# Webex Contact Center Campaign Manager User Guide

Version 4.2.1.2401

# TOC

# Customer Engagement

Campaign Manager is a powerful campaign management and list management tool. It is designed with functionality and features aimed at increasing right-party connects and achieving campaign business objectives through multi-channel outbound interactions. Campaign Manager allows scheduling of different selection strategies by time of day and day of the week. It allows for controlling the sequence of communication channels or intelligently managing the best channel or number to contact at the optimal time. Campaign Manager ensures compliance with federal, state, TCPA, and FDCPA (Regulation F) laws while maximizing list penetration with high success rates.

## Integration

### Webex Contact Center

Campaign Manager provides Campaign Manager and Compliance for Webex Contact Center. Webex Contact Center uses its in-built Dialer for different pacing modes. Campaign Manager provides the intelligence for contact management and also adheres to all compliance requirements. Campaign Manager controls Webex Contact Center campaigns from the application.

# Campaign Manager User Guide

## Sign in to Campaign Manager

To sign in to Campaign Manager:

**Login Using Campaign Manager Users Credentials**

1. Go to the Campaign Manager sign in page. URL is delivered with Campaign Manager package.
2. Enter the User ID and initial password provided with the package. To add users or admin, refer to Campaign Manager Users.

**Login Using Windows Authentication**

If Administrator has configured the windows users authentication, log in to the Campaign Manager using the domain credentials.

To add the window users, see Window Users.

**Login Using Single Sign-On (SSO) identity provider**

If Administrators has activated SSO authentication, log in by Single Sign-On (SSO) identity provider. To add the SSO users, see SSO Users.

## Password

The following rules apply to passwords:

- Although passwords can be 8-10 characters long, password length is set by the enterprise administrator, so the minimum number of characters may be greater than 8.
- Passwords cannot start or end with a space.
- You cannot use an underscore (_) as the last character in a password.
- Valid characters for passwords are A-Z, a-z, 0-9, the special characters $-_.+!*'(), and spaces.
- Although other special characters can be used, they can create problems when entering passwords from a command line or in a web address, so they should be avoided.
- Strong passwords contain a mix of letters, numbers and special characters. Passwords associated with secure enterprises must contain at least one of each.

# Change Password

To change the password of your account:

1. On any page, click the **User** icon and click **Change Password**.
2. Enter the current password.
3. Enter the new password and confirm by entering again.
4. Click **Submit**.

# Campaign Manager Console

Campaign Manager Console is an Administration module that allows you to perform many administrative tasks:

- Configure application parameters
- Manage campaigns
- Manage lists
- Manage administrative and supervisory users
- Maintain call strategies and business outcomes
- Configure Email and SMS channels
- Create call guides for agents to use.

**Note**: The following are not supported in the Webex Contact Center application, but there may be references in the document:
 - Email, SMS, and IVR campaigns
 - Callback
- AEM (Agent-Executive Mapped) calls.

# Language Support

Campaign Manager provides support for multiple languages such as English, Chinese (Traditional), Thai, German, Japanese, Italian, French, and Spanish. Users can select the language at the time of installation.

# Home Page

The following table describes the different elements of the application Homepage:

| Field | Description |
|---|---|
| Menu Icon | Use this to expand or collapse the left main Menu. |
| Notification Icon | Count of system alert notifications generated by the system. |
| User Info | Define the user information. |
| User Name | Logged-in user name. |
| Change Password | Allows you to change the Password. |
| Logout | Logs you out of the application. |
| Menu Pane | Shows links to the various modules of the application. This also contains copyright information. |
| Version Info | Displays the current version of the application. |
| Content Area | Displays the configurable fields as entry areas, dropdown lists, checkboxes, and so on. |

## Home Page Widgets

The Home Page contains the following widgets:

- Real-time Snapshots
- Campaign-specific quick links
- To-do list
- Application-wide quick links

## Real-time Snapshots

This widget contains the snapshots that provide a live, high-level, 360-degree view of the application. The following information is cumulative for the application from its installation and first use:

- Active Campaigns - This section displays the application-wide number of active campaigns. This also shows the number for campaigns in Total, Inactive, and Elapsed categories.
    - Total - The total number of campaigns created on the application.
    - Inactive - The total number of campaigns not currently executing - in a time-suspended or stopped state.
    - Elapsed - The total number of campaigns that are past the campaign end date and time.

- Total Contacts - The total number of contacts uploaded to the application across all campaigns. This also shows a break up of Open, Fresh (yet to be dialed), Schedule, Closed, and Other contacts.

  - Open - The number of contacts Open at the current moment. These numbers include contacts that are delivered to the dialer but not yet dialed out.

  - Fresh - The number of contacts not dialed even once to this moment. These numbers include contacts that are delivered to the dialer but not yet dialed out.

  - Scheduled - The number of contacts that are scheduled for dialing. This is the sum of contacts having status as 0 (Open) or 4 (Delivered), and the IsFresh=0

  - Closed - The number of contacts closed.

  - Others - The contacts that cannot be delivered - the sum of contacts that are Scrubbed (contact status = 9), flushed/closed through the Manage Contacts functionality (contact status = 7), and expired (contact status = 34).

The following information contains data only for the current day:

- Contacts Dialed - This shows the total contacts dialed across all campaigns.

- Contacts Connected - This shows the total contacts successfully connected

- Calls Dialed - This shows the total calls dialed across all campaigns. This includes multiple dial outs for same contacts. This number gets incremented even if the call is connected to customer's voice mail.

- Calls Connected - This shows the total calls connected between an agent and a customer across all campaigns. This includes multiple connects for same contacts.


## Quick Links

This widget links you to various pages on the application, across all campaigns. This makes navigation to the desired page easier and faster with a single click from the home page. Perform the following steps to add pages to quick links:

1. Click **Settings** on the header line of the Quick Links widget to add a new quick link page. All pages that can be added as quick links to this widget are listed.

2. Select check boxes corresponding to the pages to list in the Quick Links widget.

3. Click **Save**.


## Campaign-Specific Quick Links

This widget links you to various pages relating to campaigns on the application.

1. Click **Campaign** to see the campaign listing page.

2. Click **Edit** on the **Action** bar of the **Campaign** for which you want a quick link.

3. Click **Link** on the desired configuration item to place the quick link on the widget. Click **Delete** to delete a quick link.

## To-do List

Application provides an inbuilt to-do list, useful to track or manage activities to be handled by the dialer admin. This widget acts as a versatile application-embedded diary. You can add tasks that need to be addressed in a to-do list.

The **To Do List** widget shows the remaining time for the task to be completed in different color codes:

- **Green** when the remaining time to perform the task is in days.

- **Orange** when the task is due tomorrow.

- **Blue** when the remaining time to perform the task is in hours.

- **Red** when the remaining time to perform the task is in minutes.

    **Note**: The overdue tasks are displayed without any color code. You may delete them.

Perform the following steps to add a task:

1. Click **Add New** on the header line of the **To Do List** to add a new task.

2. Enter a **Title** for the task. For example, run a Launch Campaign in SMS mode.

3. Enter the **Activity** to be performed as part of the task. Activity related to the above item is **Create the SMS Campaign**.

4. Enter a **DateTime** for completion of the task.

5. Click **Save**.

## License Violation

The Home Page displays a static alert in the following scenarios:

- Configured days before expiry of the license, a countdown to the license expiry date and time.

- A countdown to the cease date, when this kicks in.

- See License Violation for more details. Users should take appropriate action to restore the licenses.

# Campaign

A campaign is a collection of records/contacts. In a campaign, you can upload contacts, define dialing priority, schedule strategies, and perform various other tasks. You can also use campaigns to handle callbacks, which are initiated based on the request of customer to be called back or automatically initiated by the system due to a failure to contact the intended person. A campaign functions as a collection of lists, where each list comprises the contacts uploaded.

This section allows you to integrate with the campaign of the partner product (Dialer specific) or with the Queue (non-dialer specific) to fetch details. Additionally, this section allows you to assign a campaign to a group.

## Prerequisites

The prerequisites to create a campaign are listed below:

**Mode** - The various methods using which you can reach a customer. Examples of modes are Home Phone, Work Phone, Mobile (Voice), SMS, Email, and SIP, Social Media (WhatsApp, Twitter, Facebook Messenger, etc.) modes.

**Note**: SIP, SMS, Email and Social Media modes (WhatsApp, Twitter, and Facebook Messenger will be available in a future release.

**Contact Strategy** - Contact Strategy is about configuring a set of rules for various modes. This set of rules decides, the mode on which a contact is reached (usually based on the weight assigned to the mode), the time at which a contact is reached on a specific mode, the time when retries are dialed out on configured modes, etc. See Contact Strategy for more details.

**Time Zone** - The list of timezones configured for the outbound campaign. This is relevant for campaign execution as also dialing out contacts in their respective timezone. See Time Zones for more details.

**Note**: You must not mention more than 60 characters or any special characters while adding a campaign name.

These are dealt with in more detail in the respective sections.

## Getting Started

On the left menu pane, click **Campaign** and the **Campaign Home** screen appears.

The following details for each campaign are listed as given below:

**Note**: Click any grid header to sort the data in ascending/descending order by the grid. The **Status Completed (%)** column sorts first by the status and then by the percentage.

**Campaign Percentage** is calculated using the formula below:

*TotalPercentage = CompletedCalls * 100 / TotalCalls*

In the above formula, completed calls is computed as below:

*CompletedCalls = Count (Closed) + Count (Other)*

1. **Channel** like Voice, Email, SMS or a combination of voice and non-voice.

2. Click the **Campaign Name** to load the campaign details for editing.

3. **Group Name** that the campaign belongs to. For Shared List campaigns, no specific campaign group is listed; only shows as Shared List.

4. **Start Date Daily Start Time** - The start date for the campaign and the daily start time for the campaign.

5. **End Date Daily End Time** - The end date for the campaign and the daily end time for the campaign.

6. **Status** and **Completed**:

    a. **Created** - A campaign is created and yet to start dialing contacts. The status bar is light blue.

    b. **Executing** - Campaign in a running state, that is, dialing contacts. The status bar is green.

    c. **Starting** - When you start one or more campaigns using the Page Actions buttons, the status shows as **Starting**. Click the **Refresh** button to confirm the campaign has started and status has changed to Executing.

    d. **Stopping** - When you stop one or more campaigns using the Page Actions buttons, the status shows as **Stopping**. Click the **Refresh** button to confirm the campaign has stopped and the status has changed to Stopped.

    e. **Stopped** - A campaign is not running. The status bar is red.

    **Note**: Campaign in the Stopped state do not automatically change to Executing at the configured campaign operation time. An administrator should start such campaigns manually.

    f. **Group Stopped** - The mapped parent campaign group is disabled by the administrator. All campaigns in the disabled group are in the Group Stopped state. The status bar is red.

    g. **Time Suspended** - Campaign is suspended (in a temporarily stopped state). A campaign is automatically time-suspended outside the configured hours for execution, holidays, campaign weekends, inoperative Day of Week, etc. At the configured campaign operation time, the state automatically changes to Executing. The status bar is beige.

    h. **Elapsed** - Campaigns that are past the configured end date and time are marked with the status Elapsed, and the status bar is brown.

    i. **Completed** - The percentage shown at the end of the status bar indicates the percentage of contacts dialed out (from the total number of contacts uploaded for the campaign).

    j. **ECT** - The **Estimated Completion Time** for all the dialable contacts in the campaign to be dialed out. This is calculated based on history and current day data of total records processed and total duration processed.

**Campaign Statistics**

1. **Total** - The total number of contacts uploaded for the campaign.

2. **Open** - The number of contacts in an open state. Contacts with status 0.

3. **Fresh** - The number of fresh contacts that are yet to be dialed out the first time. Contacts with status 0 and IsFresh equals 1 in the database.

4. **Scheduled** - The number of contacts that are scheduled for dialing. Contacts with status 0 and IsFresh equals 0 in the database.

5. **Closed** - The number of closed contacts. Here you cannot make dialing attempts on closed contacts unless it is reopened. Contacts with status 1.

6. **Others** - The number of contacts in states other than open, fresh, scheduled, or closed.

**Total Contacts** is calculated using the formula below:

*TotalContacts = Count(Open) + Count(Closed) + Count(Other)*

See Contact Statuses for more details.

Each contact that is uploaded to the application is tagged with a status. See Contact Status Details for more information.

**Contact Status Details**

| Status | Name | Description |
|---|---|---|
| 0 | Open | Open Contact. |
| 1 | Closed | Closed contact. |
| 2 | Temporarily Locked | Contact temporarily locked, will not be delivered. |
| 3 | Upload in Progress | Contact in the midst of upload process. |
| 4 | Delivered to Dialer | Contact delivered to the dialer. |
| 5 | Overwrite | Contact overwritten during upload. |
| 6 | List Stopped | Contact from a list that is stopped. |
| 7 | Closed Through Managed Contacts or Flushed | Contact closed using the Manage Contact functionality / flushed contact. |
| 8 | Contact Stopped and Closed | Contact stopped and closed, will not be delivered to the dialer. |
| 9 | Contact Scrubbed | Contact from a list that is scrubbed. |
| 10 | Contact Moved to Other Campaign | Contact moved from one campaign to another chained contact. |
| 11 | Permanently Stopped | Contact permanently stopped which will not be delivered to the dialer. |
| 20 | Delivered Contact Stopped | A contact that is delivered to the dialer is stopped from |

| | | dialing. |
|---|---|---|
| 21 | Locked for PCB Delivery | Contact that is locked and will be delivered only for a personal callback (PCB) call.<br><br>**Note**: Personal callback feature is not applicable for this release. |
| 22 | Locked for CSS Contacts Delivery | Contact that is locked for delivery via a Contact Selection Strategy (CSS) schedule. |
| 23 | Locked for AEM Delivery | Contact that is locked for Agent-Executive Mapped delivery. |
| 24 | Locked by Reschedule to Reschedule Contact | Contact locked by the rescheduler to be delivered as rescheduled. |
| 25 | Locked by Reschedule to Close Contact | Contact locked by rescheduler to be closed. |
| 30 | Contact blocked by DNC | Contact blocked as Do Not Call contact. |
| 31 | Contact blocked by NDNC | Contact blocked as National Do Not Call contact. |
| 32 | Contact Blocked by DNC Scrub | Contact blocked during the process of DNC scrub. |
| 33 | Contact blocked by Litigation | Contact blocked due to a litigation requirement. |
| 34 | Expired | Expired contact. |

**Actions**

Campaign Action to be taken, if any, from the following:

- **Edit** any property in the campaign.

- **Copy** creates a new campaign with all properties of the selected campaign (except Campaign Name) retained as is.

  **Note**: Whenever you duplicate a campaign, the application does not replicate the dialer settings. Users need to manually create the dialer settings in the campaign for a copied campaign.

  **Note**: For a copied campaign, using the same name as a deleted campaign is allowed, subject to a rider. The Historical data pertaining to the old campaign is deleted from the database when a new campaign is created using the same name as a deleted campaign.

- **Stop** (or **start**) the campaign. All contacts, except active delivered contacts, are closed in the dialer. The status for such contacts is changed to Open in the application.

- **Flush** closes all pending contacts that are available in the dial list.

  **Note**: The contacts that are active in the dialer are not flushed.

- **Delete** a campaign.

**Page Actions**

An **Actions** button panel at the top left of the page above the headers is provided to perform various actions. This button is displayed only if an administrator has configured this to be displayed.

**Note**: Multiple campaign selection works only for the active page and not for campaigns across pages.

**Note**: If you select multiple campaigns, you can use only the Start and Stop buttons, as applicable. The whole palette of buttons is available if you select a single campaign.

- **Edit** any property in the campaign.

- **Copy** creates a new campaign with all properties of the selected campaign (except Campaign Name) retained as is.

  **Note**: For a copied campaign, using the same name as a deleted campaign is allowed, subject to a rider. The Historical data pertaining to the old campaign is deleted from the database (during the LCMReportingService end-of-day operation) when a new campaign is created using the same name as a deleted campaign. We advise you to use this after exercising due care, since this results in loss of historical data.

- **Start** the campaign.

- **Stop** the campaign.

- **Flush** closes all available pending contacts in the dial list.

  **Note**: The contacts that are active in the dialer's cache are not flushed.

- **Delete** a campaign.

**Sort and Search**

The Campaign listing data can be sorted by any column. Click a column header to sort the data by ascending order of the column. You can use the **Search box** at the top right of the Campaign listing page to search and fetch the required data.

# Create Campaign

## Campaign Details

To create a new campaign, click **Add Campaign** located at the bottom right corner of the screen. You can provide basic campaign details in this section.

The **Campaign Details** screen appears with the following details:

1. Enter a **Campaign Name**.
2. Enter a **Campaign Description**.
3. Select a **Category** from the dropdown list. This field is optional.

**Note**: If you do not have campaign category that applies to this campaign, you can click the **Campaign Category** button to create a new category. Refer **Create Campaign Category** for more information.

4. Select a **Business Outcome Group** from the dropdown list.

    **Note** : If you do not have any business group that applies to this campaign, click the **Create Business Outcome** button and add a new business outcome group. Refer **Business Outcome** for more information.

5. Select a **Date Range** for this campaign. The campaign operates between the start date and end date selected in this range; both days are inclusive.

6. Select a **Time Range** for this campaign. The campaign operates on all days (in the selected date range) between the selected times.

7. Select a **TimeZone** for this campaign. The application is designed to work in multiple timezones.

    **Note**: If you do not have a timezone that applies to this campaign, click the **Create Timezone** button and create a new timezone. Refer **TimeZone** for more information.

    The application can be used at various locations to run campaigns. These locations can be scattered across different continents or even different locations in the same continent. Being far apart, the campaigns may need to run in the working hours of each specific location. The application is designed to work in multiple time zones.

    The various locations across the world are divided into time zones based on the longitudes they are situated in. The application has a provision where system-wide time zones can be configured.

    This time zone is used as one of the options to associate contact's timezone. Some other elements that the application uses to determine contacts' time zones are the Zip Code, Area Code, State, etc.

8. Select a **Time Zone Use Type** for the campaign. There are three options you can choose from:

    **None**: This option takes the Time Zone for this campaign as selected in Time Zones.

    **Inherited**: This option takes the Time Zone as selected in the **Campaign Group**.

    **Override**: This option overrides, for this campaign only, Start and End times configured for the time zones in this Campaign Group. The start and end times for the group are displayed when you click the **Load Default** button.

    **Note**: Time Zone Use Type is not available when creating a new campaign. It is available only when editing an existing campaign.

9. Select the number of days from **Time to Live(days)** counter. **Time to Live** is the number of days that the contacts uploaded, via the auto upload feature.

10. Turn the **Business Days** switch **ON** to have the application calculate the Time to Live only using Business Days.

11. Click **Next** to complete the screen and navigate to the **Campaign Group** wizard.

## Campaign Group

This section allows you to perform integration with the campaign of the partner product ( Dialer specific) or with the Queue (non-dialer specific) to fetch the details.

### Group Selection

Select a campaign group type from Dedicated Campaign Group, Shared List and Accelerated Dialing.

1. If **Dedicated Campaign Group** is selected, select a **Group** from the dropdown.

2. If **Shared List** campaign is selected, it hides the **Group** option. The campaign group is decided when we create a CSS condition for the particular shared list campaign.

   **Note**: Contact Cisco CSM to enable this configuration.

3. If **Accelerated Dialing** is selected, perform the steps mentioned in the Accelerated Dialing.

   **Note**: Contact Cisco CSM to enable this configuration.

4. Navigate to the **Contact Strategy** section.

## Contact Strategy

A contact strategy is the calculated approach in building relationship with the customers to have an effective campaign management.

Select a **Contact Strategy** for the campaign.

The following options are available:

**Simple**: A simple strategy is easily configurable, and just moves on calling from one configured mode to another in a cycle. The cycle is repeated till the configured number of cycles are completed. It serves its limited purpose in certain types of campaigns that do not require any advanced contact handling methodology.

**Advance**: An advanced strategy can be configured and used for more elaborate calling strategies like mode-level retries, transition windows, and different calling windows for modes. This type of strategy leverages the maximum out of the application to dial out every uploaded contact.

## Simple

By default, the **Simple** contact strategy option is selected for a campaign.

1. Select an appropriate Contact Strategy for this campaign from the dropdown list.

   **Note**: If you do not have a contact strategy that applies to this contact, click **Create Contact Strategy** to create a new strategy. Refer **Create Contact Strategy** for more information.

2. **Global Retry** - Use the slider or enter the required value in the number panel. This option enables you to provide the maximum number of retries to dial out each contact in the campaign.

3. **Daily Retry** - Use the slider or enter the required value in the number panel. This option enables you to provide the maximum number of retries to dial out each contact in the campaign.

4. **Cycle Retry** - Use the slider or enter the required value in the number panel. This is the number of cycles that the contact strategy operates before closing the contact.

5. Select a **Cycle Retry Interval**. This is the interval between one cycle of retries and the next. Enter the required values in its respective boxes under **Day**, **Hrs** and **Min**.

### Callback Strategy

**Note**: Callback feature is not supported in the current release. This feature is planned for a future release.

Callback strategy is used to reschedule callback contacts. For example, when the dialer attempts to reach a customer at a requested time and the attempt fails, the system applies the Callback strategy rule.

There are two types of Callbacks. **Personal Callback** is when a callback is routed to the same agent who handled the original call; **Normal Callback** is when a callback is routed to any available agent.

6. Select an appropriate Callback strategy for this campaign from the dropdown list.

   **Note**: If you do not have a Callback Strategy that applies to this contact, click **Create Callback Strategy** to create a new strategy. Refer **Create Callback Strategy** for more information.

7. **Reset Daily and Global Retries** - Turn the switch **ON** if all you want the Global and Daily Retry counts to be reset to zero on moving a contact to Callback.

8. **Callback Retry** - Use the slider or enter the value in the number panel. This option enables you to provide the maximum number of retries to callback each contact in the campaign.

9. Select the **PCB to NCB reset** button, if required.

   **Note**: A contact marked as Personal Callback contact can be converted to a regular callback contact under certain circumstances like repeated failure to reach the specified agent. To avoid not reaching the contact at all, this is converted to regular callback to reach any other available agent.

   Available options for **Retries Type** are given below:

a.  **Retries**: To configure the number of attempts after which a Personal Callback becomes a Normal Callback.

b.  **Duration**: The duration in Days, Hours, and Minutes after which a Personal Callback becomes a Normal Callback if the dialed call does not reach the assigned agent due to some reason.

10. Use the number panel to set the number **Attempts to reach Agent** - the application makes number of attempts to reach an agent before converting a Personal callback to a Normal callback.

11. Click **Next** to complete the screen and navigate to the Other Options wizard.

**Advance**

Select **Advance** contact strategy option for the campaign.

1.  Select an appropriate Contact Strategy for this campaign from the dropdown list.

    **Note**: If you do not have a contact strategy that applies to this contact, click Create Contact Strategy to create a new strategy. Refer **Create Contact Strategy** for more information.

2.  **Global Retry** - Use the slider or enter the required value in the number panel. This option enables you to provide the maximum number of retries to dial out each contact in the campaign.

3.  **Daily Retry** - Use the slider or enter the required value in the number panel. This option enables you to provide the maximum number of retries to dial out each contact in the campaign.

4.  **Close Daily Retries** - Turn the switch **ON** to close the contact once the daily retry limit is reached.

5.  **Transition Window** - Turn the switch **ON** to apply this feature to the campaign. Transition Window offers the ability to limit the number of attempts for each mode across a defined duration threshold.

6.  **Transition Duration Days** - Use the slider or enter the required value in the number panel to keep count of the attempts.

7.  **Transition Attempts** - Use the slider or enter the required value in the number panel to select the transition attempts.

# Configuration Options

This section allows you to perform configurations with respect to the campaign.

1.  If this is an Email campaign, select an **Email Server** for the campaign.

    **Note**: Currently, this feature is not supported in Webex Contact Center.

2. If this is an SMS campaign, select an **SMS Server** for the campaign. Click **Create SMS Server Configuration** if you do not added an SMS Server. Refer **SMS** for more information.

    **Note**: Currently, this feature is not supported in Webex Contact Center.

3. To engage a Chat bot for 2-way SMS communication, select one from the ChatBot Account dropdown list. Click **Add ChatBot Credentials** if you do not added chatbot credentials. Refer **ChatBot Credentials** for more information.

    **Note**: Currently, this feature is not supported in Webex Contact Center.

4. Set a threshold for Emails in the **Email Threshold** field.

    **Note**: Currently, this feature is not supported in Webex Contact Center.

5. Enter a **Prefix**. A Prefix is the string prefixed to the uploaded contacts at the time of delivery to the dialer.

6. Enter a **Suffix**. A Suffix is the string suffixed to the uploaded contacts at the time of delivery to the dialer.

7. Turn the **Identity Authentication** switch **ON** to screen the contacts for identity authentication.

    **Note**: Contact Cisco CSM to enable this configuration.

    The Identity Authentication feature filters the contacts to identify the valid ones that can be dialed out. It also allows to choose to dial out the contacts that have failed the availability validation.

    When the Identity Authentication switch is turned **ON**, the following things occurs:

    a. The **Allow Invalid Device ID** switch appears. Turn this switch **ON** to disable the validation process for contacts with no Device ID and continue uploading the same to the campaign.

    b. The **Identity Authentication** dropdown gets enabled. Click **Identity Authentication** that is present along the dropdown to create one. Refer **Identity Authentication** for more information.

8. Turn the **Chaining** switch **ON**, if you want the contacts of this campaign to be chained to other campaigns. Refer **Chaining** for more information.

9. Turn the **PEWC** switch **ON**, if you want PEWC screening for contacts enabled for this campaign.

    PEWC is **Prior Express Written Consent**. This compliance mandates that telemarketers obtain the prior express written consent of the called party for auto-dialed or prerecorded telemarketing calls to wireless numbers and prerecorded calls to residential landlines.

10. Turn the **Block Area/Zipcode** switch **ON** to avoid dialing the contacts belonging to those **Area/Zip Code** that are blocked for their respective duration. To know more, see **Area/Zip Code.**

11. Turn the **DNC** switch **ON**, if you want DNC screening for contacts enabled for this campaign.

    DNC is **Do Not Call**. Certain phone users mark themselves as DNC customers to avoid telemarketing calls. No person or organization shall make an unsolicited call or send an unsolicited SMS to a phone that is listed as DNC. The DNC list is maintained within an organization.

12. Turn the **NDNC** switch **ON**, if you want NDNC screening for contacts enabled for this campaign.

    NDNC is **Do Not Call** (registry) at a national level. If a number is registered under NDNC (telecom-regulatory tagged as DNC), then no person or any organization in the registered country (where the number is registered) shall make an unsolicited call or send an unsolicited SMS.

13. To activate the Litigator functionality, turn the **Litigator** switch **ON**. The **Litigator** feature allows the administrator to perform compliance checks during data upload. It ensures that legal requirements are met when uploading and delivering contacts.

14. To activate the CPT functionality[1], turn the **CPT** switch **ON**. Select the **Mode Value** or **Unique Identifier** from dropdown list. The Unique Identifier are created in Global Business Parameters.

    **Note**: Contact Cisco CSM to enable this configuration.

15. If you have a pre-call script to run before every call, turn the **Precall Script** switch **ON**.

    A **precall** script can be used to integrate with an external application or database to take the final decision on dialing a contact. This ideally happens before delivering the contacts to dialer. Choose from the following options:

    a. **Library**: Select a script from the script library.

    b. **VBScript**: Execute a custom-written script.

16. If you have a post-call script to run after every call, turn the **Postcall Script** switch **ON**.

    A **Post-call** scripts can be used to perform any operation after dialing, like validating the outcome received from the dialer and customizing the reschedule behavior, or any third-party integration like updating the CRM status about the call result, etc.

    Post call script allows you to customize the product as detailed below:

    a. **Before Reschedule**: This is executed before rescheduling the contact (it can change various parameters that influence the reschedule logic through custom logic).

    b. **After Reschedule**: After rescheduling the contact (it can use the reschedule information to further enrich or change the strategy and use the information to update external platforms).

    c. **Both**: The script is executed both Before Reschedule and After Reschedule. For more information, refer to "Server Script" on page 66 for complete details.

17. If you require contacts to be delivered via the **Enhanced Greenzone** functionality, turn the switch **ON**.

    **Enhanced Greenzone** is a feature to ensure contacts are delivered ONLY based on possible time zones and state rules fetched from the area codes and zip codes of all modes for the contact. Note that if your contact has three modes, the application checks if all the three modes of the contact are dialable before delivering to the dialer.

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[1]It allows user to check customer preferred time during data upload based on the selected parameters. You must activate CPT on both the Campaign and State Law pages to activate this feature.

When the switch is enabled, Enhanced Greenzone factors all numbers and zip codes uploaded to calculate Greenzone. If 10 numbers are uploaded, then 20 time zones would be determined for each phone number's area code and zip code. If 2 contact level Zip Code (primary and secondary zip codes) are enabled, that adds 2 more time zones making it 22 time zones in all to check. The application checks all these time zones and delivers the contact only when all the 22 time zones have a permissible callable window.

Likewise, if State Law is enabled, 22 States related to these time zones would be identified. The Enhanced Greenzone feature validates the Start and End Times of all the 22 states, merge the compliance, and deliver the contact in the intersecting permissible calling window.

**Note**: Contact Cisco CSM to enable this configuration.

**Note**: When contacts fail in Enhanced Greenzone, the failed contacts are rescheduled again.

18. If your contacts have to be dialed in conformance with a **State Law,** turn the switch **ON**.

    Various geographical regions like states, countries, etc. have laws that regulate contact center operations. These laws can be configured at the application level and chosen as applicable to campaigns. See **State Law**.

    State can be identified either by State Code, Zip Code, or Area Code. You may choose any one of these based on the data availability:

    a. **State**: The state law compliance for this campaign is as per the State configured in System-application wide configuration.

    b. **Zip Code**: The state law compliance for this campaign is as per the zip code that is configured in System. The state law of the state belonging to this zip code and/or additional zip code is applied.

    c. **Area Code**: The state law compliance for this campaign is as per the area code that is configured in System. The state law of the state belonging to either this area code and/or mode-level zip code is applied.

    d. **Area-Zip Code**: The state law compliance for this campaign is as per the area code that is configured in System. The state belonging to any one of area code and/or zip code and/or additional zip code and/or mode-level zip code.

19. **State Law with Enhanced Greenzone**: You can enable both State Law and Enhanced Greenzone.

    A contact can be identified as belonging to multiple timezones based on area code, zip code, additional zip code, and mode-level zip code depending on configured State (s). It is possible that a single contact may need to be checked for a safe dialable time for multiple parameters listed above, including State-level permissible time for dialing. Enabling the Greenzone button at the campaign level ensures that the application checks for all these parameters before delivering the contact for dialing.

    **Note**: State Law follow type is not applicable for Enhanced Greenzone.

20. Select the appropriate **State Law Group** applicable for this campaign.

State law group allows the administrator to define individual state and its association with Zip code and/or Area code and finally group these states together as a **State Law Group** with the definition of callable time and holidays. When the application determines more than one state based on the zip and area codes, the priority set in **System > State Law Group** applies. See **State Law Group**.

21. Click the **Save** button to save the campaign. Proceed to configure the various requirements for the newly created campaign.

## Configure Campaign

After creating the campaign, there are various other aspects that you have to configure to get the campaign working as you want it to. This section deals with configuring the following elements:

1. Business Parameters
2. AI Configuration

   **Note**: Contact Cisco CSM to enable this configuration.
3. CSS
4. Chaining
5. Contact Lists
6. Manage Contacts
7. Schedule
8. IVR Template Editor

   **Note**: Currently, this feature is not supported in Webex Contact Center.
9. Email Template Editor

   **Note**: Currently, this feature is not supported in Webex Contact Center.
10. SMS Template Editor

    **Note**: Currently, this feature is not supported in Webex Contact Center.
11. Other Configuration

Each of the above menu options can be placed as a **Quick Link** on the application **Home** page. Click the required **Link** and the page is now available for view/edit on a single click directly from the application home page.

### Business Parameters

Business Parameter is a business-specific data that can be used for various purpose. Some uses are:

1. Associate data to contacts at the time of upload.

2. Define custom conditions for CSS to define a dialing strategy to prioritize a contact.

3. Query the contacts based on these parameters and manage them in the **Manage Contacts** functionality.

4. Populate these parameters on agent desktop as screen pop during a call.

You can create a total of 25 business parameters. These 25 include any parameters that you use from any dialer. For example, if you are using 4 custom fields in dialer's import rule, you can create an additional 21 business parameters.

 **Note**: By default, all fields defined in the import rule table are created under business parameters.

**Creating Business Parameter**

1. Click **Add** to add a business parameter.

2. Select a **Business Parameter Name** from the dropdown. It lists down the parameters configured in Global Business Parameters. To add a new parameter, see Global Business Parameters.

3. From the **Data Type** dropdown list, select a **Data Type** for this business parameter. Available options are:

    a. **Number**, for numeric data.

    b. **Float**, for numbers with decimal values.

    c. **DateTime**, for values that represent date and time. If you select this data type, select a desired date format in the **Format** field.

    d. **String**, for alphanumeric data that includes any character.

4. Turn the **Large Data** switch **ON** to define this business parameter as a bulk field. Business Parameters defined as bulk fields have no restriction on the field length for data that goes in as business parameter.

5. Enter the number of characters allowed for data in the **Character Length** column.

6. Turn the **Agent View** switch **ON** to show this business parameters to the agents on their desktop.

    **Note**: Currently, this feature is not supported in Webex Contact Center.

7. Turn the **Agent View/Edit** switch **ON** to allow agents to edit.

    **Note**: Currently, this feature is not supported in Webex Contact Center.

8. Turn the **DNC** switch **ON**, if required. This allows the application to determine that a call to a contact based on this business field is subjected to Do Not Contact (DNC) rules.

9. Select a **Customer Master** field from the dropdown that is appropriate with the Business Parameter Name.

**Note**: The **Customer Master** field is enabled only when at least either of the P2P and BTTC switches is turned ON in the Configuration Options section in the Configure Campaign page. Refer Configuring Campaign for more information.

10. Click **Save** to complete creating a business field or click **Cancel** to revert with no information saved.

    **Note**: The application does not index business fields' data because the usage of the 26 business fields (including the Unique Identifier) is customer-dependent and not uniform across customers. We recommend that users take help from Support to create additional indexes based on business requirements.

11. The number of business fields created and the number available are displayed in the top right corner of the grid.

12. You can also create a unique identifier. Ideally, there may be identical business fields across campaigns that may be required to be grouped for various purposes.

13. For example, Customer ID can be a business field across campaigns for which grouping is necessary in reports. However, Customer ID can be the first business field in Campaign A; sixth in Campaign B; and tenth in Campaign C - this makes grouping a challenging task. Instead, you can create this business field as a Unique Identifier field and group data from the Unique Identifier field. Follow the steps listed below to create a Unique Identifier.

14. Click the **Add Unique Identifier** button to add a unique identifier.

15. Enter the required details and click **Save**.

    **Note**: The application does not index business fields' data because the usage of the 26 business fields (including the Unique Identifier) is customer-dependent and not uniform across customers. We recommend that users take help from Support to create additional indexes based on business requirements.

**Campaign Field**

Campaign Fields are static fields, which can be used for BTTC feature (Refer AI Configuration). Application allows to set five Campaign Fields. Navigate to **Campaign Fields** section.

Perform the following steps to set the Campaign Fields.

1. Access the **Campaign Field** tab under the **Business Parameter** module.

2. Enter the Campaign Field parameter name in the **Key** field.

3. Enter a corresponding value in the **Value** field.

4. Click the **Save** button to save the details.

5. Click the **Cancel** button to cancel the details.

6. Click the **Delete** button to delete the details.

## AI Configuration

**Note**: Contact Cisco CSM to enable this configuration.

The AI Configuration feature allows administrators to use in-built artificial intelligence to make predictions based on historical data. The availability of historical data leads to more accurate predictions.

 **Note**: To check if you have license, you can click the **License** module and check whether **RPCO(Right Party Connect Optimizer)**shows enabled, else the AI Configuration tab is disabled.

The **AI Configuration** module allows to access the following predictive AI features.

There are two options in AI Configuration:

1. Best Time To Call (BTTC)
2. Right Time To Contact (RTC)

### Best Time to Contact

BTTC is an artificial intelligence model that helps to reduce the call retries and maximize the successful call connections by:

1. Predicting the best time slot during which a customer can be approached for the day.
2. Recommending the right phone number to be used during the best time slot.

Perform the following steps:

Turn **ON** the BTTC switch to enable the Best Time To Call mode for the contacts.

Use the slider or provide a value for **Contact Threshold**. Click **Save**. A confirmation message appears.

The artificial intelligence in the application determines the probability of successfully reaching the right contact. This probability is expressed in percentage. Higher the percentage, better the chances of successful connect.

The contacts from the lead list are arranged in the descending order of the success percentage. The application selects contacts that are assigned with the success probability as selected, or higher.

For example, if the administrator selects 60% as the cut-off threshold value, the contacts that have the probability percentage of 60% or higher are dialed first. The dialing happens in the descending order of probability percentage at the scheduled time.

## Threshold Calculator

The application provides administrators with a tool called **Threshold Calculator**. Use the slider or enter a **Probability Threshold** and click the **CALCULATE** button. This tool calculates the number of contacts for the given percentage. The records that match the prediction rate at the campaign level are populated based on the calculation done by the application.

The application auto populates the following fields based on the given probability threshold value.

1. **Total Available Records** - The total number of records available in the campaign.

2. **Predicted Dialable Records** - The number of dialable records available in the campaign, predicted based on the probability threshold value.

3. **Predicted Positive Connections** - The number of records predicted as positive connections, from the predicted dialable records.

4. **Predicted Penetration Rate** - The column shows how well the filter captures the contacts that will connect.

5. **Predicted Connect Accuracy** - The column shows how accurately the filter includes contacts that will connect and removes contacts that will not connect.

6. **Predicted Precision Accuracy** - The column shows how precise the filter captures the success rate/-connect rate of the selected contacts.

**Right Person to Contact**

Administrators can also select the **Right Person To Contact** option by turning the toggle icon **ON**. This option automatically disables BTTC and all the connected fields.

If RPC is selected, the application dials out all the contacts from the lead list in the descending order without any cut-off threshold restrictions.

## Chaining

Campaign Chaining is a feature using which contacts can be chained from one campaign to another campaign in runtime. In runtime, based on agent-set dispositions, the chaining process happens. Users can configure different target campaigns for different outcomes in the source campaign.

Chaining can be achieved in one of the following methods:

**Move** - The contact is chained to target campaign when it is being closed in the source campaign. When a contact is closed after the configured global retries is achieved and the chaining configuration for this outcome matches, the contact is chained via the move type to the target campaign. This is now a fresh contact in the target campaign.

**Copy** - The contact is chained to target campaign whenever the chaining-configured outcome for the call is received. When an agent sets an outcome and this outcome matches the chaining configuration, the contact is chained to the target campaign in the first attempt. If there are more retries, the source campaign dials out the contact again. This may result in the agent setting the same outcome a second time - the contact is chained again to the target campaign. This goes on until the source campaign runs out of retries.

 **Note**: There is no validation for duplicate contacts in the destination campaign. In the event of a contact receiving the configured outcome multiple times, it is chained multiple times in the target campaign.

Configure the chaining rules in application for contacts to be chained from one campaign to another.

**Mapping**

1. In the **Name** field, enter a **Mapping Name** for this chaining configuration.

2. From the **Target Campaign** dropdown list, select any one to chain contacts from this campaign.

3. The **Modes** mapped to the target campaign are shown in the **Target Modes** field. For each of these modes, the modes of the source campaign are shown in the dropdown list. Select a mode from the source campaign to map to a mode in the target campaign.

4. The **Target Business Fields** shows all the **Business Fields** mapped in the **Target Campaign**; the **Source Business Fields** are shown in a dropdown list. Map each **Target Business Field** to one **Source Business Field**.

 **Note**: If the Modes and the Business Fields are common in both Source and Target Campaigns, the fields are automatically populated.

5. Turn the **Fresh Contacts** switch **ON** if you want the contact to be marked as fresh in the target campaign. Selecting this means the contact is sent to the dialer immediately. (OR)

6. If the Fresh Contacts is **OFF**, then it is treated as contact to be rescheduled in the Target campaign.

7. Complete the **Reschedule After** field by selecting the **Days**, **Hours**, and **Minutes** from the number panel. This is the time at which the contact is dialed next, in the target campaign, after successful campaign chaining.

8. Turn the **Retain Global Retries** switch **ON** to retain the number of contact-level global retries in the chained campaign. In the **OFF** position, the Global Retries count is initialized to zero in the chained campaign.

**Note**: The Retain Daily Retries switch is active only if the Retain Global Retries switch is turned ON.

9. Turn the **Retain Daily Retries** switch **ON** to retain the number of contact-level daily retries in the chained campaign. In the **OFF** position, the Daily Retries count is initialized to zero in the chained campaign.

10. Click the **Save** button to complete the mapping.

**Outcomes**

Navigate to the **Outcomes** section to select the **Outcomes** that should initiate the chaining for this campaign. Follow the steps listed below:

1. From the **Saved Mappings** list in the left pane, select a mapping.

2. You can either select the business outcome or telephony outcome, or both, that trigger the configured chaining.

3. All the **Business Outcome Groups** are populated in the **Group Name** dropdown list. Select a **Business Outcome Group**.

4. All the outcomes under this **Business Outcome Group** are populated. Select the required **Business Outcomes** for chaining.

5. From the **Telephony Outcome** pane, first select the **Mode** from the dropdown list. All the Modes available in the source campaign are displayed for selection.

6. All the **Call Strategies** that use the selected **Mode** are now displayed in the **Strategy Name** drop-down list.

7. All the **Telephony Outcomes** for the selected **Mode** and **Contact Strategy** pair are listed. Select the **Telephony Outcomes** for chaining.

   **Note**: Contacts with Callback telephony outcome cannot be chained to other campaigns.

8. Click the **Save** button to complete the chaining.

   The **Mapped Outcomes** tab contains all the mapped **Business** and **Telephony** outcomes. Select either **Business Outcome** or **Telephony Outcome** under the **Mapped Outcomes** tab to see all chaining mappings.

   Click the **Edit** button to edit any chained mapping.

   The Target Campaigns have a List ID numbered as -1. The incoming chained contacts from other campaigns are added to this list. Each Target Campaign has only one list (List ID -1) for incoming chained contacts from other campaigns.

## Contact Selection Strategy

A Contact Selection Strategy (CSS) defines how you prioritize your contacts for dialing in a campaign. For example, you may have three categories of credit cardholders on your campaign, Platinum, Gold, and Silver. By configuring a CSS, you can ensure that your application pushes a specific percentage or number of Platinum contacts and/or Gold and Silver contacts based on the priority.

Navigate to **CSS** and the **Contact Selection Strategy** screen appears.

### Creating a New CSS Group

Follow the instructions to create a new **Contact Selection Strategy** group:

1. Enter a new **CSS Group Name**.

2. Enter a **Condition Name**.This is a mandatory field. You cannot use special characters in the name, except underscore, dash, and at (_, -, and @, respectively) in the Condition Name.

3. Navigate to the **CSS Conditions** section.

4. You can create conditions either using the **Build Conditions** or the**Write Conditions** option. Enable the required switch based on your preference.

**Creating a CSS Condition - Build Conditions**

Click the **Add New** button to add a new CSS condition. Complete the following fields:

1. Enter a new **CSS Group Name**.

2. Turn the **Advanced Builder** switch **ON** if you want to build an **Advanced CSS Condition**.

   **Note**: An Advanced Builder requires meticulous condition building nested conditions manually. Any incorrect placement of brackets may result in the CSS condition selecting wrong and unintended contacts for delivery to the dialer. On the other hand, if the Advanced Builder switch is OFF, you can add conditions in groups, with pre-selected and/or conditions.

3. The **Advanced Builder** screen is shown below.

4. Enter an open bracket - ( - in the first cell.

5. From the **System Fields / Business Fields** dropdown list, select an appropriate item. To know more, click here.

6. Select a comparison operator from the options listed below- this is the condition that the field should satisfy for a contact to be selected. The parameters available are:

   a. is exactly equal to

   b. is less than

   c. is less than or equal to

   d. is greater than

   e. is greater than or equal to

   f. is not equal to

   g. Like

   h. in

   i. Not in

   j. Not Like

7. Enter a value that this condition should meet for the contact to be selected for delivery.

8. Close the bracket.

9. Click the **Add** button to add another condition.

10. Complete **Steps 4** through **9**. Add as many conditions you may require for your CSS.

11. After you are done with conditions, click **Save** to complete

12. If you are not using the Advanced Builder, use the simple builder as shown in the screen below:

13. From the **System Fields / Business Fields** dropdown list, select an appropriate item. See step 5 for more details.

**Note**: If you select System Fields List ID or Global List ID, a pop up allows you to select the appropriate list from the available lists.

14. Select a compare option - this is the condition that the field should satisfy for a contact to be selected. Some comparison parameters for your condition could be > (greater than), < (lesser than), = (equals), etc.

15. Enter a value that this condition should meet for the contact to be selected for delivery.

16. Close the bracket.

17. Click the **Add** button to add another condition.

18. In the new line, select either **AND** or **OR** from the decision dropdown list.

19. You can keep adding more such condition groups. Click **Save** when you are done.

20. If you want to add more groups, select the **Add** button from the **Group Action** buttons.

21. Repeat **Steps 12** through **17**.

22. Navigate to the **Order By** section.

**Fields**:

| Fields | Description |
|---|---|
| Max Retries | This is the current incremented value for the maximum number of retries that can be made for dialing each contact in the campaign. |
| Daily Retries | This is the current incremented value for the maximum number of retries that can be made for dialing each contact in a day for this campaign. |
| Cycle Retries | This is the current incremented value for the maximum number of retries that can be made in a dialing cycle. A cycle is a set of dialing attempts, once to all modes that a contact is uploaded with. For example, a contact is uploaded with three modes - Home, Work, and Mobile numbers. A dialing cycle is completed when the application dials all these modes (in the configured order) once each. |
| Email Retries | This is the current incremented value for the number of retries allowed for contacts to be delivered for email campaigns.<br><br>**Note**: Currently, this feature is not supported in Webex Contact Center. |
| SMS Retries | This is the current incremented value for the number of retries allowed for contacts to be delivered for SMS campaigns.<br><br>**Note**: Currently, this feature is not supported in Webex Contact Center. |
| Last Accessed | The contacts with the configured date and time of last access to be delivered as part of this CSS. |
| Priority | The priority assigned to the contacts that is to be accounted when delivering as per this CSS. |
| Lead Score | The Lead Score that is to be considered for delivering contacts are per this |

| | CSS. Lead Score helps in identifying the most prospective customer to be reached out from a campaign. This score can also be set at the time of upload or wrap up, while defining the business / telephony outcome. |
|---|---|
| CallStartTime | This is the call start time as set by the rescheduler. Calls that fall within the start time mentioned in this condition are selected for delivery. |
| CallEndTime | This is the call end time as set by the rescheduler. Calls that fall within the end time mentioned in this condition are selected for delivery. |
| ListID | The list ID that the contact belongs to. Contacts belonging to the ListIDs in this CSS condition are delivered. |
| CallType | The call type. |
| LastOutcome | The last outcome set for this contact. Contacts with the selected Last Outcome are delivered. |
| Global ListID | The Global List ID that this contact belongs to. Contacts belonging to the Global ListIDs in this CSS condition are delivered. |
| UserID | This the agent ID tagged to the contact. Calls are delivered to the dialer and are patched to the agent mentioned in this field. |
| Phone Number | The phone number of the contact to deliver as per this CSS. |
| Zone Name | The name of the time zone to which the contact belongs. |

**Creating a CSS Condition - Write Conditions**

1.  You can also use the **Write Conditions** option instead of using Simple or the Advanced condition builder.

2.  To start writing the CSS conditions, enable the **Write Conditions** switch. Note the following before you select the Write Conditions option:

    a.  The application validates only the syntax - does not allow you to save conditions with wrong syntax.

    b.  The application does not validate any fields. If the syntax is valid, and the query does not return any results, check and refine/rewrite the query.

3.  Begin your condition by opening a curly brace ({). The application pops up three items

    a.  System Fields

    b.  Business Parameters

    c.  Expression For more information, refer Expression Builder.

4.  All the System Fields listed in point 5 in Creating a CSS Condition - Build Conditions section are available for selection. The following fields are additionally available for the Write Conditions feature:

a. **ContactID** - The Contact ID generated by application.

b. **CallStartDate** - This is the call start date as set by the rescheduler. Calls that fall within the start date mentioned in this condition are selected for delivery.

c. **CallEndDate** - This is the call end date as set by the rescheduler. Calls that fall within the end date mentioned in this condition are selected for delivery.

d. **State** - The geographical state of the contact.

e. **ZipCode** - The zip code that the contact belongs to.

f. **AreaCode** - The area code that the contact belongs to.

g. **CreatedTime** - The date and time the contact was added / rescheduled. Contacts with this created time are selected for delivery if this is part of the condition.

h. **SecondaryZipCode** - The contact's secondary zip code, if mapped.

5. Click **Save** to save the query.

**Note**: You can use the **Query** button from the Actions panel to read the condition that you have created using the Write Conditions feature. You cannot, however, edit the query. To edit a query, use the Edit button on the Actions panel.

**Order By**

1. The **Order By** section decides the order in which you want the matched contacts for the defined conditions to be delivered to the dialer - ascending or descending. The **Order By** screen section is shown below.

2. From the **System Fields / Business Field**s dropdown list, select an appropriate item. To know more, click here.

3. From the Sort dropdown list, select **Asc** or **Desc** for Ascending or Descending sort, respectively.

4. To add more sort orders, click the **Add** button.

5. When you are done with sort orders, click **Save** to complete CSS conditions. The saved condition is listed below the System Conditions.

6. Click the **Save & Flush** button to save the changes and flush (close) all contacts on the dialer and reopen those on the application.

   **Note**:You can skip creating conditions and select any Default CSS condition.

7. The saved condition is listed below the System Conditions. Use the **CSS Condition Action** button to perform the following actions:

   a. **Edit** the CSS condition. When you edit a CSS condition, the screen is similar to the Create New CSS Group. Make the necessary changes and click **Save** to complete editing.

b. **Delete** the CSS condition.

   c. **Show Contacts** matching the CSS condition.

8. The contacts are displayed.

9. After the contacts matching the CSS condition are displayed, select specific contacts or use one of the following options:

   a. Select the **Select All** checkbox to select the contacts populated on the page.

   b. Select the **Global Select** checkbox to select all the contacts across pages.

10. Click the **Actions** button. Perform one of the following operations on the selected contacts:

   a. Select **Revise Reschedule Time** to reschedule the contact to a later date and/or time. Specify the **Start Time** and **End Time** to reschedule the contact in this window. Click **Reschedule Contacts** to complete action.

   b. Select **Reset as Fresh Contact** - this action resets the contact as Fresh Contact. Click **Reschedule Contacts** to complete action.

   c. Select **Reopen Contacts** to reopen the contact for dialing. Click **Reschedule Contacts** to complete action.

   **Note**: If you select the **Undo business field values updated by agents** checkbox, the application discards the updates to business field values, if any, made by the agents during their interactions, and the application reverts to the business field values at the time of contact upload.

   For example, contact A is uploaded with business field values for mobile number and Customer ID (123456). During agent interaction, the customer requests change in mobile number and customer ID (to 345678), and the agent updates the values. At the time of reopening this contact using the CSS conditions, you have the option of reverting to the original mobile number and customer ID (123456) by selecting this checkbox.

   **Note**: This option is not applicable for Block Contacts and Close Contacts.
   1. Select **Block Contacts** to prevent the selected contacts from being dialed out by changing the contact status to Blocked.
   2. Select Close Contacts to close the selected contacts

**System Conditions**

There are five system CSS conditions that can be applied to a campaign, besides any conditions that you have created. An overview of the dialing pattern for these five default CSS conditions:

1. **Contact Priority Calls - New Contacts**: These are contacts that application has not delivered to the Cisco CCE dialer from the latest upload to the oldest upload. Effectively, these are Fresh Contacts with not a single dialing attempt made.

2. **Contact Priority Calls - Old Contacts**: These are contacts that have not been delivered to the Cisco CCE dialer from old uploads.

3. **Specific Moment:** Contacts that you have rescheduled to be dialed out at a specific moment.

4. **Specific Agent**: Contacts that have been tagged to be dialed out to reach a specific agent. This is also known as Account Executive Mapping (AEM).

   **Note**: Currently, this feature is not supported in *Webex Contact Center*.

5. **Specific Agent with Specific Moment**: Tagged contacts that have been rescheduled to be dialed out to reach a specific agent at a specific moment.

   **Note**: Currently, this feature is not supported in *Webex Contact Center*.

Any additional CSS conditions created are listed below the System Conditions. See Creating a CSS Condition - Build Conditions and Order By for details on creating additional CSS conditions.

### Copying CSS Conditions

You can also copy existing CSS conditions - both condition groups and individual CSS conditions.

1. **Copy CSS Group** - Click the **Copy** button on the CSS Group pane on the left.

   a. Enter a name for the cloned **CSS Group** and click **Save** to complete.

2. **Copy CSS Condition** - Click the **Copy** button on the CSS condition section pane on the right. The condition page appears with the required details.

   a. Enter a name for the cloned CSS Condition.

   b. If any changes are required, follow the steps listed in the following sections and make the changes: Creating a CSS Condition - Build Conditions, Order By, and System Conditions.

3. Click **Save** when complete.

## Contact List

The **Contact Lists** page shows all the contact lists that you have uploaded to the campaign. The **Contact Lists** page also helps you upload contacts to a campaign. Contacts can be uploaded from flat files with pre-defined separators, files with comma-separated values, database tables, etc.

The grid contains a listing of all the contact lists with the following details:

1. **List ID** - The List ID generated by the application for this list.

2. **Global List ID** - If this list is part of a Global List, the Global List ID is displayed here.

3. **Start Time** - This Start Time for the list.

   **Note**: Click the **Info** button to see the remaining period that the list will be executing. This button also provides information on how to extend list validity.

4. **Records Available** - The number of contacts uploaded to the campaign through this list.

5. **Records Pending** - The number of contacts pending in list, eligible for delivery to the dialer.

6. **Status** - The list status are displayed below.

   a. **Active** - The list is active. Contacts uploaded from this list are delivered to the dialer.

   b. **Stopped** - The list is stopped. A stopped list has contacts marked with a different status, and ensures these contacts are not delivered to the dialer.

   c. **StoppedAndClosed** - This status indicates the list is stopped and contacts uploaded through this list are closed. The contacts can be reopened using the Manage Contacts functionality.

   d. **PermanentStop** - This status indicates that contacts uploaded from this list are deleted. Once deleted, the uploaded contacts cannot be reopened.

   e. **Upload in Progress** - When your contact file contains a large number of contacts for upload, these are split in batches and uploaded. Till the upload completes, it shows the status Upload in Progress, with the percentage of upload completed.

   f. **Upload Failed** - When the contact upload fails for any reason, the Upload Failed status is shown. The status bar shows the percentage of contacts uploaded as at the time of failure.

   **Note** : During the end-of-day (EOD) process, all upload-failed contacts are deleted.

**Contact Status Percentage**

The Contact Status Percentage is calculated using different formulas for Contact Statuses less than 6, and all other contact statuses. See Table for Contact Status Details.

**Table - Contact Status Details**

| Status | Name | Description |
|--------|------|-------------|
| 0 | Open | Open contact. |
| 1 | Closed | Closed contact. |
| 2 | Temporarily Locked | Contact temporarily locked, will not be delivered. |
| 3 | Upload in Progress | Contact in the midst of upload process |
| 4 | Delivered to Dialer | Contact delivered to the dialer. |
| 5 | Overwrite | Contact overwritten during upload |
| 6 | List Stopped | Contact from a list that is stopped. |
| 7 | Closed Through Managed Contacts or Flushed | Contact closed using the Manage Contact functionality / flushed contact |
| 8 | Contact Stopped | Contact stopped and closed, will not be delivered to the dialer. |

| | | |
|---|---|---|
| | and Closed | |
| 9 | Contact Scrubbed | Scrubbed contact. |
| 10 | Contact Moved to Other Campaign | Contact moved from one campaign to another - chained contact. |
| 11 | Permanently Stopped | Contact permanently stopped. Will not be delivered to the dialer. |
| 20 | Delivered Contact Stopped | A contact that is delivered to the dialer is stopped from dialing. |
| 21 | Locked for PCB Delivery | This column contains no data. |
| 22 | Locked for CSS Contacts Delivery | Contact that is locked for delivery via a Contact Selection Strategy (CSS) schedule. |
| 23 | Locked for AEM Delivery | Contact that is locked for Agent-Executive Mapped delivery. |
| 24 | Locked by Reschedule to Reschedule Contact | Contact locked by the rescheduler to be delivered as rescheduled. |
| 25 | Locked by Reschedule to Close Contact | Contact locked by rescheduler to be closed. |
| 30 | Contact blocked by DNC | Contact blocked as Do Not Call contact. |
| 31 | Contact blocked by NDNC | Contact blocked as National Do Not Call contact. |
| 32 | Contact Blocked by DNC Scrub | Contact blocked during the process of DNC scrub. |
| 33 | Contact blocked by Litigation | Contact blocked due to a litigation requirement. |
| 34 | Expired | Expired contact. |
| 40 | | This is a temporary contact status for compliance-failed records (failed due to CCB rule, mode timings, or CPT). |
| 41 | | This is a temporary contact status where contacts are already delivered using the same Unique ID or Mode value (phone number. The application waits for an updated call result. |

For contact status less than 6, the formula is

*CompletionPercentage = ((TotalRecordsAvailable - TotalRecordsPending) / TotalRecordsAvailable) * 100;*

For other contact statuses, the formula is *CompletionPercentage = (TotalRecordsPending / TotalRecordsAvailable) * 100;*

For both the above contact status percentage calculations, the components of the formula are calculated as below: *TotalRecordsAvailable is calculated based on CampaignID and ListID from the contact table.*

*TotalRecordsPending is calculated based on CampaignID, ListID, and Status from the contact table.*

**Actions**

Use the **Actions** buttons, from the panel in the last column, to perform the following actions on the contact lists:

1. **Start List** - Start contact delivery to the dialer. Contacts uploaded from this list are delivered to the dialer.

2. **Stop List** - Stop this list. Stopping this list marks all the uploaded contacts with a different status, and ensures these contacts are not delivered to the dialer.

3. **Close List** - This button closes the contacts uploaded from this list. The contacts can be reopened using the Manage Contacts functionality.

4. **Delete List** - This button deletes he contacts uploaded from this list. Once deleted, the uploaded contacts cannot be reopened.

5. **End Time** - Use this button to change the end time for this list. The end time cannot be changed to a date and time lesser than the current date and time.

Expand any list to see a detailed break up of contacts uploaded via this list.

The expanded portion contains the following details pertaining to the list:

**Contact** - This section contains the break up of contacts uploaded with the count for the following:

1. **Processed** - The number of contacts processed from this list.

2. **Uploaded** - The number of contacts uploaded from this list.

3. **Failed** - The number of contacts that failed to upload from this list.

4. **Duplicate** - The number of duplicate contacts from this list.

5. **Updated** - The number of contacts that updated existing records in the list.

**NDNC** - The count of National Do Not Call (NDNC) contacts and modes.

1. **Contacts** - The number of contacts marked NDNC from this list.

2. **Modes** - The number of modes marked NDNC from this list.

**Note** : It is possible to have different numbers for contacts and modes, since each contact can contain more than one mode.

**Corporate DNC** - The count of corporate Do Not Call (DNC) contacts and modes.

1. **Contacts** - The number of contacts marked DNC from this list.

2. **Modes** - The number of modes marked DNC from this list.

**Note** : It is possible to have different numbers for contacts and modes, since each contact can contain more than one mode.

**Compliance DNC** - The count of compliance Do Not Call (statutory DNC) contacts and modes.

1. **Contacts** - The number of contacts marked compliance DNC from this list.

2. **Modes** - The number of modes marked compliance DNC from this list.

**Note**: It is possible to have different numbers for contacts and modes, since each contact can contain more than one mode.

**Litigation**- The count of Litigation contacts and modes.

1. **Contacts** - The number of contacts marked Litigation from this list.

2. **Modes** - The number of modes marked Litigation from this list.

 **Note**: It is possible to have different numbers for contacts and modes, since each contact can contain more than one mode.

**Upload Details** - The following upload details pertaining to this list are populated in this section:

1. **Time** - The date and time the list was uploaded to the campaign.

2. **Type** - The upload type, Manual or Auto upload.

3. **Sub-Type** - The upload sub-type, New, Append, or Update.

4. **Mode Failed** - The number of contacts that were not uploaded due to failed modes.

5. **File Name** - The contact upload file name from which the contacts were uploaded.

6. **Error Records** - To check details of error records, if any, click the Download Now button. The application provides the details pertaining to error records. The Error Reason and all the Headers of the upload file are reproduced along with the error records, as a txt file.

**Scrubbed List**

The contact lists page has a tab named Scrubbed List. This tab contains details of contacts scrubbed from various uploaded contact lists.

For example, you have uploaded a list to scrub contacts and these contacts are scattered across various uploaded lists. All these contacts are scrubbed based on conditions in the scrub file, and the scrub details listed here. The details listed are:

1. **List ID** - The list ID generated for the scrubbed contact list. This is a continuation of the previous upload list ID, and does not begin from 1.

2. **Processed Time** - The date and time when the contacts in this list were scrubbed.

3. **Scrubbed Contacts** - The count of contacts scrubbed from an uploaded list.

4. Expand **Scrubbed Contacts** to see the list-wise details.

The **Scrubbed Contact Detail** drill down contains the List ID from which the contacts were originally uploaded and the number of contacts scrubbed from that list.

**Scrub Contacts**

Scrub is a feature that allows you to clear contacts in the database before you effect an upload. You can clear these contacts based on some conditions that you configure. To scrub contacts from a campaign, follow the steps listed below.

1.  Click the **Floating Action Button (FAB)**.

2.  Click **Scrub Contacts FAB** to upload contacts.

3.  There are three possible sources from where your can scrub contacts:

    a.  **Formatted File** - The contacts are available in a formatted file with various fields separated by a common separator or a comma-separated file.

       **Note**: If you are using the application in a localized language (other than English), save the contact file placed for upload in UTF-8 encoding.

    b.  **Database** - The contacts are available in a **Database Table** or **View** and can be uploaded directly to the campaign from the database.

4.  If you are scrubbing contacts from a formatted file, complete the following:

    a.  Clicking the **Choose File** button, choose a file that contains the contacts for upload.

    b.  From the **Delimiter** dropdown list, select a delimiter that separates various fields in your contact upload file.

5.  If you have a Profile for this upload, select one from the **Profile** dropdown list. Selecting a Profile ensures all further mapping for this contact list file is automatically accomplished as configured in the Profile.

    Profiles can be used shortcuts to work with contact-related uploads. Using these saved profiles, you can upload (including Global Upload), scrub, or upload DNC/NDNC/PEWC (compliance) contacts without having to go through the entire process of setting parameters and conditions. In other words, each Profile is an auto uploader.

6.  Navigate to the **Scrub Condition Builder** section.

7.  Use the **Scrub Condition Builder** to build conditions for filter criteria to search contacts.

    **Note**: If you are selecting the advanced condition builder, skip to Step 13.

8.  From the **System Fields / Business Fields** dropdown list, select an appropriate item.

9.  Select a compare option - this is the condition that the field should satisfy for a contact to be selected. Some comparison parameters for your condition could be > (greater than), < (lesser than), = (equals), etc.

10. Enter a value that this condition should meet for the contact to be searched.

11. Click the **Add** button to add another condition.

12. After you are done with conditions, click **Scrub** to scrub contacts from the campaign.

13. To select the advanced condition builder, turn the Enable advanced condition builder switch ON.

    a. An **Advanced Builder** requires meticulous condition building where using multiple open and closed brackets, conditions are placed manually. Any incorrect placement of such brackets may result in the search condition populating wrong and unintended contacts.

14. Enter an open bracket in the first cell.

15. From the **System Fields / Business Fields** dropdown list, select an appropriate item. See step 5 of Creating a CSS Condition - Build Conditions.

16. Select a compare option - this is the condition that the field should satisfy for a contact to be selected. Some comparison parameters for your condition could be > (greater than), < (lesser than), = (equals), etc.

17. Enter a value that this condition should meet for the contact to be searched.

18. Close the bracket.

19. Click the **Add** button to add another condition.

20. After you are done with adding conditions, click **Scrub** to scrub contacts from the campaign.


**Adding New Contacts**

To add a new contact list, follow the steps detailed below:

1. Click the **Floating Action Button (FAB)**.

2. Click **Upload Contacts FAB** to upload contacts.

3. There are three possible sources from where your can upload contacts:

    a. **Formatted File**- The contacts are available in a formatted file with various fields separated by a separator like pipe (|), tilde (~), etc., or a comma-separated file.

    b. **Database**: The contacts are available in a Database Table or View and can be uploaded directly to the campaign from the database.

       **Note**: You must not use Campaign Manager database details for uploading contacts through the database.
       Currently the application supports uploads only from the Microsoft SQL database.
       Uploading contacts through database table or view can be scheduled only once in a day at the time configured in the field **Profile Execution Time**.

4. If you are uploading from a formatted file, complete the following:

a. Clicking the **Choose File** button, choose a file that contains the contacts for upload. The following fields are reserved fields and should not be used as headers in the file containing contacts for upload.

    i. AVAILABLEMODE

    ii. BUSINESSFLDS

    iii. FTimeZone

    iv. FPriority

    v. FValidModes

    vi. FContactID

    vii. FCallStartDate

    viii. FCallStartTime

    ix. FCallEndDate

    x. FCallEndTime

    xi. FZipCode

    xii. FEmailCC

    xiii. FEmailBCC

    xiv. FEmailSubject

    xv. FEmailMessage

    xvi. FEmailAttachment

    xvii. FSMSText

    xviii. FState

    xix. FAreaCode

    xx. FLineOrRowNumber

    xxi. FAgentId

    xxii. BussFld1 to BussFld26 (26 reserved fields)

    xxiii. Mode1……anynumber

    xxiv. Mode(anynumber)_Zipcode

5. From the **Delimiter** dropdown list, select a delimiter that separates various fields in your contact upload file.

6. If you have a **Profile** for this upload, select one from the **Profile** dropdown list. Selecting a Profile ensures all further mapping for this contact list file is automatically accomplished as configured in the Profile.

    **Note**: Skip Step 4 if you do not have a Profile for mapping.

Profiles can be used as templates for with contact-related uploads. Using these saved profiles, you can upload (including Global Upload), scrub, or upload DNC/NDNC/PEWC (compliance) contacts without having to go through the entire process of setting parameters and conditions.

7. If you are uploading from a database, complete the following:

    a. Enter the database **Server Name**.

    b. Enter the **Database Name** from which you intend uploading contacts.

    c. Enter the **Username** for the application to access the database server.

    d. Enter a **Password** for the above user to complete authentication.

    e. Click the **Connect** button to establish contact with the database server.

    f. From the **Table Name** dropdown list, select a table that contains the contacts to upload.

    g. Click the **Upload** button to upload the contacts from the database table.

8. Complete **Field Mapping**.

    a. **Priority** - The priority you want to set for this contact. The higher the priority, the earlier the contact is delivered to the dialer. You may have a custom priority field (a numeric value) in your lead list to determine the priority of dialing.

    b. **Zone Name** - Map the time zone for the contacts; dialing is based on the customer time zone. Select from Timezone (user-defined), Campaign-specific Time Zone, Zip Code-specific Time Zone, and Area-specific Time Zone, State-specific Time Zone, and Area-Zip Code Specific Time Zone.

        i. **Timezone** - This is a user-defined field in the contact list upload file. The name of the field is dependent on the header as set by the user in the contact upload file. The contacts are dialed out based on this time zone.

        ii. **Campaign Specific Time Zone** - The contacts are dialed out in the time zone that the campaign operates in. Zip Code .

        iii. **Zip Code Specific Time Zone** - The contacts are dialed out based on the time zone that the contact zip code and additional zip code (if provided) intersection is located in. For this, the application also checks for any Additional Zip Code specified.

        iv. **Area Specific Time Zone** - The contacts are dialed out based on the time zone that the contact area and mode-level zip code (if provided) intersection is located in. For this, the application also checks the zip code configured in the Mode Mapping section.

        v. **State Specific Time Zone** - The contacts are dialed out based on the time zone that the contact's geographical state.

        vi. **Area-Zip Code Specific Time Zone** - The contacts are dialed out based on the time zone that the combination of contact area and the zip code location.

    c. **Area Code** - Select this checkbox if you want the application to split the area code from the phone number.

i. Select a **Start** from the number panel. This is the first character from where the area code starts. For example, if your phone number contains 12 digits, and the area code commences in the first digit, select 1 from the number panel.

ii. Select a **Length** from the number panel. This is the number of characters in your code from the Start. For example, if your phone number contains 12 digits, and the area code is three digits long from the first digit, select 3 from the number panel.

d. **Zip Code** - Select this checkbox if you want the application to split the zip code from a contact list via a third party. Sometimes, zip codes may contain additional characters that the third-party application may add to the data. You can use this split feature to ignore the unwanted data and upload the exact zip code as part of your contact list.

i. Select a **Start** from the number panel. This is the first character from where the area code starts. For example, if your phone number contains 12 digits, and the area code commences in the first digit, select 1 from the number panel.

ii. Select a Length from the number panel. This is the number of characters in your code from the Start. For example, if your phone number contains 12 digits, and the area code is three digits long from the first digit, select 3 from the number panel.

e. **Zip Code** - The zip code applicable to the contacts.

f. **State Name** - The geographical state to which these contacts belong.

g. **Additional Zipcode** - The additional zip code applicable to the contacts. To know more, click here.

9. Proceed to **Mode Mapping**.

a. **Modes** - All Modes configured for the campaign are displayed for mapping.

b. **Fields** - Select an appropriate field for this mode from the uploaded. Complete mapping for all displayed modes.

c. **Zip Code** - Select an appropriate **Zip Code** for this mode from the uploaded. Complete mapping for all displayed modes. This mapping is used to determine the contact Time Zone for dialing.

10. Map **Business Fields** next. All **Business Fields** defined for this campaign are displayed in the first column. The fields forming part of the contact upload file are displayed in the Value dropdown list. Map each **Business Field** to a **Value** in the contact field.

11. The **Optional Business Field** column contains all the fields forming part of contact file. Select checkboxes for fields that you want to be treated as **Optional Business Fields** for this campaign.

**Note**: The optional business fields mapped here appear as screen pop data on the Agent Desktop.

12. Complete the **Message Mapping** section by mapping both **Mailing Fields** and **SMS Fields**.

**Note**: Currently, this feature is not supported in Webex Contact Center

13. Complete the **Configuration** section next.

14. Select an **Upload Level** from the two options defined below.

    For campaign-level upload, select the **Campaign** button. The contacts in the list being uploaded will perform the overwrite or append/update action across the campaign - that is, across all lists. The same applies for duplicate filter.

    For list-level upload, select the **List** button. Select this option if you want operations on this list performed across a specific list, and not for list across the campaign. Select a **List ID** from the drop-down list. The contacts in the list being uploaded will perform the overwrite or append/update action on the list that you select here. The same applies for duplicate filter.

15. Define the **Time to Live** for this list. Time to Live is the validity period for this list of uploaded contacts to be eligible for dialing, subject to various other configurations on the application. From the calendar, select a Start Date for **Time to Live**.

16. Select an **Operation** from **Overwrite** or **Append/Update**. Operation performs the following task:

    a. **Overwrite**: At Campaign level, all existing contacts across lists are closed and uploads are treated as fresh contacts. At List level, all existing contacts pertaining to this list are closed and uploads are treated as fresh contacts for this list.

    b. **Append**: If upload level is Campaign, a new list is created. If upload level is List, contacts are appended to the existing contacts in the list. The Duplicate Filter checkbox is activated for selection. The Duplicate Filter looks for and uploads unique contacts, leaving out duplicates, filtered on the basis of business fields.

       **Note**: The application first looks for duplicates in the local file or database table that is ready for upload and, from such records, keeps the first record for upload. Once done, from records already uploaded for this campaign, the application scans all open contacts using the same filters. If any open contact matches the record in the upload file, such record is NOT uploaded. The records not uploaded are shown in the error table with the remark DUPLICATE.

    c. **Update**: If upload level is **Campaign**, updates the business fields for the filtered contacts.

17. **Filter**: Contacts from lists can be filtered on the basis of two business fields.

    a. **Business Field1**: The primary field based on which you want to filter and match for duplicates/update operation. All campaign business fields are listed for selection.

    b. **Business Field2**: The secondary field based on which you want to filter and match for duplicates/update operation. All campaign business fields are listed for selection.

    **Note**: You may select one or both business fields. If you select both fields, contacts are filtered using the AND operator, that is, based on BOTH business fields

18. You can, at the time of upload, mark DNC and NDNC contacts by completing the **DNC/NDNC** section.

    a. Selecting the **NDNC Filter** checkbox ensures that contacts marked as National Do Not Call are not uploaded.

b. Selecting the **DNC Filter** checkbox ensures that contacts marked as Do Not Call are not uploaded.

c. **Type** is the field on which you apply the NDNC/DNC Filters, This field could be a Phone Number, or any of the business fields (two in case of DNC), etc.

19. Click the **Save** button to complete the Contact List upload.

**Additional Zip Code**

The application offers the capability to map a contact with multiple zip codes and identify a callable window which intersects with all the time zones associated with these zip codes.

The system allows a maximum of two zip codes associated at a record level and one zip code at each contact phone number level, uploaded for calling. The system dials these numbers at a mutually interceding time interval across all the mapped zip codes at a record level and phone number that is being called.

**Notes**:
It is not mandatory to enter an additional zip code. Where an additional zip code has not been entered, the primary zip code applies.

When an invalid zip code is **Subject**: The subject line of the Email message. entered for a contact, the application picks up the default zip code value from the Contact Uploader component's web.config file, if enabled. If a default zip code is not enabled, the contact is not dialed out.

When an invalid zip code is entered for a mode, the specific mode is rendered invalid and is not dialed out.

In cases when you require validating two different entities for validating against State, make use of the **Area-Zip Code** option.

For example, the area code may be tagged with a state code, and the zip code of the same contact might be tagged with another state. each of these states may a different callable window. In such instances, the dialer dials out the contact dial in the dialable time of the state with the higher priority as set in the **System > State Law Group** page.

To enable this functionality, refer Configuration Options. See point 15 in the campaign-level configuration. Enable State Law with Area code and also select the Multiple Zip Code option. When uploading contacts, choose area-code based time zone and select the zip code mapping. (Skip selecting a second zip code and mode-level zip code mapping in such cases).

1. **Agent ID** - The agent ID for the contact.

2. **Contact Moment** - A specific date and time to dial out a contact. Select the field in the contact file that contains this detail.

3. **Moment DateTime Format** - The date time format for the Contact Moment field. Available options for the date format are dd-MM-yy HH:mm, dd/MM/yy HH:mm, MM-dd-yy HH:mm, MM/dd/yy HH:mm, yy-MM-dd HH:mm, yy/MM/dd HH:mm, dd-MM-yyyy HH:mm, dd/MM/yyyy HH:mm, MM-dd-yyyy HH:mm, MM/dd/yyyy HH:mm, yyyy-MM-dd HH:mm, and yyyy/MM/dd HH:mm.

4. **Lead Score** - Lead Score helps in identifying the most prospective customer to be reached out from a campaign. This score is available as part of contact selection strategy and can be set at the time of upload or wrap up, while defining the business / telephony outcome.

5. **Device ID** - The unique ID of the device, to which the identity authentication notifications are sent. A Device ID can be a mobile number, application ID, or a mobile equipment identity.

## Manage Contacts

**Manage Contacts** is a powerful functionality to perform a wide range of tasks relating to contacts. Using **Manage Contacts**, you can:

1. **Search Contacts**: Search Contacts for a given set of conditions.

2. **Reschedule/Reset Contacts**: Reschedule or reset the following contacts populated for a given set of conditions:

   a. **Callback Expired Contacts** are contacts where the valid time to callback has expired.

   b. **Blocked Contacts** are those that are blocked from being delivered to the dialer.

   c. **Closed Contacts** are those closed for some reason.

   d. **Rescheduled Expired Contacts** are those that have been a rescheduled dialing has expired and need to be revived for dialing

3. **Block Contacts**: Block the contacts that are populated for a given set of conditions.

4. **Close Contacts**: Close contacts that are populated for a given set of conditions.

5. **Move Contacts**: Move contacts, from one Campaign to another that are populated for a given set of conditions.

6. **Reassign Agent**: This is not applicable for the current release.

**Time Zone**

You can use the Manage Contacts application by filtering contacts based on time zones.

This feature shows all the active time zones in the Timezone dropdown list. Users can choose the required time zone.

Select the time zone from the **TimeZone** dropdown list before selecting other filter criteria or writing conditions to populate contacts.This is an optional configuration.

**Note**: The property **IsTimeZoneRequiredForFilter** should be set to **true** in the LCMService web.config file to get contacts by time zone.

Wherever there is time factor involved in the conditions chosen by the user, such times are converted to the user-selected time zone.

For example, a user has the server in India time zone and selects British Standard Time as the time zone from the above dropdown list. If the condition for populating contacts (see Condition Builder) includes the Call Start Time field - Call Start Time at 2:00 pm BST, the application converts BST to IST and populates contacts that have a Call Start Time at 6:30 pm IST. However, the grid populating the contacts shows the user-selected time zone, that is, 2.00 pm BST.

The same logic of time-zone conversion applies to any datetime-related field chosen by the user in the Condition Builder.

**Condition Builder**

To manage contacts efficiently, write your own conditions for the search criteria or build your conditions using the Advanced or the Simple Condition Builder. These conditions should help you search and filter the right contacts.

The following steps help you use the condition builder to search and filter the contacts to manage them. These steps are referred to repeatedly throughout the Manage Contacts section.

1. Turn the **Write Conditions** switch **ON** if you are writing your own filter conditions to search contacts.

2. Type the filter conditions in the **Write Conditions** text box and click the **Show Contacts** button to populate the contacts based on the conditions. You have to write conditions for the fields and their corresponding values for which you want contacts searched. The conditions you write in the Write Conditions text box is converted (by the application) into a SQL query and the results populated in a grid.

   **Note**: Knowledge of writing SQL expressions is required for getting contacts using Write Conditions.

Use the following System Fields to write filter conditions:

   a. **Max Retries** - This is the current incremented value for the maximum number of retries that can be made for dialing each contact in the campaign.

   b. **Daily Retries** - This is the current incremented value for maximum number of retries that can be made for dialing each contact in a day for this campaign.

   c. **Pass Retries** - This is the current incremented value for the retries made for each contact in the campaign.

   d. **Cycle Retries** - This is the current incremented value for the maximum number of retries that can be made in a dialing cycle. A cycle is a set of dialing attempts, once to all modes that a contact is uploaded with. For example, a contact is uploaded with three modes - Home, Work, and Mobile numbers. A dialing cycle is completed when the application dials all these modes (in the configured order) once each.

e.  **Email Retries** - This is the current incremented value for the number of retries allowed for contacts to be delivered for email campaigns.

f.  **SMS Retries** - This is the current incremented value for the number of retries allowed for contacts to be delivered for SMS campaigns.

g.  **LastAccessed** - The contacts with the configured date and time of last access to be delivered as part of this CSS.

h.  **Priority** - The priority assigned to the contacts that is to be accounted when delivering as per this CSS.

i.  **Lead Score** - The Lead Score that is to be considered for delivering contacts are per this CSS. Lead Score helps in identifying the most prospective customer to be reached out from a campaign. This score can also be set at the time of upload or wrap up, while defining the business / telephony outcome.

j.  **CallStartTime** - This is the call start time as set by the rescheduler. Calls that fall within the start time mentioned in this condition are selected for delivery.

k.  **CallEndTime** - This is the call end time as set by the rescheduler. Calls that fall within the end time mentioned in this condition are selected for delivery.

l.  **ListID** - The list ID that the contact belongs to. Contacts belonging to the ListIDs in this CSS condition are delivered.

m.  **CallType** - The call type.

n.  **LastOutcome** - The last outcome set for this contact. Contacts with the selected Last Outcome are delivered.

o.  **Global ListID** - The Global List ID that this contact belongs to. Contacts belonging to the Global ListIDs in this CSS condition are delivered.

p.  **UserID** - This the agent ID tagged to the contact. Calls are delivered to the dialer and are patched to the agent mentioned in this field.

q.  **Phone Number** - The phone number of the contact to deliver as per this CSS.

r.  **Zone Name** - The name of the time zone to which the contact belongs.

s.  **StatusReasonID** - This is the integer value which is the internal ID for Status Description.

In addition to the above System Fields, you can also use any or all of the Business Fields in your filter condition.

**Note**: You must use BUSSFLD1 through BUSSFLD26 and not the mappings assigned (from contact upload files) like First Name, Customer ID, etc.

3.  You can also use the **Build Condition** to build conditions for filter criteria to search contacts.

4.  Turn the **Advanced Builder** switch **ON** if you want to build an **Advanced Condition**.

An **Advanced Builder** requires complex condition building where using multiple open and closed brackets, conditions are placed manually. Any incorrect placement of such brackets may result in the search condition populating wrong and unintended contacts. On the other hand, if the **Advanced Builder** switch is **OFF**, you can add conditions in groups, with pre-selected and/or conditions.

5. The **Advanced Builder** screen is shown below.

**Note**: Skip to Step 14 if you are using the simple condition builder.

6. Enter an open bracket in the first cell.

7. From the **System Fields / Business Fields** dropdown list, select an appropriate item. See step 5 of Creating a CSS Condition - Build Conditions.

    a. If you select System Fields **List ID** or **Global List ID**, a pop up allows you to select the appropriate list from the available lists

8. Select a compare option - this is the condition that the field should satisfy for a contact to be selected. Some comparison parameters for your condition could be > (greater than), < (lesser than), = (equals), etc

9. Enter a value that this condition should meet for the contact to be searched.

10. Close the bracket.

11. Click the **Add** button to add another condition.

12. After you are done with conditions, click **Save** to complete.

13. If you are not using the Advanced Builder, use the **Simple Builder** as shown in the screen below:

14. From the **System Fields / Business Fields** dropdown list, select an appropriate item. See step 5 of Creating a CSS Condition - Build Conditions.

    a. If you select System Fields **List ID** or **Global List ID**, a pop up allows you to select the appropriate list from the available lists.

15. Select a compare option - this is the condition that the field should satisfy for a contact to be selected. Some comparison parameters for your condition could be > (greater than), < (lesser than), = (equals), etc .

16. Enter a value that this condition should meet for the contact to be searched.

17. Click the **Add** button to add another condition.

18. In the new line, select either **AND** or **OR** from the decision dropdown list.

19. You can keep adding more such condition groups. Click **Save** when you are done.

20. If you want to add more groups, select the **Add** button from the **Group Action** buttons.

21. Repeat Steps **14** through **21**.

22. From the **System Fields / Business Fields** dropdown list, select an appropriate item. 23.

23. From the **Sort** dropdown list select, **Asc** or **Desc** for Ascending or Descending sort, respectively.

24. Click the **Add** button to add more sort orders.

25. Once done with sort orders, click **Save** to complete conditions.

**Show Contacts**

The contacts are displayed when you click the **Show Contacts** button after completing the conditions and saving them. The contacts are populated. See below for details of the columns.

**Contact ID** - the unique contact ID for the contact listed as per the conditions.

**Attempts** - the number of attempts made on the contact till this moment.

**Note**: If Retain Global Retries and/or Retain Daily Retries are deselected either in Campaign Chaining or Campaign Contact Strategy, the attempts are reset as per business requirements. Attempts made before such reset are not included in the count shown here.

**List ID** - the list ID from which the contact is uploaded.

**LastOutcome** - the last outcome received by the dialer for this contact.

**Status** - the current contact status. • Call_Start_Date - the start date for the listed contact's next scheduled call as per the conditions. This is converted to the user-selected time zone and shown in the grid.

**Call_Start_Time** - the start time for the listed contact's next scheduled call as per the conditions. This is converted to the user-selected time zone and shown in the grid.

**Call_End_Date** - the end date for the listed contact's next scheduled call as per the conditions. This is converted to the user-selected time zone and shown in the grid. • Call_End_Time - the end time for the listed contact's next scheduled call as per the conditions. This is converted to the user-selected time zone and shown in the grid.

**Business Fields** - all the configured business fields' values for this contact are listed at one business field per column. If any business field contains a datetime value, the date/time is not converted to the user-selected time zone.

**Mode** - all the modes for this contact are listed at one mode per column


**Search Contacts**

Use the **Search Contacts** functionality to search contacts for a given set of conditions.

1. From the **Filter** section of the **Manage Contacts** screen, select the **Search Contacts** button.

2. Complete the "Condition Builder" on page 48

3. Click the **Show Contacts** button to populate the contacts based on the conditions.

**Reschedule or Reset Contacts**

Using the **Reschedule/Reset Contacts** option, you can reschedule or reset contacts that are populated based on the given set of conditions.

1. From the **Filter** section of the **Manage Contacts** screen, select the **Reschedule/Reset** Contacts button.

2. There are two ways of selecting contacts to **Reschedule/Reset**. To directly select certain types of contacts, see **Step 3**. To select contacts via your own filter conditions, see **Step 4**.

3. Select the types of contacts you want to reschedule/reset. The options are:

    a. **Callback Expired Contacts**, contacts where the valid time to callback has expired.

    b.  **Blocked Contacts**, those that are blocked from being delivered to the dialer.

    c. **Closed Contacts**, the contacts closed for some reason.

    d. **Rescheduled Expired Contacts**, those that have been a rescheduled dialing has expired and need to be revived for dialing.

4. Complete the Condition Builder.

5. Click the **Show Contacts** button to populate the contacts based on the conditions.

6. The contacts are populated, at the requested items per page. Select specific contacts or use one of the following options:

    a. Select the **Select All** checkbox to select the contacts populated on the page.

    b. Select the **Global Select** checkbox to select all the contacts across pages.

7. Click the **Actions** button.

8. Perform one of the following operations on the selected contacts:

    a. Select **Revise Reschedule Time** to reschedule the contact to a later date and/or time. Specify the **Start Time** and **End time** to reschedule the contact in this window. Click **Reschedule Contacts** to complete action. The revised start and end times are as per the user-selected time zone via the dropdown list.

    b. Select **Reset as Fresh Contact** - this action resets the contact as Fresh Contact. Click **Reschedule Contacts** to complete action.

    c. Select **Reopen Contacts** to reopen the contact for dialing. Click **Reschedule Contacts** to complete action.

       **Note**: If you select the Undo business field values updated by agents checkbox, the application discards the updates to business field values, if any, made by the agents during their interactions, and the application reverts to the business field values at the time of contact upload.

       For example, contact A is uploaded with business field values for mobile number and Customer ID (123456). During agent interaction, the customer requests change in mobile

number and customer ID (to 345678), and the agent updates the values. At the time of reopening this contact using the CSS conditions, you have the option of reverting to the original mobile number and customer ID (123456) by selecting this checkbox.

9. At any stage during this process, click **Cancel** to revert to the listed contacts

**Block Contacts**

Using the **Block Contacts** option, you can prevent the contacts (populated based on the search criteria) from being dialed out by changing the contact status to **Blocked**.

1. From the **Filter** section of the **Manage Contacts** screen, select the **Block Contacts** button.

2. There are two ways of selecting contacts to **Block**. To directly select certain types of contacts, see **Step 3**.To select contacts via your own filter conditions, see **Step 4**.

3. From the **Followup Details** section, select a **From Date** and a **To Date**. Contacts falling in this follow-up date range are populated.

   **Note**: The **Open Contacts** checkbox is in a selected condition and you cannot deselect it. This is a default condition that fetches Open Contacts for this date range

4. Complete the Condition Builder.

5. Select the **Fresh Contacts** checkbox to directly fetch **Fresh Contacts** without having to write conditions to fetch contacts. To populate **Delivered Contacts** that meet the filter conditions, select the **Delivered Contacts** checkbox too .

6. Click the **Show Contacts** button to populate the contacts based on the conditions.

7. The contacts are populated, at the requested items per page. Select one of the following check-boxes:

   For each contact,

   **Select All** to select all the contacts on the current page,

   or **Global Select** to select all populated contacts across all pages.

8. Click **Apply** to block the selected contacts.

**Close Contacts**

Using the **Close Contacts** option, you can close contacts that are populated based on the given set of conditions.

1. From the **Filter** section of the **Manage Contacts** screen, select the **Close Contacts** button.

2. There are two ways of selecting contacts to **Close**. To directly select certain types of contacts, see **Step 3**. To select contacts via your own filter conditions, see **Step 4.**

3.  From the **Followup Details** section, select a **From Date** and a **To Date**. Contacts falling in this fol-low-up date range are populated.

    **Note**: The Open Contacts checkbox is in a selected condition and you cannot deselect it. This is a default condition that fetches Open Contacts for this date range.

4.  Complete the Condition Builder.

5.  Select the **Fresh Contacts** checkbox to directly fetch **Fresh Contacts** without having to write con-ditions to fetch contacts. To populate **Blocked Contacts** and **Delivered Contacts** and that meet the filter conditions, select the respective checkboxes, as required, too.

6.  Click the **Show Contacts** button to populate the contacts based on the conditions.

7.  The contacts are populated, at the requested items per page. Select one of the following check-boxes:

    For each contact, or **Select All** to select all the contacts on the current page,or **Global Select** to select all populated contacts across all pages.

8.  Click **Apply** to close the selected contacts.

**Move Contacts**

Using the **Move Contacts** option, you can move populated contacts based on the given set of conditions from one campaign to another.

1.  From the **Filter** section of the **Manage Contacts** screen, select the **Move Contacts** button.

2.  There are two ways of selecting contacts to **Move**. To directly select certain types of contacts, see Step 3. To select contacts via your own filter conditions, see **Step 4**.

3.  Select **Blocked Contacts** and/or **Closed Contacts** checkboxes to include these contacts to move from one campaign to another.

4.  Complete the Condition Builder.

5.  Click the **Associate Fields** button to map the modes and business fields from the source campaign to those of the target campaign.

6.  Enter a **Mapping Name**. All the modes and fields as mapped are retained in this operation. You can also change any specific mode or business field mapping.

7.  If you do not want a previous mapping to apply, select a **Target Campaign** from the dropdown list. The Modes and the **Business Fields** in the **Target Campaign** are populated. Select the appropriate modes and business fields from the **Source Campaign**.

8.  Click **Apply** to complete associating the fields.

9.  Click the **Show Contacts** button to populate the contacts based on the conditions.

10. The contacts are populated, at the requested items per page. Select one of the following check-boxes:

    For each contact, or **Select All** to select all the contacts on the current page, or

    **Global Select** to select all populated contacts across all pages.

11. Click **Apply** to move the selected contacts to the target campaign.


**Re-assign Agents**

**Note**: The Re-assign Agents feature is not supported in the current release.

Situations may arise, mainly while delivering personal callback calls that the agent assigned to the personal callback is not available to handle the call. In such situations, you can simply reassign another agent to handle the call.

Using the **Reassign Agents** option, you can now reallocate contacts from one agent to another.

1. From the **Filter** section of the **Manage Contacts** screen, select the **Reassign Agents** button.

2. There are two ways of selecting contacts. To directly select certain types of contacts, see **Step 3**. To select contacts via your own filter conditions, see **Step 4**.

3. Enter an **Agent ID** from whom a call is to be reassigned. To include fresh contacts in the results, select the **Fresh Contacts** checkbox; else select the callback **Call Start Date** and **Call End Date**.

4. To reassign fresh contacts, select the **Fresh Contacts** checkbox. Select a **Call Start Date** and a **Call Start Time** to narrow down the contacts to this window.

5. Complete the Condition Builder.

6. Click the **Show Contacts** button to populate the contacts based on the conditions.

7. The contacts are populated, at the requested items per page. Select one of the following check-boxes:

    For each contact,

    or **Select All** to select all the contacts on the current page,

    or **Global Select** to select all populated contacts across all pages.

8. Click **Action** to see the **Reassign Agent** dialog box to reassign the selected contacts to other agents.

9. Additional information is available if you click the **Help** icon alongside the **Action** button. The additional information explains when the agent reassignment takes effect.

    a. For **Open** contacts, the changes are effective immediately.

    b. For **Delivered** contacts, call still reaches the old agent. The new agent changes are effective only from the subsequent delivery of the contact.

10. Enter a new **Agent** to whom the call is to be reassigned. The call is allocated to the new agent.

11. If the new agent has to handle the call at a different time, select the **Update Time** checkbox. Select the **Start Time** and **End Time** for the call. Click the **Reassign Agent** button to complete reassigning the call to a different agent.

## Schedule

The **Schedule** tab helps you to schedule contact delivery to the dialer. The three elements that determine the schedule that you campaign runs are:

1. **CSS Schedule**: A contact selection strategy (CSS) schedule helps to use contact selection strategy for different times of the day. You can define these CSS schedules for blocks of time for each day of the week. For configuring CSS to be used here, see Contact Selection Strategy.

2. **Runtime Scheduling**: If you have different campaign runtimes for each day, use this functionality to define, for each day of the week, campaign start and end times.

3. **Contact Mode Scheduling**: Use this section to configure the times, for days of the week, the Contact Strategy to be used for dialing. You can either select a contact strategy for the entire day, or a maximum of three time splits during a day. You can also use different contact strategy on different days of the week and/or define the weekly day off that the campaign does not run.

   **Note**: Only Advance Contact Strategies are available for selection.

4. **Holiday**: This section allows you to select the campaign holidays - the days that your campaign does not run.

   **Note**: Holidays are added in the System menu. This section only allows you to select from the added Holidays. See Holidays for more information.

### CSS Schedule

From the **Schedule** page, expand the **Contact Selection Strategy (CSS) Schedule** section to complete this configuration.

Use the slider to select the time range you want displayed. For the selected time range, the CSS option is displayed.

You can either click the Add Schedule button or Double-click on a cell in the week-day grid.

1. In the pop up, select the day for which you are adding the CSS Schedule. You can also select the **All Days** checkbox. If you double-click a grid to configure a CSS Schedule, the day of the week is pre-selected in the pop up.

2. From the time panel, select a **Start Time** and an **End Time** for this CSS Schedule. Select a CSS from the dropdown list.

**Note**: You can select multiple overlapping time slots, but the start time and end time should be unique. For example, you can select a time slot from 10:00 to 18:00 with CSS as CSS1. You are also allowed to select a time slot from 09:00 to 19:00 with CSS as CSS2. In this case, the application delivers contacts as per CSS2 from 09:00 to 10:00 and again from 18:00 to 19:00. In the interim, it delivers contacts as per CSS1 from 10:00 to 18:00.

3. Click **Add** to add this schedule to the campaign.

4. To add more CSS Schedules, click the **Add Schedule** button or double-click on a cell in the week-day grid to select the CSS Schedule time. Follow Steps 1 to 3 above.

5. Repeat the process for as many days of the week you require to configure the schedules for.

6. To delete any added scheduled time slot, click the **Delete** button.

7. Navigate to the **Runtime Scheduling** section next.

**Runtime Scheduling**

The **Runtime Scheduling** determines the campaign run times, for a specific date. The campaign runs during the times configured here, overriding the start date time and end date time as configured during campaign creation.

1. Click the **Add** button to add a new run time for the campaign.

2. Enter a **Run Date** for configuring the run time.

3. From the Time Panel, select a **Start Time** and an **End Time**.

4. Click the **Add** button to add more run times using step 3.

   **Note**: You can add only three run times for a day.

5. When done, click the **Save** button.

6. To delete any configured run time, click the **Delete** button.

7. Navigate to the **Contact Mode Scheduling** section.

**Contact Mode Scheduling**

**Contact Mode Scheduling** helps configure the Contact Strategy to be used for delivering contacts to the dialer for each week day. You can configure a maximum of three splits per day - define three different strategies for different time slots.

Follow the steps listed below to configure **Contact Mode Scheduling**:

1. The days are listed in the first column. Select the day to configure and turn the **Working Day** switch **ON**.

   **Note**: The campaign does not run on the days for which the Working Day switch is turned OFF.

2. From the dropdown list, select a Contact Strategy to be applied for contact delivery.

   **Note**: Only Advance Contact Strategies are available for selection.

3. The selected contact strategy runs through the day. Should you require the contact strategy to run only at specific timings, turn the **Custom Time** switch **ON**.

4. The **Time Range** column shows default start and end times of 12:00 AM to 11:59 PM, respectively. Use the time panel to change the start and end times.

5. Click the **Add** button to add another time range.

   **Note**: You can add a maximum of three time ranges for a day.

6. Click the **Save** button to save the information.

7. To delete any configured run time, click the **Delete** button.

8. Navigate to the **Holiday** section.

**Holiday**

Using the **Holidays** feature, map the campaign holidays - the days that the campaign does not operate. All the holidays created in the System configuration Holiday feature are available for selection. Map those holidays to this campaign.

The holidays available for selection are displayed.

1. Select the checkboxes corresponding to the holidays you want to map for this campaign, or Select the **Select All** checkbox to attach all the holidays to this campaign.

2. Click the **Save** button to save the information.

## Other Configurations

To complete campaign configuration creation, a few other configurations are also required to be completed. All these configurations are grouped in this section. They are:

- Expression Builder
- Campaign Target
- Server Scripts
- Set Contact Thresholds
- Configure Telephony Outcomes
- Agent Desktop Configuration

To open only one of the items listed above, select the **Enable to view one Panel at a time** checkbox.

**Expression Builder**

You can create frequently used criteria in expression builder and use them in **Contact Selection Strategy** (CSS) and **Manage Contacts**.

Use the **Expression Builder** to accomplish this task.

1. Expand the **Expression Builder** section to commence building an expression.

2. Click **Create New** to create a new expression.

3. Enter an **Expression Name**.

4. Select a **Function** from the dropdown list. A few key SQL functions like LEFT, RIGHT, SUBSTRING, REPLACE, DATEADD, DATEDIFF, DATEPART, DAY, MONTH, and YEAR are available for selection.

5. There are three parameters that you can choose for this expression. Click the **Settings** button against **Parameter 1**.

**Notes:**
For functions **Left**, **Right**, **Substring**, and **Replace**, all the Business Fields and System Fields for this campaign are populated. Select one of these and click **Select**.
For all other date-, day- and time-related functions, the options are **Last Accessed**, **Now**, and **Created Time**. Select one of these and click **Select**.
When you use the date time function to build a custom expression, the parameter **now** considers only the server time zone.

6. Repeat **Step 5** for **Parameter 2** and **Parameter 3**, if required.

7. Click **Save**. This expression is now available for selection when you create a new CSS.

**Campaign Target**

In the Campaign Target tab, you can set daily, weekly, and monthly targets for agents to achieve.

1. Expand the **Target** section to set a target

2. Enter a **Category Name** for the target you intend setting.

3. Enter a **Description**.

4. From the respective counters, select or enter figures for **Daily Target**, **Weekly Target**, and **Monthly Target**.

5. Select the **Telephony Outcomes** and the **Business Outcomes** to group for this **Category**. You can select multiple outcomes. To select all outcomes, select the checkbox in the header rows.

6. Click the **Save** button to save the information.

**Server Scripts**

Server Script is used to customizing the Campaign Manager based on business requirements for specific customers. There are two types of scripts that developers use, pre-call scripts and post-call scripts.

Refer **Server Scripts** for more information.

**Contact Threshold**

**Contact Threshold** is a campaign-specific feature that sends out alerts when the contacts available for delivery to the dialer reaches below a configured number.

Turn the **Threshold Alert** switch **ON** if you require the application to monitor the contacts available for delivery to the dialer, and send out the alerts. Complete the information detailed below:

1. **Advance Forecast (Minutes)** - The application monitors the contacts available for delivery and sends alerts before the time configured here. If you configure 15 minutes, the alerts are sent out 15 minutes before Threshold Duration when the forecast contacts fall below the Minimum Number of Contacts.

2. **Minimum Number of Contacts** - The minimum number of contacts that should be available for delivery to the dialer. If the contacts reach below this level, the alert is sent out.

3. **Threshold Duration (Minutes)** - The duration of the threshold being monitored. The alert is sent out based on the duration set here.

4. Click **Save** to complete; **Cancel** to exit without saving changes; and **Delete** to delete the Threshold Alert set for this campaign.

For example, if you set Advance Forecast as 15 minutes, Minimum Number of Contacts as 100, and Threshold Duration as 120 minutes, the application sends out an alert 2h 15m when the count deliverable contacts (fresh plus rescheduled) is expected to reach below 100.

**Configure Telephony Outcomes**

The **Telephony Outcomes** section allows you to control the telephony outcomes that a logged-in agent can view. By extension, it is only these outcomes that are available to the agent to select while disposing of a call.

All the telephony outcomes listed in the Campaign Group to which this campaign belongs to are listed here. The **AgentView** column inherits the property as set in the parent Campaign Group.

If your business needs any of these agent-viewable outcomes to be hidden to agents or vice versa, turn the **AgentView** switch for the specific outcome to **ON** or **OFF** as required.

**Note**: The AgentView option is not applicable for Webex Contact Center.

Click **Save** to commit these changes or **Cancel** to revert without saving these changes.

**Agent Desktop Configurations**

**Note**: Currently, this feature is not supported in Webex Contact Center.

The **Agent Desktop Configuration** section allows you to configure various aspects of marking a contact as DNC. When an agent marks a contact as DNC, these configurations determine the various attributes of the DNC.

1. Turn the **Requires Disposition** switch **ON** if you want a disposition mandatory when an agent handles a call.

2. Select a **DNC Period Type**. The options available are listed below.

   a. **Permanent** - When an agent marks a contact as DNC, it is marked so permanently.

   b. **Specific Day** - Select a specific number of days for the contact to remain DNC. You can select a minimum of 1 day and a maximum of 3650 days (10 years). In addition to selecting a day, you can choose to turn the EOD switch ON. If you turn the switch on, the DNC ends at end of day on the number of days configured. If this switch is left OFF, the DNC ends on the next day, at the same time an agent selects the contact as DNC.

      ○ For example, an agent sets a contact as DNC, with the number of days configured as 1. If the EOD switch is ON, the contact's DNC period concludes at the end of the same day. If the switch is turned OFF, the contact's DNC period concludes same time next day - that is, spills over to the next day and ends after 1 day is complete.

   c. **Agent Selection** - If you select this option, the agent sets the DNC Start date and time and the End date and time (based on the contact preference). The date and time picker on the Outcome widget on the Agent Desktop is enabled if you select this.

3. Select the **DNC Customer Time Zone** switch ON if the contact is marked as DNC in the contact's time zone. If your leave it OFF, the DNC is based on the server time zone.

4. Select a **DNC Type**. The following options are available:

   a. **Campaign Specific** - This restricts the contact as DNC only for the campaign from which the contact is dialed out.

   b. **Campaign Category** - This restricts the contact as DNC for all the campaigns under the campaign category.

   c. **Multiple Category** - This marks the contact as DNC for all the campaigns mapped to the selected campaign categories.

   d. **Global** - This marks the contact as DNC across the entire system - all campaigns and categories.

5. Click **Save** to complete **Agent Desktop Configuration**; click **Cancel** to exit without saving.

   **Note**: Changes you make here take effect from the very next call that an agent handles. For example, the DNC Period is configured as Permanent, this is the DNC period if an agent sets an outcome as DNC. However, if you change to Specific Day, the current call inherits Permanent;

the Specific Day becomes effective only for the next call handled by the agent.

## Campaign Dialer Settings

The **Campaign Dialer Settings** module allows you to override the settings made at the group level in respect of CLI, Answering Machine Treatment, and Abandoned Call Treatment. The overridden settings apply only for the specific campaigns, whereas the other campaigns in the group follow the group-level settings.

Navigate to the **Campaign** > **Dialer Settings** to view the **Campaign Dialer Settings** screen.

Perform the following tasks to configure the dialer settings:

1. "Add Condition" below
2. "Filter" on the next page
3. "CLI" on page 64
4. "Answering Machine Treatment" on page 65
5. "Abandoned Call Treatment" on page 66

**Fields**

| Fields | Description |
| --- | --- |
| Total Conditions | The count of total conditions. |
| Condition Name | Name of the condition. |
| Condition Description | Description of the condition. |
| Enabled | Turn On/off the switch to enable or disable the condition. |
| Actions | Actions button to edit/delete a condition. |

**Note:** For Shared List, the Target Campaign Groups with its associated conditions are populated in the grid.

**Add Condition**

You can add conditions using the condition builder. The contacts that match these filter conditions follow the campaign-level dialer settings; other contacts follow the group-level settings.

You can add any number of conditions, but at any time only five conditions can be enabled and the application filters contacts based on only five conditions.

**Note**: For Shared List, you can add any number of conditions but only five conditions can be enabled for each target campaign group.

Click **Add Condition** to add a new campaign dialer settings condition.

1. Enter a **Condition Name**. This is a mandatory field. You cannot use special characters in the name, except underscore, dash and at (_, -, and @, respectively.

2. Enter a **Condition Description**.

3. Select a **Target Campaign Group** from the dropdown.

   **Note**: The Target Campaign Group field is applicable only for the Shared List campaign of all the dialer and non-dialer.
   It is mandatory to configure a CSS condition for the Shared List campaign to display the list of target campaign groups in the dropdown.
   In the Target Campaign Group, the first target campaign group is selected by default, and the values are populated accordingly in the following tabs based on the pacing modes settings in the Campaign Group.

4. Select a compare option - this is the condition that the field should satisfy for a contact to be selected. Some comparison parameters for your condition could be > (greater than), < (lesser than), = (equals), etc.

5. Enter a value that this condition should meet for the contact to be selected for delivery.

**Filter**

Using **Filter**, you can build a condition or a set of conditions.

1. From the **System Fields / Business Fields** dropdown list, select an appropriate item.

2. Close the bracket.

3. Click the **Add** button to add another condition.

4. In the new line, select either **AND** or **OR** from the decision dropdown list.

5. You can keep adding more such condition groups. Click **Save** when you are done.

6. If you want to add more groups, select the **Add** button from the **Group Action** button and click **Save**.

**Fields**

| Fields | Description |
| --- | --- |
| Max Retries | This is the current incremented value for the maximum number of retries that can be made for dialing each contact in the campaign. |
| Daily Retries | This is the current incremented value for the maximum number of retries that can be made for dialing each contact in a day for this campaign. |
| Cycle Retries | This is the current incremented value for the maximum number of retries that can be made in a dialing cycle. A cycle is a set of dialing attempts, once to all modes that a contact is uploaded with. For example, a contact is uploaded with three modes - Home, |

| | Work, and Mobile numbers. A dialing cycle is completed when the application dials all these modes (in the configured order) once each. |
|---|---|
| Email Retries | This is the current incremented value for the number of retries allowed for contacts to be delivered for email campaigns. |
| SMS Retries | This is the current incremented value for the number of retries allowed for contacts to be delivered for SMS campaigns. |
| Last Accessed | The contacts with the configured date and time of last access to be delivered as part of this CSS. |
| Priority | The priority assigned to the contacts that is to be accounted when delivering as per this CSS. |
| Lead Score | The Lead Score that is to be considered for delivering contacts are per this CSS. Lead Score helps in identifying the most prospective customer to be reached out from a campaign. This score can also be set at the time of upload or wrap up, while defining the business / telephony outcome. |
| CallStartTime | This is the call start time as set by the rescheduler. Calls that fall within the start time mentioned in this condition are selected for delivery. |
| CallEndTime | This is the call end time as set by the rescheduler. Calls that fall within the end time mentioned in this condition are selected for delivery. |
| ListID | The list ID that the contact belongs to. Contacts belonging to the ListIDs in this CSS condition are delivered. |
| CallType | The call type. |
| LastOutcome | The last outcome set for this contact. Contacts with the selected Last Outcome are delivered. |
| Global ListID | The Global List ID that this contact belongs to. Contacts belonging to the Global ListIDs in this CSS condition are delivered. |
| UserID | This the agent ID tagged to the contact. Calls are delivered to the dialer and are patched to the agent mentioned in this field. |
| Phone Number | The phone number of the contact to deliver as per this CSS. |
| Zone Name | The name of the time zone to which the contact belongs. |
| Day of Week | The preferred day of week of the contact to receive a call. |
| Time of Day | The preferred time of day of the contact to receive a call. |
| Mode | The preferred mode of the contact to receive a call. |

**CLI**

**Note**: You can configure a CLI number only for Predictive and Progressive campaigns.

CLI is the contact number appears as an Outbound Called ID to the customer while receiving a call.

You can create three types of CLIs. They are:

1. Specific CLI
2. Business Field
3. Random CLI

## Specific CLI

By default, **Specific CLI** is selected. Perform the following steps:

1. Enter the **CLI Name**.

2. Enter the **CLI Value**.

   **Note**: For dialer, the CLI Value is populated automatically by default. It is the same number which is selected as ANI (CLI) in Campaign Group. Also, you can add a specific CLI for this campaign in addition to ANI (CLI).

## Business Field

Perform the following steps:

1. Enter the **CLI Name**.

2. Select a business field as **CLI Value**. The business field CLI allows you to specify fields from the uploaded contact file that has to be used as CLI. Ensure your contact file contains the required data.

   **Note**: The business fields with String data types are only allowed.

## Random CLI

Perform the following steps:

1. Enter the **CLI Name**.

2. Enter the **CLI Value**.

You can add up to 10 random CLIs based on your requirement. The application fetches any number out of the 10 as the CLI to show as an Outbound Called ID to the customer while receiving a call.

### Answering Machine Treatment

**Note**: Currently, this feature is not supported in Webex Contact Center.

1. Navigate to **Answering Machine Treatment.**

2. Select the **AMD Detection** type from the dropdown. For example, **Disconnect**.

3. If you select **Disconnect**, no settings configuration are required.

4. If you select **Transfer to Agent**, the application transfers the call to an agent when it encounters an answering machine response.

5. If you select **Play Message and Disconnect** , the **TTS Text** is displayed.

6. Enter the **TTS Text**. The message is played out to the caller on the IVR and gets disconnected.

7. If you select **Play Message and Transfer to Agent**, the **TTS Text** is displayed.

8. Enter the **TTS Text**. The message is played out to the caller on the IVR and gets transferred to an agent.

9. Click **Save**.


**Abandoned Call Treatment**

**Note**: Currently, this feature is not supported in Webex Contact Center.

1. Navigate to **Abandoned Call Treatment.**

2. Select **Abandoned Call Treatment** type from the dropdown. For example, **Disconnect**.

3. If you select **Disconnect**, no settings configuration are required.

4. If you select **Play Message and Disconnect** , the **TTS Text** is displayed.

5. Enter the **TTS Text**. The message is played out to the caller on the IVR and gets disconnected.

6. Click **Save**.


# Server Script

Server Script is used to customizing the Campaign Manager (Campaign Manager) based on business require-ments for specific customers. There are two types of scripts that developers use, pre-call scripts and post-call scripts.


## Pre-call Scripts

A pre-call script can be used to integrate with an external application or database to take the final decision on dialing a contact. This ideally happens before delivering the contacts to dialer.

The pre-call script must be created using MEF. It includes ExecutePreCallScript method to call a function that executes the pre-call logic. These scripts instruct the contact feed engine to deliver the contacts to the dialer, based on the script pattern.

**Note**: The sample board must have the same Script Name that a developer uses.

## Post-call Scripts

Post-call scripts can be used to perform any operation after dialing, like validating the outcome received from the dialer and customizing the reschedule behavior, or any third-party integration like updating the CRM status about the call result, and so on.

Post call script allows you to customize the product as detailed below:

- Before Reschedule: This is executed before rescheduling the contact (can change various parameters that influence the reschedule logic through custom logic).

- After Reschedule: After rescheduling the contact (can use the reschedule information to further enrich or change the strategy and use the information to update external platforms).

- Both: The script is executed both Before Reschedule and After Reschedule.

## Pre-call Scripts

| Pre-call Script | Data Type | Description |
|---|---|---|
| CampaignID | nvarchar(64 | Name of the Campaign. |
| ContactID | Int | Unique ID for a Campaign. |
| ListID | Int | List ID is Unique ID for a Campaign. |
| MODEID | Int | Internal ID of Mode Name, refer as OBD_Modes table. |
| CampaignKey | Int | Internal ID for a Campaign, refer Obd_Campaign Table. |
| CampaignKey | Int | Attempts made for the contact so far. |
| ModeRetries | Int | The number of tries in the same mode. This is reset when dialing switches to the different mode. |
| MaxRetries | Int | The number of tries made for a contact till this moment. It is equivalent to contact retries. |
| CValue | nvarchar(12) | Phone number to which the call will be dialed (or) Email ID to which the email will be sent. |
| TimeZoneID | Int | Internal ID of Time Zone Name, refer as OBD_ TimeZone table. |

| TenantID | Int | This is applicable only for Tenant module, this is unique ID for a Tenant. |
|---|---|---|
| UserID | Int | For PCB contacts, the Agent ID from which the callback is registered. For Regular Callback this field holds the value as LCM. For AEM Contacts, the contact is tagged to this Agent. |
| CallType | Int | 0 - Regular call |
| ConditionID | Int | Internal ID of CSS Condition (refer OBD_CustomFilters). |
| CISCOALTERNATEVDN | nvarchar(12) | No longer used |
| PhoneNumber | nvarchar(12) | Phone number to which the call will be dialed (or) Email ID to which the email will be sent. |
| BUSSFLD1 to BU0SSFLD20 | nvarchar(128) | Value of Business field1 to Value of Business field20. |
| BUSSFLD21 to BU06SSFLD26 | nvarchar(Max) | Value of Business field21 to Value of Business field26. |
| CONTACTDETAIL | nvarchar(Max) | Optional Business field value. This field holds the value in XML type. |
| MailSubject | nvarchar(1024) | Email subject. |
| MailMessage | nvarchar(Max) | Email body. |
| MailAttach | nvarchar(1024) | Email attachment. This must absolute path to the location where the attachment is saved. |
| SMSText | nvarchar(4000) | SMS message |
| ZONENAME | nvarchar(128) | Zone Name of the Mode. The current mode which the contact has picked. |
| ZipCode | nvarchar(32) | Zip code of the contact. |
| AreaCode | nvarchar(50) | Area Code of the Mode. The current mode which the contact has picked. |
| StateName | nvarchar(64) | State Name of the contact |
| RescheduleExpiredTime | DateTime | Call end time - For Reschedule contacts, the call end time is considered. For Callback contacts, the callback end time is considered. |
| ListEndTime | DateTime | End Time of the List. |
| CallbackTime | DateTime | CallBack Start Time. |
| PRIORITY | int | Priority of the Contact. |
| LastAccessed | DateTime | The date and time when contact information is updated on the Contact table. |
| ListTimeToLive | int | Time to live for a List. |

| | | |
|---|---|---|
| DailyRetries | int | Retries made for the current day. |
| CycleRetries | int | Number of cycle Retries has made so far. |
| LastOutCome | int | The last outcome received from the dialer for this contact. |
| GID | int | Global List ID. |
| IsWireless | Bool | Flag to determine whether the current mode is wired or wireless. |
| MAILCC | nvarchar(Max) | The recipients that need to be mapped in the CC field while sending an email. |
| MAILBCC | nvarchar(Max) | The recipients that need to be mapped in the BCC field while sending an email. |
| EmailRetries | int | Number of Emails sent so far. |
| SMSRetries | int | Number of SMS sent so far. |
| ListProcessingDate | DateTime | List start date time. |
| LeadScore | int | Lead Score. This can be part of Upload List to rank the Contact. |
| Weightage | int | Weightage of the Mode. The current mode which the contact has picked. |
| ChannelType | int | Channel type of the Mode. The current mode which the contact has picked. |
| EmailSMSTemplateName | nvarchar(64) | Name of the template that is executed. This is the template selected based on the conditions defined. |
| AccountNumber | nvarchar(30) | It is a unique ID to identify a call attempt for a contact. |
| DeliverType | nvarchar | This defines whether the contact is delivered to a dialer or an agent such as Manual dialing (Deliver - PEWC, Deliver - Regular) |
| RetValue | bool | This flag must be set to True when the script is executed and the contact must be dialed out. This flag must set to False when this contact are prevents from being dialed out at this moment. |
| IsListExpired | bool | A flag which denotes the expiry of this contact under a List based on the Time Zone. |
| BusinessOutcome | nvarchar | This is related to the *RetValue* field. While *RetValue* is set to false, it is mandatory to set the Business/Telephony outcome when there is a need to prevent the contact from dialing. |
| Module | nvarchar | Expiry Module (Campaign, Time Zone, Mode, Contact, List). This is applicable for manual dialling |

| | | (non-PEWC). |
|---|---|---|
| ExpiryTime | DateTime | Expiry time of the contact. This is derived based on the end time of the listed module (Campaign, Time Zone, Mode, Contact, List). |
| ResetContactLeadScore | bool | A flag to reset the lead score value (this is internal flag). |
| TemplateName | nvarchar | Name of the template that is executed; this is the template selected, based on the conditions defined. |
| CallID | nvarchar(64) | This is a unique ID for a call. |
| DeliverdTimeZone | nvarchar(128) | The contact time zone is held in this field. |
| TimezoneExpiryTime | nvarchar(32) | The expiry time for contact is calculated based on the time zone and filled in this field. |
| CiscoTimezonebias | nvarchar(128) | This is the time zone bias for API contacts. |
| CiscodstObsereved | Boolean | Flag to determine if the contact time zone is under Daylight Saving Time (DST). True if under DST False if not under DST |
| CampaignCategoryName | nvarchar(64) | The campaign category name associated to this campaign. |
| CampaignCategoryID | int | The mapped campaign category ID. |
| AuthScheduleRetry | int | The number of tries allowed for Identity Authentication. |
| DeviceID | nvarchar(255) | The device ID used for Identity Authentication. |
| CallerID | nvarchar(64) | The caller ID was identified by ANI. |
| DialerAgentCallback | bit | This determines if a callback request was set by a clicker agent or an external agent. |
| OverridePEWCValidation | bit | It is used to determine if customer has permitted autodialing. This enables immediate delivery of contact without validating for PEWC. |
| DialerID | int | This is the dialer ID assigned by the application when a dialer is created. |
| PaceID | int | This is the ID assigned to the pacing mode (Preview, Progressive, Predictive, etc.) when creating a campaign. |
| CampaignGroup | nvarchar(64) | This is the Campaign Group name as created by the user or synchronized from the dialer. |
| FilterConditionID | int | This is the auto-generated ID when a user creates filter conditions for the application to override the Group settings at the campaign level. This is applicable only for overriding CLI, Answering Machine |

| | | Treatment, and Abandoned Call Treatment. |
|---|---|---|
| DialerAttributes | nvarchar | This column contains all the pacing mode properties configured for a Campaign Group in a JSON string format. The default value is CampaignGroup. |
| DialerAttributesModifiedBy | nvarchar | This is the entity name that overrides the group settings at the campaign level. For example, if the group settings are overridden by a pre-call script, this contains PreCallScript as the entry. The default value is CampaignGroup. |

## Post-call Scripts

### Post Call Script Before

| Post-call Script Before | Data Type | Description |
|---|---|---|
| RecoveryKey | float | Unique ID to reschedule a contact. (Refer t_Dialer_Detail table) |
| CampaignGroupID | nvarchar(64) | Cisco Campaign Group ID, This is an Internal ID of Campaign Group (refer Obd_Campaign_Group table). |
| CampaignID | nvarchar(64) | Name of the Campaign |
| Phone | nvarchar(64) | Phone number to which the call will be dialed (or) Email ID to which the email will be sent. |
| ContactID | nvarchar(128) | Unique ID for a Campaign. |
| CallResult | int | Outcome of the contact attempt (either Telephony or Business Outcome). |
| ModeID | int | Internal ID of Mode Name (refer OBD_Modes table). |
| ContactRetries | int | Attempts made for the contact so far. |
| ModeRetries | int | The number of tries in the same mode. This is reset when dialing switches to the different mode. |
| OutcomeRetries | int | The number of attempts agent sets the same outcome. For Telephony Outcome, It is reset when mode switches. For Business Outcome, the |

| | | |
|---|---|---|
| | | counter is not reset even mode switches. |
| TimeZoneID | int | Internal ID of Time Zone Name (refer OBD_ TimeZone table). |
| ValidModes | nvarchar(256) | Number of Modes available for a contact. This field holds the value of List of Mode ID, separated by the pipe character |
| DailyRetries | int | The number of attempts dialed today. It is reset when day changes. |
| CycleRetries | int | The number of cycles completed. (When all modes for a contact is dialed once then it considered as cycle completed. The next cycle commences after this.) |
| IsProcessOutcome | | Flag to determine which outcome is to be processed. This flag is mainly used for Dual Outcome. When agent sets both Telephony and Business Outcomes, the flag is: True for Telephony Outcome - is used to reschedule the contact. False for Business Outcome - is used only for reporting and chaining. |
| CallType | int | 0 - Regular |
| ConditionID | int | The CSS Condition through which the contact is picked up for dialing. This is an internal ID (refer Obd_CustomFilter table). |
| BussFld1 to BussFld20 | nvarchar(128) | Value of Business field1 to Value of Business field20 |
| BussFld21 to BussFld26 | nvarchar(max) | Value of Business field21 to Value of Business field26 |
| ContactDetail | nvarchar(max) | Optional Business field value. This field holds the value in the XML type. |
| GID | int | Global List ID. |
| ListID | int | List ID (Unique ID for a Campaign). |
| ChildListID | int | This is secondary list ID. The child list ID is different within a list while records are appended again after list is generated. |
| AgentComments | nvarchar(4000) | Comments set by an agent during the conversation with the customer. |
| TargetAmount | float | Sale made for the interaction. This is set by an agent after completing the conversation with customer. |
| ContactPriority | int | Priority of the contact. This is incremented / |

| | | decremented based on the outcome received (Telephony / Business Outcome). |
|---|---|---|
| Agentperipheralnumber | nvarchar(32) | Agent ID of the agent who has handled this attempt. |
| Skillgroupskilltargetid | int | Skill Group ID, used only for the Cisco dialer. |
| Routercallkey | int | This is specific to Cisco UCCE. This is a unique ID that is created once a day. |
| Routercallkeyday | int | This is specific to Cisco UCCE. This is a unique ID that is created once a day. (This number will not duplicate for a specific day.) |
| ChannelType | int | Channel Type of the Mode. 1 - SMS 2 - Voice 3 - Email |
| DialerDateTime | DateTime | The date and time when dialing is completed. |
| DeliveredType | nvarchar(32) | A contact delivery type - either through a dialer or as Non-PEWC. |
| TargetCampaignGroup | nvarchar(64) | A Cisco Campaign to which the contact is delivered to. This is used only for Shared List campaigns. |
| AccountNumber | nvarchar(30) | A Unique ID that is generated during contact delivery. This is the ID used for interactions between the dialer and the application. |
| UserID | nvarchar(32) | This field is no longer used. |
| ContactTries | tinyint | Attempts made for the contact so far. |
| CallbackRegisteredType | int | A Type of callback the agent has set. 2 - Regular Callback |
| CallBackDateTime | nvarchar(50) | The date and time when a callback is requested by the customer. |
| DeliveredTime | DateTime | The date and time when the contact is delivered to dialer. |
| CallDuration | bigint | The duration, in minutes, that an agent was in an interaction with the customer. |
| CallBackRetries | int | Number of attempts receiving "Agent Reservation Failure" as an outcome. This is used to switch the contact from PCB to NCB. |
| ScheduledDeliveryTime | DateTime | |

| ICMId | int | List ID (Unique ID for a Campaign). |
|---|---|---|
| IsPostCallScript | bit | Flag to check if a post-call Script is available. |
| IsWireless | bit | Flag to check if the contact number is Wireless contact. |
| CallReferenceID | nvarchar(35) | This is Unique ID. This field is used to identify the dual outcome when the records go to Call Activity. |
| ICRCallKey | int | No longer used. |
| PeripheralCallKey | int | No longer used. |
| RouterCallKeySequenceNumber | int | No longer used. |
| ReservationCallDuration | int | No longer used. |
| PreviewTime | DateTime | No longer used. |
| DialingMode | nvarchar(32) | No longer used. |
| SFUID | nvarchar(max) | This is an internal ID for the user who has Sales Force access (refer Obd_User table). This field is mainly used to identify the user who downloaded the contact from the Service Cloud Voice. |
| SFLeadId | nvarchar(256) | This is the Salesforce Lead ID. This ID is filled when contacts are downloaded from the Service Cloud Voice CRM. |
| SFContactId | nvarchar(256) | This is the Salesforce Contact ID. This ID is filled when contacts are downloaded from the Service Cloud Voice. |
| SFCampaignId | nvarchar(256) | This is the Salesforce Campaign ID. This ID is filled when contacts are downloaded from the Service Cloud Voice. |
| CallBackRequestedBy | nvarchar(64) | Agent ID who has requested for a callback |
| CallBackAttemptType | nvarchar(3) | The type of callback contacts the system has delivered to dialer.<br><br>1 - PCB<br><br>2 - NCB |
| Campaignkey | int | A Unique ID for the Campaign (refer Obd_Campaign Table) |
| PreviousLeadScore | int | Lead Score of the contact before the current attempt. |
| CurrentLeadScore | int | Lead Score of the contact after the current attempt. |

| ResetContactLeadScore | bit | Flag to know whether the lead score has been reset in this attempt. |
|---|---|---|
| CallbackMode | | A Mode ID to which the callback should be made. |
| PhoneNumber | nvarchar(64) | A Contact Number that was dialed. |
| IsPhoneNoDNC | bit | Flag to identify whether the DNC is marked for this Phone Number. This will be set by an Agent. |
| BussfldDNCValue | nvarchar(max) | The value of the business field which is marked for DNC which blocks the contact. |
| Blockedby | nvarchar(100) | This is to identify what blocks a contact as DNC (either Business Field DNC / Phone Number) |
| IsInbound | bit | A flag to identify if this call is an Inbound call. |
| OUTCOMEGROUP | nvarchar(32) | Outcome Group Name. |
| OUTCOMEID | int | This is an internal ID for the Outcome (refer Obd_Outcome table). |
| DeviceID | nvarchar(255) | The ID of the device used for Identity Authentication. |
| DNCBlockedStartDate | datetime | The contact is blocked as DNC commencing this date. |
| DNCBlockedEndDate | datetime | The DNC block for the contact ends on this date. |
| DNCType | nvarchar(10) | The DNC type - whether global or for a specific campaign. |
| Status | int | The status of the contact after the Reschedule algorithm is executed. |
| ZONENAME | nvarchar(max) | The zone name of the mode. The current mode that the contact has picked. |
| Zipcode | nvarchar(32) | The Zip Code of the contact. |
| Uploadedtime | datetime | The date and time when the contacts are uploaded. |
| DialerAgentCallback | bit | This indicates who has set a specific callback - external agent or clicker agent. |
| OverridePEWCValidation | bit | It is used to determine whether a customer has permitted to auto dialing for one immediate delivery, without PEWC validation. |
| SMSTransactionCount | int | The number of SMS transactions for the contact. |
| StateLawGroupName | nvarchar(128) | The State Law Group name. |
| BussfldDNCValue1 | nvarchar(128) | This is the business field based on which a contact is marked as DNC. |

| IdentityAuthenticationEnabled | bit | This indicates if the contact is enabled for Identity Authentication or not. |
|---|---|---|
| TotalPrimaryAuth | int | The number of fields enabled to authenticate of a contact via a primary authentication. For example, three fields - mother's name, date of birth, and debit card number may be verified for authentication. |
| VerifiedPrimaryAuth | bit | This indicates whether the primary authentication was successful or not. |
| TotalSecondaryAuth | int | The number of fields enabled to authenticate of a contact via a secondary authentication. For example, two fields - SSN and debit card PIN may be verified for authentication. |
| VerifiedSecondaryAuth | bit | This indicates whether the secondary authentication was successful or not. |
| CampaignCategoryID | int | The campaign category ID. |
| DNCCampaignCategoryID | nvarchar(max) | The DNC category ID. |
| CampaignCategoryName | nvarchar(64) | The campaign category name. |
| DiallerReferenceID | nvarchar(64) | This is a unique ID referring to the dialer that dials out the call. |
| CallID | nvarchar(64) | This is a unique ID. This is used to identify the call with dual outcome when the records are moved to the Call Activity table. |
| BUSINESSOUTCOME | int | This is related to the "RetValue" field. While "RetValue" is set to false, it is mandatory tor the agent to set the Business/Telephony outcome when it is desired to prevent the contact from dialing. |
| DELETED | int | This indicates if the outcome is deleted or is still a valid outcome. |
| RPCType | nvarchar(8) | This indicates the Right Party Connect (RPC) type. |
| IncrementRetries | bit | This flag determines if the retries count should be incremented for the current attempt of the contact. |
| GlobalRetry | bit | This flag determines if the global retries count should be incremented for the current attempt of the contact. |
| DailyRetry | bit | This flag determines if the daily retries count should be incremented for the current attempt |

| | | of the contact. |
|---|---|---|
| ModeRetry | bit | This flag determines if the mode retries count should be incremented for the current attempt of the contact. |
| OutcomeRetry | bit | This flag determines if the outcome retries count should be incremented for the current attempt of the contact. |
| AgentView | bit | This flag determines if the outcome can be viewed by the agent or not. |
| DefaultOffset | int | This the default time zone offset from GMT for the contact. |
| DefaultCloseContact | bit | This is the flag to indicate if the contact should be closed based on the outcome set by the agent. |
| DefaultMaxRetry | int | This flag determines if the maximum retries count should be incremented for the current attempt of the contact. |
| DialerID | int | This is the dialer ID assigned by the application when a dialer is created. |
| PaceID | int | This is the ID assigned to the pacing mode (Preview, Progressive, Predictive, etc.) when creating a campaign. |
| CampaignGroup | nvarchar(64) | This is the Campaign Group name as created by the user or synchronized from the dialer. |

**Post-call Script After**

| Post-call Script After | Data Type | Description |
|---|---|---|
| CampaignGroupID | nvarchar(64) | Cisco Campaign Group ID, this is an Internal ID of Campaign Group (refer Obd_Campaign_Group table). |
| CampaignID | nvarchar(64) | Unique ID for a campaign. |
| DialPlanName | nvarchar(64) | Contact Strategy that is used to reschedule the contact for this attempt. |
| ContactId | nvarchar(128) | Unique ID for a contact. |
| ModeId | int | Internal ID of Mode Name (refer OBD_Modes table). |
| RescheduleModeId | int | A mode ID to which the contact is rescheduled for the next attempt. |

| CallStartDate | DateTime | Rescheduled Call Start Date. |
|---|---|---|
| CallEndDate | DateTime | Rescheduled Call End Date. |
| ContactRetries | int | Attempts made for the contact so far. |
| DailyRetries | int | The number of attempts dialed today. It is reset when day changes. |
| ModeRetries | int | The number of tries in the same mode. This is reset when dialing switches to the different mode. |
| OutcomeRetries | int | The number of attempts agent sets the same outcome.<br><br>For Telephony Outcome, It is reset when mode switches.<br><br>For Business Outcome, the counter is not reset even mode switches. |
| CycleRetries | int | The number of cycles completed. When all modes for a contact is dialed once then it considered as cycle completed. The next cycle commences after this. |
| Outcome | int | Outcome of the contact attempt such as Telephony or Business Outcome. |
| Status | int | The status of the contact after executing the Reschedule algorithm. |
| ContactNumber | nvarchar(64) | Phone number to which the call will be dialed (or) Email ID to which the email will be sent. |
| ValidModes | nvarchar(256) | Number of Modes available for a contact. This field holds the value of List of Mode ID, separated by the pipe character. |
| IsProcessOutcome | | Flag to determine which outcome is to be processed. This flag is mainly used for Dual Outcome.<br><br>When agent sets both Telephony and Business Outcomes, the flag is:<br><br>True for Telephony Outcome - is used to reschedule the contact.<br><br>False for Business Outcome - is used only for reporting and chaining. |
| CallID | | This is Unique ID. This field is used to identify the calls with dual outcome when the records go to Call Activity. |

| RefCallID | | This is used only for calls with dual outcome. The primary outcome Call ID is copied here. |
|---|---|---|
| RetainPCB | | The flag that identifies if the Callback should stay with the same agent. |
| IsCallback | | The flag that identifies if the attempt is made for callback. |
| ConditionID | int | The CSS Condition through which the contact is picked up for dialing. This is an internal ID (refer Obd_CustomFilter table). |
| BussFld1 to BussFld20 | nvarchar(128) | Value of Business field1 to Value of Business field20 |
| BussFld21 to BussFld26 | nvarchar(max) | Value of Business field21 to Value of Business field26 |
| ContactDetail | nvarchar(max) | Optional Business field value. This field will hold the value in XML type. |
| GID | int | Global List ID |
| ListID | int | ListID (Unique ID for a Campaign). |
| ChildListID | int | This is secondary list ID. The child list ID is different within a list while records are appended again after list is generated. |
| AgentComments | nvarchar(4000) | Comments set by an agent during the conversation with the customer. |
| TargetAmount | float | Sale made for the interaction. This is set by an agent after completing the conversation with customer. |
| DeliveredType | int | A contact delivery type - either through a Dialer or as Non-PEWC. |
| TargetCampaignGroup | nvarchar(32) | A Cisco Campaign to which the contact is delivered to. This is used only for Shared List campaigns. |
| ContactPriority | int | Priority of the contact. This is incremented / decremented based on the outcome received (Telephony / Business Outcome). |
| Agentperipheralnumber | int | Agent ID of the agent who has handled this attempt. |
| Skillgroupskilltargetid | int | Skill Group ID, used only for the Cisco dialer. |
| ChannelType | int | Channel Type of Mode. 1 - SMS 2 - Voice |

| | | 3 - Email. |
|---|---|---|
| DialerDateTime | DateTime | The date time at which the dialing is completed. |
| CampaignGroupName | nvarchar(32) | Name of the dialer Campaign (Campaign Group) |
| AccountNumber | nvarchar(64) | It is a unique ID to identify a call attempt for a contact. |
| CallType | nvarchar(30) | 0 - Regular<br><br>1 - Callback<br><br>2 - AEM |
| UserID | nvarchar(32) | No longer used. |
| ContactTries | tinyint | An attempt the contact has completed so far. (Excluding the current attempt) |
| CallbackRegisteredType | int | A Type of callback the agent is set for.<br><br>1 - Personal Callback<br><br>2 - Regular Callback |
| CallBackDateTime | nvarchar(50) | The date time at which the callback is requested by the customer. |
| DeliveredTime | DateTime | A date time at which the contact is delivered to dialer. |
| Duration | bigint | Talk time between Agent and Customer. This is shows in Minutes. |
| CallStartDateTime | DateTime | The date and time that agent answers the call. |
| ScheduledDeliveryTime | DateTime | The time when the contact is set for delivery, even though the actual delivery happens at a different time. |
| CallbackRetries | int | Number of attempts receiving "Agent Reservation Failure" as an outcome. This is used to switch the contact from PCB to NCB. |
| ActivityID | int | No longer used. |
| ICMId | int | ID from which ICM this attempt is made. This is used only for Tenant module. |
| IsAuthorized | | No Longer used. |
| IsPostCallScript | | Flag to check if a post-call script is available. |
| IsWireless | bit | Flag to check if the contact number is Wireless contact. |
| CallReferenceID | nvarchar(32) | No longer used. |
| ICRCallKey | int | No longer used. |

| PeripheralCallKey | int | No longer used. |
|---|---|---|
| RouterCallKeyDay | int | This is specific to Cisco UCCE. This is a unique ID that is created once a day. (This number will not duplicate for a specific day.) |
| RouterCallKey | int | This is specific to Cisco UCCE. This is a unique ID that is created once a day. |
| RouterCallKeySequenceNumber | int | No longer used. |
| ReservationCallDuration | bigint | No longer used. |
| PreviewTime | DateTime | No longer used. |
| DialingMode | nvarchar(32) | No longer used. |
| SFUID | nvarchar(MAX) | This is an internal ID for the user who has Sales Force access (refer Obd_User table). This field is mainly used to identify the user who down-loaded the contact from the Service Cloud Voice. |
| SFLeadId | nvarchar(256) | This is the Salesforce Lead ID. This ID is filled when contacts are downloaded from the Service Cloud Voice. |
| SFContactId | nvarchar(256) | This is the Salesforce Contact ID. This ID is filled when contacts are downloaded from the Service Cloud Voice. |
| CallBackRequestedBy | nvarchar(64) | Agent ID who has requested for a callback. |
| CallBackAttemptType | nvarchar(3) | The type of callback contacts system has delivered to dialer. 1 - PCB 2 - NCB |
| IsCurrentCycleCompleted | int | A flag to identify whether the current cycle is completed. |
| CurrentCycle | int | Cycle count of the current cycle. |
| Campaignkey | int | A Unique ID for the Campaign (refer Obd_Campaign Table) |
| PreviousLeadScore | int | Lead Score of the contact before the current attempt. |
| CurrentLeadScore | int | Lead Score of the contact after the current attempt. |
| StatusReasonId | int | Internal ID for Status Description (refer Obd_ContactStatusCode table). |
| StatusChangedBy | nvarchar(256) | The module that has changed the status of the contact. |
| StatusChangedAt | DateTime | The date and time when the status is changed for contact. |

| ActualCValue | nvarchar(256) | Original Cvalue. This excludes the Campaign Prefix. |
|---|---|---|
| DNCBussField | nvarchar(256) | The value of the business field which is marked for DNC which blocks the contact. |
| BlockedBy | nvarchar(256) | This is to identify what blocks a contact as DNC (either Business Field DNC / Phone Number) |
| IsInbound | bit | A flag to identify this attempt is to consider for Inbound. |
| DailyRetriesValue | int | Number of attempts made today (Including Current attempts). |
| IncrementRetriesForInbound | bit | A flag to identify whether the Daily retries should be incremented for the current attempt of the contact. |
| DeviceID | nvarchar (255) | The ID of the device used for Identity Authentication. |
| DNCBlockedStartDate | DateTime | The contact is blocked as DNC commencing this date. |
| DNCBlockedEndDate | DateTime | The DNC block for the contact ends on this date. |
| DNCType | nvarchar(10) | The DNC type for global or a specific campaign. |
| ZONENAME | nvarchar(max) | The mode's zone name. The current mode that the contact has picked. |
| Zipcode | nvarchar(32) | The Zip Code of the contact. |
| Uploadedtime | DateTime | The date and time when the contacts are uploaded. |
| DialerAgentCallback | bit | This indicates who has set a specific callback - external agent or clicker agent. |
| OverridePEWCValidation | bit | It is used to determine whether a customer has permitted to auto dialing for one immediate delivery, without PEWC validation. |
| SMSTransactionCount | int | The number of SMS transactions for the contact. |
| StateLawGroupName | nvarchar(128) | The State Law Group name. |
| BussfldDNCValue1 | nvarchar(128) | This is the business field based on which a contact is marked as DNC. |
| IdentityAuthenticationEnabled | bit | This indicates if the contact is enabled for Identity Authentication or not. |
| TotalPrimaryAuth | int | The number of fields enabled to authenticate of a contact via a primary authentication. For example, three fields - mother's name, date of birth, and debit card number may be verified for |

| | | authentication. |
|---|---|---|
| VerifiedPrimaryAuth | bit | This indicates whether the primary authentication was successful or not. |
| TotalSecondaryAuth | int | The number of fields enabled to authenticate of a contact via a secondary authentication. For example, two fields - SSN and debit card PIN may be verified for authentication. |
| VerifiedSecondaryAuth | bit | This indicates whether the secondary authentication was successful or not. |
| CampaignCategoryID | int | The campaign category ID. |
| DNCCampaignCategoryID | nvarchar(max) | The DNC category ID. |
| CampaignCategoryName | nvarchar(64) | The campaign category name. |
| DiallerReferenceID | nvarchar(64) | This is a unique ID referring to the dialer that dials out the call. |
| BUSINESSOUTCOME | int | This is related to the *RetValue* field. While *RetValue* is set to false, it is mandatory tor the agent to set the Business/Telephony outcome when it is desired to prevent the contact from dialing. |
| DELETED | int | This indicates if the outcome is deleted or is still a valid outcome. |
| RPCType | nvarchar(8) | This indicates the Right Party Connect (RPC) type. |
| GlobalRetry | bit | This flag determines if the global retries count should be incremented for the current attempt of the contact. |
| DailyRetry | bit | This flag determines if the daily retries count should be incremented for the current attempt of the contact. |
| ModeRetry | bit | This flag determines if the mode retries count should be incremented for the current attempt of the contact. |
| OutcomeRetry | bit | This flag determines if the outcome retries count should be incremented for the current attempt of the contact. |
| AgentView | bit | This flag determines if the outcome can be viewed by the agent or not. |
| DefaultOffset | int | This the default time zone offset from GMT for the contact. |
| DefaultCloseContact | bit | This is the flag to indicate if the contact should |

| | | be closed based on the outcome set by the agent. |
|---|---|---|
| DefaultMaxRetry | int | This flag determines if the maximum retries count should be incremented for the current attempt of the contact. |
| DialerID | int | This is the dialer ID assigned by the application when a dialer is created. |
| PaceID | int | This is the ID assigned to the pacing mode when creating a campaign. |
| CampaignGroup | nvarchar(64) | This is the Campaign Group name as created by the user or synchronized from the dialer. |

# Group

Click **System** in the menu pane on the left to open the System Configuration page. To see all configuration items on the System menu, click the System Menu button.

## Access a Group

1. Click **Group** in the menu pane on the left to open the Group page. The grid contains the Group, Campaign Group name, Pacing Mode, Group Type, Group Status, and Actions.

2. Using the Expand button on the left of the grid, to expand the group to see the campaigns belonging to the Campaign Group.

3. The campaigns are listed along with the Deliverable Percentage for each. Deliverable Percentage is the percentage of contacts that are to be delivered to the campaigns. This helps you control which campaign gets priority for dialing out contacts. You could set the deliverable percentage as 75 percent for one campaign and 25 percent for another. The campaign that has 75 percent deliverable gets more contacts to be dialed. However, where two campaigns are designated as 100 percent deliverable, the first campaign listed gets its contacts delivered for dialing. Only after the first campaign has exhausted all its contacts, does the second campaign get contacts to dial. To change this, you can drag and drop the campaigns and re-order them.

4. To change the Deliverable Percentage, click the Edit button under the Action column and change the Deliverable Percentage.

5. Click Save in the Actions column to complete the change.

# Add A Voice Campaign Group

To configure a Campaign Group:

## Preview Pacing Mode

1. Click **Edit** in the Action column for the listed campaign group you want to configure.

2. The **Campaign Details** section contains the (Campaign Group – Campaign on the Webex Contact Center dialer). This is for the Preview mode.

   a. Enter a Name.

   b. Enter a Description.

   c. Select a Dialer Name from the dropdown list.

   d. Select an Entry Point from the dropdown list.

   e. Navigate to the Global Business Parameters section and complete selecting the Global Business Parameters for the group.

   f. Navigate to the Dialer Details section.

3. In the **Dialer Details** section, provide the following details if you are selecting the Pacing Mode as Preview:

   a. Enter an Outbound Caller ID.

   b. All the Available Teams are listed. Select the Teams that handle preview calls and click > to move them as Assigned Teams. You can select multiple teams. To select all teams, click >>.

   c. Click Save and navigate to the Contact Parameters section.

      **Note**: To instantly access descriptions of fields in the **Dialer Details** section, click the **Help** icon.

## Progressive Pacing Mode

1. Complete the **Campaign Details** section as below if you are selecting the Pacing Mode as Progressive:

   a. Enter a Name.

   b. Enter a Description.

   c. Select a Dialer Name from the dropdown list.

   d. Select an Entry Point from the dropdown list.

e.  Navigate to the Global Business Parameters section and complete selecting the Global Business Parameters for the group.

f.  Navigate to the Dialer Details section.

2.  In the **Dialer Details** section, provide the following details if you are selecting the Pacing Mode as Progressive:

a.  Enter an Outbound Caller ID.

b.  Use the slider or enter a Dial Rate. This is the number of contacts to dial out for each agent. For example, if this value is 5 and there are ten agents logged in, the number of contacts dialed is limited to 50.

c.  Use the slider or enter a No Answer Ring Limit. This is the duration, in seconds, that the customer phone rings before a call is considered as No Answer.

**Note**: To instantly access descriptions of fields in the **Dialer Details** section, click the **Help** icon.

3.  In the **CPA Parameters** section, provide the following details if you are selecting the Pacing Mode as Progressive.

a.  If required, enable CPA Detection. If you enable CPA Detection, continue with settings. Else, navigate to Contact Parameters.

b.  If required, enable AMD Detection. This enables the application to detect if a call is routed to an Answering Machine.

c.  If required, enable Terminating Tone Detection. If enabled, the CPA waits to detect the termination tone of a voice mail before ending the call.

d.  Use the slider or enter a Min Silence Period. This is the time, in milliseconds, for the application to classify a call as voice detected.

e.  Use the slider or enter an Analysis Period. This is the time, in milliseconds, that the application spends to analyze the call – the time for CPA.

f.  Use the slider or enter a Min Valid Speech. This is the time, in milliseconds, of continuous voice on the call to classify the call as voice detected.

g.  Use the slider or enter a Max Time Analysis. This is the maximum time, in milliseconds, for the application to identify a problem as dead air.

h.  Use the slider or enter a Max Term Tone Analysis. This is the time, in milliseconds, for the application to spend analyzing an answering machine voice message as terminated.

i.  Click Save and navigate to the Contact Parameters section.

**Note**: To instantly access descriptions of fields in the **CPA Parameters** section, click the **Help** icon.

**Predictive Pacing Mode**

1. Complete the **Campaign Details** section as below if you are selecting the Pacing Mode as Predictive:

   a. Enter a Name.

   b. Enter a Description.

   c. Select a Dialer Name from the dropdown list.

   d. Select an Entry Point from the dropdown list.

   e. Navigate to the Global Business Parameters section and complete selecting the Global Business Parameters for the group.

   f. Navigate to the Dialer Details section.

2. In the **Dialer Details** section, provide the following details if you are selecting the Pacing Mode as Predictive:

   a. Enter an Outbound Caller ID.

   b. Use the slider or enter a Dial Rate. This is the number of contacts to dial out for each agent. For example, if this value is 5 and there are ten agents logged in, the number of contacts dialed is limited to 50.

   c. Use the slider or enter a No Answer Ring Time. This is the duration, in seconds, that the customer phone rings before a call is considered as No Answer.

   d. Use the slider or enter a Max Dialing Rate. This is the number of contacts that are delivered to the dialer per logged-in agent. If the number of logged-in agents is 7 and you set the Max Dialing Rate as 2, the application delivers 14 contacts to the dialer.

   e. Use the slider or enter an Abandoned Rate Percentage. This setting limits the percentage of calls that can be abandoned. If the percentage exceeds this value, the call abandoned rate to this value by reducing the number of calls to dial.

   f. Use the slider or enter a Predictive Correction Pace. It is the rate at which the dialer adjusts the dialing after a specified live connections are reached. The higher this number, the less frequently this adjustment happens.

   g. Use the slider or enter a Predictive Gain factor. The factor defines the increase dialing rate if successful calls are not received as expected.

   h. User the slider or enter a Reservation Percentage. This is the number of logged-in agents that the application has to reserve for campaigns mapped to this group.

   **Note**: To instantly access descriptions of fields in the **Dialer Details** section, click the **Help** icon.

3. In the **CPA Parameters** section, provide the following details if you are selecting the Pacing Mode as Predictive.

a. If required, enable CPA Detection. If you enable CPA Detection, continue with settings. Else, navigate to Contact Parameters.

b. If required, enable AMD Detection. This enables the application to detect if a call is routed to an Answering Machine.

c. If required, enable Terminating Tone Detection. If enabled, the CPA waits to detect the termination tone of a voice mail before ending the call.

d. Use the slider or enter a Min Silence Period. This is the time, in milliseconds, for the application to classify a call as voice detected.

e. Use the slider or enter an Analysis Period. This is the time, in milliseconds, that the application spends to analyze the call – the time for CPA.

f. Use the slider or enter a Min Valid Speech. This is the time, in milliseconds, of continuous voice on the call to classify the call as voice detected.

g. Use the slider or enter a Max Time Analysis. This is the maximum time, in milliseconds, for the application to identify a problem as dead air.

h. Use the slider or enter a Max Term Tone Analysis. This is the time, in milliseconds, for the application to spend analyzing an answering machine voice message as terminated.

i. Click Save and navigate to Contact Parameters section.

**Note**: To instantly access descriptions of fields in the **CPA Parameters** section, click the **Help** icon.

## Contact Parameters

1. In the **Contact Parameters** section, specify the following information:

a. Initial Number of Contacts is the number of contacts you intend to send to the Dialer initially. Use the slider to set a number.

b. Increment By % is the percentage by which you intend increasing the contact delivery to the Dialer. You might want to increase this because the Dialer is dialing out calls at a rate faster than expected and is running out of contacts.

c. Decrement By % is the percentage by which you intend decreasing the contact delivery to the Dialer. You might want to decrease this because the Dialer is dialing out calls at a rate slower than expected and is accumulating contacts to be dialed out.

d. Upper Threshold % is the upper limit as a multiple of Initial Number of Contacts that can be delivered to the Dialer.

e. Navigate to the Global Business Parameters section and complete selecting the Global Business Parameters for the group.

f. Navigate to the **Dialer Details** section.

2. In the **Time Zone** section, select a check box for each time zone you require for this campaign group.

3. For each selected time zone, select a Start Time and End Time from the dropdown lists.

## Add A Manual Campaign Group

*Note: Contact Cisco CSM to enable this configuration.*

You can also add a manual campaign group to the Campaign Manager application. These are dialer-independent campaign groups. You can create campaigns and map them to these manual campaign groups. All the campaign functionalities work as explained in the Campaign chapter. The only difference is that the contacts, instead of being delivered to a dialer, are placed in a separate table. Some APIs access these contacts and take action as required - delivered to a dialer for dialing, sent as a list to an agent for manual dialing, etc. Once the outcomes are set, there are APIs that pick the outcomes and perform further activity as configured in the campaign.

1. Enter a Campaign Group name.

2. Enter a Description.

3. Click Save and continue.

4. Complete the Contact Parameters, Time Zone, and Contact Parameters – Agent Mapping sections.

5. In the **Contact Parameters** section, specify the following information:

    a. Initial Number of Contacts is the number of contacts you intend to send to the Dialer initially. Use the slider to set a number.

    b. Increment By % is the percentage by which you intend increasing the contact delivery to the Dialer. You might want to increase this because the Dialer is dialing out calls at a rate faster than expected and is running out of contacts.

    c. Decrement By % is the percentage by which you intend decreasing the contact delivery to the Dialer. You might want to decrease this because the Dialer is dialing out calls at a rate slower than expected and is accumulating contacts to be dialed out.

    d. Upper Threshold % is the upper limit as a multiple of Initial Number of Contacts that can be delivered to the Dialer.

6. In the **Time Zone** section, select a check box for each time zone you require for this campaign group. For more information, see Time Zones, on page 41.

7. For each selected time zone, select a Start Time and End Time from the dropdown lists.

# System Configuration

The System Configuration controls various global capabilities in Campaign Manager.

Access to the System Configuration page is subject to Role-based Access Control (RBAC). The link to the page displays in the administration module only if you have been granted the privilege associated with it.

All the system configurations are accessed using System menu. You can create new configuration or update existing configurations. To make changes, edit the relevant fields and click **Save**. Changes take effect immediately.

System configuration provides the following features:

### Modes

Modes refer to the method or communication channel application uses to interact with a customer. Campaign Manager provides variety of support channels to choose from, including voice, email, text message (SMS), and more. User can customize a mode of communication as per requirement. To know more, click here.

### Time Zones

All times are stored in Coordinated Universal Time (UTC) and appear globally based on the system time zone. Time zones are configured at the time of installation and configured time zones are used as a campaign-specific time zones. These time zones can be scattered across different continents or even different locations in the same continent. To know more, click here.

### Compliance

Compliance allows user to upload Contact Number or business data such as Customer ID, Account Number and so on. A contact list is the file in which all contacts in the system are stored and organized. Uploaded contacts are stored into the database and validates them during contact upload or contact delivery. Once contacts are imported into the system, the contact list can be used for one, or many, sub-campaigns, depending upon your requirements. At the campaign level, a user can choose to validate compliance either at contact upload or contact delivery. To know more, click here.

### Global Upload

Global upload lets you upload a single lead list into multiple campaigns based on the criteria defined for each of these campaigns. It helps you to map the contact fields with the data type.

You may add additional conditions to the contact list by clicking plus next to the rule (Add Condition) and create additional condition sets. Condition within a condition set are ANDed together when evaluating the rule. Each condition is ORed with any other condition sets. To know more, click here.

### Business Outcome

A business outcome is the disposition set by an agent based on the wrap-up code the agent entered after interacting with a customer. By configuring a business outcome, you can define what happens to the contact after the agent selects a wrap-up code. You can configure the business outcome to close the contact if it is a success or fail. if the credit card holder declines to pay, the wrap- up code could be Declined To Pay, and you can set the business outcome as Failure. To know more, click here.

### Area and Zip Codes

Area and ZIP code maintains a master list of Zip codes and Area codes. Area and Zip codes are associates with corresponding States and Time zones. By associating, application adheres to local statutory requirements with respect to dialing out contacts at various times of the day, weekends, and so on. To know more, click here.

**State Law**

State Law defines the state codes and the callable time for each day of the week. Every region such as like states, countries, and so on, have laws that regulate contact center operations. You can configure these states laws to ensure that your contact center operations adhere to the statutes of the geographical regions they operate in.

If a state might have a regulation that no contact center can reach a contact between 8.00 PM and 6.00 AM. You can configure Campaign Manager to ensure that the contacts are delivered for dialing only outside these hours and rest assured that the contact will not be delivered in violation of a state law. To know more, click here.

**Holidays**

Holidays defines list of holidays based on various geographies on account of festivals, observances, birth anniversaries, and so on, and mapped with campaigns. These are days that the campaigns do not normally run. You can add holidays that are available across the entire application. Once added, you can map these holidays to various campaigns as required by the local geography. To know more, click here.

**URL**

URL allows to embed any custom page or a website into the application so as to launch the same from within Campaign Manager. This eliminates the need of browsing a frequently seen web page by opening another browser tab. To know more, click here.

**Profile**

Profiles are used to upload (including Global Upload) contacts, scrub contacts, or upload Compliance (DNC, NDNC, PEWC, or CPT) contacts. The various activities associated with such uploads, setting parameters, mapping various fields, and so on are handled at the profile level and are not required to be repeated at the time of upload. Profiles can be defined as shortcuts that help you through the entire gamut of contact- related uploads. Create and save various profiles. To know more, click here.

**Email Server**

Email servers define email properties for your instance and the email accounts that you set up. Your email service can also affect the successful transmission of incoming and outgoing email. Email administrators set up email accounts to allow the system to connect to external mail services such as POP3, SMTP, or IMAP servers.

After completing the setup Email sever on this page, you will be able to:

- Receive Email from your customers and allow agent to respond to them.
- Send email messages in your outbound campaigns.

To know more, click here.

**SMS Server**

You can configure your SMS Gateway servers for your application. Use these configured servers to send outbound SMS messages.

After completing the setup steps on this page, you will be able to:

- Receive SMS messages from your customers and allow an application or agent to respond to them.

- Send SMS messages in your outbound campaigns.

To know more, click here.

**Other Settings**

The other settings allows you to configure:

- Attempt Counter

- Global Business Parameters

- Dimension

- Alerter

**Reassign Agents**

This allows user to reassign an agents to a task. If a contact needs to be rescheduled to the agent availability date and time, you can reassign another agent to handle the call. There are two ways of selecting contacts, selecting contact directly and selecting contacts using filter conditions. To know more, click here.

**Export or Import Campaign**

Export or Import Campaign allows to export and import configuration of campaign. Importing or exporting a campaign includes only the Campaign page, System Configuration page, and the Contacts Strategy page for any given campaign. To know more, click here.

**Campaign Category**

A Campaign Category has a group of campaigns, which can be used to apply conditions such as DNC and NDNC. The Campaign Category allows to create and manage Campaign Categories. To know more, click here.

**CPaaS Provider Configuration**

**Note**: Currently, this feature is not supported in Webex Contact Center.

Campaign Manager supports running IVR (agent-less) campaigns using external CPaas service providers. user can configure the access credentials of the service provider. To know more, click here.

**API Keys**

This feature facilitate the secure access to third-party application that requires integrations with Campaign Manager for Cisco CCE. Basic Authentication enables access to the Service, Webservice, and Websocket Server applications. User can generate an API Key and a secret key to get a secure access to Campaign Manager. These keys help secure access to the API Manager. To know more, click here.

**High Availability Status**

High availability (HA) is a licensed feature. Campaign Manager uses cluster design for its high availability solution. Each Campaign Manager component is made redundant and is available at both clusters. During normal operation, both clusters would be running with one side in Active mode and other side in Stand-by mode. During a failure, the automatic failover process transfers the Stand-by cluster to Active mode and switches over the previously Active cluster to Stand-by mode. The two sides are meant only for redundancy, not load-balancing. To know more, click here.

## Modes

Modes refer to the method or communication channel used to interact with a customer.

**Note**: The application supports only Voice as the mode for the current release.

### Add Voice Mode

A voice mode can be created to reach a contact on a fixed Line (Home or Office or Other) or a Mobile (Home or Office or Other).

1. Click **Add Voice Mode**.

2. Enter a **Mode Name** and a **Description** of the mode.

3. Select a **Minimum Length** and a **Maximum Length** from the dropdown.

4. Click **Save**.

### Update a Mode

1. Select a mode and click **Edit** icon .

2. Update the details and click **Save**.

### Delete a Mode

1. Select a mode and click **Delete** icon.

2. Click **Ok** on the confirmation pop up.

### Fields

| Field | Description |
|---|---|
| Mode Name | Mode of communication |

| Description | Description of mode |
|---|---|
| Minimum and Maximum length | Allows to define minimum and maximum length of a mode |

## Time Zone

All times are stored in Coordinated Universal Time (UTC) and appear globally based on the system time zone. Time zones are configured at the time of Campaign Manager installation and configured time zones are used as campaign-specific time zones. User uses various time zones to run campaigns. These time zones can be scattered across different continents or even different locations in the same continent.

Time Zones are presented in the grid view and the map view. Enable or disable timezone to apply the timezone for a campaign. If a time zone is mapped to a campaign, you do not have option to disable the time zones.

**Grid View**

1. Navigate to the **Grid** view.

   Time Zone

   **Grid View**      Map View

   Showing 1 - 9 of 139 records

   | Campaign TimeZone | Description |
   |---|---|
   | (UTC+01:00) Brussels Copenhagen Madrid Paris | (UTC+01:00) Brussels, Copenhag |
   | (UTC+08:00) Taipei | (UTC+08:00) Taipei |
   | (UTC+05:00) Islamabad Karachi | (UTC+05:00) Islamabad, Karachi |
   | (UTC+10:00) Canberra Melbourne Sydney | (UTC+10:00) Canberra, Melbourn |
   | (UTC+09:00) Osaka Sapporo Tokyo | (UTC+09:00) Osaka, Sapporo, To |

2. Select the time zone and enable the time zone for a campaign.

**Map View**

1. Navigate to the **Map** view.
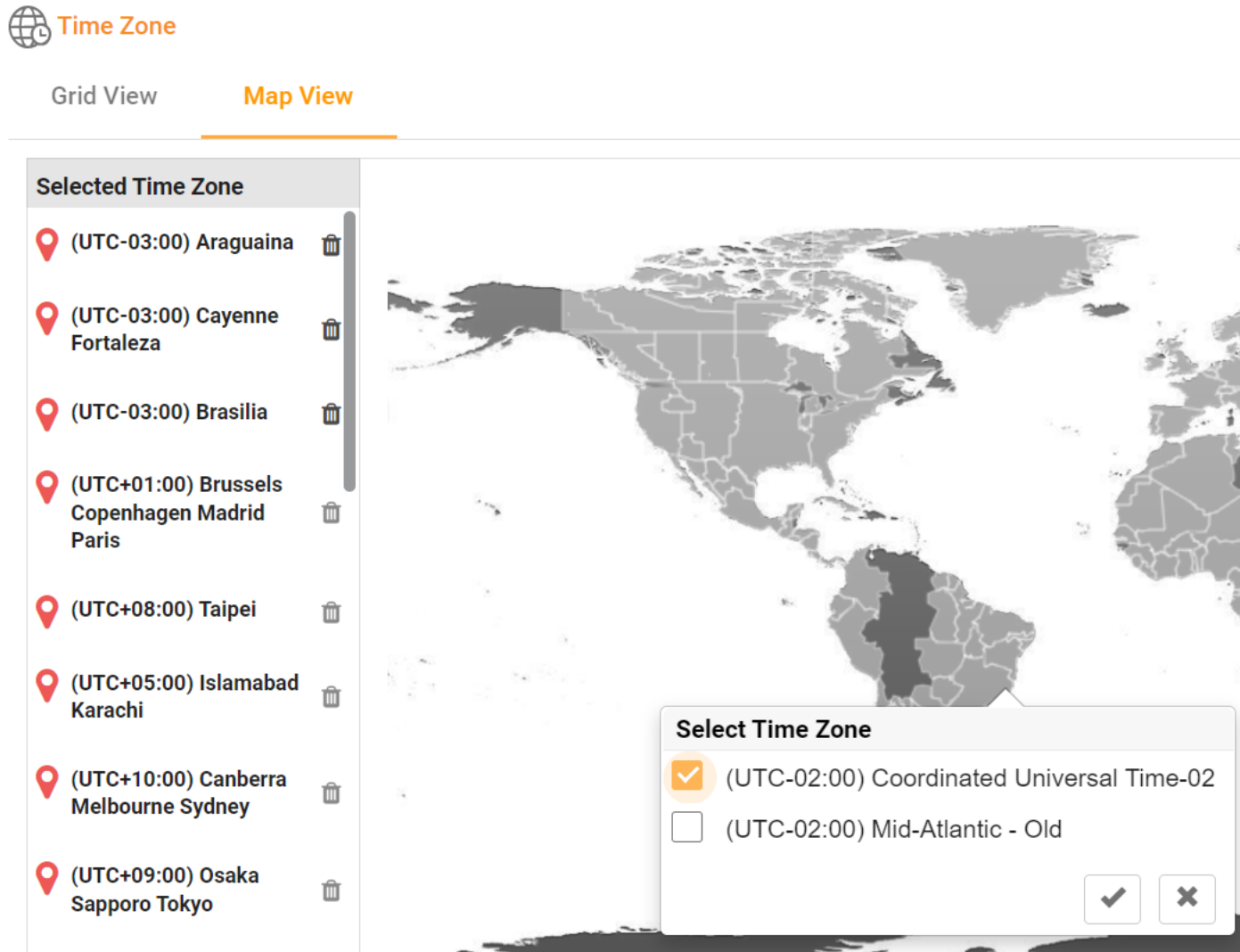


2. Click an area in the map. A pop up displaying all time zones for the selected longitude appears.

3. Click **OK** on the confirmation pop up.


**System Time Zone**

1. Navigate to the **System Time Zone**.

2. This selection allows the system to calculate the data for real-time Performance Metrics based on the specified time zone.

# Compliance

Compliance allows to upload the following type of contacts:

- Do Not Call (DNC) - The DNC registry is a list of numbers that have requested not to be disturbed by unwanted phone calls.

- National Do Not Call (NDNC) - This is DNC registry at the national level. If a number is registered under NDNC, no person or organization makes an unsolicited call or send an unsolicited SMS.

- Prior Express Written Consent (PEWC) - PEWC mandates that telemarketers obtain the prior express written consent of the called party for auto-dialed or prerecorded telemarketing calls to wireless numbers and prerecorded calls to residential landlines.

   **Note**: Contact Cisco CSM to enable this configuration.

- Customer Preferred Time (CPT) - This enables you configure three different customer-preferred calling times via your upload file. The application delivers the contact for dialing at the customer-preferred time. The time zones can also be configured as required.

   **Note**: Contact Cisco CSM to enable this configuration.


## Import File

1. Select the **Upload Type** and the **Import Mode** from the dropdown.

2. Select the **File type** from **Text/CSV** or **Custom**.

3. If the file type is a Text/CSV, select a **Delimiter**. Use any one of the following delimiters in your upload file: comma (,), dash (-), dollar ($), percent (%), pipe (|), circumflex or caret (^), ampersand (&), asterisk (*), and tab.

4. If the file type is custom, select the **Format** as **JSON**.

5. Click **Chose File to Import** and select a file.

   **Note**: If you are using the application in a localized language (other than English), save the contact file placed for upload in UTF-8 encoding.

6. If required a Profile[1] to upload, select from the dropdown list. For quick upload, see "Quick Upload" on page 99.

---

[1]A Profile is a template that stores the mapping of upload lists and compliance fields that can be reused every time both manual and auto uploading. All the configuration that governs your upload is saved into a named profile - File/Database upload, access credentials, business field mapping, ans so on, virtually everything associated with an upload. All you have to do is select the file path, select a profile, and upload.

**Field Mapping**

1. Navigate to the **Field Mapping** tab and select the following from the dropdown.

   a. Country Code - field in the upload file that must be mapped to country code.

   b. DNC Data - field mapped as filter for DNC data.

   c. Area Code - field that is mapped to area code.

   d. Channel Type - channel on which this DNC upload applies, such as voice, Email, or SMS.

2. If the upload type is DNC, enable the **DNC Duration** to select the duration from the upload file. To mark this contact as DNC permanently, enable DNC Forever.

   **Note**: The DNC Duration field is active only if the Upload Type is DNC.

3. Select the **Start Date** and the **End Date** if the **DNC Forever** field is not enabled.

4. If the upload type is **PEWC**, click one of **Consent** or **Non-Consent** to denote if the contact has to delivered as Consent (user provided consent) or Non-Consent as per the definition of Prior Express Written Consent.

5. If the upload type is **CPT**, select a time zone.

6. Select **Upload from File** if you want the CPT as specified in the contact upload file. Ensure your upload file has a time zone. Select the Time Zone and map a field from the uploaded file that is the Time Zone for CPT. Ensure that the Time Zone in your upload file is already available in your application.

7. Select **Use Area Code** to use the time zone of the Area Code as the CPT time zone.

8. Select **Day of Week** from the uploaded file in the dropdown for the customer-preferred day of the week to receive the call. Upload file must contain at least two initial consecutive letters for the day of the week such as Mo for Monday, Tu for Tuesday, and so on. This is a mandatory field.

9. Select a **Time Format** from HH:MM andHH:MM:XM. Time format must match that format given in the upload file.

10. Select a **Slot A Start Time**[1], **Slot A End Time**[2], Slot B Start Time[3], Slot B End Time[4], Slot C Start Time[5] and Slot C End Time[6].

   **Note**: It is not mandatory to select all three slots. However, if you select multiple slots, you must select them sequentially, first Slot A, then Slot B, and then Slot C.

### Compliance or Campaign Category

**Note**: This is an optional step.

1. Navigate to the **Compliance or Campaign Specific Category** tab and select the **Campaign Specific DNC** or the appropriate campaigns to apply the compliance for selective campaigns.

2. Select the **Category Specific DNC** and select the appropriate campaign categories to apply the compliance for selective campaign categories.

3. Click **Save**.

---

[1]Select the field to map to the customer-preferred slot start time for the first, or slot A. This is the time when the application delivers the contact to the dialer, subject to any statutory restrictions for dialing that are in force for this slot.
[2]Select the field to map to the customer-preferred slot end time for the first, or slot A. This is the time beyond which the contact is not delivered to the dialer.
[3]Select the field to map to the customer-preferred slot start time for the second, or slot B. This is required as the second of the three customer-preferred slots, should the first slot result in an unsuccessful call. This is the time when the application delivers the contact to the dialer. For example, if the Slot A timing is 8 am to 9 am, and the call could not be dialed out due to some restrictions or the customer being not reachable, it will be dialed out in the Slot B defined here, which could be 10 am to 11 am. Again, this is also subject to any statutory restrictions for dialing that are in force for this slot.
[4]Select the field to map to the customer-preferred slot end time for the second, or slot B. This is the time beyond which the contact is not delivered to the dialer.
[5]Select the field to map to the customer-preferred slot start time for the third, or slot C. This is required as the last of the three customer-preferred slots, should the first and second slots result in an unsuccessful call. This is the time when the application delivers the contact to the dialer. For example, if the Slot A timing is 8 am to 9 am, and the call could not be dialed out due to some restrictions or the customer being not reachable; the Slot B time is 10 am to 11 am and could not be dialed out for the same reasons, it will be dialed out in the Slot C defined here, which could be 2 pm to 3 pm. Again, this is also subject to any statutory restrictions for dialing that are in force for this slot.
[6]Select the field to map to the customer-preferred slot end time for the third, or slot C. This is the time beyond which the contact is not delivered to the dialer.

## Quick Search

1. Select the **Upload Type** and the **CategoryType**.

2. Enter the value to search. This is the telephone number of the contact marked as one of DNC, NDNC, or PEWC.

3. Click **Find**.

4. Select the check box for **Slot A**. Select the **Start Time** and **End Time** for the customer-preferred calling time for this slot. Click **OK**.

5. If you need another slot, select the check box for **Slot B**. Select the Start Time and End Time for the customer-preferred calling time for this slot. Click **OK**.

6. If you need a third slot, select the check box for **Slot C**. Select the **Start Time** and **End Time** for the customer-preferred calling time for this slot. Click **OK**.

## Quick Upload

For a quick upload:

1. Select the **Upload Type** and the **Channel Type**.

   **Note**: The channel type is not applicable for PEWC upload type.

2. Select the **Category** from dropdown.

3. Enter the **Compliance Data** such as DNC data, NDNC data, or PEWC data. Instead of the contact phone number, you can also enter the value for any Business Parameter marked as DNC. See Business Parameter.

4. Enable the **Valid Duration** to make the contact as DNC forever.

5. Enter the **Start Time** and the **End Time**. This contact remains marked as DNC for the selected period.

   **Note**: This is only applicable if the **DNC Forever** checkbox is not selected.

6. If the upload type is **PEWC**, click one of **Consent** or **Non-Consent** to denote if the contact has to delivered as Consent (user provided consent) or Non-Consent as per the definition of Prior Express Written Consent.

7. If the upload type is **CPT**, select a time zone.

8. Selecta **Day of Week** for the customer-preferred day of the week to receive the call.

9. Select the checkbox for Slot A. Select the Start Time and End Time for the customer-preferred calling time for this slot. Click OK.

10. If you need another slot, select the check box for Slot B. Select the **Start Time** and **End Time** for the customer-preferred calling time for this slot. Click **OK**.

11. If you need a third slot, select the check box for Slot C. Select the **Start Time** and **End Time** for the customer-preferred calling time for this slot. Click **OK**.

12. Click **Upload**.

**Fields**

| Fields | Description |
|---|---|
| Upload Type | This determines the kind of compliance contacts DNC, NDNC, or PEWC - that are being uploaded. |
| | **DNC** - DNC is Do Not Call (registry). Certain telecom regulatory authorities have given the option to phone users to mark themselves as DNC customers. No person or organization shall make an unsolicited call or send an unsolicited SMS to a phone that is listed as DNC. |
| | **NDNC** - NDNC is Do Not Call (registry) at a national level. If a number is registered under NDNC, then no person or any organization in the registered country (where the number is registered) shall make an unsolicited call or send an unsolicited SMS. |
| | **PEWC** - PEWC is Prior Express Written Consent. This compliance mandates that telemarketers obtain the prior express written consent of the called party for auto-dialed or prerecorded telemarketing calls to wireless numbers and prerecorded calls to residential landlines. PEWC is the responsibility of the enterprise setting up outbound campaigns. The enterprise needs to make sure that the numbers being uploaded for a campaign are PEWC complaint. |
| Import Mode | Mode of import |
| | **Append**: This appends the uploaded records to an already existing DNC/NDNC/PEWC list. |
| | **Overwrite**: This clears the existing list and appends new records to the list. |
| | **Delete**: Records in the DNC/NDNC/PEWC list matching those being uploaded are deleted. |
| File Type | Type of file to import. |
| | If you are using the application in a localized language (other than English), save the contact file placed for upload in UTF-8 encoding. |
| Delimiter | Lists character to separate data fields in a file. |
| | Use any one of the following delimiters in your upload file: comma (,), dash (-), dollar ($), percent (%), pipe (|), circumflex or caret (^), ampersand (&), asterisk (*), and |

| | tab. |
|---|---|
| Profile Name | Lists profiles. A Profile is a template that stores the mapping of upload lists and compliance fields that can be reused every time both manual and auto uploading. |
| Country Code | Business field in the upload file to be mapped as country code |
| DNC Data | Field to be mapped as filter for DNC data |
| Area Code | Business field to be mapped as an Area Code.<br><br>The state law compliance for this campaign is as per the area code that is configured in System. The state law of the state belonging to this area code is applied. |
| Channel Type | Mode of communication to apply DNC upload such as Voice, Email, or SMS.<br><br>It is presented as a dropdown list where you can select one of the channel type from the list or check-box which allows you to select multiple channel types. |
| DNC Duration | Duration of contacts to be marked as DNC. |
| DNC Forever | DNC forever allows uploaded contacts to DNC/NDNC/PEWC forever |
| Campaign Specific | List Campaign specific details |
| Category Specific | Lists Categories |
| Campaign | Name of campaign |
| Campaign Groups | Name of Campaign group |

## Global Upload

Global upload lets you upload a single lead list into multiple campaigns based on the criteria defined for each of these campaigns. This section deals with configuring global upload details such as file information and conditions.

User can perform the followings:

- Upload Contacts
- Global Upload Configuration

Global upload helps you to map the contact fields with the data type. You can add additional conditions to the contact list by clicking plus next to the rule (Add Condition) and create additional condition sets. Condition within a condition set are ANDed together when evaluating the rule. Each condition is ORed with any other condition sets.

## Upload Contacts

**Import File**

1. Click + **Add** icon and navigate to **Upload Contact**.

2. Select the **Type** from **Text/CSV** or **Other**. Other format supports only JSON format.

3. Click **Choose File** and select a contact file to upload.

   **Note**: If you are using the application in a localized language other than English, save the contact file placed for upload in UTF-8 encoding.

4. Select a **File Template** from the Global Upload Configurations.

**Data Schema**

1. Navigate to the **Data Schema**. All fields in the template file are displayed in the dropdown. Define the characteristics of the each of the fields.

2. Select a **Data Type** from **Float**, **String**, **Number**, and **DateTime**.

3. If the selected data type is **DateTime**, select a **Format**.

**Expression Builder**

1. Navigate to **Expression Builder** and click **CREATE NEW**.

2. Enter an **Expression Name**.

3. Select a **Function** from the dropdown. For functions Left, Right, Substring, and Replace, all the Schema Fields (header fields in your upload file) and System Fields are populated. Select one of these and click **Select**.

4. Click **Settings** against Parameter 1. There are three parameters that you can choose for this expression. For functions Left, Right, Substring, and Replace, all the Schema Fields and System Fields are populated. Select one of these and click **Select**. For all other date, day- and time-related functions, you can select only **Now**.

5. Click **Settings** against Parameter 2. There are three parameters that you can choose for this expression. For functions Left, Right, Substring, and Replace, all the Schema Fields and System Fields are populated. Select one of these and click **Select**. For all other date, day- and time-related functions, you can select only **Now**.

6. Click **Settings** against Parameter 3. There are three parameters that you can choose for this expression. For functions Left, Right, Substring, and Replace, all the Schema Fields and System Fields are populated. Select one of these and click **Select**. For all other date, day- and time-related functions,

you can select only **Now**.

7. Click **Save**.

**Build Condition**

1. Navigate to the **Build Condition** tab. This displays the build condition for a campaign and Profile. User can edit or delete the condition from the **Action**.

2. Click **+ Add Condition** to create a new condition.

3. Select a **Campaign Name** and a **Profile Name** from the dropdown.

4. There are two ways to upload a file. This is controlled by the configuration *RecordsMovedToAllMatchedConditions* in the *web.config* of the *LCMGlobalUploader* component.

    a. True - To multiple campaigns, where a contact satisfies conditions for multiple campaigns

    b. False - To a single campaign, where the contact is uploaded to the first campaign that matches the condition.

5. To enable or disable an **Advanced Builder**, see Advance Build Condition.

6. Click **Upload**.


## Global Upload Configuration Using Text and CSV

To know how to perform Global Upload Configuration using Text and CSV, see Configuration Using Text and CSV


## Global Upload Configuration Using API.

To know how to perform Global Upload Configuration using API, see "Configuration Using API" on page 108.


## Global Upload Configuration Using JSON or Fixed Width

To know how to perform Global Upload Configuration using Text or JSON Files, see "Configuration Using JSON or Fixed Width" on page 105


## Status Update of Global Upload

1. Select a global list ID and click **Menu** icon under **Action**.

2. Based on current status, menu displays options. Select appropriate option to change status.

**Delete Global Upload**

1. Select a global list ID and click **Menu** icon under **Action**.

2. Select **Delete**.

**Fields**

| Fields | Description |
|---|---|
| Global List ID | List ID allocated by the application at the time of upload. |
| File Name | File name that contained the contacts for upload. |
| Uploaded Time | Date and time when list was uploaded |
| Processed | Count of processed contacts from the list. |
| Unmatched | Count of contacts that were unmatched from the list. Click download to download the list of unmatched records. |
| Error | Count of contacts that display error at the time of upload. Click Download to download the list of error records. |
| Global List Campaign | Expand to view the number of contacts uploaded to each campaign |
| Status | Define the status of contacts. Active - This status indicates list is active, that is contact upload is successful and contacts will be delivered to the dialer. Stopped - This status indicates list is stopped. Contacts are uploaded to the respective campaigns, but are not delivered to the dialer. Failed - All contacts from this list are not uploaded to the campaigns. Completed - Contacts are successfully uploaded to the respective campaigns. |
| Completion Percentage | The Completion Percentage is calculated using the formula: ((TotalRecords - BadRecords - UnmatchedRecords) / TotalRecords)* 100 |
| Action | List down the action to take |
| Stop | Stops contacts uploaded to various campaigns and delivering to the dialer. |
| Start | Resumes uploaded contacts' delivery to the dialer. |

| Fields | Description |
|---|---|
| Permanent Stop | Permanently stops delivery of contacts from this list. This action is irreversible. |

**Configuration Using JSON or Fixed Width**

**Import File**

1. Select a **Source** for the upload.

    a. Select a **New** file to configure a new file for global upload.

    b. Select a **Existing** file to update conditions to an existing file.

2. If the selected **Source** is **New**, select a **Delimiter**

3. Select a **File Type**.

    a. **Text/CSV** - Select this to upload contact from a flat file. The fields in the flat file can be sep-arated by a comma, a tab, or a custom delimiter.

    b. **API** - If not using a flat file, you can also use a template to upload the contacts using the API.

    c. **Others** - If you select Others, select an appropriate format from Fixed Width (formatted text files without headers) or JSON(default option).

    **Note**: If you are using the application in a localized language (other than English), save the contact file placed for upload in UTF-8 encoding.

4. If you are uploading from a file, select an upload file.

    **Note**: Ensure that the file name that you place for upload begins with same string. Example, you receive files from a third-party application (CRM) for upload on a regular basis. If the file you con-figure here is Contact.txt, all files placed by the third-party application should start with this name. The third-party application may append a time stamp or a unique ID for identification - for example, Contact_MMDDYYYY.txt or Contact_000001.txt, respectively. If the application finds a file that matches the starting string (in this case, Contact.....), the file is taken up for upload.

    **Note**: If your contact file contains Optional Business Fields, file headers for these fields should not contain any special characters anywhere. Also ensure that the file header for these fields do not begin with a number.If you use a Custom Delimiter, select a Delimiter that you have used in your upload file to separate data fields.
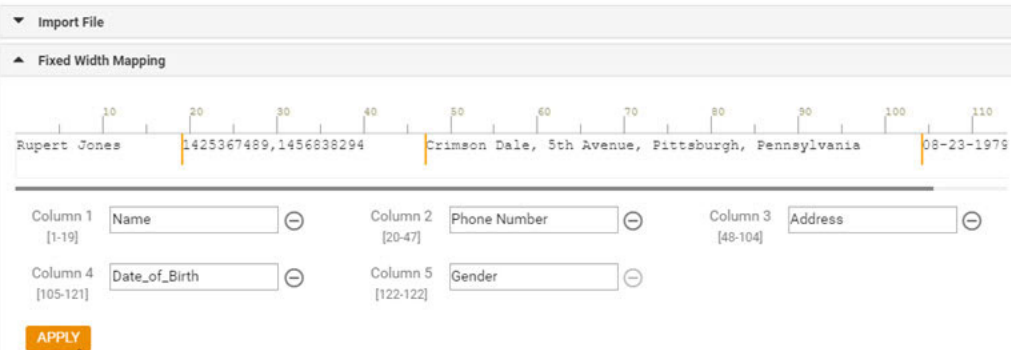
**Fixed Width**

This option is applicable only if selected file format is **Others**.

1. Select the intended TXT file, Fixed Width section appears.



2. The first row of data from the file is displayed on a character scale. It allows to delimit the columns and define the headers for each of them.

3. Click on the places along the data row to mark the limits for each column. A maximum of 128 characters is permissible per column.

4. The first established column is named as Column 1 and the consecutive columns are numbered accordingly. The character range is also specified for each column. The range for the first column starts from 1. The end point of a column is the starting point of the next.

5. Define the header for each column in the text box, present along each of them.

   Note: Only the TXT files without headers are suggested for upload. If a TXT file with a header is uploaded, the header is treated as a record. Any header mismatch is not reported in Global Upload history. They can be availed from the Error Log folder under Global Upload path.

6. To delete a column, click **Remove** along it and confirm on the Delete Confirmation pop-up that appears. Last column cannot be deleted.

7. Click the **APPLY** button to save the changes. Once applied, the changes cannot be reverted. The column headers are now populated for data mapping in the subsequent fields. Navigate to the Field Mapping section to map the headers to the fields.

**Data Schema**

1. Navigate to the **Data Schema**. All fields in the template file are displayed in the dropdown. Define the characteristics of the each of the fields.

2. Select a **Data Type** from **Float**, **String**, **Number**, and **DateTime**.

3. If the selected data type is **DateTime**, select a **Format**.

**Expression Builder**

1. Navigate to **Expression Builder** and click **CREATE NEW**.

2. Enter an **Expression Name**.

3. Select a **Function** from the dropdown. For functions Left, Right, Substring, and Replace, all the Schema Fields (header fields in your upload file) and System Fields are populated. Select one of these and click **Select**.

4. Click **Settings** against Parameter 1. There are three parameters that you can choose for this expression. For functions Left, Right, Substring, and Replace, all the Schema Fields and System Fields are populated. Select one of these and click **Select**. For all other date, day- and time-related functions, you can select only **Now**.

5. Click **Settings** against Parameter 2. There are three parameters that you can choose for this expression. For functions Left, Right, Substring, and Replace, all the Schema Fields and System Fields are populated. Select one of these and click **Select**. For all other date, day- and time-related functions, you can select only **Now**.

6. Click **Settings** against Parameter 3. There are three parameters that you can choose for this expression. For functions Left, Right, Substring, and Replace, all the Schema Fields and System Fields are populated. Select one of these and click **Select**. For all other date, day- and time-related functions, you can select only **Now**.

7. Click **Save**.

**Build Condition**

1. Navigate to the **Build Condition** tab. This displays the build condition for a campaign and Profile. User can edit or delete the condition from the **Action**.

2. Click **+ Add Condition** to create a new condition.

3. Select a **Campaign Name** and a **Profile Name** from the dropdown.

4. There are two ways to upload a file. This is controlled by the configuration *RecordsMovedToAllMatchedConditions* in the *web.config* of the *LCMGlobalUploader* component.

   a. True - To multiple campaigns, where a contact satisfies conditions for multiple campaigns

   b. False - To a single campaign, where the contact is uploaded to the first campaign that matches the condition.

5. To enable or disable an **Advanced Builder**, see Advance Build Condition.

6. Click **Upload**.

Build condition displays the following fields:

| Field Name | Description |
| --- | --- |
| SequenceID | It is the sequence ID for the campaign where the contact process is occurring. |
| Campaign | Name of the campaign. |
| Profile Name | Name of the profile. |
| Condition | Name of the condition. |

| Action | Action to be performed. |
|---|---|

**Configuration Using API**

**Import File**

1. Click + **Add** icon and navigate to **Global Upload Configuration**.

2. Select a **Source** for the upload.

    a. Select a **New** file to configure a new file for global upload.

    b. Select a **Existing** file to update conditions to an existing file.

3. If the selected **Source** is **New**, select a **Delimiter**

4. Select **API** as a **File Type**. If you are using the Global Upload API to upload contacts, select this option. This requires a template (data source) that contains the contact details. You can map the fields in the template file to the data schema, write conditions, and upload contacts.

5. Enter a **Template Name**. A template contains the input requirements as mandated by the API.

**Data Schema**

1. Navigate to the **Data Schema**. All fields in the template file are displayed in the dropdown. Define the characteristics of the each of the fields.

2. Select a **Data Type** from **Float**, **String**, **Number**, and **DateTime**.

3. If the selected data type is **DateTime**, select a **Format**.

**Expression Builder**

1. Navigate to **Expression Builder** and click **CREATE NEW**.

2. Enter an **Expression Name**.

3. Select a **Function** from the dropdown. For functions Left, Right, Substring, and Replace, all the Schema Fields (header fields in your upload file) and System Fields are populated. Select one of these and click **Select**.

4. Click **Settings** against Parameter 1. There are three parameters that you can choose for this expression. For functions Left, Right, Substring, and Replace, all the Schema Fields and System Fields are populated. Select one of these and click **Select**. For all other date, day- and time-related functions, you can select only **Now**.

5. Click **Settings** against Parameter 2. There are three parameters that you can choose for this expression. For functions Left, Right, Substring, and Replace, all the Schema Fields and System Fields are populated. Select one of these and click **Select**. For all other date, day- and time-related functions, you can select only **Now**.

6. Click **Settings** against Parameter 3. There are three parameters that you can choose for this expression. For functions Left, Right, Substring, and Replace, all the Schema Fields and System Fields are populated. Select one of these and click **Select**. For all other date, day- and time-related functions, you can select only **Now**.

7. Click **Save**.

**Build Condition**

1. Navigate to the **Build Condition** tab. This displays the build condition for a campaign and Profile. User can edit or delete the condition from the **Action**.

2. Click **+ Add Condition** to create a new condition.

3. Select a **Campaign Name** and a **Profile Name** from the dropdown.

4. There are two ways to upload a file. This is controlled by the configuration *RecordsMovedToAllMatchedConditions* in the *web.config* of the *LCMGlobalUploader* component.

   a. True - To multiple campaigns, where a contact satisfies conditions for multiple campaigns

   b. False - To a single campaign, where the contact is uploaded to the first campaign that matches the condition.

5. To enable or disable an **Advanced Builder**, see Advance Build Condition.

6. Click **Upload**.

# Business Outcome

Business outcome is the disposition set by an agent based on the result of an interaction with a customer. Business outcome defines the rules for recall and closure for each business outcome.

Example, a credit card holder may confirm that he is paying up the balance. Your description can be Confirmed To Pay. In this case, you can treat this business outcome as Success. You can configure the business outcome to close the contact if it is a success. Conversely, if the credit card holder declines to pay, your description can be Declined To Pay, and you can set the business outcome as Failure. Again, you can configure the business outcome to reschedule the contact again at a later date.

User can create a new business outcome, edit, and delete a business outcome.

## Sync Platform Outcomes

**Note**: **Global_<dialername>_Wrap-up** is applicable for Webex Contact Center.

**Note**: You can synchronize Nice CXone Disposition using the SYNC DISPOSITION button and create new business outcomes. This is applicable for Nice CXone.

Business Outcomes are available to the agent on the Workspace.

When an agent synchronizes the dialer with Campaign Manager application, wrap-up codes are fetched and displayed under **Global_<dialername>_Wrap-up** group. Campaign Manager gives priority to defined Wrap-up code over a business outcome set in the Agent Desktop.

You cannot add a new business outcome or remove a business outcome from the group. You can define the "Parent Outcomes" below and modify the business outcome properties such as **Outcome Type**, **Reschedule Time**, **Max Retry**, **Priority**, **Lead Score** and so on.

### Add a New Business Outcome

#### Business Outcome Group

1. Click **Add** and navigate to the **Add Business Outcome**.
2. Enter the **Business Outcome Group Name** and **Description**.
3. Click **Next**.

#### Parent Outcomes

1. Navigate to the **Parent Outcomes** tab and click **Add**.
2. Enter a **Parent Outcome Name** and a **Parent Outcome Description**.
3. Click **Save** under the **Action** tab.
4. Click **Next**.

#### Outcome

1. Navigate to the **Outcome** tab and click **Add**.
2. Enter an **Outcome** name and select a **Parent Name** from the dropdown.
3. Select the **Outcome Type** such as Failure or Success.
4. Enter the **Reschedule Time**, **Max Retry**, **Priority**, and **Lead Score**.
5. Turn the **Close Contact** to **ON** to close the contact.
6. Turn the **Remove Contact** to **ON** to remove the mode.

7. Click **Save** under the **Action** tab.

8. Click **Save**.

**Edit or Delete Business Outcome**

User can edit and delete a business outcome.

**Edit an Outcome**

1. Select a Business Outcome and click **Edit** under **Action** tab.

2. Update the parameters and click **Update Group**.

**Delete an Outcome**

1. Select a Business Outcome and click **Delete** under **Action** tab.

2. Read the warning and click **Delete** to remove the business outcome

**Fields**

| Field | Description |
|---|---|
| Business Outcome Group Description | Description of a business outcome group |
| Parent Outcome Name | Name of a parent outcome |
| Parent Outcome Description | Description of a parent outcome |
| Action | Defines action to take for an outcome. User can edit or delete an outcome. |
| Outcome | Name of an outcome. An outcome is the disposition set by an agent based on the result of an interaction with a customer. |
| Outcome Type | Defines outcome type such as failure or success |
| Reschedule Time | Defines day and time by which a contact is to be rescheduled for an outcome |
| Max Retry | This is the number of retries allowed when an agent sets a business outcome for a call. After reaching this number, the contact is dialed to the next valid mode. If no other valid modes are available, the application keeps retrying this contact on this mode till the Daily or Global Retries is reached. |
| Priority | Defines the priority order of an outcome. Adjust the number appropriately to deliver this contact on a higher priority. |
| Lead Score | This is not applicable for the current release. |

| Close Contacts | Specify if contact needs to be closed or not. |
|---|---|
| Retain PCB | Option to make a personal callback to the same agent. the currently connected call is a personal callback contact and, after disposition, needs to maintained as a PCB contact, turn the Retain PCB switch ON.<br><br>**Note**: Personal callback feature is not currently available. It is planned for a future release. |

# Area and Zip Code

The Area and ZIP code maintains a master list of ZIP codes and area codes, which are associated to their respective states and time zones. By associating, Campaign Manager ensures adherence to local statutory requirements for contacting individuals at various times of the day, weekends, and other applicable periods.

## Add an Area Code

To add an area code:

1. Navigate to the **Area Code** tab and click **Add Area Code**.
2. Enter the **Area Code** in numeric value and select a **Time Zones** to map the area code.
3. Enter a **City** and a **State** for an area code.
4. Turn the **Block Status** of an area code to **On** or **Off**. This allows to block and unblock an area code.
5. Select the **Start Date/Time** and the **End Date/Time** for an area code to be blocked or unblocked.
6. Click **Save** under the **Action** tab.

## Import a New Area Code

To import the Area code:

1. Click **Import Area Code**.
2. Click **Choose File** and select an area code file.
3. Select the appropriate value from the dropdown for mapping. Map the **Area Code**, **Zone Name**, **City**, and **State**.
4. Click **Import**.

**Import Area Code to Block or Unblock**

The application does not deliver blocked area contacts to the dialer. Use the BLOCK / UNBLOCK feature of the Area Code functionality to block delivery of contacts.

To import the area codes file to block or unblock:

1. Navigate to the **Area Code** > **Block/Unblock**.
2. Select a file type from **Block** or **Unblock**.
3. Click **Choose File** and select an area code file.
4. Select the **Start Date/Time** and **End Date/Time** for an area code to be blocked or unlocked.
5. Select the **Zip Code** from the dropdown for mapping.
6. Click **Import**.

**Add a Zip Code**

To add a zip code:

1. Navigate to the **Zip Code** > **Add Zip Code**.
2. Enter the **Zip Code** and select a **Zone Name** to map the zip code.
3. Enter a **City** and a **State** corresponding to the zip code.
4. Turn **Block Status** of zip code to **On** or **Off**. This allows to block and unblock a zip code.
5. Select the **Start Date/Time** and **End Date/Time** to define a duration of zip code to be blocked or unblocked.
6. Click **Save** under the **Action** tab.

**Import a Zip Code**

To import the **Zip** code:

1. Navigate to the **Zip Code** > **Import Zip Code**.
2. Click **Choose File** and select a zip code file.
3. Select the appropriate values from the dropdown for mapping. Map the **Zip Code**, **Zone Name**, **City**, and **State**.
4. Click **Import**.

**Import Zip Code to Block or Unblock**

To import the Zip codes file to block or unblock:

1. Navigate to the **Zip Code** > **Block/Unblock**.

2. Select the file type from **Block** or **Unblock**.

3. Click **Choose File** and select a zip code file.

4. Select the **Start Date/Time** and **End Date/Time** for zip code to be blocked or unlocked.

5. All the fields in your text file are displayed in the dropdown list in the Field Mapping Section. Select the field in your upload file that corresponds to the Area Code.Select a zip code from the drop-down for mapping.

6. Click **Import**.

**Edit an Area Code or Zip Code**

1. Select an Area Code or Zip Code and click **Edit** under Action.

2. Update the details. Turn the **Block Status** switch **ON** to block the area code or zip code.

3. Click **Save**.

**Fields**

| Fields | Description |
|---|---|
| Zip Code | A postal code consisting of five or nine digits. |
| City | Name of the city |
| State | State name of the state |
| Block Status | Defines if an area or zip code is blocked or unblocked |
| Start Date/Time | Start date and time for an area code or a zip code to be blocked or unblock |
| End Date/Time | End date and time for an area code or a zip code to be blocked or unblock |
| Action | Allows to edit or delete an area code or a zip code |

# State Law

In certain countries, individual states may have distinct telemarketing regulations and calling protocols. The State Law module allows you to specify state-specific callable times and other compliance requirements.

## Add State

User can create states, associate area codes and ZIP codes, and apply time zones.

**To add states:**

1. Click **Add State** and enter the **State** name.

2. Select the **Zone Name** from the dropdown.

3. Click **Save and Continue**.

**Select Zip Code**

1. Navigate to the **Select Zip Code**.

2. Select the **Zip Code** to map with state. Use the search box to find appropriate zip code.

**Select Area Code**

1. Navigate to the **Select Area Code**.

2. Select the **Area Code** to map with state. Use the search box to find appropriate area code.

3. Click **Save**.


## State Law Groups

The State Law Group tab allows to set up groups of states and configure the callable time, as applicable for the given state.

**Note**: A state law group can be mapped to several campaigns at a time.

**Example**: State might have a regulation that telemarketer should call only between 8:00 AM to 6:00 PM on week days and 8:00 AM to 2:00 PM on Saturdays, with no calling on Sundays. You can configure your application to ensure that the contacts are delivered for dialing only within these hours and rest assured that the contact will not be delivered in violation of a state law.

There could also be a combination of laws - not limited to these examples:

State 1 - Calls to a customer not allowed on any mode between 9 pm and 6 am; to a home landline allowed only between 7 am and 9 am, except Sundays; to a mobile allowed only between 10 am and 2 pm Monday to Friday. Restrictions on Voicemail apply as well.

State 2 - Calls to a customer home allowed only from 6 pm to 8 pm except Sundays; office landline allowed only from 10 am to 1 pm Monday to Friday; no calls at all on Sunday; no unsolicited SMS between 6 pm and 6 am.

State Law Groups tab allows you to configure your application to meet the statutory requirements for dialing, sending out SMS/EMail messages or even Voice mails. In addition to the State Law Group, ensure you have

configured the Compliance Conditions Builder (CCB) that applies a specific CCB condition group to specific states. These State Law Groups are mapped to different campaigns to dial contacts accordingly. A Sate Law Group can be mapped to several campaigns at a time.

To add state law groups:

1. Navigate to **State Law Groups** tab and click **Add State Law Group**.

2. Enter the **Group Name** and **Description** of a group. Click **+** icon to add the multiple states.

3. Enable the Default switch to **On** to keep the default settings.

   **Note**: For existing State Law Groups, the Default State is displayed at the end, after all other states.

4. Select the **State Name** and **Zone Name** from the dropdown. You can update the details only if default settings are On.

5. If a user need to add a state, click **Add State** and see "Add State" on the previous page.

6. Enter the **Start Time** and the **Stop Time** within which contacts can be dialed out for the state.

7. If applicable, click **Set WeeksDays Individually** to define a time period specifically for each day of the week.

   **Note**: The time period defined here is applied for all the days in a week, by default.

8. Click **Create**.

**Mode**

**Note**: Contact Cisco CSM to enable this configuration.

1. Enable **All Modes Enabled** switch to activate all modes.

2. If **All Modes** switch is not activated, select a mode from dropdown.

3. Enter **Start date** and **Start Time.**

4. Click **+** icon to add multiple modes.

**Compliance Groups**

**Note**: Contact Cisco CSM to enable this configuration.

1. Navigate to the **Compliance Group** tab.

2. Move an applicable compliance groups to the **Selected Compliance Group**.

**State Law Group Features**

**Note**: Contact Cisco CSM to enable this configuration.

1. Enable the **Customer preferred time** option.

2. Enable the **Accelerated Dialing** option if contact needs to be delivered to the State Group.

**Select Holiday**

1. Navigate to the **Holiday** tab and select the **Holiday** for state.

2. Click **Save**.

## Update State Law

1. Select the state name or state group name and click **Edit**.

2. Update the details and click **Save**.

## Delete State Law

1. Select the state name or state group name and click **Delete**.

2. Click **Ok** on the confirmation pop up.

## Fields

| Field | Description |
|---|---|
| State Name | Name of the state |
| Group Name | Name of the state groups |
| Description | Description of the state group |
| Zone Name | Time zone of the state pr |
| Start and Stop Time | defines the Start Time and the Stop Time, within which contacts can be dialed out for the state. |
| Global Select | Lets you select all the zip codes and area codes at once |
| Zip Code | Zip code of the state |
| Area Code | Area code |
| Action | Allows you to delete or edit a state or state group |
| All Modes Enabled | Enables all the modes at once |
| Customer Preferred Time | Enables times that is given by customer |
| Select Holiday | Allows you to select the holidays applicable for the state |

# Holiday

Holidays defines list of holidays based on various geographies on account of festivals, observances, birth anniversaries, and so on, and mapped with campaigns. These are days that the campaigns do not normally run. You can add holidays that are available across the entire application. Once added, you can map these holidays to various campaigns as required by the local geography.

**Add New Holiday**

1. Click **Add Holiday** and enter a **Holiday Title**.

2. Enter the **Start Date** and the **End Date** for the holiday.

3. Click **Save**.

4. Select a **Holiday** and click **Add Holiday to Campaign**.

5. Select the appropriate campaigns on the pop up to map. To select all campaigns, select the checkbox in the grid header line.

6. Click **Save**.

**Holiday Mapping**

Holiday Mapping feature helps you to identify the holiday and campaign mapping. Select created holiday and click **Add Holiday Group**. The pop up shows the mapped Campaign, the Group to which the campaign is associated, the Start Date, and End Date for the campaign. This information is available for every holiday created in the application.

**Note**: Add Holiday Group and Import Holiday are not enabled in this release.

**Fields**

| Field | Description |
|---|---|
| Holiday Title | A title for holiday. |
| Start Date | Start date of holiday |
| End Date | End date of holiday. |

# URL

URL allows to embed any custom page or a website into the Campaign Manager application so as to launch the same from within Campaign Manager. This eliminates the need of browsing a frequently seen web page by opening another browser tab.

User can add, edit, enable, disable or delete a URL. Enabling to System Menu displays a shortcut to the URL on the System menu. This helps to access the URL in a single click without having to navigate to this screen.

### Add Url

To add a new URL:

1. Click **Add URL** and enter a web page **Name**.
2. Enter the **URL Address** and the **Description** of URL.
3. Click **URL Logo** of Url logo and select an image.
4. Click **Save**. The URL is added in the list.
5. If needed, enable the **Enable to Menu** to On to display a shortcut to this URL on the System menu. This helps you access the URL in a single click without having to navigate to this screen.

### Update Url

1. Select the url to update and click **Edit**.
2. Update the details and click **Save**.

### Delete Url

1. Select the url to update and click **Delete**.
2. Click **Ok** on the confirmation pop up.

### Fields

| Field | Description |
| --- | --- |
| Name | Name of the url |
| Description | Description of url |
| URL | A Uniform Resource Locator (URL) of the application to configure |
| Enable in Menu | Display a shortcut to this URL on the System menu. |

| | This helps you access the URL in a single click without having to navigate to this screen. |
|---|---|
| Action | Allows you to delete or edit a url |

# Profile

Profiles are used to upload contacts, scrub contacts, or upload Compliance such as DNC, NDNC, PEWC , or CPT contacts. The various activities associated with such uploads, setting parameters, mapping various fields, and so on are handled at the profile level and are not required to be repeated at the time of upload.

**Create Profile**

To add a profile:

1. Click + **Add** to create a new profile.

2. Select the **Profile Type** from the dropdown. Select one of the following:

   a. Select **Upload Contacts** to upload contacts to deliver to the dialer.

   b. Select **Scrub Contacts** to clear contacts in the database before a fresh upload.

   c. Select **Compliance** to upload DNC/NDNC/PEWC/CPT contacts.

      Note: Contact Cisco CSM to enable PEWC and CPT configurations.

   d. Select **AreaCode** to upload area codes.

   e. Select **ZipCode** to upload zip codes.

3. Enter a **Profile Name** and select a **Campaign ID** to map with profile.

   **Note**: Campaign ID is applicable for upload contacts and scrub contacts profile type.

4. Enter a **Profile Path**. If you are placing contacts from Amazon S3, see Placing contact in Amazon S3.

5. Click **Continue**.

**Import Profile**

1. Select the **Source Type** from Formatted File, Database Table, Database View, or Salesforce CRM.

2. If the source type is Formatted File[1],

---

[1]The contacts are available in a formatted file with various fields separated by a separator like pipe (|), tilde (~), and so on, or a comma-separated file. These files can be either placed on the local disk, a shared path, or on Amazon S3, Simple Storage Service.

a. Select file type from **Text/CSV** or **Others**. For more information, see "Formatted File Inform-
ation " on page 126.

b. Select a **Delimiter**.

c. Click **Choose File to Import**.

d. If a file type is **Others**, select an appropriate format - Fixed Width (formatted text files
without headers) or JSON(default option).

   **Note**: If the application is in a localized language other than English, save the contact file
   placed for upload in UTF-8 encoding.

3. If the source type is **Database Table** or **Database View**:

   **Note**: You must not use Campaign Manager database details for uploading contacts through the
   database.

   a. Enter the **Server Name**, **Database Name**, **User Name**, **Password**, and **View Name**.

   b. Click **Connect**.

   c. Currently the application supports uploads only from an SQL database. Uploading contacts
   through database table or view can be scheduled only once in a day at the time configured
   in the field Profile Execution Time.

4. If the source type is **Salesforce CRM**,

   a. Enter a **SF Campaign Name**. All the campaigns created by the logged-in user on the Sales-
   force CRM are populated here. Select one from the dropdown list. If the logged-in user is an
   administrator, all the campaigns created on the Salesforce CRM are populated.

   b. Enter a **SF Member Status**. The contacts (members) on the Salesforce CRM are associated
   with various statuses like Sent, Uploaded, Responded, Error, and so on. These statuses are
   shown here as check-boxes. Select the member statuses that you want imported to the cam-
   paign. You are allowed to select multiple member statuses.

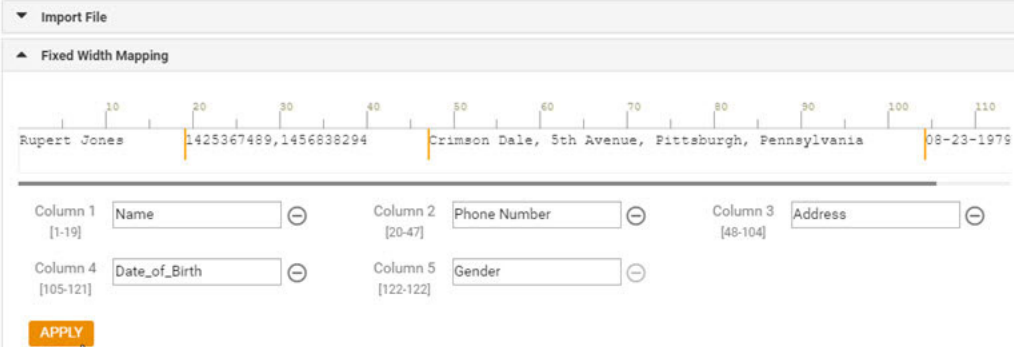   c. Select a **Delimiter** from the dropdown.

**Fixed Width**

This option is applicable only if selected file format is **Others**.

1. Select the intended TXT file, Fixed Width section appears.

2. The first row of data from the file is displayed on a character scale. It allows to delimit the columns and define the headers for each of them.

3. Click on the places along the data row to mark the limits for each column. A maximum of 128 characters is permissible per column.

4. The first established column is named as Column 1 and the consecutive columns are numbered accordingly. The character range is also specified for each column. The range for the first column starts from 1. The end point of a column is the starting point of the next.

5. Define the header for each column in the text box, present along each of them.

   Note: Only the TXT files without headers are suggested for upload. If a TXT file with a header is uploaded, the header is treated as a record. Any header mismatch is not reported in Global Upload history. They can be availed from the Error Log folder under Global Upload path.

6. To delete a column, click **Remove** along it and confirm on the Delete Confirmation pop-up that appears. Last column cannot be deleted.

7. Click the **APPLY** button to save the changes. Once applied, the changes cannot be reverted. The column headers are now populated for data mapping in the subsequent fields. Navigate to the Field Mapping section to map the headers to the fields.

**Field Mapping**

1. Select the **Priority** for the contact.

2. Select an **ZoneName** from the dropdown. Map the time zone for the contacts to perform dialing based on the customer time zone. The available options are Timezone (user-defined), Campaign-specific Time Zone, Zip Code-specific Time Zone, and Area-specific Time Zone, State-specific Time Zone, and Area-Zip Code Specific Time Zone.

3.  Enable the **Area Code** and enter its **start** and **length**. Select a Start from the number panel. This is the first character from where the area code starts. Select a length from the number panel. This is the number of characters in your area code from the Start.

4.  Enable the **Zip Code** and enter its **start** and **length**. Select a Start from the number panel. This is the first character from where the zip code starts. Select a length from the number panel. This is the number of characters in your zip code from the Start.

    **Note**: Select a Start from the number panel. This is the first character from where the zip code starts. For example, if your zip code data contains 10 digits and the zip code commences in the second digit, select 1 from the number panel.

5.  Select the **State Name** from the dropdown.

6.  Select the appropriate value for **Contact Moment**, **Moment DateTime Format**, **Lead Score**, **Agent ID**, **Additional Zip code**, and **Device ID** from the dropdown.

    **Note**
    - It is not mandatory to enter an additional zip code. Where an additional zip code has not been entered, the primary zip code applies.
    - When an invalid zip code is entered for a contact, the application picks up the default zip code value from the Contact Uploader component's web.config file, if enabled. If a default zip code is not enabled, the - contact is not dialed out.
    - When an invalid zip code is entered for a mode, the specific mode is rendered invalid and is not dialed out.


**Mode Mapping**

It displays all the modes configured for the campaign .

1.  Select the appropriate value from **Field** dropdown for each mode.

2.  Select an applicable **Zip Code** for the mode from the uploaded list. Complete mapping for all displayed modes. This mapping is used to determine the contact Time Zone for dialing.


**Business Field**

1.  **Business Field** displays fields defined for the campaign. The fields forming part of the contact upload file are displayed in the Value dropdown list. Map each business field to a value in the contact field.

    **Note**: If profile is created for uploading contacts from a Salesforce CRM campaign, the CRM business fields are listed for mapping

2.  **Optional Business Field** list down all the fields forming part of contact file. Select check box for the fields that needs to be treated as optional business fields for this campaign.

    **Note**: The optional business fields mapped here appear as screen pop data on the Agent Desktop.

**Configuration**

1. Select the **Upload Level** from **Campaign** and **List**.

2. Define **Time to Live** for the list. Time to Live is the validity period for this list of uploaded contacts to be eligible for dialing.

3. Select a **Start Date** for Time to Live. The Time to Live is calculated by the number of days given in the corresponding field in the mapped campaign.

4. Select the **Operation** type from **Overwrite** or **Append/Update**.

5. Enable the **Append** or **Duplicate Filter** or **Update** option based on the action to be performed.

**DNC/ NDNC**

1. Enable the **NDNC Filter** checkbox to ensure that the contacts marked as National Do Not Call are not uploaded.

2. Enable the **DNC Filter** checkbox to ensure that the contacts marked as Do Not Call are not uploaded.

3. Select a **Type** of the field on which DNC filter needs to be applied.

**Schedule**

**Note**: This section applicable only If the profile contacts are uploaded from Salesforce CRM.

1. Select the days of the week on which Salesforce CRM contacts are uploaded to Campaign Manager. User can select a day, multiple days, or All Days.

2. Use the number panel to select the **Interval (Min)** for the application to look for **Salesforce CRM** contact file.

3. Select the **Time Slot** button to specify the time. Application search for the **Salesforce CRM** contact file at the specified time. Enter or select a maximum of three time slots.

4. Click **SAVE PROFILE**.

## Placing Contact Files in Amazon S3

1. Profile Path field fetches the Amazon S3 Bucket folder path from the *LCMConsole component's web.config* app settings. Contacts are picked from the file placed in this location.

2. You can configure your Amazon S3 Bucket folder path in the app settings section of the *LCMConsole component's web.config* file as follows:

```
<add key="S3BucketFolderNamePath" value="<Path>"/>
```

3. The application needs authenticated access to the contact files in S3. To provide this access, navigate to the *<Application Install Folder>\Application\LCMContactsUploader* folder and open the configuration file with a suitable editor. Search for the following property:

```
<FileLibrary StorageType="AmazonS3" ClearExternalFiles="false">
<AmazonS3FileSettings>
<add key="AwsAccessKeyId" value=""/>
<add key="AwsSecretKeyId" value=""/>
<add key="AmazonRegionEndPoint" value=""/>
</AmazonS3FileSettings>
```

4. Enter the values for AwsAccessKeyId, AwsSecretKeyId, and AmazonRegionEndPoint properties. Save the changes and exit.

5. Navigate to *<Application Install Folder>\Application\LCMService* and enter values for the same properties in the configuration file for Campaign ManagerService. Save the changes and exit.

6. The application is now ready to upload contacts from files placed in Amazon S3.

## Update a Profile

1. Select a profile, click **Profile Action** icon.

2. Click **Edit** to update profile parameter.

3. Click **Save Profile**.

## Activate a Profile

1. Select a profile, click **Profile Action** icon.

2. Click **Start** to activate a profile and select **Stop** to deactivate a profile.

## Copy and Create a new profile

1. Select a profile, click **Profile Action** icon.

2. Click **Copy** and enter a **Profile Name**.

3. Update the **Campaign Id** and click **Continue**.

4. Update the applicable parameters and click **Save Profile**.

**Delete a Profile**

1.  Select a profile, click **Profile Action** icon.

2.  Click **Delete** to remove a profile.

3.  Click **Ok** on the confirmation pop up.

**Formatted File Information**

Ensure that the application has authorized access to the folder local or network where you place the files for upload. It is recommended that the Profile/Auto Upload file name must be *FILENAME.PROFILENAME.txt* or *PROFILENAME.TXT*.

Example, if external resources place the file *Data.profile1.txt"* into *"C:\ComplianceProfilePath* directory, then it validates the file name to finding out the related profile. (removes the extension of the file; splits with dot value and gets rightmost item). Since this file name available as a profile1, it chooses the Profile1 template and processes the records. If your contact file contains Optional Business Fields, file headers for these fields should not contain any special characters anywhere. Also ensure that the file header for these fields do not begin with a number.

The following fields are reserved fields and should not be used as headers in the file containing contacts for upload:

*   AVAILABLEMODE
*   BUSINESSFLDS
*   FTimeZone
*   FPriority
*   FValidModes
*   FContactID
*   FCallStartDate
*   FCallStartTime
*   FCallEndDate
*   FCallEndTime
*   FZipCode
*   FEmailCC
*   FEmailBCC
*   FEmailSubject
*   FEmailMessage
*   FEmailAttachment

- FSMSText
- FState
- FAreaCode
- FLineOrRowNumber
- FAgentId
- BussFld1 to BussFld26 (26 reserved fields)
- Mode1……anynumber
- Mode(anynumber)_Zipcode

**Fields**

| Field | Description |
|-------|-------------|
| Upload Type | Type of upload to be performed. |
| Upload Contacts | Allows to upload contacts to deliver to the dialer. |
| Scrub Contacts | Allows to clear contacts in the application database before a fresh upload. |
| Compliance | Allows to upload DNC/NDNC/PEWC contacts. |
| AreaCode | Allows to upload area code. |
| ZipCode | Allows to upload zip codes. |
| Profile Name | Name of the profile . |
| Campaign ID | Displays list of campaign IDs. |
| Profile path | Path of profile. |
| Formatted File | The contacts are available in a formatted file with various fields separated by a separator like pipe (\|), tilde (~), etc., or a comma-separated file. These files can be either placed on the local disk, a shared path, or on Amazon S3, Simple Storage Service. |
| Data base | The contacts are available in a database table or View and can be uploaded directly to the campaign from the database. Currently the application supports uploads only from an SQL database. Uploading contacts through database table or view can be scheduled only once in a day at the time configured in the field Profile Execution Time. |

| | |
|---|---|
| Salesforce CRM | Contacts available on a Salesforce campaign are downloaded into application campaigns. These contacts are dialed out and outcomes received from the Cisco CCE dialer are updated back to the Salesforce CRM application. |
| SF Campaign Name | All the campaigns created by the logged-in user on the Salesforce CRM are populated here. Select one from the dropdown list. If the logged-in user is an administrator, all the campaigns created on the Salesforce CRM are populated. |
| SF Member Status | Contacts (members) on the Salesforce CRM are associated with various statuses like Sent, Uploaded, Responded, Error, etc. These statuses are shown here as checkboxes. Select the member statuses that you want imported to the Campaign Manager campaign. You are allowed to select multiple member statuses. |
| Delimiter | List of character that separates various fields in contact upload file |
| Server Name | Name of database server name |
| Priority | The priority you want to set for this contact. The higher the priority, the earlier the contact is delivered to the dialer. If you do not select a priority, by default all the contacts are treated with the same priority. After the dial out, the priority of these contacts change based on the contact strategy. |
| Zone Name | Map the time zone for the contacts; dialing is based on the customer time zone. Select from Timezone (user-defined), Campaign-specific Time Zone, Zip Code-specific Time Zone, and Area-specific Time Zone, State-specific Time Zone, and Area-Zip Code Specific Time Zone. |
| Timezone | This is a user-defined field in the contact list upload file. The name of the field is dependent on the header as set by the user in the contact upload file. The contacts are dialed out based on this time zone. |
| Campaign Specific Time Zone | The contacts are dialed out in the time zone that the campaign operates in. |
| Zip Code Specific Time Zone | The contacts are dialed out based on the time zone that the contact zip code and additional zip |

| | code (if provided) intersection is located in. For this, the application also checks for any Additional Zip Code specified. |
|---|---|
| Area Specific Time Zone | Area Specific Time Zone - The contacts are dialed out based on the time zone that the contact area and mode-level zip code (if provided) intersection is located in. For this, the application also checks the zip code configured in the Mode Mapping section. |
| State Specific Time Zone | The contacts are dialed out based on the time zone that the contact's geographical state. |
| Area-Zip Code Specific Time Zone | The contacts are dialed out based on the time zone that the combination of contact area and the zip code location. |
| Area Delimiter | The delimiter used to separate components of a contact telephone number. This is enabled only if your Zone Name is Area-specific Time Zone. |
| State Name | The geographical state to which these contacts belong. |
| Area Code | The area code applicable to the contacts.<br><br>Select a Start from the number panel. This is the first character from where the area code starts. For example, if your phone number contains 12 digits, and the area code commences in the first digit, select 1 from the number panel.<br><br>Select a Length from the number panel. This is the number of characters in your area code from the Start. For example, if your phone number contains 12 digits, and the area code is three digits long from the first digit, select 3 from the number panel. |
| Zip Code | The zip code applicable to the contacts. |
| Additional Zipcode | The additional zip code applicable to the contacts.<br><br>Note:A configuration file setting controls permission to the Additional Zip Code feature. |
| Additional Zip Code | The application offers the capability to map a contact with multiple zip codes and identify a callable window which intersects with all the time zones associated with these zip codes. The system allows a maximum of two zip codes associated at |

| | a record level and one zip code at each contact phone number level, uploaded for calling. The system dials these numbers at a mutually interceding time interval across all the mapped zip codes at a record level and phone number that is being called. |
|---|---|
| Contact Moment | specific date and time to dial out a contact. |
| Moment Date Format | The date format for the Contact Moment. Available options for the date format are dd-MM-yy, dd/MM/yy, MM-dd-yy, MM/dd/yy, yy-MM-dd, yy/MM/dd, dd-MM-yyyy, dd/MM/yyyy, MM-dd-yyyy, MM/dd/yyyy, yyyy-MM-dd, and yyyy/MM/dd. |
| Agent ID | The agent ID for the contact. |
| Lead Score | Helps in identifying the most prospective customer to be reached out from a campaign. This score is available as part of contact selection strategy and can be set at the time of upload or wrap up, while defining the business / telephony outcome. |
| Device ID | The unique ID of the device, to which the identity authentication notifications are sent. A Device ID can be a mobile number, application ID, or a mobile equipment identity. |
| Subject | The subject line of the Email message. |
| Body | The Email message body. |
| Attachment | The path to the attachment file that goes with the Email. Ensure the contact upload file contains a field showing path of attachment file is located in the path mapped. |
| SMS Fields | Map a field from the Message dropdown list. |
| Time to Live | Time to Live is the validity period for this list of uploaded contacts to be eligible for dialing, subject to various other configurations on the Campaign Manager Console. From the calendar, select a Start Date for Time to Live. The Time to Live is calculated by the number of days given in the corresponding field in the mapped campaign. |
| Overwrite | At Campaign level, all existing contacts across lists are closed and uploads are treated as fresh contacts. At List level, all existing contacts pertaining |

| | to this list are closed and uploads are treated as fresh contacts for this list. |
|---|---|
| Append | If upload level is Campaign, a new list is created. If upload level is List, contacts are appended to the existing contacts in the list. The Duplicate Filter checkbox is activated for selection. The Duplicate Filter searches the file and uploads unique con-tacts, leaving out duplicates, filtered on the basis of business fields. |
| Update | If upload level is Campaign, updates the business fields for the filtered contacts. |
| NDNC Filter | Ensures that the contacts marked as National Do Not Call are not uploaded. |
| DNC Filter | Ensures that the contacts marked as Do Not Call are not uploaded. |
| Type | field on which NDNC or DNC filters are applied. |
| Interval (Min) | specify time an application to search for Sales-force CRM contact file |
| Time Slot | Specify the time at which the Campaign Manager application has to look for the Salesforce CRM con-tact file. |

# Reassign Agents

**Note**: The Re-assign Agents feature is not supported in the current release.

This allows users to reassign an agent who is currently mapped to a contact.

**Filter**

To create a filter:

1. Select an **Agent ID** to assign a call. You can select multiple agent IDs.
2. Select the **Call Start Date** and the **Call End Date**.
3. If required, select a **Fresh Contact** check box to include fresh contacts in result.
4. Select the **Campaign** from the dropdown. You can add multiple campaigns.
5. If required, user can set the **Build Condition** switch to **On**. See **Build Condition**.

6. Click **Show Contacts** to populate the contacts based on the set conditions. The following parameters are displayed:

| Fields | Description |
|---|---|
| Select | A check box to select a specific contact. |
| Campaign ID | The campaign ID assigned to the contact. |
| Contact ID | The contact ID assigned to the contact. |
| CallType | The call type for the call such as Normal or Callback. |
| CallBackStartDate | The date and time to make the callback call. |
| ValidModes | The modes that are valid for this callback call. |
| ListID | The list ID from which this contact has been uploaded. |
| Status | The contact status indicating Open, Rescheduled, and so on. |
| Campaign ID | The campaign to which this contact is uploaded. |
| Agent ID | The Agent ID assigned this contact. |
| PreviousAgent | The previous agent assigned to this contact. |

7. User can view contacts based on filter, **Select All** and **Global Select**. Select All is used for selecting all the contacts on the current page and Global Select is used for selecting all populated contacts across all pages. To reassign agent:

8. Click **Action** to reassign selected contacts to other agents.

9. Enter an **Agent ID**. Click **Update Time** if new agent needs to handle the call at a different time. Update the **Start Time** and the **End Time**.

10. Click **Reassign Agent**.

**Fields**

| Fields | Description |
|---|---|
| Fresh Contact | Include fresh contacts |
| Campaign ID | Campaign ID assigned to the contact |
| Contact ID | Contact ID assigned to the contact |
| CallType | Call type for the call - Normal or Callback |
| CallBackStartDate | Date and time to make the callback call |
| ValidModes | Modes that are valid for this callback call |

| | |
|---|---|
| ListID | List ID from which this contact has been uploaded |
| Status | Contact status such as open, rescheduled, and so on |
| Agent ID | Agent ID assigned to the contact |
| PreviousAgent | Previous agent assigned to the contact |
| BusinessField | Lists down available business fields |
| OptionalBusinessField | Lists down available optional business fields |
| Action | Provides option to reassign an agent |

## Other Settings

You can perform the following:

### Attempt Counter

Attempt Counter allows you to assign outcome types to each pre-configured telephony outcome. you can identify if an outcome is Right Party contact (RPC) or not. You can keep a count of every retry made for contacts being dialed out from the application.

Navigate to the **Other Settings** > **Attempt Counter**. Select an outcome group, update the required fields, enable or disable the required fields, and click **SAVE**. The page displays the following parameters:

| Field | Description |
|---|---|
| Outcomes | Lists all the telephony outcomes |
| Type | Outcome Type for each outcome such as Telephony Outcome |
| RPC Type | Allows you to set the outcome type as RPC Type or Non-RPC Type. You cannot add any new Telephony Outcome. You can only change the assigned outcome type from RPC to Non-RPC or vice versa. |
| | Right Party Contact (RPC) is the telephony or business outcome when you can confirm that the person you intended to contact has responded to your voice call. |
| | Non Right Party Contact (Non -RPC) is the telephony outcome when your voice call is not answered by the intended person. For example, an answering machine, |

| | fax machine, no reply, and so on |
|---|---|
| Global Retry | The maximum number of retries that can be made for dialing each contact in a campaign. The contacts are not dialed once the global retries are exhausted. |
| Daily Retry | This is the maximum number of retries that can be made for dialing each contact in a day for a campaign. |
| Mode Retry | This is the maximum number of retries that can be made, before moving to the next mode. However, if the outcome retry limit is reached earlier, the dialing is performed to the next available mode. If a second mode is not available, the only available mode is dialed out till the Daily and/or Global retry limit is reached. |
| Outcome Retry | This is the maximum number of retries that can be made, before moving to the next mode. However, if the mode retry limit is reached earlier, the dialing is performed to the next available mode. If a second mode is not available, the only available mode is dialed out till the Daily and/or Global retry limit is reached. |
| Window Retry | This is the maximum number of retries that can be made in a calling window. |
| Live Call Outcome | Select the checkbox for the application to consider this outcome as a live call outcome (as customer-answered call). Live call outcome is used to calculate the Abandoned Percentage. |

### Dimension

Dimension enables building of customized reports. Campaign Manager provides a wide range of real-time and historical reports. Campaigns have business parameters, some mandatory and some optional, configured according to certain campaign-specific requirements.

Example, Sales Channel may be the second business parameter in one campaign and fifth in another. At the campaign level, reporting based on business parameters is possible. However, at the enterprise level, should you require information of sales across various channels and across various campaigns, Dimension is the way to go. You can map similar business parameters across campaigns, no matter where they are configured, under one dimension.

1. Navigate to the **Dimension** tab and click **CREATE DIMENSION**.

2. Add a **Dimension Name** and a **Description**.

3. Enter a **Dimension Value** such as Credit Card, Debit Card, Charge Card, or Loyalty Card for a Business Field Card Type. If you want a customized report grouping enterprise-level data on credit card, you can enter Credit Card in this field.

4. To add more values, click **Add** and add the **Dimension Value**.

5. Click **Save**.

**Delete Dimension**

To delete existing values, use the **Delete** button.


## Alerter

Campaign Manager is made of various components and services. All of these have to work in tandem for the application to function smoothly and seamlessly.

Alerter is a self-detecting facility on the application that scans all the services and components for proper working. If some service is down, the alerter sends out an alert by Email to a designated Email ID that is configured here. You can configure the Email alert for the recipients here. This helps the dialer administrator take corrective steps.

1. Navigate to the **Alerter** tab.

2. Enter a **Sender Email** address. This is displayed in the From field when the alerter sends out a mail only when:

    a. Any component is stopped or started working

    b. Any alert raised by the SNMP Receiver. See Email Settings.

    c. A scheduled report is sent to the configured recipient.

3. Enter an **SMTP** server address that the Email is sent from and an **SMTP Port** that is reserved for the SMTP server.

4. Enter a **User Name** for the SMTP server and a **Password** for the SMTP server.

5. Enter a **Recipient Email ID**. The alert Email is sent to this Email.

6. To add more recipients, click **Add** and add **Email ID**s.

7. Click **Save**.

**Delete a recipient**

To delete recipient, use the **Delete** button. Click **Save**.


**Fields**

| Field | Description |
|---|---|
| Unique Identifier | Name of the Unique Identifier. Helps in providing a unique identification |

| | to the identical business fields across multiple campaigns. |
|---|---|
| Common Field | Identical business field name |
| Data Type | Data type for business parameter such as<br><br>• Number, for numeric data.<br><br>• Float, for numbers with decimal values.<br><br>• DateTime, for values that represent date and time. If you select this data type, select a desired date format in the Format field.<br><br>• String, for alphanumeric data that includes any character. |
| Dimension Name | Name of the dimension. Dimension helps you in creating a customize report. |
| Description | Description of the dimension |
| Dimension Value | defines a value for which you want a customized report grouping enter-prise-level data, such as credit card, debit card |
| Sender Email | Email Id from which alerter sends out a mail |
| SMTP | Server name that the Email is sent from |
| SMYP Port | Port that is reserved for the SMTP server |
| User Name | User Name for the SMTP server that Campaign Manager uses to send Emails |
| Password | Password for authenticating a user |
| Recipient Email ID | Alert Email is sent to this Email |

# Global Business Parameters

These are the Business Fields used in Campaigns. Additionally, you can create unique and common fields for global use across campaigns or for use in the Compliance Conditions Builder (CCB). The total number of business fields allowed in a campaign is 30, including 5 unique and common fields, in addition to the 25 business fields allowed at the campaign level.

- Unique ID - You can use these fields to create business fields like Customer ID, Account ID, and so on.

- Common Field - You can use these fields to create business fields like amounts, number of days, and so on.

Example, Customer ID can be a business field across campaigns for which grouping is necessary in reports. Customer ID can be the first business field in Campaign A, sixth in Campaign B, and tenth in Campaign C. If you create this business field as a Unique Identifier field, it is possible to group data from these fields.

To create a business parameter:

1. Enable a **Unique Identifier 1** and click **Ok** on the confirmation pop up.

   **Note**: When you save and enable this Unique Identifier 1, all Unique IDs configured for various campaigns are overwritten with this value.
   You have to enable the files sequentially. You cannot enable Unique Identifier 2 before enabling Unique Identifier 1. Same rule applies for Common Fields also.

2. Enter a **Unique Identifier 1**.

3. Perform step 1 to step 2 for **Unique Identifier 2** and **Unique Identifier 3**.

4. Enable the **Common Field 1** and enter the field name.

5. Select the **Data Type** from **String**, **Number**, and **Float**.

6. Perform step 4 to step 5 for **Common Field 2**.

7. Click **Save**.

   **Note**: When you enable and save the Global Business Parameters, you cannot make any changes or delete any of these parameters. This action is irreversible.


**Business Fields**

1. Navigate to **Business Fields** and click **+ADD**.

2. Enter the **Business Filed Name** and the **Data Type**.

   **Points to Note**:
   a. Do not begin business field name with a special character or number. You can use the special character or number in between a business field name.

3. Click **Save**.

4. Click **Edit** under **Actions** tab to update the details and click **Save**.


**Fields**

| Field | Description |
|---|---|
| Unique Identifier | Name of the Unique Identifier. Helps in providing a unique identification to the identical business fields across multiple campaigns. |
| Common Field | Identical business field name |
| Data Type | Data type for business parameter such as |

| | |
|---|---|
| | • Number, for numeric data.<br><br>• Float, for numbers with decimal values.<br><br>• DateTime, for values that represent date and time. If you select this data type, select a desired date format in the Format field.<br><br>• String, for alphanumeric data that includes any character. |
| Business Field Name | Name of the business field. |

# High Availability Status

It provides a view of the high availability status of your tenant.



The HA Status shows the status of a server on which the core is running and alerts you to troubleshoot the other server which is down. Status of both Primary and Secondary servers are presented as:

• UP - Server is up and running. It is presented in green color.

• STANDBY - Server is in standby mode and presented in yellow color.

• DOWN - Server is down and presented in red color.

# Identity Authentication

**Note**: Contact Cisco CSM to enable this configuration.

Identity Authentication helps to ensure that the enterprise has communicated with the right person.

Example:
If an enterprise, such as a bank, requires the customers to authenticate for a process, Campaign Manager sends a pre-call authentication to the contacts, requesting the customers to schedule a time for a call. If the customer has responded within the threshold time, the customer is called/ not called based on their

response. In case of no response from the customer, the application dials out the contact, post the threshold time. After successful pre-call authentication, the agent requests the customer to carry out the identity authentication during the call using the Identity Authentication widget.

User can create a new, update or delete a Identity Authentication name.

## Create Identity Authentication

To add identity authentication:

1. Click + **Create Identity Authentication**.

2. Enter the **Name** and the **Description** of the Identity Authentication template.

3. Select the appropriate fields from the **Available Identity Authentication Fields** and move to **Selected Identity Authentication Fields** box.

4. Click **Next**.

### Notification Message

1. Select the **Pre-Call Notification** to predefined wait-time or select the **Enter Manual** option to set one.

2. Enter a **Pre-Call Notification Message** that is delivered as a pre call notification.

3. Select the **Receive a call right away**, **Schedule a call back**, and **Decline a call**. These options are given to the customer to select for an identity authentication call. Select at least one of the options other than **Decline a call**. If **Decline a call** is selected, select one of the other two options.

4. Enter a **On-Call Notification Message** that is delivered to the customer during the authentication call.

5. Use the slide bar or manually enter the number of **Retries for rescheduling** an identity authentication call.

6. Click **SAVE**.

## Update Identity Authentication

1. Select an Identity authentication name and click **Edit** under the **Action** tab.

2. Update the appropriate details and click **SAVE**.

**Delete Identity Authentication**

1. Select an Identity Authentication name and click **Delete** under action.

2. Click **Ok** on the confirmation pop up.

**Fields**

| Fields | Description |
|---|---|
| Name | Name of the Identity Authentication template |
| Description | Description respective of the intended Identity Authentication template |
| Pre-Call Notification | Predefined wait-time |
| Pre-Call Notification Message | A message that is delivered as a pre-call notification |
| Action on Notification | Provides an option to customer to choose for an identity authentication call such as Receive a call right away, Schedule a call back, and Decline a call |
| On-Call Notification Message | A message to be delivered to the customer during the authentication call |
| Retries for Reschedule | Allows to enter the number of retries for rescheduling an identity authentication call.<br><br>Access the + and - buttons to vary the number. This feature permits the customer to reschedule the call by choosing a later period, as configured in the Identity Authentication template. By doing so, a new pre-call notification is sent to the customer at the chosen time. The customer can now, fix a time for the call or reschedule it, again. This process of rescheduling can be done as many number of times as mentioned in the Retries for Reschedule field. Exceeding this limit, the Identity Authentication process is canceled. |
| Action | Allows to edit and delete an Identity |

| | Authentication |
|---|---|

## Export or Import Campaign

It allows you to export and import the configuration of a campaign. This process includes only the Campaign page, System Configuration page, and the Contacts Strategy page for any given campaign.

Compliance profiles cannot be imported or exported. Users can import and export all modes and contact strategies. The selected time zones in the campaigns are automatically enabled in the importing environment.

### Points to Consider

Make a note of the following information while importing / exporting campaigns:

- The Compliance profiles can neither be imported nor exported.
- The following modules, if mapped to the campaigns being imported, are also imported: Business Outcome, Holidays, Profile, Email, SMS, and Identity Authentication.
- All modes and contact strategies can be imported and exported.
- The selected time zones in the campaigns get enabled automatically in the importing environment, if not enabled before.

### Import a campaign

1. Select the **Import** radio button and click **Choose File**.
2. Select the appropriate file to import and click **Import**.

### Export a campaign

1. Select the **Export** radio button.
2. Select the appropriate campaign to export and click **Export**.

### Fields

Import and export includes the following fields:

| Fields | Description |
|---|---|

| Campaign | Campaign name. |
|---|---|
| Campaign Group | Campaign group name. |
| Status | Status of imported contact if import is completed or pending. |
| Reason | Reason if any imported contact is failed. |
| **Export** | |
| Campaign | Campaign name. |
| Campaign Group | Campaign group name. |

The Campaign and System Configuration include the following tabs for import and export:

| **Campaign** |
|---|
| Campaign Details |
| Business Parameters |
| AI Configuration |
| CSS |
| Schedule |
| Email Template Editor |
| SMS Template Editor |
| Other Configuration |
| **System Configuration** |
| Modes |
| Business Outcome |
| Holidays |
| Profile |
| Email |
| SMS |
| Identity Authentication |

## Campaign Category

Categories assist in grouping campaigns with a common purpose. Campaign categories can be used to apply conditions such as DNC, NDNC, and so on.

## Create Campaign Category

To create a campaign:

1. Navigate to **Campaign Category** and click + **Add Campaign Category**.

2. Enter a **Campaign Category Name** and a **Description** of the campaign category.

3. Enter the **Unsubscribe GroupID** if user uses send grid server for sending and receiving Emails. If the unsubscribe ID is not provided, the system assigns '0' (zero) as the value for the field.

4. Click **Save**.

## Update a Campaign Category

1. Select a campaign category and click **Edit** under the **Action** tab.

2. Update the parameters and click **Save**.

## Delete a Campaign Category

1. Select a campaign category and click **Delete** under the **Action** tab.

2. Click **Ok** on confirmation pop up.

   **Note**: Campaign Category cannot be deleted for as long as it is mapped with at least one campaign.

## Fields

Fields used in campaign category are listed here:

| Fields | Description |
|---|---|
| Campaign Category Name | Name of a Campaign Category. A campaign category is a group of campaigns. |
| Campaign Category Description | Description of campaign category |
| Action | Allows user to edit and delete campaign category |
| UnSubscribe GroupID | In case of using a SendGrid server for sending and receiving Emails, enter the corresponding Unsubscribe ID, as created in SendGrid. If the Unsubscribe ID is not provided, the system assigns '0' (zero) as the value for the field. |

# CPaaS Provider Configuration

**Note**: Currently, this feature is not supported in Webex Contact Center.

Campaign Manager supports running IVR (agent-less) campaigns using external CPaaS service providers. User can configure the access credentials of the service provider.

### Configure Twilio Flex

To configure a new CPaaS provide as Twilio Flex:

1. Click **Add CPaaS**.

2. Enter a **Provide Name** and select a **Provider Vendor** from dropdown as **Twilio**.

3. Enter the **Application Name**. This is the Twilio Flex application name that the application uses to make calls.

4. Enter a **Application Secret Key** provided by the CPaaS provider to access the CPaaS API. Private key is generated when user creates an application on Twilio Flex.

5. Enter an **Application Token** for authenticating a user.

6. Click **Save**.

   **Note**: This configured URL is populated in the IVR Template Editor for your IVR campaigns.

### Configure Nexmo

To configure a new CPaas Provide as Nexmo:

1. Click **Add CPaaS**.

2. Enter a **Provide Name** and select a **Provider Vendor** from dropdown as **Nexmo**.

3. Enter the **Application ID**.

4. Click **PrivateKey** and select a private key.

5. Enter the **API Key** to access the Nexmo API.

6. Enter a **Secret Key** provided to access the Nexmo API. Private key is generated when you create an application on Nexmo.

7. Select a **Nexmo** number to set as **Outbound Caller ID** for outbound calls from voice campaigns.

8. Click **Get Nexmo Numbers**. User can use these numbers to set as Caller ID for voice campaigns.

9. Click **Save**.

   **Note**: This configured URL is populated in the IVR Template Editor for your IVR campaigns.

## Update CPaaS Configuration

1. Select the CPaaS name and click **Edit**.

2. Update the appropriate parameters and click **Save**.

## Delete CPaaS Configuration

1. Select the CPaaS name and click **Delete**.

2. Click **Ok** on the confirm pop-up.

## Fields

| Field | Description |
|---|---|
| Name | Name of the CPaaS service provider configured to use the application to handle IVR campaigns |
| Platform Vendor | Vendor of the CPaaS service provider |
| Application | Name of the CPaaS provider that Campaign Manager uses to handle IVR campaigns |
| Actions | Allows to edit and delete a CPaaS configuration |
| Application Name | Twilio application name is used to make calls. To generate Application Name, login into your Twilio Flex account and create an application. On successful creation, the Application Name is available. |
| Application Secret key | Secret Key provided by the CPaaS provider to access the CPaaS API. Private key is generated when you create an application on Twilio Flex. Download the Private Key and store it in the local server. This Private key is used for authorizing Twilio Flex calls. |
| Application Token | Application Token for authenticating the user. You can generate a token for a specific application name and secret key combination from the Twilio Flex application. Enter this token key here. |
| Application ID | Nexmo application ID used to make calls. To generate Application ID, login into your Nexmo account and create an Application. On successful creation, |

| Field | Description |
|---|---|
| | the Application ID is available. |
| Private Key | Allows to select the private key of the application |
| API Key | API Key to access the API |
| Secret key | Key provided to access the API. Private key is generated when user creates an application. Download the Private Key and store it in the local server. This Private key is used for authorizing calls. |
| Get Nexmo Numbers | Allows to use the numbers to set as Caller ID for voice campaigns |
| Outbound Caller ID | Number to set as outbound caller ID for outbound calls from voice campaigns |

# API Keys

The API Keys feature facilitates secure access for a third-party application to Campaign Manager services. Basic Authentication allows access to the Webservice and Websocket Server.

### Create API Keys

1. Navigate to **API Key** and click **Create**.

2. Enter a **Name** and a **Description** for the API Key.

3. The **API Key** is generated and populated in the **API Key** field. Copy the key to a file.

4. The **Secret Key** is generated and populated in the **Secret Key**field. Copy the key to a file.

    **Note**: Secret Key is visible to the users only when you are creating the API keys. Once you have saved the API key and secret key pair, the key value is not visible.

5. Click **Submit** to complete.

### Using API Key

You can use the created API Key as credentials to access the Webservice and Websocket.

**Webservice**

Send the API Key as a header via the Basic Authentication protocol with Base64 encryption. Encrypt the API Key.

```
Authorization:Basic (Base64 encryption) (apikey:secretkey)
```

Example:

```
Authorization: Basic MTIzNDUtMTIxMjEyLTEyMTIxMi0xMjEyOjEyMzQ1LTEyMTIxLTIxMjEyLTEyMTItMTIy
```

When the client is successfully connected, the client receives the responses.

**Websocket Connectivity**

Access the Websocket with authentication:

```
wss://<user>:base64(apikey:secretkey)@<Websocket URL>:PortNumber/AEDataTransmitter?name=<user>
```

Example:

```
wss://A-
gent1:MTIzNDUtMTIxMjEyLTEyMTIxMi0xMjEyOjEyMzQ1LTEyMTIxLTIxMjEyLTEyMTItMTIy@dev.aecde-
vops.com:4747/AEDataTransmitter?name=Agent1

where:
ApiKey – Generated API Key
SecretKey – Generated secret key.
Encode the API Key - SecretKey pair using a Base64 encode utility and use the encoded result
in the request.
Websocket URL – This is the Websocket URL and the Port, varies for each user.
User – The name of the client requesting access to the Websocket server.
```

When the client is successfully connected, the client receives the responses.

## Delete API Key

1. Select an API Key and click **Delete**.

2. Click **Ok** on the confirmation pop up.

**Fields**

| Field | Description |
|---|---|
| Name | Name assigned to the API Key |
| API Key | API Key as generated by the application |
| Created Date | Date and time on which the API Key was generated |
| Delete | Allows to remove API key |
| Secret key | Displays the secret Key. User must copy the key. |
| Websocket URL | This is the Websocket URL and the Port, varies for each user. |
| User | The name of the client requesting access to the Websocket server. |

# Compliance Conditions Builder

**Note**: Contact Cisco CSM to enable this configuration.

The Compliance Conditions Builder (CCB) feature allows the creation of multiple compliance groups, organized based on geographical states or state groups. These compliance rules can be applied within state law groups, which are mapped to individual campaigns. Your organization can create as many groups of statutory compliance as required. The compliance conditions take effect when contacts are delivered for dialing.

**CCB Usage**

CCB allows you to perform the following actions:

- Control when a rule is to be executed for channels and modes.
- Apply rules across rolling days or hours.
- Create rules for number of attempts (for example, three attempts across two days, five attempts across five days, etc.)
- Create rules for first or last attempt specifically, by checking outcome or attempt time.
- Check for various type of attempts configured.
- Use the three Unique IDs and phone number to track attempts.
- Use two system-level business fields in your dialing rules.
- Check for Consent or Non-consent.

- Configure type of interaction - Voice, Voicemail, Email, etc. Within Voicemail, you can configure No Message, Limited, or Non-limited).

  - A Limited Voicemail is one where the caller leaves just identifying the caller and not any other information like the purpose of call, etc.

  - A Non-limited Voicemail is one where the caller can leave additional information as well.

- Use operators like +, >, <, so on.

- Control the rescheduling logic automatically, manually, or even close the contact.

## CCB Groups

Navigate to the CCB > Compliance Conditions Builder.

Left pane displays all the configured CCB groups and right pane shows the conditions. You can copy the condition and replicate in another CCB group and delete the CCB group.

Right pane shows the conditions configured for the specific CCB. You can expand to see the conditions stipulated for this rule. You can also use the Add Rule button to add a rule. The Actions button palette has buttons that you can use to Edit, Copy, or Delete a rule configured for this CCB group item.

## Adding a CCB Group

To add a CCB group:

1. Click **Add New**.
2. Enter a **Compliance Name**.
3. Select the **Compliance Group Type** from the **State** or **Campaign** options.
4. Enter the **Rule Name**.
5. Select the **Channels** on which this rule is executed. All the channels configured for this application instance is listed for selection. You can select one, many, or all channels.
6. Select the **Modes** on which this rule is executed. All the modes configured for this application instance is listed for selection. You can select one, many, or all modes.
7. Enter a number for **Rolling** and select **Days** or **Hours** from the next dropdown list. This indicates that the rule restricts the number of attempts every rolling days/hours. For example, if you configure 7 as the rolling days, the application restricts dialing to the number of attempts over 7 rolling days. This sets the rule for calling. The next steps determine the conditions that are applied while calling.
8. Select the **State Law Group** if you select **State** as **Compliance Group Type**. Select the **Campaign Group** from **Campaign** and **Category** if you select **Campaign** as **Compliance Group Type**.

9. Select a **Unique ID** from the dropdown list. All the Unique IDs created are listed here. See Global Business Parameters for details on how to create a Unique ID.

10. Select a **Valid Mode** from the dropdown list. All the modes created for the chosen channel are listed. You can select one, many, or all modes.

11. Select a **Check Type** from the dropdown list. The options are Attempts, First Attempt, or Last Attempt.

12. If the selected check type is **Attempts**, perform the following:

    a. Select a Compliance Outcome Group from the **Check For** dropdown list. This list contains all the Compliance Outcome Groups created for CCB.

    b. Select an **Operator** from the following: is exactly equal to, is less than or equal to, is greater than, is greater than or equal to, or is not equal to.

    c. Enter a **Value** that the application must check for.

13. If the selected check type is **First Attempts** or **Last Attempts**, perform the following:

    a. Select **Time** or **Outcome** from the **Check For** dropdown list. This list contains all the Compliance Outcome Groups created for CCB.

    b. Select an **Operator** from the following: is exactly equal to, is less than or equal to, is greater than, is greater than or equal to, or is not equal to.

    c. Enter a **Time** or select a **CCB Outcome Group** in the **Value** field.

14. If the above condition is not satisfied, select an option from the Select Action dropdown list. The following actions are listed:

    a. Close Contact - Closes the contact. No further dialing attempts are made.

    b. Reschedule - The application reschedules the contact. Complete the fields for Days, Hours, and Minutes to reschedule the contact.

    c. Auto Reschedule - The application automatically reschedules to dial out as per the automatically, if there are attempts remaining and at the time permitted as per law. The auto reschedule overrides the Contact Strategy, and looks for the earliest available calling time.

15. Click **SAVE**. These rules are now applied at the time of dialing.

**Add More Condition**

1. You can also add more conditions based on various other geographic statutory regulations. For example, some state would have stipulated time-based calling conditions - N number of attempts if the outstanding amount is due for more than X days or unlimited number of attempts if the outstanding amount is due in less than X days.

2. Click **Add** on the condition builder. This opens a dropdown list showing options Attempts, Fields, and Consent.

3. The **AND** operator automatically gets activated.

4. If the selected check type is Attempts, perform the step 10 to step 13.

5. If you select the **Consent**, perform the following:

   a. Select a **Unique ID** from the dropdown list. Options include CustomerID, OrderID, DeliveryID, and ModeValue. This is used to filter the consent based on either the mode value or the selected unique ID.

   b. Select a **Consent or Non-Consent** from the dropdown list. This determines whether the rule is to be applied to a PEWC contact or a non-PEWC contact.

   c. The **Operator** is pre-selected as **is exactly equal to**.

   d. Enter a **Value** for the field. Select from **Yes** or **No**.

6. Perform the step 12 to step 13.

**Adding a Compliance Outcome Group**

Navigate to the **CCB** > **Compliance Outcome Groups** tab to add Outcome Groups for the Compliance Condition builder.

1. Click **Add New**.

2. In the **Available Outcomes** section, all the **Telephony** and **Business Outcomes** are listed by channel.

3. For **Telephony Outcomes**, expand each mode to list the outcomes under the mode.

4. For **Business Outcomes**, expand the Outcome Groups to see the list of outcomes.

5. Select one, many, or all outcomes from the left pane and use the **>** or **>>** buttons to move those to the Selected Outcomes section.

6. Click **Save** to complete.

7. To deselect any outcome, open the group in Edit mode and use the **<** or **<<** buttons to move one, many, or all outcomes out of the group.

**Adding a Compliance Settings**

Navigate to the **CCB** > **Compliance Settings** tab to configure compliance settings for Callback and AEM calls.

1. In the **Compliance Settings** section, you can perform the following:

2. Turn the **Log Callback Calls** switch **ON** to consider both NCB and PCB calls as compliance attempts when contacts are delivered for dialing.

3. Turn the **Log AEM Calls** switch **ON** to consider AEM calls as compliance attempts when contacts are delivered for dialing.

# PII Protection

Personal Identity Information (PII) protection allows you to protect the customer specific information. You can hide the customer specific information such as Name, Address , Email , Telephone number and so on.

You can hide values of the following fields:

- Unique Identifier - List all the Unique Identifier.
- Business Field - Lists all the Global Business parameters.
- Modes - List all the defined modes.

## Unique Identifier

Perform the following steps:

1. Navigate to **Unique Identifier**.

2. Select the appropriate fields and enable **Mask View** to hide the field value. If you enable **Mask View**, **Mask Export** is automatically enabled. **Mask Export** hides the value when you export a report.

3. If **Mask View** is not enabled, you cannot enable **Mask Export**.

## Business Fields

Perform the following steps:

1. Navigate to **Business Fields** to view Global Business Parameters.

2. Select the appropriate fields and enable **Mask View** to hide the field value. If you enable **Mask View**, **Mask Export** is automatically enabled. **Mask Export** hides the value when you export a report.

3. If **Mask View** is not enabled, you cannot enable **Mask Export**.

## Modes

Perform the following steps:

1. Navigate to **Modes** to view modes.

2. Select the appropriate fields and enable **Mask View** to hide the mode value. If you enable **Mask View**, **Mask Export** is automatically enabled. **Mask Export** hides the value when you export a report.

3. If **Mask View** is not enabled, you cannot enable **Mask Export**.

# Webex Contact Center Dialer

Use the Dialer Configuration option to configure your Webex Contact Center Dialer to work with Campaign Manager.

1. Navigate to the **Dialer Configuration** page and click the **Add** button.

2. Enter a **Dialer Name** for this dialer.

3. Enter a **Description** for the dialer.

4. Enter the **Organization ID**. This is a unique ID generated by Cisco for your Webex Contact Center dialer.

5. Enter an **Admin URL**. This is the base URL for the administration APIs, given by Cisco. This helps users synchronize their Teams, Agents, and other entities with the Campaign Manager application.

6. Enter a **Dialer URL**. This is the base URL of the dialer APIs, given by Cisco to start or stop Progressive campaigns.

7. Enter a **DAL URL**. This is the base URL of the Data Layer APIs, given by Cisco, to get the contacts dispositions.

8. Click **Save**. Navigate to the Dialer Listing page – the dialer is now listed. Click Edit from the Actions panel.

9. All the **Telephony Outcomes** and mapped to the Dialer Outcomes created on Webex Contact Center are listed. If you want to map Business Outcomes (created on Webex Contact Center, specific to a tenant) to these Dialer Outcomes, click the Edit button for the specific outcome. Select a Business Outcome.

10. Navigate to the Schedule tab to set up Auto Sync for the dialer. The information on the dialer such as Global Business Fields is synchronized automatically to the Campaign Manager application based on the settings.

11. To synchronize the information, turn on the Auto Sync switch.

12. Select a Frequency from the following:

    a. Schedule – Select a Trigger Time (this is in UTC) to synchronize the dialer with the Campaign Manager application, daily at the scheduled time.

    b. Interval – Select this to configure a synchronization interval, in minutes. You can select an interval (between 15 minutes and 480 minutes). The synchronization happens at scheduled intervals. For example, if you set the interval as 60 minutes, the synchronization happens once every hour.

13. Click **Save**.

# Contact Strategy

Contact strategy refers to the approach to effectively engage with customers through multiple channels or multiple numbers. It involves creating a framework to use in a campaign for the sequence of numbers or channels, determining the retries allowed, adjusting the callable time for each number and channel, and defining the rescheduling strategy for each outcome of an attempt.

Click **Contact Strategy** from the left navigation menu to open the Contact Strategy page.

In the grid, the available contact strategies are listed with its respective details.

| Fields | Description |
|---|---|
| Name | Name of the contact strategy. |
| Strategy Type | Type of the contact strategy.<br><br>• Simple<br>• Advanced<br>• Advanced (Overridden) |
| Description | Description of the contact strategy. |
| Modes | Modes of the contact strategy. Click here for detailed information to add more number of modes if required. |
| Actions | Actions to be taken. To know more, click here. |

## ADD MODES

In the grid displaying the contact strategies, click the **Modes** dropdown list to see all the modes mapped to this contact strategy.

1. In the expanded **Contact Strategy Modes** pop up, you can do the following actions.

2. Click **ADD MODES** and configure contact strategy. Follow the instructions given in the **Modes**.

3. Use the **ON/OFF** switch button to activate/ deactivate the modes successfully.

    **Note**: This facility is available only for **Simple Strategy** and not for **Advanced** .

4. Click the **Edit** button to modify the contact strategy page.

5. On clicking the **Copy** button, the available unused modes are shown - Voice modes for voice campaigns, SMS modes for SMS campaign, Email modes for Email Campaign, and Custom modes for custom campaigns. You can add the required mode from the dropdown list and click **Save**.

6. Click **Delete** to delete the required mode.

**Actions**

The **Contact Strategy Actions** column displays two buttons:

a. **Copy** - Use this button to copy the entire contact strategy, including the mapped modes and the telephony outcomes configured.

b. **Delete** - Use this button to delete a contact strategy.

**Note**: If you have mapped any modes associated to this contact strategy or mapped this contact strategy to any campaign, you cannot delete this contact strategy.

## Contact Strategy - Types

Application supports three types of contact strategy:

**Simple Strategy**: A simple strategy is easily configurable. This strategy allows you to configure modes to be tried one at a time in a sequential order based on the weightage. The cycle is repeated till the configured number of cycles is completed.

**Advanced Strategy**: An advanced strategy allows you to define complex retry rules.

**Callback Strategy**:  Callback Strategy is not applicable for the current release.

## Contact Strategy Creation

Follow the steps listed below to create a Contact Strategy.

### Add Contact Strategy

1. Click **Add Contact Strategy** and the **Contact Strategy Name** tab appears.

### Widget 1 - Contact Strategy Name

2. Enter a **Name** and a **Description** of the contact strategy.

3. Select a Contact Strategy Type from **Simple**, **Advanced**, or **Callback**.

4. Turn the **Restrict Multiple Email and SMS** switch **ON** if you want to control sending of multiple Emails and text messages to the same contact.

   **Note**: Turning this switch ON means the application sends only one Email or SMS to a contact for a specific campaign.

5. Click **Next** to navigate to the **Select Mode** widget.

**Widget 2 - Select Mode**

1. Select a **Mode** from the dropdown list.

   **Note**: If you do not have a mode that applies to this contact strategy, create a new Mode by clicking the Add button.

2. Use the pop-up time panel to select a **Time Range** for this contact strategy to be operational.

3. Use the slider to configure the **Mode Retries** for this contact strategy.

4. Turn the **PEWC** switch **ON** to enable PEWC for this contact strategy.

   PEWC or Prior Express Written Consent is a compliance mandating telemarketers to obtain the prior express written consent of the called party for autodialed or prerecorded telemarketing calls to wireless numbers and prerecorded calls to residential landline.

   **Note**: To deliver the contacts, you need to turn the PEWC switch ON for the ADM campaign.

5. If you enable **Advanced** contact strategy type under **Contact Strategy Name**, the **Transition Retry** switch appears. Turn the switch **ON** to enable the following transition fields for this contact strategy.

   a. Use the **Transition Attempts** slider to fix the number of transition attempts for this contact strategy.

   b. Use the **Transition Duration(Days)** slider to set the number of transition days for this contact strategy.

6. For **Retain Mode Retries while switches to Callback** switch, you can follow the below steps.

   a. In the **ON** position, the remaining retries for this mode is retained when the contact switches to a Callback Strategy.

   b. In the **OFF** position, the retries count is initialized to zero when the contact switches to a Callback Strategy.

7. Click **Previous** to navigate to the previous screen at any time.

8. Click **Next** to navigate to the **Telephony Outcomes** widget.

**Widget 3 - Telephony Outcomes**

The **Telephony Outcomes** widget contains the Outcomes list. Here, you can configure the contact strategy for each outcome listed in the grid.

1. Use the **Search box** to search any specific outcome.

2. Click **Outcomes** in the header row to sort the outcomes in an ascending or a descending order.

3. Click the required row to make the required changes and modify the details. All rows are loaded with default values

4. From the number panel, select the **Reschedule Time (D:H:M)** for the call to be rescheduled for this outcome.

5. From the number panel, select the **Max Retry** for this outcome.

   **Note**: This is applicable only for **Advanced** contact strategies.

6. From the number panel, select a **Priority** for this outcome. The application delivers contacts to the dialer based on high priority.

7. Select a **Branch Mode** an alternate mode to reach the contact.

   **Note**: This is applicable only for **Advanced** contact strategies.

8. Select the **Retain PCB** checkbox if the same agent services the customer in a callback.

   **Note**: This is not applicable for the current release.

9. Select the **Close Contact** checkbox if you want to close the contact based on this outcome.

10. Select the **Remove Mode** checkbox if you want to remove the mode for a combination of contact strategy and outcome.

11. Click **PREVIOUS** to navigate to the previous screen at any time.

12. Click **SAVE AND ADD ANOTHER MODE** to save the contact strategy.

13. Click **SAVE** to complete configuring the contact strategy.

# Mode Management

Mode indicates the different channels of communication that can be used to initiate a conversation. Common modes used in conversational engagement include text-based chat and voice-based interactions via customer number, email, etc.

You can manage the modes mapped to a contact strategy by disabling selected modes, changing the retries allowed for a mode, or changing the callable time for a mode.

### Simple Contact Strategy

The mapped modes are displayed as shown below.

From the **Modes** screen above, you can do the following:

1. Drag and drop the modes to change the priority.

   a. **Enable / Disable** modes - Contacts are not delivered to the disabled modes. If the rescheduler has to reschedule a contact to a mode that is disabled, the contact is rescheduled to the next active mode as per higher priority.

b. This switch ON / switch OFF of modes is subject to the following conditions:

- When a mode is switched OFF, it is deactivated. The phone numbers are not removed. When the mode is switched back ON, contacts are dialed to this phone number.

- All compliance-related validations are applied at the time of contact upload. The mode state - ON or OFF - is not considered.

- If this is the last mode, the cycle is treated as complete. The application continues dialing the next cycle.

2. **Copy / Delete** modes.

3. Click the **Edit** button against the mode you want to edit. The application takes you to the Widget 2 - Select Mode wizard. You can perform the following actions:

   a. Change the callable window for the mode-

   - For a simple strategy, changing this for one mode replicates the same times for the other modes.

   b. Increase / decrease the mode retries - any change in one mode is replicated across the all modes configured for the contact strategy. This also affects how the cycle retries is handled.

   - For example, there are three modes (A, B, and C) in a Simple contact strategy, and the retry count is 1. The number of cycles configured is 2. The application dials out ALL the modes once to complete the first cycle. Then the second cycle dialing commences. Under the enhanced strategy, assume the user has increased the mode retry to 2 - this means ALL the modes can be dialed twice. As per priority, A is dialed twice, B twice, and C twice to complete one cycle. If two cycles are configured, each mode is dialed FOUR times as per priority - twice in each cycle.

4. Click **Save** to complete.


## Advanced Contact Strategy

The mapped modes is displayed as shown below:

From the **Modes** screen above, you can:

1. Drag and drop the modes to change the priority.

2. **Enable / Disable** modes - Enabling or disabling a mode amounts to overriding the configured contact strategy for specific modes. Contacts are not delivered to the modes that are not overridden (that is, disabled). The contacts are delivered only to the modes that are active, that is, overridden. If the rescheduler has to reschedule a contact to a mode that is not overridden, that is, inactive, the contact is dialed out from the highest overridden mode as per the priority.

3. **Copy / Delete** modes.

4. Click the **Edit** button against the mode you want to edit. The application takes you to the **Widget 2 - Select Mode** wizard. You can perform the following actions:

   a. Change the callable window for the mode.

   b. **Increase / decrease** the mode retries

   c. Click **Save** to complete.

# License

Campaign Manager offers a subscription model for licenses. The license fee is billed based on the maximum number of users, contact attempts, or minutes consumed while logged in for the billing cycle. A subscription license does not have a limit on the quantity bought, and overage is charged accordingly. The billing occurs at a pre-agreed frequency.

The license must be renewed upon expiry on the date mentioned in the license file. If the license is not renewed upon expiry, an administrator cannot log in. However, the application continues to work for 12 hours, processing and delivering contacts. After 12 hours, it stops delivering contacts to the dialer.

**View License Reports**

1. Click **License** to view the **Concurrent Login Report** opens.

2. Enter the **Start Date** and **End Date** to display the report for a defined period of time.

3. Click **Show**. The report contains a grid showing the number of Used licenses for **Admin Ports**, **Supervisor Ports**, and **Agent Ports**.

4. Click **Export** to download the report.

**License Upload**

**Note**: Upload is not applicable for all the variants.

User can upload the license and view the details of the same. Navigate to **License** > **Upload**. Browse the file and click **Open**.

The following fields are displayed:

| Fields | Description |
|---|---|
| Licensed Details | Displays the user details:<br><br>• Admin - Number of permitted logged-in users with the Admin role permitted under the terms of this license.<br><br>• Supervisor - Number of permitted logged-in users with the Supervisor role per- |

| | mitted under the terms of this license. |
|---|---|
| | • Agent - Number of permitted logged-in users with the Agent role permitted under the terms of this license. |
| License Usage | Displays license usage details for the current day: |
| | • Admin - Number of permitted Admin users logged in for the current day. |
| | • Supervisor - Number of permitted Supervisors logged in for the current day. |
| | • Agent - Number of permitted Agents logged in for the current day. |
| License Features | List of the application features that are available on this license. |

**License Violation**

Application displays a static alert if:

- Configured days before expiry of the license, a countdown to the license expiry date and time.
- A countdown to the cease date.

**Agent License Calculation**

The following example describes how agent license calculation is performed:

Campaign A is mapped to one or more Campaign Manager campaigns. We have ten 10 Agents mapped to this campaign A. The License Manager service polls the agent count info from AWS end at 15-minute intervals to update License usage. The highest number of agents logged in at any point during the day is used for reckoning the numbers of licenses used.

If 7 agents are logged in between 08.00 am and 12.00 noon, 9 agents are logged in between 12.00 noon and 03.00 pm, and 5 agents are logged in between 3.00 pm and 5.00 pm - the number of agents for the day is reckoned as 9. Except Agent Logout state, the other agent states are accounted while polling the agent count information to Campaign Manager. This information is also available in the License Reports.

# Usage Report

Navigate to **License** > **Usage**. Usage Report displays three types of quantified report on the usage of AEC:

**Concurrent Agent report**

The billing is based on the highest number of logins on any given day in a calendar month.

Example, three agents (A1, A2, and A3) log in on day one, three agents (A1, A4, and A5) log in on day two, and three agents (A6, A7, and A8) log in on day three. The customer is billed based on the highest number of logins in this case and that is three as different agents have logged in, the highest number of agents remains three.

**Agent Usage Report**

The report shows the unique agent logins, at one line for each month.

**Named Agent report**

This report also shows the unique agent logins, but daily.

Example, three agents (A1, A2, and A3) log in on day one, three agents (A1, A4, and A5) log in on day two, and three agents (A6, A7, and A8) log in on day three. The customer is billed based on the unique agent logins and in this case, it is eight.

**Note**: The usage report shows details based on the configurations settings performed during the provision process and contractual terms.
Contact our provisioning team for additional details.
The billing for SaaS model is performed based on the billing type such as Concurrent Agent, Named Agent, or Agent Usage and Minimum Commit signed during the contractual process.

## View Usage Report

Set the time filter to view the report:

1. Enter the specific **Year** to view the data for a different year. By default, the report displays the data of the current year. The report for each month is displayed in an individual tab. The first tab displays the data for the current month while the data for the previous months are available in the subsequent tabs.

2. Select the **Custom Date Range**.

3. Click the **Start Date** to select a Start Date and Time.

4. Click the **End Date** to select an End Date and Time.

   **Note**: By default, the Start Date and the End Date fields display the current date and the time when the Usage Report page is last opened.

5. Click **Show** to fetch the report.

6. Click **Refresh** to refresh the data to the current.

7. Click **Export** to download the report. Select the type of report (Summary and Agent) to be downloaded in the popup that appears.

   a. Summary (default selection) - This report type features the same columns of data as represented in the application. Besides each duration column, the exported file features an extra column that displays the corresponding duration converted to seconds.

   b. Agent - This report type features only the billing dates, agent names, logins, and the duration of the calls handled by the agents, correspondingly.

   c. Select the required months, in case of selecting the Year option in the filter.

8. Click **Export**.

**Reports Fields**

| Field | Description |
|---|---|
| Date | Dates for which the usage data is populated. |
| License Type | License type consumed for the given month. This can be either 'Basic' or 'Premium'. A Basic license holder is otherwise considered Premium when enabled with at least one of the AI features, such as P2P and BTTC. |
| Total Concurrent Agents/ Total Agent Platform Usage/ Total Named Agents | This header represents the total Concurrent agents (in case of Concurrent Agent report)/ total number of agent platforms used (in case of Agent Usage report)/ total number of named agents logged in (in case of Named Agent report) for the given date. |
| Number of Unique Login | The total unique logins for the given date. For Concurrent Agent report, it displays the unique logins for each data row in the given period. For Named Agent and Agent Usage reports, it displays the cumulative sum for each data row. |
| Total Calls Handled | The total count of calls handled by the agents for the given date. |
| Actual Call Duration | The total actual duration of all the calls handled by the agents for the given date. It is the duration consumed from the start to the end of a call. |
| Computed Call Duration | The total computed duration of all the calls handled by the agents for the given date. It is the sum of the rounded off value of each call duration. The rounding off value for the call duration is configured in the back-end for seconds and minutes. |
| Total Active Duration | The total active duration of all the logged in agents for the given date. It is the duration for which the given agent remains in an active state such as Ready, In Call, and so on. |
| Total Login Duration | The total login duration of all the logged in agents for the given date. |
| Total Supervisor Logins | The total number of supervisors logged into the console for the given date. |
| Digital Transactions | This header shows the records for all the corresponding Digital transactions. |
| SMS | Displays the count of campaign SMS sent for the given date. |
| Email | Displays the count of campaign Emails sent for the given date. |
| Total Consumed Units | The total number of digital transaction units conducted for the given date. The value of a unit is configured in the back-end. Example, one unit can be configured as 100 digital transactions. |
| Identity Verifications | This header displays the total number of identity verification transactions conducted for the given date. |
| Total Primary Auth | The total number of pre-call authentication requests sent for the given date. |
| Verified Primary Auth | The total number of successful pre-call authentications for the given date. |
| Total Secondary Auth | The total number of on-call authentications conducted for the given date. |
| Concurrent Agent | The day on which the maximum number of agent logins is shown in the Total |

| | |
|---|---|
| | column for the month. |
| Agent Usage | Total number of unique agents logged in during the month., in one line for the month. By default, report is populated from January to December, each in one line (if custom date is not chosen). |
| Named Agent | Total number of unique agents logged in during the month, on a daily basis. |

# User

User management is essential to authorize access for different users, such as administrators, operators, and other Contact Center users

The roles assigned to users, such as administrators and supervisors, define their actions within the application. In certain situations, a supervisor can play the role of a Dialer Manager. Within the Campaign Manager, you have the capability to create users, assign roles, and map their responsibilities accordingly.

## User Creation

When the provisioning team creates tenant, an super user is created by default. For creating additional users, the tenant can use super user to log into Campaign Manager.

Create following types of users for additional user creation.

**Users** - The users you create here can access the application using SQL authentication or Windows authentication.

**Domain Users** - The users you create here are also created on a specified domain. The passwords set here for these users can also be used to access the domain.

**SSO Users** – Single Sign-On (SSO) users are configured for SSO on a third-party SSO identity provider. This method enables SSO users to log into multiple websites with one set of credentials.

Click **User** from the left navigation page menu to open the User page.

## Fields

| Fields | Description |
|---|---|
| User ID | Displays an User ID of the user |
| User Name | Displays a name of the user |

| Home Phone | Displays a home phone number of the user |
|---|---|
| Mobile | Displays a mobile number of the user |
| Email | Displays an email ID of the user |
| Actions | List down the action to take. |

## Create Users

To add a new user:

1.  Click **Add User**. The **User Name and Password** and **User Info** tabs are populated.

2.  Enter the **User name**.

3.  Select the **User Type** from the following:

    a.  **Admin** - The user is an administrator for the application and has full rights across all the modules.

    b.  **User** - The user is an administrator and has restricted rights only.

    c.  **Control Operator** - The user is an control operator and has access to Control Agent Desktop.

    **Note**: This is currently not available for Webex Contact Center.

4.  For authentication type, select **Database Authentication**.

    This standard authentication method consisting of a username and a password, is used for different database systems. Aan instance of SQL Server can have multiple user accounts (using SQL authentication) with different usernames and passwords. SQL authentication is preferred on shared servers where various users have access to various databases. SQL Authentication is required when a client (remote computer) connects to an instance of SQL server on a computer other than the one the client is executing on.

    **Note**: This type of authentication does not offer the feature of password policy with respect to password composition or password expiry. For an effective password policy, use Windows Authentication. Your domain administrator can enforce the domain password policy for access to the application.

5.  Enter a **Password** to access the SQL server if your authentication type is **Database Authentication**. This field is mandatory.

6.  Re-enter to **Confirm Password** to access the SQL server if your authentication type is **Database Authentication**. This field is mandatory.

    **Note**:
    Password and Confirm Password fields are disabled if your choice is Windows Authentication. Continue with steps 9 through 13 if the user handles Salesforce CRM campaigns on Campaign Manager. Else skip to Step 14.

7. Enter **Domain Name** if your authentication is selected as **Windows Authentication**. This is disabled if Database Authentication is selected.

8. Enable **SF Credentials** toggle icon if the user handles SF CRM campaigns.

9. Enter the **SF User name**.

10. Enter the **SF Password**.

11. Enter the **SF Token details**.

    **Note** : SF Token is not a mandatory field. If you do not enter a token, the SF application validates the users based on the SF Username and SF Password fields configured above.

12. Click **VALIDATE SF CREDENTIAL** to complete user authentication.

13. Set the Concurrent Login switch **ON** if you allow the user to log in to the application concurrently. If you set this switch **OFF**, the application logs out the user from the earlier login after receiving confirmation.

14. Navigate to the **User Info** section.


**User Info**

1. Enter the **Home Phone** number of the user.

2. Enter the **Mobile** number of the user.

3. Enter the **City** that the user belongs.

4. Enter the **State** that the user is from.

5. Enter the **Zip code** for the home location.

6. Enter the user's **Email** address.

7. Complete the **Address1** and **Address2** fields.

8. Enter any **Comments.**

9. Click **Save** to complete.

Navigate to the **Roles Mapping** section to map roles to this user.


# Create Domain Users

To add a new user:

1. Click **Add User**. The **User Name and Password** and **User Info** tabs are populated.

**User Name and Password**

2. Enter the **User name**.

3. Select the **User Type** from the following:

     a. **Admin** - The user is an administrator for the application and has full rights across all the modules.

     b. **User** - The user is an administrator and has restricted rights only.

4. For authentication type, select **Windows Authentication**.

   **Windows Authentication**- This is typically Active Domain authentication. When the domain user logs in to the application, the authentication is established by matching the username/password combination with the given domain and access granted.

5. Enter a **Domain Name**.

6. The **Password** and the **Confirm Password** fields are disabled. The application authenticates the user against the domain password.

7. Enable **Salesforce Credentials** toggle icon if the user handles Service Cloud Voice campaigns.

8. Enter the **Salesforce User name**.

9. Enter the **Salesforce Password**.

10. Enter the **SalesforceToken details**.

**Note** : Salesforce Token is not a mandatory field. If you do not enter a token, the Service Cloud Voice application validates the users based on the Salesforce Username and Salesforce Password fields configured above.

11. Click **VALIDATE SF CREDENTIAL** to complete user authentication.

12. Set the Concurrent Login switch **ON** if you allow the user to log in to the application concurrently. If you set this switch **OFF**, the application logs out the user from the earlier login after receiving confirmation.

13. Navigate to the **User Info** section.

## User Info

14. Enter the **Home Phone** number of the user.

15. Enter the **Mobile** number of the user.

16. Enter the **City** that the user belongs.

17. Enter the **State** that the user is from.

18. Enter the **Zip code** for the home location.

19. Enter the user's **Email** address.

20. Complete the **Address1** and **Address2** fields.

21. Enter any **Comments.**

22. Click **Save** to complete.


## Create SSO Users

To add a new user:

1. Click **Add User**. The **User Name and Password** and **User Info** tabs are populated.


**User Name and Password**

2. Enter the **User name**.

3. Select the **User Type** from the following:

    a. **Admin** - The user is an administrator for the application and has full rights across all the modules.

    b. **User** - The user is an administrator and has restricted rights only.

4. For authentication type, select **SSO**

    **SSO** - This is the single sign-on protocol. These users are configured on a third-party identity authentication service provider. When the user logs in to the application, the validation of the user name and password is done by the SSO identity service provider. Upon successful validation, the user gets access to the application.

5. The **Password**, **Confirm Password**, and the **Domain Name** fields are disabled. The application authenticates the user via the third-party SSO provider.

6. Enable **SF Credentials** toggle icon if the user handles Service Cloud Voice campaigns.

7. Enter the **SF User name**.

8. Enter the **SF Password**.

9. Enter the **SF Token details**.

10. **Note** : SF Token is not a mandatory field. If you do not enter a token, the Service Cloud Voice application validates the users based on the SF Username and SF Password fields configured above.

11. Click **VALIDATE SF CREDENTIAL** to complete user authentication.

12. Set the Concurrent Login switch **ON** if you allow the user to log in to the application concurrently. If you set this switch **OFF**, the application logs out the user from the earlier login after receiving confirmation.

13. Navigate to the **User Info** section.

**User Info**

14. Enter the **Home Phone** number of the user.

15. Enter the **Mobile** number of the user.

16. Enter the **City** that the user belongs.

17. Enter the **State** that the user is from.

18. Enter the **Zip code** for the home location.

19. Enter the user's **Email** address.

20. Complete the **Address1** and **Address2** fields.

21. Enter any **Comments.**

22. Click **Save** to complete.

# Roles

Click **Roles** to view the Roles screen listing the available roles on the application.

To create Roles,

1. Click **Add** to open the **Roles Info** screen.

2. Enter a **Role Name**.

3. Enter the **Description** and click **Save**.

## Roles Mapping

Once the role is created, you can map the role using the mapping feature.

The **Roles Rights Mapping** section contains various rights that you can map to the role with respect to the application features like Campaign, Contact Strategy, and so on.

1. To map the role, click **Edit**to the specific role that you want to map.

2. The **Configure Roles** screen appears with the Roles Info and Rights Mapping sections

The Rights Listing table given below lists the rights that are available for you to map to users. Not all rights are applicable for every item listed here. Besides, there are few other rights that are applicable in specific aspects of the application.

**Rights Listing - Table**

| # | Rights | Description |
|---|--------|-------------|
| 1 | Create | The user is allowed to create a new entity. |

| | | |
|---|---|---|
| 2 | Update | The user to edit/update an existing entity. |
| 3 | Delete | Allows the user to delete the selected entity. |
| 4 | View | The user can only view the selected entity. |
| 5 | Upload | The user is allowed to upload data to the application, pertaining to the feature. |
| 6 | Configure | The user can configure details pertaining to the selected feature. |
| 7 | Save | The user is allowed to save the new creation / update data. |
| 8 | Execute | The user is allowed to perform runtime activity in respect of this entity. For example, the user can execute a campaign (change campaign state from Stop to Start or vice versa). |
| 9 | Enable | The user is allowed to Enable / Disable an entity. For example, a user can enable a campaign group. |
| 10 | Copy | The user can create a copy of an entity. For example, a user can create a copy of a campaign. |

See **Rights Mapping** table for details of allowed mapping for various aspects of the application.

**Rights Mapping - Table**

| # | Rights | Allowed Actions for the User |
|---|---|---|
| 1 | Users | This user can Ceate a new user, Update and Delete an existing user, and View all users. |
| 2 | Roles | This user can Create a new role, Update and Delete an existing roles, and View all roles. |
| 3 | Campaigns | At the Group level, this user can Create, Update, Delete, View, and Execute campaigns in the group. The user can also perform the same activities for the following entities in the group: Business Parameters, Server Scripts, Contact Selection Strategy, CSS Schedule, Runtime Scheduling, Contact Lists, Manage Contacts, Synchronize, Contact Parameters, Campaign Summary, SMS Template, Time Zone, Chaining, Holidays, Expression Builder, Campaign Target, Contact Mode Scheduling, Email Template, IVR Template Editor, Telephony Outcomes, and Dialer Settings. Note: When no further selection is made at the campaign level, the user with these rights can perform the activities for all the campaigns under the group. To restrict the rights to selected campaigns, select a Group and then a Campaign from the Campaigns column. At the Campaign level, this user can Create, Update, Delete, View, and Execute campaigns in the group. The user can also perform the same activities for the following entities in the group: Business Parameters, Server Scripts, Contact Selection Strategy, CSS Schedule, Runtime Scheduling, Contact Lists, Manage Contacts, Synchronize, Contact Parameters, Campaign Summary, SMS Template, Time Zone, Chaining, Holidays, Expression Builder, Campaign Target, Contact Mode Scheduling, Email Template, IVR Template Editor, Telephony Outcome, Agent Desktop Configuration, and Dialer Settings. |

| | | Note: Currently, this feature is not supported in Webex Contact Center. |
|---|---|---|
| 4 | Business Out-come | This user can Create, Update, Delete and View Business Outcomes at the application level. When user selects a specific Parent Business Outcome (listed in the Group column), the user can Update, Delete, and View only. |
| 5 | Call Strategy | This user can Create, Update, Delete and View Contact Strategies. When user selects a specific Contact Strategy (listed in the Group column), the user can Update, Delete, and View only. |
| 6 | Application Parameters | This user can only Update and View application parameters. |
| 7 | Compliance | This user is allowed to upload compliance contacts related to Do Not Call (DNC), National DNC, etc. |
| 8 | Time Zone | This user is allowed to Update and View the Time Zones on the application. |
| 9 | Holidays | This user can Create, Update, Delete, and View the Holidays on the application |
| 10 | Global Upload | The user is allowed to View the Global Upload configurations. If the Configure right is selected, the use is also to configure the requirements for Global Upload of contacts |
| 11 | State Laws | This user can Create, Update, Delete, and View the State Laws on the application. |
| 12 | Mode Config | This user is allowed Create, Update, Delete, and View modes at the application level |
| 13 | URL | This user can View and Update URLs on the application. |
| 14 | Reports | Select the campaigns for which this user can view the reports |
| 15 | Alerter | This user can View and Update the alerter configured on the application. |
| 16 | Area/Zip Code | This user can Save, Delete, Upload and View the Area /Zip codes available on the application. |
| 17 | RPC Attempt Counters | This user can View and Save the information in RPC Attempt Counter on the on the application. |
| 18 | Email | This user is allowed to View, Create, Update, and Delete the Email configuration details like SMTP. POP3, IMAP servers, etc. on the application. |
| 19 | SMS | This user is allowed to View, Create, Update, and Delete the SMS configuration details like Gateway Server IP, authentication, etc. on the application. |
| 20 | Dimension | This user is allowed to View, Create, Update, and Delete the Dimensions on the application. |
| 21 | Profile | This user is allowed to View, Create, Update, and Delete the Profiles used for uploading contacts, scrub uploads, etc |
| 22 | Unified List | This user can only Enable campaigns as Unified List campaigns |
| 23 | License | The user has rights only to View licenses. |
| 24 | Webservice | This has a unique right. The user can grant access to Webservice APIs |
| 25 | Area Code | This user can View and Update Area Code Split By Substring on the application |

| | Split By Sub-string | based on the assigned rights. |
|---|---|---|
| 26 | Domain Cre-dential | This user can View, Update, and Delete the Domain Credential on the application based on the assigned rights |
| 27 | Campaign Forecast | This user can view the campaign forecast page. However, this is based on the campaign entity mapping by an administrator. |

To revoke rights to a role, you can deselect the check box appropriate to its respective option.

# Script Designer

The Script Designer is a scripting tool that assists you in configuring call guides and 2-way SMS campaigns.

## 2-Way SMS

*Note: Currently, this feature is not supported in Webex Contact Center.*

While all outbound campaigns support one-way SMS, defined in the contact strategy, the Script Designer allows for the design of 2-Way SMS campaigns. These campaigns send out text messages based on configurations and also receive replies. These replies can be utilized for making business decisions. Each SMS sent out is stored as a session, and users can configure the session timeout as required.

Any replies received within the configured timeout period are tagged to the original SMS, allowing business decisions such as sending more text messages or taking actions based on customer responses. However, any response received after the configured timeout period is not tagged to the original SMS as a reply. In case of an invalid response, the same question is re-sent as an SMS.

## 2-Way SMS Reports

*Note: Currently, this feature is not supported in Webex Contact Center.*

The 2-Way SMS module comes with built-in reports that offer valuable insights into the performance of 2-Way SMS campaigns, considering parameters such as response time, completion time, and more.

- Campaign Level: This report populates the number of messages sent and received for the selected campaign. Additionally, it provides information on the number of messages sent and received categorized by SMS content.

- Campaign Session Details: This report showcases details for success, failed, completed, and in-progress SMS campaigns, both summarized and as separate reports for each.

- Average Completion Time: This report provides the average time taken to complete the session for contacts, along with contact session details.

- Average Response Time: This report displays the average time customers took to respond to a question, based on the input parameters provided.

# Call Guide

A Call Guide is a feature that allows an agent to view predefined questions to be asked or statements to be made when a call is connected. Depending on the answers received, the agent can choose to proceed to the next question or ask a supplementary question based on the previous response. Users have the flexibility to configure a set of questions, answers, and supplementary questions for agents to utilize during interactions. For more information, see Call Guide.

# Campaign

Using the Campaign to select available campaigns from the campaign groups, attach or replace questionnaire forms, and configure parameters for running a 2-Way SMS campaign. All available campaign groups are displayed on the left pane of the screen.

1. Click any campaign group to display all associated campaigns for this group. You can also use the Search box to search for campaigns.

2. Perform the following steps:

3. Select a **Campaign** from the list.

4. Select **2-Way SMS** from the dropdown.

5. Select a **Form Name** to map for this 2-way SMS campaign. See Forms for more details.

6. Enter a **Timeout** limit in DD:HH:MM. This is the duration up to which your campaign awaits responses form the customer. Messages that do not receive responses up to this limit are timed out. The default maximum timeout value is six (6) hours. To update the limit:

7. Select a **Timeout Disposition**. This is the Telephony or Business outcome you want to set for time out messages and these outcomes does not receive response.

8. Select a **Primary Short Code** for the campaign.

9. Select a **Secondary Short Code**[1] for the campaign.

---

[1]Short codes is also known as short numbers are special telephone numbers, significantly shorter than full telephone numbers, which can be used to receive SMS from certain/all service providers' mobile phones. Short codes are designed to be easier to read and remember than normal telephone numbers.

**Note**: The combination of short code and SMS to a phone number has to be unique. Using the same short code, a second SMS cannot be sent to the same number from the same or another campaign when a session already exists. In such cases, the application uses the Secondary Short Code if mapped.

10. Select a **Text Type**. You can select from **Dynamic**, **Static**, and **TwoWay**.

    **Note**: If you select the Text Type as Static, you cannot use a Prevalidator in the Forms page.

## Forms

An administrator can create a set of predefined questions or messages and attach them to a form. Each question or message is sent as an SMS to the contacts. Based on the response SMS provided by the customer, the next action is taken. Using the Form facility, create questions, write conditions to questions, and link one question to another based on the customer response. You can write a JavaScript function or use an in-built JavaScript function.

Perform the following steps:

1. Select a **Campaign** from the list.

2. Navigate to the **Form** tab to create a form. The following form elements are available for configuration:

    a. Global Variables

    b. Script Block

    c. Prevalidator

    d. Text

    e. Option Choice

3. Configure the Business field, Global Variable, Question Field, and Library Function.

### Global Variables

You can assign values to Global Variables and use them in the 2-Way SMS form. The values for these variables are appended to the SMS messages that are sent using this script.

**Note**:
This is an optional feature.
Global Variables are case-sensitive

Campaign Manager provides in-built global variables. These variables come with no default values. You have to assign values to these during runtime. You cannot edit or delete these Global Variable names.

- Sys_ID

- Sys_Fname

- Sys_Lname

- Sys_DOB

- Sys_Gender

- Sys_PhoneNumber

- Sys_Email

- Sys_AppointmentDate

- Sys_AppointmentTime

- Sys_LCMKey

To create a global variable:

1. Click **Global Variable** from the left pane.

2. Enter a **Key** and the assign a **Value**. For example, Account Type could be the key and Gold could be value.

3. Click **Add** to add more global variables.

4. Click **Delete** to delete a global variable.

   **Note**: You can delete only Global Variables that you have created. You cannot delete the in-built Global Variables listed.

5. Click **Remove** on the top-right of this section to delete all global variables.


## Script Block

You can write or use a JavaScript function to perform calculations or invoke a REST API Webservice. You can use any script function in the condition field, assign value, or call script fields. You can read global variables in the script but you cannot reset the value unless it is a non-primitive type.

 **Note**:
a. Script variable names and global variable names in the script should be unique.
b. ActiveX components and AJAX call are not supported in the script block.

Perform the following steps:

1. Drag and drop the **Script Block** on the left pane to display the screen.

2. Enter the script code text if it a new script, or copy and paste from an existing script.

3. Click the **Remove** to clear the script.

## Text

You can use the **Text block** to enter answers evoked in text form from customers.

1. Drag and drop the **Text** on the left pane to display the screen.

2. Continue the process to creating a form.

## Option Choice

You can use **Option Choice** to offer multiple choices to customers to select one or many answers when on a call with agents.

1. Drag and drop the **Option Choice** from the left pane to display the screen.

2. Continue the process to creating a form. See Creating a Form.

## Prevalidator

Pre-Validator is a condition builder that allows the user to build conditions while sending a message to the customers.

**Note**: You cannot add a Prevalidator if the Text Type in the Campaign page is Static.

Create the condition:

1. Select one of Businessfield, Global Variable, or Boolean Conditions.

2. Select a condition from the dropdown.

3. Select a value in the value text box.

4. Click **Add** or **Delete** to add or remove conditions.

5. If all the conditions are satisfied, the application sends messages (for 2-way-SMS) / questions (for Call Guide) to the customers. Simultaneously, these questions are also displayed on the Agent Desktop.

6. If the conditions are not satisfied, the messages/questions are not sent out to the customers.

7. After completing the Prevalidator section, continue the process to creating a form. See Creating a Form.

## Check Box

You can use **Check Box** offer questions of a **Yes** or **No** type to a customer. You can configure the application to indicate selection of check box means **Yes** and non-selection means **No**.

1. Drag and drop the **Check Box** on the left pane to display the screen.

2. Continue the process to creating a form.

## Choose from a List

You can use **Choose from a List** and offer questions where the answer is in a list. The customer chooses an answer from the options provided. If the answer provided in not in the list, it can be dynamically added to the list by the agent.

1. Drag and drop the **Choose from a list** on the left pane to display the screen.

2. Continue the process to creating a form.

## Create a Form

Perform the following step to create a form:

1. Enter a **Form Name** and **Description**.

2. Select the **Encoding Required** check box if you want your message to be encoded before being sent. This is decoded by the service provider before delivery to the customer.

   **Note**: Encoding is useful to deliver messages (in languages with non-Roman script) without text being garbled.

3. The following properties in the *web.config* file of the **LCMITREngine** control this feature:

   ```
   <add key="EnableTextEncode" value="true" />
   <add key="TypeofEncode" value="Unicode2Hex" />
   ```

4. Enter a **Question Title**. You can create any number of questions on a form.

5. Enter a **Question Text** that is sent out as an SMS to the contacts for this campaign.

6. From the **Conditions** dropdown, select the conditions for this question. To add condition, see "Build Condition " on the next page.

7. Click **Save**.

8. Click **Copy** to copy a form from one campaign to other campaigns within the same campaign group. You cannot copy forms across campaign groups. Also, ensure business fields you created in the forms are in sync with those in the campaign.

9. From the **Select Campaign** dropdown, select the campaign to which you want to copy this form. Enter a unique name in the Form Name field.

10. Click **Create** to create a form. The Saved successfully message appears for confirmation.

11. Click **Delete** to delete a form. Click **OK** to delete and dismiss the dialog box.


**Build Condition**

1. From the **Conditions** dropdown, select the conditions for this question.

2. The **Question Fields**, **Global Variables**, or **Boolean Conditions** for which you want to write conditions.

3. The condition for the question or global variable. Using these conditions users can validate both numeric and string data types. Available choices for the condition are:

   a. Is exactly equal to

   b. Is greater than

   c. Is greater than or equal to

   d. Is less than

   e. Is less than or equal to

   f. Is not equal to

   g. Is starting with

   h. Is ending with

   i. Is contains

   **Note**: When performing wildcard functions is starting with, is ending with, and is contains, prefix and suffix the string with the "%" sign. For example, %searchvalue%.

4. Enter a value for the condition. You can use a business field, global variable, JavaScript function, or question field as a value by dragging and dropping them here. You can invoke a Webservice call.

5. You can also give a custom value such as expressions, hard-coded value, and so on.

6. Select the condition form the dropdown for the next action after this question:

7. Select Bot: Select this to choose a chat bot. Select a chat bot from the next dropdown. Set a success outcome for the chat bot from the corresponding outcomes dropdown and enter an appropriate end session message in the text box, next to it. Repeat the same procedure as applicable for a failure outcome and click Save.

8. Select Bot and Execute Script: Select this to choose a chat bot and execute a definite script. Select a chat bot from the next dropdown. In the ChatBot Success section, select an option (If true, If false) from the Boolean Conditions dropdown. Enter a script function name or a boolean expression in the text field, next to the Boolean Conditions dropdown. Choose a corresponding end session outcome and the session message for the command. Repeat the same to set up a command for the ELSE condition.

9. Go to Next Question: Select this option to send the next question as an SMS to a contact based on the answer received for this SMS. In the Select question dropdown list, select the next question to be followed after this question is sent

10. Reset & Go to Next Question: Select this option to send the next SMS question as an SMS to a contact by resetting the previous answers for the preceded questions. In the Select question dropdown list, select the next question to be followed after this question is sent.

11. Assign Value: Select this option to assign a value for a global variable. In the Select Variable dropdown list, select the global variable for which you want to assign a value. In the adjacent field, use a business field, question field (the answer you received for this question), JavaScript function, or even a global variable as a value by dragging and dropping on this field. You can also give a custom value. By assigning a new value for a global variable, the old value is removed from the memory and the new value is taken. After assigning a value for a global variable, select the next option you want from the next dropdown list.

12. End session: Select this option to end this session. By selecting this option, the session stops after this question is sent. In the Select disposition dropdown list, select a business or telephony disposition. You can send an End session message such as Thanks for participating as a thank you message. This is optional and works only if the response received matches the condition. If an invalid response is received, the same question is re-sent as an SMS.

13. Call script: Select this option to call a JavaScript function. Enter the script function name in the adjacent field to complete this action. By selecting this option, you can perform custom actions such as calling a Web service, validation, etc. Select the next option you want from the next dropdown list. You cannot return a value from JavaScript function.

    **Note**: You cannot reset primitive types such as integer, float, decimal, string, etc.

14. Click the **Edit** to edit the fields.

15. Use the **+ Add** to add another AND or OR condition.

**Business Fields**

All business fields associated with a campaign are populated in this section.

From the left pane, drag and drop the business fields on the value fields to store business fields for conditions. [BFLD.BusinessFieldName] is the format for business field.

**Global Variables**

You can assign values to Global Variables and use them in the 2-Way SMS form. The values for these variables are appended to the SMS messages that are sent using this script.

**Note**:
This is an optional feature.
Global Variables are case-sensitive

Campaign Manager provides in-built global variables. These variables come with no default values. You have to assign values to these during runtime. You cannot edit or delete these Global Variable names.

- Sys_ID
- Sys_Fname
- Sys_Lname
- Sys_DOB
- Sys_Gender
- Sys_PhoneNumber
- Sys_Email
- Sys_AppointmentDate
- Sys_AppointmentTime
- Sys_LCMKey

To create a global variable:

1. Click **Global Variable** from the left pane.

2. Enter a **Key** and the assign a **Value**. For example, Account Type could be the key and Gold could be value.

3. Click **Add** to add more global variables.

4. Click **Delete** to delete a global variable.

   **Note**: You can delete only Global Variables that you have created. You cannot delete the in-built Global Variables listed.

5. Click **Remove** on the top-right of this section to delete all global variables.


**Question Fields**

All question fields created for this form are populated here. Add any number of question fields (answer you received for this question) in a question block. You can use question fields in the text area or anywhere in the conditions fields. From the left pane, drag and drop the question fields to set or store this answer for the selected condition.

 **Note**:
a. String is generally used as the datatype for Question Field. If you want to use a datatype other than string, use the corresponding JavaScript parsing functions such as (parseInt(), parseFloat(), etc.
b. Question field values are case-sensitive.

Hovering over the Question pane shows a slew of options that you can exercise:

1. Click the **Copy** to copy a question.

2. Click **Paste** to paste a copied question from the clipboard.

3. Click **Discard** to discard the copied question from the clipboard.

4. Hold and drag the question to move the question to a different position - for example, from third question to fifth question.

5. Click **Delete** to delete a question. Click OK to delete and dismiss the dialog box.

**Pre-Validator**

Pre-Validator is a condition builder that allows the user to build conditions while sending a message to the customers.

**Note**: You cannot add a Prevalidator if the Text Type in the Campaign page is Static.

Create the condition:

1. Select one of Businessfield, Global Variable, or Boolean Conditions.

2. Select a condition from the dropdown.

3. Select a value in the value text box.

4. Click **Add** or **Delete** to add or remove conditions.

5. If all the conditions are satisfied, the application sends messages (for 2-way-SMS) / questions (for Call Guide) to the customers. Simultaneously, these questions are also displayed on the Agent Desktop.

6. If the conditions are not satisfied, the messages/questions are not sent out to the customers.

7. After completing the Prevalidator section, continue the process to creating a form. See Creating a Form.

**Library Functions**

Campaign Manager provides a list of in-built JavaScript functions. You can also create customized JavaScripts in the Script Block.

Drag and drop the library functions from the left pane to the value field. The format for library function is *txml.(FunctionName)*. For example, txml.ToLower("GOLD").

Use Library Functions for the following fields:

- Assign Value
- Call Script

- Boolean Condition
- Value Field
- Text Area

## Reports

The following reports are available:

- Campaign Level - Populates the number of messages sent and received for the selected campaign. Besides, this report also populates the number of messages sent and received by SMS content.
- Campaign Session Details - Shows the details for success, failed, completed, in progress SMS campaigns, both as a summary and as separate report for each.
- Average Completion Time - Gives the average time taken to complete the session for call contacts as also the contact session details.
- Call Guide- Displays the campaign name and number of contacts.

### Campaign Level

You can view the following reports at the campaign level:

- Recent SMS Deliveries - Chart and Table views
- Messages Sent and Received by Hour
- Messages Sent and Received by Contact
- Messages Sent and Received by Content

**View report**

To view report:

1. Navigate to the **Script Designer**> **Campaign**. Select the campaign from left pane.

2. Select a **From Date** and **To Date** from the date panel.

   **Note**: The default reporting period is set as one week for campaign lever report and one day for for Average Completion report.

3. Select a **Campaign Group** and **Campaign** from the dropdown. Click **Select All** to select the campaign at once. Select all option is not applicable for the Average Response Time report.

4. Select the Form for which you want the report. These forms are displayed based on the selected campaign.

5. Enter a **Contact Number** to which you sent messages.

**Recent SMS Deliveries**

This report displays the number of messages sent for a campaign.

The vertical axis contains the number of messages sent and the horizontal axis contains the campaigns for which the messages were sent. The Chart view displays the report only for the most recent 25 campaigns.

**Messages Sent and Received By Hour**

Click any campaign to drill down to the Messages Sent and Received by Hour report.

The report contains the following information:

| Field | Description |
|---|---|
| Campaign Name | The Campaign for which the report is rendered. |
| Date | The date on which the messages were sent from this campaign. |
| Time | The time interval for this line entry. |
| Messages Sent | The number of messages sent within this time interval. |
| Messages Received | The number of messages received within this time interval. The date and time the call guide was used. |

**Messages Sent and Received for all Contacts**

This report details the number of messages sent to and the number of responses received from each contact in the selected campaign.

The report contains the following information:

| Field | Description |
|---|---|
| Campaign Name | The Campaign for which the report is rendered. |
| Contact Number | The contact number to which the messages were sent from this campaign. |
| Session Started At | The SMS session start time for this contact. |
| Sent | The number of messages sent to this contact number. |
| Received | The number of messages received from this contact number. |

| | The status for this contact number. One of the following: |
|---|---|
| Status | • Completed<br>• Timed Out<br>• Failed<br>• In Progress |

**Messages Sent and Received by Content**

This report displays the content of all questions for a specific contact.

The report contains the following information:

| Field | Description |
|---|---|
| Campaign Name | The Campaign for which the report is rendered. |
| Form Name | The Form Name using which the messages were sent. |
| Contact Number | The contact number to which the messages were sent from this campaign. |
| Message | The content of the SMS message that was sent to the contact. |
| Date Time | The date and time when this message was sent to the contact. |

## Average Completion Time

The report gives information of the average time taken in hours to complete a full session for contacts where at least one SMS is sent out. The report displays the most recent 25 campaigns. It does not take into account sessions that average more than six hours per session.

Report includes the following parameters:

| Field | Description |
|---|---|
| Campaign Name | Name of the campaign for which report is rendered. |
| Average Completion Time (Hours/Minutes) | Average completion time in hours for a session where at least one SMS is sent to a contact for a campaign. |

## Average Response Time

The report displays the average time taken to respond to a question for the selected form.

Click **Average Response Time** to complete the report parameters. This is mandatory. Click **Search** to display the report in the Chart view.

Report includes the following parameters:

| Field | Description |
|---|---|
| Campaign Name | Name of the campaign for which report is rendered. |
| From Name | Form Name using which the messages were sent. |
| Question Title | contact number to which the messages were sent from this campaign. |
| Average Response Time (Mins: Secs) | Average time taken for customers to respond to this question. |

## Call Guide

The **Call Guide Report** is rendered both as a **Chart** and as a **Table**. The both views show the number of contacts that the agents have used the call guide on. Click **Campaign Name** in the table view or the chart to drill down to more detailed reports.

Perform the following steps:

1. Select a **Campaign Group** from the list.
2. Select **Call Guide** from the dropdown.
3. Select a **Form Name** to map for this 2-way SMS campaign.

### Call Survey By Hour

The Call Survey By Hour shows the campaign-wise call guide usage by the hour.

This page displays the report **All Contacts with No of Questions Answered** and the report includes the following parameters:

| Field | Description |
|---|---|
| Campaign Name | Name of the campaign for which report is rendered. |
| Agent ID | Agent using this call guide. |
| LCMKey | It is a unique ID to identify a call attempt for a contact. |
| Contact Number | Contact number on which the customer was reached. |
| Activity At | Date and time the call guide was used. |
| Total Question Answered | Number of questions answered by the customer during the interaction. |

# Configuration

Short codes known as short numbers are special telephone numbers, significantly shorter than full telephone numbers that can be used to receive SMS from certain/all service providers' mobile phones. Short codes are designed to be easier to read and remember than normal telephone numbers.

2-Way SMS feature allows you to configure two short codes using one as a primary short code and the other as a secondary short code.

Using the **Configuration** feature, you can configure the short codes using which messages are sent to contacts and the responses are received on this short code.

1. Navigate to the **Configuration** and enter the following details:

2. Enter a Display Name.

3. Enter a short code. The short code must contain only alphanumeric and hyphen characters. This is displayed as the sender's address name to the customers receiving SMS messages.

## Limitations

There are certain limitations that administrators encounters when configuring 2-Way SMS module component.

### Business Fields

Business parameters created with blank spaces in their names do not show for selection in the 2-Way SMS module. When the business fields you mapped for a form are modified or deleted in Business Parameter, the changes are not reflected in the 2-Way SMS module. However, when you open and save the form for which the business fields were modified, a dialog box appears prompting the changes that were made in the business fields. The modified business fields are populated on the left pane under the Business Fields pane. Configure the required changes for business fields in the form section.

### Forms

You can modify an active form for which the campaign is running. But the changes made in the form are not applied to the contacts in progress. The modified changes are applied to the fresh contacts for the specific campaign. However, if the service is restarted, the modified changes are applied to the contacts in progress.

### Conditions

The inactive (gray in color) form elements are not applicable.

**Functions**

When you are defining a JavaScript function, the format should begin with *txml.* and end with semicolon (;)

Syntax

```
txml.FunctionName = function (A,B)
{
//Please enter your code here
return A+B;
};
```

When you are calling a function in the question text area or in the End Session message field, the following formats apply:

Syntax

```
[txml.func-name(GlobalVariableName, BFLD.BusinessFieldName, QFLD.QuestionFieldName)]
```

It is mandatory to prefix the business fields and question fields with BFLD and QFLD. When you are calling a function in the condition field, the following formats apply:

Syntax

```
txml.func-name(GlobalVariableName, BFLD.BusinessFieldName, QFLD.QuestionFieldName)
```

Or

```
txml.func-name([GlobalVariableName], [BFLD.BusinessFieldName], [QFLD.QuestionFieldName])
```

Or

```
[txml.func-name(GlobalVariableName, BFLD.BusinessFieldName, QFLD.QuestionFieldName)]
```

It is mandatory that you prefix the business fields and question fields with BFLD and QFLD. If you want to pass a hard-coded value, enclose it with single quotes (for example, value).

**Note**:
String is generally used as the datatype for Question Field. If you want to use a datatype other than string, use the corresponding JavaScript parsing functions such as parseInt(QFLD.QuestionFieldName), parseFloat (QFLD.QuestionFieldName), and so on.
JQuery and latest JavaScript frameworks are not supported.

**Webservice**

To invoke a Webservice for database manipulation, use the following code snippet in the script when creating a form.

 **Note**: Expose the REST API Web service or Web API methods to retrieve value from database. ASMX Web service is not supported.

The following example explains a method called GetRating() which returns rating based on the entered phone number.

**Example 1**

Exposing the REST API Webservice call through JavaScript.

```
txml.GetRating = function (phone)
{
var url = 'http://localhost/TestRestService/Con-tactService.svc/GetRating/'+ phone;
return (new WebClient()).DownloadString(url);
};
```

**Example 2**

Using the JavaScript code to get an URL:

```
txml.getUrl = function (phone)
{
var url = 'http://localhost/TestRestService/ContactSer-vice.svc/GetRating/'+ phone;
return url;
};
```

Use the code on the condition field:

```
(new WebClient()).DownloadString(txml.getUrl( QFLD.phone )
```

**Example 3**

Use the code on the condition field:

```
(new WebClient()) .DownloadString('http://localhost/TestRestSer-vice/ContactSer-vice.svc/GetRating/'+ phone)
```

The following is the sample REST API code (.NET) for the above methods:

```
[ServiceContract]
public interface IContact
{
[OperationContract]
[WebGet(UriTemplate = "GetRating/{phonenumber}",
RequestFormat = WebMessageFormat.Json, ResponseFormat = WebMessageFormat.Json)]
int GetRating(string PhoneNumber);
}
public class ContactService : IContact
{
public int GetRating(string PhoneNumber)
{
return ContactDataAccess.GetRating(PhoneNumber);
}
}
```

# Call Guide

Call Guide is a facility that helps an agent with predefined questions to present to a contact when a call is connected. Based on the answers, the agent can either proceed to the next question or ask a supplementary question taking off from the previous question. You can configure a set of questions, answers, and supplementary questions for the agents to use.

**Campaign**

Navigate to the **Campaign** and select available campaigns from the displayed campaign groups, attach or replace questionnaire forms, and configure parameters for running a 2-Way SMS campaign.

All available campaign groups are displayed on the left pane of the screen. Click any **Campaign Group** to display all associated campaigns for this group. You can also use the Search box to search for campaigns.

The **Call Guide Report** is rendered both as a **Chart** and as a **Table**. The both views show the number of contacts that the agents have used the call guide on.

To drill down to more detailed reports, click **Campaign Name** in the table view or the chart displayed for the campaign in the chart view. The both views present detailed reports.

Perform the following steps:

1. Select a **Campaign Group** from the list.
2. Select **Call Guide** from the dropdown.
3. Select a **Form Name** to map for this 2-way SMS campaign.

## Form

An administrator can create a set of predefined questions or messages and attach them to a form. Each question or message is sent as an SMS to the contacts. Based on the response SMS provided by the customer, the next action is taken. Using the Form facility, create questions, write conditions to questions, and link one question to another based on the customer response. You can write a JavaScript function or use an in-built JavaScript function.

Perform the following steps:

1. Select a **Campaign** from the list.
2. Navigate to the **Form** tab to create a form. The following form elements are available for configuration:
    a. Global Variables
    b. Script Block
    c. Prevalidator
    d. Text
    e. Option Choice
3. Configure the Business field, Global Variable, Question Field, and Library Function.

For more Information, see Form of Call Guide.

## Question Sequencing

The call guide configuration helps the agent to deal with the customer call in a proper and structured manner. Beginning with the welcome message, obtaining details, and then signing off with a farewell message, all of these can be accomplished by sequencing the questions properly. For more information, see Question Sequencing.

## Copying a Form

Click **Copy** to copy this form to other campaigns within this campaign group. When copying a form to other campaigns, make sure the business fields created in the campaigns are in sync with the business fields you configured in the form.

**Note**: You cannot copy forms across the campaign groups.

1. Select the campaign from the Select Campaign dropdown to which you want to copy this form. Enter a unique name in the Form Name field. Click **Create** to create a form.

2. Click **Delete** to delete a form. Click **OK** on the confirmation pop-up.

3. Select **New Form** from the dropdown to create a new form or select the desired form to edit an existing form.

**Library Functions**

Campaign Manager provides a list of in-built JavaScript functions. You can also create customized JavaScripts in the Script Block.

Drag and drop the library functions from the left pane to the value field. The format for library function is *txml.(FunctionName)*. For example, txml.ToLower("GOLD").

Use Library Functions for the following fields:

- Assign Value
- Call Script
- Boolean Condition
- Value Field
- Text Area

**Form**

**Global Variables**

You can assign values to Global Variables and use them in the 2-Way SMS form. The values for these variables are appended to the SMS messages that are sent using this script.

**Note**:
This is an optional feature.
Global Variables are case-sensitive

Campaign Manager provides in-built global variables. These variables come with no default values. You have to assign values to these during runtime. You cannot edit or delete these Global Variable names.

- Sys_ID
- Sys_Fname
- Sys_Lname
- Sys_DOB

- Sys_Gender
- Sys_PhoneNumber
- Sys_Email
- Sys_AppointmentDate
- Sys_AppointmentTime
- Sys_LCMKey

To create a global variable:

1. Click **Global Variable** from the left pane.

2. Enter a **Key** and the assign a **Value**. For example, Account Type could be the key and Gold could be value.

3. Click **Add** to add more global variables.

4. Click **Delete** to delete a global variable.

   **Note**: You can delete only Global Variables that you have created. You cannot delete the in-built Global Variables listed.

5. Click **Remove** on the top-right of this section to delete all global variables.

**Script Block**

You can write or use a JavaScript function to perform calculations or invoke a REST API Webservice. You can use any script function in the condition field, assign value, or call script fields. You can read global variables in the script but you cannot reset the value unless it is a non-primitive type.

 **Note**:
a. Script variable names and global variable names in the script should be unique.
b. ActiveX components and AJAX call are not supported in the script block.

Perform the following steps:

1. Drag and drop the **Script Block** on the left pane to display the screen.

2. Enter the script code text if it a new script, or copy and paste from an existing script.

3. Click the **Remove** to clear the script.

**Text Thank You**

When the entire flow is completed, the agent can sign off with any message - a Thank You or a promotional message. You can also tag a business field (for example, first name or a last name).

**Business Fields**

All business fields associated with a campaign are populated in this section. From the left pane, drag and drop the business fields on the value fields to store business fields for conditions. [BFLD.BusinessFieldName] is the format for business field.

**Question Fields**

All question fields created for this form are populated here. Add any number of question fields (answer you received for this question) in a question block. You can use question fields in the text area or anywhere in the conditions fields. From the left pane, drag and drop the question fields to set or store this answer for the selected condition.

Note:
a. String is generally used as the datatype for Question Field. If you want to use a datatype other than string, use the corresponding JavaScript parsing functions such as (parseInt(), parseFloat(), etc.
b. Question field values are case-sensitive.

Hovering over the Question pane shows a slew of options that you can exercise:

1. Click the **Copy** to copy a question.

2. Click **Paste** to paste a copied question from the clipboard.

3. Click **Discard** to discard the copied question from the clipboard.

4. Hold and drag the question to move the question to a different position - for example, from third question to fifth question.

5. Click **Delete** to delete a question. Click OK to delete and dismiss the dialog box.

**Multiple Choice**

You can also configure a question that has multiple answers. You can list the answers that the agent selects from his desktop as the customer selects. For example, the campaign has a question on the assets that a cus-tomer holds such as home, car, motorcycle, and so on. The agent can select multiple assets that the customer holds.

**Check Box**

You can use **Check Box** offer questions of a **Yes** or **No** type to a customer. You can configure the application to indicate selection of check box means **Yes** and non-selection means **No**.

1. Drag and drop the **Check Box** on the left pane to display the screen.

2. Continue the process to creating a form.

**Choose from a List**

You can use **Choose from a List** and offer questions where the answer is in a list. The customer chooses an answer from the options provided. If the answer provided in not in the list, it can be dynamically added to the list by the agent.

1. Drag and drop the **Choose from a list** on the left pane to display the screen.

2. Continue the process to creating a form.

## Question Sequencing

The call guide configuration helps the agent to deal with the customer call in a proper and structured manner. Beginning with the welcome message, obtaining details, and then signing off with a farewell message, all of these can be accomplished by sequencing the questions properly.

Expand the question to open the sequencing section. You can also validate some information that you obtain from the customer.

Example, you can validate an account number if the account is valid, the call guide must be configured for the next question.

The call guide should hint to the agent to inform about the invalid customer number and drop the call. The conditions shown can be used to validate the information given by the customer.

Using these conditions, users can validate both numeric and string data types. The following conditions are available:

- Is exactly equal to
- Is greater than
- Is greater than or equal to
- Is less than
- Is less than or equal to
- Is not equal to
- Is starting with
- Is ending with
- Is contains

**Note**: When performing wildcard functions is starting with, is ending with, and is contains, prefix and suffix the string with the % sign. For example, %searchvalue%.

After validation, you can configure different sequencing dependent on the customer response. You

have the following options to configure the question sequencing:

- Go to next question: Select this option to go to a next question. In the Select question dropdown, select the next question.

- Reset & Go to next question: Select this option to ask the next question to a customer by resetting the previous answers for the preceded questions. In the Select question dropdown list, select the next question to be followed after this question is sent.

- Assign value: Select this option to assign a value for a global variable. In the Select Variable dropdown list, select the global variable for which you want to assign a value. In the adjacent field, use a business field, question field (the answer you received for this question), JavaScript function, or even a global variable as a value by dragging and dropping on this field. You can also give a custom value. By assigning a new value for a global variable, the old value is removed from the memory and the new value is taken. After assigning a value for a global variable, select the next option you want from the next dropdown.

- End session: Select this option to end this session. By selecting this option, the session stops after this question is sent. In the Select disposition dropdown, select a business or telephony disposition. You can configure End session message such as Thanks for participating for the agent to read out to the customer.

- Call script: Select this option to call a JavaScript function. Enter the script function name in the adjacent field to complete this action. By selecting this option, you can perform custom actions such as calling a Web service, validation, etc. Select the next option you want from the next dropdown list. You cannot return a value from JavaScript function.

- Click **Save** to save this form.

  Note: You can save a form without having to address the question or condition fields. Enter a form name and its description to save a form.
  You can open an existing form to create questions and add conditions later.

# Alerts

Alerts serve as notifications for campaigns and system-level events. System-level alerts are generated through the monitoring of different components. In addition to displaying component-level exception alerts on the Console, the application also sends emails to configured recipients. These alerts play a crucial role in troubleshooting the application. This section provides an overview of Alerts and outlines various settings to maximize the effectiveness of this feature.

Using the Simple Network Management Protocol (SNMP), exceptions are logged to a configured Receiver IP address or Port. There are various options available to alert a user.

## System Notifications

The System section contains all the configurations essential for monitoring various components and transmitting exceptions as notifications.

## Campaign Monitor

Campaign alerts are specifically designed to send notifications to administrators regarding contact-related statistics for selected campaigns.

## Campaign Forecast

The Campaign Forecast is a functionality that displays the projection of contacts that may either be dialed out or blocked in the upcoming three hours. The Campaign Forecast page presents two tabs: Contact Delivery Forecast and Contact Exclusion Forecast.

## System Notifications

Campaign Manager has the capability to send the SNMP traps from any configured core components using SNMP (Simple Network Management Protocol). On the occurrence of a configured event, the respective component sends an alert to the list of third-party monitoring apps. The alerts comprise the event code and the description. You can configure up to three third-party monitoring apps to receive this information. Campaign Manager has an in-built SNMP receiver that also acts as a third-monitoring app of the three monitoring apps allowed. Using this app as one of the third-party monitoring apps gives you the advantage of having the events notified on the Campaign Manager home page.

When an agent detects an alarm condition, the agent:

- Logs information about the time, type, and severity of the condition
- Generates a notification message, which it then sends to a designated IP host

SNMP notifications are sent as one of the following:

- Traps - Unreliable messages, which do not require receipt acknowledgment from the SNMP manager.
- Informs - Reliable messages, which are stored in memory until the SNMP manager issues a response. Informs use more system resources than traps.

To use SNMP notifications on your system, you must specify their recipients. These recipients indicate where Network Registrar notifications are directed. By default, all notifications are enabled, but no recipients are defined. Until you define the recipients, no notifications are sent.

## Notification

Notification section displays the number of alert events. Dismiss All icon allows you to Dismiss All the notifications in one go. Use the Search box to populate results from the Campaign Name and Alert Event columns, based on the search string. You can also dismiss individual notifications by clicking the Dismiss icon against each notification.

Navigate to **Alert** > **System** > **Navigate** to view Notification.

## Settings

Use the **Settings** tab to control all the components and the specific events under each component that you intend monitoring.

1. Expand any component to see the listed **Alert Event Code** and the **Alert Event**.

2. To monitor events in a component, turn the **Component Enable** switch **ON**. Only if this switch is turned **ON**, the application starts monitoring logs for selected events within the component and sends notifications.

3. To monitor specific events and receive alerts, turn the **Enable** switch **ON** for the specific event.

4. Ensure to complete this exercise for all the components that you need to monitor.

| Components | Code | Alert Codes From |
|---|---|---|
| LCMFeedEngine | 2 | 2.10000 |
| LCMContactRescheduler | 3 | 3.10000 |
| LCMGenericService | 4 | 4.10000 |
| LCMScritpEngine | 5 | 5.10000 |
| LCMReportingService | 6 | 6.10000 |
| LCMLicenseManager | 7 | 7.10000 |
| LCMContactsUploader | 8 | 8.10000 |
| LCMScriptDesigner | 9 | 9.10000 |
| LCMWebservice | 10 | 10.10000 |
| LCMGlobalUploader | 12 | 12.10000 |
| LCMComplianceUploader | 13 | 13.10000 |
| LCMAgentStateMachineFinesse | 14 | 14.10000 |
| LCMTenantService | 15 | 15.10000 |
| LCMITREngine | 16 | 16.10000 |
| LCMReportsByMail | 18 | 18.10000 |

| LCMAlerter | 19 | 19.10000 |
|---|---|---|
| CRMConnector | 20 | 20.10000 |
| Dialer | 21 | 21.10000 |
| LCMCampaignECT | 25 | 25.10000 |
| LCMEmailEngine | 26 | 26.10000 |

## Email Settings

The alerts listed by the SNMP Receiver can be sent to selected recipients over Email. This helps the recipients troubleshoot specific events.

To send notification by email:

1. Navigate to **Alerts** > **System** > **Notification** > **Email Settings**.

2. Enable the **Email Notification** switch to send the notifications by Email.

   **Note**: A restart of the SNMPReceiver service is required only if this switch is turned OFF or ON. No restart is required if any changes are made in fields described in Step 2 through 4 below.

3. Enter the value in the **Suppress Duplicate Events (In Minutes)** field. It is used to suppress duplicate alert notifications for the same event within the configured period.

   Example, Suppress Duplicate Events (In Minutes) is configured as 15 minutes. If there is an Exception1 in Component1 which is logged at 11.30 am, this exception is not logged again if it occurs before 11.45 am.

4. Enter **Recipient Email** address. Separate multiple Email addresses by a comma. This is a mandatory field.

   **Note**: Email address of a sender is picked from the Alerter section and populated in the From field of the Email message.

5. Enter an **Email Subject**. This forms the subject line for Email alerts sent out for exceptions. This is a mandatory field.

6. Click **Save**.

## Monitoring App

SNMP Receiver service monitors all the components and receives the exceptions data. Based on the Email Settings, this data is then transmitted via Email. Configure the Monitoring App to enable the SNMP Receiver service.

1. Navigate to to **Alerts** > **System** > **Notification** > **Monitoring App**.

2. Enter the App Name, IP Address and Port.

**Note**: SNMP Receiver service configuration file contains two properties SNMPTrapMgrIP and SNMPTrapMgrPort. The IP and Port mentioned in the Monitoring App must match the values configured here.

3. Click **Save**.

4. If you have other apps that are monitoring Campaign Manager, you may configure details in App 2 and App 3 as required.

**Alert Message Details**

When configured third-party apps are monitoring the application, the SNMP alerts are sent out to those apps in the Object ID (OID) format: *1.3.6.1.4.1.52914.8.200020*

| Number | Label | Details |
|---|---|---|
| 1 | ISO | The group that established this standard. In this case, it is ISO. |
| 3 | ORG | This is an organization. |
| 6 | DOD | This indicates the US Department of Defense, the organization that established the earliest form of the Internet. |
| 1 | Internet | This is the communication mode, most frequently the Internet. |
| 4 | Private | This is a device manufacturer's nature of organization. In this case, it is a private entity. |
| 1 | Enterprise | The classification of the private entity. In this case, it is classified as a private enterprise. |
| 52914 | Enterprise Number | The enterprise number for the product. |
| 8 | Component ID | The component ID within the product being monitored. In this case, there are three components. Feed Engine (ID 2), Contact Rescheduler (ID 3), and Contact Uploader (ID 8). |
| 200020 | Event ID | This is the event ID within the component. For all events, the last digit 0 indicates Failure; 1 indicates Success. |

**Fields**

| Fields | Description |
|---|---|
| Component Name | Name of the component. |

| Alert Event Code | Displays alert even code. |
|---|---|
| Alert Event | Displays alert event name. |
| Occurred | Displays date and time when an event has occurred. |
| Dismiss | Allows you to dismiss a notification. |
| Suppress Duplicate Events | It is used to suppress duplicate alert notifications for the same event within the configured period. |
| Email Subject | Describes what an email is about. |
| Recipient Email | Receiver email address. |

# Campaign Monitor

Campaign alerts are designed to send out alerts to administrators about contact-related statistics for selected campaigns. This helps the administrators take corrective action and keep the application running in a healthy state. Ensure that the Settings, Email Settings, and Monitoring App sections are complete to receive exception alerts. If the configurations are not completed, only number relating to contacts are populated.

You can select the time zone for which you want the Campaign Monitor result. Select the Time Zone from the dropdown listing, if the list is visible. The application converts the datetime based on the time zone selected by the user and renders the Campaign Monitor result. This is an optional configuration. The property **IsTimeZoneRequiredForFilter** must be set to true in the *Service web.config* file to get Campaign Monitor result by time zone.

Example, if the user selects GMT as the time zone and the server is in the IST time zone, the report shows data from 0530 am, since this is equivalent to 00.00 of GMT.

1. Navigate to **Alerts** > **Campaign**.

2. Select the **Campaigns** and **Time Zones**.

3. Click **Show Records** see the monitor results.

4. Click **Export** to download the data to an Excel workbook.

5. Select the specific time **Slot** in which you want alerts to be published. The first column always shows the current time slot, and scrolling right, you can move to earlier time slots. You can see the exceptions in 15- or 30-minute slots and 1- or 2-hour slots.

6. If required, use to search option to find a specific campaign record.

7. Data containing exceptions are highlighted in red background. Besides, the notification icon on the application header shown the number of exceptions. The Campaign Name column also identifies campaigns having alerts with a warning before the campaign name.

8. Click the number displayed in any cell in the grid to open the exceptions listing pop up. Only the top 50 exceptions are listed. Cick the **SHOW ALL RECORDS** button to see the entire list.

**Fields**

| Field | Description |
|---|---|
| Campaign Name | Name of the Campaign |
| Uploaded | Number of uploaded contacts |
| Delivered | Number of delivered contacts |
| Processed | Number of processed contacts |

# Campaign Forecast

Campaign Forecast is a feature where the application displays the forecast of the contacts that could be dialed out or blocked in the next three hours of time. The Campaign Forecast page displays two tabs - Contact Delivery Forecast and Contact Exclusion Forecast.

## Contact Delivery Forecast

Contact Delivery Forecast displays the forecast of the possible number of contacts that could be dialed out in the next three hours, starting from the last accessed or refreshed time. The forecast presents the data split into 15-minute intervals.

1. Navigate to **Alerts** > **Campaign Forecast** > **Contact Delivery Forecast**.

2. Select the **Time Zone** for which you want the Contact Delivery Forecast data. The application converts the datetime based on the time zone selected by the user and renders the Contact Delivery Forecast data. This is an optional configuration. The property IsTimeZoneRequiredForFilter must be set to true in the Service web.config file to get Contact Delivery Forecast by time zone.

   Example, if the user selects GMT as the time zone and the server is in the IST time zone, the report shows data from 0530 am, since this is equivalent to 00.00 of GMT.

3. **Contact Delivery Forecast** displays fresh contacts available for delivery under the Fresh column for each listed campaign. Under columns indicated by time in 15-minute intervals, the application shows the count of contacts that are scheduled to be delivered as per the configured Contact Selection Strategy (CSS).

4. Expand each **Campaign** to see the CSS-wise break up of contacts being delivered for each time interval. Contacts are counted only once against the first condition even if they satisfy multiple conditions.

Example, assume you upload a single contact that satisfies two conditions – Condition 1 and Condition 2 If this contact satisfies both conditions, the Delivery Forecast counts this contact against the first condition only. Even though this contact satisfies the second condition also, the count against the second condition is shown as zero.

## Contact Exclusion Forecast

**Contact Exclusion Forecast** displays a summarized forecast of the possible number of contacts that could be excluded from being dialed out in the next three hours, starting from the last accessed or refreshed time.

1. Navigate to **Alerts** > **Campaign Forecast** > **Contact Exclusion Forecast**.

2. Select the **Time Zone** for which you want the Contact Exclusion Forecast data. The application converts the datetime based on the time zone selected by the user and renders the Contact Exclusion Forecast data. This is an optional configuration. The property IsTimeZoneRequiredForFilter should be set to true in the Service web.config file to get Contact Exclusion Forecast result by time zone.

   Example, if the user selects GMT as the time zone and the server is in the IST time zone, the report shows data from 0530 am, since this is equivalent to 00.00 of GMT.

3. Select the **Campaign** to view campaign specific data.

4. Click **Export** to download the Contact Exclusion Forecast reports.

## Fields

| Fields | Description |
|---|---|
| Campaign Name | Name of the campaign. |
| Total Contacts | The count of total open contacts at the beginning of the day. These contacts include fresh and rescheduled ones. These numbers are incremented when new contacts are uploaded; and not decremented when contacts are dialed out / rescheduled / status changed from open. The configured prediction hours has no bearing on this number. |
| Open Contacts | The overall contacts that are available to be dialed out for the corresponding Campaign. These contacts include fresh and rescheduled ones. This column is split into the following: **Total** - Displays the total number of open contacts for the Campaign. The number changes dynamically - incremented when contacts are uploaded / rescheduled and decremented when dialed out / closed or status changed from open. **Uploaded Today** - Displays the number of open contacts that are uploaded during the current day for the Campaign. |

| | |
|---|---|
| Available Contacts | The number of open contacts that can be dialed out or the next three hours.<br><br>Note: The column header contains the duration configured in the Service component's web.config property ExclusionPredictionInHours. If the hours configured here is two, the header is displayed as Available Contacts for next 2 hours.<br><br>**Total** - Displays the total number of open contacts for the Campaign that are to be dialed out for the current day.<br><br>**Uploaded Today** - Displays the number of open contacts that are uploaded during the current day to be dialed out on the same day for the Campaign. |
| Contact Blocked | List blocked contacts. |
| State Law | Displays the number of contacts for the Campaign that are blocked by State Law. |
| Do Not Call | Displays the number of contacts for the Campaign that are blocked by DNC (Do Not Call). |
| National Do Not Call | Displays the number of contacts for the Campaign that are blocked by NDNC (National Do Not Call). |
| Delivered Contacts | List number of total delivered contacts |
| Contact Selection Strategy (CSS) | Displays the number of contacts for the Campaign that are blocked by CSS conditions. |
| Fresh | Displays the number of fresh contacts for the Campaign that are waiting to be dialed out for the current day. |
| Schedule | Displays the number of rescheduled contacts for the Campaign that are waiting to be dialed out for the current day. |
| Estimated Completion Time | This is the Estimated Completion Time for all the dialable contacts in the campaign to be dialed out. This is calculated based on past history and current day data of total records processed and total duration processed.<br><br>Notes:<br><br>ECT and completion percentage are not applicable for Shared list campaigns.<br><br>Campaigns having lists beyond the prediction hours are shown in exclusion report, only if in they are in executing state or are expected to be in the executing state in the prediction hours. |
| Completion Percentage | The percentage of contacts dialed out (from the campaign-specific total number of contacts uploaded) for the campaign. The formula is (Completed Contacts * 100) / Total Contacts. |

| | Total Contacts is calculated using the following formula: |
| --- | --- |
| | *TotalContacts = Count(Open) + Count(Closed) + Count(Other)* |

# Tools

The Tools menu includes the Call Recording module and the Purge and Archive module.

Call recordings allow users to search for and access the recordings of each connected call. For more information, <u>click here</u>.

The Purge and Archive utility helps users in automatically purging the tenant databases. This tool eliminates the need for tedious manual work associated with such activities. Over a period, as usage of the application increases, the size of the database increases exponentially. For more information, <u>click here</u>.

## Purge and Archive

Purge and Archive utility helps users remove the data files from the databases automatically. This tool helps avoid the tedious manual work that is involved in such activities. Purging a database removes the data you specify from the database. After the data is deleted, it cannot be recovered.

When usage of the application increases, the size of the database also exponentially increases. To keep this data size in check to avoid performance issues, it is imperative we have a robust data retention plan. Purge and Archive utility is a purge tool that helps you achieve the objectives of your data retention plan. Using the Purge and Archive utility, you can just purge the data off your databases or, additionally, archive the purged data.

You can purge and archive data files. If you select to archive the purged data, select from the following:

- **Archive on an Amazon S3 bucket or on a shared drive** - The data is stored as a Comma-Separated Value (CSV) file. The file-naming convention followed is <TableName>_<PurgeDate in YYYYMMDD format>. For example, AuditTrail_20210326.

- **Archive on another MS SQL database** - You have to first create a database on MS SQL and use this database name to configure the archive settings.

### Settings

1. Navigate to the **Settings** and make sure that the **Purge** is set to **On**. Users cannot turn this OFF.

2. Set the **Archive** switch to **OFF** if you do not want the purged data to be archived.

   **Note**: If you turn the Archive switch OFF, the utility removes the purged data permanently from the database. You will not be able to access purged data.

3. Select the appropriate **Archive Type**. For more information, see "Archive Type" on page 209.

4. Select a **Schedule** for the purge activity from **Daily**, **Weekly**, and **Monthly**.

   a. Daily - The application purges the database at the configured start and end times once daily.

      **Note**: If you choose the Daily schedule, complete the Excluded Days field - this is optional.

   b. Weekly - The application purges the database at the configured start and end times once a week. If you select this run type, select a Day of Week to purge the database.

   c. Monthly - The application configures the database at the configured time once a month. If you select this option, you can select End of Month to purge the data on the last calendar day of the month between the configured start and end times. If you want the purge to happen on a specific date every month, choose the Date option and select a date for the purge activity.

      **Note**: If you select the Date option and select any date that is not applicable for a specific month, the purge activity is skipped for that month. For example, if you choose 30 as the date, purge activity is skipped for February.

5. Select a **Start Time** for the purge activity.

6. Select an **End Time** for the purge activity. The purge activity ends at the configured end time, even if there are records pending purge. These residual records are taken up for purging at the next scheduled purge time.

7. Select the **Excluded Days**. Using the Excluded Days field, you can configure the days of the week when you do not want the application to perform the Purge (or Purge and Archive) activity. This helps retain the data for purge-excluded days. This is an optional field; you can select multiple days.

8. Click **Save**.

## Table Groups

Table Groups is the section where all the transactional tables (only those that can be purged) are listed. The Core and Reporting tables are listed in separate tabs. Available tables in both Core and Reporting section are listed by the purge utility. If any table / field is added / deleted in a future patch, the patch installer handles this - manual intervention is not required.

Change in data type (for example, from int to varchar) and field resize is not handled by the purge and archive utility. You have to manually run a script (in the Archive database) provided by the Services team - this script changes the data type before commencing the next scheduled purge activity.

Table group displays the following parameters:

| Field | Description |
| --- | --- |
| Table Name | Name of the table that is available for purge. The table icon before the table name is in |

| | orange if it is a user-defined table and gray if it is a system table. You cannot disable Purge for a system table - the purge process is mandatory as per your configuration. |
|---|---|
| Description | Description of the data stored in the table |
| Retention Days | Number of days to retain the data in the specific table. The purge and archive utility purges data older than the number of retention days configured here. For example, if you have configured 100 days, data older than 100 days is purged (and archived, if configured). The purged and archived data is not available for any use (reporting or others) once it is removed from the database table. |
| | If you configure 0 (zero) days as Retention, all records residing in the database at the configured purge window are removed from the database. The table group comes with a default retention days' value of 365 days. |
| Archive | If you have chosen to archive your data in the common Settings section, you can choose not to archive specific tables here. |
| | If you have chosen NOT to archive your data in the common Settings section, turning the Archive switch ON in this section will not archive the table data. |
| Purge | You have no option to turn off purge under the common Settings section. You can still choose not to purge data from certain tables. Turn the Purge switch OFF (for the specific table) for specific tables. This ensures data in this table is not purged even if older than the Retention Days defined. |
| Archive Retention Days | This is the number of days of retention of the archived data. This is different from the Retention Days in Sl. No. 3 above. For example, if you have mentioned 365 days' data to be retained, that data is retained. The Archive Retention Days retains this backed-up data for the number of days specified. |
| Archive Purge | Turn this switch ON if you desire to purge the 'archived' data after the Archive Retention |

| | Days. |
|---|---|
| Actions | It allows you to edit Retention Days, turn OFF or ON archiving and/or purging, change Archive Retention Days, and turn ON/OFF Archive Purge. Click Save in the Edit mode to save your changes or Cancel to revert the changes. |

## Process Monitoring

Process Monitoring section of the Purge & Archive utility shows the progress of the purge and archive activity.

| Field | Description |
|---|---|
| Type | Type of table being purged, that is, Core or Reporting |
| Activity Start Time | Start time for the purge and archive activity |
| Activity End Time | End time of the purge and archive activity |
| Status | Purge status

**Paused** indicates that the purge and archive activity is paused due to the configured end time being reached. This status also indicates that the purge and archive activity is not complete - there are residual records to be purged and archived. The activity starts afresh at the next configured start time, and purges the records that are older as per the configured Retention Days.

**Success** indicates all records are successfully purged (and archived, if configured).

**Failed** indicates that the purge or archive utility has failed. Refer the PurgeArchive component logs to troubleshoot. |
| Records Affected | Number of records purged (and archived, if configured) as part of this purge activity.

If the number of records in a table are very large, the purge and archive utility performs the activity batch wise, with each batch containing a pre-configured number of records at a time. This number is specified in the PurgeBatchSize property of the PurgeArchive web.config file. |
| **Status Details** | |

| | |
|---|---|
| In Progress | Assume there are 50,000 records in a table. The records are purged in 5 iterations of 10,000 each. Till the last iteration is complete and all the records are purged, the In Progress status is shown. |
| Success | If there are 50,000 records in a table, and all the records are purged (all iterations), then the status is Success. |
| Paused | A table contains 50,000 records and requires 5 iterations of 10,000 records each to be purged. The first three iterations are complete. At the configured end time, the purge activity is stopped when the fourth set is being purged. The status is marked as Paused. The residual 20,000 records are purged when the next purge activity commence time is reached. |
| Failure | A table contains 50,000 records, and is being purged in five iterations of 10,000 each. If the first iteration is a success, and the second iteration fails due to some reason (database error, for example), the purge activity is marked as Failure. Refer the logs and troubleshoot. |

## Purge Files Configuration

The Purge Files Configuration helps you configure the purge settings for archived files. The application adds the data to the various database tables and saves some files on a daily basis or at configured intervals to separate folders. These files can contain contact file upload data, contact file error data, and so on. These files can grow in number and size and occupy disk space, slowing the system down. This goes against the optimal data retention plan. Use the Purge Files Configuration to manage files and storage space optimally. Navigate to the Purge Files Configuration section to open the grid containing the configurations already being used.

For more information, see Purge File Configuration.

## Purge File Configuration

You can add the following settings:

- Purge Files
- Purge File Settings

**Add Purge Files**

The Purge Files feature allows you to configure locations where the purged data is stored such as a local drive, a shared drive, or an Amazon S3 bucket.

1. Enter a **Purge Folder Description**.
2. Enter a **Purge Folder Type**. The available options are **Local**, **S3**, and **Shared Drive**.

   a. Enter the path to the **Local** folder from where the files are to be purged.

   b. Select the **Amazon S3** if your files are stored in an Amazon S3 bucket. Select the **S3 Settings** from the dropdown. See Purge File Settings. Select the Archive S3 Settings checkbox if you want to save these settings to an archive. In the **S3 Path** field, select the S3 folder path or mention the S3 folder URL.

   c. Select the **Shared Drive** if your files are stored in a shared drive. If you select shared drive, select the **SharedDrive Settings** from the dropdown list. See Purge File Settings. Enable the **Archive Shared Drive Settings** checkbox if you want to save these settings to an archive. In the **Shared Drive Path** field, select the Shared Drive folder path.

   **Note**: When giving the path, do not include any slash/backslash at the beginning. For example, if you require your data to be archived in the Archive folder of the machine having IP address 172.20.3.74, give the IP address as 172.20.3.74 and the Path as Archive. If you are using a subfolder under Archive, specify the correct path - Archive\PurgeData.

   d. Select the **Google Cloud Storage** if your files are stored in Google cloud storage. If you select shared drive, select the **Google Cloud Storage Settings** from the dropdown list. See Purge File Settings. Enable the **Archive Google Drive Storage Settings** checkbox if you want to save these settings to an archive. In the **Bucket Path** field, select the bucket folder path.

3. Enable the **Subfolder Enable** checkbox if you want to purge the archived files in all the subfolders under the main folder.
4. Select or enter the number of **Retention Days**.
5. If you select to purge the archived files, select the **Purge Enable** checkbox.
6. Click **Save**.

**Add Purge File Settings**

The Purge File Settings configuration allows you specify all the access details (locations and credentials) about your file locations - Amazon S3 bucket or Shared Drive - in a common page. You can then refer to these settings in the Purge File page. This saves you the time taken to enter all the authentication details for each purge activity. All the settings configured are listed as you navigate to the page.

1.  Navigate to the **Add Purge File Settings** and enter the **Settings Name**.

2.  Select the appropriate **Setting Type**.

3.  If the Setting Type is **S3**, enter the AWS Access Key, AWS Secret Key, AWS Region End Point, KMS Key, and Server Side Encryption. Select KMS Encrypt if you want the data encrypted using AWS' KMS encryption.

4.  If the Setting Type is **Shared Drive**, enter the IP address, User ID, and Password.

5.  If the Setting Type is **Google Cloud Storage**, enter the Account Type, Private Key, and Client Email.

6.  Click **Save**.

**Edit Purge File or Purge File Settings**

1.  Select the Purge File or Purge File Settings and click **Edit** icon under the **Action** tab.

2.  Update the details and click **Save**.

**Delete Purge File or Purge File Settings**

1.  Select the Purge File or Purge File Settings and click **Delete** icon under the **Action** tab.

2.  Click **Ok** on the confirmation pop up.

## Archive Type

Campaign Manager offers the following archive types:

**Amazon S3 Bucket Archive Type**

1.  Navigate to the **Settings** tab and make sure that the **Purge** switch is set to On. Users cannot turn this OFF.

2.  Enable the **Archive** switch OFF if you do not want the purged data to be archived.

    **Note**: If you turn the Archive switch OFF, the utility removes the purged data permanently from the database. You will not be able to access purged data.

3.  Select the **Archive Type** as Amazon S3.

4.  Enter the **S3 URL** that stores your archived data. Create a separate folder on the Amazon S3 bucket for the archived data and configure that folder in the S3 URL field.

5.  Enter the **AWS Region End Point**. This is the region that your AWS S3 bucket is located in.

6.  Enter the **AWS Access Key**. This is the key to access your AWS S3 bucket. Access Keys are used to sign the requests you send to Amazon S3. AWS validates this key and allows access. You use access keys to sign API requests that you make to AWS.

7.  Enter the **Amazon AWS KMS Encrypt** (Key Management Service). You can set the value as true or false. If set as true, this encrypts data stored on the S3 bucket.

8.  Enter the **AWS Secret Key**. This is the secret key (like the password) for the AWS Access Key configured in item 5 above. The combination of an access key ID and a secret access key is required for authentication.

9.  Enter the **Server Side Encryption**. This is the encrypt/decrypt key, defining that the purged data is encrypted using the AWS' Key Management System (KMS) encryption.

10. Enter the **KMS Key**. This is the key to decrypt the data on S3 bucket.

**Shared Drive Archive Type**

1.  Select the **Archive Type** as **Shared Drive**.

2.  Enter the **IP** address or the **Host Name** of the device that stores your archived data.

3.  Enter the **User ID** of the user that accesses the above drive to store the data. This should be a combination of domain and username. For example, <domain>\UserID.

4.  Enter the Password for the user to access the shared drive.

5.  Enter the Path on the shared drive where your data is to be archived.

    **Note**: When giving the path, do not include any slash/backslash at the beginning. For example, if you require your data to be archived in the Archive folder of the machine having IP address 172.20.3.74, give the IP address as 172.20.3.74 and the Path as Archive. If you are using a subfolder under Archive, specify the correct path - Archive\PurgeData.

**Database Archive Type**

1.  Select the **Archive Type** as **Database**.

2.  Select an authentication type from the following:

    a.  **SQL Authentication**: This is a typical authentication used for various database systems, and comprises a username and a password. Obviously, an instance of SQL Server can have multiple user accounts (using SQL authentication) with different usernames and passwords. In

shared servers where different users should have access to different databases, SQL authentication is preferred. SQL Authentication is also required when a client (remote computer) connects to an instance of SQL server on a computer other than the one on which the client is running.

b. **Windows Authentication**: When you are accessing SQL server from the same computer. it is installed on, you are normally not asked to type in a username and password. With Windows Authentication, the SQL server service already knows that someone is logged in into the operating system with the authenticated credentials. The SQL server service uses these credentials to allow the user into its databases. Of course, this works as long as the client resides on the same computer as the SQL server, or as long as the connecting client matches the Windows credentials of the server. Windows Authentication is often used as a more convenient way to log in to a SQL server instance without typing a username and a password. When more users are involved, or remote connections are being established with the SQL Server, SQL Authentication should be used.

3. Enter the **IP Address** of the device that has the database that stores your archived data.

4. Enter the **Port Number** that communicates with the database that stores the archived data.

5. Enter the **Database** name. Create a database via SQL Studio to archive the purged data. Enter the database name in this field.

6. Enter the **User ID** and the **Password** of the user that accesses the database.


**Google Storage Type Archive Type**

1. Select the **Archive Type** as **Google Cloud Storage**.

2. Select an authentication type from the following:

a. **SQL Authentication**: This is a typical authentication used for various database systems, and comprises a username and a password. Obviously, an instance of SQL Server can have multiple user accounts (using SQL authentication) with different usernames and passwords. In shared servers where different users should have access to different databases, SQL authentication is preferred. SQL Authentication is also required when a client (remote computer) connects to an instance of SQL server on a computer other than the one on which the client is running.

b. **Windows Authentication**: When you are accessing SQL server from the same computer it is installed on, you are normally not asked to type in a username and password. With Windows Authentication, the SQL server service already knows that someone is logged in into the operating system with the authenticated credentials. The SQL server service uses these credentials to allow the user into its databases. Of course, this works as long as the client resides on the same computer as the SQL server, or as long as the connecting client matches the Windows credentials of the server. Windows Authentication is often used as a more convenient way to log in to a SQL server instance without typing a username and a password.

When more users are involved, or remote connections are being established with the SQL Server, SQL Authentication should be used.

3. Enter the **Archive Bucket Path**. This is the path on Google Cloud Storage where the application stores the archived data.

4. Enter the **Account Type**. This is the account type used to access the Google Cloud Storage. Use service_account as the default account type.

5. Enter the **Client Email**. This is the Email address of the Google Cloud Platform client account used to access the Google Cloud Storage.

6. Enter the **Private Key**. This is the Private Key of the Google Account to access the Google Cloud Storage to place the archived data.

**Fields**

| Fields | Description |
|---|---|
| S3 URL | URL that stores your archived data |
| AWS Region End Point | Region that your AWS S3 bucket is located in |
| AWS Access Key | This is the key to access your AWS S3 bucket. Access Keys are used to sign the requests you send to Amazon S3. AWS validates this key and allows access. You use access keys to sign API requests that you make to AWS. |
| Amazon AWS KMS Encrypt | Set this as true or false. If set as true, this encrypts data stored on the S3 bucket. |
| AWS Secret Key | This is the secret key (like the password) for the AWS Access Key configured in item 5 above. The combination of an access key ID and a secret access key is required for authentication. |
| Server Side Encryption | This is the encrypt/decrypt key, defining that the purged data is encrypted using the AWS' Key Management System (KMS) encryption. |
| KMS Key | This is the key to decrypt the data on S3 bucket |
| Schedule | Defines schedule for the purge activity. |
| Excluded Days | Using the Excluded Days field, you can configure the days of the week when you do not want the application to perform the Purge (or Purge and Archive) activity. This helps retain the data for purge-excluded days. This is an optional field; you can select multiple days. |
| IP address or Host Name | IP address or the Host Name of the device that stores your archived data |

| User ID | User ID of the user that accesses the above drive to store the data. This should be a combination of domain and username. |
|---|---|
| Password | Password for user to access the shared drive |
| Path | Path of shared drive where data needs to archive |
| SQL Authentication | This is a typical authentication used for various database systems, and comprises a username and a password. Obviously, an instance of SQL Server can have multiple user accounts (using SQL authentication) with different usernames and passwords. In shared servers where different users should have access to different databases, SQL authentication is preferred. SQL Authentication is also required when a client (remote computer) connects to an instance of SQL server on a computer other than the one on which the client is running. |
| Windows Authentication | When you are accessing SQL server from the same computer it is installed on, you are normally not asked to type in a username and password. With Windows Authentication, the SQL server service already knows that someone is logged in into the operating system with the authenticated credentials. The SQL server service uses these credentials to allow the user into its databases. Of course, this works as long as the client resides on the same computer as the SQL server, or as long as the connecting client matches the Windows credentials of the server. Windows Authentication is often used as a more convenient way to log in to a SQL server instance without typing a username and a password. When more users are involved, or remote connections are being established with the SQL Server, SQL Authentication should be used. |
| Archive Bucket Path | This is the path on Google Cloud Storage where the application stores the archived data. |
| Account Type | This is the account type used to access the Google Cloud Storage. Use service_account as the default account type. |
| Client Email | This is the Email address of the Google Cloud Platform client account used to access the Google Cloud Storage. 8.Enter the Private Key. |
| Private Key | This is the Private Key of the Google Account to access the Google Cloud Storage to place the archived data. |