Centcom 2006

Centcom Administrator Manual

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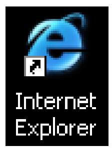
Introduction

The Centcom Web Administrator application is used to administer your Centcom system via the Internet. The Centcom Web Administrator application is used primarily to maintain the Centcom data. The Centcom Web Administrator application will allow you to:

- Manage agent setup and security
- Manage Team setup
- Manage Campaign setup and configuration
- Manage CRC's
- Manage the import of dial records into Campaigns.

Getting Started

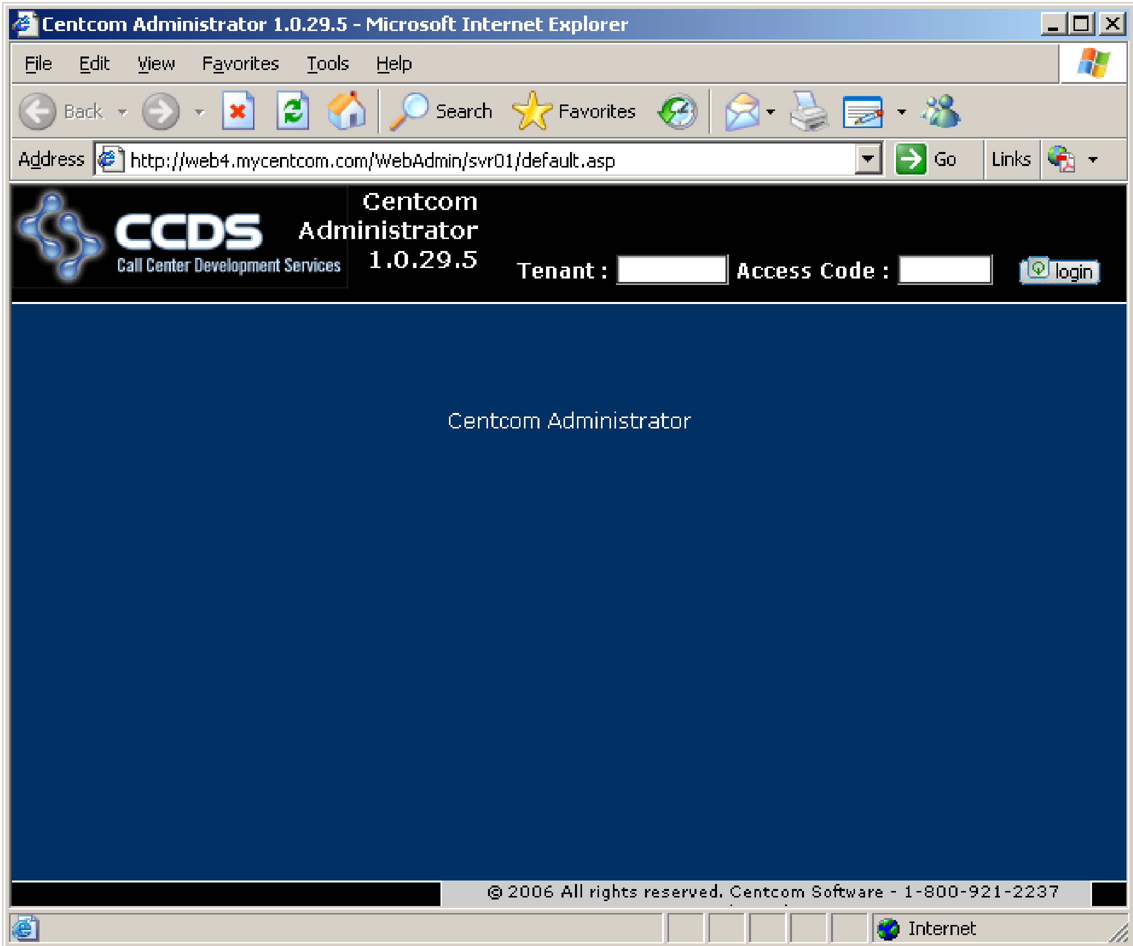
Use the following process to start the Centcom Web Administrator application:

1. From the Desktop, double-click on 

to launch the Internet Explorer.
2. Type the HTTP address of the Centcom Web Administrator application
(For example, http://web4.mycentcom.com/WebAdmin/svr01/default.asp)

3. Press <Enter> to access the Centcom Web Administrator site.

The Centcom Web Administrator area is displayed.



Now we need to log into the Centcom Web Administrator application.

4. Click in the text box under **Tenant:**.

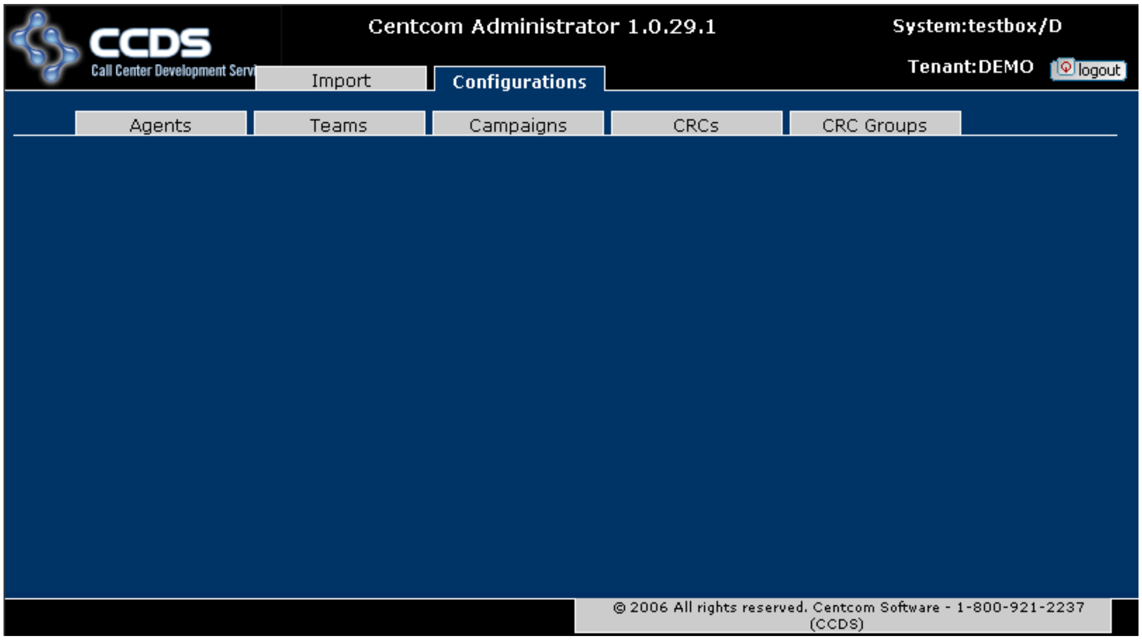
5. Type the first part of the **Tenant** name you would like to log in as (For example, the first part of the tenant name of **Ten**). A pick list of tenant names that have previously logged in is displayed.

6. Click on the **tenant name** you would like to log in as (For example, the tenant name of **tenant A1**).

7. Type in your **Access Code**.

8. Click on  to log into the Centcom Web Administrator application.

The Centcom Web Administrator application is displayed.



There are 7 areas within the Centcom Web Administrator application. Listed below is a brief description of each:

- **Import** – used to map data templates that will be used to import dial records into Campaigns for dialing purposes.
- **Configurations** – used to configure Agents, Teams, Campaigns, CRC's, and CRC Groups
- **Agents** – used to create all of the agents that will be using the Centcom system to accept inbound and make outbound calls.
- **Teams** – used to organize agents into groups.
- **Campaigns** – used to create the projects that will be run within the Centcom system.
- **CRC's** – used to create the CRC's (Call Result Codes) that will be used to disposition call results.
- **CRC Groups** – used to organize CRC's by groups for specific Campaigns.

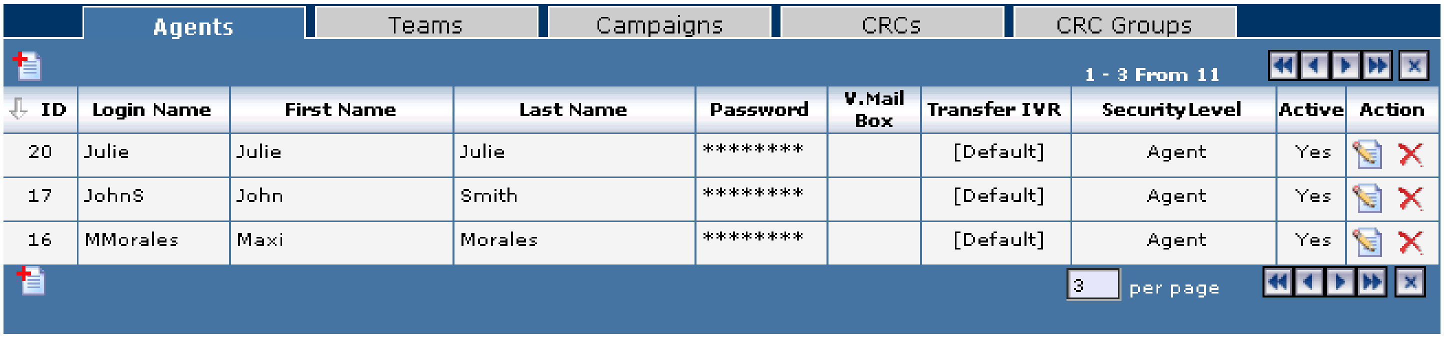
Creating New Agents

Let's add a new agent to the Centcom Web Administrator application.

1. If necessary, click on 

2. Click on 

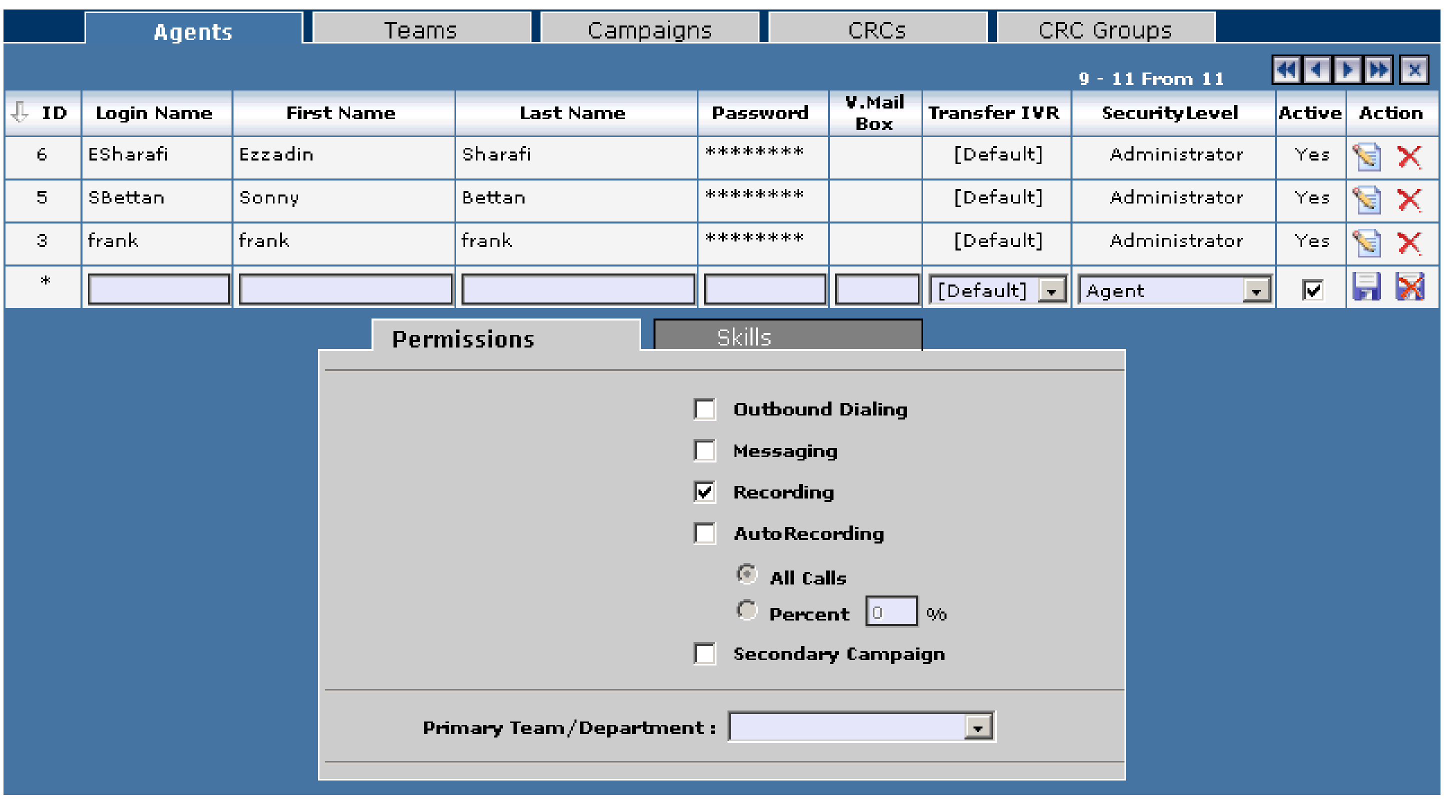
The Agents area is displayed.



Let's create a new agent.

3. Click on above the ID column to create a new agent.

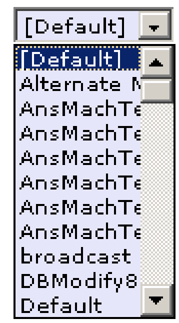
A new record row is displayed at the bottom of the Agents table with a dialog box for Permissions and Skills settings



4. Enter the new agent information.

Use the following table as a reference for completing the new agent information:

Feature:	**Description:**
Login Name	Identifies a user in the Agent application. Is usually created as a combination of the agent last name and first name (For example, jjones for Jerry Jones).
First Name	The first name of the new agent would be entered here.
Last Name	The last name of the new agent would be entered here.
Password	The password can be alpha, numeric, or a combination of both. The password must be a minimum of three 3 characters with no more than a maximum of fifteen 15 characters.
V.Mail Box	Voice mailboxes would need to be indicated only if you have the Centcom Voice Mail System installed with your suite of Centcom products. This field would be explained in further detail with the documentation you receive with the Centcom Voice Mail System.
Transfer IVR	Indicates which IVR Routine will be initiated when this agent does a transfer to an IVR Routine (would be indicated only if you are utilizing IVR Routines). The Transfer IVR would be indicated by clicking on ▼ to display the Transfer IVR List. Then, clicking on the desired Transfer IVR routine (For example, the Transfer IVR routine of AgentBusy).



Security Level

This area is used to indicate the security permissions and security level of access that will be available to this particular individual in the Agent application.

Choose one of the following security levels:

Denied Access – Prevents an agent from logging into the Agent application.

Agent – All of the Agent application functions will be available with the exception of monitoring, coaching, and recording other agents. In addition, the agent will not be able to change any of their settings within the Agent application.

Supervisor – All of the Agent application functions will be available including monitoring, coaching, and recording of agents. However, the supervisor will not be able to change any of the settings within the Agent application.

Administrator – All of the Agent application functions will be available including monitoring, coaching, and recording of agents. In addition, the administrator will be able to change all of the settings within the Agent application. The settings would have to be modified at each individual agent station since they are PC specific.

This security level controls the rights and privileges an agent will have when they log into the Agent application.

The Security Level would be indicated by clicking on ▼ to display the Security Level List. Then, clicking on the desired Security Level (For example, the Security Level of **Supervisor**).

Active Used to activate or deactivate an agent. If there is a "Yes", the agent will be displayed in the Active Agents view of the Administrator application and the list of agents in the Supervisor application. If there is a "No", the agent would only be displayed in the Inactive Agents view of the Administrator application.

NOTE: Terminated agents should be made Inactive and not deleted from the agents list. This will allow for statistical reporting even after the agent is gone.

Action The icons available in the Action column are used to edit an existing agent, delete an existing agent, or save a new/modified agent.

NOTE: Because the Centcom application was written in SQL (Structured Query Language), any spaces in **Login Name** or any of the other main fields should be represented with an underscore (_) instead of a space or any other character (For example, the **Login Name:** of **j jones** would be inserted as **j_jones**). This would hold true throughout this documentation.

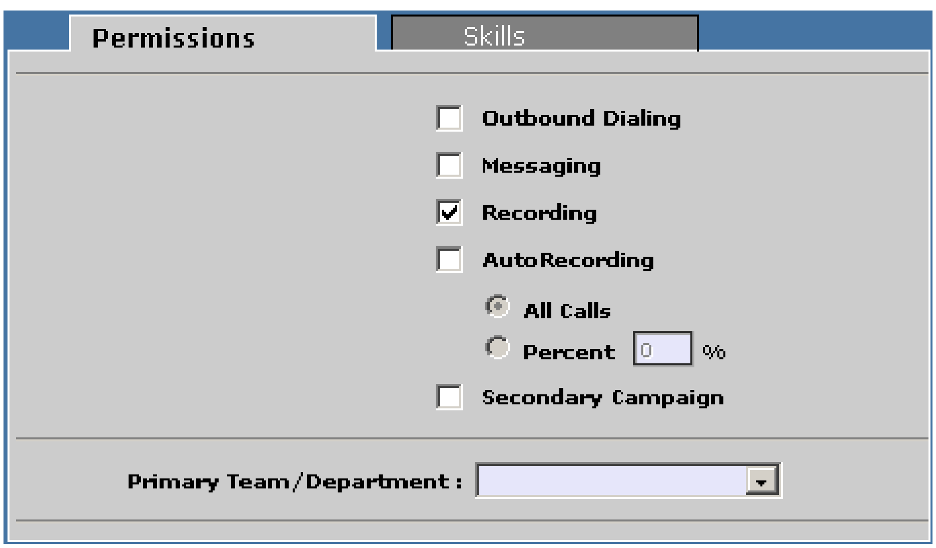
5. Click on  in the Action column of the new agent row to save and create the new agent.

NOTE: You may want to consider keeping a master list of passwords since they only display as asterisks (*****) in the Security area. If you should ever forget a password, just change it in the **Password** column and save the new agent settings.

Permissions Tab

1. If necessary, click on Permissions to display the Permissions area below the Agents table.

The Permissions area is displayed as follows:



The Permissions area is used to indicate the type of permissions an agent will have within Campaigns, as well as the primary team or department they will be assigned to.

Use the following table as a reference for completing the Permissions information of an agent:

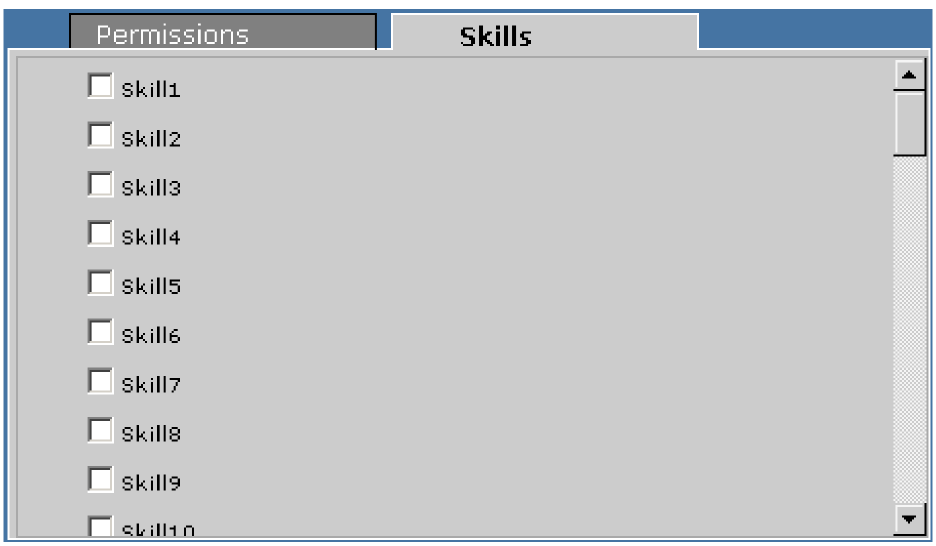
Feature:	Description:
Permissions	This area is used to indicate the various functions within the Agent application an agent will have access to.
Outbound Dialing	If checked, will allow an agent to make manual calls.
Messaging	If checked, will allow an agent to initiate text messages (IM – Instant Messaging) with other agents and/or supervisors.
Recording	If checked, will allow an agent to start and stop the recording of conversations.
Auto Recording	If checked, will automatically record conversations for a designated amount of time.
All Calls	Would automatically record all calls
Percent	Would automatically record a designated percentage of calls.
Secondary Campaign	Would allow an agent to simultaneously log into another Campaign.
Primary Team/Department	The main team or department an agent works in would be indicated here.

Skills Tab

1. Click on 

to display the Skills area below the Agents table.

The Skills area is displayed as follows:



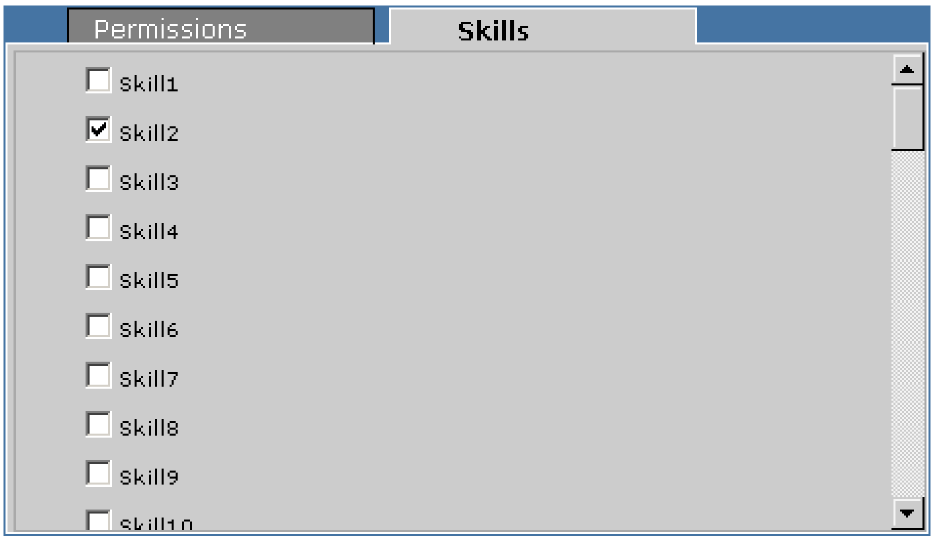
The Skills area is used with Centcom systems that are enabled for prioritizing inbound calling features. The incoming calls are routed through an IVR Routine. An IVR Routine is a series of commands that have been created using the Centcom IVR Maker utility to route a caller without human intervention (For example, press 1 for English, press 2 for Spanish). Built into the IVR Routine would be skills (For example, Skill1 for English and Skill2 for Spanish). When a caller presses 1 their call would be routed to an agent that has been assigned Skill1. When a caller presses 2 their call would be routed to an agent that has been assigned Skill2.

Assigning Skill Sets

Check all skills that pertain to each agent. If you are using skills in IVR Routines, you must select at least one skill for each agent (even if an agent has no skills, give them at least a Skill1). If you are not using skills in IVR Routines, you will not need to select any skills.

Let's indicate the skill set of the agent as being Spanish. When a caller is listening to an IVR Routine that indicates "Press 2 for Spanish", this agent will be part of the pool of agents the caller will be transferred to if they should actually press "2" for Spanish.

1. Click on **Skill2** to insert a checkmark.



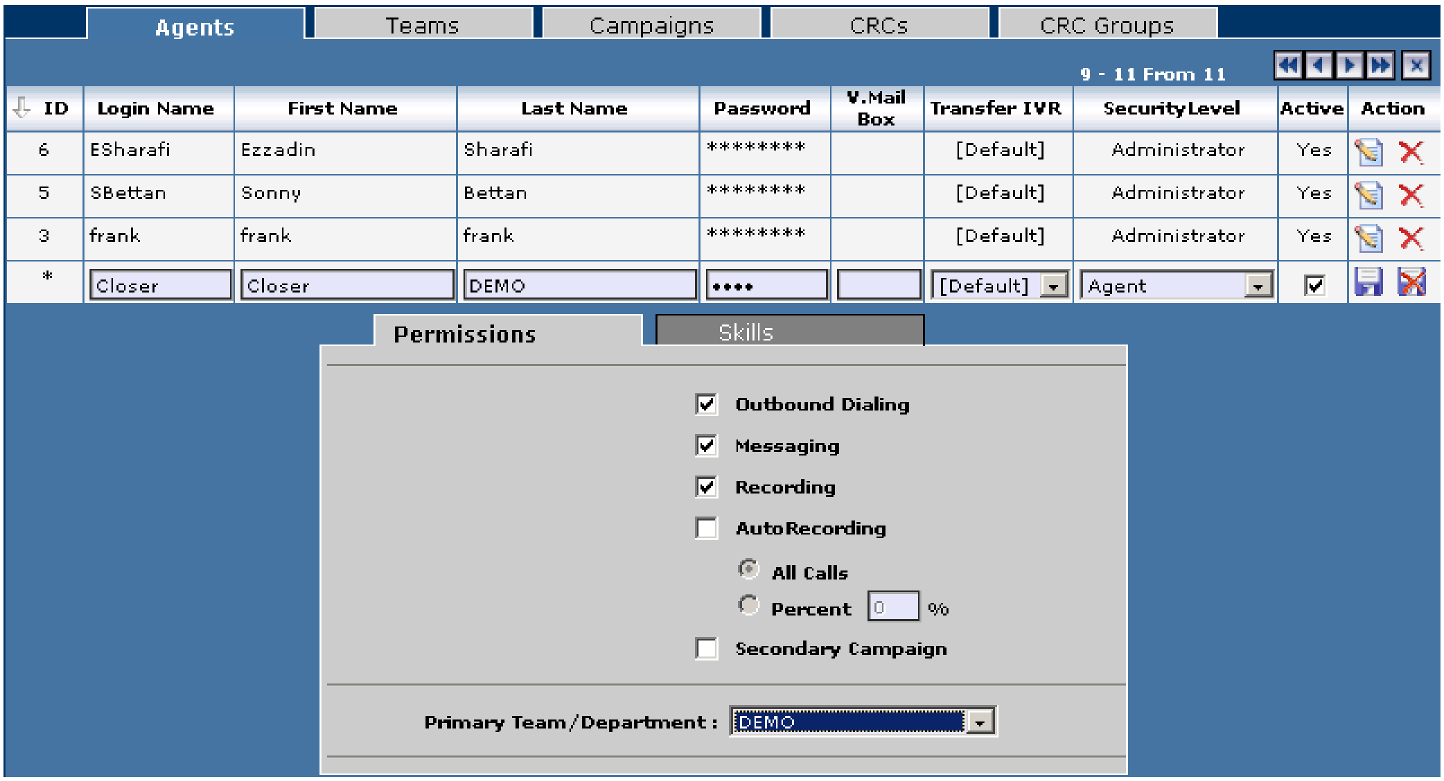
2. Click on in the Action column of the new agent row to save any changes that were made in the Permissions and Skills areas..

Changing Existing Agent Information

To change the settings of an existing agent:

1. Click on at the end of the agent row you would like to modify (For example, the agent of **Demo, Closer**).

The agent row to be modified is expanded with the Permissions and Skills area displayed:



2. Make any necessary modifications to the agent row.

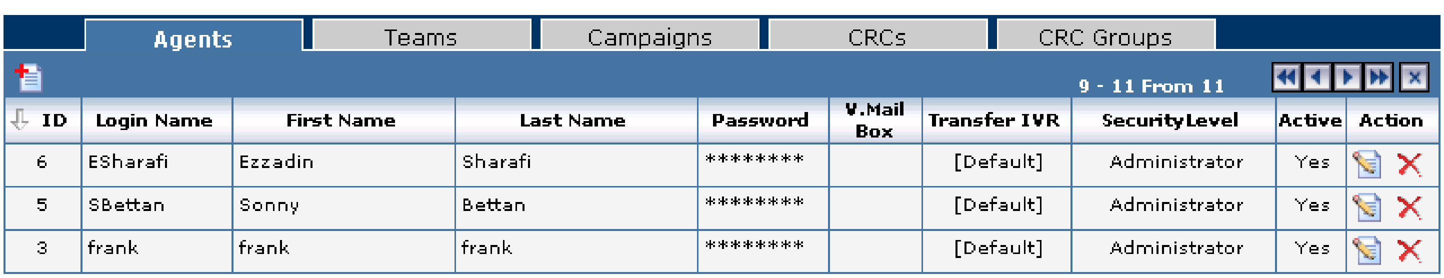
3. When you are finished making changes to the agent, click on to save all of your modifications.

Deleting Agents

To delete an agent:

1. Click on at the end of the agent row you would like to delete (For example, the agent of **Demo, Closer**).

2. Click on OK to confirm the deletion.



Creating New Teams

You will need to add agents to teams in order to have functional agents. Teams are a collection of Campaigns and agents.

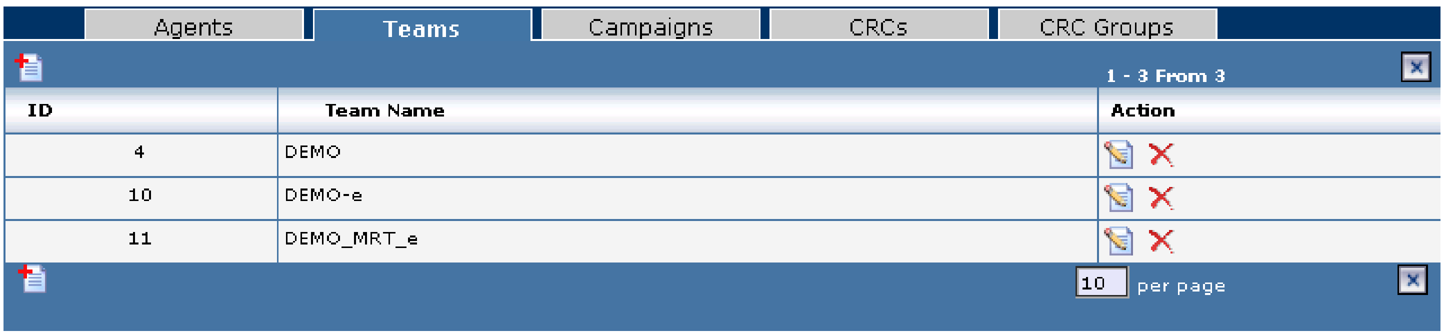
NOTE: If a Campaign and an agent are not in the same team, the agent will not be able to log into the Campaign.

First, we need to display the Teams area.

1. If necessary, click on Configurations

2. Click on Teams

The Teams area is displayed:



ID	Team Name	Action
4	DEMO	
10	DEMO-e	
11	DEMO_MRT_e	

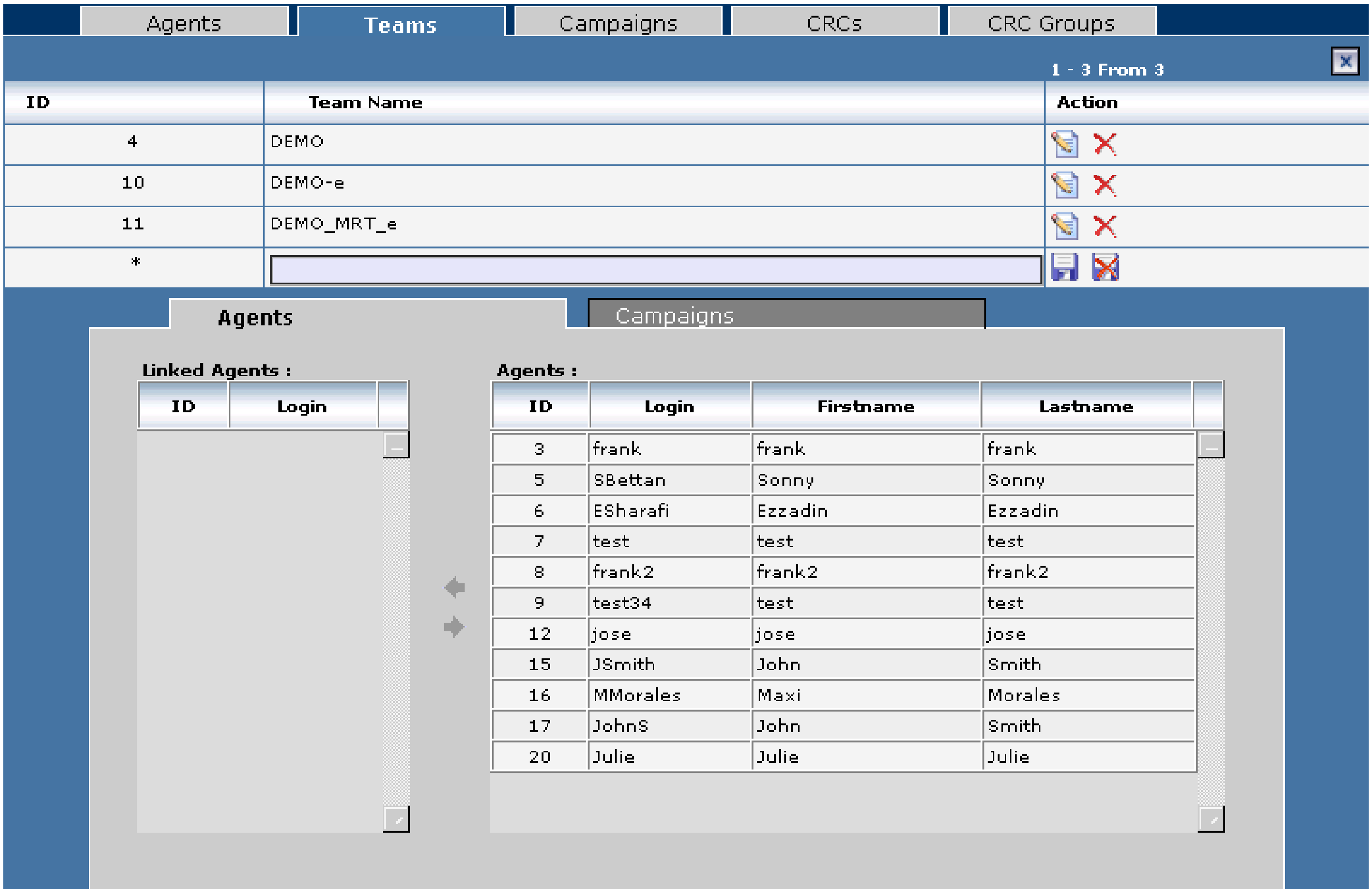
NOTE: The agents and Campaigns will need to be in place before you can create the teams you want to store them in.

The teams you set up could be equivalent to the different Centcom applications (a team of agents, a team of supervisors, or a team of administrators). Teams can also be set up to match the different groups (departments) of your call center (a team of appointment setters, a team of closers, etc).

Let’s create a new team.

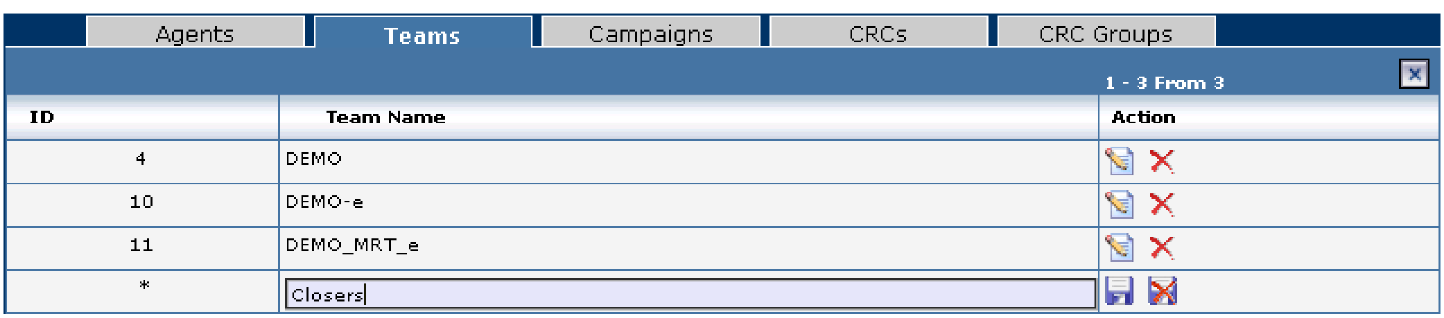
3. Click on above the ID column to create a new team.

A new record row is displayed at the bottom of the Teams table with a dialog box for Agents and Campaigns settings.



4. Click in the text box of the **Team Name** column.

5. Type the **Team Name** (For example, the Team Name of **Closers**).



6. Click on in the Action column of the new team row to save and create the new team.

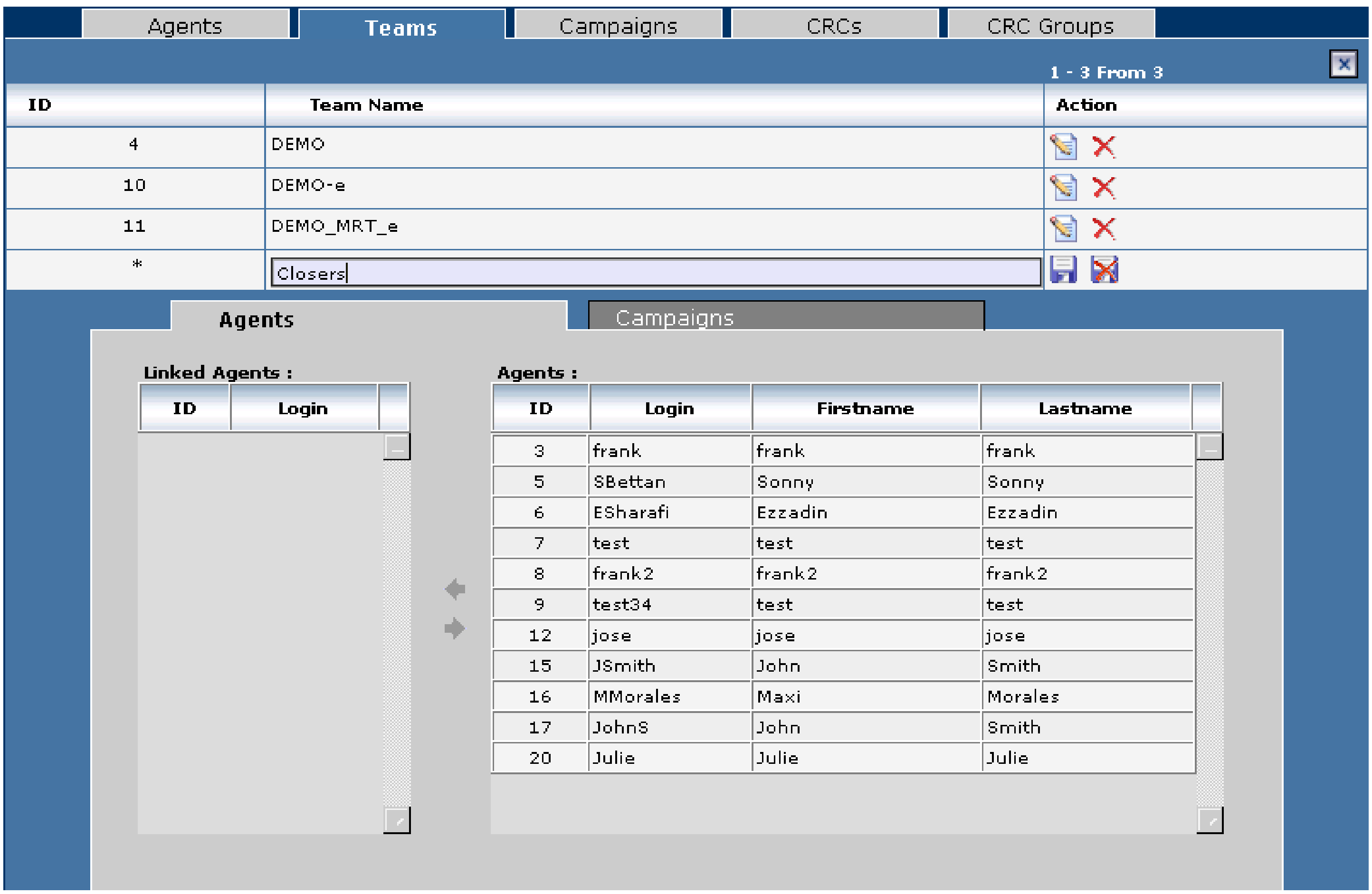
Assigning Agents to Teams

Now that the team has been created, it's time to add the agent(s) you want to include in the team.

To add agents to a team:

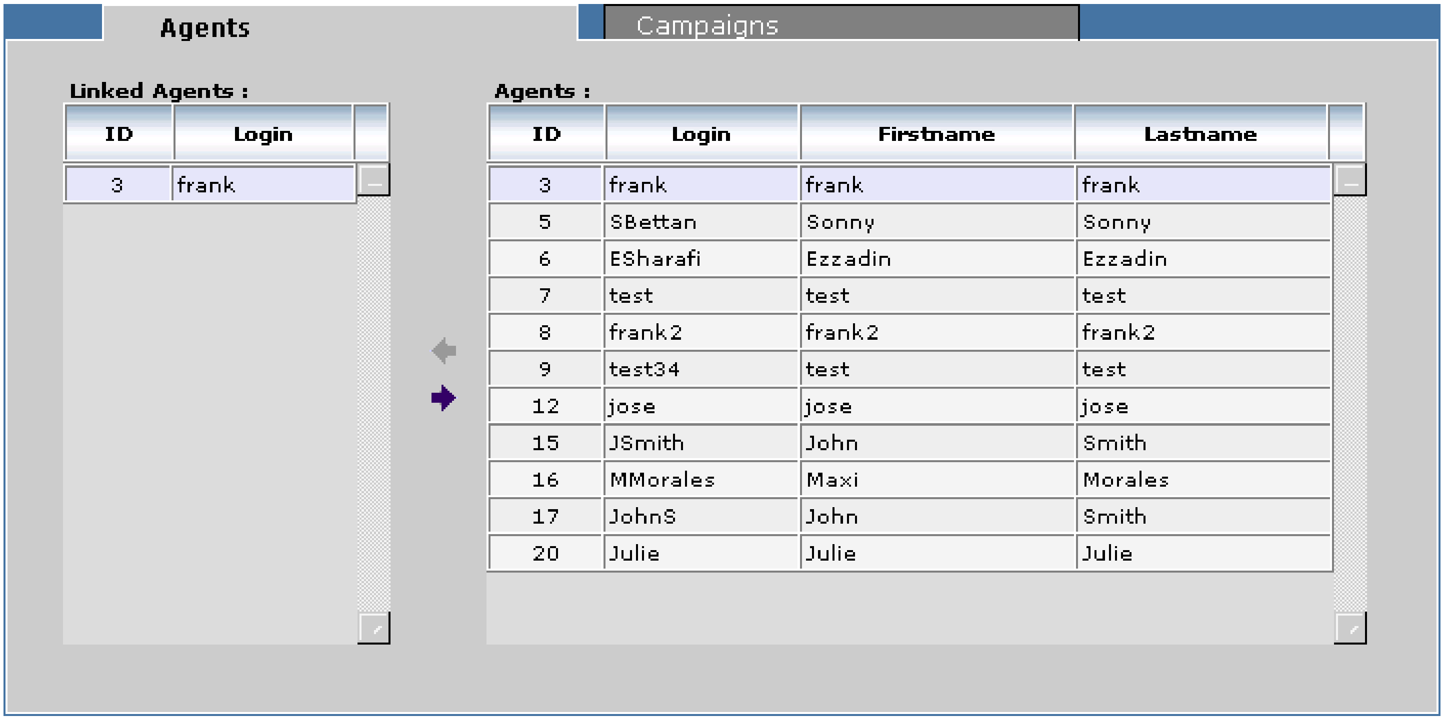
1. Click on  at the end of the team row you would like to modify (For example, the team of **Closers**).

The team row to be modified is expanded with the Agents and Campaigns area displayed.



2. Double-click on an **agent** in the **Agents:** list that you would like to add to the **Linked Agents:** area (For example, the agent login name of **Closer**).

The agent has been added to the Linked Agents: area.



ID	Login
3	frank

ID	Login	Firstname	Lastname
3	frank	frank	frank
5	SBettan	Sonny	Sonny
6	ESharafi	Ezzadin	Ezzadin
7	test	test	test
8	frank2	frank2	frank2
9	test34	test	test
12	jose	jose	jose
15	JSmith	John	Smith
16	MMorales	Maxi	Morales
17	JohnS	John	Smith
20	Julie	Julie	Julie

NOTE: The arrows that are located between the Linked Agents: and Agents: lists can also be used to move agents back and forth (you would need to click on the row to move before using the arrows). The same holds true for the Campaigns area in the next section.

3. When you have finished adding agents to the team, click on to save the **Linked Agents:** area.

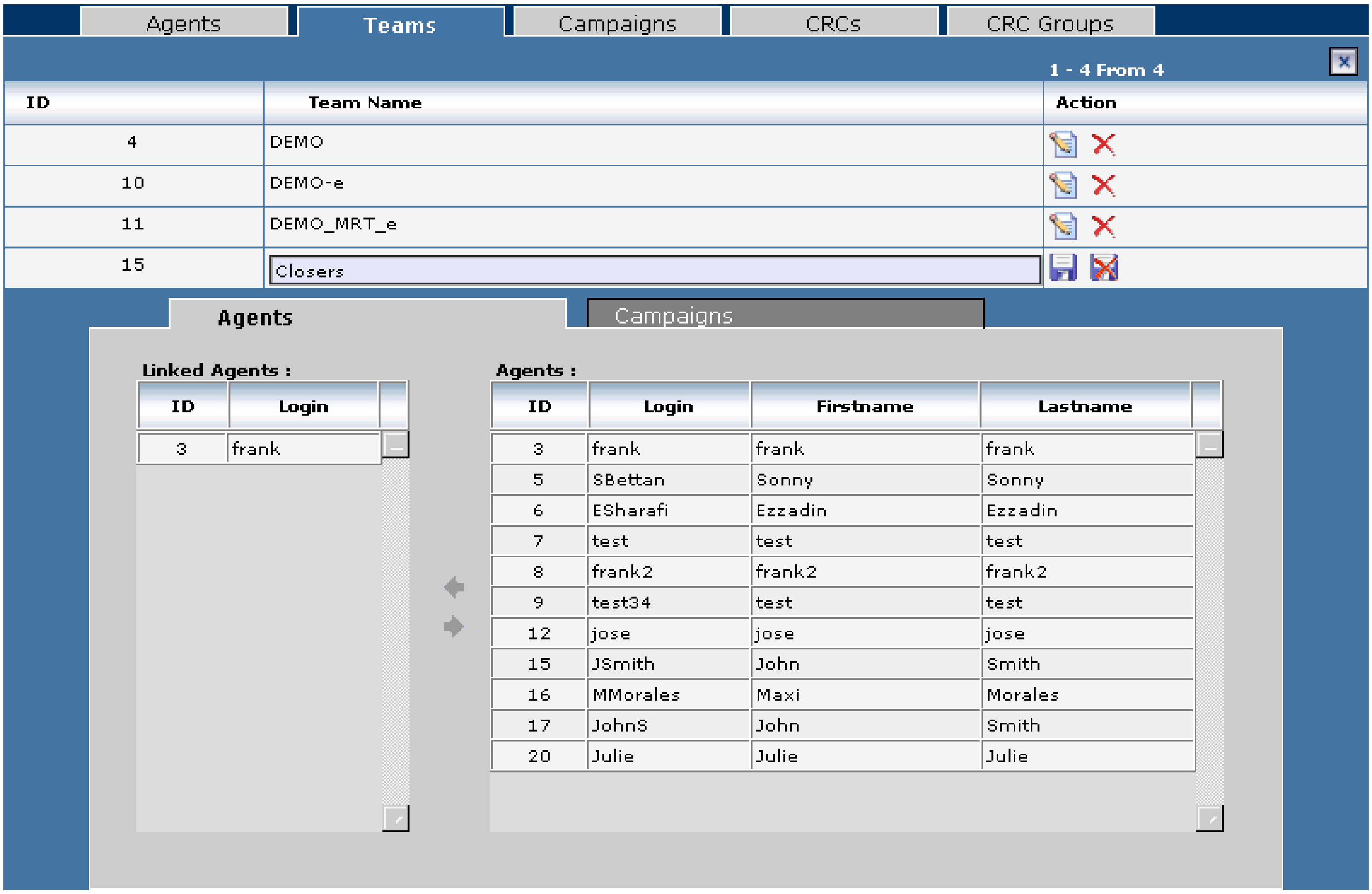
NOTE: Agents can be removed from a team by double-clicking on the agent in the Linked Agents: area which would move it back to the Agents: list.

Assigning Campaigns to Teams

Now that all of the agents have been added to the team, it's time to add the Campaign(s) you want to include in the team.

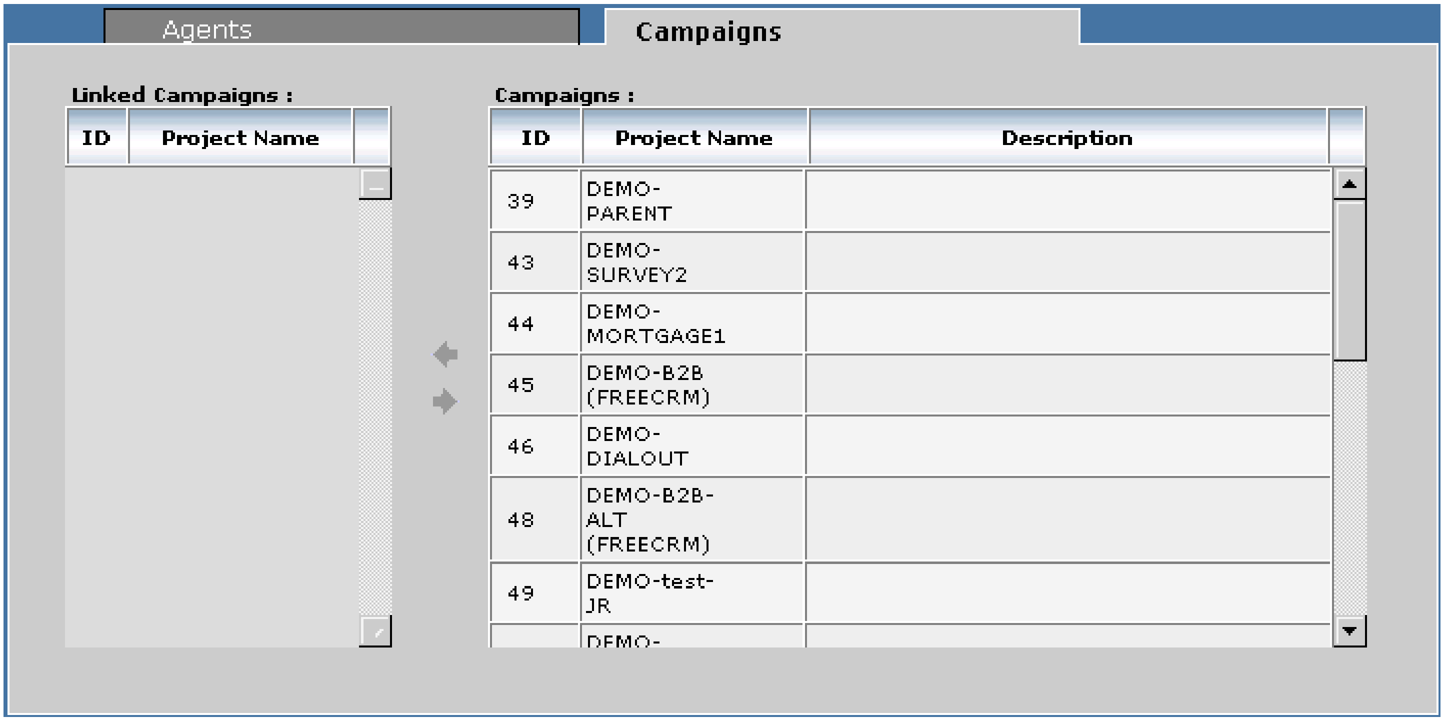
1. Click on at the end of the team row you would like to modify (For example, the team of **Closers**).

The team row to be modified is expanded with the Agents and Campaigns area displayed:



2. Click on Campaigns to display the Campaigns area.

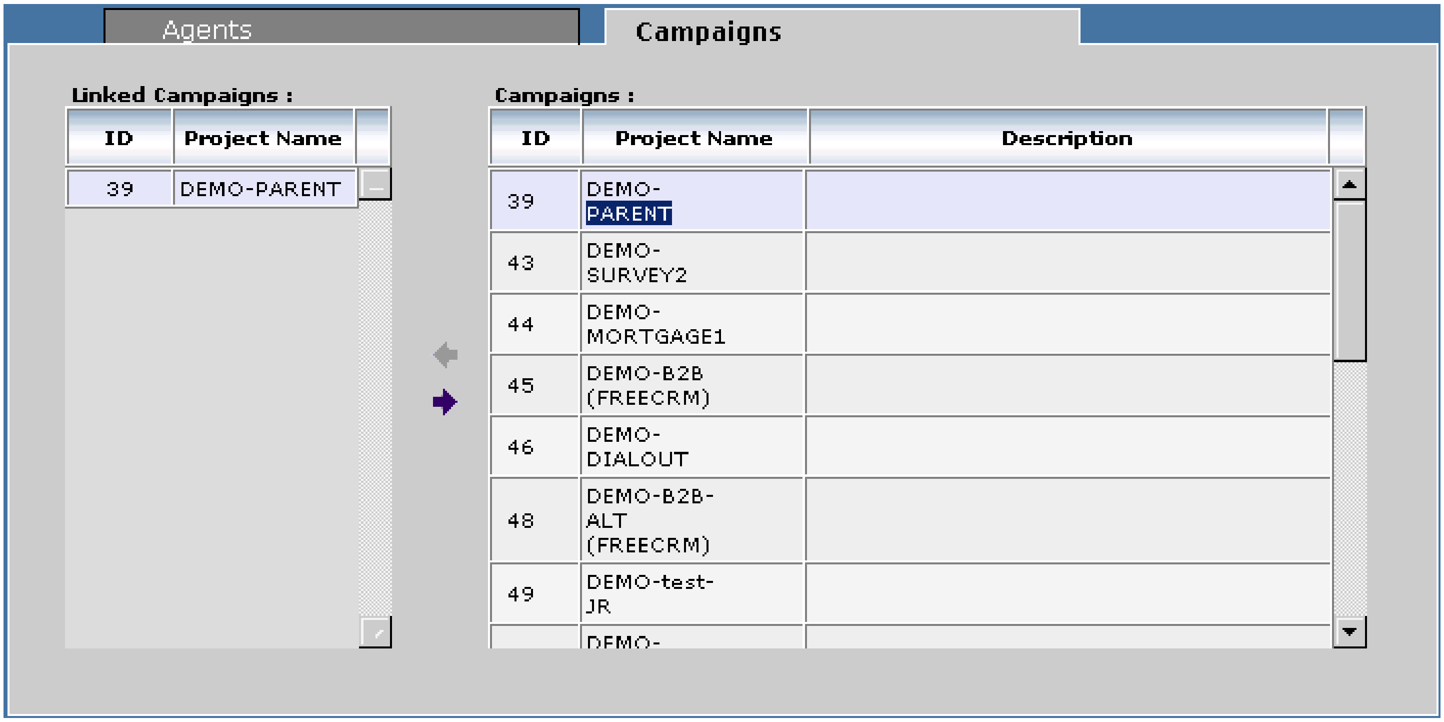
The Campaigns area is displayed:



NOTE: The Campaigns that are displayed in the Campaigns: list were created in the Campaigns tab of the Configurations area (the process of creating Campaigns will be discussed later in this chapter).

3. Double-click on a Campaign in the Campaigns: list you would like to add to the Linked Campaigns: area (For example, the Campaign of DEMO-PARENT).

The Campaign has been added to the Linked Campaigns: area.



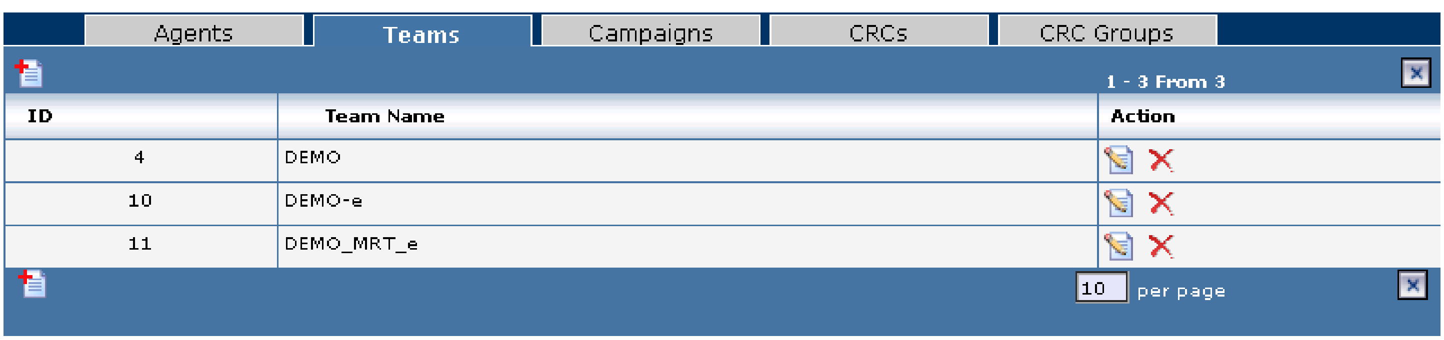
NOTE: Campaigns can be removed from a team by double-clicking on the Campaign in the Linked Campaigns: area which would move it back to the Campaigns: list.

4. When you have finished adding Campaigns to the team, click on to save the **Linked Campaigns:** area.

Deleting Teams

To delete a team:

1. Click on at the end of the existing team row you would like to delete (For example, the team of **Closers**).



2. Click on OK to confirm the deletion.

Creating a New Campaign

A Campaign is a project that is created to control the dialing of records (phone numbers and their associated information). These dialing records contain subject specific information (telemarketing leads, collections contacts, funding raising leads, etc.) that will be used by agents to make calls. The settings of each Campaign are modified to handle all of the Centcom software components that are going to be associated with that Campaign (For example, a script could be used to prompt agents through each call. This script could have been created using the Centcom Agent Script Builder component. Then, the script would be introduced to the project in the settings of the Campaign).

The Campaigns area will allow you to:

- Manage Campaign setup and configuration
- Manage the types of Campaigns
- Manage how IVR Routines and Scripts should be handled within a Campaign
- Manage dialer behavior within a Campaign

Let's create a new Campaign.

1. If necessary, click on Configurations

2. Click on Campaigns

The Campaigns area is displayed:

Agents | Teams | Campaigns | CRCs | CRC Groups

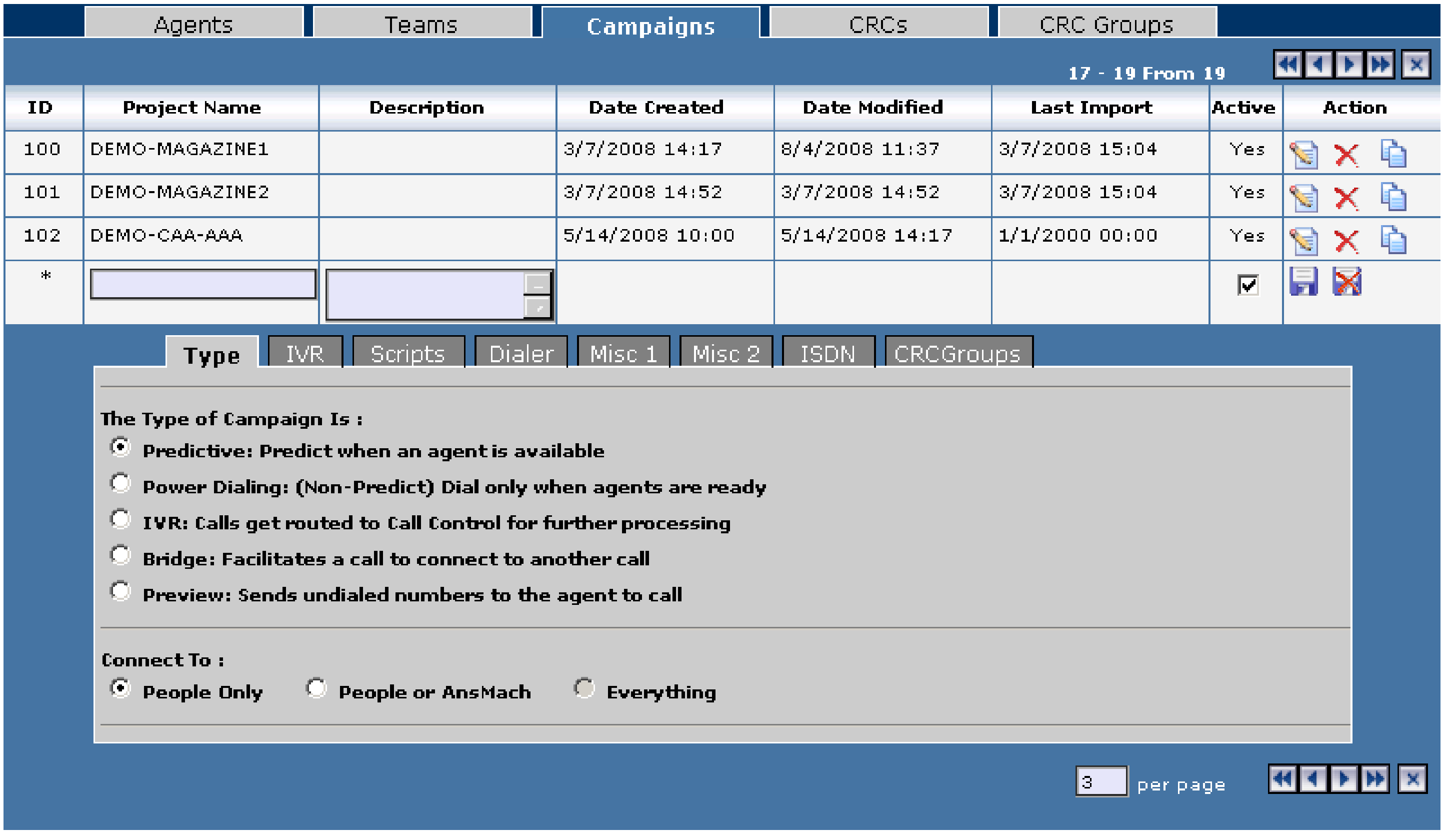
1 - 10 From 19

ID	Project Name	Description	Date Created	Date Modified	Last Import	Active	Action
39	DEMO-PARENT		9/14/2006 17:57	10/29/2008 14:34	1/1/2000 00:00	Yes	
43	DEMO-SURVEY2		9/14/2006 18:04	7/31/2008 11:01	2/22/2008 10:17	Yes	
44	DEMO-MORTGAGE1		9/14/2006 18:10	7/14/2008 15:32	2/22/2008 10:15	Yes	
45	DEMO-B2B (FREECRM)		9/14/2006 18:17	7/3/2007 14:41	9/15/2006 11:28	Yes	
46	DEMO-DIALOUT		9/14/2006 18:50	2/19/2007 17:01	1/1/2000 00:00	Yes	
48	DEMO-B2B-ALT (FREECRM)		10/3/2006 13:00	3/29/2007 14:21	10/3/2006 13:07	Yes	
49	DEMO-test-JR		12/7/2006 12:15	12/8/2006 13:26	9/14/2007 11:43	No	
51	DEMO-LEADS360		1/4/2007 18:13	8/8/2007 14:43	1/1/2000 00:00	Yes	
56	DEMO-RFR		1/16/2007 13:41	11/1/2007 16:47	1/16/2007 13:44	No	
60	DEMO-SURVEY1		5/22/2007 10:36	7/16/2008 11:47	1/1/2000 00:00	Yes	

10 per page

3. Click on above the ID column to create a new Campaign.

A new record row is displayed at the bottom of the Campaigns table with a dialog box for Type, IVR, Scripts, Dialer, Misc 1, Misc 2, ISDN, and CRC Groups settings.



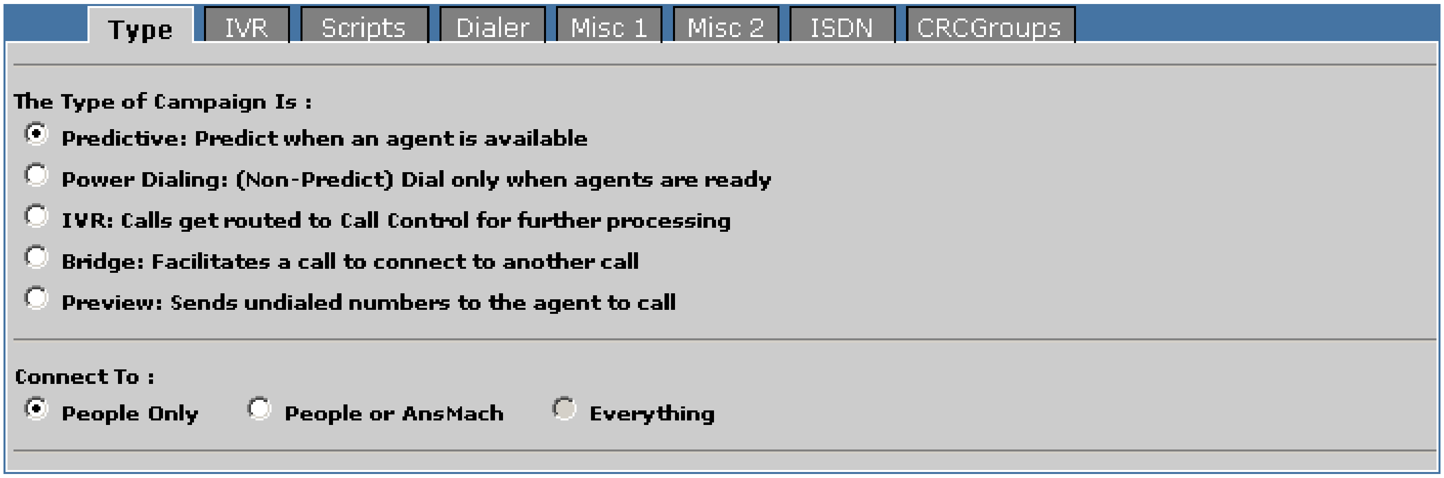
Use the following table as a reference for completing the new Campaign information:

Feature:	**Description:**
Project Name	What you would like to call the Campaign (For example, the Campaign name of **Newspaper_ColdCalls** could be used for a project that is going to call potential newspaper subscribers for the first time).
Description	Would be used to describe in more detail the intended purpose of the Campaign. (For example, To make the initial contact with potential Newspaper Subscribers).
Date Created	(Display purposes only) indicates when the Campaign was first created.
Date Modified	(Display purposes only) indicates when the Campaign was last modified.
Last Import	(Display purposes only) indicates the last time dial records were imported into the Campaign.
Active	Used to activate or deactivate a Campaign. If there is a "Yes", the Campaign will be displayed in the Active Campaigns view of the Administrator application and the list of Campaigns in the Supervisor application. If there is a "No", the Campaign would only be displayed in the Inactive Campaigns view of the Administrator application. **NOTE:** Campaigns that are no longer being used should be made Inactive and not deleted from the Campaigns list. This will allow for statistical reporting even after the Campaign has been retired.
Action	The icons available in the Action column are used to edit an existing Campaign, delete an existing Campaign, duplicate an existing Campaign or save a new/modified Campaign.

NOTE: The ID: number (displayed in the ID column of the Campaigns table) is stored in the Centcom database as a ProjectID not as a CampaignID. This would be very important if you should ever need to locate or manipulate Campaign information in the Centcom database.

Type Tab

The Type area is used to indicate the type of Campaign you would like to run, as well as the type of contacts the Campaign should be connecting to.



Use the following table as a reference for completing the Type area:

Feature:	**Description:**
Predictive:	This type of Campaign will predict when agents are available to take the next call based on activity (hold times, length of calls, etc.) that is analyzed by algorithms. The dialer will dial numbers even if all of the agents are busy. (8 to 10 agents or more to run efficiently).
Power Dialing:	This type of Campaign will dial call records only when agents are ready to take the next call. This type of Campaign would be considered (non-predictive – disables predictive dialing). Useful for small groups of agents or when it is important to minimize the number of dropped calls. (8 agents or less). This is a slower dialing Campaign that tends to have less dropped calls.
IVR:	This type of Campaign would be based on IVR Routines. An IVR Routine is a series of commands that have been created using the Centcom IVR Maker utility to route a caller without human intervention (For example, press 1 for English, press 2 for Spanish). Does not depend on any agents. Instead, the system will dial when a line is free and routes connected calls to the Centcom Call Control application for IVR handling (playing messages, prompting for digits, etc.).
Bridge:	Is a special IVR Routine type of Campaign used to facilitate the connecting of two calls together. An IVR routine will add a dialing record to the bridge Campaign, then upon connection, connect the original call with the bridged call. (For example, inbound calls that need to be connected to a PBX.)
Preview:	This type of Campaign would allow agents to preview the call record before a call is made.
People Only	Will connect to people only.
People or AnsMach	Will connect to people or answering machines.
Everything	The only type of Campaign that connects to everything is a Bridge Campaign.

IVR Tab

1. Click on IVR

The IVR area is displayed:

The IVR area is used to indicate how the IVR Routine will handle inbound versus outbound calls, answering machine routines, and specific IVR Routines based on call types.

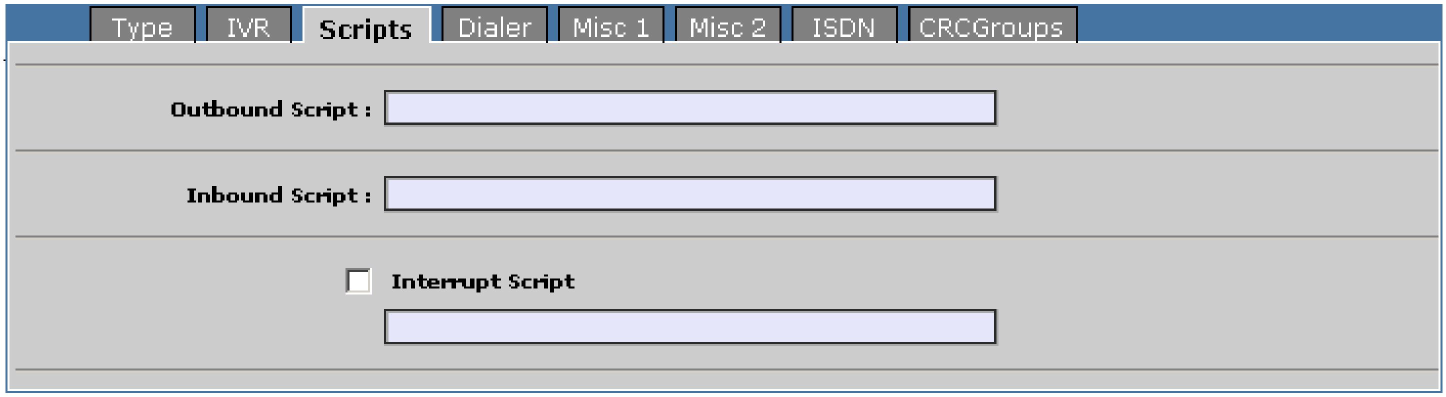
Use the following table as a reference for completing the IVR area:

Feature:	**Description:**
Will Handle:	The Campaign will handle the following types of calls: - Inbound Calls - Outbound Calls - Blended (a blending of Inbound and Outbound calls)
Do AM Routine	The answering machine IVR Routine: Every – Will run every time an answering machine is detected for the same dial record. First – Will run only the first time an answering machine is detected for the same dial record. Last – Will run only the last time an answering machine is detected for the same dial record.
People:	Click on and indicate the IVR Routine that should run when the dialer connects to a person.
AnsMach:	Click on and indicate the IVR Routine that should run when the dialer connects to an answering machine.
On Hold:	Click on and indicate the IVR Routine that should run when a call is placed on hold.
AgntXfer:	Click on and indicate the IVR Routine that should run when a call is transferred directly to an agent while waiting to be answered.
Terminate	Click on and indicate the IVR Routine (usually one that updates a database) that should run after the call has been terminated.
Dropped	Click on and indicate the IVR Routine that should run just before dropping a call (as required by FTC regulations).

Scripts Tab

1. Click on 

The Scripts area is displayed:



The Scripts area is used to indicate if a script should be used in the Agent application to prompt agents through their calls.

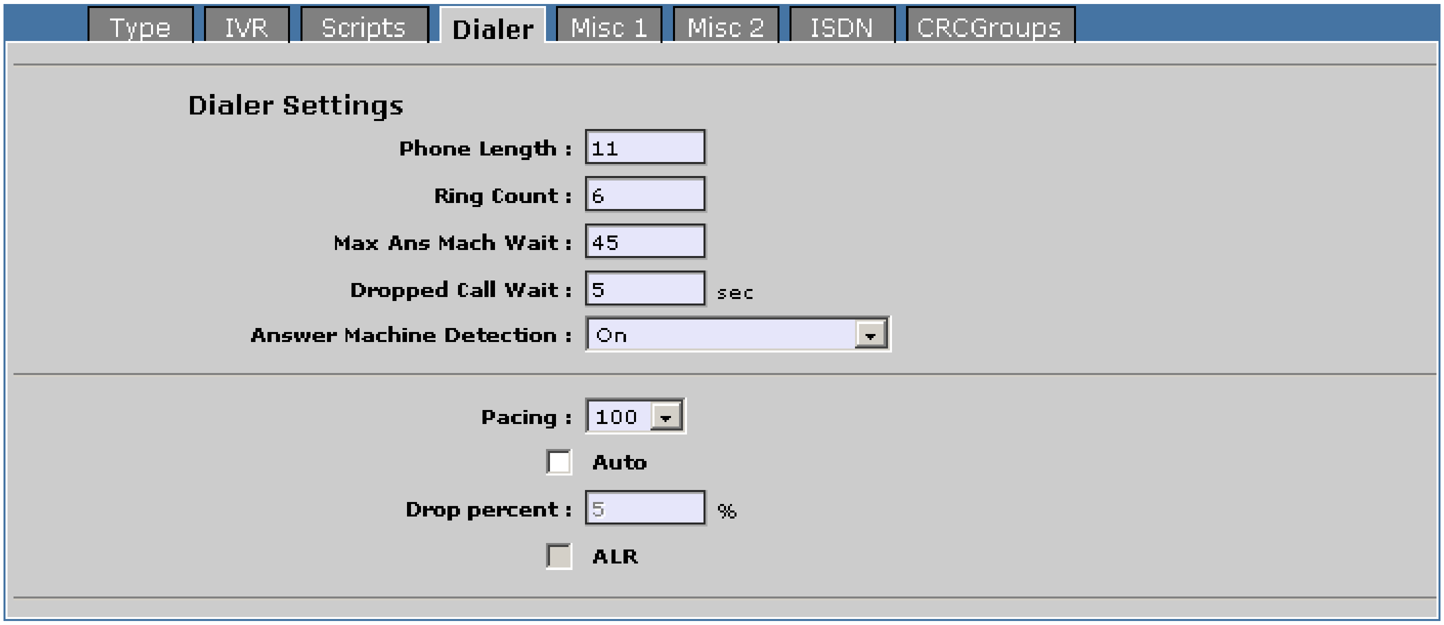
Use the following table as a reference for completing the Scripts area:

Feature:	Description:
Outbound Script:	Location of the first page of a script that would be used for outbound calls. HTML scripts should contain the filename (do not include the directory) of the HTML page that should be started when an agent pulls a call.
Inbound Script:	Location of the first page of a script that would be used for inbound calls. HTML scripts should contain the filename (do not include the directory) of the HTML page that should be started when an agent pulls a call.
Interrupt Script	Used to indicate whether or not an interrupt script should be used. If the box is checked, a script can be used that contains an interrupt button to stop a script should a call be terminated prior to the scripts completion (only used for clients with very specific circumstances). The location of the first page of the interrupt script would also need to be indicated. HTML scripts should contain the filename (do not include the directory) of the HTML page that should be started when an agent pulls a call.

Dialer Tab

1. Click on 

The Dialer area is displayed.



The Dialer area is used to indicate how the dialer should handle the length of phone numbers, rings, wait times, answering machine detection and the pacing of predictive Campaign dialing.

Use the following table as a reference for completing the Dialer area:

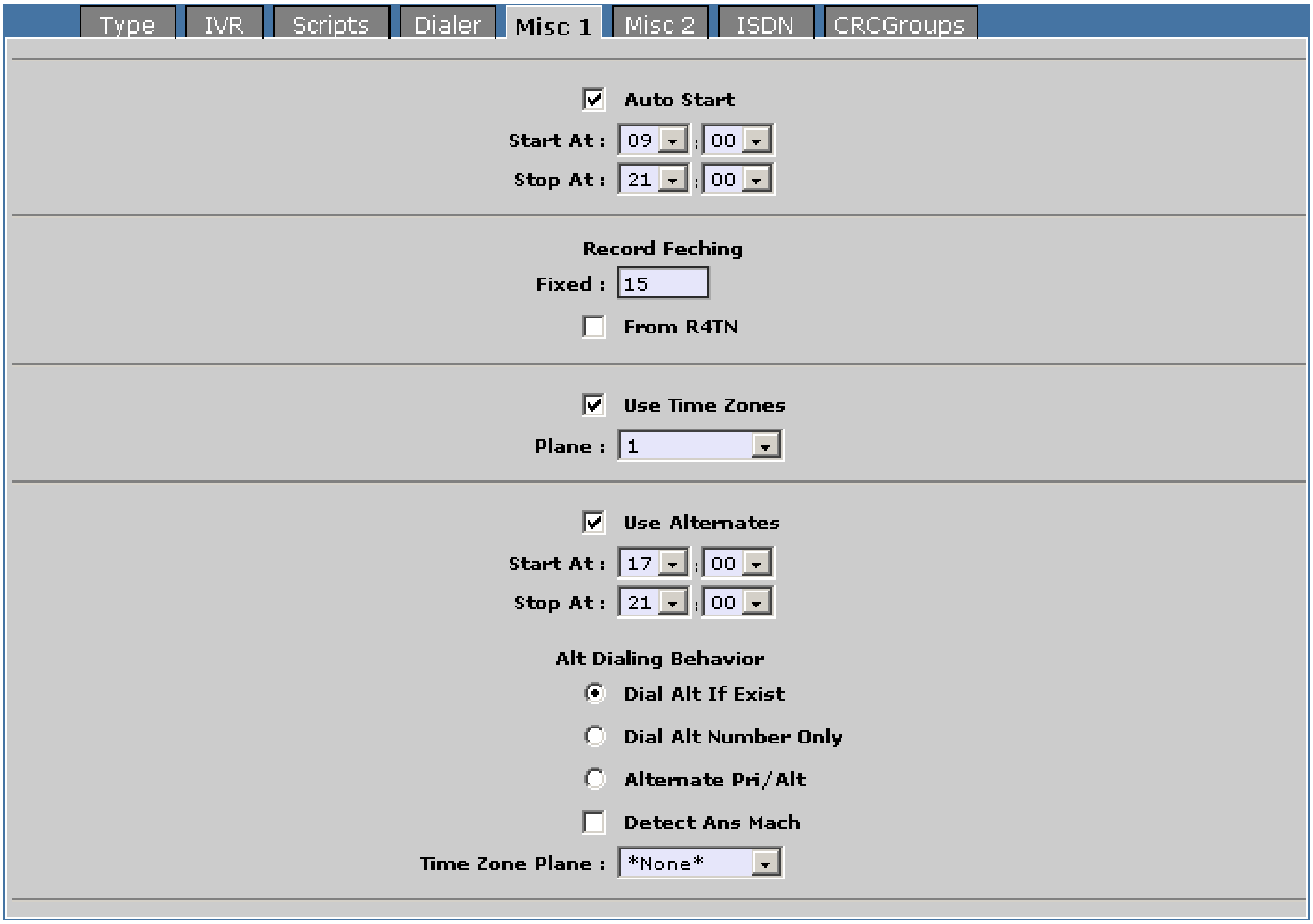
Feature:	Description:
Phone Length:	Is the length of phone numbers that are going to be dialed (total number of digits Prospector will be getting from a fetch for this Campaign). This is the combined total of Prefix, area code, phone number, and suffix digits that may be global or specific to this Campaign.
Ring Count:	How many times should the call ring before it is considered a no answer.
Max Ans Mach Wait:	Is the maximum number of seconds for the dialer to wait for a period of silence before "force" playing a message to the answering machine (this option should be set to a value other than 0, even if you never plan to play messages to an answering machine). If the answering machine message finishes before this time has passed, then the system will play your message immediately. However, if this time is reached, then the system will proceed with the delivery of the message even if the answering machine is still playing its message (subsequently, the first part of your system message will be cut off). **NOTE: People or AnsMach** would have to be checked in the **Connect To** area of the **Type** tab if you want answering machines to even be considered. And, you would need to indicate an **AnsMach** IVR Routine to play in the **IVR Routines to Handle:** area of the **IVR** tab as well.
Dropped Call Wait:	Used with a predictive Campaign as the number of seconds the system will wait with an agent not available before it will drop the call.

Answering Machine Detection:	When answering machine detection is: **On** – The system will determine whether the voice on the other endis a person or an answering machine. **Off** – This would allow you to completely turn off the systems ability to listen on the line and make the determination as to whether the voice on the other end is a person or an answering machine. This would pass any voice detected (person or answering machine) call as a connected call. The down side is that agents could be talking to answering machines (a lot). **Dialogic Pass-Thru** – Allows everything through (turns off answering machine detection and passes all calls through including operator intercepts, etc.). Would use the settings that are set in the “Dialogic Settings” area of Call Control.
Pacing:	On predictive Campaigns the system uses a dialing algorithm to determine when to start dialing the next number to keep the agents as busy as possible. This slide bar allows you to manually adjust this algorithm. By moving the bar to the right (above normal) the algorithm will be more aggressive. This will increase the drop rate but lower the agent wait time. 100 would be normal speed. The pick list contains choices from 0 to 200 (0 to 99 would be slower than normal speed pacing – 101 to 200 would be faster than normal speed pacing).
Auto (Pacing)	Allows the system to automatically adjust the pacing based on the algorithms of a predictive Campaign.
Drop percent: (Pacing)	Allows the system to automatically increase or decrease pacing as it attempts to maintain the indicated percentage of dropped calls in predictive Campaigns.
ALR	Automatic Line Ratio – the system will take away or add lines at will as it attempts to maintain the desired drop rate. Not as effective as using automatic pacing.

Misc 1 Tab

1. Click on 

The Misc 1 area is displayed:



The Misc 1 area is used to indicate if the Campaign will be auto started, how the dial records should be fetched,

Use the following table as a reference for completing the Misc 1 area:

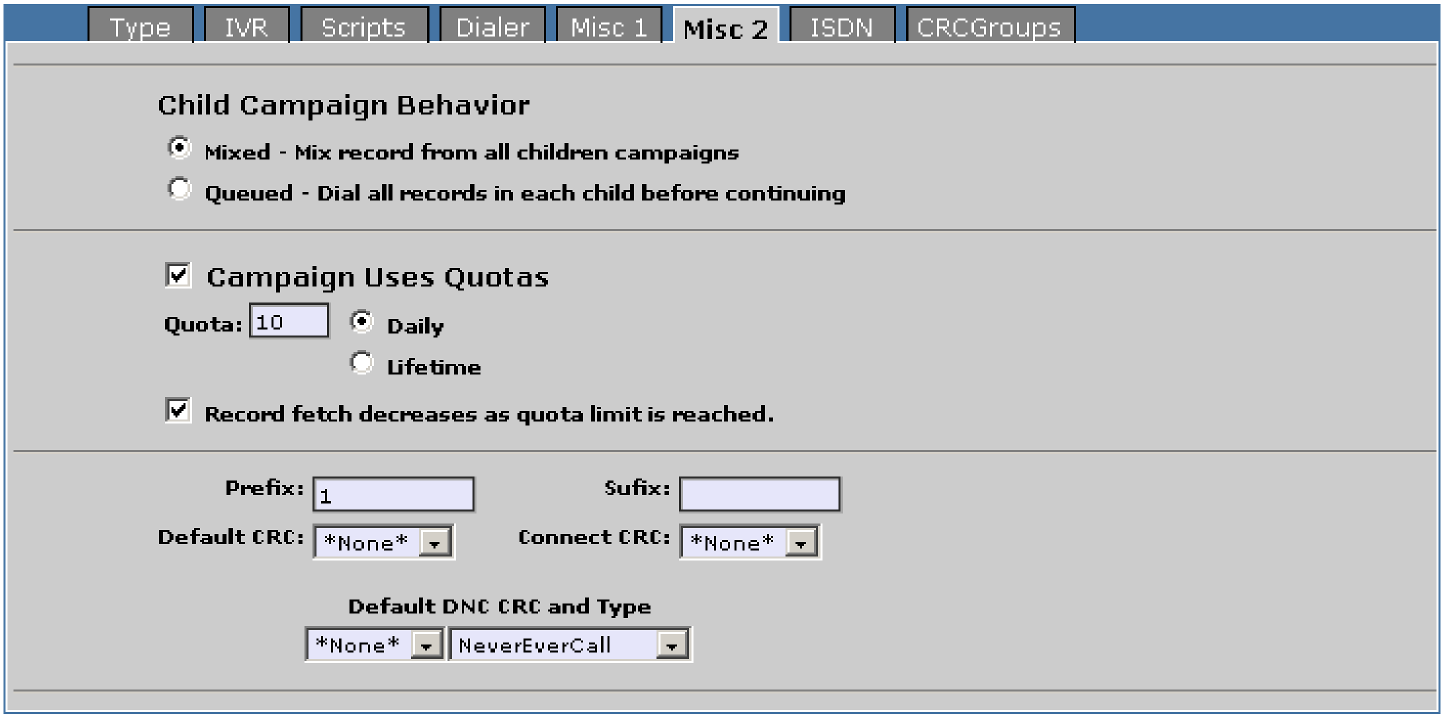
Feature:	Description:
Auto Start	Used to indicate whether or not the Campaign will be auto started. If the box is checked, the Campaign will be auto started at the designated **Start At:** and **Stop At:** times (without supervisor intervention). **NOTE**: The Supervisor application will need to be up and running and the Campaign will need to be in the Campaign Queue (the area on the right where Campaigns are started, paused, and stopped) in order for the Campaign to automatically start at the designated time.
Start At:	Used to indicate the time at which the Campaign will be automatically started.
Stop At:	Used to indicate the time at which the Campaign will be automatically stopped

Fixed: (Record Fetching)	Record Fetching is the number of dial records that should be placed in the queue for dialing per minute. The system will pull 3 times this number of dial records (For example, the Fixed: dial record fetch number of 50 would actually be fetching 150 dial records per minute). If this is a parent Campaign or a Campaign that will “hold lines” then the number of dial records to be fetched will be zero. The number of dial records fetched should be set between 50 and 75 for Campaigns that are loading a lot of dial records with a large number of agents.
From R4TN	Only used with clients that are running R4TN (Results for the Net) software in parallel with the Centcom suite of software.
Use Time Zones	Would be checked if you want the Campaign to dial according to time zones.
Plan: (Use Time Zones)	Used to indicate that you want the Campaign to override the standard time zones with a time zone plan.
Use Alternates	Would be checked if you want the Campaign to dial alternate phone numbers during designated hours.
Start At:	Used to indicate the time at which the Campaign will automatically start dialing alternate phone numbers.
Stop At:	Used to indicate the time at which the Campaign will automatically stop dialing alternate phone numbers.
Dial Alt If Exist	The first number (the primary number) will be called and in the event of a no answer, the second number (the first alternate number) for that party will be called, and so on.
Dial Alt Number Only	Directs the call to the second number (the first alternate number) instead of the first number (the primary number).
Alternate Pri/Alt	The first number (the primary number) will be called and in the event of a no answer, the second number (the first alternate number) for that party will be called, and so on (works the same as Dial Alt if Exists).
Detect Ans Mach	Would be checked if you want to detect alternate numbers that are answering machines.
Plan: (Use Alternates)	Used to indicate if you want the Campaign to use a time zone plan to dial alternate phone numbers.

Misc 2 Tab

1. Click on Misc 2

The Misc 2 area is displayed:



The Misc 2 area is used to indicate child Campaign behavior (if being used), how to use quotas (if being used), phone number prefix and suffix numbers (if being used), default and connect CRC's (Call Result Code's) types, and a default DNC (Do Not Call) CRC.

Use the following table as a reference for completing the Misc 2 area:

Feature:	Description:
Mixed - Mix records from all children campaigns	Dial records from all child Campaigns under the designated primary Campaign will be randomly dialed.
Queued - Dial all records in each child before continuing	Dial records in each child Campaign will be dialed in the order the child Campaigns appear in the Campaign Queue (the area on the right where Campaigns are started, paused, and stopped) of the Supervisor application. When the first child Campaign runs low on eligible dial records it will move to the next child Campaign and start pulling dial records, and so on until the dialing of all child Campaigns has been completed.
Campaign Uses Quotas	Would be checked if you want the Campaign to be based on quotas (For example, a Quota could be the number of appointments to be set for the day).
Quota:	Would be used to indicate the goal amount at which the Campaign should stop (For example, the maximum number of appointments that can be set for the day).
Daily (Quota)	Would be used to indicate that the Quota will be met for each day the Campaign is run.
Lifetime (Quota)	Would be used to indicate that the Quota will be met throughout the lifetime (multiple days) of the Campaign.

Record fetch decreases as Would be used to indicate that you would like the Campaign dial record fetching to slow down as the Quota amount is approaching (For example, if the Quota was 10, the Campaign fetching would start to slow down at 8 and substantially slow down the fetching at 9 so that the Campaign can stop at 10. This would reduce the risk of exceeding the Quota goal of 10).

Prefix: Would be used to indicate numbers that need to be dialed at the beginning of the dial record phone number (For example, the Prefix: of 91 might be used to indicate that a 9 is required to go through the PBX system and a 1 is required by the long distance provider).

Suffix: Would be used to indicate numbers that need to be dialed at the end of the dial record phone number (For example, the Suffix: of 230 might be used to indicate a billing code that is required by a phone vendor for billing purposes).

Default CRC: Would be used to indicate a default CRC that would be displayed when the Call Results screen appears for agents to disposition calls. The down side of this option would be the chance of agents clicking on to quickly exit from the Call Results screen (this would cause all of their calls to be dispositioned with the same default CRC code).

Connect CRC: Would be used to indicate the CRC that should be used when an agent connects 2 calls together.

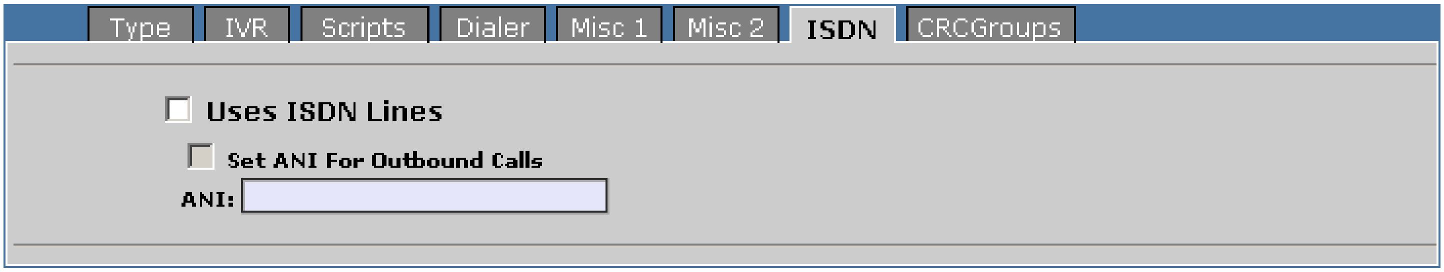
Default DNC CRC The system will automatically check when a call terminates to see if the CRC that is used in the Call Results area matches this default DNC CRC. If a match is found, then the call record will automatically be added to the DNC list of phone numbers.

Type of DNC CRC This is where the type of DNC CRC would be indicated. This field works in conjunction with the Default DNC CRC field.

ISDN Tab

1. Click on 

The ISDN area is displayed:



The ISDN area is used to indicate that the Campaign is using ISDN lines, as well as the ANI phone number that you would like to have displayed on the connected calls Caller ID equipment.

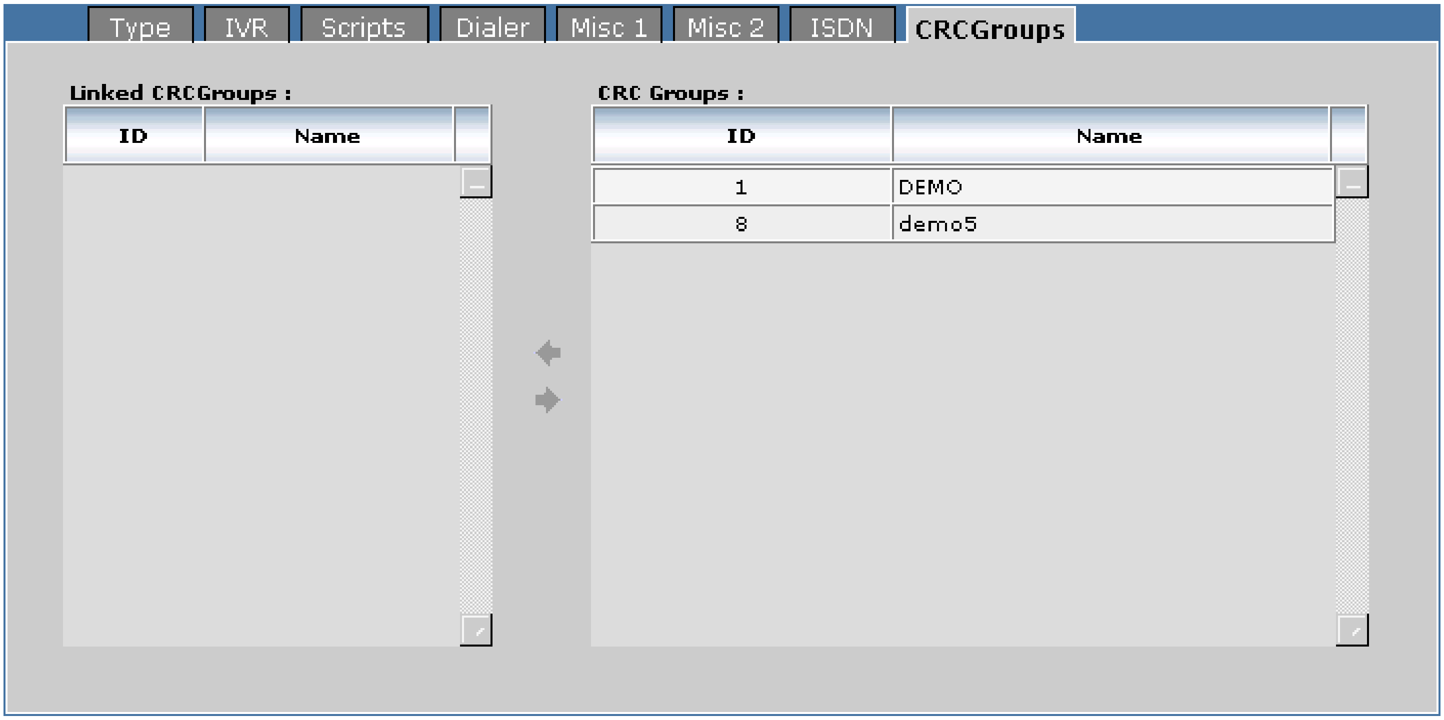
Use the following table as a reference for completing the ISDN area:

Feature:	**Description:**
Uses ISDN Lines	Where you would indicate that the Campaign makes calls over an ISDN T1. The ISDN T1 can display a phone number of your choosing on the connected calls Caller ID equipment.
Set ANI For Outbound Calls	Where you would indicate that you would like to display an ANI (Automatic Number Identification) aka “Caller ID” number on the connected calls Caller ID equipment.
ANI:	Type the caller ID number as you would like it to appear on the connected calls Caller ID equipment.

Assigning a CRC Group to a Campaign

1. Click on CRCGroups

The CRC Groups area is displayed:

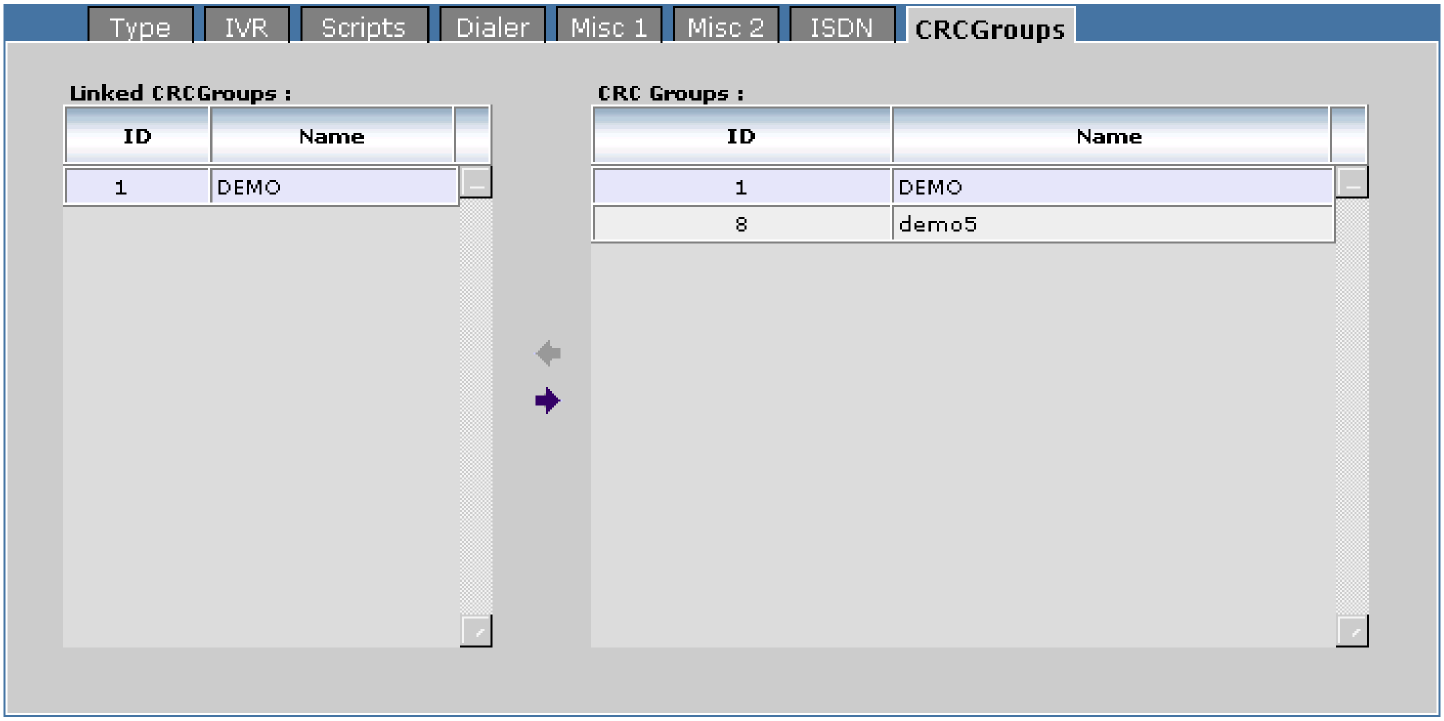


NOTE: The CRC Groups that are displayed in the CRC Groups tab were created in the CRC Groups tab of the Configurations area (the process of creating CRC's and CRC Groups will be discussed later in this chapter).

To add a CRC Group to a Campaign:

2. Double-click on a **CRC Group** in the **CRC Groups:** list that you would like to add to the **Linked CRCGroups:** area (For example, the CRC Group of **Pending**).

The CRC Group has been added to the Linked CRCGroups: area.



NOTE: CRC Groups can be removed from a Campaign by double-clicking on the CRC Group in the Linked CRCGroups: area which would move it back to the CRC Groups: list.

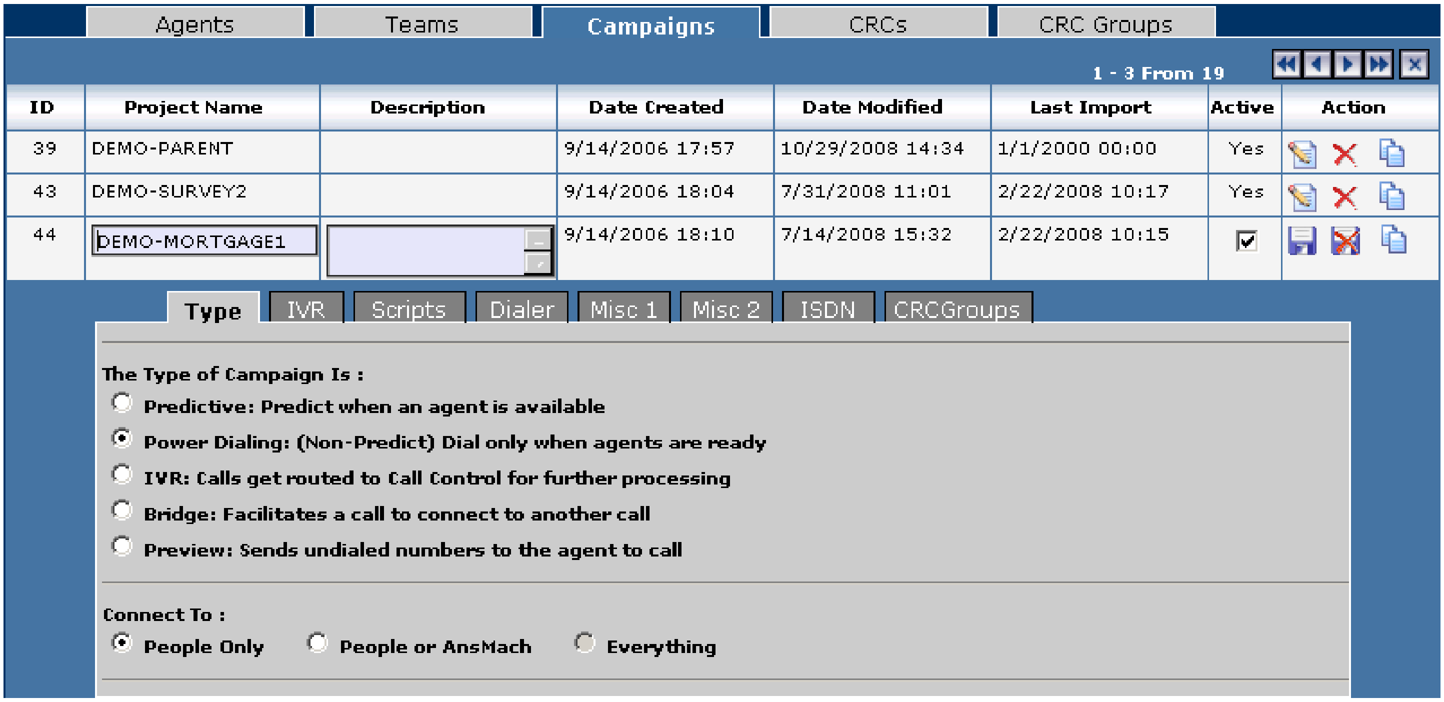
3. When you have finished adding CRC Groups to the Campaign, click on to save the new Campaign with all the settings.

Changing Existing Campaign Information

To change the settings of an existing Campaign:

1. Click on at the end of the Campaign row you would like to modify (For example, the Campaign of **Demo**).

The Campaign row to be modified is expanded with the Type, IVR, Scripts, Dialer, Misc 1, Misc 2, ISDN, and CRC Groups areas displayed:



2. Make any necessary modifications to the Campaign row.

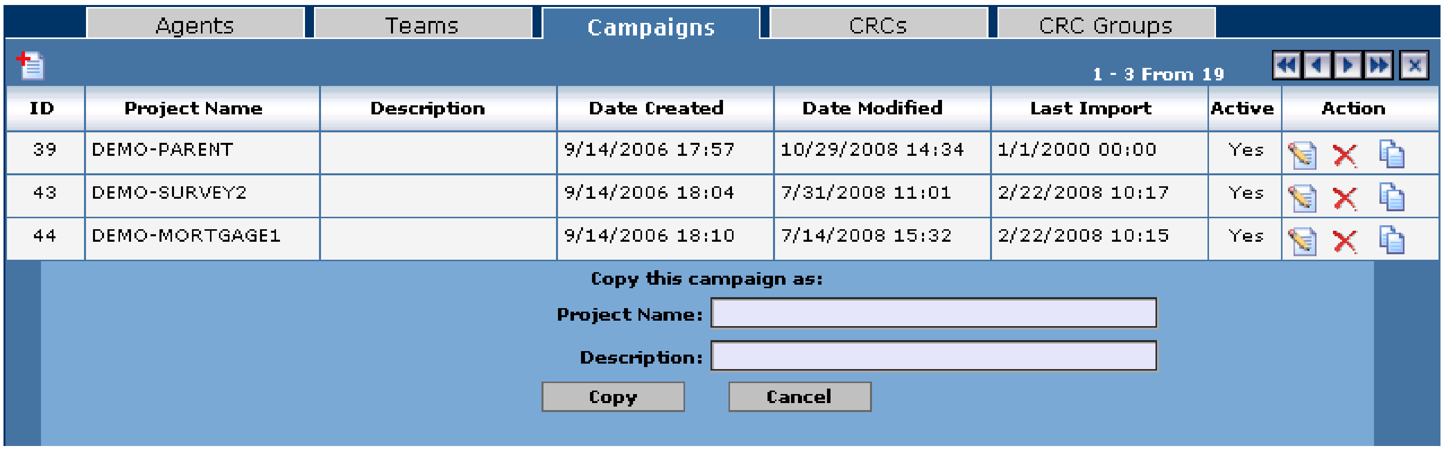
3. When you are finished making changes to the Campaign, click on to save all of your modifications.

Copying a Campaign

The Campaign area provides the ability to copy an existing Campaign when you want to create a new Campaign that will have a majority of the same settings as the existing Campaign.

To copy an existing Campaign:

1. Click on at the end of the existing Campaign row you would like to duplicate (For example, the Campaign of **Script**).



ID	Project Name	Description	Date Created	Date Modified	Last Import	Active	Action
39	DEMO-PARENT		9/14/2006 17:57	10/29/2008 14:34	1/1/2000 00:00	Yes	
43	DEMO-SURVEY2		9/14/2006 18:04	7/31/2008 11:01	2/22/2008 10:17	Yes	
44	DEMO-MORTGAGE1		9/14/2006 18:10	7/14/2008 15:32	2/22/2008 10:15	Yes	

2. Click in the text box next to **Project Name:**.

3. Type a new **Campaign name** for the copied project.

4. Click in the text box next to **Description:**.

5. Type a new **Description** for the copied project.

6. Click on Copy to create the new (copied) Campaign.

7. Click on at the end of the copied Campaign row you would like to modify.

8. Make any necessary modifications to the copied Campaign.

9. When you are finished making changes to the copied Campaign, click on to save all of your modifications.

Deleting a Campaign

To delete a Campaign:

1. Click on ✕ at the end of the existing Campaign row you would like to delete (For example, the Campaign of **DEMO-SURVEY2**).

Agents | Teams | Campaigns | CRCs | CRC Groups

1 - 3 From 19

ID	Project Name	Description	Date Created	Date Modified	Last Import	Active	Action
39	DEMO-PARENT		9/14/2006 17:57	10/29/2008 14:34	1/1/2000 00:00	Yes	
43	DEMO-SURVEY2		9/14/2006 18:04	7/31/2008 11:01	2/22/2008 10:17	Yes	
44	DEMO-MORTGAGE1		9/14/2006 18:10	7/14/2008 15:32	2/22/2008 10:15	Yes	

2. Click on OK to confirm the deletion.

Creating Call Result Codes (CRC's)

CRC's (Call Result Codes) are used to identify the results (disposition) of each call that is completed by an agent or the system (For example, the CRC of **NI: Not Interested** could be used to indicate a disposition of the contact not being interested in the subject of the call).

You will need to create CRC's for every type of call disposition you would like to track as an agency in Campaigns.

Let's create a new CRC.

1. If necessary, click on Configurations

2. Click on CRCs

The CRC's area is displayed:

Agents | Teams | Campaigns | CRCs | CRC Groups

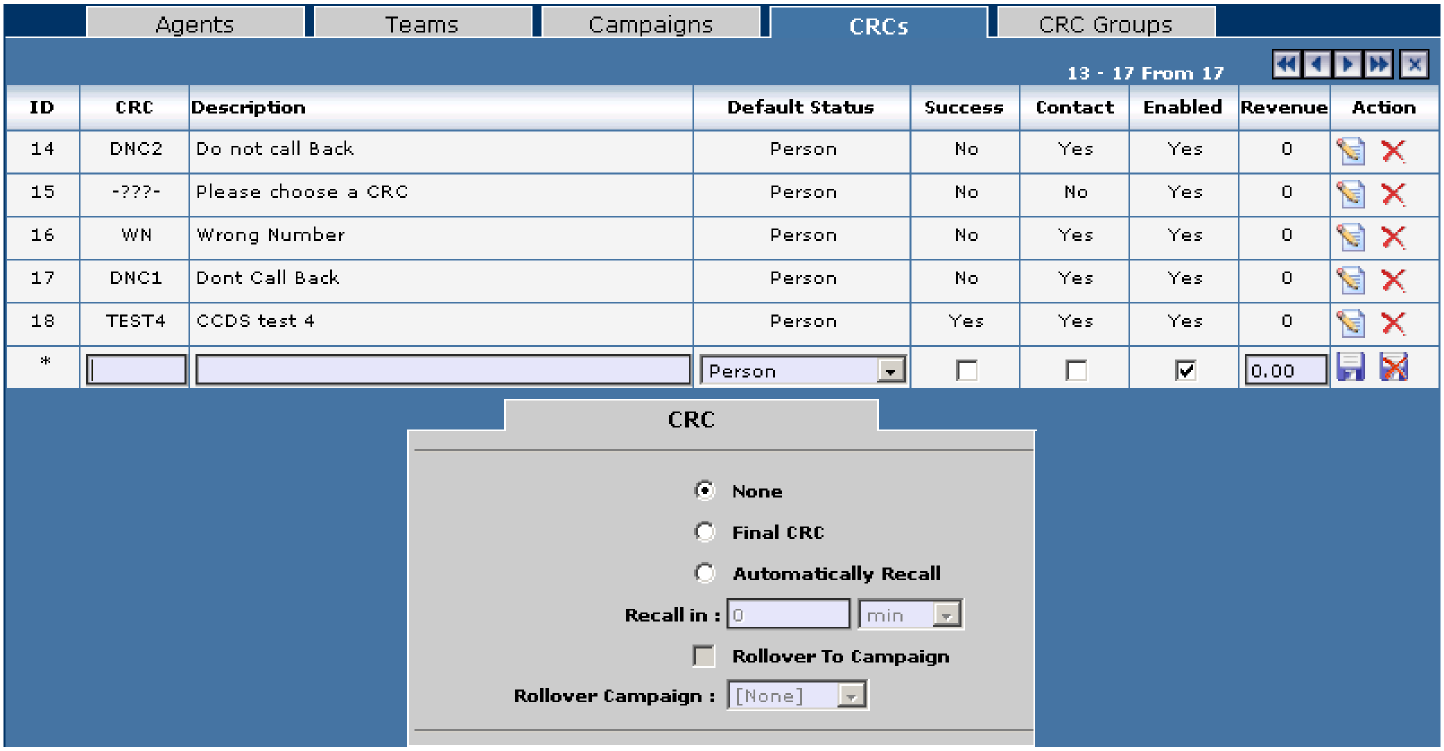
6 - 10 From 17

ID	CRC	Description	Default Status	Success	Contact	Enabled	Revenue	Action
6	SALE	Sale	Person	Yes	Yes	Yes	100	
8	NA	No Answer	Person	No	No	Yes	0	
9	NAV	Not Available	Person	No	Yes	Yes	0	
10	DSC	Deceased	Person	No	Yes	Yes	0	
11	NI	Not Interested	Person	No	Yes	Yes	0	

5 per page

3. Click on above the ID column to create a new CRC.

A new record row is displayed at the bottom of the CRC table with a dialog box for CRC settings:



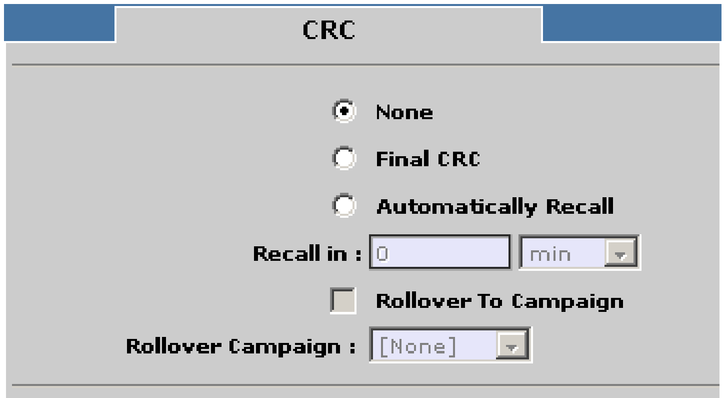
4. Enter the new CRC information.

Use the following table as a reference for completing the new CRC information:

Feature:	Description:
CRC	Would be used to indicate the CRC abbreviation (this field is limited to a maximum of 5 characters).
Description	Would be used to indicate a description of the CRC abbreviation.
Default Status	Would be used to indicate what the default status of this CRC code should be interpreted as by the system. The following list displays the available choices: - Person - No Answer - Busy - Operator Intercept - Drop/Hang Up - Answer Machine - Fax Machine/Modem
Success	Would be used to indicate (with a “Yes”) that this CRC code was considered a success (For example, a sale would be considered a success, setting an appointment would be considered a success, an agreement to pay a collection amount would be considered a success, etc.).
Contact	Would be used to indicate (with a “Yes”) that this CRC code is considered having reached the intended contact with this call.
Enabled	Would be used to indicate (with a “Yes”) that this CRC code is currently active and will show up for call disposition, in statistical information areas, for reporting purposes, etc.
Revenue	Would be used to indicate a dollar amount value for this CRC code.
Action	The icons available in the Action column are used to edit an existing CRC, delete an existing CRC, duplicate an existing CRC or save a new/modified CRC.

CRC Tab

The CRC area is used to indicate additional information about the CRC you would like to create.



Use the following table as a reference for completing the CRC area:

Feature:	**Description:**
None	Would be used to indicate this is not a final CRC or a CRC that automatically needs to be recalled.
Final CRC	Would be used to indicate if this CRC code will be considered the final CRC of this dial record. Once a lead (not a phone number) is dispositioned with a Final CRC, the dial record will not be called again on any of its numbers (primary or alternate). It does not matter if the Final CRC was used on a primary number or alternate number. Once a Final CRC is set, the dial record is done (unless reloaded).
Automatically Recall	Would be used to indicate if this CRC code will automatically cause the dial record to be recalled.
Recall in:	The number you enter here would correlate with whatever is selected in the next field of Mins./Hours/Days (For example, if you wanted to perform this recall in 2 hours, you would make Recall in a 2 and designate the next field as Hours).
Mins/Hours/Days	Would be used to indicate you would like the Campaign to perform this recall in Minutes, Hours, or Days.
Rollover to Campaign	Would be used to indicate you would like the recall dial record to roll over to another Campaign.
Rollover Campaign:	Would be used to indicate a different Campaign you would like the recall dial record to be rolled over to.

When you have completed the Add CRC area, click on to save the new CRC with all the settings.

Deleting CRC's

To delete a team:

1. Click on at the end of the existing CRC row you would like to delete (For example, the CRC of **Sale**).

Agents | Teams | Campaigns | CRCs | CRC Groups

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ID	CRC	Description	Default Status	Success	Contact	Enabled	Revenue	Action
14	DNC2	Do not call Back	Person	No	Yes	Yes	0	
15	-???-	Please choose a CRC	Person	No	No	Yes	0	
16	WN	Wrong Number	Person	No	Yes	Yes	0	
17	DNC1	Dont Call Back	Person	No	Yes	Yes	0	
18	TEST4	CCDS test 4	Person	Yes	Yes	Yes	0	

2. Click on OK to confirm the deletion.

Creating New CRC Groups

You will need to add CRC's to groups in order to have disposition codes available for the Call Results area in Campaigns. Groups are a collection of Campaigns and CRC's.

NOTE: If a Campaign and CRC are not in the same group, then agents will not be able to disposition calls.

Let's create a new CRC Group.

1. If necessary, click on Configurations

2. Click on CRC Groups

The CRC Groups area is displayed:

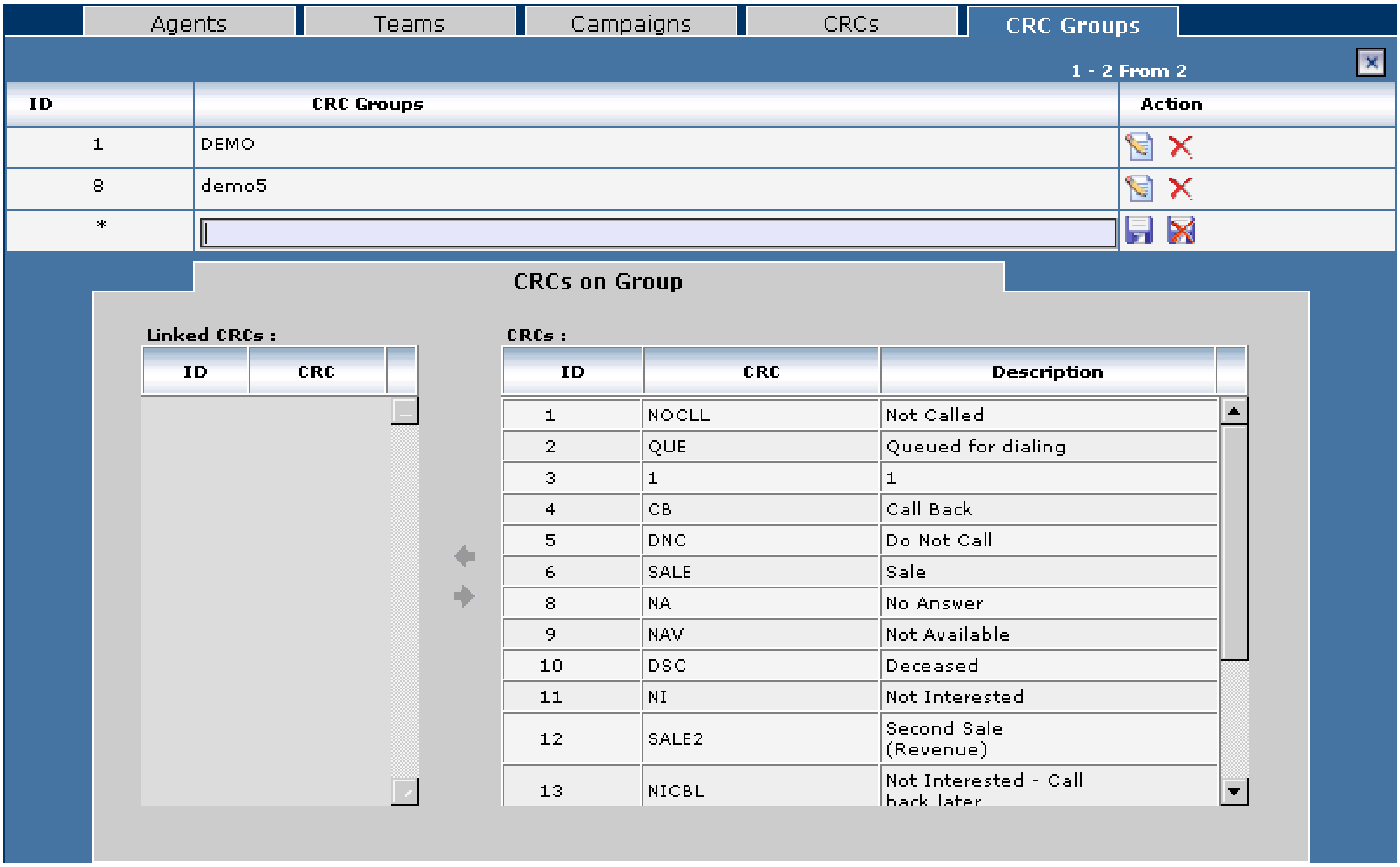
Agents | Teams | Campaigns | CRCs | CRC Groups

1 - 2 From 2

ID	CRC Groups	Action
1	DEMO	
8	demo5	

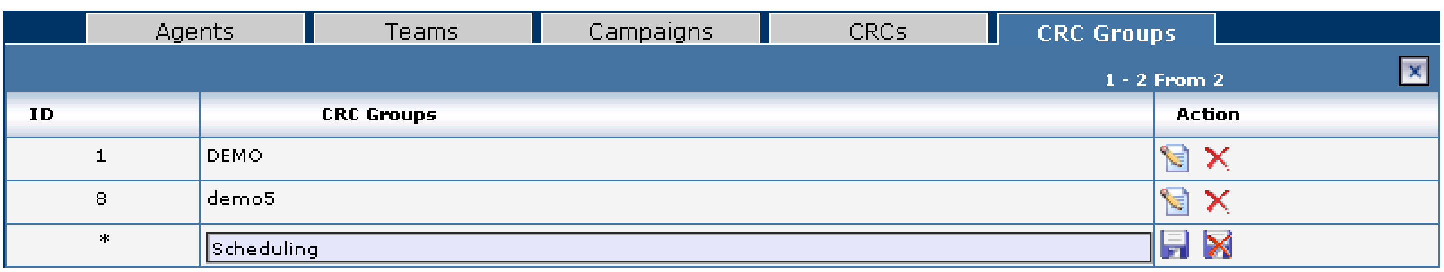
3. Click on above the ID column to create a new CRC Group.

A new record row is displayed at the bottom of the CRC Group table with a dialog box for CRCs on Group settings.



4. Click in the text box of the **CRC Groups** name column.

5. Type the **CRC Group name** (For example, the CRC Group name of **Scheduling**).



6. Click on  in the Action column of the new CRC Group row to save and create the new CRC Group.

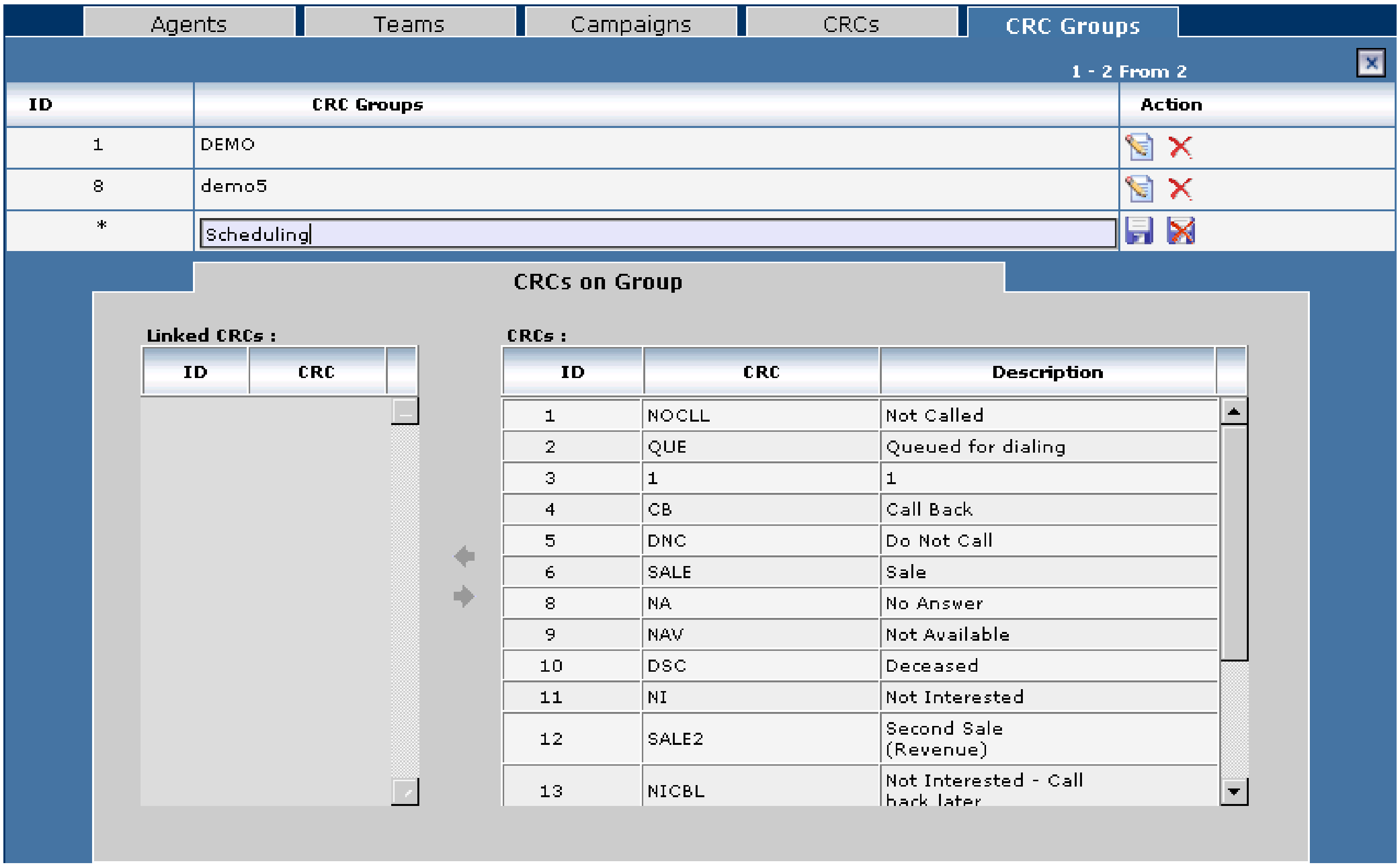
Assigning CRC's to CRC Groups

Now that the CRC Group has been created, it's time to add the CRC(s) you want to include in the CRC Group.

To add CRC(s) to a CRC Group:

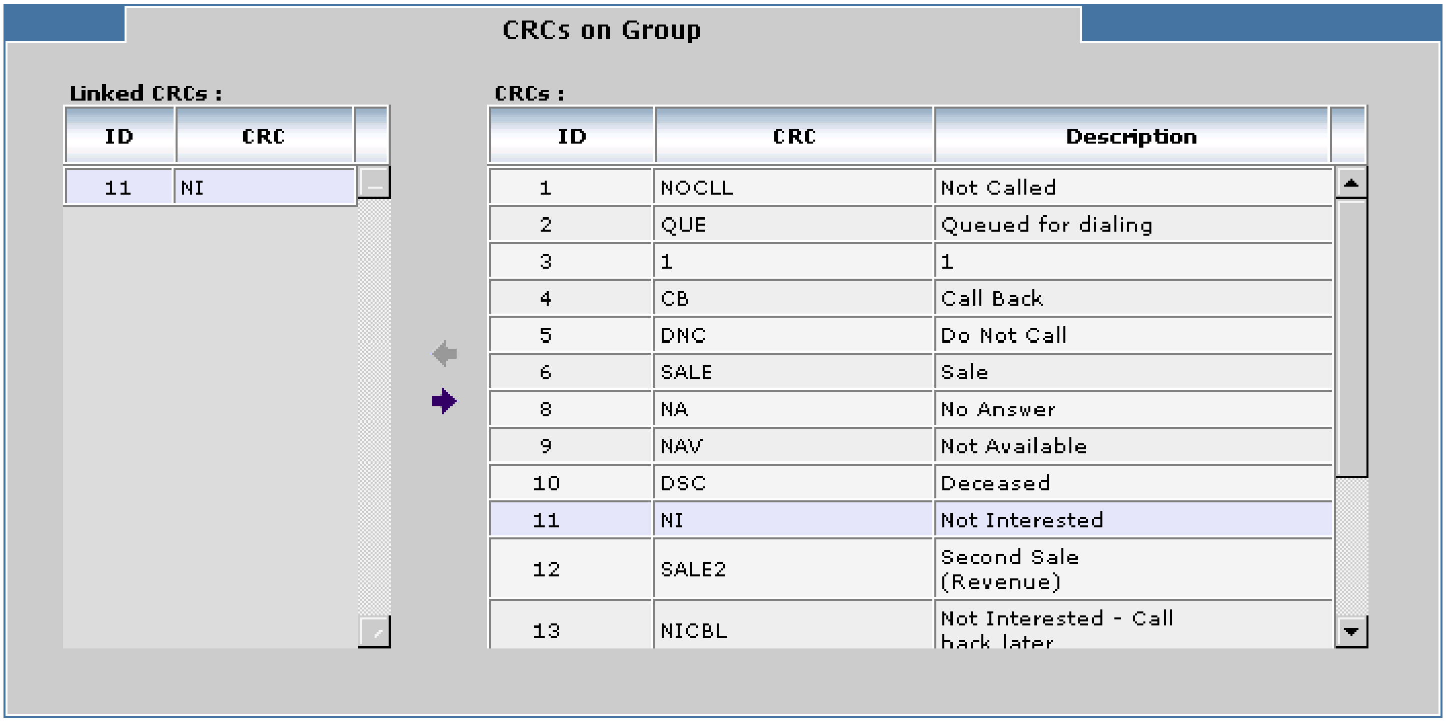
1. Click on  at the end of the CRC Group row you would like to add CRC(s) to (For example, the CRC Group of **Scheduling**).

The CRC Group row to be modified is expanded with the CRCs on Group area displayed.



2. Double-click on a **CRC** in the **CRCs:** list you would like to add to the **Linked CRCs:** area (For example, the CRC of **NI - Not Interested**).

The CRC has been added to the Linked CRCs: area.



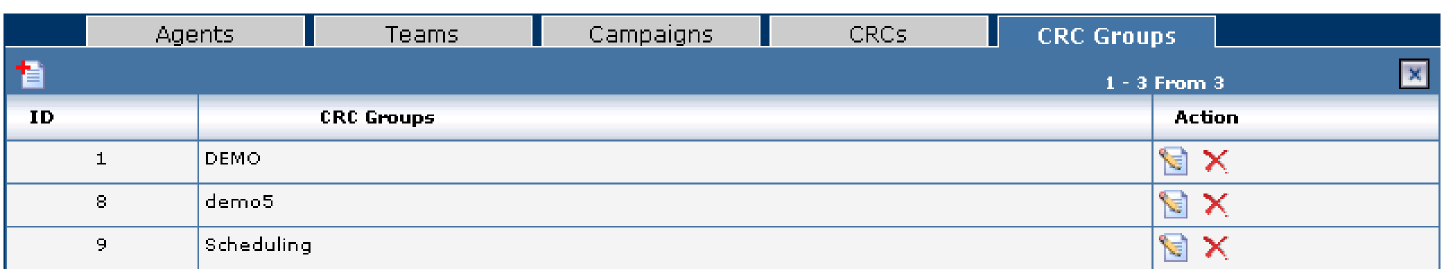
NOTE: The arrows that are located between the Linked CRC's: and CRC's: lists can also be used to move CRC's back and forth (you would need to click on the row to move before using the arrows).

3. When you have finished adding CRC's to the CRC Group, click on to save the **Linked CRC's:** area.

NOTE: CRC's can be removed from a CRC Group by double-clicking on the CRC in the Linked CRCs: area which would move it back to the CRCs: list.

Deleting CRC Groups

1. Click on at the end of the existing CRC Group row you would like to delete (For example, the CRC Group of **Scheduling**).



2. Click on OK to confirm the deletion.

Importing Data

1. Click on Import

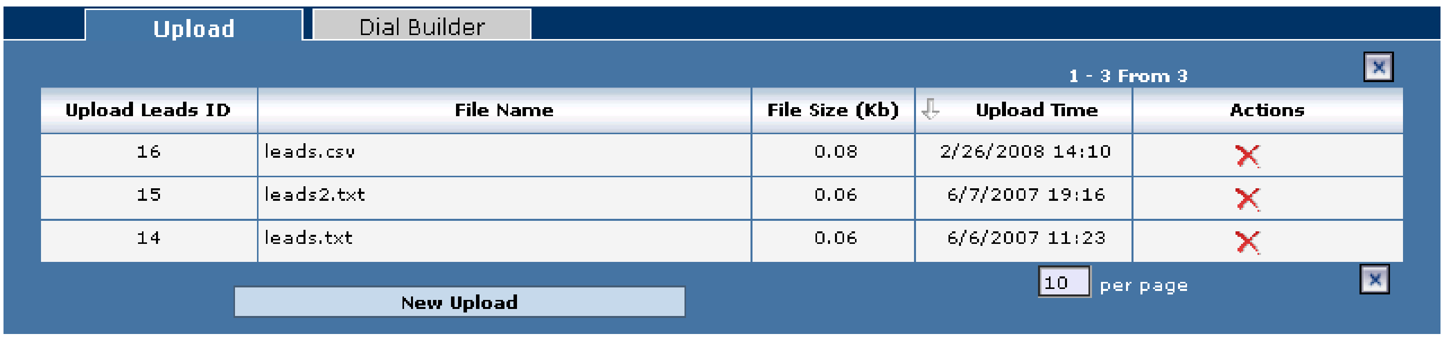
The Upload and Dial Builder tabs are displayed:

Uploading Data Files

The data file will need to be introduced to the Import area before the Import Template can be built.

1. Click on Upload

The Upload area is displayed:

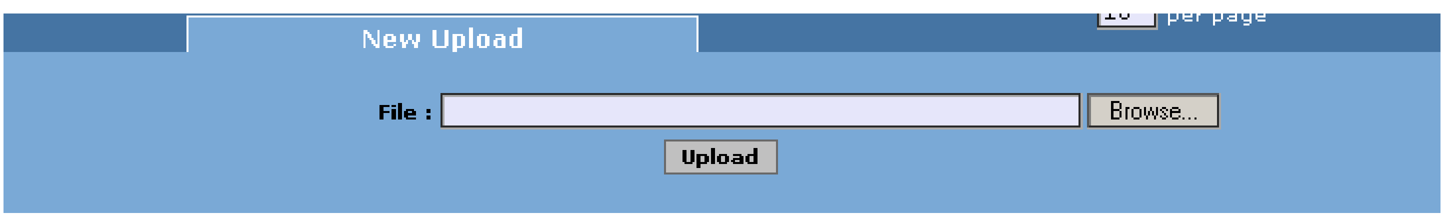


All of the data files that have been previously uploaded to the Import area are listed.

To load a data file:

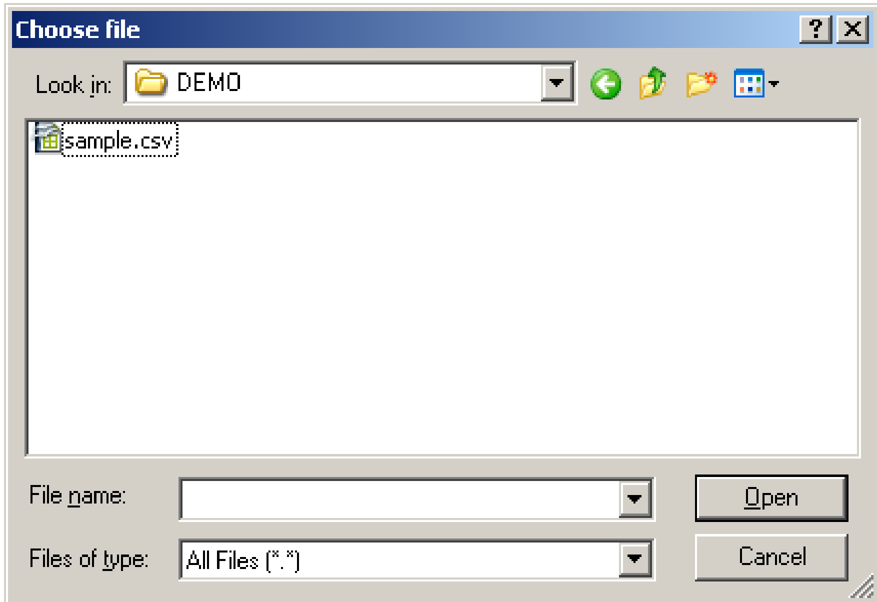
2. Click on **New Upload**

The New Upload area is displayed:

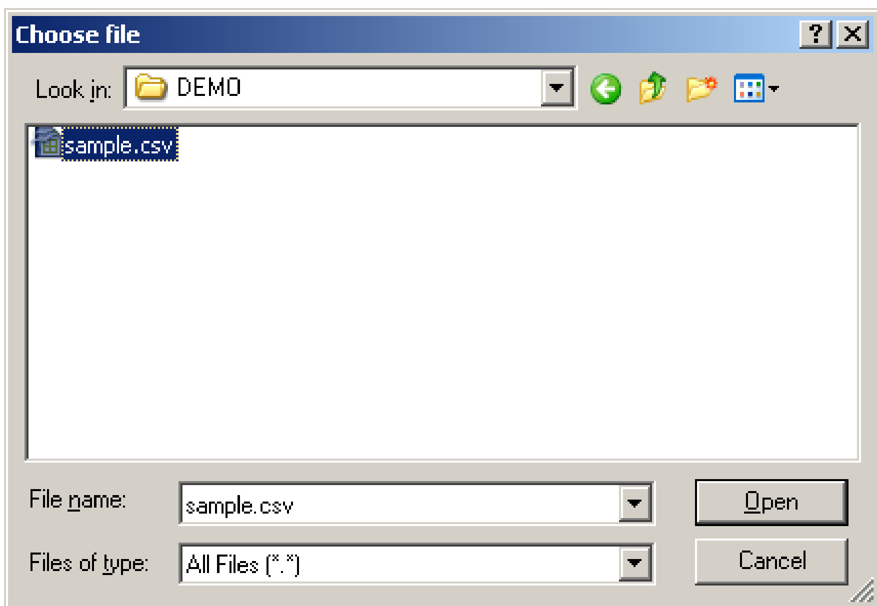


3. Click on Browse...

The Choose File area is displayed:



4. Click on the **Data File** you would like to load (For example, the data file of **sample.csv**).



5. Click on Open to pull the selected data file into the New Upload area.

The data file is displayed in the New Upload area:

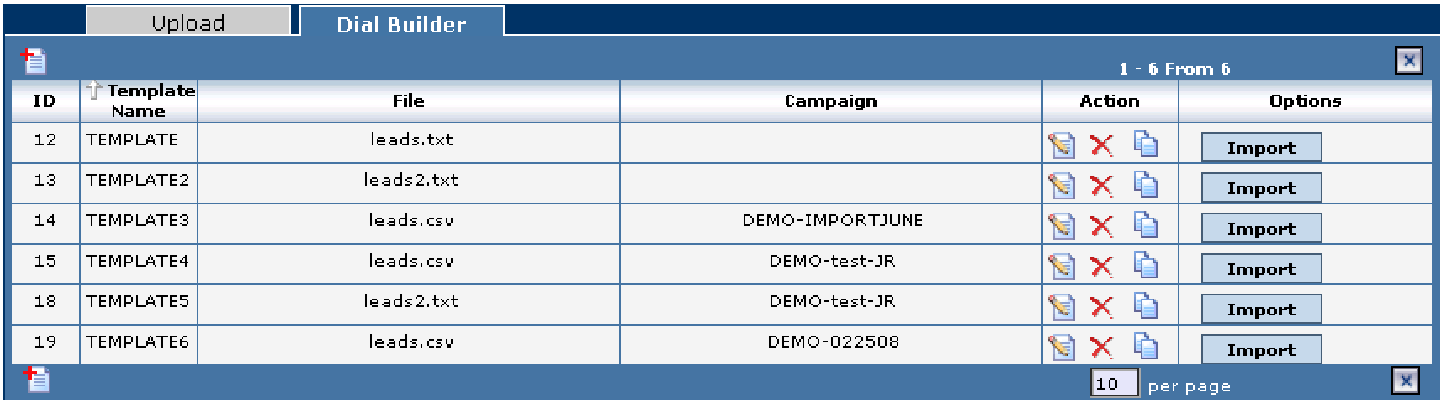
6. Click on **Upload** to upload the data file.

The data file will now be available in the Dial Builder area to create an Import Template.

Building an Import Template in the Dial Builder Area

1. Click on Dial Builder

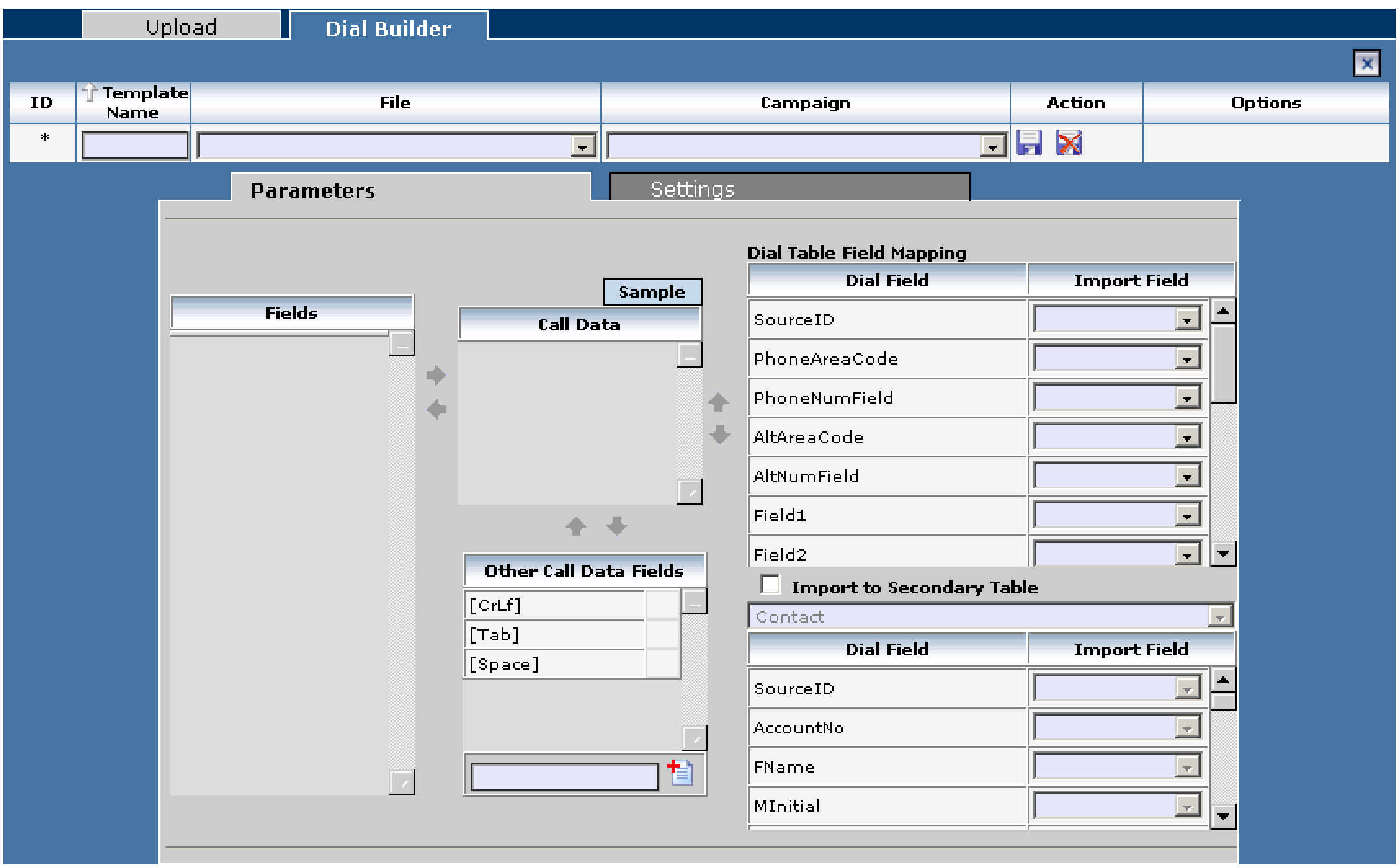
The Dial Builder area is displayed:



This is where an Import template is created to map the import file data to a Campaign so the data can be imported as dial records.

2. Click on above the ID column to create a new Import template.

A new record row is displayed in the Dial Builder table with a dialog box for Parameters and Settings.

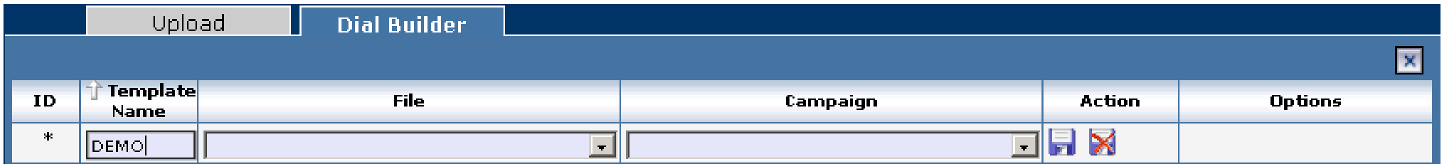


Parameters Tab

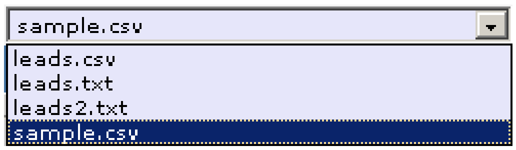
Let's set the Parameters for an import.

1. Click in the text box under **Template Name.**

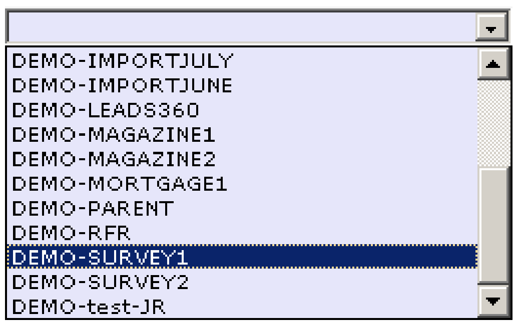
2. Type a **name** for the Import Template (For example, the Import Template name of **Demo**).



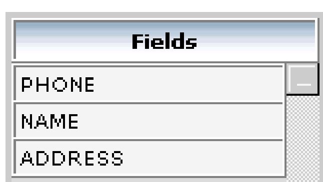
3. Under **File**, click on and select the data file that contains the dial records for this import (For example, the File of **sample.csv**).



4. Under **Campaign:**, click on and select the Campaign the imported dial records will be pulled into (For example, the Campaign of **DEMO-SURVEY1**).



The fields that are available from the displayed data file will be listed in the **Fields** area as displayed below.

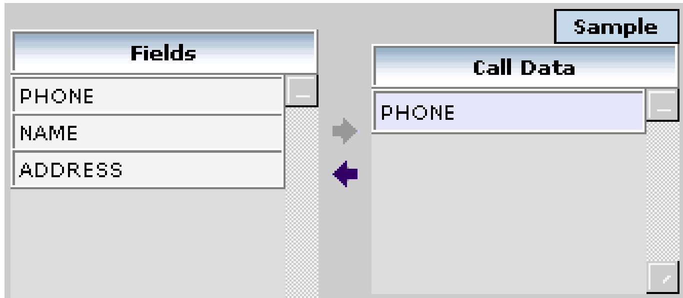


These fields will be used to build the **Call Data** template of dial record information that you would like to appear for an agent. The Call Data will be displayed when a call is received by an agent in the Call Info area of the Agent application.

Building a Call Data Template

Let’s build a Call Data template.

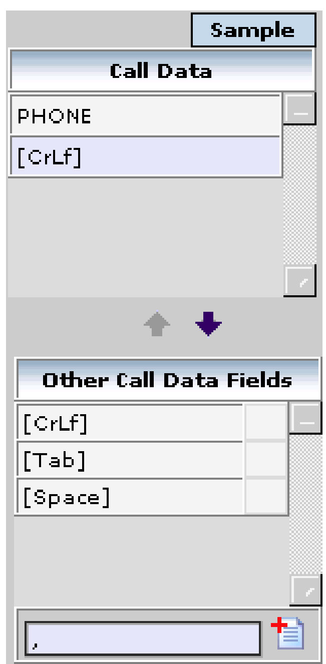
1. Double-click on a **field** from the **Fields** list that you would like to display dial record information in the **Call Data** area (For example, the **Phone** field which would display the phone number).



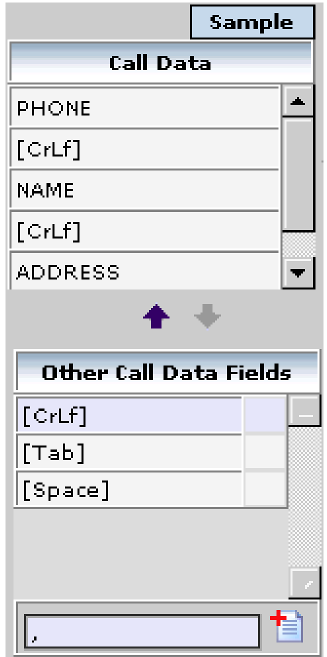
The following Other Call Data Fields are available to insert between data fields:

Feature:	Description:
[CrLf]	Would be used to insert a carriage return (blank line) in the Call Data.
[Tab]	Would be used to insert a tab worth of space in the Call Data.
[Space]	Would be used to insert a space in the Call Data.
	Would be used to insert free form text in the Call Data (For example, the comma “,” between **Name** and **Address** could be inserted in the **Other Call Data Fields** list so it can be added to the Call Data). You would click in the text box under **Other Call Data Field:**, type the free form text, then press  to add it to the **Other Call Data Fields** list.

2. Double-click on **[CrLf]** from the **Other Call Data Fields** list to create a blank line.



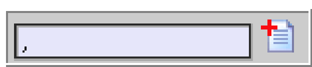
3. Continue to double-click on **Fields** and **Other Call Data Fields** until the following Call Data template list has been built:



Let's create some free form text for the Call Data area.

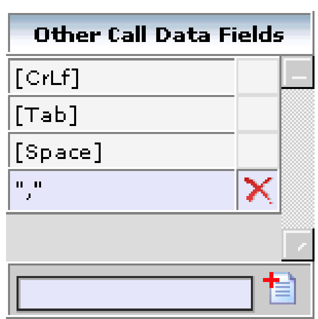
4. Under **Other Call Data Fields**, click in the text box.

5. Type some free form text (For example, the free form text of "," for a comma between City and State).

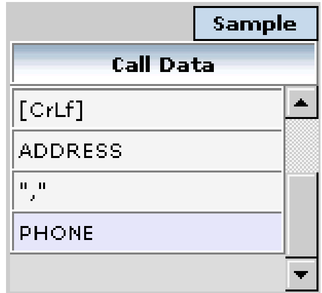


6. Click on  to create the free form text.

The free form text is now displayed in the **Other Call Data Fields** list.

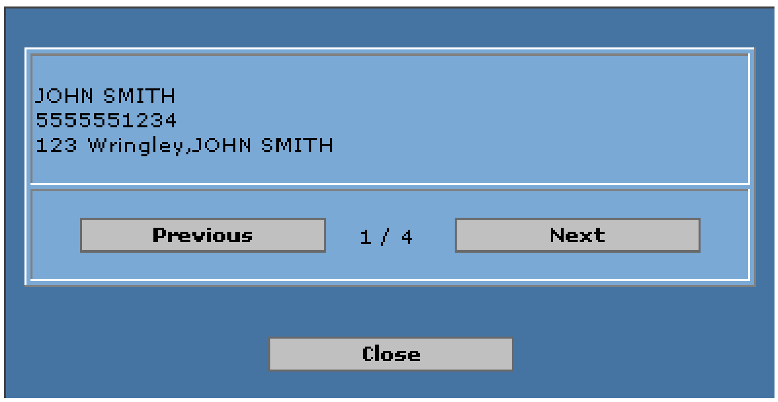


7. Continue to double-click on **Fields** and **Other Call Data Fields** until the following Call Data template list has been added to the bottom of the existing list:



8. Click on Sample

The Sample Call Data area is displayed with a sample of the dial records, as they would appear in the Call Info area of the Agent application.



9. Click on Next to view a few of the sample dial records to verify this is how you would like the Call Data to appear.

10. Click on Close to exit from the Sample Call Data area.

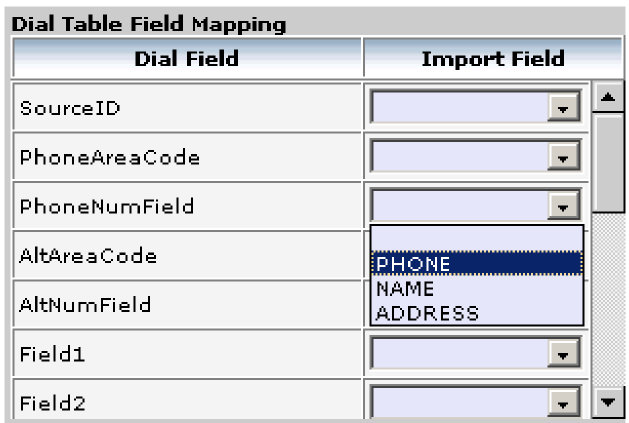
Data File Field Mapping

The primary key (field) from the data file needs to be identified in the Dial Table Field Mapping area. The primary key is the piece of data that is unique to every dial record in a data file (For example, the primary key of Phone would be a very common unique field of data in most data files).

1. Under **Dial Table Field Mapping**, click on in the **Import Field** of the **Dial Field** you want to identify (For example the **Dial Field** of **PhoneNumField**).

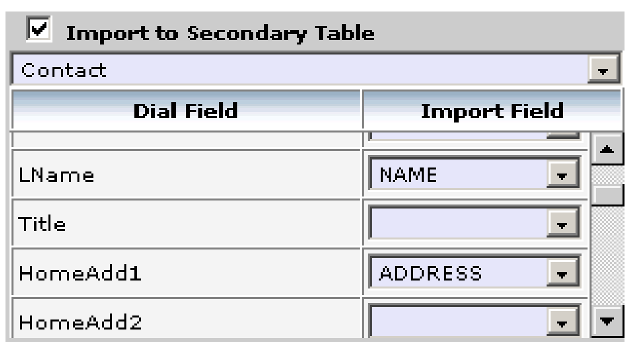
2. Locate and click on the **Import Field** that represents the primary key (For example, the Import Field of **Phone**).

NOTE: If the phone number and the area code are split apart in the data file, you can place the field that corresponds with each in the appropriate fields here. Alternate numbers can also be mapped to their corresponding fields.



The Import To Secondary Table area would be used when contact information is being pulled into scripts by mapping the Dial Field's to the Import Field's for each contact field that is contained in the script.

The following example displays mapped contact fields for a script:



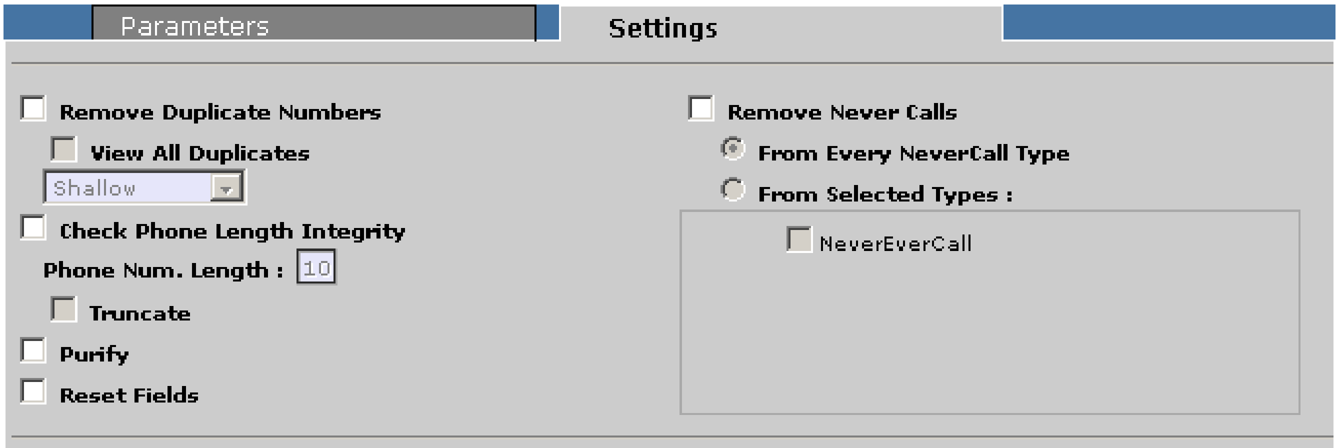
NOTE: Import To Secondary Table would be selected, the **Secondary Table** would be indicated (For example the **Contact** Table), and the **Dial Field** 's would be mapped to the **Import Field**

This would only apply to clients using scripts with contact information being pulled into the script. If you are not using scripts, then this process can be skipped.

Settings Tab

1. Click on 

The Settings area is displayed.



Use the following table as a reference for completing the Dial Builder Settings information:

Feature:	**Description:**
Remove Duplicate Numbers	When this option is checked, all dial records that are being added will be checked against any dial records already in the Dial table of that particular Campaign, and any duplicate dial record phone numbers will not be added during the import process.
View All Duplicates	Will display all of the duplicate dial records that are encountered during the import process.
View All Duplicates (Multi Dup Options pick list)	Would be used to indicate how multiple number dialing should be handled. Used primarily in collection environments to load duplicate POE's (Places of Employment). The following list displays the available choices with a description of each: - **None** – You do not want to scrub against any multiple duplicate numbers. - **Shallow** – Will only scrub against that account's phone number. The rest of the records in the Dial Table and the rest of the import data will not be scrubbed against. Therefore, if a dial record has 4 alternate numbers then it will scrub all 4 against themselves along with the primary number (but nothing else). - **ShallowNoPri** – Works the same as **Shallow**. However, the primary number will not be scrubbed against. - **Deep** – Will scrub against the primary number, alternate numbers, and all of the other dial records. - **DeepNoPri** – Works the same as **Deep**. However, the primary number will not be scrubbed against.
Check Phone Length Integrity	When this option is checked, phone numbers will be checked for the integrity of the phone length that is indicated in the **Phone Num Length:** option.
Phone Num Length:	When this option is checked, phone numbers will be striped of any dashes, spaces etc. in order to maintain the indicated phone length during the import process.
Truncate	When this option is checked, phone number digits will be truncated according to the designated **Phone Num Length:** during the import process
Purify	When this option is checked, alpha characters and other symbols will be removed from phone numbers during the import process.

Reset Fields	When this option is checked, the Campaign information, call data, and conditions will stay consistent even if a new source table is selected. This setting is used in specific call center applications and should be used with caution and direction from the Centcom Technical Support Staff.
Remove Never Calls	When this option is checked, the existing list of DNC (Do Not Call) phone numbers will be compared against the list of phone numbers that are being imported. Any matches will be dealt with according to how the next 2 options are selected (**From Every NeverCall Type** and **From Selected Types:**).
From Every NeverCall Type	When this option is selected, the existing list of DNC (Do Not Call) phone numbers will be compared against the list of phone numbers that are being imported and any matches will not be imported for every existing NeverCall DNC type.
From Selected Types:	When this option is selected, the existing list of DNC (Do Not Call) phone numbers will be compared against the list of phone numbers that are being imported and any matches will not be imported for every NeverCall DNC type that is selected in the DNC list. **NOTE:** Click on each existing DNC CRC from the displayed list that you want to be compared against. (For example, the DNC CRC of **NeverEverCall**

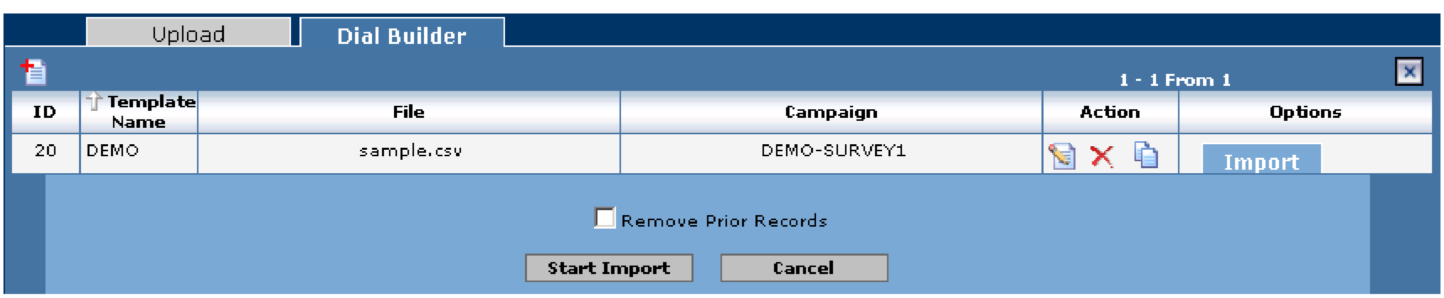
Saving an Import Template

Click on to save the import settings as a **.dbr** template that can be used for future imports.

Performing the Data File Import

1. Click on Import next to the Import Template you would like to import data into (For example, the **Demo** Import Template).

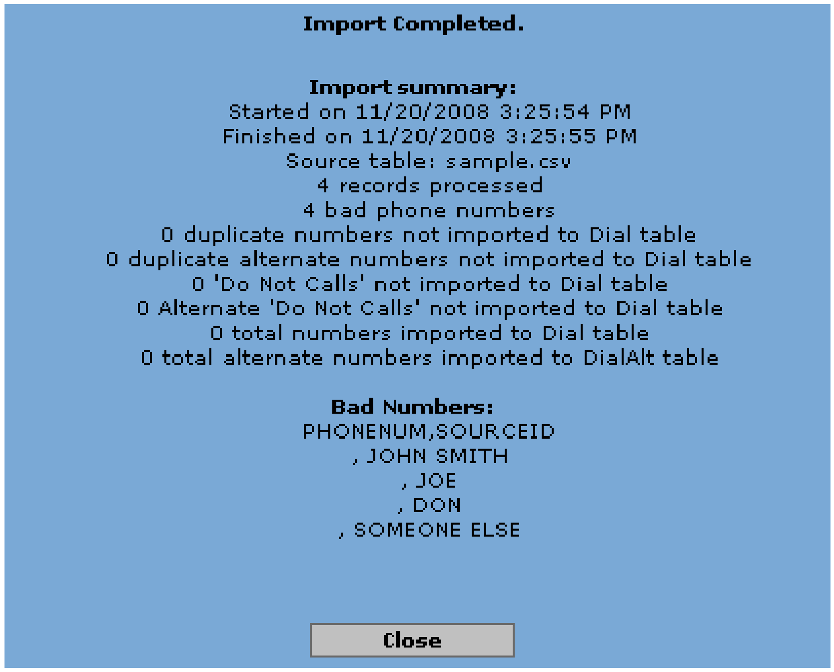
The Import area is displayed:



NOTE: After dial records are imported into a Campaign for the first time, you will have the option of removing any prior dial records from the Campaign (emptying the Campaign of any dial records) the next time you perform an import into the Campaign by placing a checkmark in front of the **Remove Prior Records** option.

2. Click on **Start Import** to perform the Import.

Once the Import is complete, an Import Summary area will be displayed:



2. Click on **Close** to exit from the Import Summary area.