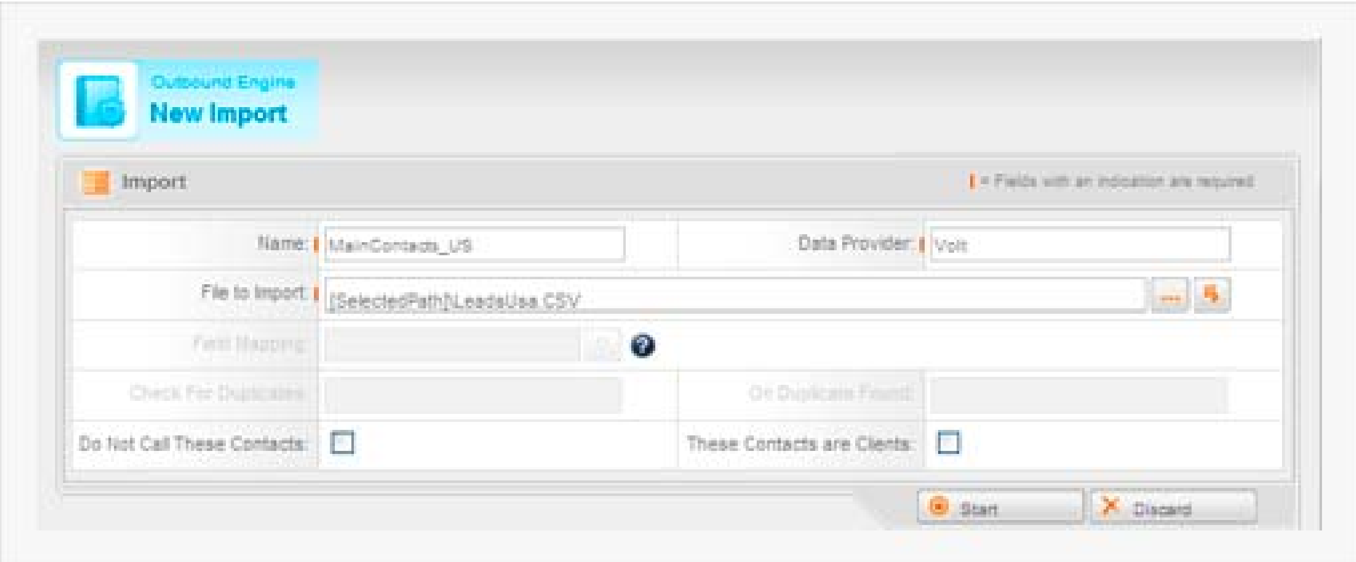
A CSV document is a Comma Separated Values document that separates each field with a comma[1].

[1] If the document uses a semicolon instead of a comma to separate the values, the InConcert software recognizes it and proceeds with the import

```
Email,FullName,Number,Address,City,State,Zip
kszk21@aol.com,SANDRA DOMIN,8156543545,2229 QUAIL RUN,ROCKFORD,IL,61103
william.lucas71@verizon.net,WILLIAM LUCAS III,5036669894,2225E188TH#104,PORTLAND,OR,97233
tamekajones@alltel.net,TAMEKA JONES,2295679293,223 BARBER AVENUE,ASHBURN,GA,31714
hilary4@gmail.com,HILARY HEYS,6177433817,223 CLOST AVENUE,BOSTON,MA,2109
allamericanjedi@yahoo.com,MARCUS ALMARAZ,2103425990,223 ENGLEWOOD,SAN ANTONIO,TX,78213
wat@hotmail.com,ME EAA,3043322323,223 JONES,MORGANTOWN,WV,26505
airmatt24ky@yahoo.com,MATTHEW ALLEN,8593601547,223 MAIN ST.,NEWPORT,KY,41071
vampirebabe4hell@gmail.com,NATALIE BRUNEAU,7189410540,223 MARTENSE STREET,BROOKLYN,NY,11226
testimoniedivine@yahoo.com,TESTIMONIE TATE,3138658309,223 PILGRIM,HIGHLAND PARK,MI,46203
lnn24@sbcglobal.net,NORA SUAREZ,9565441271,223 PINK ROSE ST.,BROWNSVILLE,TX,78520
freddieasleon@aol.com,FREDDIE LEON,5208692831,223 S KOLB RD,TUCSON,AZ,85710
bonilla.f@sbcglobal.net,ROSA VILLATORO,2133680236,223 S. CATALINA ST. APT.2,LOS ANGELES,CA,90004
tyler_finest-07@yahoo.com,KIMBERLY YOUNG,9033723827,223 S. THOMPSONAVE.#5,TYLER,TX,75702
gmoyer@csinet.net,GAY MOYER,2198790711,223 S. WOODLAND AVE,MICHIGAN CITY,IN,46360
kogathewolfe@yahoo.com,CHARLES LEE,4102381087,223 SOUTH MARLYN AVENUE,ESSEX,MD,21221
beatricelyles@juno.com,BEATRICE LYLES,8642055543,223 SPIRIT,ROEBUCK,SC,29376
```

This is a view of the same data as above, but in a CSV format.

Once we have the data in a CSV document, we can start the import process.

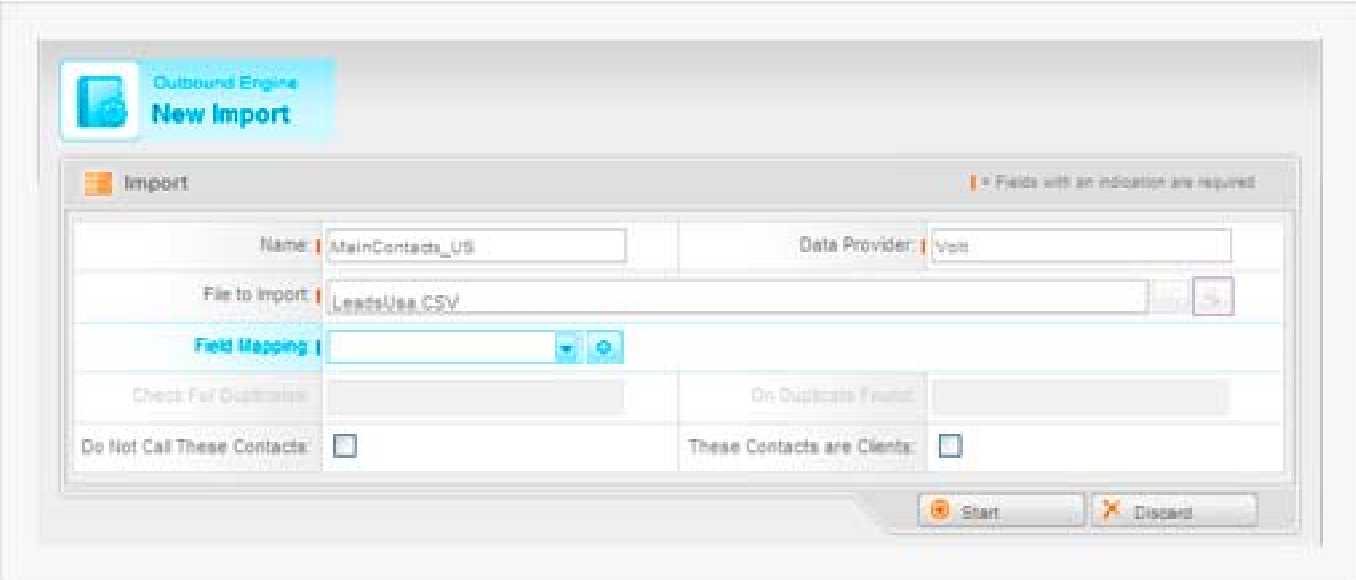


In this screen the administrator needs to fill the fields with names and data.

- **Name**: is the name that will identify the import from other imports done in another moment
- **Data provider**: the name of the company or person who provides the data.
- **File to import**: by clicking on the "..." button the administrator will be able to browse through files in the computer, and choose the right CSV file for the import. The button uploads the file to the

system. After the file has been uploaded, the server already has access to it, however, before any interactions can be made, the administrator needs to complete a series of steps.

Once uploaded, the administrator needs to map the different fields in the database.



In the field mapping box, the administrator will choose a format to identify the data in the CSV file. The format basically "tells" the system which field contains what information.

It's important to point out that there may be different formats already saved in the system. The administrator can choose one of the existing formats or create a new one, fitting the new database.

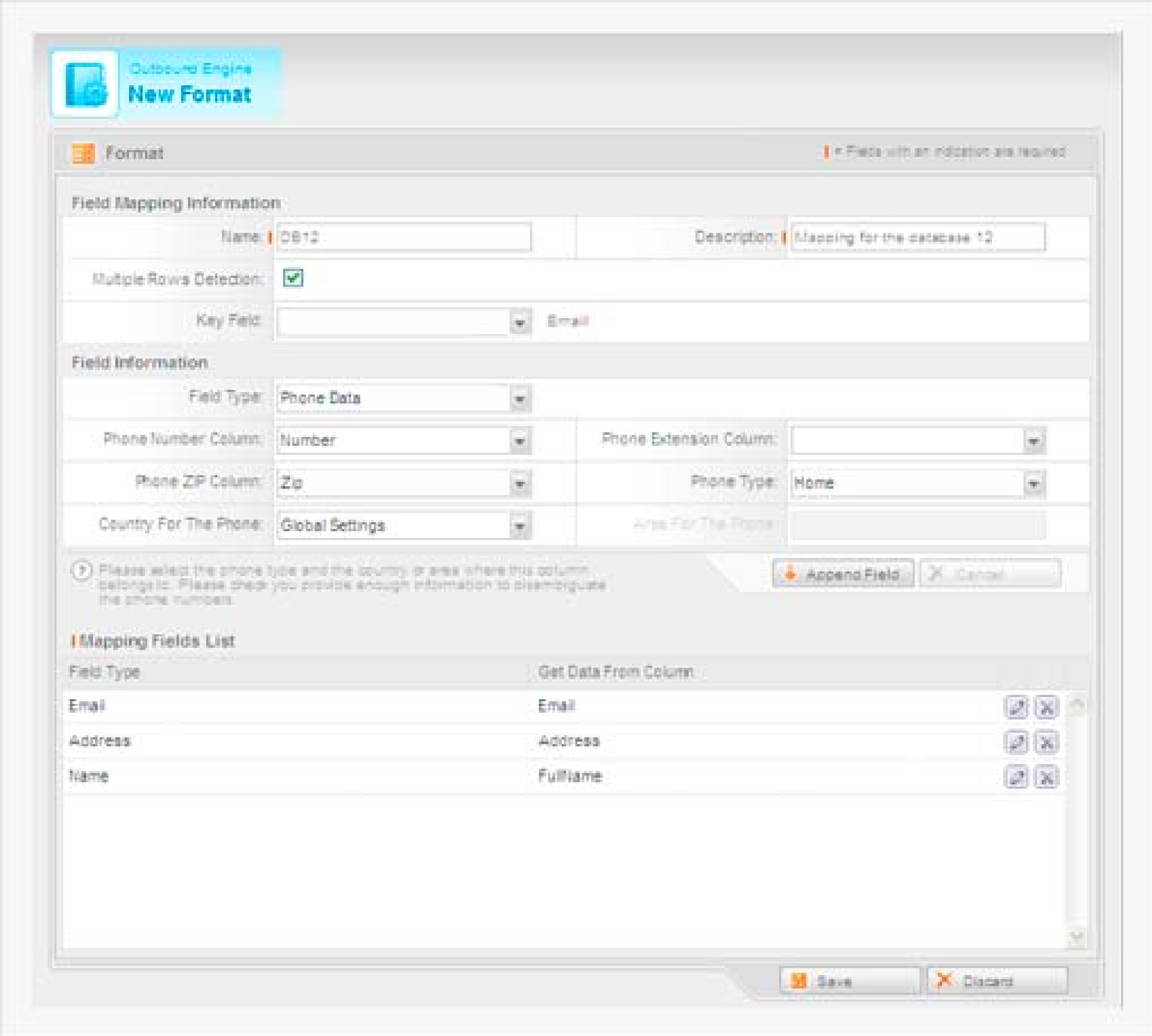
We will now proceed to create a new field mapping by clicking on the "+" button.

This will take the administrator to the field mapping screen.

Field Mapping

Field mapping is used to tell the system which fields contains which information, and also to select which are the relevant fields for the interactions.

Here's an example of the field mapping screen. Note that the title screen says "New Format". This is due to the fact that a format is a cluster of mapped fields. Although the mapping is done field by field, the end result is a format.



The first section of the field mapping screen contains the fields that will identify the import format from other formats. This is important, since the mapping format can be reused on other imports as long as they have the same field structure.

- **Name**: the name that will identify this import format
- **Description**: brief account of the mapping format being created
- **Multiple row detection**: if checked, the system will spot different rows of data belonging to the same contact. For example if we have two rows with the same key field and different phone numbers, the system will recognize that those phone numbers belong to the same contact.
- **Key Field**: is the field that identifies the contact, and differentiates it from other contacts. This field is used for the multiple row detection.

Field Information

After this is done, we need to identify the different field types the system will use, with the fields in our database.

To do this we need to select the different field types in the "Field Type" list (one by one) and match it with the corresponding column in the CSV file.

There are several kinds of Field Types. We will explain in detail each one of them.

Account Group

The account group is the name or number of the client's account; for example, if there's a group of agents who work with a particular product, they will be grouped in an Account Group.

Account Officer

It's the name of the account liaison for the client in the firm.

Address

This field type indicates the contact's address. The administrator needs to point out in which column the information is, as well as the nature of the location, whether it's a home address or a work address.

There's also the need to indicate the country and the area code or zip code for the address.

Campaign

Indicates if the contact is associated to a given campaign, and this is indicated in the CSV file.

Category

If the contacts are divided into different categories, for example Bi-lingual and Non Bi-lingual, the administrator can indicate it by appending a category field.

Email

Indicates a field that contains an e-mail address. The address can be either personal or work related.

Identifier

A field that will identify each contact, it can be an ID, social security number, an alphanumeric combination, etc.

If the CSV file does not have an ID field, the system will generate one automatically. Therefore, there is no need for the CSV files to contain an ID field.

Name

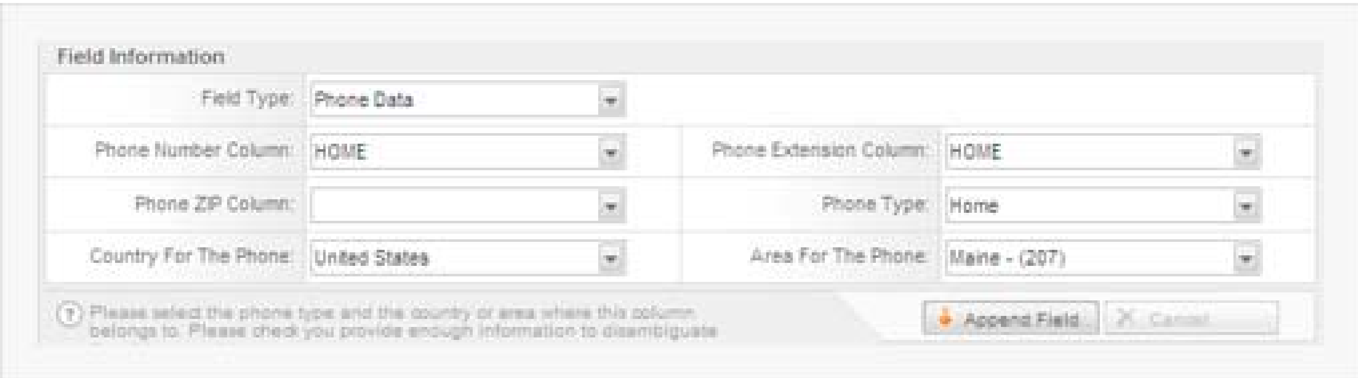
Indicates the name of the contact. This data will appear in the agent's screen when the call is transferred to him.

Name-Value

In this case the field can contain either a name or the value of any variable needed. These fields are not predefined by the system, and the administrator can generate as many Name-Value fields as he needs. Examples of Name-Value fields are: Age, Neighborhood, etc.

In the example above, we've created a data field that indicates the number of online purchases in the last 30 days.

Phone Data



Here the administrator will indicate the different phone types and their respective columns. The administrator has to append the all the necessary phone numbers separately.

The Phone Data fields indicate the system the destination for the phone call, with the country code and area code.

Let's illustrate the point with some examples.

Example A: The data defined in the CSV document only has the contact phone number and not the country or area code.

Louis Phillippe--- 3365429

The person in question lives in Uruguay, therefore the administrator will have to select the area code for the city the contact lives in, and will also have to select Uruguay in the Country field (so that the system dials the proper country code).

Example B: The data defined in the CSV document contains the phone number plus the area code.

Louis Phillippe--- 02-3365429

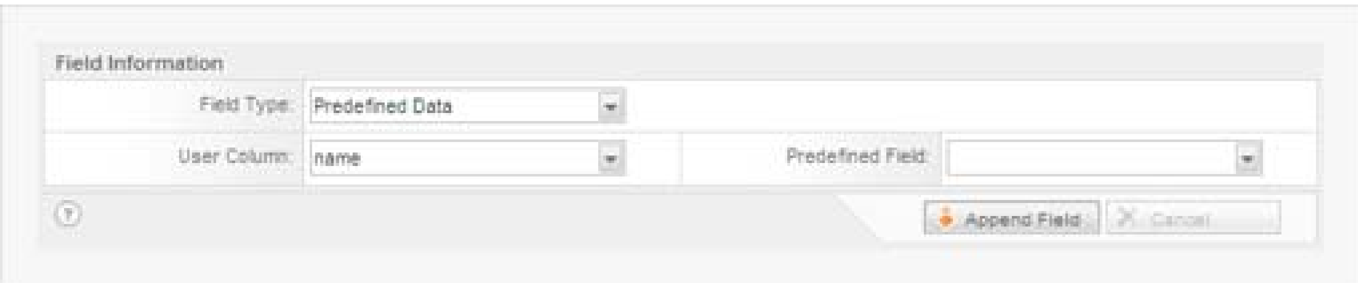
In this case the system recognizes the area code, so the administrator doesn't need to specify the area in the phone number configuration. He does, however, need to specify the country.

Example C: The data defined in the CSV document already has both the country code and the area code.

Louis Phillippe---+59823365429

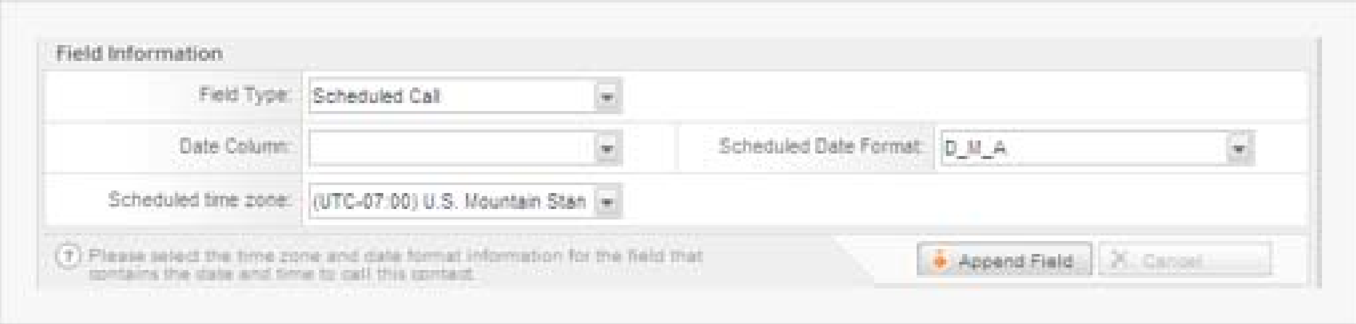
In this case, the administrator doesn't need to configure neither the country nor the area code. The system will recognize to which country it's making the call if the administrator sets the option "Global Settings" as the Country Code field.

Predefined Data

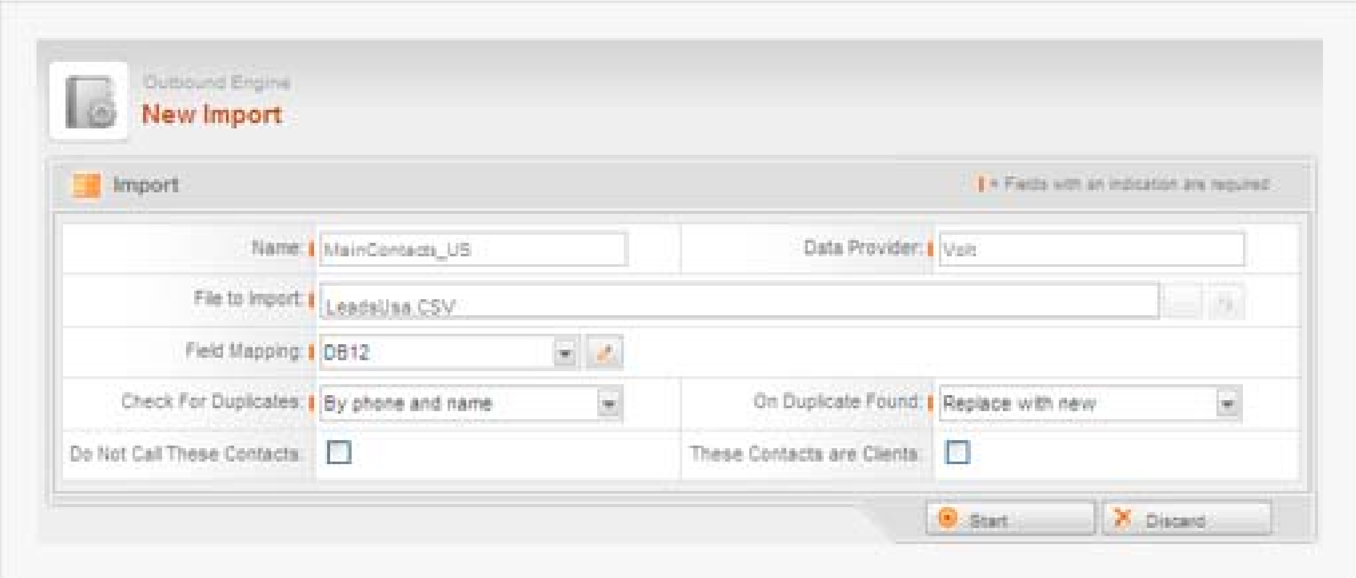


These fields are fields that need previous configuration, and that cannot be configured in this stage.

Scheduled Calls



In this case the field type “Scheduled Call” refers to a date for calling the contact present in the CSV file. The administrator can choose the “Scheduled Date Format” and the time zone for the scheduled call.



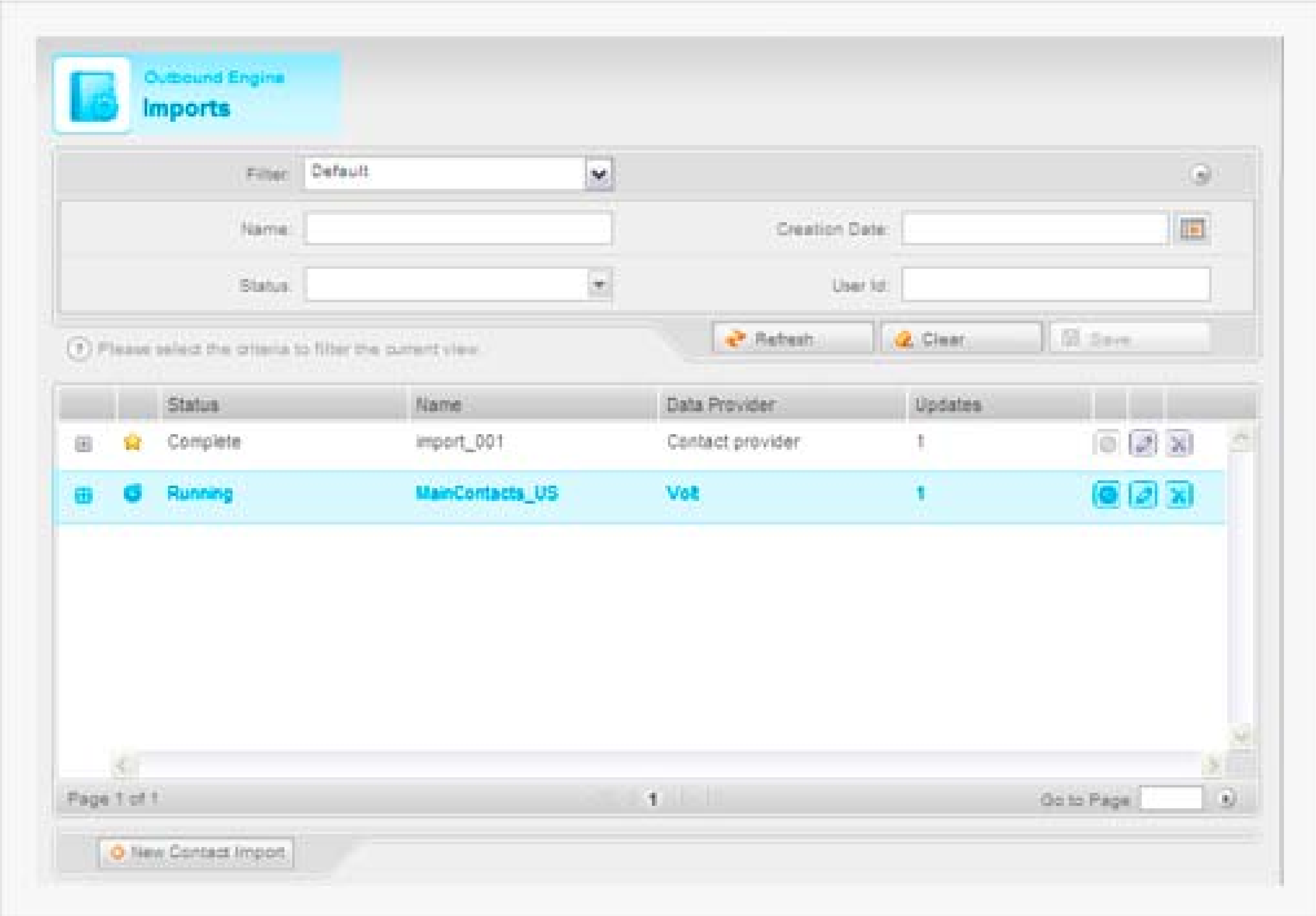
The system will bring us back to the “New Import” screen, where we can select more options for the data.

- **Check for Duplicates**: In this case, the system will check if the imported CSV file has contact entries that were already present in the database through previous imports. The administrator can select three options
  - None: Will not check for duplicates
  - By Contact Phone: will check for duplicates in the Phone Field
  - By Phone and Name: will consider a duplicate entry if and only if the fields of Name and Phone number are identical.
- **Action on duplicate found**:
  - Replace with new: replaces the old entry with the data of the new import
  - Keep Current contact: maintains the old entry with the data from previous imports
  - Append new to current: when the system finds two contacts with the same ID, it keeps the current data as the main entry, and adds the information of the new import (without deleting any repeated information).
  - Append current to new: when the system finds two contacts with the same ID, it keeps the new data as the main entry, and adds the information of previous imports (without deleting any repeated information).

- **Do not call these contacts**: if checked, the system will add the selected group of contacts to the DNC list, thus making them VIP contacts (the system will not contact them without a previous business relationship). Regulations regarding DNC lists varies from country to country.
- **These contacts are clients**: if checked this means the contacts are already clients of the firm. In this case, if the contact is in a DNC list, the firm can call him anyway for telemarketing campaigns.

Start import

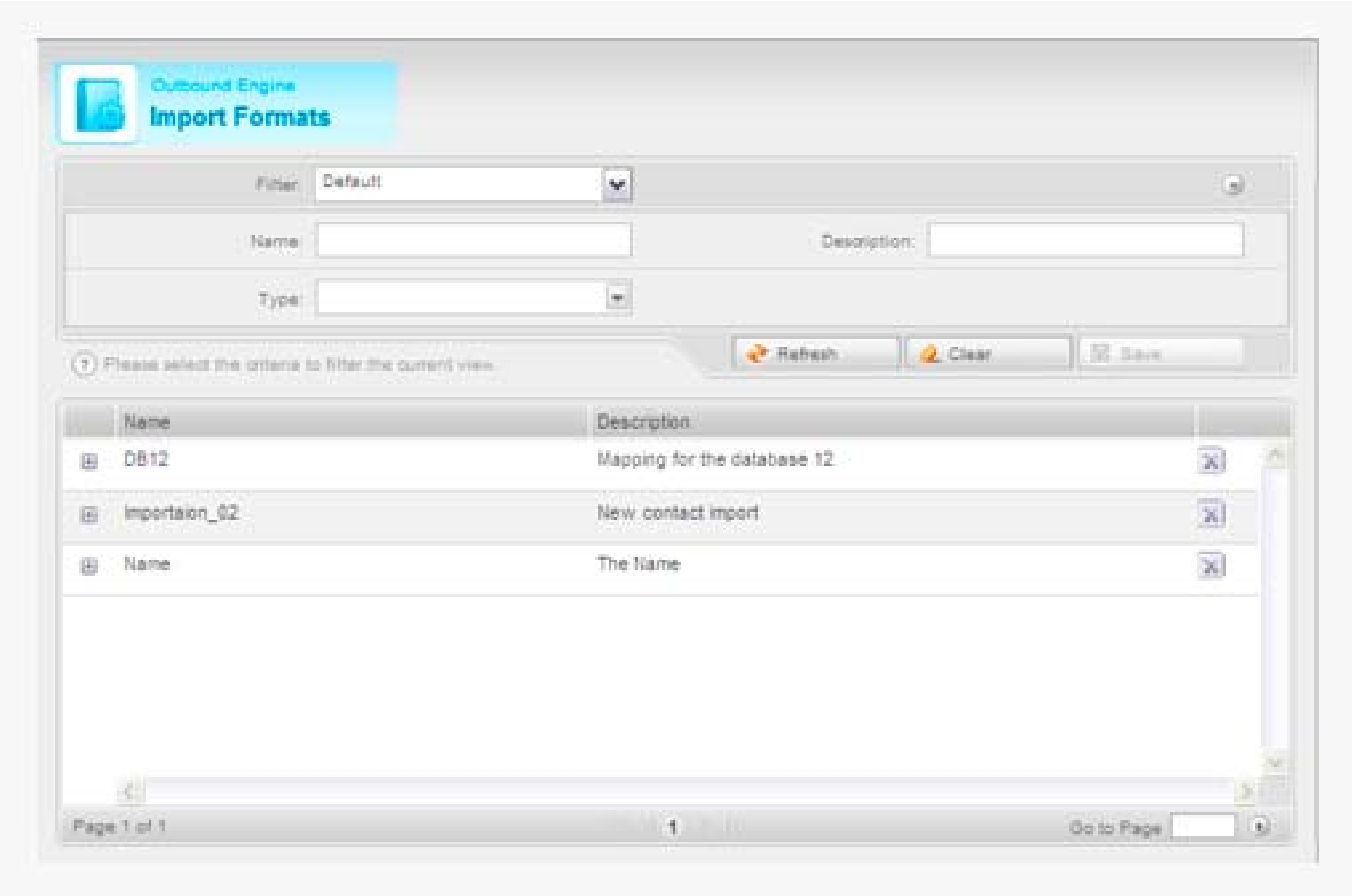
Once all is established, click on the “Start” button to start importing the contacts.



Once the import process has started, the system will take us to the Imports screen. Here we can see the status of the import process: Stopped, Running or Complete.

Import Formats

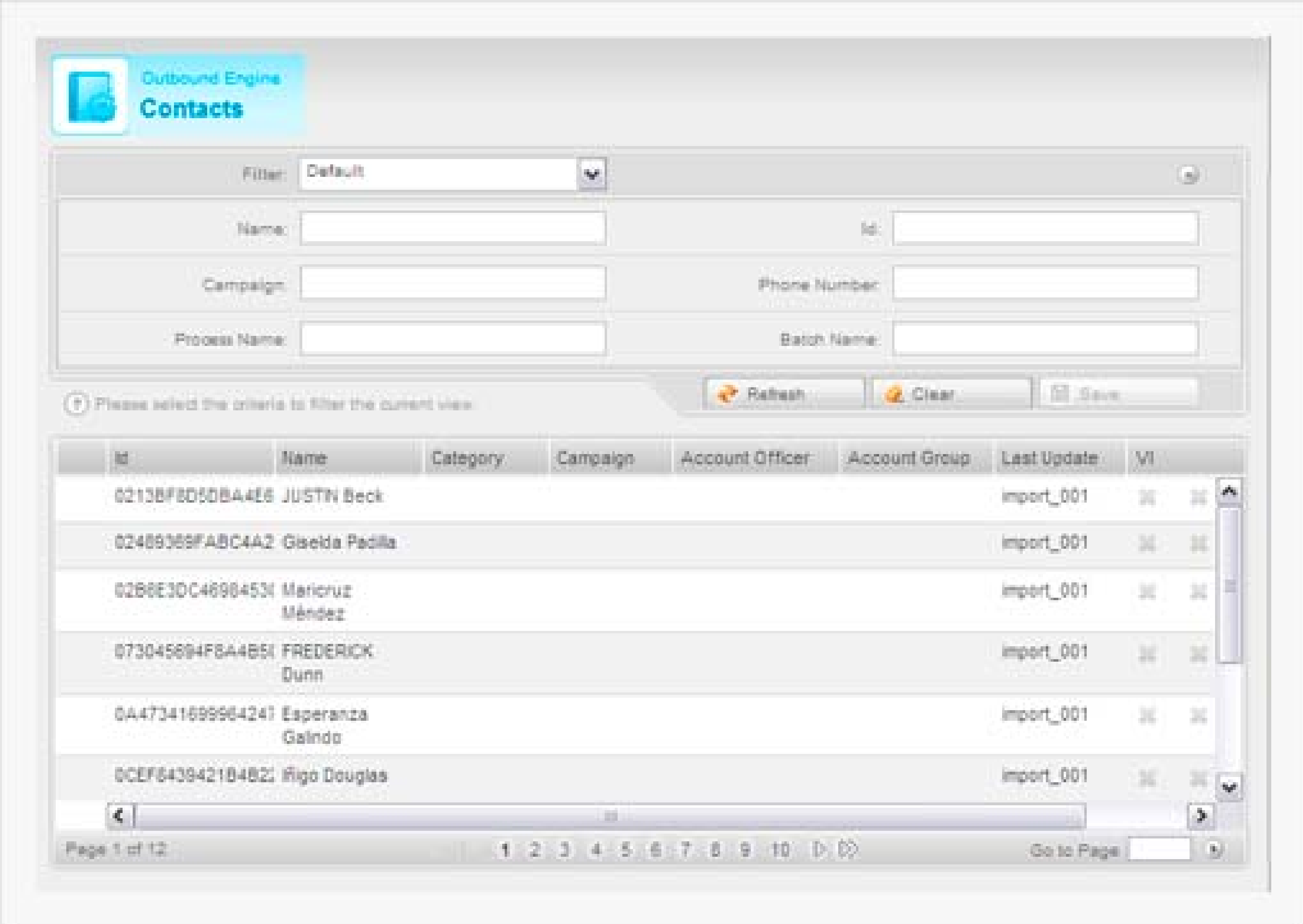
In the import formats screen, the administrator can see the different field mapping configurations that have been created for outbound campaigns.



This is merely a list of all the mapping formats that have been executed. The administrator can eliminate the formats or get details of the mapped fields by clicking on the "+" button to the left of the names.

Contacts

Provides a list of all the contacts retrieved in the different import processes.



In this case, the administrator can check information contact by contact, find a particular contact and edit the information.

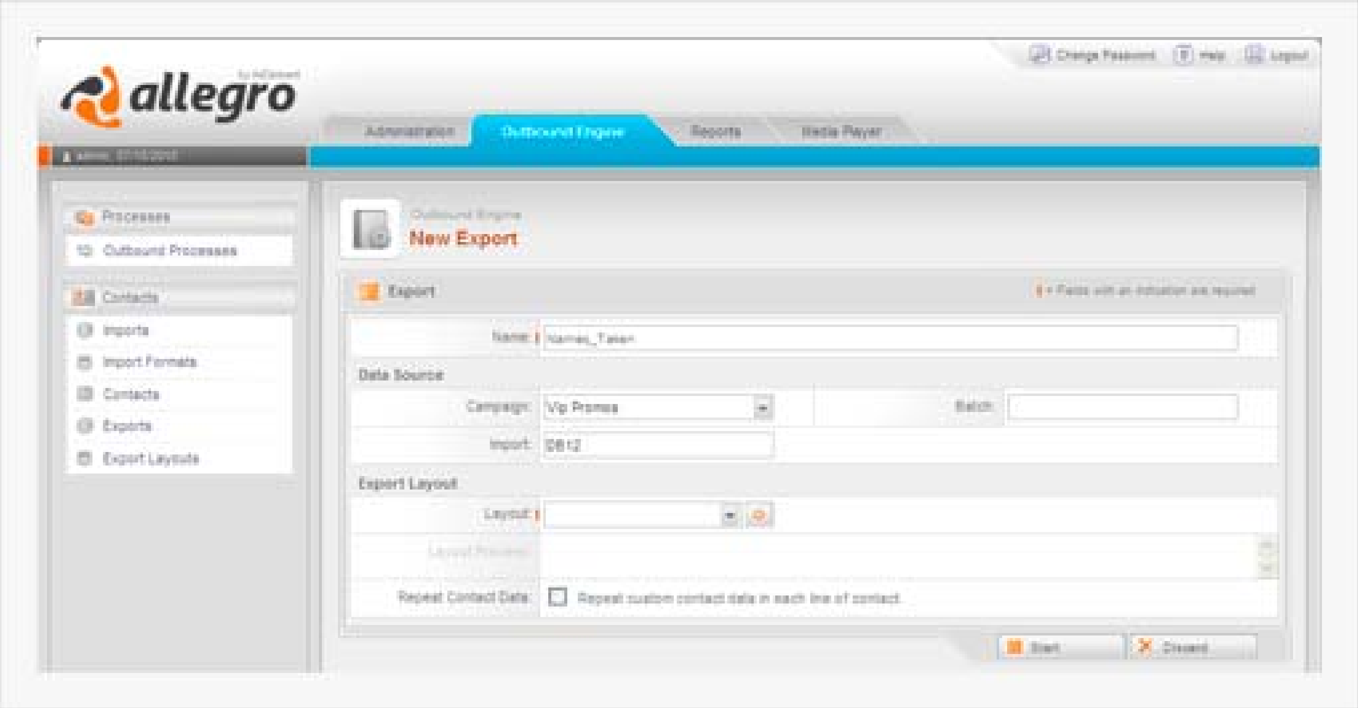
Exports

An export is a set of fields and values the system makes available for further analysis. The system will export a CSV file with a set of fields specified by the administrator.

We will now analyze the different available options for an export.

By clicking on the “New export” button, the system will get a screen where the administrator can specify the different fields for the export.

New Export



The new export screen has different fields for the administrator to define.

- **Name**: indicates the name of the exported data

Data source

These fields are OPTIONAL. If the administrator does not specify anything, the system will import all the contacts without filtering.

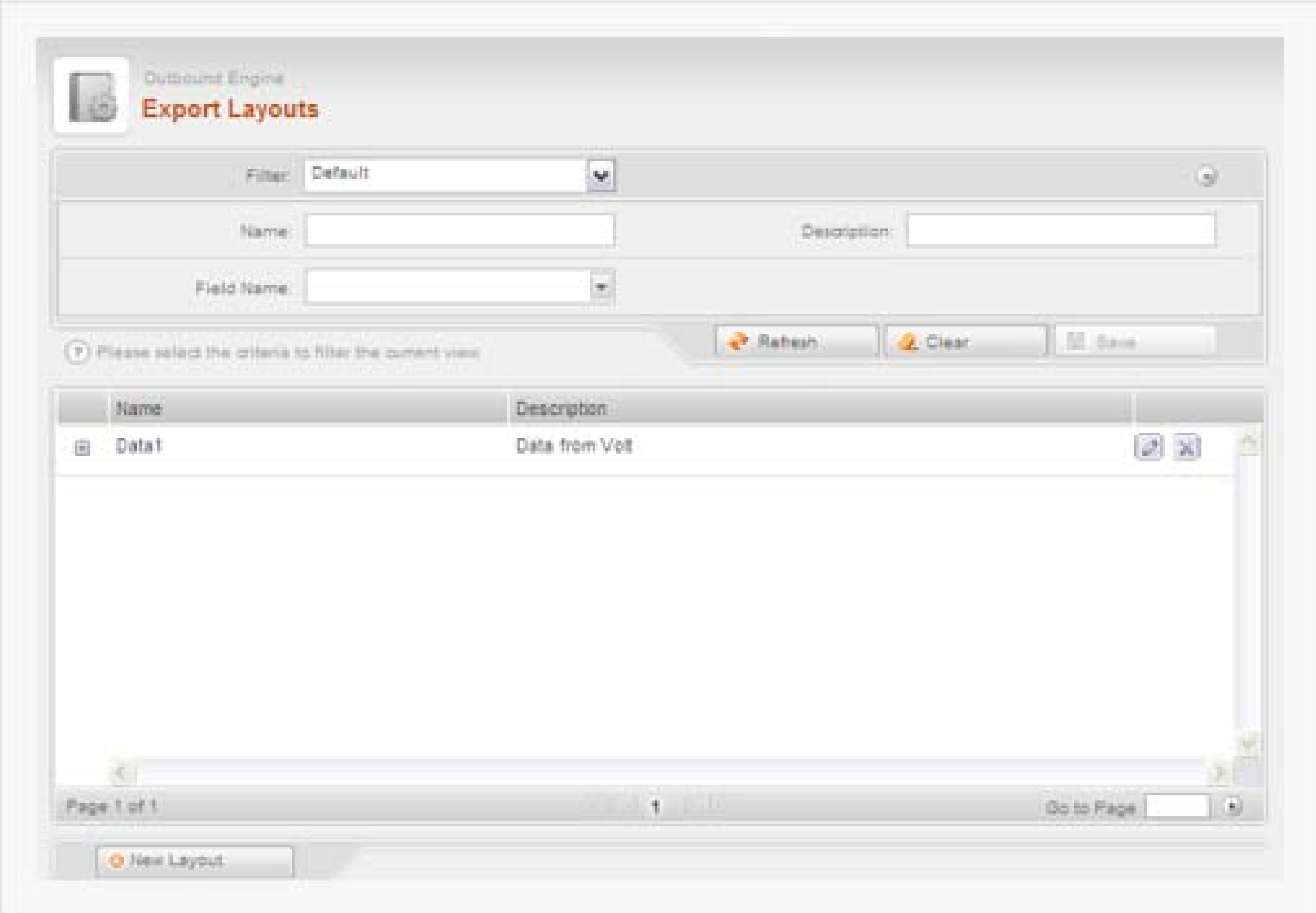
- **Campaign**: indicates to which campaign the we are getting is related belong (they were contacted in that campaign)
- **Batch**: indicates the name of the contact batch that was contacted
- **Import**: indicates the import name of the contacts I will export (only those of the import I am referring to)

The export layout is basically the arrangement of columns in the CSV exported document. Namely, what goes into which column.

The administrator has to choose a layout from the list, or create one from scratch. To do this, he will have to click on the “+” button.

For an explanation on how to create a new layout, please see page X.

Export Layouts



In the export layouts screen we can see a list of all the saved layouts used to export data from the outbound engine.

The administrator can edit or delete the different layouts.

Creating a new Layout

To create a new layout we need to specify the different fields we want in the exported document.

The layout configuring process is divided in several blocks. Each block will offer you different information to add to your export file. The blocks are separated by “Theme”.

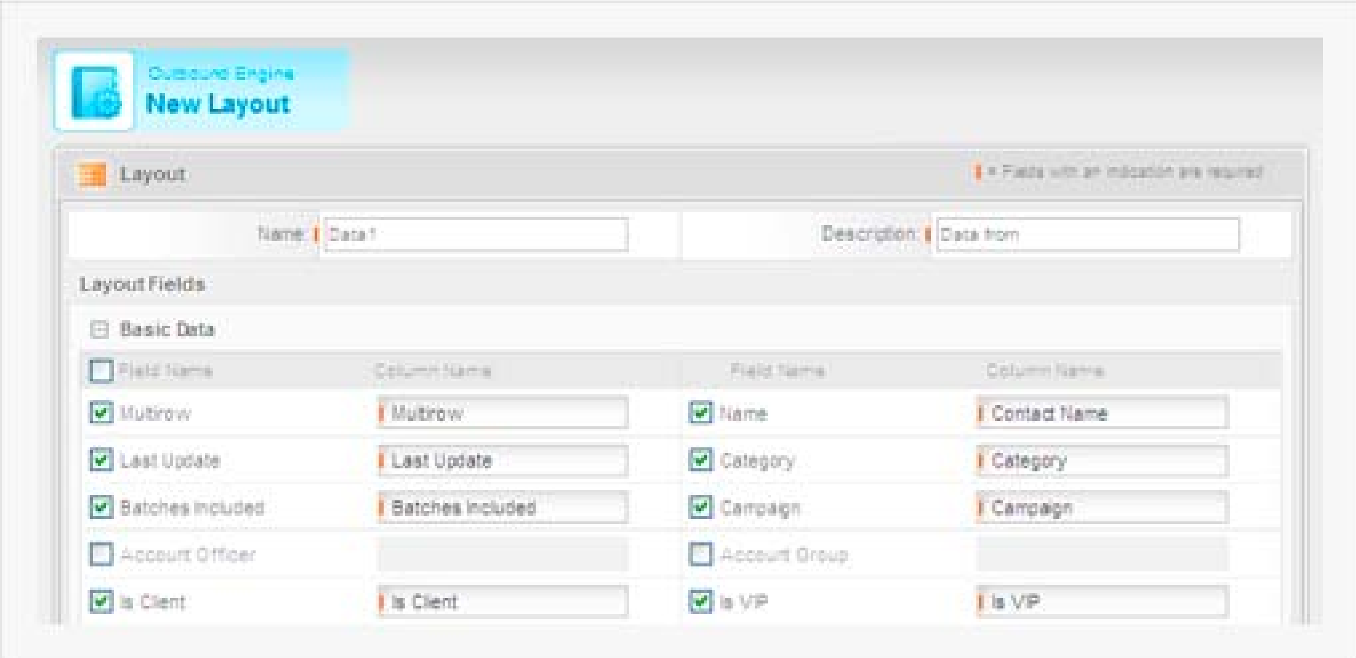
Depending on the information needed, the administrator can choose the different variables from the system.

Each new layout needs:

- **Name**: identifies the layout from other layouts
- **Description**: brief description of the data included

Basic Data

This block is used when we want to export some of the basic information on a contact.



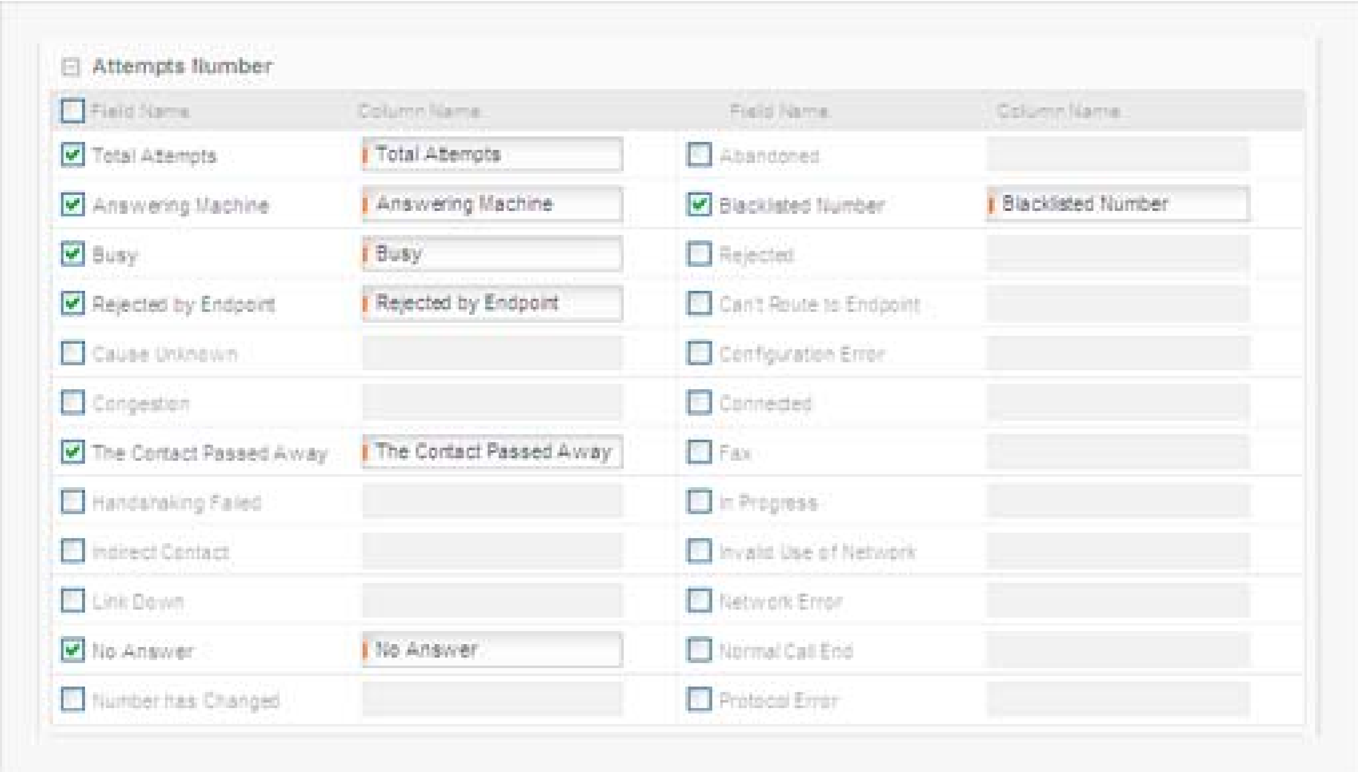
In this block the administrator can choose different fields of basic data to be included in the exported CSV. By checking the different checkboxes, the data will appear in the CSV.

- **Multirow**
- **Name**: contact name
- **Last update**: date of the last update for each contact
- **Category**: if the contacts are divided into different categories, this column will show to which column each contact pertains
- **Batches included**: names of the batches included in the export file
- **Campaign**: names of the different campaigns the contacts belongs to
- **Account Officer**: It's the name of the account liaison for the client in the firm.
- **Account Group**: The account group is the name or number of the client's account; for example, if there's a group of agents who work with a particular product, they will be grouped in an Account Group

- **Is Client**: if the contact is a client it will be indicated in this column of the CSV document
- **Is VIP**: indicates whether the contact belongs to the VIP group

Attempts number

This block exports the total attempts numbers, breaking them into different categories.



In this block the administrator can choose to visualize information on interactions with contacts, namely the number of communication attempts with each contact. The fields are:

- **Total attempts**: number of attempts to reach a contact
- **Abandoned**: number of abandoned calls for the contact
- **Answering machine**: number of times the system tried to reach the contact and got an answering machine answer
- **Blacklisted number**: the number is in a blacklist (DNC list)
- **Busy**: number of times the system tried to reach the contact and faced a busy line
- **Rejected**: number of times the system tried to reach the contact but was rejected
- **Rejected by endpoint**: number of times the system tried to reach the contact but was rejected by the telephone endpoint

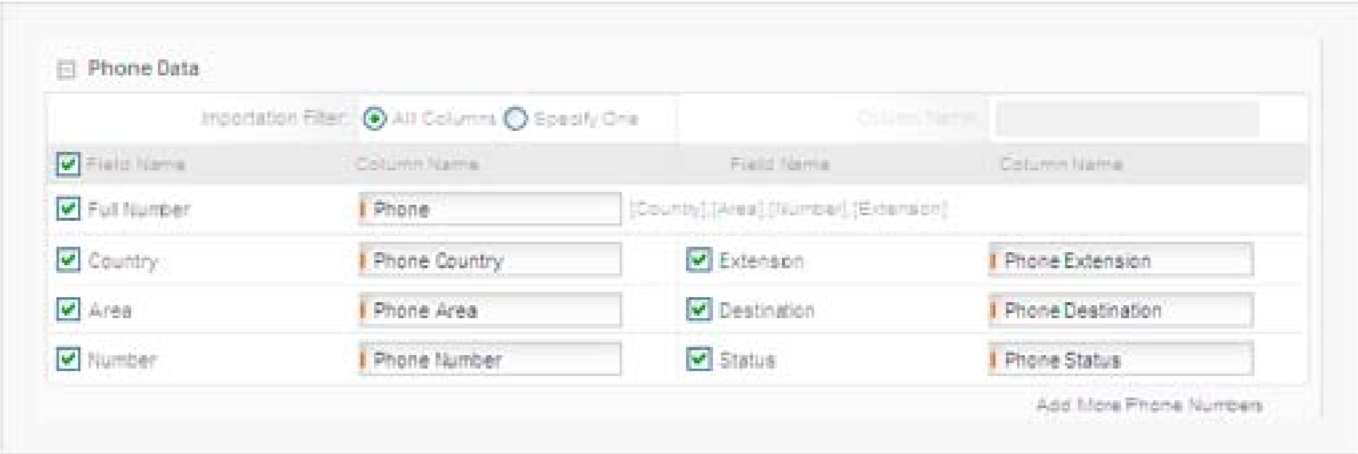
- **Can't route to endpoint**: number of times the system tried to reach a contact and could not route the call to its destination
- **Cause Unknown**: number of times the system cannot connect with the contact for an unfamiliar reason
- **Connection**: number of times the system called the contact and the contact answered
- **Congested**: number of times the system tried to reach the contact and got a busy line
- **The contact passed away**: the contact died
- **Fax**: when the system reached the contact fax tone was activated
- **Handshaking failed**: number of times the system had an error because it couldn't negotiate the call with the telephony carrier
- **In Progress**: number of times the result of the call was "In progress" (dialing)
- **Indirect Contact**: number of times the system called the contact and got someone else on the phone
- **Invalid use of network**: number of times the system tried to contact the telephone network and got "Error"
- **Link down**: number of times the system tried to reach the contact and the trunk was down
- **Network error**: number of times the system tried to contact the telephone network and got "Error"
- **No answer**: when the system tried to reach the contact the pre-established time for answering elapsed with no answer
- **Normal call ended**: the call ended in a regular way
- **Number has changed**: the number for the contact the system is trying to reach changed.
- **Protocol error**: number of times the system tried to reach the contact and got a telephony protocol error

Custom Fields

Here the administrator introduces the names of the personalized fields.

Phone Data

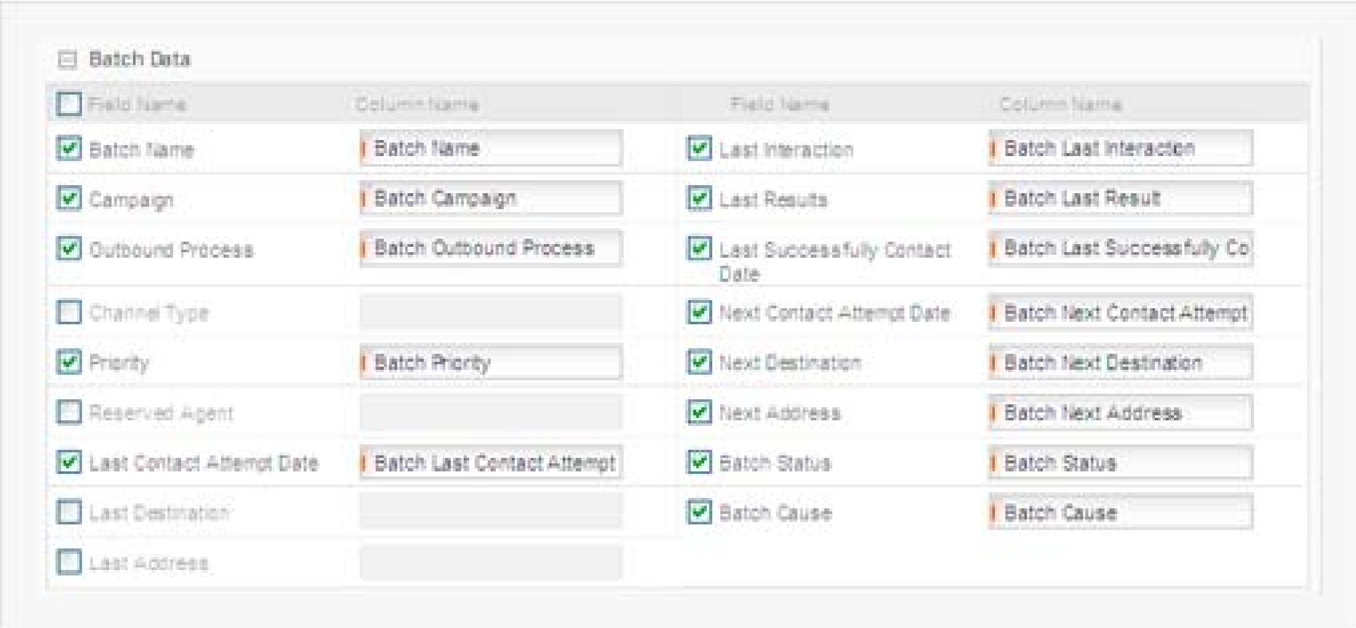
This block exports the different phone numbers for each contact.



- **Full Number**: states the complete phone number for the contact, with the country, area, number and extension
- **Country**: country code for phone numbers
- **Area**: area code for phone numbers
- **Number**: the phone number itself
- **Extension**: if applies, the extension number for the phone
- **Destination**: indicates the type of phone, example: home phone, office phone.
- **Status**: indicates whether the phone is enabled or disabled

Batch Data

This block will be used when we need to export contact data relative to a given contact batch. It will contain the data on the calls for every contact in the batch; the time of the call, the result, etc.

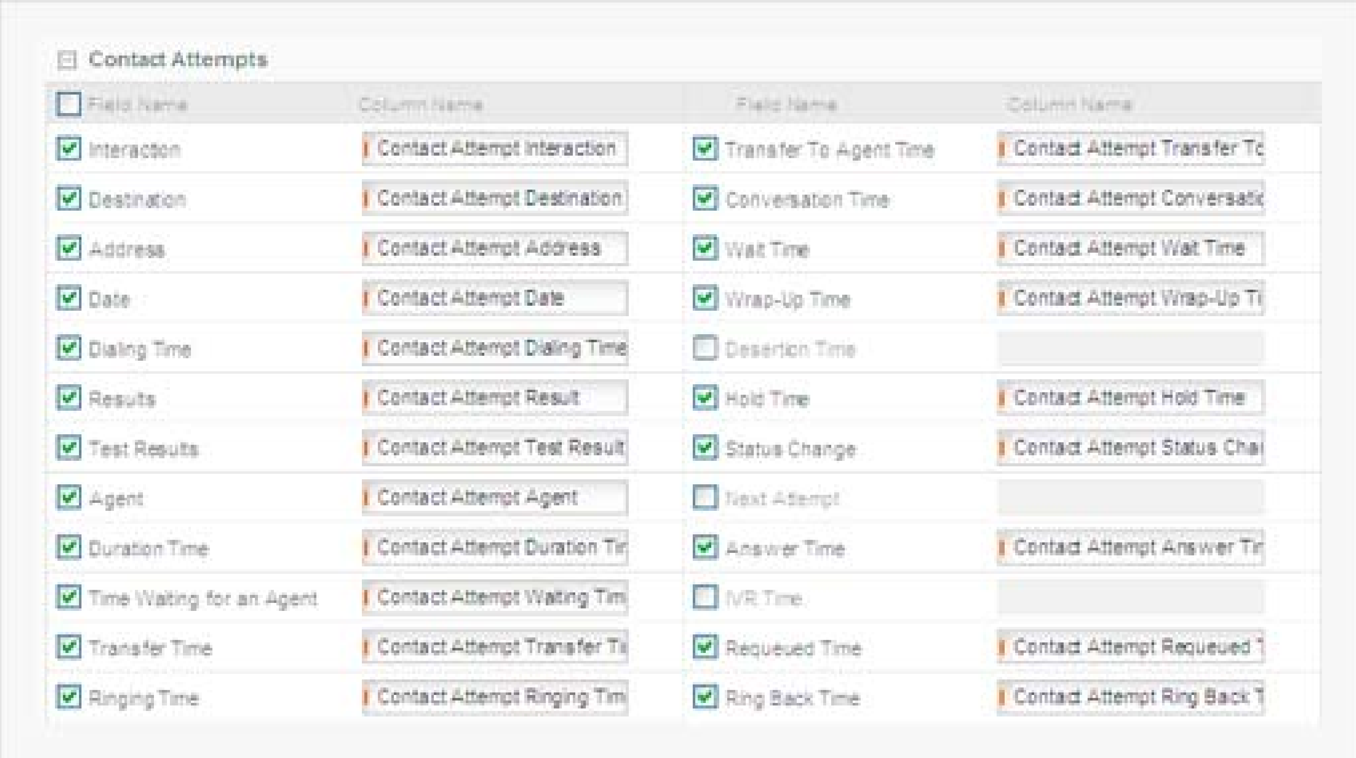


- **Batch name**: indicates the name of the batch that will be exported and the name of the column it will be exported to
- **Campaign**: indicates the name of the name of the campaign that will be exported and the name of the column it will be exported to
- **Outbound process**: indicates to which outbound process the batch is linked, the export will contain the name of the outbound process
- **Channel Type**: will export the kind of outbound channel used to contact the person (IE: SMS, Fax)
- **Priority**: indicates the priority of the contact in the batch in question
- **Reserved Agent**: if there's an assigned agent for the contact, this field will export the name of that agent to the CSV document. If the field is empty, then there's no reserved agent for that contact
- **Last contact attempt date**: indicates the date in which the system tried to reach the contact for the last time, within this same batch

- **Last Destination**: exports the last destination to which the contact was reached. Home, Office, Mobile phone, etc.
- **Last Address**: exports the last number in which the contact was reached
- **Last interaction**: indicates when the last interaction for the batch took place
- **Last results**: exports the last result of a communication attempt with this contact. For example: busy
- **Last Successfully contact date**: indicates the last time the system could successfully reach the contact
- **Next contact attempt date**: indicates the date in which the system will try to reach the contact next
- **Next destination**: exports the following destination in which the contact will be reached. For example: Home, Office, etc
- **Next address**: exports the next number in which the contact will be reached.
- **Batch status**
- **Batch cause**

Contact Attempts

This block is used to export the history of contact attempts for each contact. It gives the administrator the details of each call.



- **Interaction**: indicates the ID of interactions tried with the contact
- **Destination**: indicates to which destination the call was made (home, office, etc)
- **Address**: indicates to which number the system called
- **Date**: indicates the date of the different contact attempts
- Dialing time: indicates the amount of time the system spent dialing
- **Results**
- **Test results**
- **Agent**: indicates the ID of the agent who participated in the interaction
- **Duration time**: indicates the total lapse of the call, adding holding time, transfer time, etc
- **Time waiting for Agent**: indicates the amount of time between the moment the system reached the contact and an agent picked up the interaction
- **Transfer time**: indicates how much time elapsed during transfers of the call from agent to agent
- **Ringing time**: lapse of time between the moment the system gets reaches a phone and the call is answered

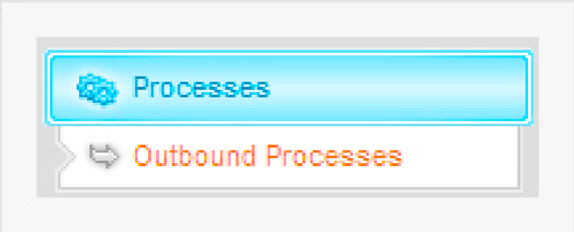
- **Transfer to Agent time**: the time elapsed between the system established a connection with the contact and it transferred the call to the agent
- **Conversation time**: number of minutes the agent spoke to the contact
- **Wait time**: total time elapsed waiting (adding up Hold time, transfer time, etc)
- **Wrap-up time**: amount of time between the call ended and the agent wraps up the call
- **Desertion time**: indicates how much time elapses since the system reaches a contact and the contact answers the call, and the contact hangs up because the system does not assign the call to an agent
- **Hold time**: amount of time the contact spends on hold
- **Status change**
- **Next attempt**: date and time of the next attempt scheduled
- **Answer time**
- **IVR time**: duration of the IVR processes for each call (if there are IVR processes configured)
- **Requeued time**: indicates how much time the call spent as a requeued call
- **Ringback time**

Once the administrator selects which fields will appear in the CSV exported document, he can proceed to save the layout so it appears in the list of available layouts.

An important note is that some fields will occupy one row (such as Contact name) while some others can occupy more than one.

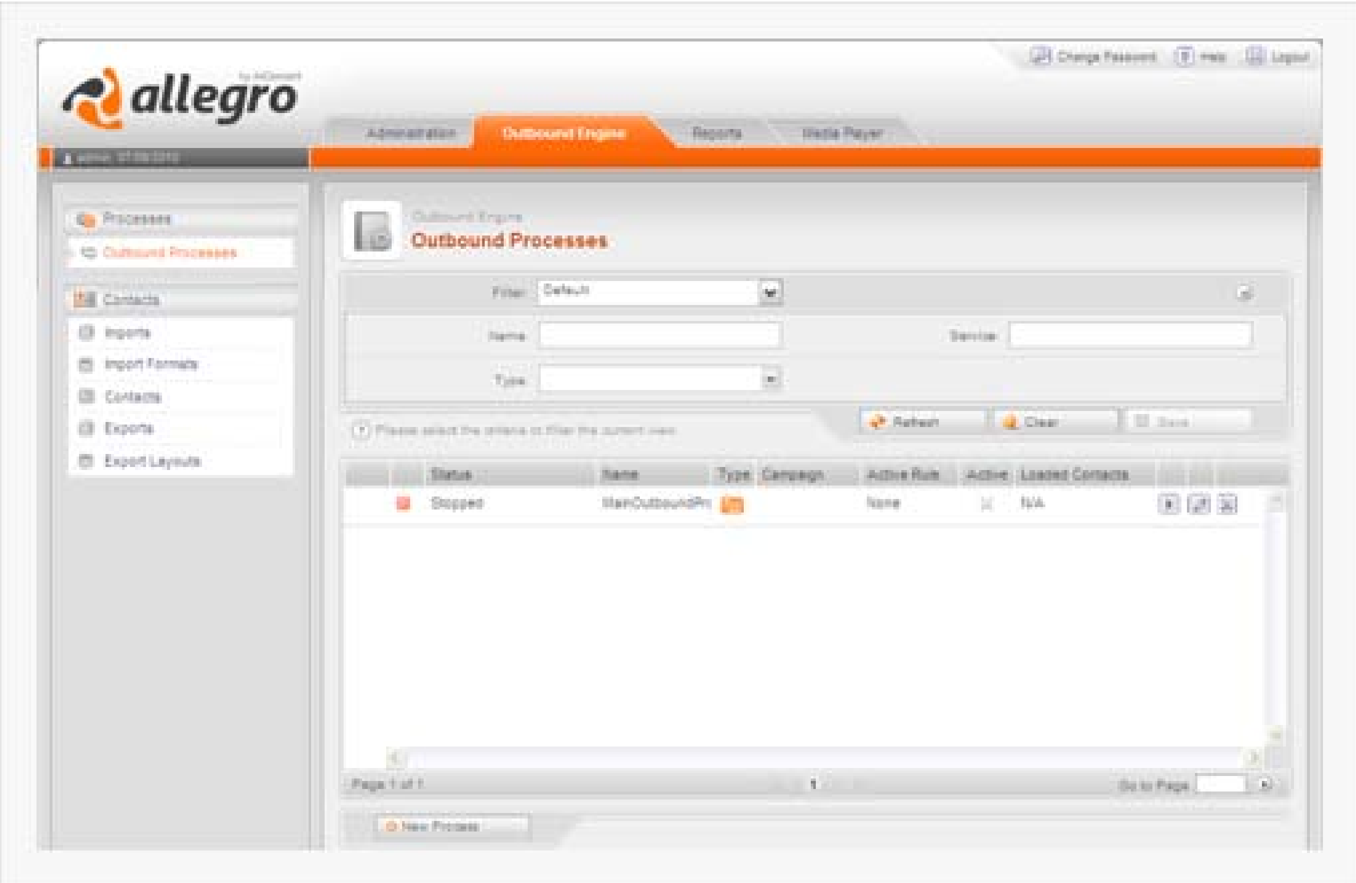
In this case, the system will not generate repeated entries for the fields that occupy less rows, but it will put all the fields in columns one next to the other.

Processes Menu



In the processes menu the administrator can configure the different rules and settings for outbound calling.

The outbound engine is a tool for the VCC that contacts clients in an automatic fashion, following a set of rules and commands given to the system in the initial configuration.



As we can see in the screenshot above, the Outbound Processes screen shows a list of all the different processes that have been configured for a given VCC.

In the list the processes that are inactive appear as “Stopped” in the Status field, while the active process has a different status.

The different statuses a process can have are:

- **Stopped**: the process is stopped by user request (or it has just been created)
- **Running**: the process is functioning with its corresponding engine

- **Disabled**: the process was deactivated by user request.
- **Invalid**: the process has been stopped due to an error or problem of some kind. After this is fixed, the process can start again normally

Each status has sub-causes associated, that give the administrator more information in order to take corrective actions.

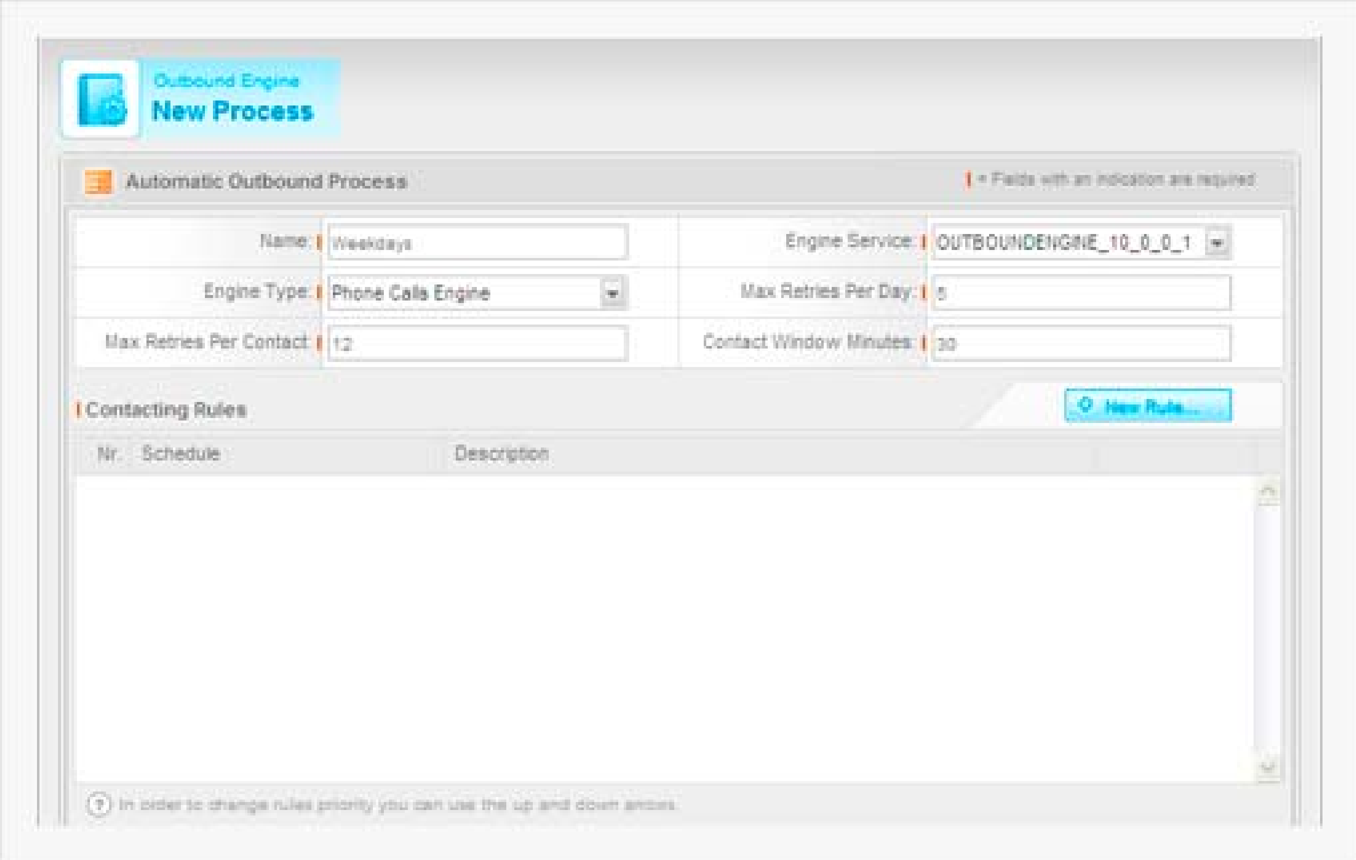
The sub-causes can be as follow:

- ***CAMPAIGN END***: The campaign ended or the process is inactive.
- ***MANUAL STOP***: the process or the engine were stopped
- ***INVALID INPUT DATA***: the data for calling is incorrect. The process is stopped or invalid
- ***INACTIVE CAMPAIGN***: the campaign is inactive. The outbound process is still working but it won't make calls until the campaign is active again
- ***ALL CHANNELS BUSY***: all the telephony channels are busy in conversation
- ***DIALING (MAX CHANNELS)***: the process is dialing in order to occupy all the possible agents
- ***NO AGENTS LOGGED***: there are no logged in agents for the campaign
- ***ALL AGENTS BUSY***: all agents are busy talking or waiting for a call
- ***DIALING***: the process is dialing in order to cover all the free agents
- ***ALL CONTACTS CONTACTED/CANCELED***: all the contact batches have been contacted or cancelled
- ***AVAILABLE CONTACTS BEING CALLED***: the remaining contacts on the database are being called
- ***CONTACTS WAITING SCHEDULE***: the remaining contacts are waiting to be scheduled
- ***NO CONTACTS LOADED***: there aren't any contacts in any batch
- ***LOADING MORE CONTACTS***: the engine is loading more contacts
- ***SYSTEM UNAVAILABLE***: some external system is not responding

Creating a new Outbound Process

To create a new outbound process, simply click on the “New Process” button in the bottom of the screen.

The new process tab will be opened and the administrator will be able to generate the new process by defining the different fields.



The first step to configure the new outbound process is to set the following fields:

- **Name**: indicates the name that will identify the process
- **Engine Service**: here the administrator will choose the service from which the outbound process will be performed.
- **Engine type**: in this field the administrator will indicate which type of engine the process will use. It could be a Phone Call Engine, an E-mail engine or an SMS engine
- **Maximum Retries per Day**: indicates the maximum amount of calls that can be made to a given number in a day.
- **Maximum Retries per Contact**: indicates the maximum amount of calls the system is allowed to do for a given contact.
- **Contact Window Minutes**: Is the number of minutes the system keeps the contacts it's calling in its cache For example, if the system is dialing at a ratio of 5000 calls per hour, and the contact window is of 30 minutes; the system will have 2500 contacts in memory

Once these fields are set up, the administrator needs to choose a Contacting Rule from the list below.

In the case of the image, there are no contacting rules configured, so we will configure one from scratch.

New Contacting Rules

A contacting Rule is composed of a set of procedures the system will carry out in order to contact the clients.

The contacting rules contain basically two points:

- The time and day in which the system will perform the calls
- The actions to be taken in case there's no answer, the line is busy, etc.

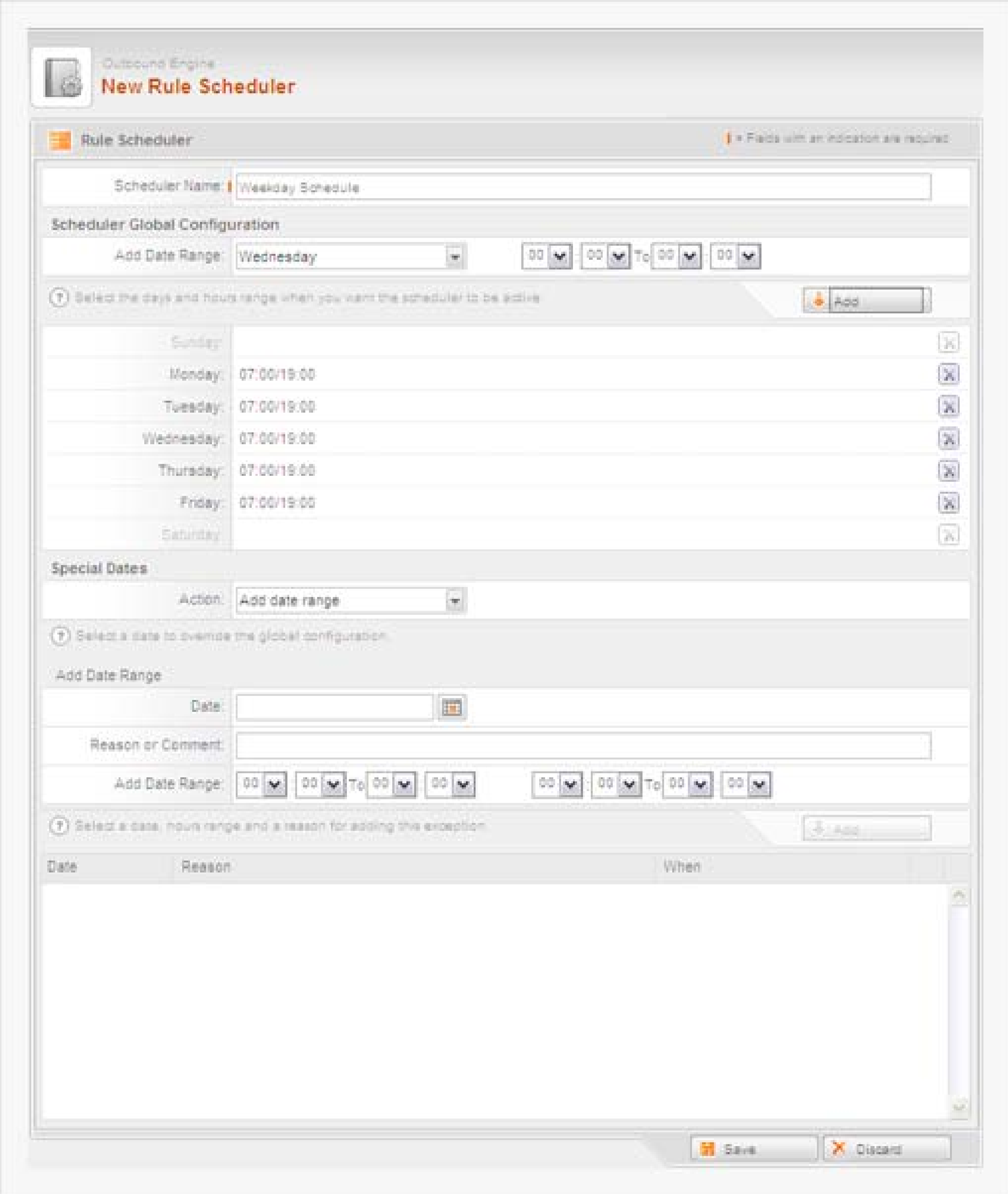
The first two fields on the new rule tab are

- **Schedule:** the administrator can create a schedule for calls or use an already created schedule.

  Either way, there MUST be a schedule assigned for each process.

- **Description**: enter a brief description of the schedule of calls. For example: "Wednesdays only", etc.

To create a new calling schedule click on the "+" button, located to the right of the list box. In this case, the following screen will appear, giving the administrator the possibility of setting up different characteristics for the schedule of calls.



The first field is the Scheduler Global Configuration.

Here the administrator will be able to configure in which days of the week and at what time the campaign will be operative.

In “Add Date Range” the administrator will choose the days in which the process will be active by checking a box next to the desired days.

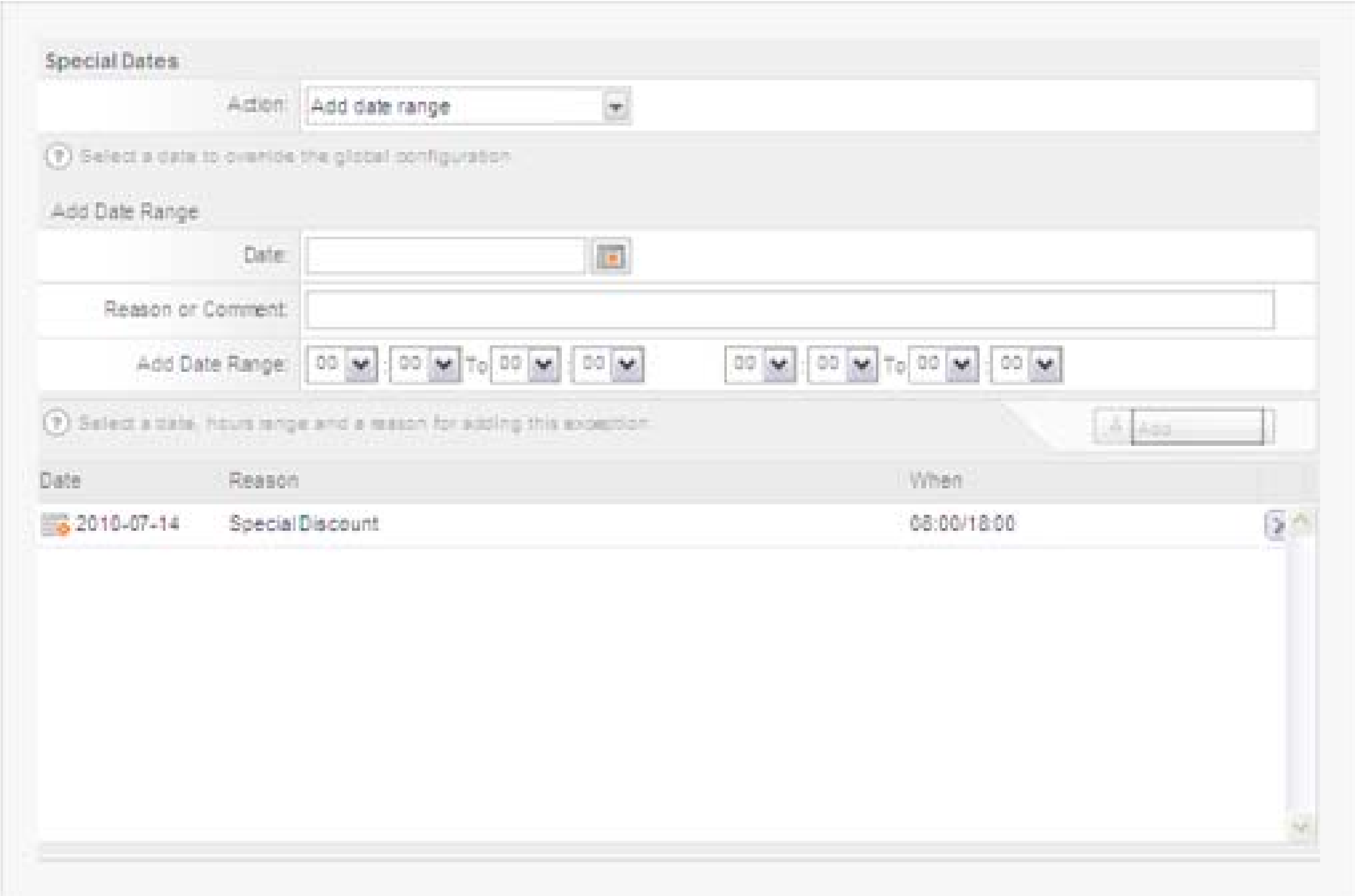
Once this is done, we can proceed to the configuration of the time in which the process will be operational.

If the Outbound Process needs to be operative on Mondays from 9:00 to 19:00, then we need to select “Monday” in the Date range bar, and then select the hours that encompass the desired timeframe.

If the timeframe for the process is the same for every day, then the administrator can check the boxes for all days and afterwards will select from which hour to which hour the outbound engine will be operative.

If every day the process has a different timeframe, then the administrator will have to set up the timeframe day by day, by checking one day at a time and setting the schedule one by one.

To add exemptions or days in which the campaign will not be functioning, the administrator click on “Special Dates” and add a “Date exclusion”.

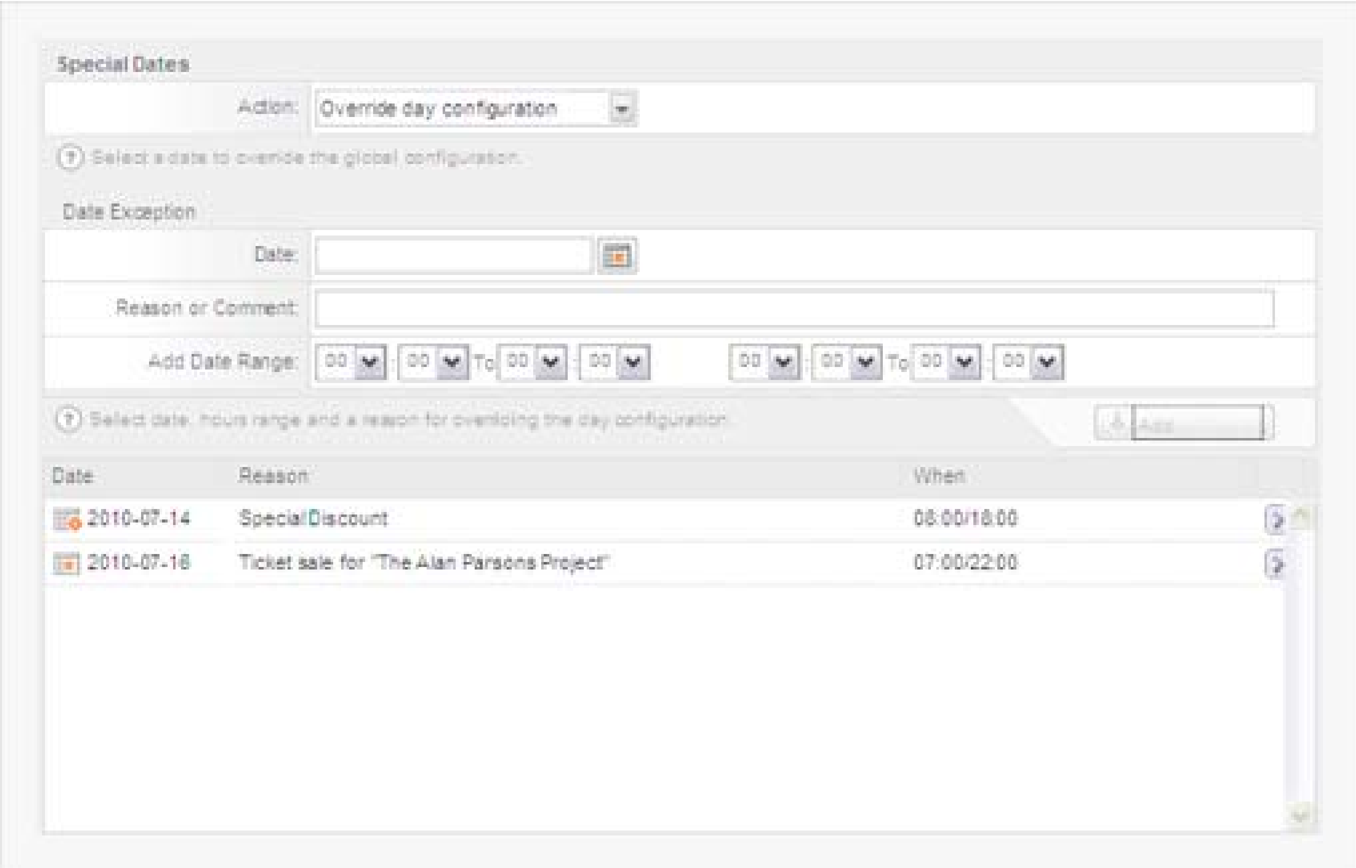


Here the administrator will be able to configure the days in which the Outbound process will not be operative, and can specify the reason for this. For example: “National Holiday”, “Office moving”, etc.

The interface also allows the dates to repeat themselves yearly, or check if it’s a one year only event.

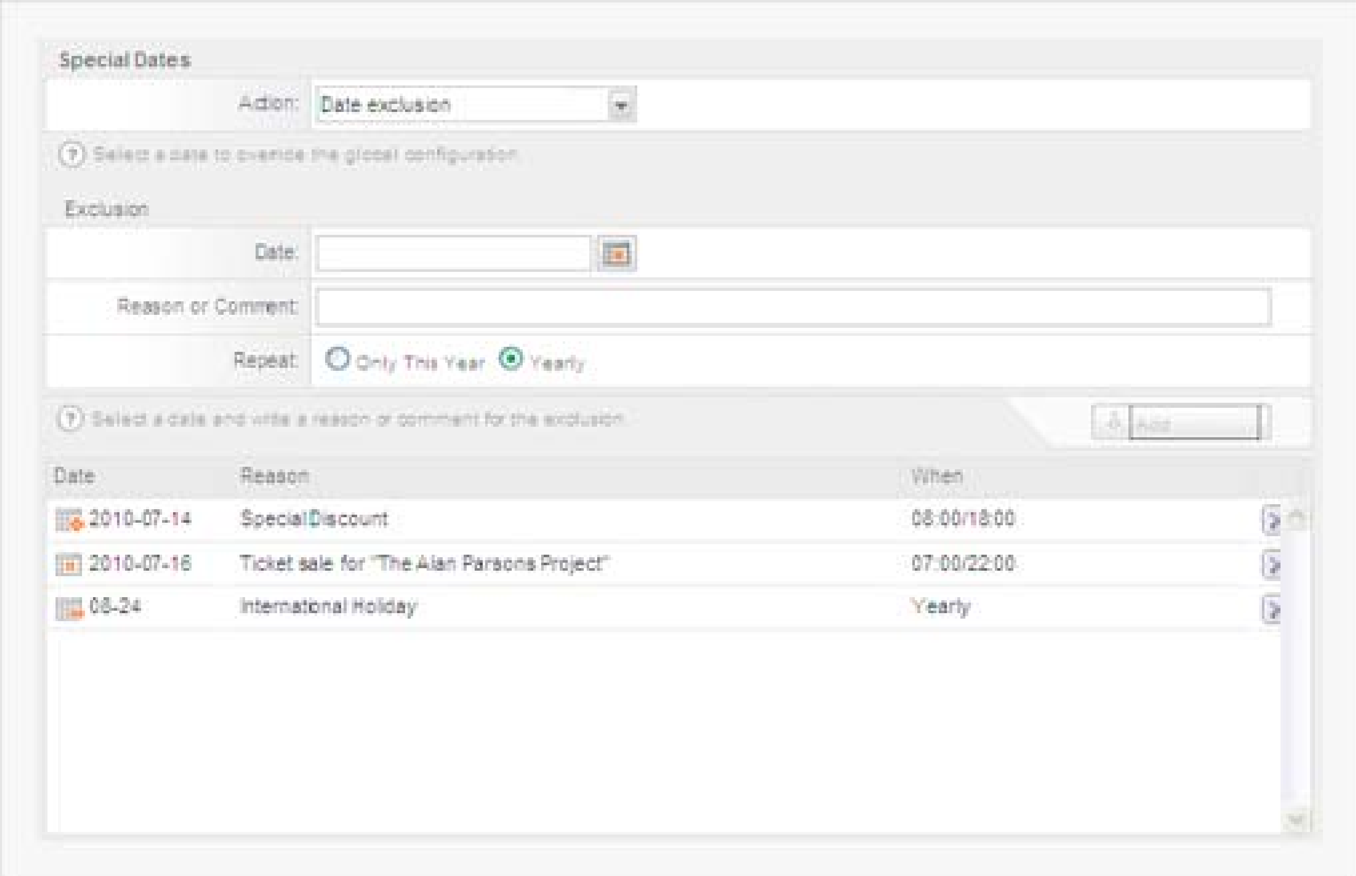
In the case illustrated above, we've added a date range. This consists of a day in which the operative hours of the process will be different from what they usually are. The added range will establish the working hours of that day.

This is used to set working days in dates that are not predefined as working days. For example, on Sundays.



If we use the Override Day Configuration, the selected dates will have a special working time that may not coincide with the normal working hours of the outbound engine.

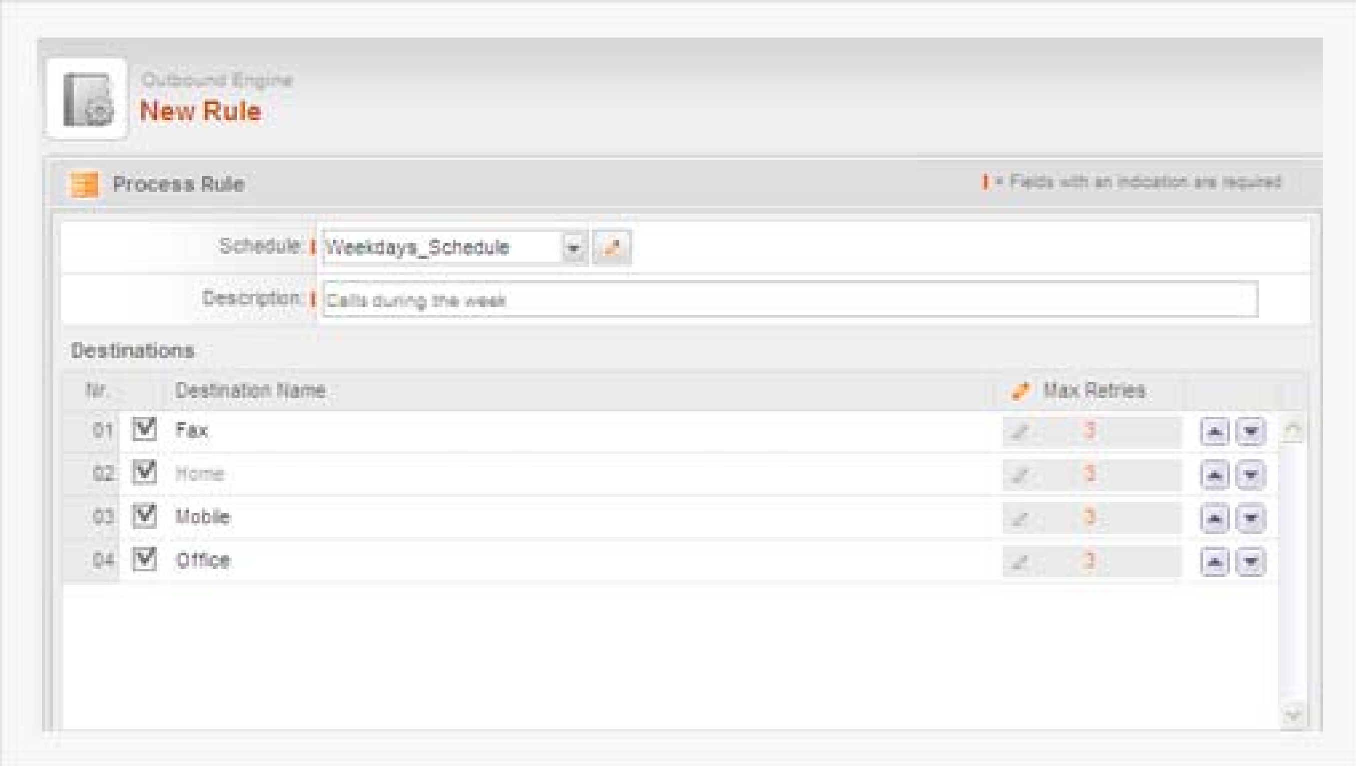
For example, if we have a campaign for the sales of concert tickets, the administrator can extend the working hours for the day of the concert by overriding day configuration for that day.



In this case we've added an international holiday to represent an exclusion, a day in which the process will not be operative.

The exclusions can be yearly or for one year only.

After saving the changes in the "Rule Scheduler" tab, the system will go to a screen where the administrator can set up actions, and insert a description for the different arrangements.

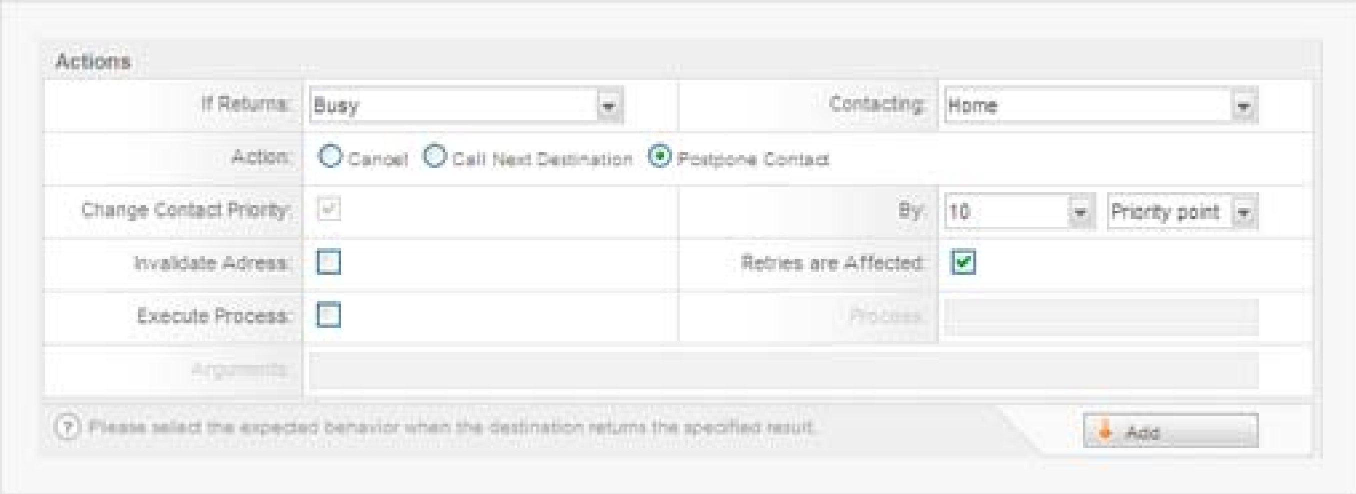


The image depicts the selected schedule (in this case we selected the schedule we created for this case in particular). The description is simply a brief account of the days in which the process will be active.

Below the schedule and description, there is a list of the different contact destinations the process will use to reach the client and in what order they will be used. The administrator can change the order, depending on the needs of the campaign. If for example, we are setting up a rule to call housewives, we will probably use the home phone number first and the mobile phone after. Another configurable feature is the amount of attempts for each destination.

All of the available methods are selected in this case. However, if the administrator wishes to contact people only in their home phones, he will uncheck the rest of the boxes.

The maximum number of retries is the number of times the system will call each contact. It can also be edited by double clicking on the “Max Retries” box for each type.



In this module, the administrator can set up specific actions when the process faces different situations.

The situations contemplated are:

- Abandoned
- Answering machine
- Busy
- Call rejected
- Call rejected by endpoint
- Can't route to endpoint
- Configuration error
- Congestion
- Connected
- Fax
- Handshaking failed
- In progress
- Indirect contact
- Invalid use of network
- Link down
- Network error
- No answer
- Normal call clearing
- Number in black list
- Protocol error
- The contact passed away
- The number has changed
- Unknown cause

The administrator can pair each situation with one of the different phones for each contact. These being: Home, Fax, Mobile, Office, or for any destination.

After choosing the destination and the desired situation, the administrator will proceed to set up the rules for the engine to follow in each situation.

The available actions are:

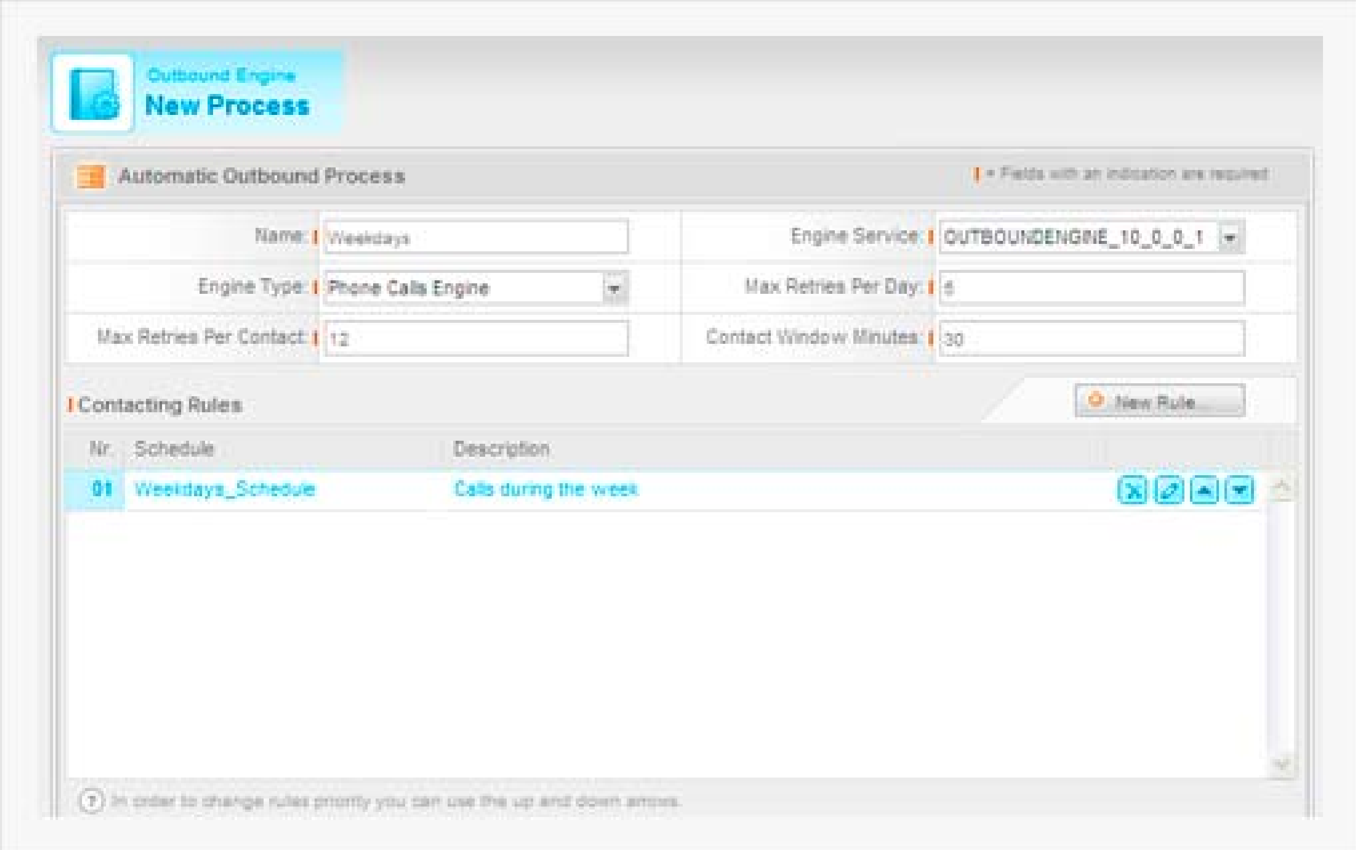
- **Cancel**: cancels the contact on the batch and doesn't reach him again
- **Call next destination**: attempts to reach the contact using the following destination (home, office, etc)
- **Postpone contact**: the contact will be called in the future

Other actions are:

- **Change contact priority**: if this is checked, the placement of the contact in the list of contacts will change. The administrator can choose to move it X places upwards, or downwards in priority points, or in percentage.
- **Invalidate Address**: Cancels the address of the contact in question so that the system doesn't try to reach the contact using the same number that failed before
- **Retries are affected**: if this is checked, the present call will affect the number of available retries to that number. Usually, this option is used when there's a result such as "Link Down", in which the system cannot reach the contact due to technical issues; and the administrator doesn't want these problems to affect the number of retries.
- **Execute process**: executes a business process defined in the InConcert middleware server

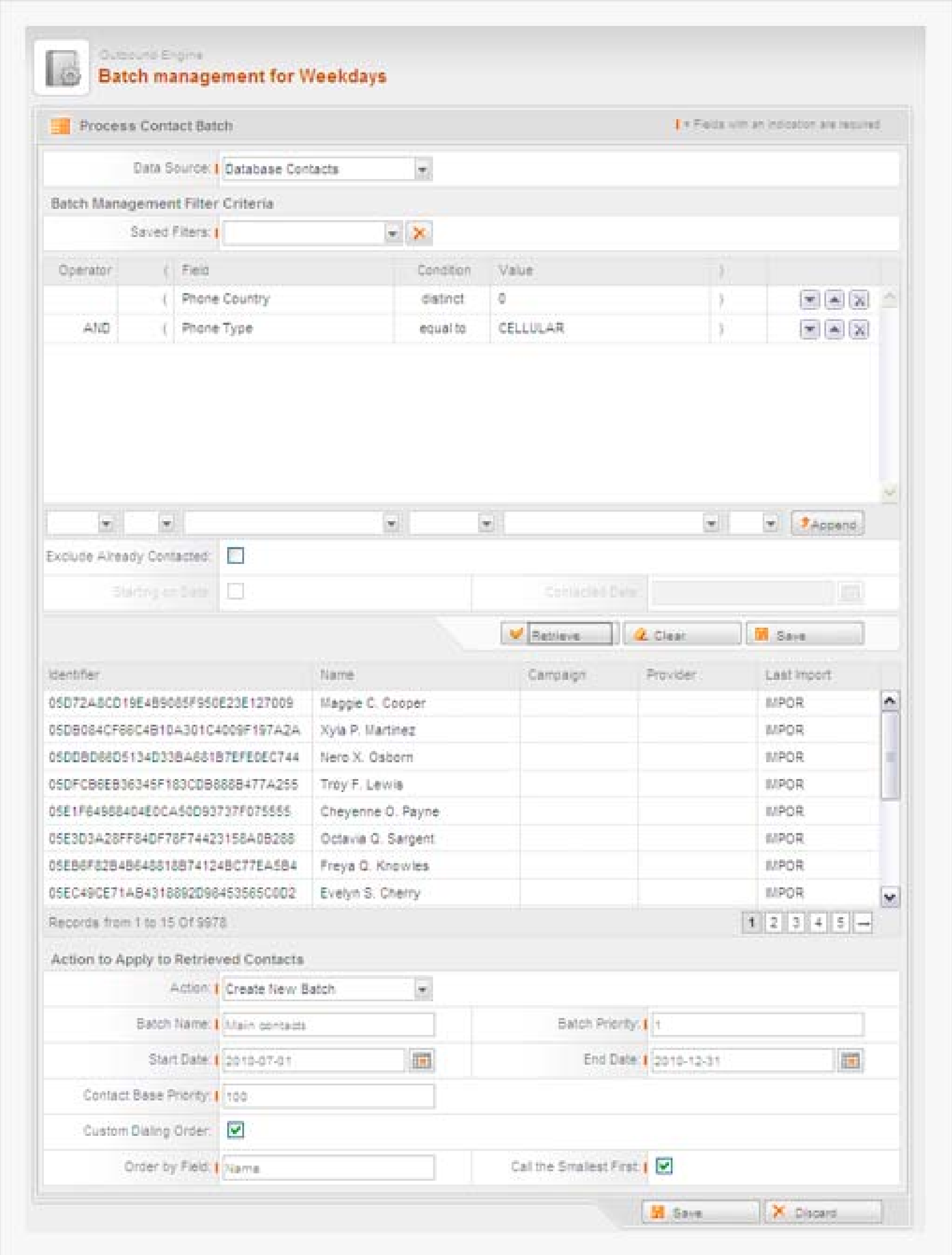
Below the box for configuring new actions, the administrator can see a list of the available actions for different situations.

After all has been configured the administrator has to click on the "Save" button in order to save the changes to the process.



After creating the Rule, it will appear in the New Process screen. In this case we've selected the Schedule we created before.

The next step is to specify who are the contacts that will be called. To do this, the administrator has to create and manage Contact Batches.



Contact batches are groups of contacts that share similar characteristics. For example, if the campaign needs to be centered in people from country A who have a cellphone, here the administrator will create filters that will segment the database.

Let's analyze it field by field.

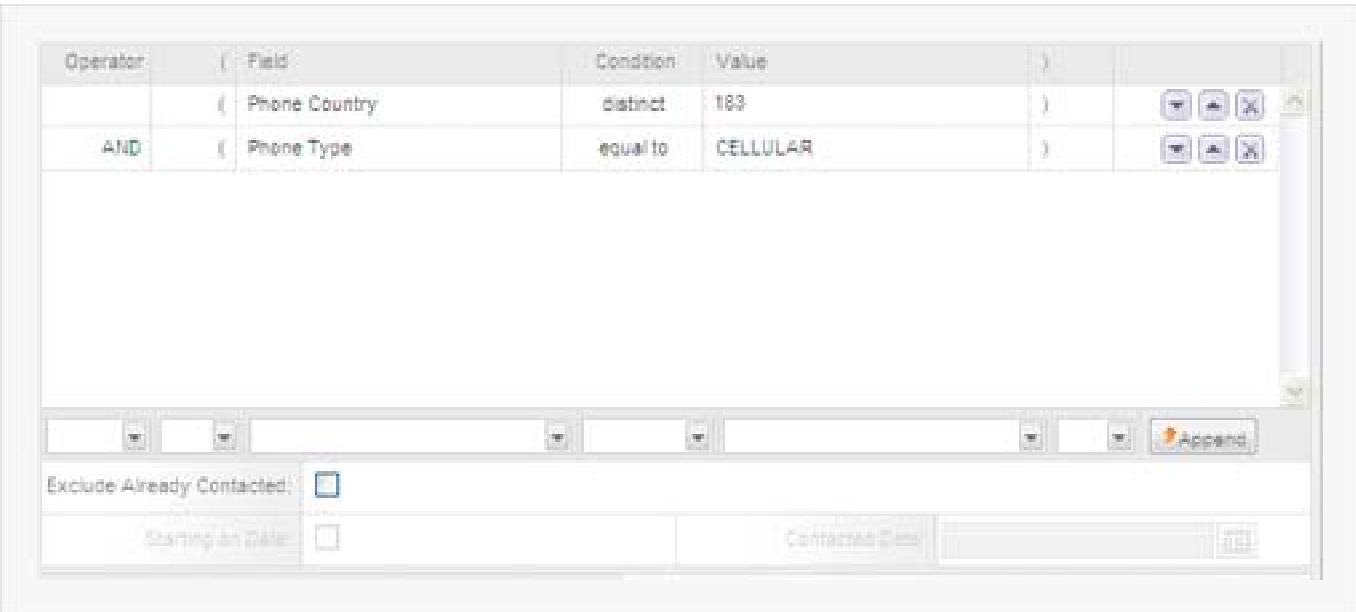
The first step is to select the source of the contacts we will use. The contacts need to be imported beforehand. See page 7 for an explanation on contact imports.

If the administrator chooses "Database Contacts", it's because the origin of the contacts is the imported group of contacts in the database. This option is chosen when the administrator wants to create new contact batches.

When the administrator chooses "Current Process Batches" is to operate upon an already created batch.

If the administrator has already created a filter for contacts, then the filter can be reused by selecting it in the list of "Saved Filters".

If this is not the case, then the administrator can generate a filter from scratch.



In order to start creating a filter the administrator needs to generate conditions for the contacts to fulfill in order to be a part of the batch.

The first condition needs to be entered without any operator in the beginning. Namely, the first box to the left needs to be left empty.

The rest of the boxes will be filled according to the administrator's needs.

There are several functions to identify the fields.

If there's a need for the contacts to satisfy more than one condition, the following conditions should begin with the operator "AND". If, on the other hand, there's a need for contacts to comply with ONE or ANOTHER condition, then the second one should start with the operator "OR".

By clicking on the "Retrieve" button the system will identify the contacts that comply with the conditions provided and fill a list with those contacts.

Identifier	Name	Campaign	Provider	Last Import
05D72A8CD19E4B9085F950E23E127009	Maggie C. Cooper			IMPOR
05DB084CF68C4B10A301C4009F197A2A	Xyla P. Martinez			IMPOR
05DDBD88D5134D33BA881B7EFE0EC744	Nero X. Osborn			IMPOR
05DFCB6EB36345F183CDB888B477A255	Troy F. Lewis			IMPOR
05E1F64988404E0CA50D93737F075555	Cheyenne O. Payne			IMPOR
05E3D3A28FF84DF78F74423158A0B288	Octavia Q. Sargent			IMPOR
05EB6F82B4B648818B74124BC77EA5B4	Freya Q. Knowles			IMPOR
05EC49CE71AB4318892D98453565C0D2	Evelyn S. Cherry			IMPOR

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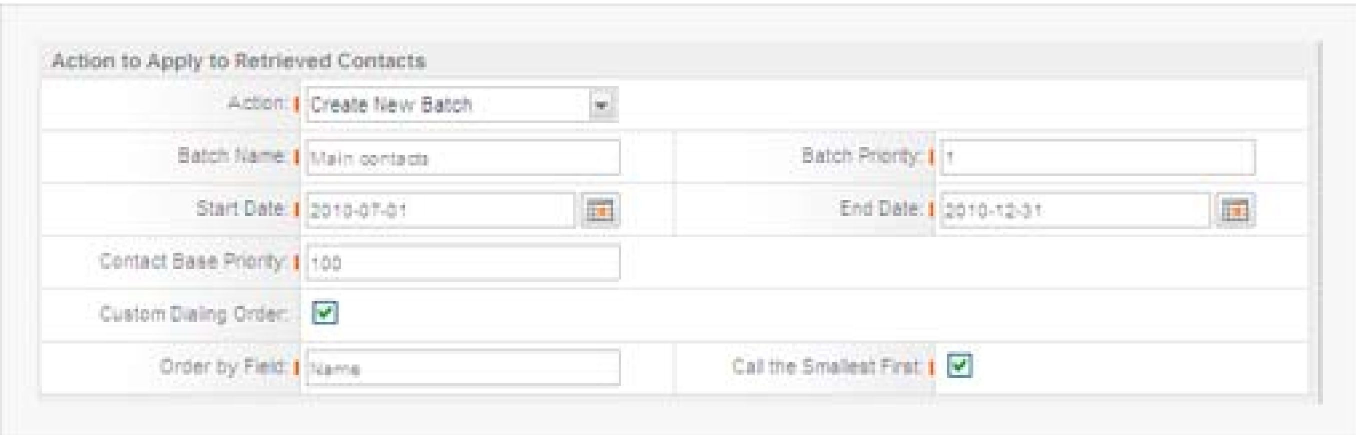
The following step is to configure a specific process for the retrieved contacts. The fields to configure are:

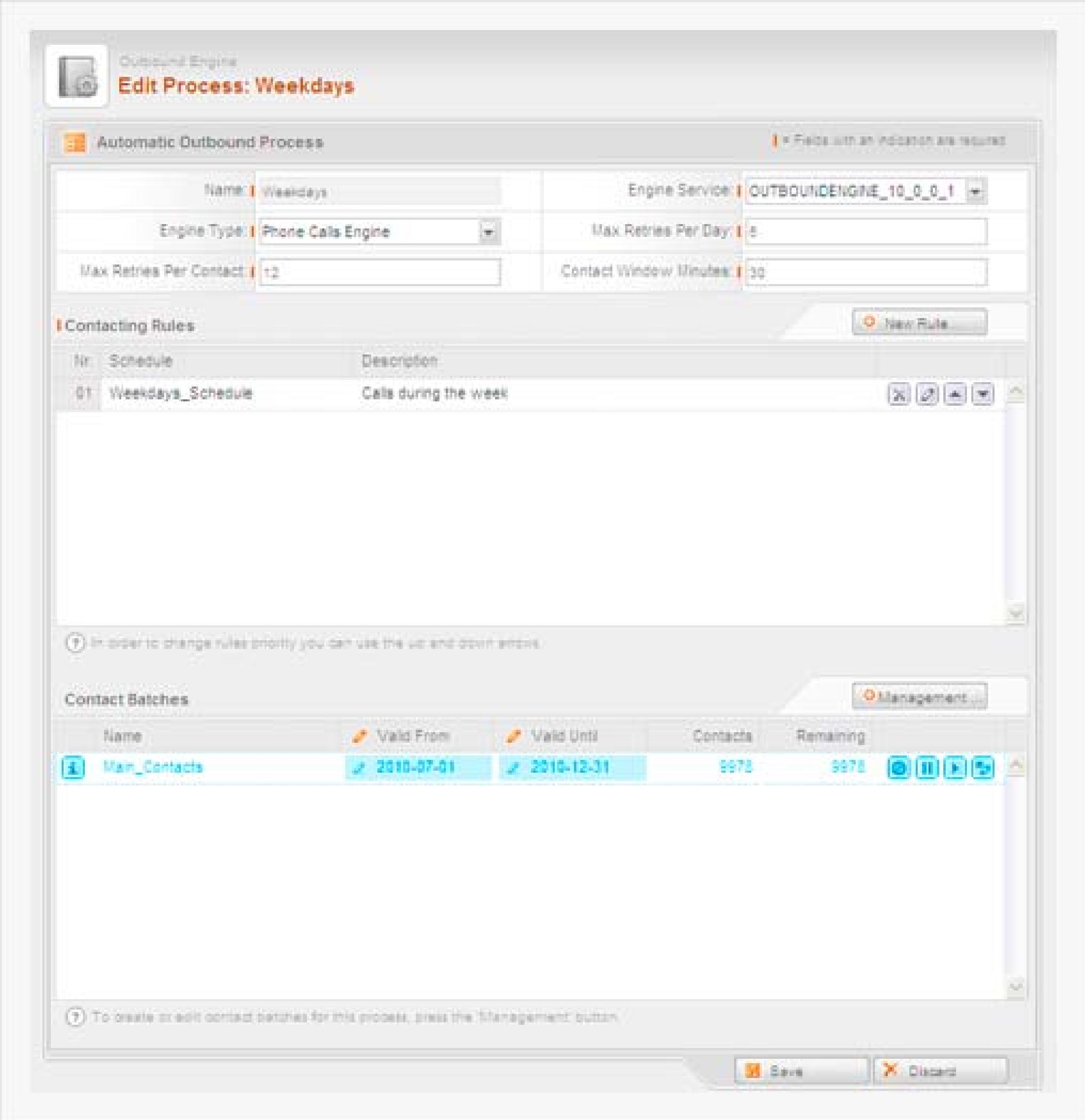


- **Action**: in this case the administrator can chooses to create a new contact batch.
- **Batch Name**: the name that will identify the new contact batch from other batches created previously
- **Batch Priority**: indicates the importance of a batch in relation to other batches. If for example, we'd like to call first the clients with higher debt levels, we will create a batch for them with a higher level of priority.
- **Start Date**: since each batch can be valid for a period of time, the administrator indicates when the validity period starts
- **End date**: indicates when the validity period will end
- **Contact Base Priority**: is the basic priority for contacts within the batch. Contacts with higher priority are called first
- **Custom dialing order**: if checked, the system will not randomly call contacts, but the calls will be made following a certain order.
- **Order by Field**: indicates which field the system needs to observe so it can order the contacts
- **Call the smallest first**: if checked, the system will call the contacts in ascending order. For example if the field chosen for ordering the contacts is "Number of online transactions in the last month", the system will call first those clients with zero transactions.

The contact base priority is the place the contact occupies on the list of outgoing calls. This field is related to the "Order by Field" function.

After the administrator has done all this, he needs to click on the "Save" button, in order to save the changes he has introduced.

As can be seen in the following image, the new batch has been created, and will be used by the process "Weekdays".



To the left of the row there’s an “Info” button, that prompts a list with summary information on the state of each contact in the batch.

By clicking on the “Save” button, the administrator will save the process, and it will be available for use in the different campaigns.

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