ACQUEON™

LCM Console User Guide

Version 3.1

August 2014

Preface

Welcome to Acqueon, the leader in delivering reliable Computer Telephony (CT) software to the next wave of Customer Contact Centers. LCM is a powerful list-and-campaign manager that greatly enhances and accentuates the fundamental capabilities of the Unified CCE dialer. LCM manages contacts upload, selection, and rescheduling of contacts in addition to providing important campaign management features to the Cisco Unified CCE dialer. It also supports multi-channel (SMS and Email) outbound options.

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About This Manual

This manual explains the features available in the LCM application and the procedure to configure them.

Audience

This document is intended for administrators and personnel who configure the LCM application in a contact center.

Associated Documents

The following manuals/guides are also part of LCM documentation:

- **LCM Installation Guide** provides step-by-step procedure to install and configure the LCM application.
- **LCM Client User Guide** explains the features available on an agent desktop for the LCM application.
- **LCM Webservice Programming Reference Manual** explains the various methods that are exposed by the LCM Webservice.
- **LCM Hardware and Software Requirements** lists the hardware and software requirements for the LCM application.

Conventions

Window and dialog names are shown in plain type, capitalized as the names appear on-screen in the title bars. Menu names, commands, buttons, and data entry fields are shown in bold text, capitalized as they appear on-screen. Important notes are shown like this:

Note: A note is represented thus.

Chapter 1

List and Campaign Manager (LCM)

1.1 Overview

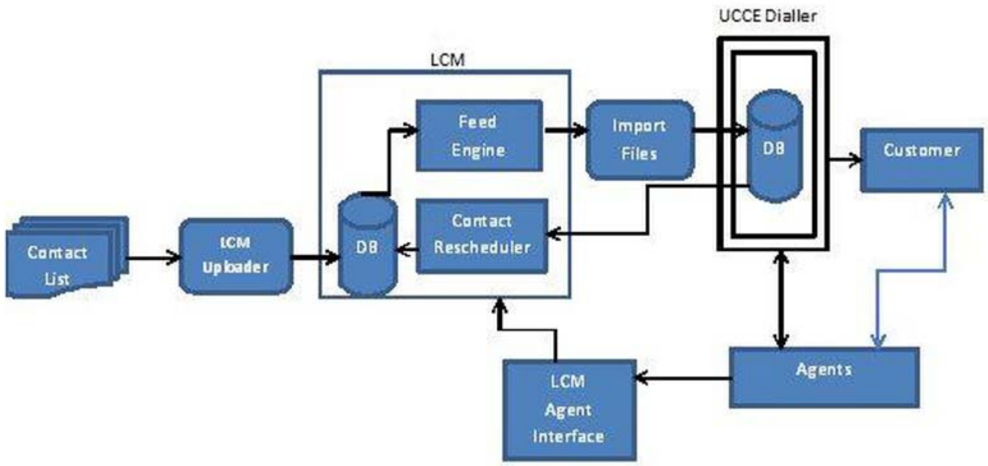
List and Campaign Management (LCM) is an application that delivers contacts to the Cisco Unified Contact Center Enterprise (Unified CCE) dialer and processes the call results. The key features of LCM are listed below:

- Create multiple sub-campaigns and map them to a single Unified CCE campaign group.
- Exhaustive call strategy for various telephony outcomes like busy, no answer, not reachable, etc.
- Agents can set business outcomes. These outcomes too can have extensive call strategy using which you can re-process or close contacts.
- Campaign chaining to re-allocate the closed contacts from a source campaign to another destination campaign, based on business requirements.
- Option to define different times, on the same day or different days, for a campaign to run.
- Additional channels like Emails and SMS to reach a contact.
- Option to distribute contacts based on the weightage assigned to dial modes.
- Assign different contact selection strategies to different times of the day for specific campaign for optimal scheduling.
- Remove unwanted contacts using the scrub option.
- Deliver contacts based on timezones.
- Support State Laws based on zip- or area code.
- Execute precall script.
- Filter contacts based on statutory compliances like DNC/NDNC/PEWC.

1.1.1 LCM Architecture with Cisco Unified CCE Dialer

Figure 1–1 illustrates the architecture of LCM with Cisco Unified CCE dialer.

Figure 1–1 LCM Architecture with Cisco Unified CCE dialer



The following points explain the architecture of LCM with Unified CCE dialer.

- The contacts are uploaded into the LCM database.
- LCM creates contact files based on filters or system conditions.
- Unified CCE reads the contact files, uploads into its database, and starts dialing.
- Unified CCE writes the dialing outcome in its database.
- If the call is patched to an agent, business outcome is written to LCM database by using LCM SDK.
- LCM reads the outcome from the Cisco database. The LCM database applies the call strategy and reschedules (or closes) the contact.
- Based on the rate at which the contacts are dialed, LCM supplies further contacts to Unified CCE.

1.1.2 LCM Console

LCM Console is an administrator module. You can use LCM Console to perform the following tasks:

- Configure application parameters
- Manage campaigns
- Manage lists
- Manage users

- Maintain call strategies and business outcomes
- Configure Email and SMS channels

1.2 Starting LCM Console

You can launch the LCM Console application from your web browser. To launch LCM Console:

1. Type **http://<IP address>/LCMConsole**, where **<IP address>** is the location on the network where the core application resides.The login page appears as shown in Figure 1–2.

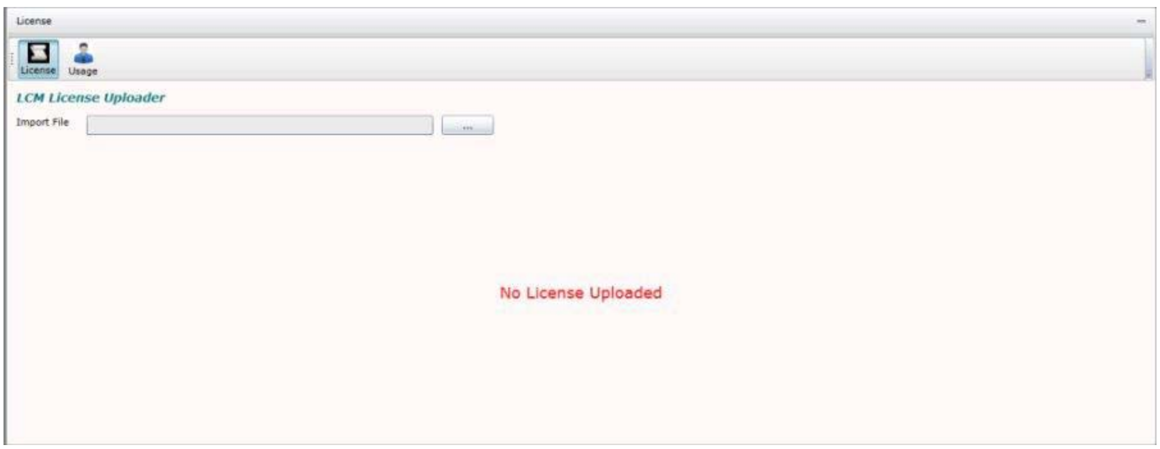
Figure 1–2 LCM Application Login Screen

2. Enter the **Username** and **Password** and click **Login**. Use the default login credentials, Username: ***admin***; Password: ***admin*** to log in to the application.
3. On successful login, you are taken to the **License** screen for uploading a license for your LCM application, as shown in Figure 1–3.

Figure 1–3 License Screen

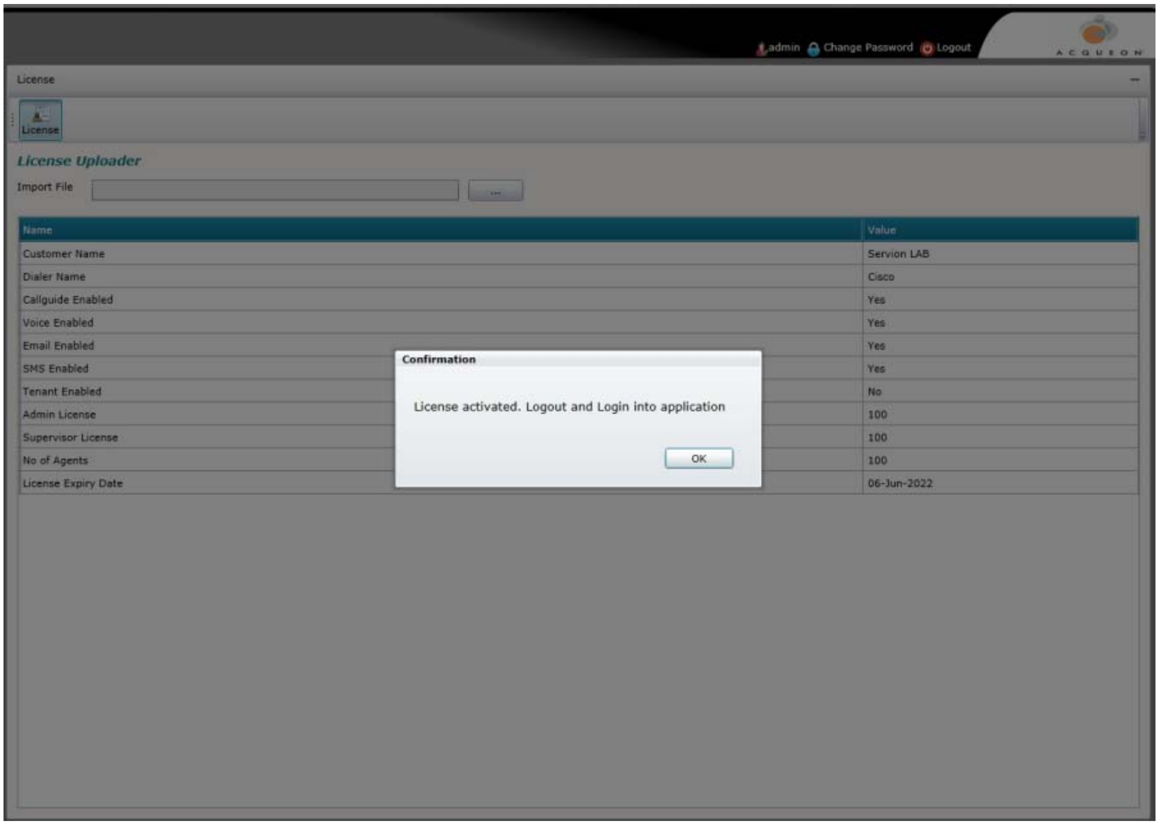
4. Click anywhere on the **License** screen to open the **LCM License Uploader** as shown in Figure 1–4.

Figure 1–4 License Uploader



5. Click the **Browse** icon alongside the **Import File** field and select the **License** file. Click **OK** to dismiss the dialog box after your license is successfully uploaded. The license details are shown in Figure 1–5.

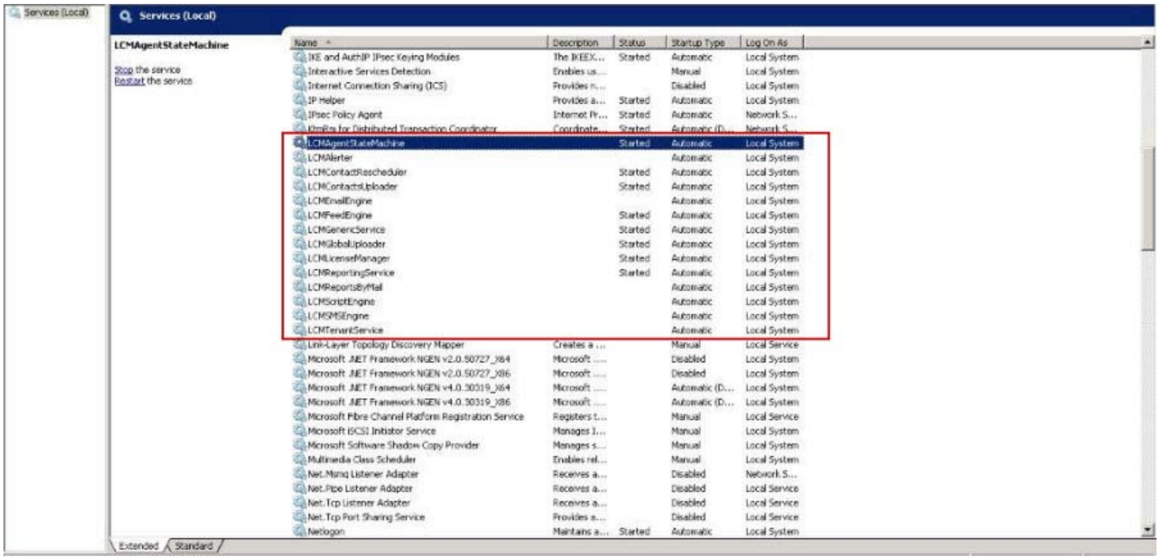
Figure 1–5 License Successfully Uploaded



6. You are logged out of the application.
7. Navigate to **Run > services.msc** on your LCM Core server to open the list of services.
8. Start all services related to your LCM application as shown in Figure 1–6. The list of services that you have start are listed below:
   - LCMLicenseManger - Start this first before you start any other LCM-related service.
   - LCMAgentStateMachine
   - LCMAlerter
   - LCMContactRescheduler
   - LCMContactsUploader
   - LCMEmailEngine
   - LCMFeedEngine
   - LCMGenericService
   - LCMGlobalUploader
   - LCMReportingService
   - LCMReportsByMail

– LCMScriptEngine
– LCMSMSEngine
– LCMTenantService - Do not start this service if the application you are using is NOT a tenanting model.

Figure 1–6 Services to be Started



9. You may now login afresh and start using your LCM Console application.

10.After successful login, your home page now has all options as shown in Figure 1–7.

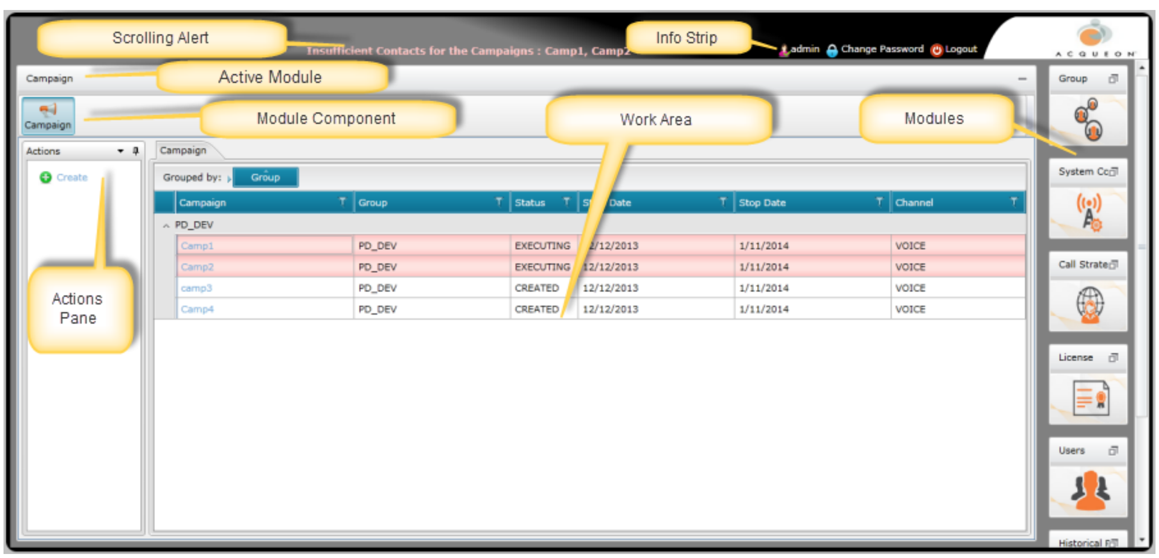
11. If any of your campaigns have insufficient contacts to process, you can see an alert scrolling across the top of your home page as shown in Figure 1–7.

Figure 1–7 LCM Application Home Page

1.2.1 Understanding LCM Console

1. Click any module to open the specific page. The LCM Console module page is displayed as shown in Figure 1–8. The look and feel of all module pages are similar.

Figure 1–8 LCM Application Main Screen



The components on the LCM Console module page are explained below:

- Action Pane: The set of actions like Add, Create, Delete, Home, etc. that you can choose from are displayed in the action pane.
- Active Module: The active module name is displayed in this area.

- Scrolling Alert: A message alerting the user that some campaign has insufficient contacts scrolls here.
- Module Components: The various components available under the module you choose. The module components are enabled based on your choice from the action pane.
- Work Area: The work area displays the configurable fields as entry areas, drop-down lists, checkboxes, etc., applicable to the module and the module component that you choose.
- Modules: The modules available in LCM Console. You can select (maximize) a module by clicking the appropriate module from the strip on the right displaying the available modules.
- Info Strip: The info strip contains the following information:
  - User Name: The logged-in user name.
  - Change Password: To change your password, click Change Password. A change password screen pops up. Enter the existing password and the new password in the fields provided and re-enter the new password for verification. Dismiss the dialog box by clicking OK to confirm your password change.
  - Logout: Click Logout to exit LCM Console.

Chapter 2

System Configuration

System Configuration is a module in LCM Console. As an administrator, you can use the System Configuration module to do the following:

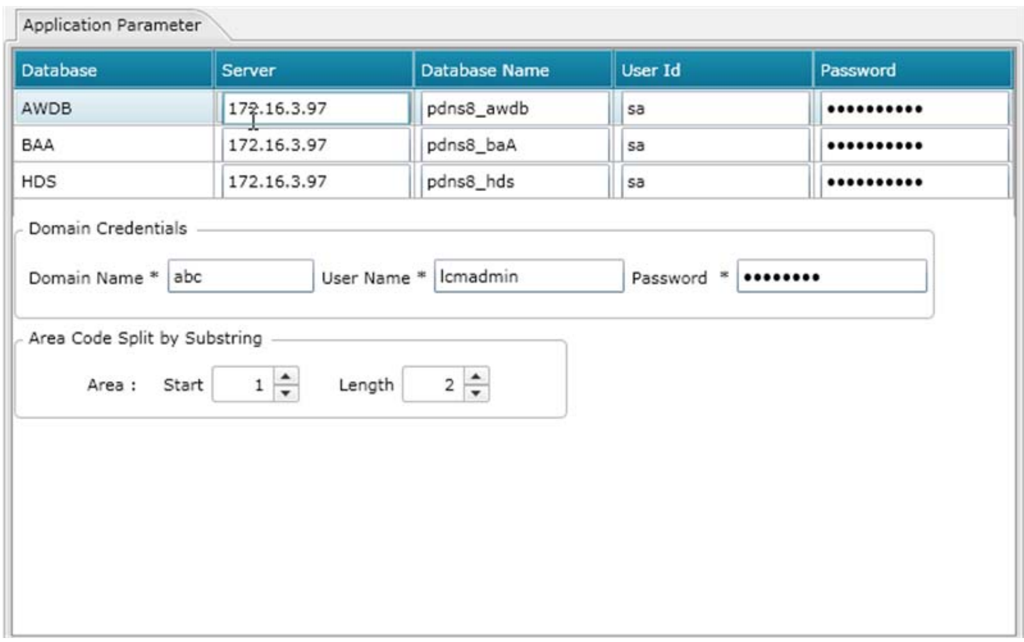
- Configure application parameters
- Upload Do Not Call (DNC)/National Do Not Call (NDNC) contacts and Prior Express Written Consent (PEWC) contacts. These come under statutory compliance.
- Create multiple calling modes like home, office, and mobile numbers
- Select a time zone in which the application delivers contacts to the dialer
- Create a list of holidays for the contact center
- Create business outcomes that define contact treatment for each outcome
- Enter or upload Area and Zip Codes
- Create State Laws to ensure your campaign adheres to statutory requirements
- Enter telephony outcomes, map them as Right Party Connect (RPC) or non-RPC, and keep count of retries
- Schedule reports to be generated and delivered to a list of recipients
- Define global upload parameters to upload contacts
- Specify any URL and browse the web page from within the application
- Create a call guide to assist agents through a call
- Set up an alerter to automate an email to an administrator if any of the configured service of the LCM application stops working
- Set up and configure an Email server for sending Emails
- Configure a gateway server for sending SMS
- Define diverse business fields as a Dimension to generate enhanced custom reports
- Create and configure Profiles to use as shortcuts to upload contacts

To start configuring the system parameters, click the **System Configuration** module in the module strip on the right of your screen.

2.1 Application Parameter

Use the **Application Parameter** module component to point to the Unified CCE dialer databases, core and application servers, and their user credentials. Click the **Application Parameter** module component to open the **Application Parameter** tab. The screen is shown in Figure 2–1.

Figure 2–1 Application Parameter



Complete the details shown in Table 2–1.

Table 2–1 Application Parameter Details

Field	Action	Description
Database	No action required.	The Unified CCE dialer database.
Server	Enter the Unified CCE dialer database server IP address.	The Unified CCE dialer database server IP address.
Database Name	Enter the Unified CCE dialer database name.	The Unified CCE dialer database name.
User Id	Enter the Unified CCE dialer database User Id.	The User Id to access the Unified CCE dialer database.
Password	Enter the password for the Unified CCE dialer database	The password to access the Unified CCE dialer database.

Note: The third entry relating to HDS as shown in Figure 2–1 is applicable only for a non-tenanting LCM model. If you are hosting a tenanting model, provide the host information for the Server, Database Name, User ID, and Password columns for the LCM database.

Complete entries for all databases that form part of your dialer.

If your LCM application has to deliver the contacts to Cisco resident in a different domain, complete the **Domain Credentials** section with details in Table 2–2.

Table 2–2 Domain Credentials Details

Field	Action	Description
Domain Name	Enter details.	The server domain name where you place contact files to the dialer
Username	Enter details.	The user name for the server to enable access to the file path
Password	Enter details.	The password for this user.

If your LCM application does not use network access, follow the steps detailed below to authenticate the LCM application to access the file path where you place files containing contact details.

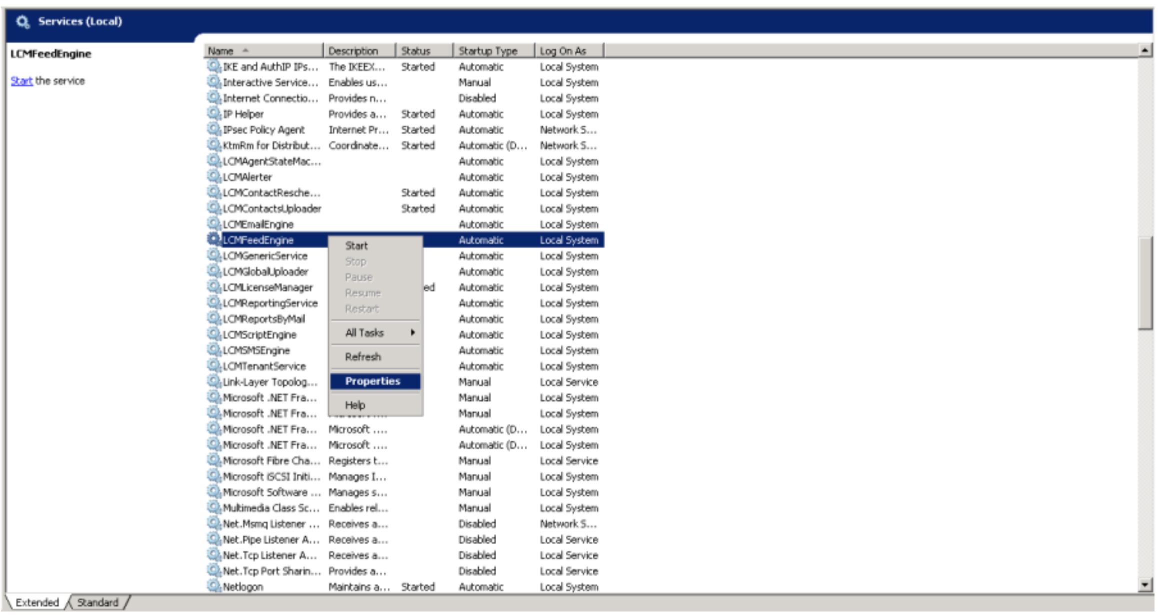
1. Navigate to **C:/Program Files/LCM/LCMFeedEngine/LCMFeedEngine.config**
2. Open the file **LCMFeedEngine.config** with a suitable text editor.
3. Navigate to the tag shown below:

```
<appSettings>
    <add key="FillContactsInSecs" value="6" />
    <add key="CampaignGroupRefreshTimeOutInSecs" value="20" />
    <add key="ICMVersion" value="7" />
    <add key="ClientSettingsProvider.ServiceUri" value="" />
    <add key="LanguageCode" value="65001" />
    <add key="EODProcessTime" value="20:00:00" />
    <add key="NetworkCopyAcces" value="true" />
    <add key="DecrementThresholdInPercentage" value="5" />
    <add key="UpperThresholdPercentage" value="200" />
    <add key="LCMDeliverContacts" value="C:\LCMContact\" />
    <add key="AutoFlushOnEOD" value="true" />
    <add key="UseCampaignDN" value="true" />
    <add key="ClearOnCampaignSuspend" value="true" />
    <add key="DialerType" value="UCCE" />
    <add key="PCBContactsPushCount" value="1000" />
    <add key="AgentMappingContactsPushCount" value="1" />
    <add key="LicenseMaxTry" value="5" />
    <add key="EnableAccountMapping" value="True" />
    <add key="PCBTimeInMin" value="30" />
```

```
    <add key="CallbackDeliveryType" value="DB" />
    <add key="UseCampaignDNForAgentSpecficCampaign" value="true"/>
  </appSettings>
```

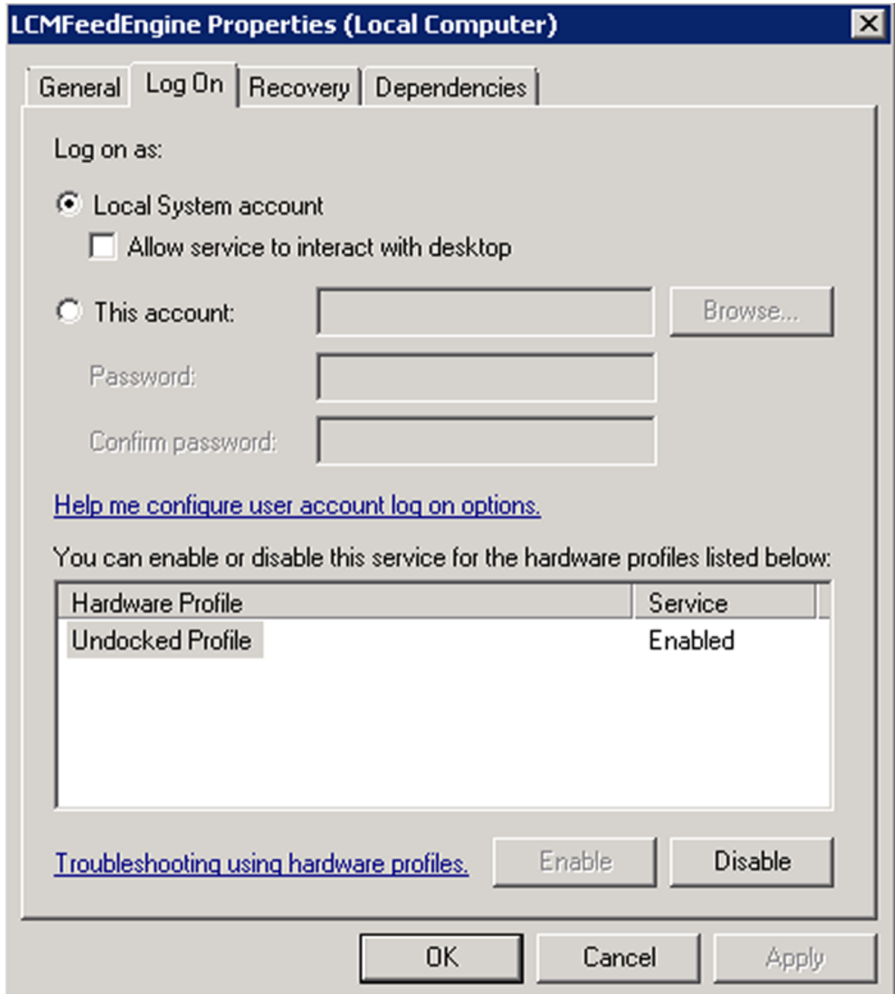
4. For key **<add key="NetworkCopyAcces" value="true" />**, change the value = "**false**" (this key is highlighted in red in the tag above).
5. Save the file and exit the editor.
6. Navigate to **Start > Run > services.msc** to open the **Services** window.
7. In the **Services** window, right-click the **LCMFeedEngine** service as shown in Figure 2–2.

Figure 2–2 LCM Feed Engine



8. Click **Properties** to open the **LCMFeedEngine Properties (Local Computer)** window as shown in Figure 2–3. Stop the service and make changes to the service properties.

Figure 2–3 LCMFeedEngine Properties



9. Select the **This account:** button and enter the domain name (or click **Browse** to select the domain). Complete the details below:

   – **Password**: Enter a password to access the domain.

   – **Confirm password**: Re-enter the password to confirm.

10. Click **OK**.

11. In the **Services** window, right-click the **LCMFeedEngine** service. Click **Start** to start the service.

If required, configure the **Area Code Split by Substring** section. See Area Code Split by Substring for more details.

2.1.1 Area Code Split by Substring

To configure how the area code for your contact is defined, complete the fields shown in Table 2–3.

Table 2–3 Area Code Split by Substring

Field	Action	Description
Start	Select from drop-down list.	The first character in the phone number from where the area code starts. For example, if your contact details contains 18 characters and the characters 5–10 indicate the area code, select 5.
Length	Select from drop-down list.	The length of the area code in the phone number. For example, if your contact details contains 18 characters, and the area code is 6 characters long, from characters 5–10, select 6.

Click **Save** in the **Actions** pane to complete **Application Parameter** only after you have completed details in Table 2–1 (and Table 2–3, if you are configuring the area code). A dialog box confirming the save disappears automatically.

To edit any **Application Parameter**, double-click the cell you want to edit. In the edit mode, make the required changes and click **Save** in the **Actions** pane.

2.2 Compliance

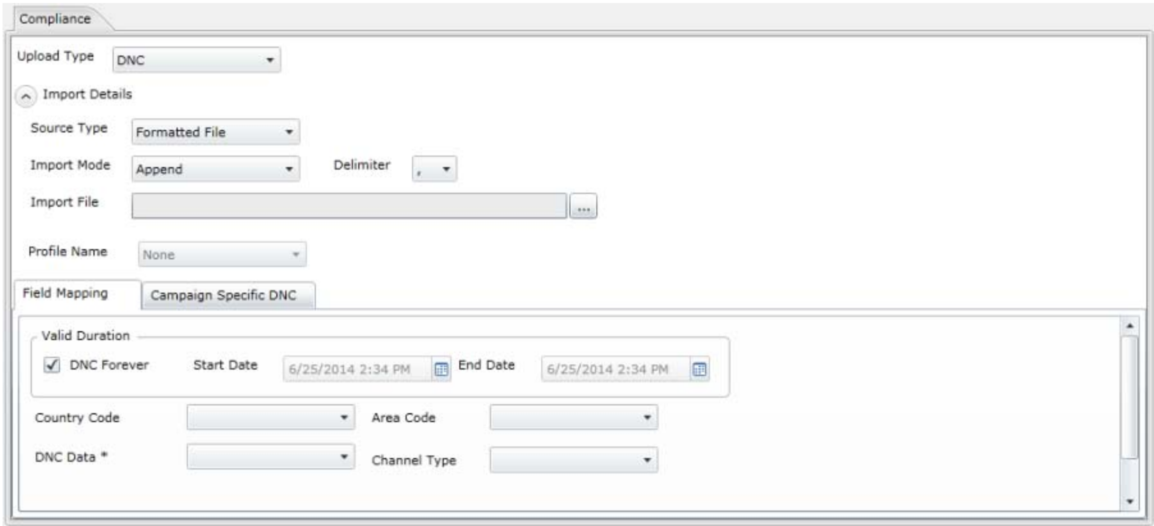
The Compliance module component deals with various statutory compliances listed below:

- DNC expands to Do Not Call. 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 is a 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 shall make an unsolicited call or send an unsolicited SMS.
- PEWC is Prior Express Written Consent. This compliance mandates that telemarketers obtain the prior express written consent of the called party for autodialed or prerecorded telemarketing calls to wireless numbers and prerecorded calls to residential landlines.

You can use the **Compliance** module component to upload DNC/NDNC/PEWC contacts

Click the **Compliance** module component to open the **Compliance** tab as shown in Figure 2–4.

Figure 2–4 Compliance



Configure the **Compliance** tab by completing the fields as described in Table 2–4.

Table 2–4 Compliance Contact Upload - Settings

Field	Action	Description
Upload Type	Select from drop-down list.	The type of contacts to upload. Select from: • DNC • NDNC • PEWC
Import Details		
Source Type	Select from drop-down list	The type of file to upload. • **Formatted File**· Upload contacts from a character-delimited flat file. **Note:** You can upload DNC/NDNC/PEWC contacts from a Formatted File. • **Database Table**· Upload contacts from a database table. • **Database View**· Upload contacts from a database view. **Note:** You can upload only PEWC data from a Database Table or View.

Field	Action	Description
Import Mode	Select from drop-down list.	The import mode defines what happens to the imported DNC/NDNC/PEWDC records. • **Append**· Appends records to an existing DNC/NDNC/PEWDC list. • **Overwrite**· Clears the existing list and appends new records to the list. • **Delete**· Deletes, from the DNC/NDNC/PEWDC list, records that match entries in the upload file.
Formatted File Upload		
Delimiter	Select from drop-down list.	The delimiter used in the DNC/NDNC/PEWDC file that is uploaded. **Note:** Upload fails if your file contains a delimiter other than as in the drop-down list.
Import File	Browse to select the path where the file to be uploaded is located.	The path where the DNC/NDNC/PEWDC upload file is located.
Upload Type	Select from drop-down list	The upload type that you want to map. Available options are **DNC**, **NDNC**, and **PEWC**.
Profile Name	Select from drop-down list.	The profile name for this configuration.You can use this later for easier file upload.
Database Table/View Upload **Note:** Only SQL Authentication is supported for PEWC uploads from a Database Table/View.		
Server Name	Enter a value.	The server name or the IP address where the database containing the contacts for upload is placed.
Database Name	Enter a value.	The database name where the table containing contacts for upload is available.
Username	Enter a value.	The database username where the table containing contacts for upload is available.
Password	Enter a value.	The password for accessing the database where the table containing contacts for upload is available. **Note:** Before proceeding further, click the **Connect** button to connect to the database using the credentials provided.

Field	Action	Description
Table Name	Select from drop-down list.	The table name where the contacts for upload are placed. **Note:** Enter a **View Name** instead of a **Table Name** if you intend uploading contacts from a database view.
Profile Name	Select from drop-down list.	The profile name, configuration as per which contacts in this file are uploaded.
Field Mapping - DNC/NDNC		
DNC Forever	Select checkbox.	Select to mark these contacts permanently DNC.
Start Date	Select from calendar.	The date from which the contact becomes a DNC contact.
End Date	Select from calendar.	The date from which the contact ceases to be a DNC contact.
Country Code	Select from drop-down list.	A country code (optional) applicable to the number being marked as a DNC contact.
Area Code	Select from drop-down list.	An area code (optional) applicable to the number being marked as a DNC contact.
DNC Data	Select from drop-down list.	The data to be marked as a DNC contact.
Channel Type	Select from drop-down list.	The channel type that you want to map.

See Figure 2–5 for Field Mapping if you upload from a Database Table/View.

Figure 2–5 Field Mapping - PEWC

Complete the details in Table 2–5 to map fields when uploading PEWC data.

Table 2–5 Field Mapping Details - PEWC

Field	Action	Description
Country Code	Select from drop-down list.	A country code (optional) applicable to the number being marked as a DNC contact.
Area Code	Select from drop-down list.	An area code (optional) applicable to the number being marked as a DNC contact.
PEWC Data	Select from drop-down list.	The field in the table containing the PEWC data.
Profile Execution Time	Select from pop-up time panel.	The time that the application connects to the database and uploads PEWC data from the database. **Note:** This is applicable only if you are uploading data from a Database Table/View.

Click the **Campaign Specific DNC** to open the tab as shown in Figure 2–6.

Note: **Campaign Specific DNC** is applicable only for DNC/NDNC contact uploads.

Figure 2–6 Campaign Specific DNC

If the uploaded DNC contact is applicable to select campaigns, select the **Enable Campaign-Wise Upload DNC** checkbox, and then select the appropriate checkboxes to which this uploaded DNC is applicable.

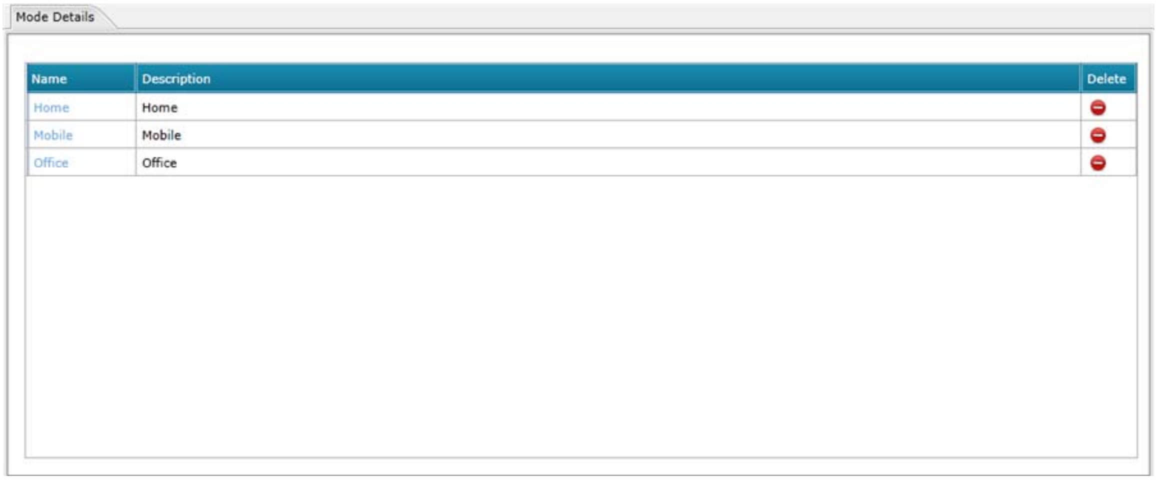
Note: If you do not select this checkbox, the uploaded contact will be marked as DNC across all campaigns.

Click **Upload** in the **Actions** pane to upload the **Compliance** data. Click **Clear** in the **Actions** pane to clear any data without uploading.

2.3 Mode

A mode is a medium you use, like a telephone or an Email, to reach a contact. You can configure multiple modes for a contact in LCM Console. For example, a contact may have telephone numbers at home and at office, and a mobile number. Each of these numbers is a mode to reach the same contact. You can configure the modes in this module component. Click the **Mode** module component. The **Mode Details** tab is shown in Figure 2–7.

Figure 2–7 Modes Configured



To add another mode to reach a contact, click **Create** in the **Actions** pane on the left. The **Mode Details** tab, enabled to add a new mode, is shown in Figure 2–8.

Figure 2–8 New Mode Creation

Complete the fields as shown in Table 2–6. When you are done entering the fields, click **Save** in the Actions pane. The refreshed **Mode Details** tab displays the mode you created.

Table 2–6 Mode Details Configuration

Field	Action	Description
Mode Name	Enter data.	A name for the mode you are creating.

Field	Action	Description
Mode Description	Enter data.	A description for the mode you are creating.
Numeric	Select checkbox.	Selecting this means the mode is only a telephonic contact. **Note:** Complete the **Minimum Length** and **Maximum Length** fields if you select this checkbox.
Minimum Length	Select from number panel.	The minimum length of the contact number in this mode. **Note:** The **Minimum Length** should be one or higher.
Maximum Length	Select from number panel.	The maximum length of the contact number in this mode. **Note:** The **Maximum Length** should be between 1 and 99.

Click **Save** in the **Actions** pane to save the records.

To edit a mode, click a **Mode** and change the desired fields. Click **Save** in the **Actions** pane to save the changes.

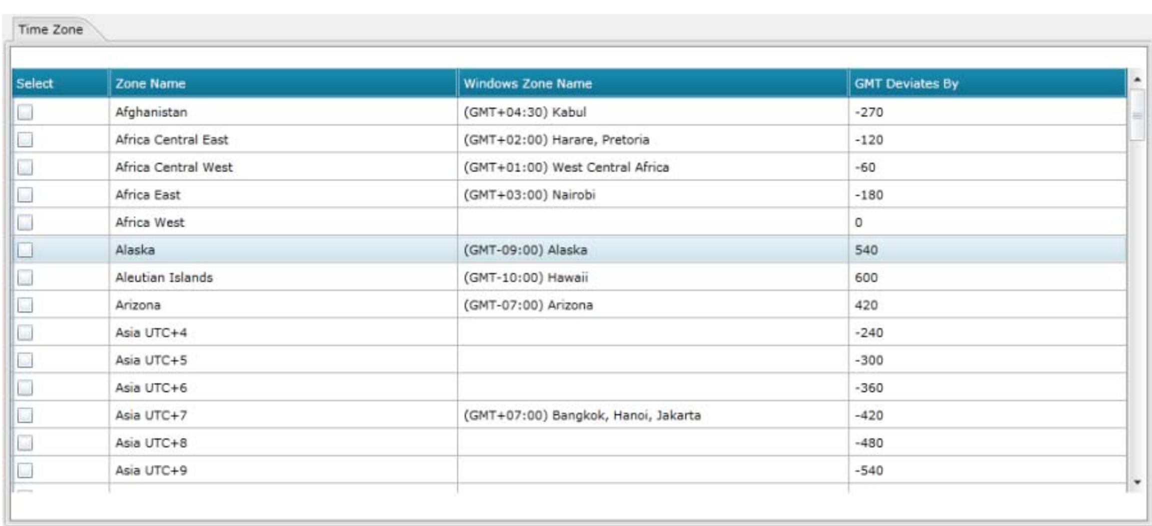
To delete a mode, click the **Delete** icon corresponding to the mode you want to delete. The mode is deleted and the active modes are displayed in the work area.

Note: You cannot a delete a mode to which you have attached a call strategy.

2.4 Time Zone

The **Time Zone** module component lists the time zones available for selection. Click the **Time Zone** icon in the Module Component. The **Time Zone** tab is shown in Figure 2–9.

Figure 2–9 Time Zone



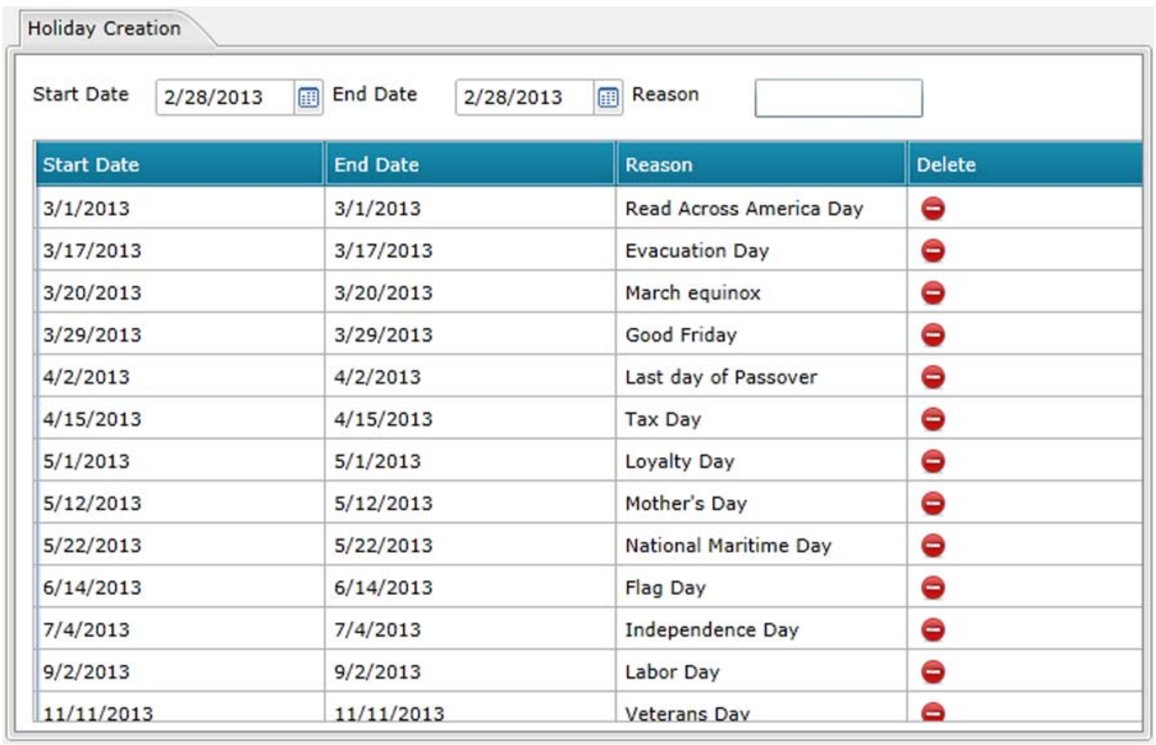
Select	Zone Name	Windows Zone Name	GMT Deviates By
	Afghanistan	(GMT+04:30) Kabul	-270
	Africa Central East	(GMT+02:00) Harare, Pretoria	-120
	Africa Central West	(GMT+01:00) West Central Africa	-60
	Africa East	(GMT+03:00) Nairobi	-180
	Africa West		0
	Alaska	(GMT-09:00) Alaska	540
	Aleutian Islands	(GMT-10:00) Hawaii	600
	Arizona	(GMT-07:00) Arizona	420
	Asia UTC+4		-240
	Asia UTC+5		-300
	Asia UTC+6		-360
	Asia UTC+7	(GMT+07:00) Bangkok, Hanoi, Jakarta	-420
	Asia UTC+8		-480
	Asia UTC+9		-540

Select appropriate checkboxes for time zones that your campaigns run in. Click **Save** in the **Actions** pane to save the selection. A dialog box at the bottom of the tab confirms the change, and automatically closes in a few seconds.

2.5 Holidays

You can specify holidays by using the **Holidays** module component. Click the **Holidays** module component to open the **Holiday Creation** tab, listing all holidays created, as shown in Figure 2–10.

Figure 2–10 Holiday Creation



Complete the fields as shown in Table 2–7 to create a new holiday.

Table 2–7 Holiday Creation

Field	Action	Description
Start Date	Select from calendar.	The start date for a holiday.
End Date	Select from calendar.	The end date for a holiday.
Reason	Enter data.	The reason for the holiday.

Click **Create** in the **Actions** pane. The holiday you created appears in the holiday listed in the work area. The dialog box confirming the new holiday disappears automatically.

Click **Clear** in the **Actions** pane to clear any data without saving.

To delete a holiday, click the **Delete** icon corresponding to the holiday you want to delete. The holiday is deleted and the active holidays are displayed in the work area.

Note: You can only specify holidays using this module component. See Holidays on how to attach these holidays to specific campaigns or states.

Note: If the holiday you assign to a campaign are 7 days or longer, the contacts rescheduled for the last 7 days of the holiday are expired from dialing. For example, if you have assigned holidays from 07/15/2012 to 07/25/2012, the contacts rescheduled from 07/16/2012 to 07/18/2012 are expired from dialing. You have to reschedule these expired contacts. See Reschedule/Reset Contacts on how to reschedule expired contacts.

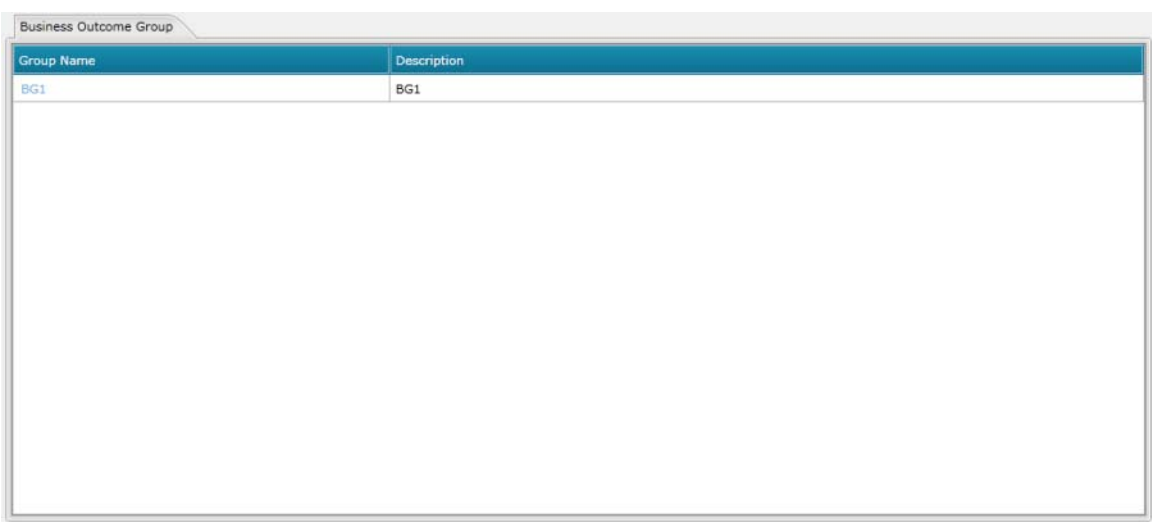
2.6 Business Outcome Group

You can configure business outcomes on LCM Console. A business outcome is the disposition set by an agent based on the result of an interaction with a customer. By configuring a business outcome, you can define what happens to the contact after a call.

For 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 set the 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.

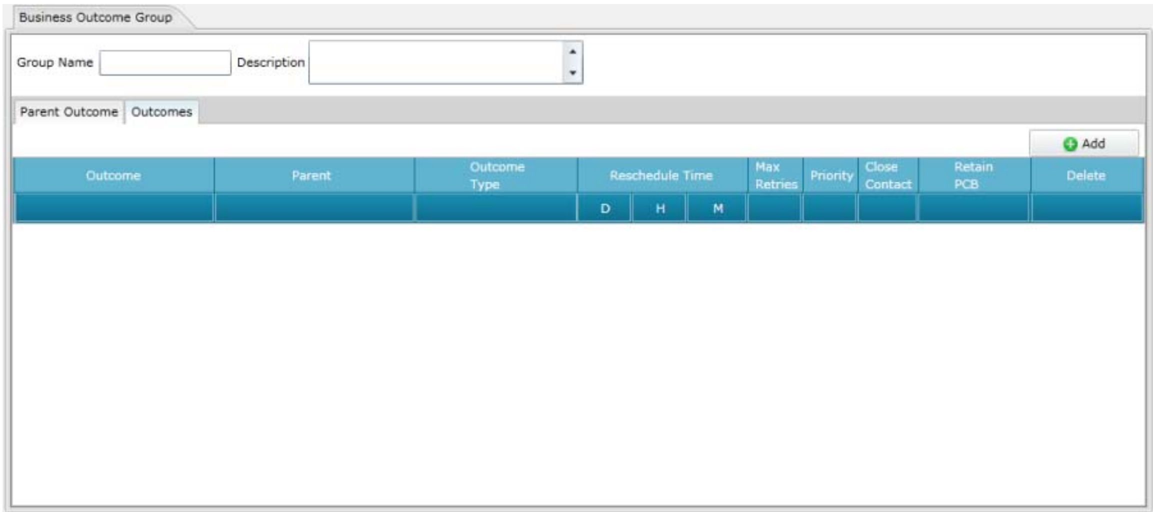
Click the **Business Outcome Group** module component to open the **Business Outcome Group** tab as shown in Figure 2–11. The configured business outcomes are listed here.

Figure 2–11 Business Outcome



To create a new business outcome group, click **Create** in the **Actions** pane. A screen opens in the work area as shown in Figure 2–12.

Figure 2–12 Creating a Business Outcome



Complete the fields as shown in Table 2–8 to start configuring the business outcome.

Table 2–8 Business Outcome Groups

Field	Action	Description
Group Name	Enter a Group Name.	A name for the business outcome group.
Description	Enter a description.	A description of the business outcome group.

Click the **Add** icon after entering the description. The **Add** icon is on the top right of the work area. Complete the fields, first for the **Parent Outcome** tab and then for the **Outcomes** tab as shown in Table 2–9 to configure the business outcome.

Note: Mapping outcomes to Parent Outcomes limits the display of outcomes for an agent to select from, making navigation and selection easy. Only outcomes associated to the chosen parent are displayed.

Table 2–9 Business Outcome Configuration Details

Field	Action	Description
Parent Outcome		
Group Name	Enter a name.	A name for the business outcome.
Description	Enter a description.	A description of the business outcome.
Outcome		

Field	Action	Description
Outcome	Enter an outcome.	An outcome for the business outcome being configured. For example, Agreed to Pay, Declined to Pay, Making a Part Payment, etc.
Parent	Select from drop-down list.	Select a Parent outcome for this business outcome.
Outcome Type	Select from drop-down list.	Applicable Outcome type. Select from: • Success - This marks your outcome as a successful outcome. • Failure - This marks your outcome as a failed outcome.
Reschedule Time	Enter the reschedule details.	The reschedule details for the business outcome.
Day(s)	Enter the number of days.	The number of days by which you want to reschedule the contact.
Hour(s)	Enter the number of hours.	The number of hours by which you want to reschedule the contact.
Minute(s)	Enter the number of minutes.	The number of minutes by which you want to reschedule the contact.
Max Retries	Enter the maximum retries for this contact.	The number of retries you want to allow for this business outcome.
Priority	Enter a number to increase/decrease priority for this outcome.	The priority adjustment you make for this business outcome.
Close Contact	Select checkbox to close contact.	This business outcome closes the contact and will not be delivered to the Unified CCE dialer again.
Retain PCB	Select checkbox.	This selection sets a personal callback for this outcome.
Delete	Select checkbox to delete business outcome.	The business outcome is deleted from the Business Outcome Group.

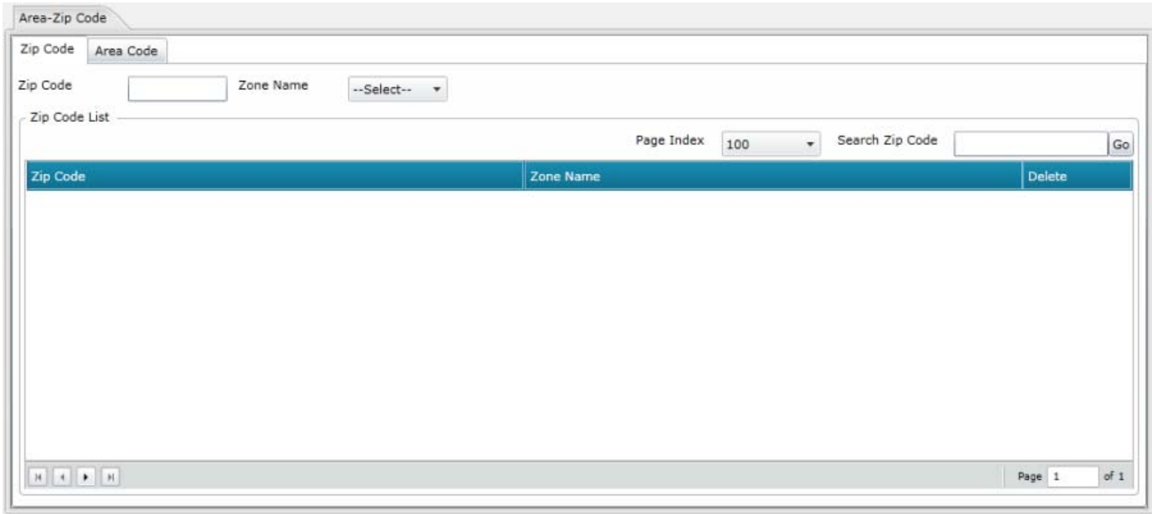
Click **Save** in the **Actions** pane to save the **Business Outcome Group**.

To delete a **Business Outcome Group**, click **Delete** in the **Actions** pane.

2.7 Area-Zip Code

You can have master data of Area Codes and Zip Codes in LCM Console. You can use this data to associate to state laws, thereby defining areas where state laws are applicable. Click the **Area-Zip Code** icon on the module component to see the **Area-Zip Code** tab as shown in Figure 2–13.

Figure 2–13 Area-Zip Code



Complete the fields as shown in Table 2–10 to add zip codes.

Table 2–10 Area-Zip Code Details

Field	Action	Description
Zip (Area) Code	Enter a Zip (Area) Code.	The zip (area) code which you want to add.
Zone Name	Select from drop-down list.	The zone in which zip code is located.

Click **Create** in the **Actions** pane to create the zip code. This zip code now appears in the **Area-Zip Code** tab.

Note: To enter an area code, click the **Area Code** tab from Figure 2–13 and enter the details as in Table 2–10. Click **Create** to create the record.

Click **Clear** in the **Actions** pane to abort entry of a new area or zip code at any time before creating the record.

Click the **Delete** icon against each entry to delete unwanted area (or zip) codes from the **Area-Zip Code** tab.

Note: You cannot a delete a zip or area code if associated to a state law.

Use the **Page Index** field to configure the number of codes to list in one page. The **Search Zip (Area) Code** searches for the entered string and displays the top results - this number is same as you configure in the **Page Index** field.

2.7.1 Uploading Area-Zip Codes

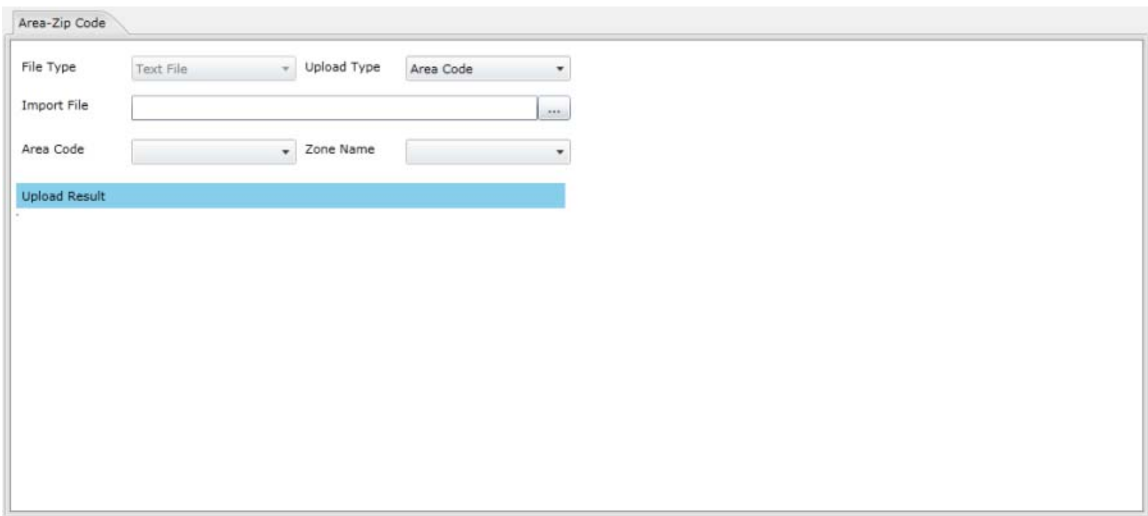
You can also upload area or zip codes in bulk from a file.

Your upload file should be comma-separated (CSV) text file. You can have two separate files, one each for Area Code upload and one for Zip Code upload. You could also have Area Code, Zip Code, and Zone Name in one CSV file and upload Area and/or Zip codes separately using the same file.

Note: The Zone Name field in your upload file is the Time Zone that you have configured in 2.4 Time Zone. The zone names that you wish to upload should exactly match the ones that you have configured.

Click **Upload** in the **Actions** pane to upload data from a file. See Figure 2–14.

Figure 2–14 Area-Zip Code Upload



Complete the fields as shown in Table 2–11 to upload area/zip codes.

Table 2–11 Area-Zip Code Upload Details

Field	Action	Description
File Type	No action required.	You can upload only text files.
Upload Type	Select from drop-down list.	The code you want to upload. Select from • Area Code to upload area codes • Zip Code to upload zip codes
Import File	Enter a path or select the location of the text file by clicking the **Browse** button.	The path where your text file is available for upload.

Field	Action	Description
Area (Zip) Code	Select from drop-down list.	The code you want to upload. Select from • Area Code to upload area codes • Zip Code to upload zip codes
Zone Name	Select from drop-down list.	The zone to which this area or zip code is associated.

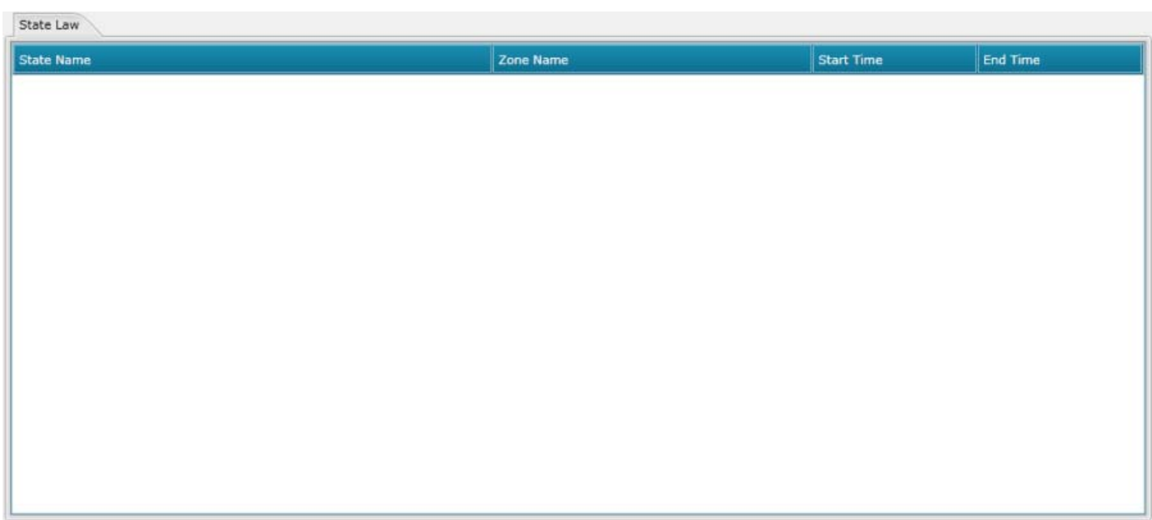
Click **Upload** in the **Actions** pane to upload the area/zip code data.

2.8 State Law

Various geographical regions like states, countries, etc. have laws that regulate contact center operations. You can configure these state laws in LCM Console to ensure that your contact center operations adhere to the statutes of the geographical regions they operate in. For example, 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 your LCM Console 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.

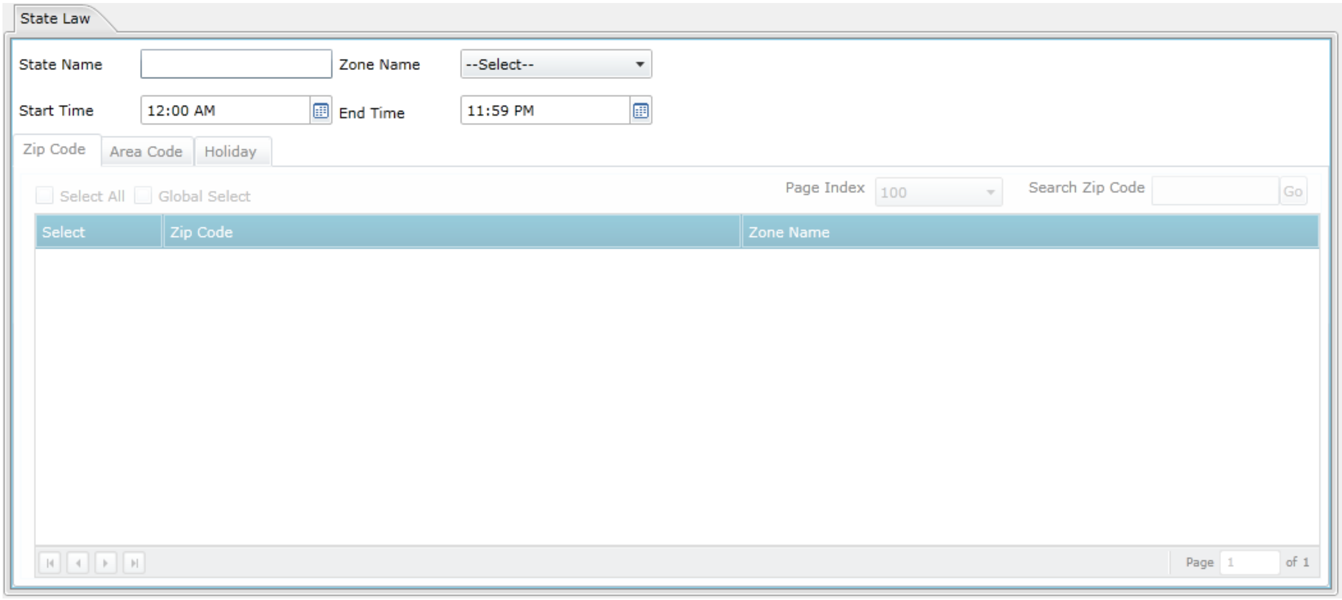
Click the **State Law** module component. The configured state laws are shown as in Figure 2–15.

Figure 2–15 State Law



Click **Create** in the **Actions** pane to create a new **State Law** to see the screen as shown in Figure 2–16.

Figure 2–16 Create State Law



Complete the fields as shown in Table 2–12 to start configuring a state law.

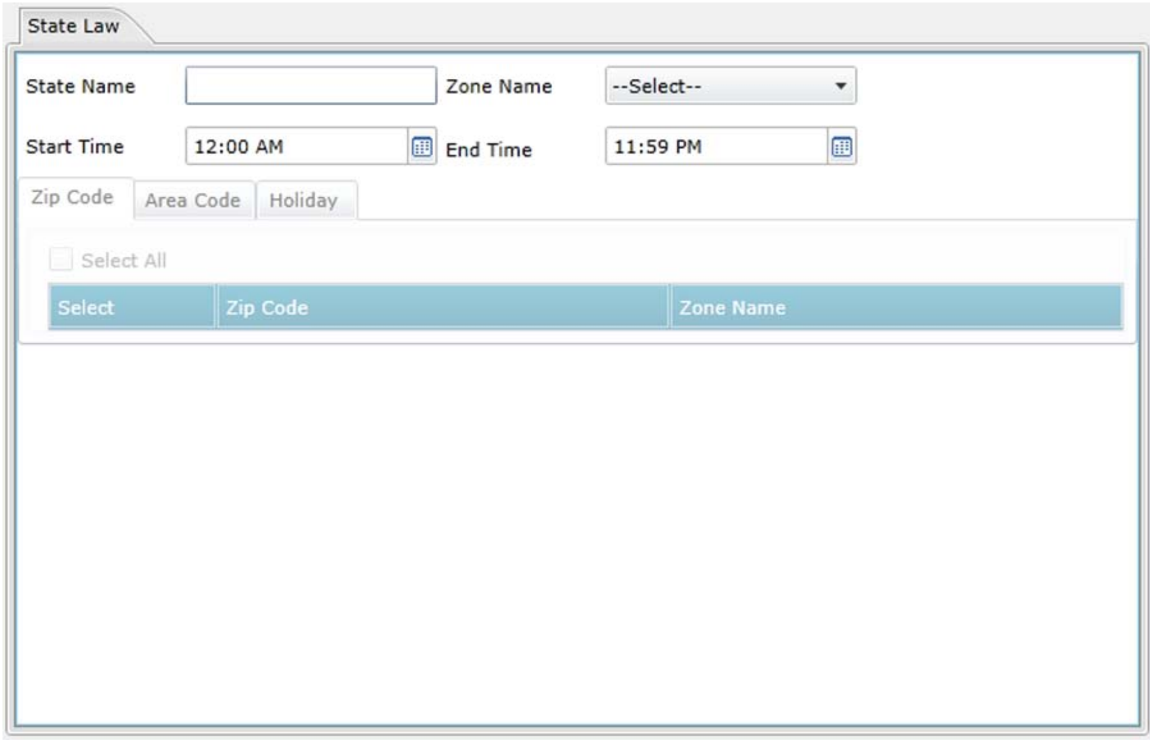
Table 2–12 State Law

Field	Action	Description
State Name	Enter a State Name.	A state name for which you are configuring a state law.
Zone Name	Select from drop-down list.	The zone in which the state is located.
Start Time	Select a time from the popup time panel.	The time at which the state law will be effective from, that is, the time from when dialing contacts commences.
End Time	Select a time from the popup time panel.	The time at which the state law will cease to have effect, that is, the time from when dialing contact stops.

Click **Save** to complete configuring the **State Law**.

After you have created a **State Law**, you can map appropriate zip codes, area codes, and holidays. See Figure 2–17 showing the tabs to configure zip codes, area codes, and holidays.

Figure 2–17 State Law - Configure Details



Navigate to each of the tabs - **Zip Code**, **Area Code**, and **Holidays**. The available items are displayed for you to configure. Select the appropriate checkboxes to configure these items to this state law.

Note: You can configure zip codes and area codes to only one state.

Use the **Page Index** field to configure the number of codes to list in one page. The **Search Zip (Area) Code** searches for the entered string and displays the top results - this number is same as you configure in the **Page Index** field.

To delete a **State Law**, click the **Delete** icon in the **Actions** pane. A dialog box confirming the deletion will automatically disappear.

2.9 RPC/Attempts Counter

Use the **RPC/Attempts Counter** module component to assign outcome types to the pre-configured telephony outcomes and, simultaneously, keep a count of the retries for the assigned telephony outcomes.

Assign either of the following outcomes:

- **RPC**: Right Party Contact is the telephony outcome when you can confirm that the person you intended to contact has responded to your voice call.

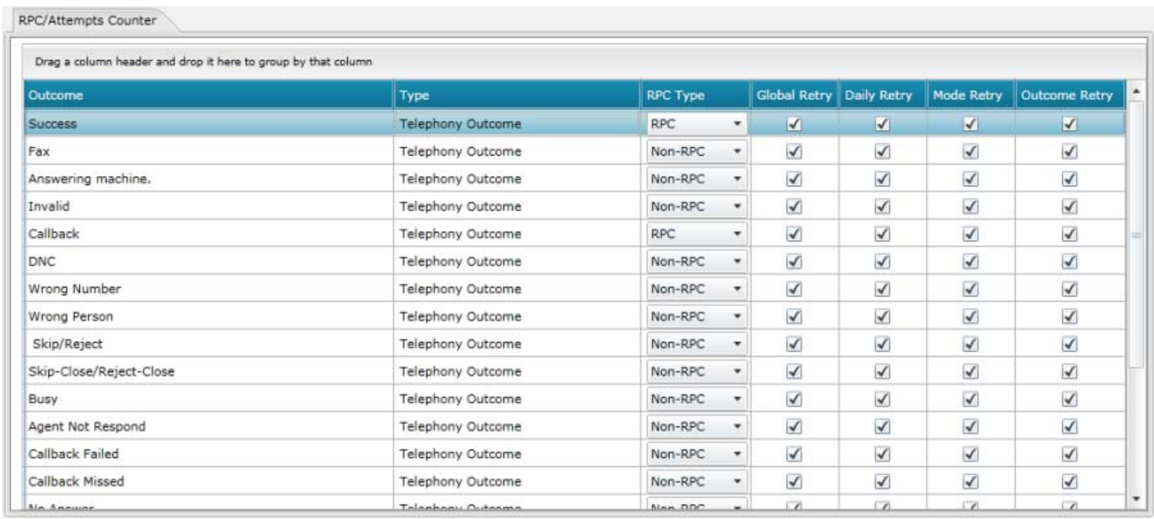
- **Non-RPC**: This is the telephony outcome when you voice call is not answered by the intended person. For example, the call may be answered by an answering machine, elicit no reply, or go to a fax mode, etc.

For each outcome, you also have the option of incrementing the retry count for all types of retries available, viz., Global, Daily, Mode, and Outcome.

Note: You cannot create any new telephony outcome. You can only change the assigned outcome type from RPC to Non-RPC or vice versa.

Click the **RPC/Attempts Counter** icon on the module component to open the **RPC/Attempts Counter** tab as shown in Figure 2–18.

Figure 2–18 RPC/Attempts Counter



RPC/Attempts Counter

Drag a column header and drop it here to group by that column

Outcome	Type	RPC Type	Global Retry	Daily Retry	Mode Retry	Outcome Retry
Success	Telephony Outcome	RPC	✓	✓	✓	✓
Fax	Telephony Outcome	Non-RPC	✓	✓	✓	✓
Answering machine.	Telephony Outcome	Non-RPC	✓	✓	✓	✓
Invalid	Telephony Outcome	Non-RPC	✓	✓	✓	✓
Callback	Telephony Outcome	RPC	✓	✓	✓	✓
DNC	Telephony Outcome	Non-RPC	✓	✓	✓	✓
Wrong Number	Telephony Outcome	Non-RPC	✓	✓	✓	✓
Wrong Person	Telephony Outcome	Non-RPC	✓	✓	✓	✓
Skip/Reject	Telephony Outcome	Non-RPC	✓	✓	✓	✓
Skip-Close/Reject-Close	Telephony Outcome	Non-RPC	✓	✓	✓	✓
Busy	Telephony Outcome	Non-RPC	✓	✓	✓	✓
Agent Not Respond	Telephony Outcome	Non-RPC	✓	✓	✓	✓
Callback Failed	Telephony Outcome	Non-RPC	✓	✓	✓	✓
Callback Missed	Telephony Outcome	Non-RPC	✓	✓	✓	✓

From the **Outcome** column, click an outcome. Select the **RPC Type** from the drop-down list that contains **RPC** and **Non-RPC** as the options.

You can also increment the various retry types for this outcome - select the checkboxes corresponding to the retry types that need incrementing. The available retry types are:

- Global Retry
- Daily Retry
- Mode Retry
- Outcome Retry

Click **Save** in the **Actions** pane to save the changes.

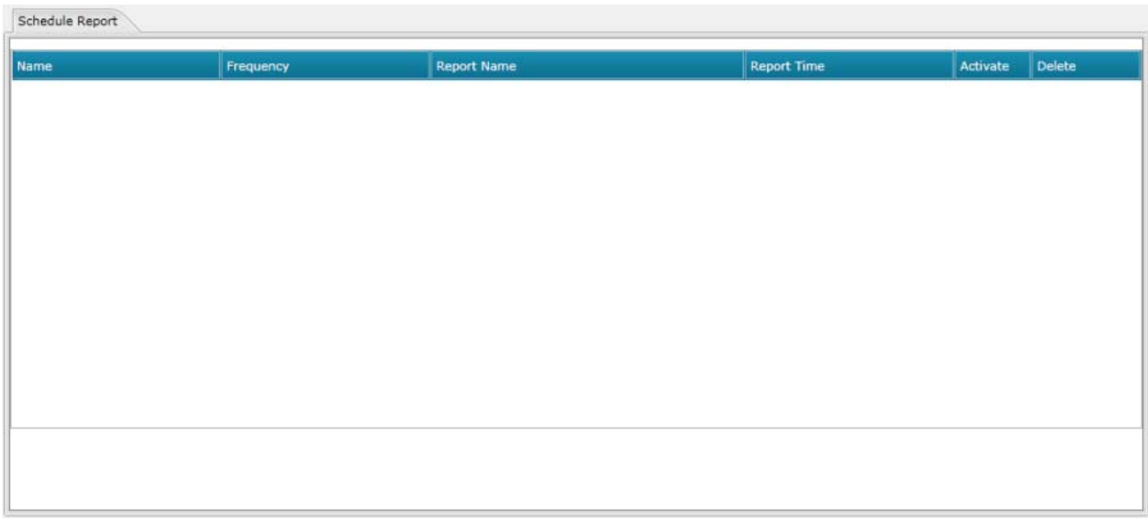
2.10 Schedule Report

As with any application, LCM has a suite of reports that users can view based on the roles assigned.

LCM Console enables scheduling of reports. Besides scheduling reports, you can select who gets to see which report and when.

Click the **Schedule Report** icon on the module component to see the configured reports as shown in Figure 2–19.

Figure 2–19 Schedule Report



Click **Create** in the **Actions** pane to configure a new report schedule. The **Schedule Report** tab displays the details to be configured as shown in Figure 2–20. Complete the details as shown in Table 2–13.

Figure 2–20 Schedule Report

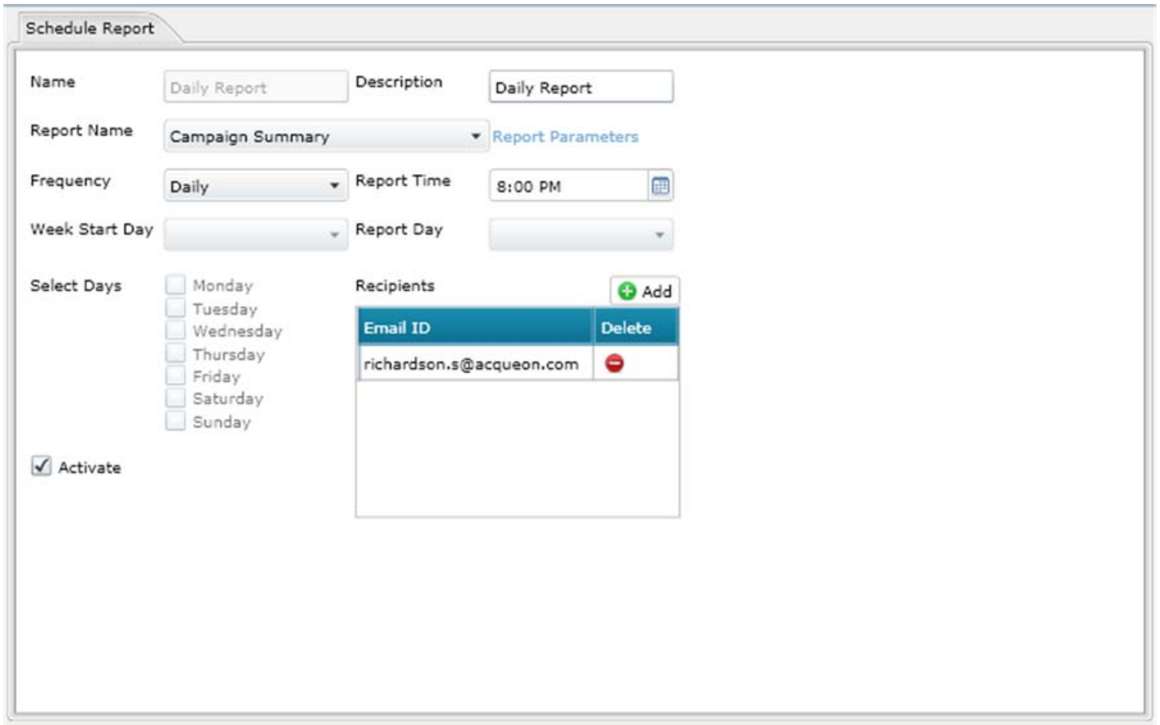


Table 2–13 Schedule Report Details

Field	Action	Description
Name	Enter a name.	The name for a schedule.
Description	Enter a description.	The description for a schedule.
Report Name	Select from drop-down list.	Select a report from those available in the drop-down list.
Frequency	Select from drop-down list.	Select the report frequency at which you want to schedule the report from the drop-down list. Applicable Frequency. Select from: • **Daily** - Report sent daily. • **Specific Days** - Report sent on specific days of the week. Select from **Select Days** checkboxes. • **Weekly** - Report sent once a week. • **Monthly** - Report sent once a month, on the first of each month.
Report Time	Select from popup time panel.	Select the time at which you want to schedule the report.

Field	Action	Description
Week Start Day	Select from drop-down list.	The report will be scheduled starting from the weekday scheduled.
Report Day	Select from drop-down list.	The report will be generated for the weekday selected. For example, if your Week Start Day is Tuesday, and your Report Day is Monday, reports for Monday will be generated and delivered on Tuesday to the configured recipients.
Select Days	Select checkboxes.	Select the days of the week you want the report scheduled. You can select multiple or all days too.
Recipients	Click **Add** icon and add Email ids.	The Email IDs of the recipients you want the reports to be delivered to. **Note:** You can select the checkboxes against individual email ids to delete names from the recipient list.
Activate	Select checkbox.	Select this checkbox for the LCM application to commence delivery of reports as configured.

Click **Save** in the **Actions** pane to save the configuration.

To clear all data without saving, click **Clear** in the **Actions** pane.

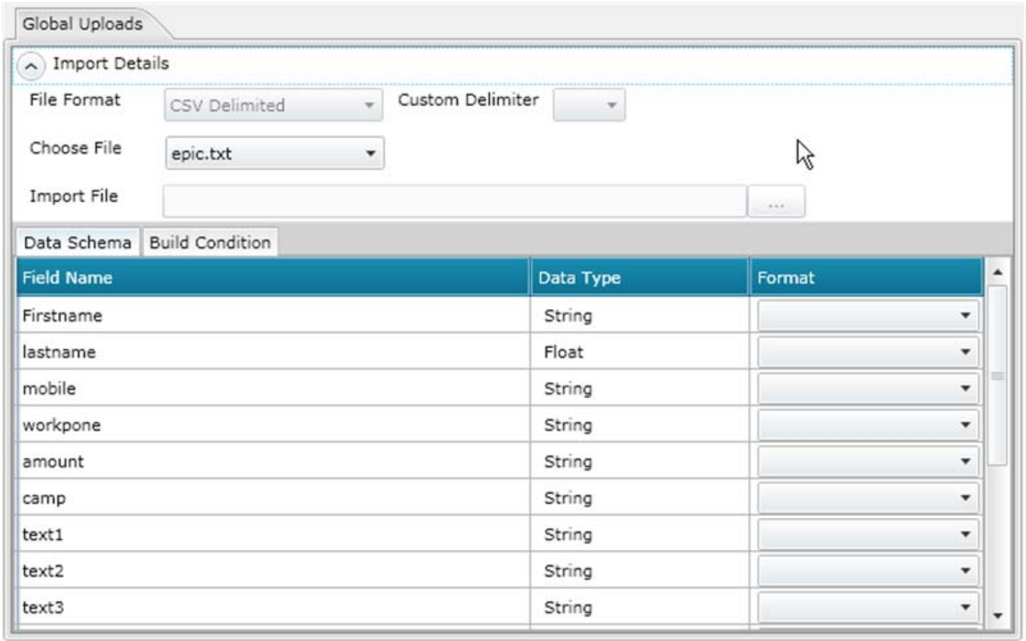
To modify a report in **Schedule Report**, click the appropriate item and make changes to the configuration. Click **Save** in the Actions pane. Your changes are; updated.

To delete a report from **Schedule Report**, click the **Delete** icon in the **Actions** pane. A dialog box confirming the deletion disappears automatically.

2.11 Global Upload

You can upload contacts in bulk using Global Upload. These contacts can be for multiple campaigns in a single upload file. You have to follow a series of processes and stipulate conditions to upload the contacts to appropriate campaigns. Click the **Global Upload** icon in the module component to open the **Global Upload** tab as shown in Figure 2–21.

Figure 2–21 Global Uploads - Import Details



Complete the fields as shown Table 2–14.

Table 2–14 Global Upload

Field	Action	Description
File Format	Select from drop-down list.	The format of the file containing the contacts that you want to upload. There are two possible formats. • CSV Delimited· File containing records with fields separated by a comma. • Custom Delimiter· File containing records with fields separated by a delimited other than a comma or a tab [for example, a vertical bar (pipe), a hyphen (dash), etc.].
Custom Delimiter	Enter a custom delimiter, if required.	The delimiter that is not a comma or a tab, used in a global upload file.
Choose File	Select from drop-down list.	The file that contains the global upload contact list. **Note:** A file is displayed in the drop-down list only after you have already imported a file as described in the Import File entry.

Field	Action	Description
Import File	Enter the path where the file is located or browse for the file.	The path where you have placed you global upload file. Click **Apply** in the **Actions** pane to complete action. **Note:** The import is incomplete and you will not be able to access the file if you do not click **Apply** in the **Actions** pane.

The header rows of the imported file are displayed in the **Data Schema** tab. Complete the fields in the **Data Schema** tab as shown in Table 2–15.

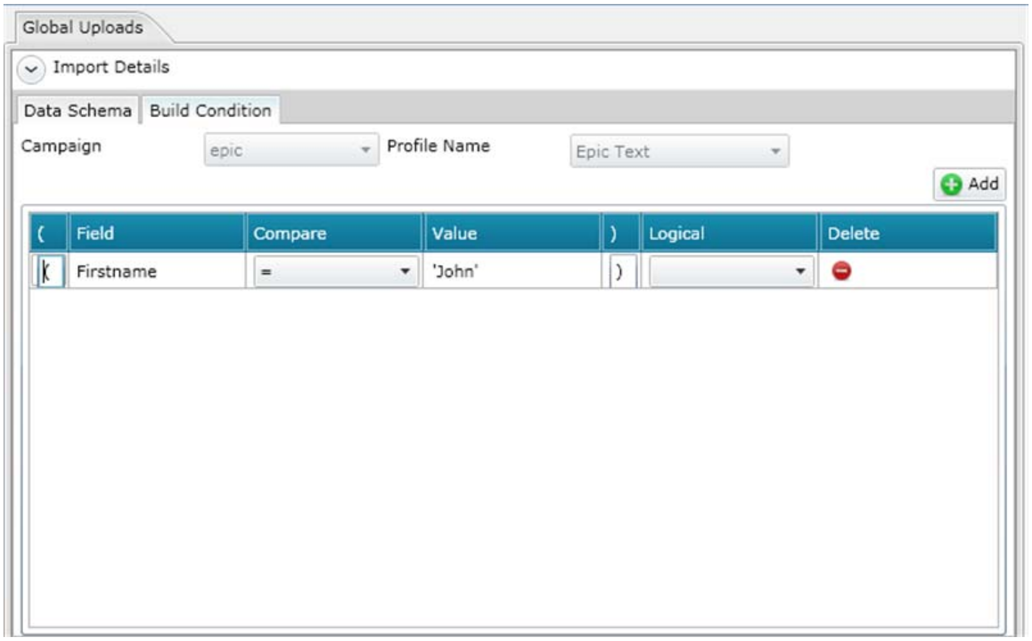
Table 2–15 Global Upload - Data Schema

Field	Action	Description
Field Name	Select from drop-down list.	The fields that form part of your file containing contacts for global upload.
Data Type	Select from drop-down list.	The data type of the field. For example, data type could be string, numeric, datetime, etc.
Format	Select from drop-down list.	The format in which the data is presented in the contacts for global upload. **Note:** Select a format only if the Data Type is datetime.

Click **Apply** in the **Actions** pane.

You have to set conditions based on which contacts have to be uploaded to campaigns. Click the **Build Condition** tab to open the **Build Condition** section as shown in Figure 2–22.

Figure 2–22 Global Uploads - Build Condition



Click **Add Condition** in the **Actions** pane to configure **Build Condition**. Select a campaign from the **Campaign** drop-down list. Select a profile from the **Profile Name** drop-down list. Click the **Add** icon located on the top right of the condition builder. Complete the fields as shown in Table 2–16 to build conditions for uploading contacts to campaigns.

Table 2–16 Global Upload - Build Condition

Field	Action	Description
(	Select.	An open parenthesis sign to begin the condition.
Field	Select from drop-down list.	A field that you want to form part of the condition to filter contacts for upload to a campaign. For example, First Name, Card Number, Last Name, etc.
Compare	Select from drop-down list.	The compare condition for the field. For example, you could set the compare for the field as equal to (=), greater than (>), lesser than (<), etc.
Value	Enter a value.	The value for the condition to be satisfied.
)	Select.	A close parenthesis sign to complete the condition
Logical	Select from drop-down list.	The logic when multiple conditions are built. For example, you can select And or Or to select a contact satisfying both conditions or any one of the conditions.

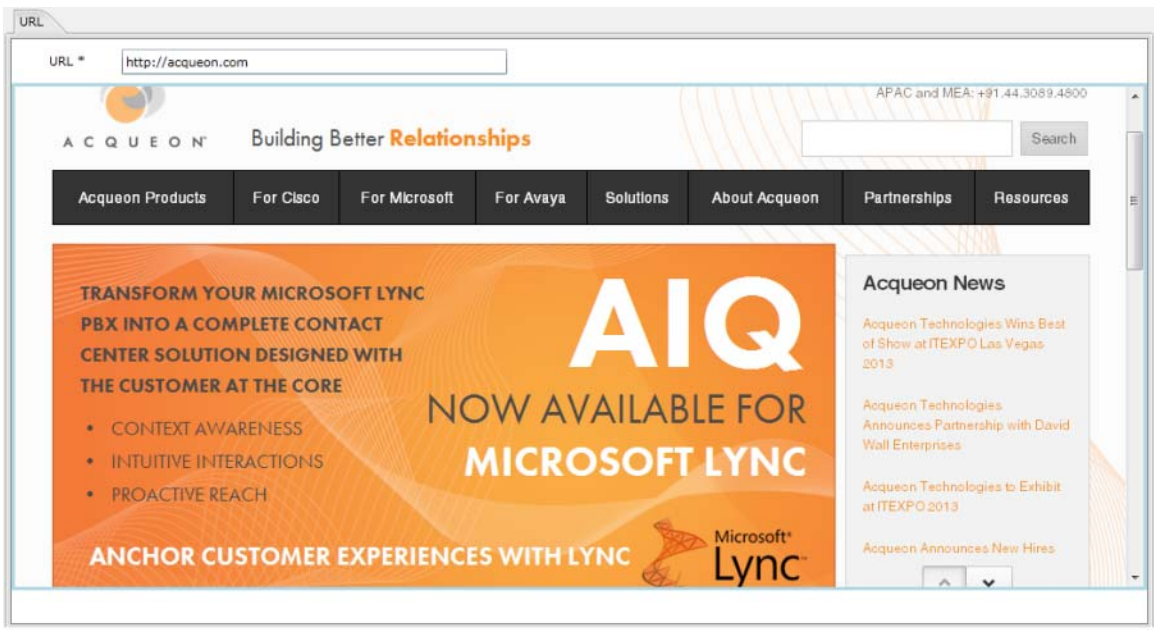
Field	Action	Description
Delete	Select.	You may require to delete one of many conditions. Click this icon to delete the specific condition.

Click **Save** in the **Actions** pane to save the **Global Upload**.

2.12 URL

You can embed a custom application into the LCM Console and provide the URL here. LCM Console invokes the URL and carry out operations as programmed in the web page. In other words, you can use this page as an embedded browser. See Figure 2–23.

Figure 2–23 URL



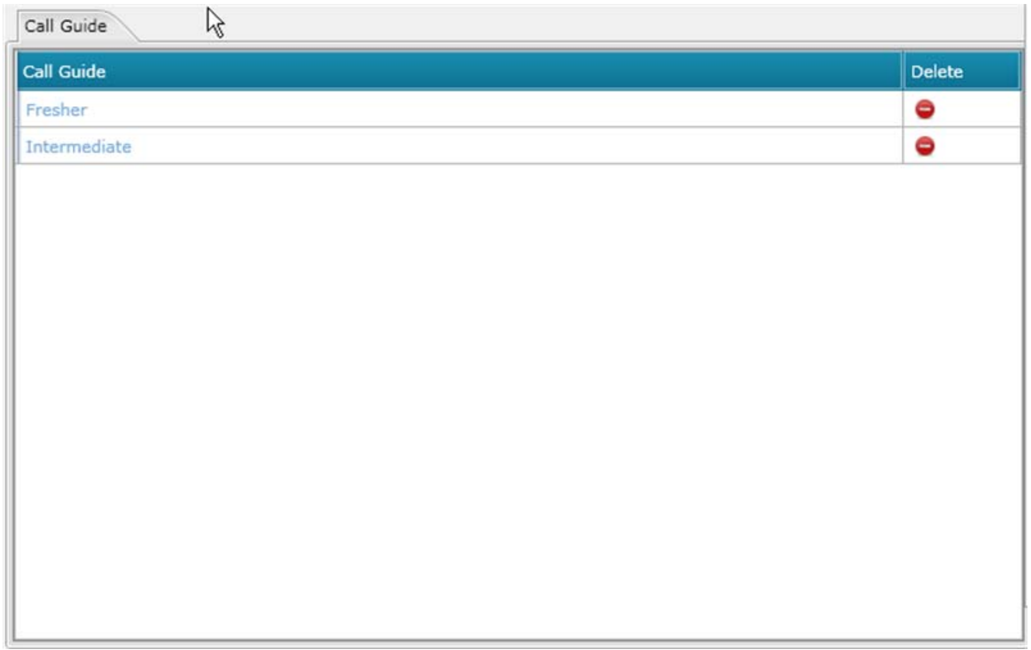
Click **Save** in the **Actions** pane to save the configuration.

Click **Clear** in the **Actions** pane to clear any data without saving. Click **Go** in the **Actions** pane to open the web page.

2.13 Call Guide

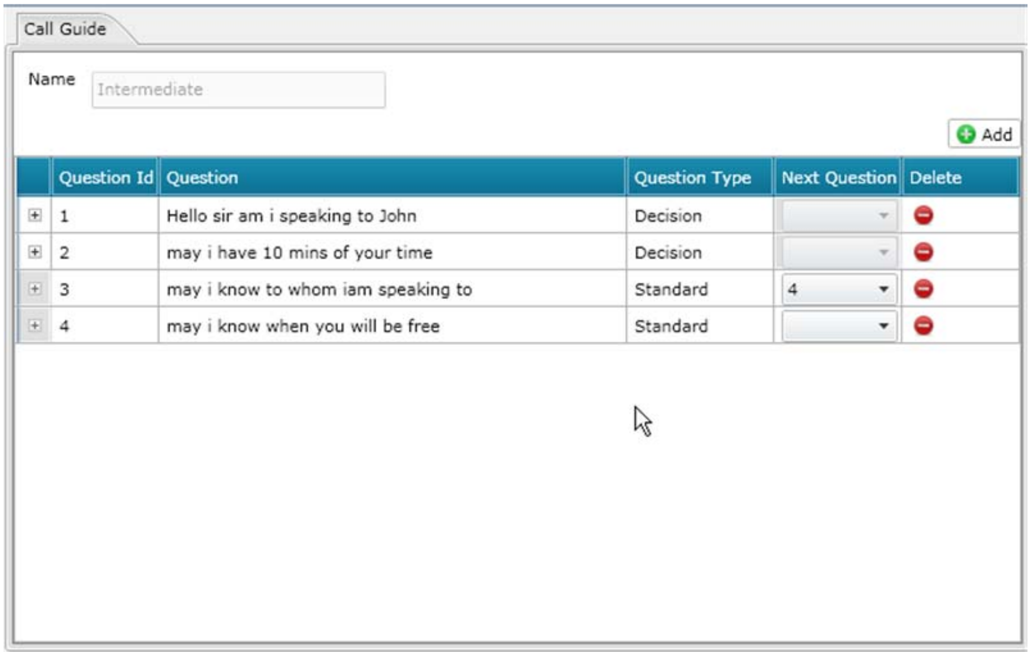
Call Guide is a facility using which an agent can see predefined questions to be posed to a contact when a call is connected. Based on the answers, the agent can either proceed to the next question or ask a supplementary question taking off from the previous question. You can configure a set of questions, answers, and supplementaries for the agents to use. Click the **Call Guide** icon in the module component to open the **Call Guide** tab to open the **Call Guide** tab. The list of configured call guides configured is populated as shown in Figure 2–24.

Figure 2–24 Call Guide



Click **Create** in the **Actions** pane to create a Call Guide. The screen to create a new Call Guide appears as shown in Figure 2–25.

Figure 2–25 Call Guide Creation



1. Click the **Add** icon to add questions to the call guide.
2. Complete the **Call Guide Name** field by entering a name for the call guide.
3. Enter an **ID** for the question.
4. Enter a **Question** for the agent to ask of the contact when the call is connected.
5. Select a question **Type**.
6. If your question type is **Standard**, select the ID for the **Next Question** from the drop-down list.
7. Select your question Type as **Decision**, if your next question depends on the answer to this question. For example, you might ask if the caller has a credit card. There could be two answers and your next question would depend on this answer. If the answer is YES, you would ask the credit card number; if the answer is NO, you would say Thank You and hang up.
8. A **Decision** box opens as shown in Figure 2–25.
    a. Click the **Add** button on the top right of the **Decision** box.
    b. Enter an **ID**.
    c. Enter an **Answer**.
    d. Select the **Next Question** from the drop-down list.

After you have entered all the questions and the expected answers, click **Save** in the **Actions** pane to save the **Call Guide**.

To delete any question, click the **Delete** icon alongside each question.

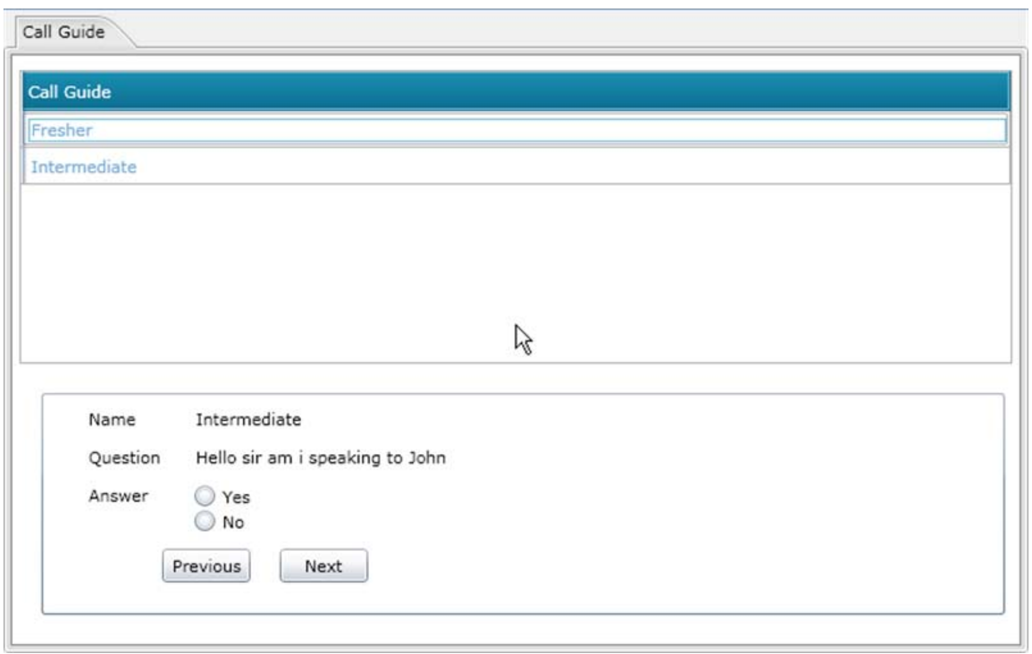
2.13.1 Call Guide Test

After you have created a call guide, you can test how the call guide works.

To test your call guide, click **Call Guide Test** in the Actions pane. Select a call guide to test from the populated list of call guides available in the application.

You can see the first question of the call guide in bottom half of the Work Area as shown in Figure 2–26.

Figure 2–26 Call Guide Test



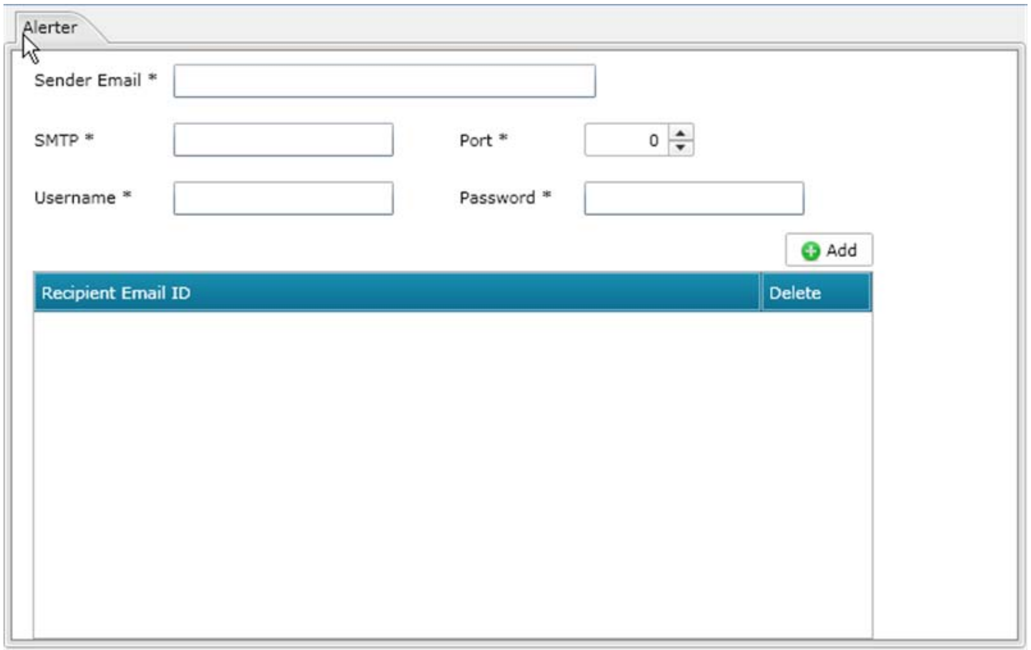
Provide an answer to the question in the Answer field. Click **Next** to proceed to the next configured question. You can check if the complete call guide question flow is as you configured.

At any stage, to move to the previous question, click the **Previous** button.

2.14 Alerter

You can set up an alerter to automate an email to an administrator when any configured service of the LCM application stops working. Click the **Alerter** module component to open the Alerter tab as shown in Figure 2–27.

Figure 2–27 Alerter



Complete the fields listed in Table 2–17 to set up the alerter.

Table 2–17 Alerter Configuration Details

Field	Action	Description
Sender Email	Enter data.	The sender Email ID.
SMTP	Enter data.	The IP address for the SMTP client host.
Port	Select from drop-down list or enter a port number	The port for the SMTP client host.
Username	Enter data.	The Username for the SMTP server that you use to send out Emails.
Password	Enter data.	The password for the SMTP server that you use to send out Emails.

Click the **Add** icon and add **Email ID**s of recipients who should receive a mail if the application stops working.

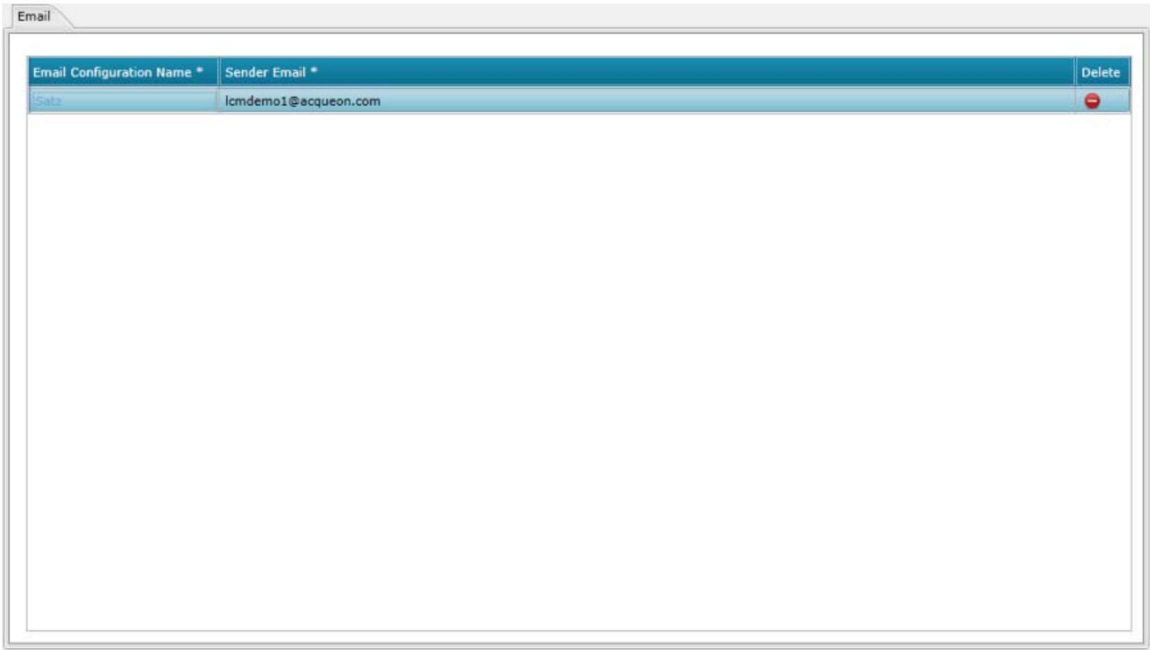
To delete recipient Email ID(s), click the **Delete** icon alongside each Recipient Email ID.

Click **Save** in the **Actions** pane to save the configuration.

2.15 Email

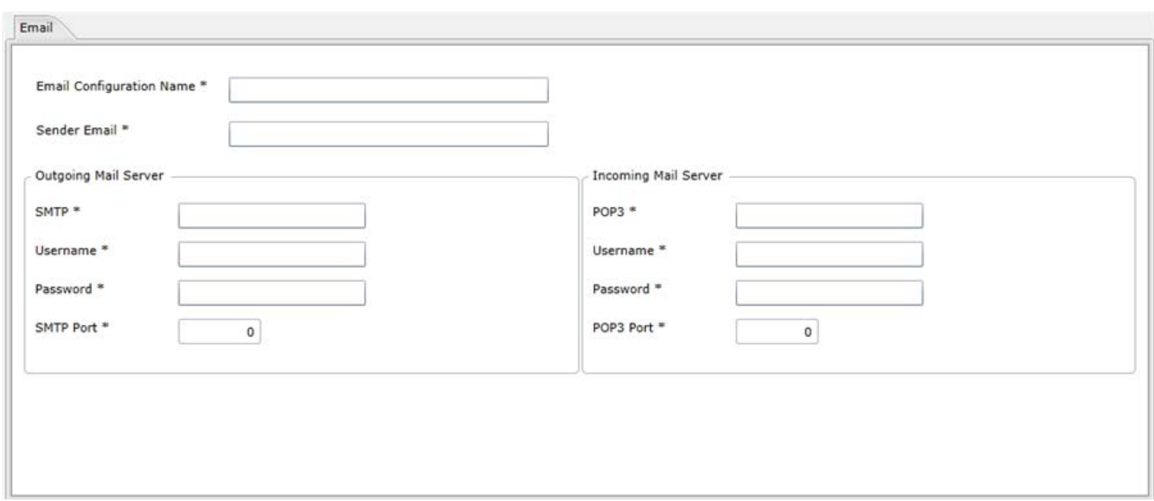
You can use the Email option to configure your Email servers to send out campaign-related automated static/dynamic Emails. Click the **Email** module component to open the **Dialer Details** tab as shown in Figure 2–28.

Figure 2–28 Email Server Details



Click **Create** in the **Actions** pane to add an Email server. The Email tab to create a new server is shown in Figure 2–29.

Figure 2–29 Email Details



Complete the details shown in Table 2–18 to configure your Email servers.

Table 2–18 Email Server Configuration

Field	Action	Description
Email Configuration Name	Enter Details	The name for this Email configuration.
Sender Email	Enter details.	The Email id of the sender.
Outgoing Mail Server		
SMTP	Enter details.	The SMTP server IP address
Username	Enter details.	The username to access the SMTP server.
Password	Enter details.	The password to access the SMTP server.
SMTP Port	Enter details.	The SMTP server port number.
Incoming Mail Server		
POP3	Enter details.	The POP3 server IP address
Username	Enter details.	The username to access the POP3 server.
Password	Enter details.	The password to access the POP3 server.
POP3 Port	Enter details.	The POP3 server port number.

Click **Save** in the **Actions** pane to save the Email server information.

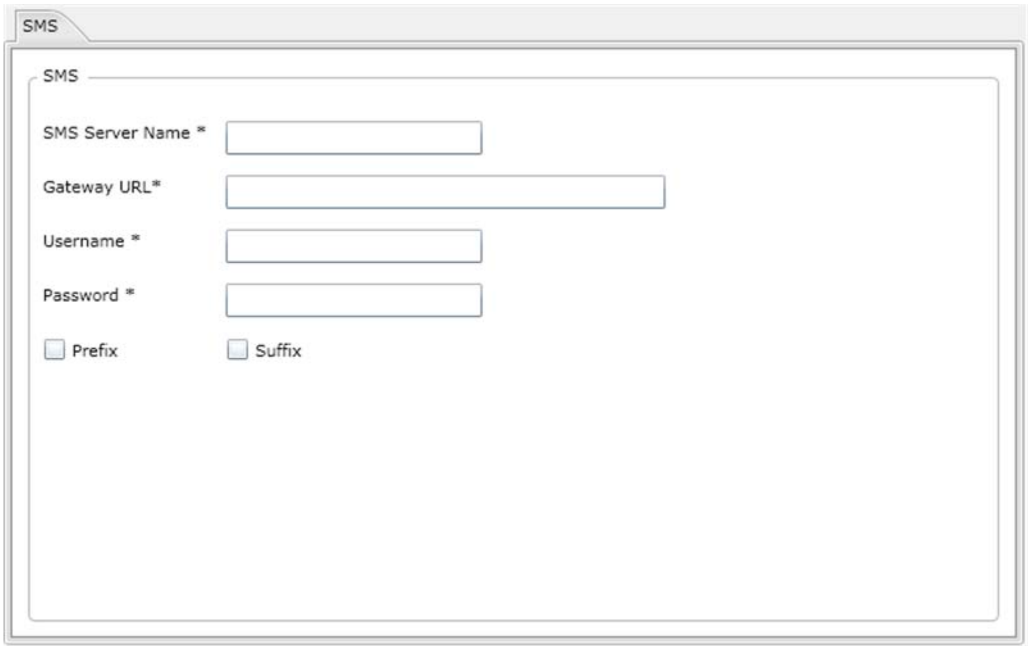
2.16 SMS

You can use the SMS option to configure your SMS gateway servers to send out campaign text messages. Click the **SMS** module component to open the **SMS** tab as shown in Figure 2–30, listing the configured SMS gateway servers.

Figure 2–30 SMS Servers

Click **Create** in the **Actions** pane to add an SMS gateway server. The **SMS** tab to create a new server is shown in Figure 2–31.

Figure 2–31 SMS Details



Complete the details shown in Table 2–19 to configure your SMS gateway server.

Table 2–19 SMS Gateway Server Configuration

Field	Action	Description
SMS Server Name	Enter details	The SMS server name.
Gateway URL	Enter details.	The SMS gateway server URL.
Username	Enter details.	The username to access the SMS gateway server.
Password	Enter details.	The password to access the SMS gateway server.
Prefix	Select checkbox.	Select if you want a prefix to be attached to the SMS. **Note:** The prefix digit is configured in the LCMService configuration file.
Suffix	Select checkbox.	Select if you want a suffix to be attached to the SMS. **Note:** The suffix digit is configured in the LCMService configuration file.

Click **Save** in the **Actions** pane to save the SMS gateway server information.

2.16.1 SMS Gateway URL

Note the following points when configuring SMS using details in Table 2–19.

Gateway URL

The Gateway URL for your SMS Gateway should contain the details as in the sample gateway URL below:

http://api.clickatell.com/http/sendmsg?user={1}support&password={2}&api_id=3375264&to={3}&text={4}

(Or)

https://api.clickatell.com/http/sendmsg?user={1}support&password={2}&api_id=3375264&to={3}&text={4}

Note: This configuration is presently qualified only for Clickatell.

From the above URL,

- Use an applicable valid web address in place of api.clickatell.com
- {1} is the username for the SMS Gateway
- {2} is the password to access the SMS Gateway
- {3} is the SMS recipient number as uploaded
- {4} is the message that goes out as an SMS

Note: {3} and {4} are automatically taken from the respective uploads.

Any failure message returned by the SMS engine must begin with ERR. All other messages are considered as success.

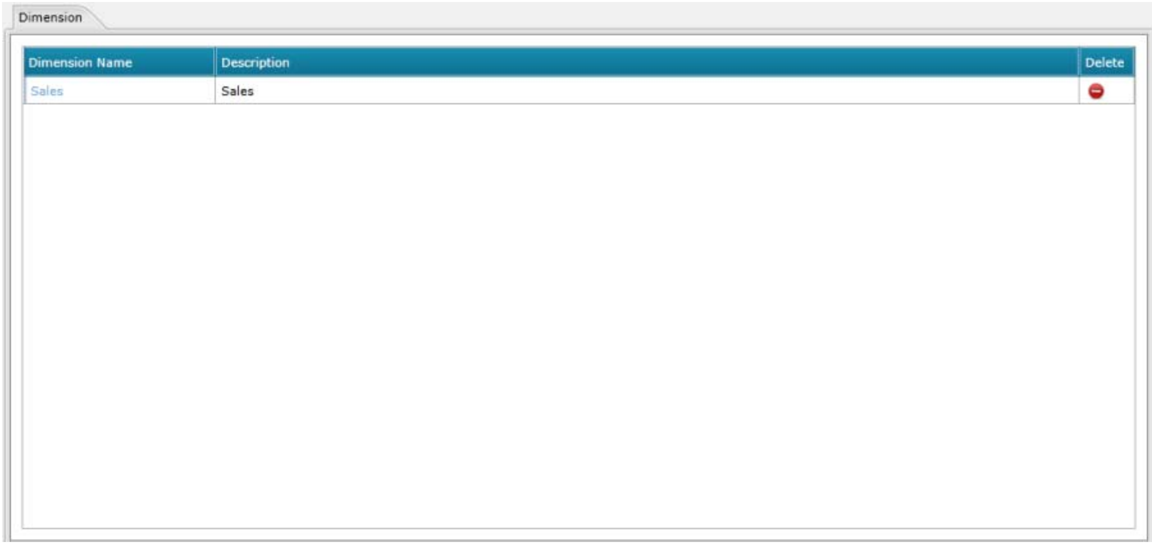
2.17 Dimension

Dimension is envisaged as a complement to the already powerful LCM reporting suite. Using dimensions, you can build customized reports at the enterprise level.

Campaigns have business parameters, some mandatory and some optional, configured according to certain campaign-specific requirements. For 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, Dimensions are the way to go. You can map similar business parameters across campaigns, no matter where they are configured, under one dimension.

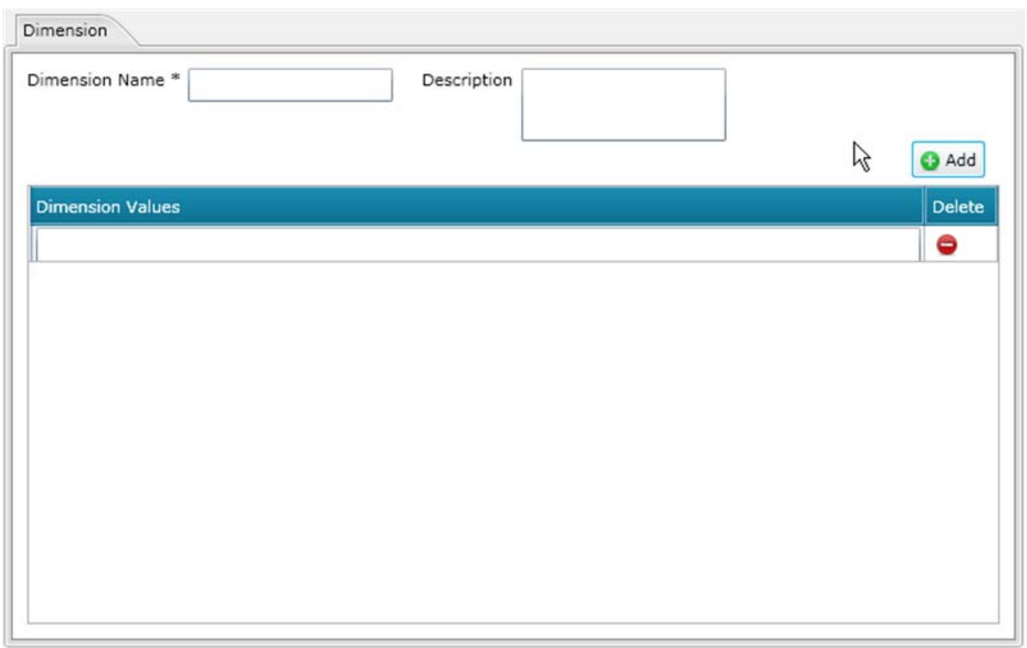
Click the **Dimension** module component to open the **Dimension** tab as shown in Figure 2–32.

Figure 2–32 Dimensions Home



To create a new dimension, click **Create** in the **Actions** pane on the left. The **Dimension** tab is displayed as shown in Figure 2–33.

Figure 2–33 Dimensions - Create



Complete the fields listed in Table 2–20 to configure a dimension.

Table 2–20 Dimensions - Configuration

Field	Action	Description
Dimension Name	Enter data.	The name for this dimension.
Description	Enter data.	The description for this dimension.

Click the **Add** icon and add **Dimension Values**. Click **Save** in the **Actions** pane to save the changes.

To edit a dimension, click a **Dimension Name** and change the desired fields. Click **Save** in the **Actions** pane to save the changes.

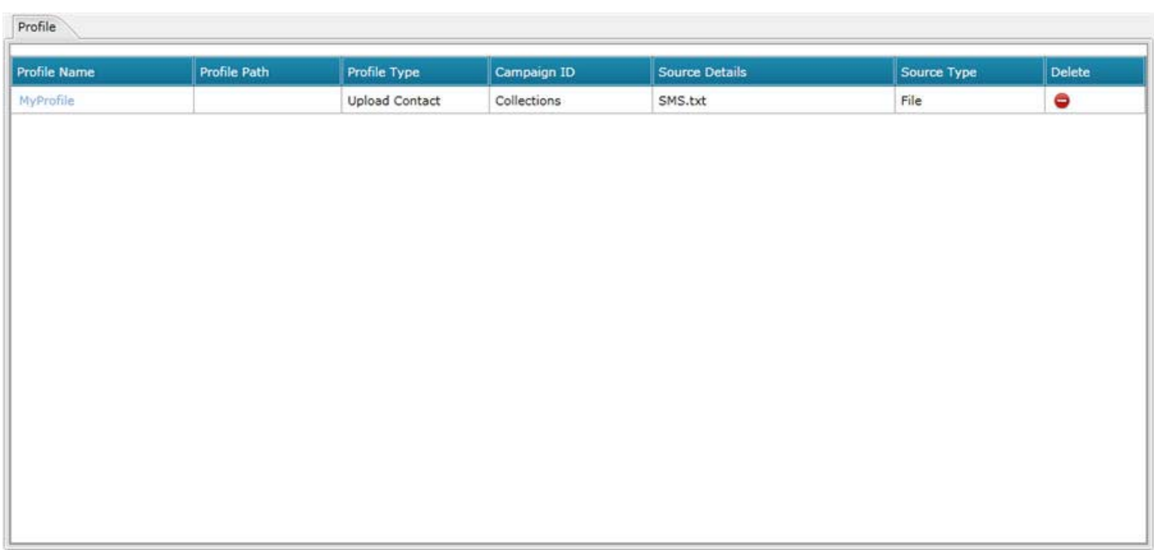
Click the **Delete** icon against any entry to delete unwanted dimension values from the **Dimension** tab.

2.18 Profile

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

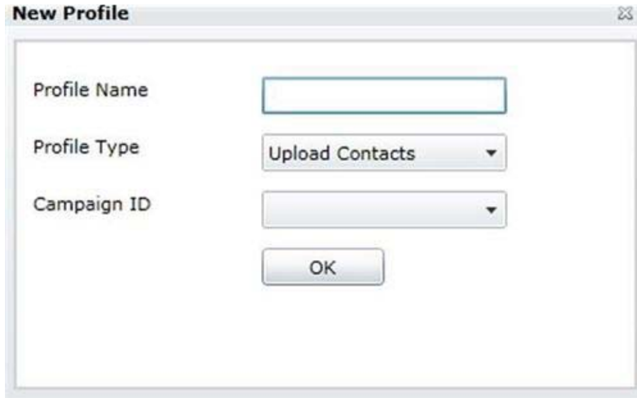
Click the **Profile** module component to open the **Profile** tab. The list of Profiles configured is populated as shown in Figure 2–34.

Figure 2–34 Profile



Click **Create** in the **Actions** pane to create a Profile as shown in Figure 2–35.

Figure 2–35 Creating a Profile



Complete the details shown in Table 2–21 to configure your Profile.

Table 2–21 Profile Configuration

Field	Action	Description
Profile Name	Enter details	The profile name for which you want to save the configuration.
Profile Type	Select from drop-down list	The profile type for which you want to create a profile. You can select from the following: • Upload Contacts • Scrub Contacts • Compliance
Campaign ID	Select from drop-down list	The campaign ID for which you want to set contacts. **Note:** Campaign ID is not required if Profile Type is Compliance.

Click **OK** to create the profile. The application redirects you to the screen based on the selected **Profile Type**:

- **Upload Contact**: For detailed information, see Upload Contacts
- **Scrub Contact**: For detailed information, see Scrub Contacts
- **Compliance**: For detailed information, see Compliance

Click **Save Profile** in the **Actions** pane to save the configuration. Click **Clear** in the **Actions** pane to clear any data without saving.

To modify an existing profile, select a **Profile** from the listing, make the required changes, and click **Save Profile** in the **Actions** pane.

You can also use an existing profile to create a new one with minimal changes. Make the required changes to an existing profile and click **Save Profile As** in the **Actions** pane. Complete the **Profile Name** field and click **OK** to save.

To delete a profile, click the **Delete** icon alongside the Profile you want to delete. A dialog box confirming the delete disappears automatically.

Chapter 3

Call Strategy

Call Strategy is about configuring a set of rules for various modes. This set of rules decides the mode on which a contact is reached, based on the weight assigned to the mode. If the dialer cannot successfully reach a contact for whatever reason, you can have a call strategy in place which tells the application what to do next. You could, at the first unsuccessful try, reduce the priority for this mode, and then 'instruct' LCM Console through your call strategy to either try the contact on the mode with the next higher priority, reschedule the contact to a later time on the same mode, branch the contact to a different mode, or even close the contact. In short, your call strategy configuration largely contributes to the success or otherwise of a campaign.

Before we set about describing how to configure a call strategy on LCM Console, let us have a look at how call strategies work.

3.1 How Call Strategy Works

Bob, Rick, and Mark are managers in a contact center that handles multiple companies across a wide spectrum. They have to independently handle assignments for different companies. The requirement from the customer is rather complicated for Bob; Rick has no such complications and his customer requires just a cycle-based campaign; Mark faces an issue with customers requesting callbacks. All three have recourse to the same application, LCM. Offering three types of call strategies, LCM is well equipped to cater to both Bob and Rick. Let us walk through the strategies Bob, Rick, and Mark use to meet requirements from their customers.

3.1.1 Advanced Call Strategy

Bob has, on his hands, a rather tricky assignment from a long-standing client - a single-day campaign with a large list of contacts. The client has mandated a minimum percentage of contacts to be reached out before the one-day campaign closes.

Bob works through the list two days before the campaign and configures an ideal call strategy on List and Campaign Manager (LCM). He observes from the contact list that the contacts to be dialed are all in the age group 25-30, employed as executives, and have a mobile phone.

Bob now needs to work out an optimal call strategy using LCM to achieve what his client has mandated. This is where, Bob realizes, that he can unleash the versatile call strategy to derive maximum mileage to his client in terms of contacts delivered. He sets upon analyzing the contacts and hits upon the optimal call strategy - and, this optimal call strategy is very much configurable on LCM.

His Call Strategy is shown in Table 3–1.

Table 3–1 Call Strategy

Mode	Weight	Start Time	End Time	Max Retry
Office	10	9.00	10.00	2
Home	9	7.00	8.00	2
Mobile	8	11.00	13.00	2

Note: The Campaign Start Time is configured as 0845 hours and the Campaign End Time as 1300 hours.

Bob has given maximum weight to the office number of a contact, so that he catches the contact on the call when he is just about starting for the day.

Bob has configured telephony outcomes as shown in Table 3–2.

Table 3–2 Telephony Outcome - Illustration

Outcome	Days	Hours	Minutes	Seconds	Max Retry	Close Contact	Branch To Mode
No Answer	0	0	15	0	2	False	NA
Busy	0	0	15	0	2	False	NA

What this call strategy does to Bob's campaign is to push the contacts with the highest weight to the dialer and the dialer begins dialing the numbers. The telephony outcomes are then retrieved by LCM and for telephony outcomes like No Answer or Busy, the strategy is applied for a retry.

Let us assume Jack is a contact in the list and is picked up and sent to the dialer. The dialer contacts Jack at 09.30 hours and receives no answer. The telephony outcome is logged as No Answer. LCM fetches this outcome at 09.46 hours.

Bob is sure that LCM will check if the global retries have exceeded for Jack's contact. Though retries are still available for the Office mode, the time to call this mode has exceeded. This is because for the outcome No Answer, LCM is configured to retry after 15 minutes, and the retry time will be 10.01 hours, whereas the time to call the Office number is only up to 10.00 hours. LCM will look out if there is any other callable mode for the day – remember, the campaign runs for only one day. The mode with the next highest weight is Home; however, the Start Time for this mode is only 7.00 hours. LCM figures out that an earlier mode (Mobile) is available and ensures that the contact is reached at the earliest by sending the contact's mobile number next to the dialer, rather than the Home number. So, the dialer dials out the mobile number at 11.00 hours. This is because the

Home number is configured to start at 7.00 hours, which is the next day and the campaign ends the same evening.

In any other scenario, Bob would have had to be satisfied with a contact not reached, because the campaign would be closing the same evening. However, using the LCM and its power-packed algorithms, Bob was able to successfully establish contact to Jack's mobile number. And, having reached Jack, the numbers for Bob show one less failed contact in the final analysis.

3.1.2 Simple Call Strategy

Rick has a customer who sells subscriptions to magazines. The customer would want Rick to adopt a cycle-based strategy and call all modes in one cycle. If the cycle fails to yield the result, another cycle could be attempted. The first is a call to the contact at the home phone. If the home phone does not yield the desired result, the office phone should be the next on the hit list. Should the office phone too fail, the mobile number for the contact is the final try for this cycle.

If all the three modes fail, Rick has to reschedule the cycle and repeat the same method of reaching the contact. Rick can control the number of cycles allowed in a campaign.

Mode	Weight	Start Time	End Time	Mode Retry
Office	10	9.00	6.00	1
Home	9	9.00	6.00	1
Mobile	8	9.00	6.00	1

Rick configures the modes and the start times as above. Note that Rick does not have the flexibility of starting and ending different modes at different times. Opting for a simple strategy has its own limitations, but ease of operations. Rick has to choose the same start and end time for all modes, and the number of mode and outcome retries should be one.

Outcome	Days	Hours	Minutes	Seconds	Cycle Retry	Close Contact	Branch To Mode
No Answer	0	5	0	0	3	False	NA
Busy	0	6	0	0	3	False	NA

Rick also has no option but to configure 1 as the outcome retry for all outcomes. He cannot branch to another mode in case one mode fails. Now, let us see how this works.

The first try to reach a contact on the mode with the most weight - Office - is at 9.00 am. This fails and the home mode is tried next. This also fails, the application next delivers the mobile number to the dialer. This also fails, resulting in one complete cycle failing at 10.30 am. Rick has configured to run three retires on the cycle. The reschedule period is six hours. The application waits till 4.30 pm and starts the cycle all over again. If one of the modes returns a successful outcome, the contact is closed as configured. If this cycle too fails, this is marked for the next cycle retry. However, the end time for all modes is 6.00 pm, well beyond the end time for all the modes. So, the application delivers the contacts, for the next dialing cycle, on the next working day of the campaign. LCM closes the contact when the configured cycles are exhausted.

3.1.3 Callback Strategy

Mark has a rather complicated issue - all his contacts seem to request callbacks. He is in a quandary as to what strategy to adopt, until he finds out LCM has something made for him too. Once a customer requests a callback, Mark has to configure an appropriate callback strategy. Let us assume Mark has a call strategy as below:

Mode	Weight	Start Time	End Time	Mode Retry
Office	10	9.00	6.00	1
Home	9	9.00	6.00	1
Mobile	8	9.00	6.00	1

On the first try to the Office mode, a customer requests a callback for the next morning at 10. The agent sets a callback for this customer. Once an agent sets a callback request, the Callback Strategy comes into play. Mark has configured the callback strategy thus:

Mode	Weight	Start Time	End Time	Mode Retry
Private	10	10.00	6.00	10
Mobile	8	11.00	6.00	1

Notice the deliberate setting of Mode Retry at 10 - this is because the customer has once answered the call and requested a callback on a preferred mode. Since this is a customer-desired mode, there should not be any problems in placing calls repeatedly (depending on configured outcomes) and the customer time preferences.The next attempt is made at 10.00 am to the Private mode. If the call is marked success by an agent, this is dealt with as per the configuration for the outcome that an agent has selected. If the Private mode is unreachable for some reason, and the outcome is set for another callback, the Private mode keeps getting callbacks till LCM reaches the number of retries.

An agent can set two types of callback:

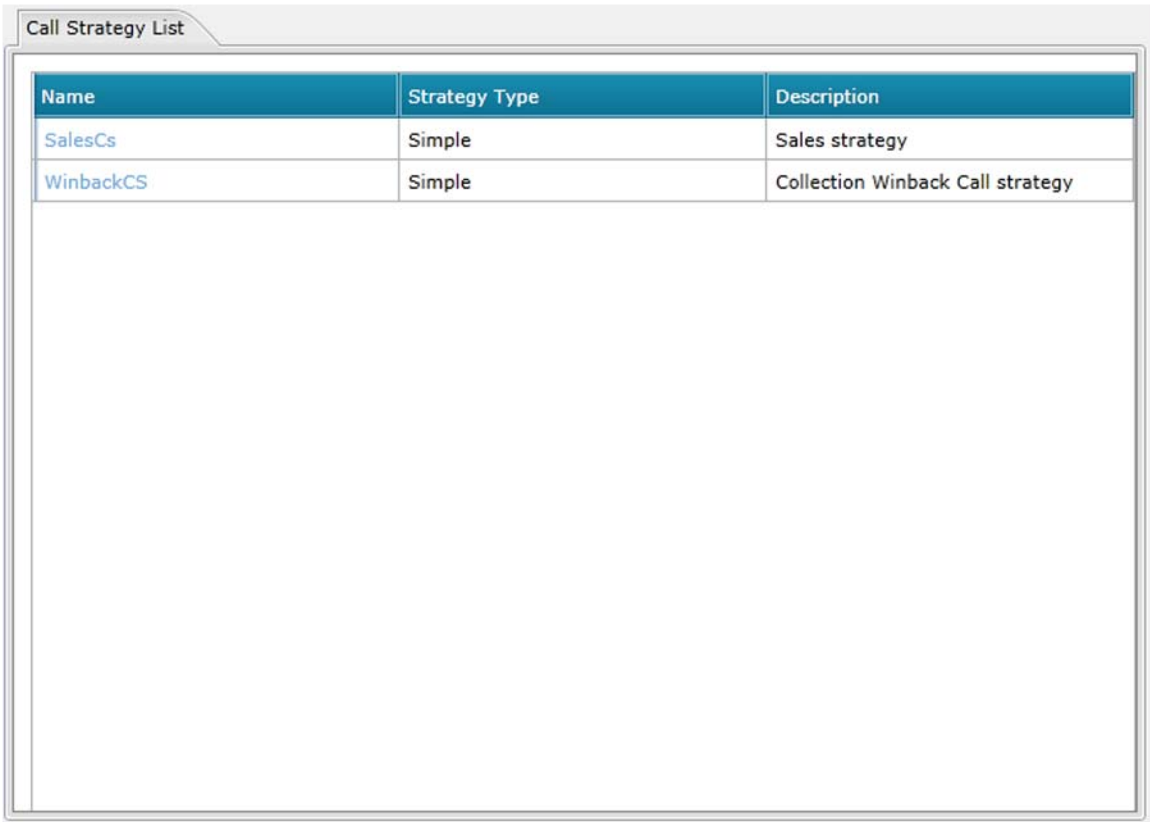
- Personal Callback, where the dialed callback is routed to the same agent who set the callback
- Normal Callback, where the dialed callback is routed to any available agent with the required skill.

3.2 Configuring a Call Strategy

To start configuring the call strategy parameters, click the **Call Strategy** module in the module strip on the right of your screen.

The **Call Strategy List** tab is displayed as shown in Figure 3–1.

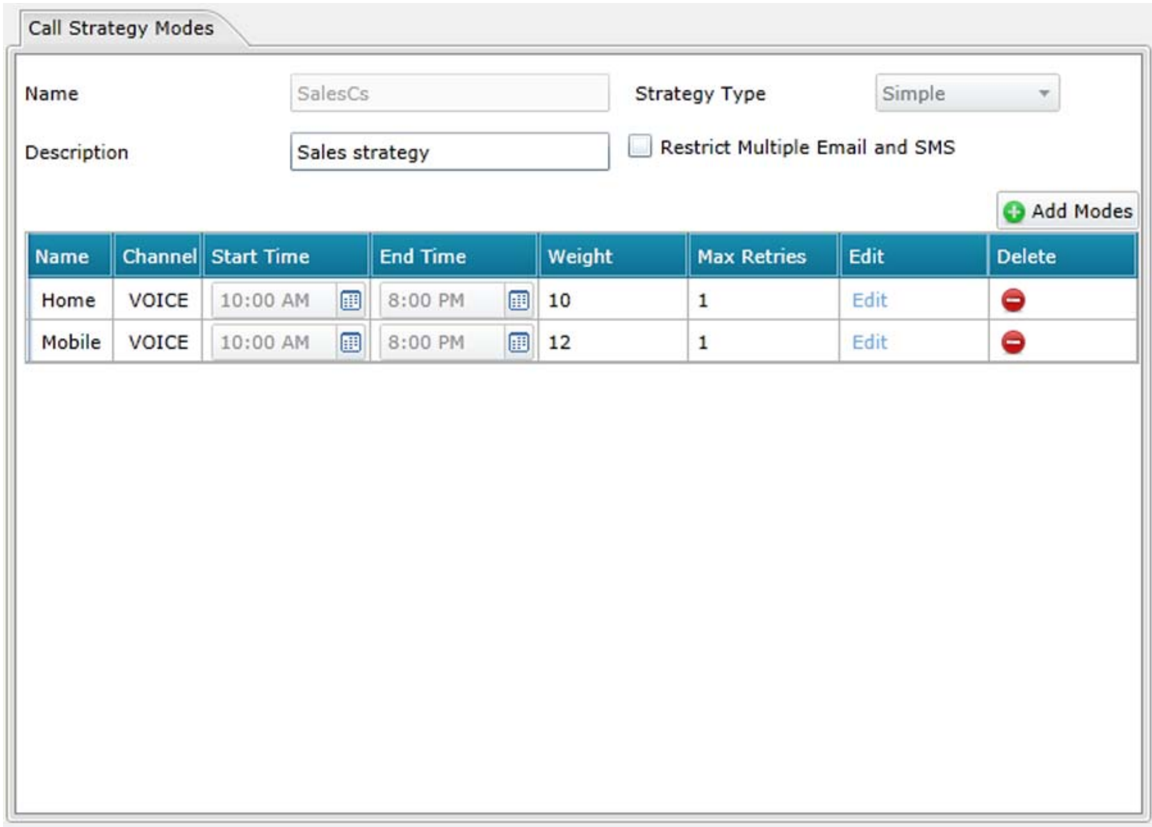
Figure 3–1 Call Strategy List



3.2.1 Call Strategy Modes

Click **Create** in the **Actions** pane to create a new call strategy. The **Call Strategy Modes** screen is displayed as shown in Figure 3–2.

Figure 3–2 Call Strategy Modes



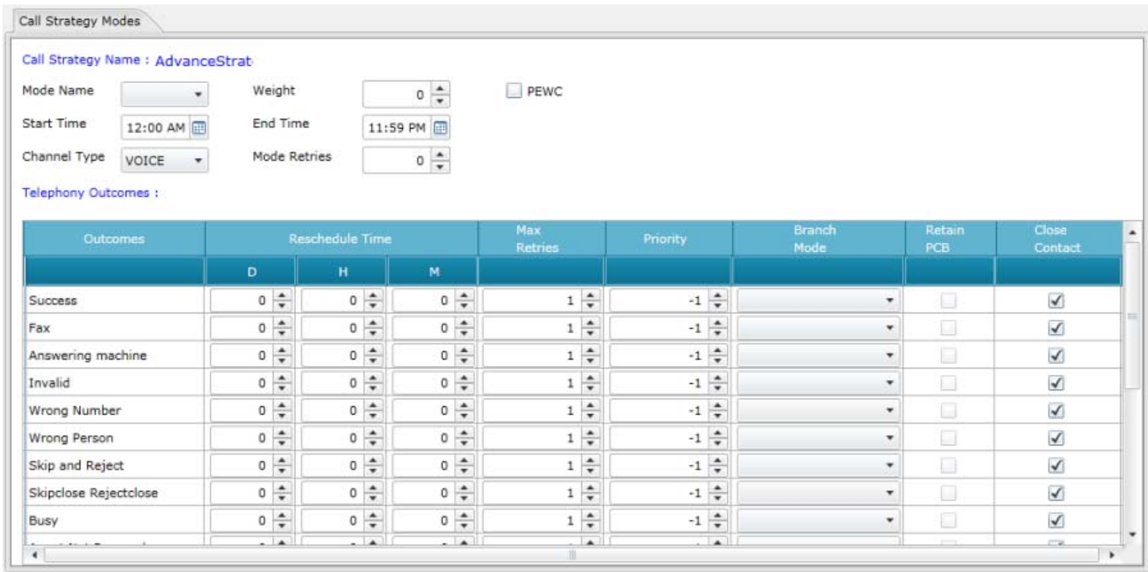
Complete the fields as shown in Table 3–3.

Table 3–3 Call Strategy Modes - Details

Field	Action	Description
Name	Enter a name.	A unique name for the Call Strategy you want to create.
Description	Enter a description.	A description for the Call Strategy you want to create.
Strategy Type	Select from drop-down list.	The strategy type for the Call Strategy you are creating. You can choose from • **Simple** • **Advanced** • **Callback**
Restrict Multiple Email and SMS	Select checkbox.	This checkbox controls sending of multiple Emails and text messages to the same contact.

Click the **Add Modes** icon on the right top corner of the **Call Strategy Modes** screen to configure the call strategy as shown in Figure 3–3.

Figure 3–3 Call Strategy - Add Modes



Complete the fields as shown in Table 3–4.

Table 3–4 Call Strategy - Add Modes

Field	Action	Description
Mode Name	Select from drop-down list.	The mode for which you want to configure a call strategy.
Weight	Enter a number.	The weight you want to assign to this mode. Contacts are delivered to the dialer in descending order of weight.
PEWC	Select checkbox.	Whether you want PEWC enabled for this mode. Selecting this checkbox enables PEWC for this mode.
Start Time	Select from popup panel.	The start time applicable to this mode. The dialer does not dial out a call before this time. **Note:** If your strategy is a simple strategy, select the SAME start times for all your modes.
End Time	Select from popup panel.	The end time applicable to this mode. The dialer does not dial out a call after this time. **Note:** If your strategy is a simple strategy, select the SAME end times for all your modes.

Field	Action	Description
Channel Type	Select from drop-down list.	The channel you want this mode to use. Available options are VOICE, SMS, and EMAIL.
Mode Retries	Enter a number.	The number of times you want to retry reaching out to the contact on this mode. **Note:** If you are selecting a simple strategy, only 1 mode retry is allowed.
Outcomes	Non-editable.	The telephony outcomes are listed and you can configure the call strategy for each outcome by filling out the fields against each.
Reschedule After Days	Enter a number.	The number of days by which you want to reschedule the call.
Reschedule After Hours	Enter a number.	The number of hours by which you want to reschedule the call.
Reschedule After Minutes	Enter a number.	The number of minutes by which you want to reschedule the call.
Max Retries	Enter a number.	The number of retries you want to allow using this call strategy for this mode.
Priority	Enter a number.	The adjustment you want to make to the priority to this mode based on this outcome. For a set of contacts selected and ready for delivery, those with higher priority are delivered first to the dialer.
Branch Mode	Select from drop-down list.	For this outcome, the alternate mode to which you want to call the contact on. **Note:** Not applicable if you are selecting a simple strategy.
Retain PCB	Select checkbox.	For this outcome, selecting this checkbox results in the contact being marked as a personal callback. **Note:** Not applicable if you are selecting simple or advanced strategy.
Close Contact	Select checkbox.	Whether you want to close the contact for this outcome. Selecting the checkbox closes the contact.

Click **Apply** in the **Actions** page to update your changes.

To add another mode to this call strategy, click the **Add Modes** icon again and complete the fields in Table 3–4.

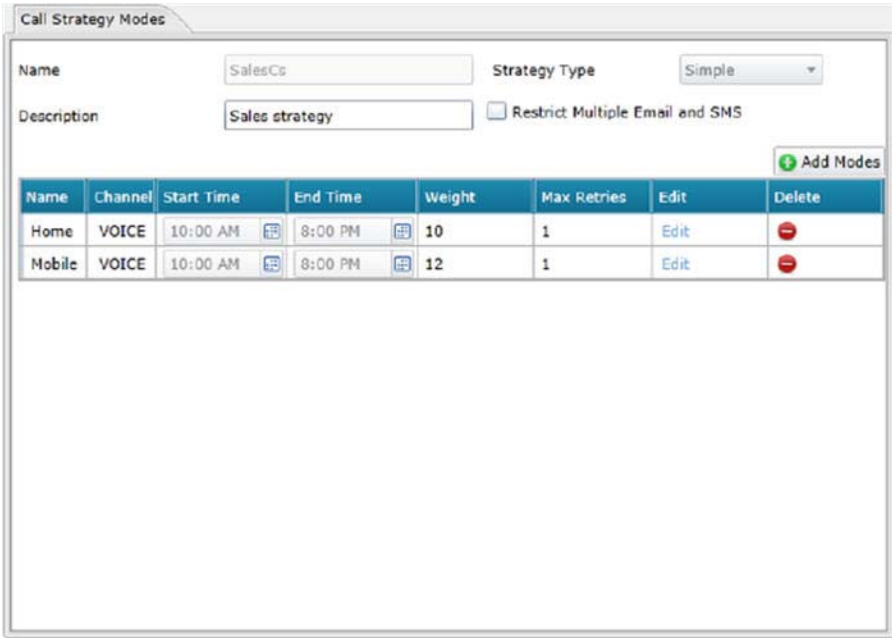
The call strategy for all the modes you configured is displayed.

Click **Save** in the **Actions** pane to save the call strategy configuration.

To edit the call strategy for a specific mode, click the **Edit** icon under the **Edit** column in the work area. Click **Save** in the **Actions** pane to update your changes.

To delete the call strategy, note that there are two delete icons as shown in Figure 3–4.

Figure 3–4 Call Strategy - Delete



To delete the call strategy for a specific mode, click the **Delete** icon in the work area under the **Delete** column.

To delete the call strategy for all modes, click the **Delete** icon in the **Actions** pane.

Note: Deleting from the **Actions** pane deletes the configured call strategies for all modes. Use this option very carefully.

Chapter 4

Campaign Groups and Campaigns

4 .1 Campaign Groups

Every campaign on the Unified CCE dialer is represented as a campaign group on LCM Console. This is different from the campaigns in LCM Console. You can create any number of campaigns on LCM Console, and attach these campaigns to any campaign group, that is, any Unified CCE campaign.

Simply put, LCM campaigns can be called sub-campaigns (or extensions) of the Unified CCE campaigns (or, campaign groups on LCM). The campaign groups concept has some advantages as listed in Advantages of Campaign Groups.

4.1.1 Synchronizing with the Unified CCE Dialer

The contacts for your campaigns will be delivered to the Unified CCE dialer only if you synchronize campaigns on the Unified CCE dialer with those on your LCM Console.

Before synchronizing, ensure that the campaign is created in the Unified CCE dialer using configuration manager. (For more information on creating campaigns in Unified CCE Dialer, refer the section **Outbound Option Configuration Components Description** in **Outbound Option User Guide for Unified CCE Dialer ICM/ IPCC Enterprise & IPCC Hosted Editions**).

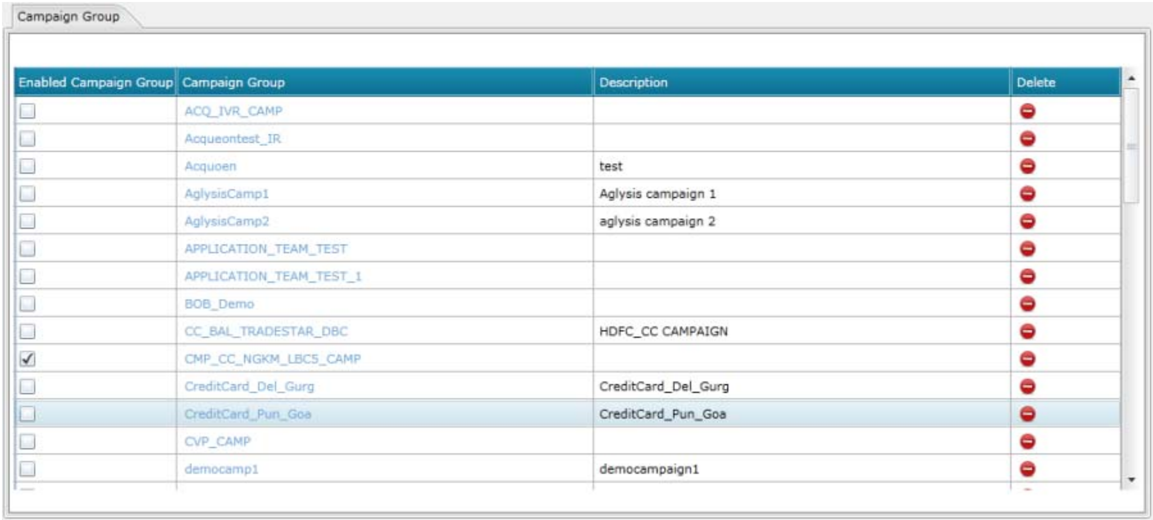
Note: You must create at least one campaign under each campaign group that you synchronize from the Unified CCE Dialer database, failing which LCM will NOT be delivered the contacts to the Unified CCE Dialer.

Note: You cannot delete a Unified CCE dialer campaign group in LCM Console. Should you require, first delete a campaign in the Unified CCE dialer, and re-synchronize in LCM Console. Also, when you make changes in the Unified CCE Dialer that are relevant to the campaign, those changes are reflected in LCM Console only after you re-synchronize.

Note: Your campaign names on the Unified CCE dialer name must not contain special characters like (.).

To synchronize LCM Console with the Unified CCE dialer, click **Sync** in the **Actions** pane.

Figure 4–1 Synchronized Campaigns



The campaigns on the Unified CCE dialer now appear as Campaign Groups on LCM Console and are listed in the **Campaign Group** column. From these campaign groups, you can select LCM Campaign Groups by selecting the appropriate checkbox in the **Enabled Campaign Group** column.

Note: LCM processes only those campaign groups you select.

4.1.2 Configurations Required in the Unified CCE Dialer

4.1.2.1 Import Rule

Import Name	Specify an Import Name. **Note:** Only one rule for a campaign
Enable	Select the checkbox.
Import Type	Specify an Import Type. Contact type only allowed. Do not specify any DNC type.
Import File path	Specify the path where your import file is located. **Note:** Provide appropriate rights to the user under which LCM service is running. For detailed information on access rights, refer ***LCM Installation Guide***.
Import Data type	Data type should be comma delimited.
Overwrite table	Disable overwrite table option.
Definition	
Fields	Add Field name, Data type, Standard Column type, and Allow Nulls. **Note:** The **account number** field should be part of the field definition since this field is used as common key between LCM and Unified CCE dialer databases.
Schedule	
	Select **Start Import** when file is present. Rename file after import.

4.1.2.2 Query Rule

Query Rule Name	Specify a Query Rule Name.
Import Rule	Select an appropriate Query Rule.
Rule Clause	Should be minimum (for example, 1=1, since query rules are replaced by LCM filter).

4.1.2.3 Campaign

Campaign General Tab	
Campaign Name	Specify a Campaign Name.
Enable	Select the checkbox.
Dialing Algorithm	
Lines / Agent (1-100)	Can be customer specific.
Dialing Options	
Maximum Lines / Agent (1-100)	Can be customer specific.
Abandon Call Limits (0-20)	Can be customer specific.

Dialing Settings	
No Answer Ring Limit	Can be default value.
Maximum Attempts	1 (should not retry again).
Abandon Call Wait Time	Can be default value.

Note: The Unified CCE dialer dials a contact only once and, is therefore, dependent on LCM for rescheduling a contact.

Retries	
No Answer Delay	Can be customer specific.
Busy Signal Delay	Can be customer specific.
Customer Abandon Delay	Can be customer specific.
Dialer Abandon Delay	No need to enter a value.
Answering Machine Delay	No need to enter a value.
Customer Not Home Delay	No need to enter a value.
Callback Settings	
Personalized Callback	Select if the campaign supports personalized call back. Key Path: HKEY_LOCAL_MACHINE\SOFTWARE\Cisco Systems, Inc.\ICM\pdins\LoggerA\BlendedAgent\CurrentVersion Key Name: PersonalCallbackMaxAttemptsDefault- It is of type DWORD Key Value: 1
Rescheduled callback mode	Check it

Campaign Purpose	
Campaign Purpose settings	
Agent Based Campaign	Can be customer specific.
Call Progress analysis	Can be customer specific.
Enable TDM AMD	
Quick Answer Detect	
Enable IP AMD	
Abandon Call	
Transfer to Agent	
Transfer to Route Point	
Terminate Tone Detect	
Transfer to IVR Campaign	
Enable IP AMD	

Abandon Call	
Transfer to IVR Route Point	
Terminate Tone Detect	
TDM Telephony Settings	
TDM Fast Voice Detect	
Query Rule Selection	
Query Rule name	
Query Rule Enable	
Local Time Range	
Start Time	
End Time	
Penetration	
Duration	
Hit Rate	
Skill Group Selection	
Skill Group	
Overflow Agents / Dialer	Not Applicable (as per Unified CCE Dialer document).
Records to Cache	
Dialed Number	
Number of IVR ports	
Route Points for Transferring to an IVR	
After AMD and for transfer to IVR Campaign	
When no agents are available	
Auto Answer Reservation Call	

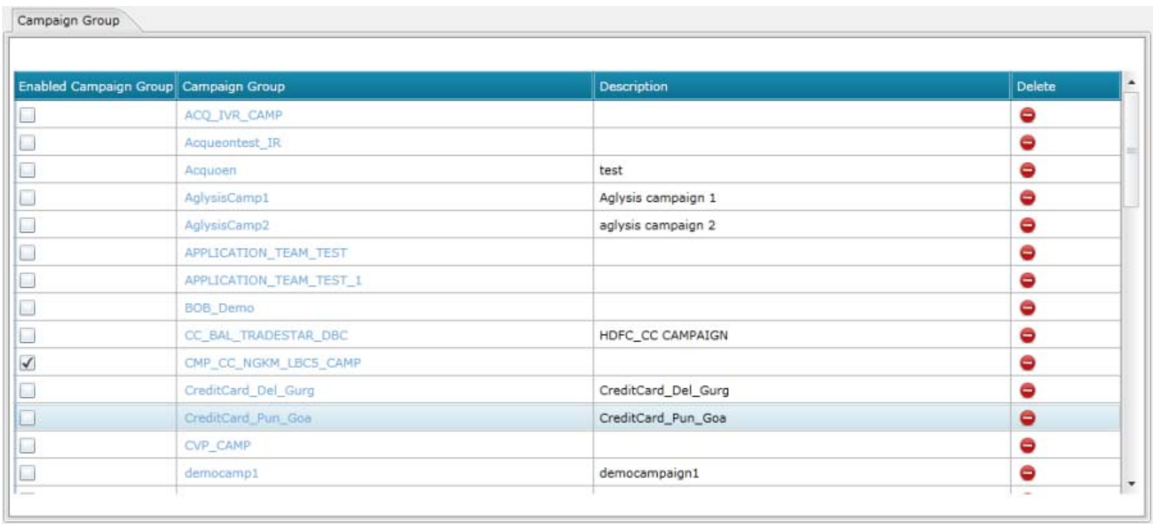
Daylight Savings Zone	
Zone 1	Only Zone 1 used for 24-hour clock.
Start	12:01 AM or the actual campaign start time.
End	11:59 PM or the actual campaign end time.
Zone 2	Zone 2 not used.
Start	
End	

4.1.3 Advantages of Campaign Groups

- You need not create multiple campaigns in the Unified CCE dialer.
- You can stop and start campaigns on LCM Console without having to create a campaign on the dialer every time you wish to start one.

Click **Groups** in the **Modules** pane on the right to open the **Campaign Groups** page as shown in Figure 4–2.

Figure 4–2 Campaign Groups - Home



Campaign Group

Enabled Campaign Group	Campaign Group	Description	Delete
☐	ACQ_IVR_CAMP		
☐	Acqueontest_IR		
☐	Acquoen	test	
☐	AglysisCamp1	Aglysis campaign 1	
☐	AglysisCamp2	aglysis campaign 2	
☐	APPLICATION_TEAM_TEST		
☐	APPLICATION_TEAM_TEST_1		
☐	BOB_Demo		
☐	CC_BAL_TRADESTAR_DBC	HDFC_CC CAMPAIGN	
☑	CMP_CC_NGKM_LBCS_CAMP		
☐	CreditCard_Del_Gurg	CreditCard_Del_Gurg	
☐	CreditCard_Pun_Goa	CreditCard_Pun_Goa	
☐	CVP_CAMP		
☐	democamp1	democampaign1	

The Campaign Groups, that is, the Unified CCE dialer campaigns are listed in the **Campaign Group** tab.

4.1.4 Creating a New Campaign Group

Click **Sync** in the **Actions** pane to synchronize your LCM Console with the Unified CCE Dialer. All campaigns running on the Unified CCE dialer are displayed as campaign groups on LCM Console.

Note: You can create new campaign groups only for email and SMS campaigns. For voice campaigns, the campaign groups are the campaigns that are running on the Unified CCE dialer.

Click **Create** in the **Actions** pane to create a new campaign group (for email and SMS campaigns only). The **Campaign Group** tab is shown in Figure 4–3.

Figure 4–3 Campaign Group - Create

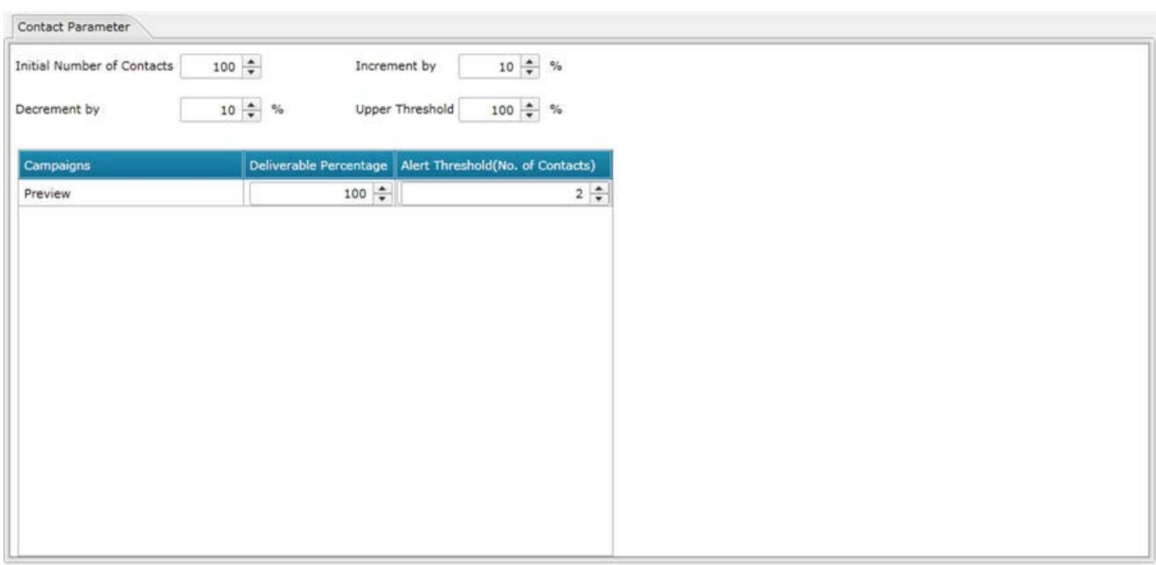
Enter a name for the campaign group in the **Campaign Group** field and a description in the **Description** field. Click **Save** in the **Actions** pane to save the information. The **Campaign Group** tab now displays the campaign group you created.

4.1.5 Contact Parameter

Contact Parameter defines the rate at which you want LCM to deliver contacts to the Unified CCE dialer. Using settings configured here, you can control contact delivery from LCM to the Unified CCE dialer, delivering contacts faster when the dialer completes dialing faster or slowing down contact delivery if the dialer is slow in completing dialing.

To set the contact parameters for a campaign group, select the **Contact Parameter** module component to open the **Contact Parameter** tab as shown in Figure 4–4.

Figure 4–4 Campaign Group - Contact Parameter



Complete the fields as shown in Table 4–1 to configure the contact parameter for the campaigns displayed.

Table 4–1 Contact Parameter - Details

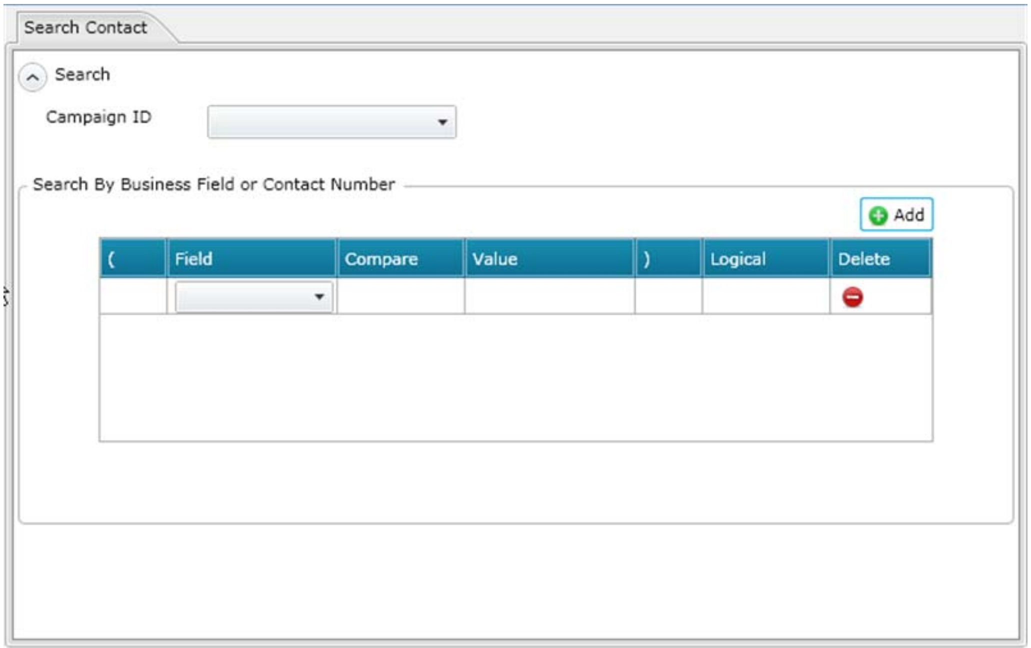
Field	Action	Description
Initial Number of Contacts	Enter a number or select from drop-down list.	The number of contacts you want to send to the Unified CCE dialer initially.
Increment by	Enter a number or select from drop-down list.	The percentage by which you want to increase the contacts that you send to the Unified CCE 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.
Decrement by	Enter a number or select from drop-down list.	The percentage by which you want to decrease the contacts that you send to the Unified CCE 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.
Upper Threshold	Enter a number or select from drop-down list.	The upper limit as a multiple of Initial Number of Contacts that can be delivered to the Unified CCE dialer.

Click **Save** in the **Actions** pane to complete configuring your contact parameters.

4.1.6 Search Contact

You can use this feature to fetch contacts based on specific criteria that you can configure in the condition builder. See Figure 4–5 for Search Contacts screen.

Figure 4–5 Search Contacts



Select a **Campaign ID** from the drop-down list to search contacts for this campaign. Click the **Add** button on the top right of the condition builder. Complete the condition builder as detailed in Table 4–2.

Table 4–2 Search Contact - Conditions

Field	Action	Description
(	Select.	An open parenthesis sign to begin the condition.
Field	Select from drop-down list.	The field for which you want to build a condition.
Compare	Select from drop-down list.	The comparison parameter for your condition. For example, > (greater than), < (lesser than), = (equals), etc. could be conditions.
Value	Enter a value.	The value on which you want to build your condition.
)	Select.	A close parenthesis sign to complete the condition.
Logical	Select from drop-down list.	The and/or logic for the condition.
Delete	Click.	A delete option that deletes the condition on the row.

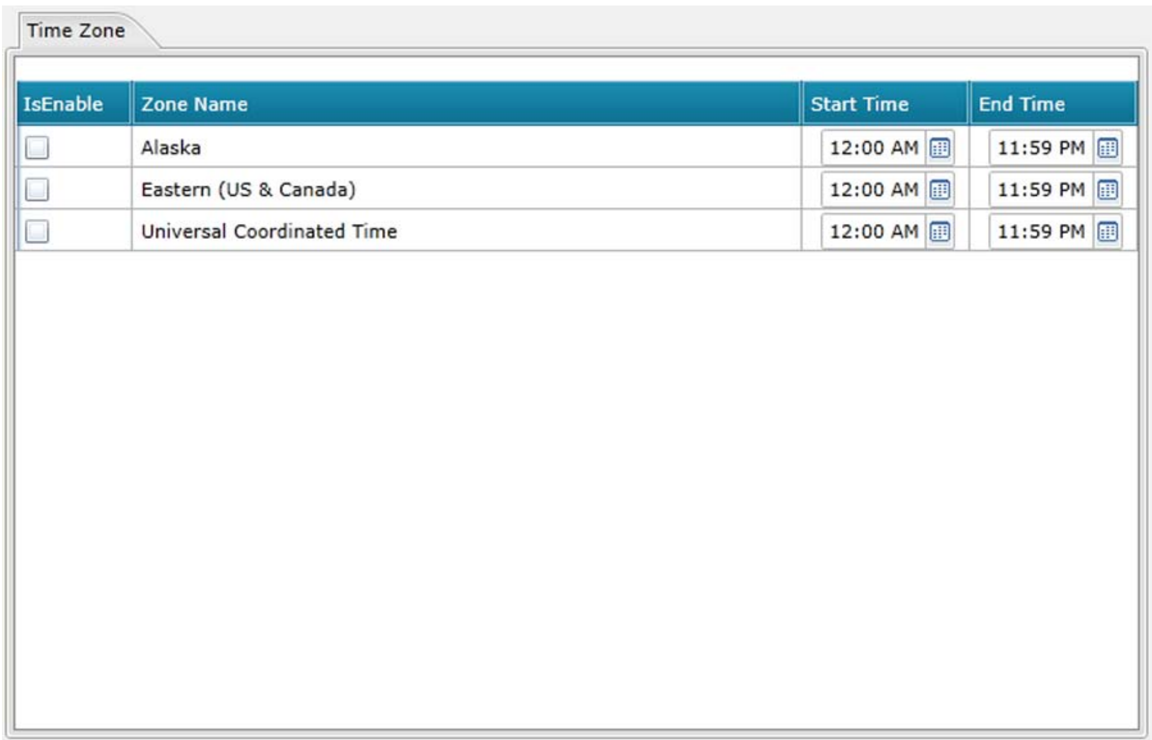
Click **Search** in the **Actions** pane to populate the contacts fetched as per the conditions that you have configured.

4.1.7 Campaign Groups - Time Zone

You can use the **Time Zone** module component to select the time zones that you want to associate with a campaign group.

Click the **Time Zone** module component to open the **Time Zone** tab as shown in Figure 4–6.

Figure 4–6 Campaign Group - Time Zone



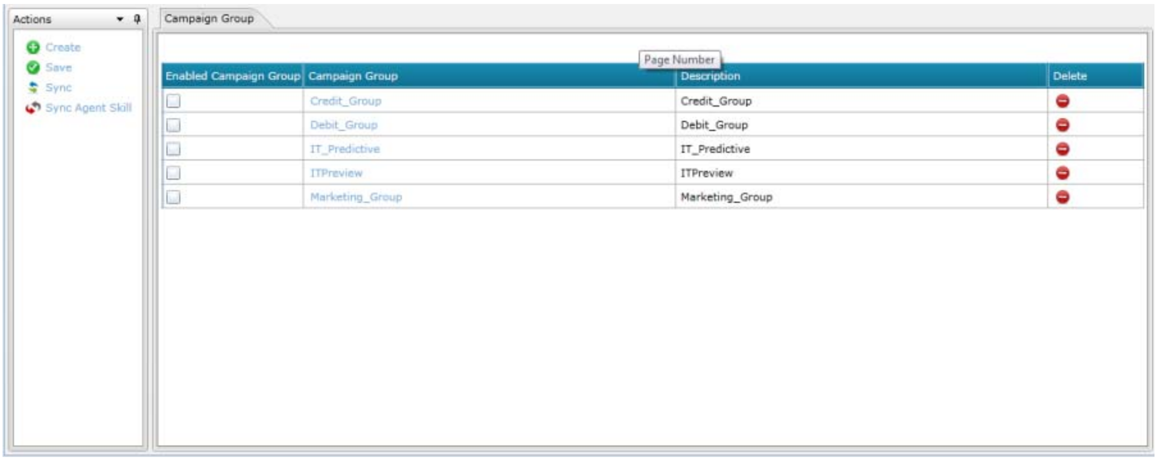
The time zones that you have selected are populated in the work area. Select the appropriate checkboxes from the **Is Enable** column to associate to your campaign group. Click **Save** in the **Actions** pane to save the configuration.

4.1.8 Campaign Groups - Sync Agent Skill

Just as you can synchronize campaigns on the dialer as campaign groups on LCM Console, you can also synchronize agent skills. All agent skills are normally available on the dialer database.

The Campaign Group home page is shown in Figure 4–7.

Figure 4–7 Campaign Group - Home



Click **Sync Agent Skill** in the **Actions** pane to synchronize the dialer agent skill details to LCM Console.

4 .2 Campaigns

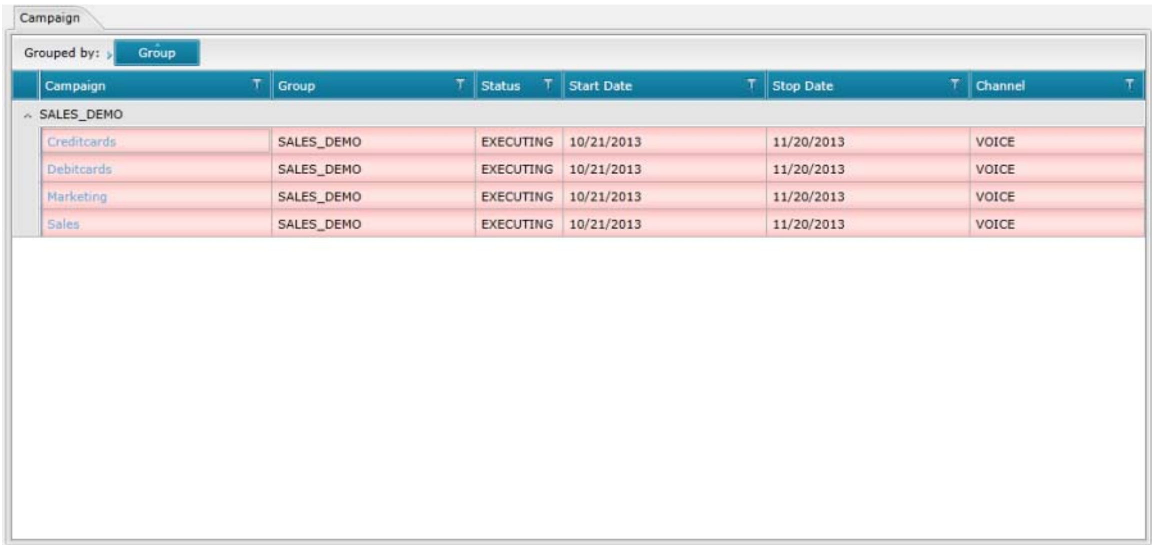
You can use a campaign to manage contacts, upload contacts, and deliver contacts to the Unified CCE dialer. The dialer, in turn, places the calls to customers and connects the live calls to the agents. You can only create voice campaigns on the Unified CCE dialer. On LCM Console, you can also create Email and SMS campaigns. You can use the **Campaign** module to perform the following tasks:

- Manage campaigns
- Configure business parameters
- Configure contact selection strategies
- Configure campaign chaining
- Upload contacts
- List Information
- Scrub contacts
- Manage contacts
- Configure campaign holidays
- Schedule a campaign
- Re-assign agents to a campaign
- Configure server scripts
- Build expressions for a contact selection strategy
- Create categories based on outcomes and set targets

- Create Email/SMS templates for use in campaigns.

Click the icon for the **Campaign** module to start configuring a campaign.The **Campaign** tab is shown as in Figure 4–8.

Figure 4–8 Campaign



You can see the following details listed in the **Campaign** tab:

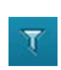
- **Campaign:** The campaigns under each campaign group.
- **Group:** The campaign groups available in LCM Console.
- **Status:** The campaign status like Executing, Created, etc.
- **Start Date:** The campaign start date.
- **Stop Date:** The campaign end date.
- **Channel:** The channel for which the campaign is configured.

You can also drag one or more column headers to the **Grouped by** panel above the column headers to group the campaigns accordingly.

Using Filters

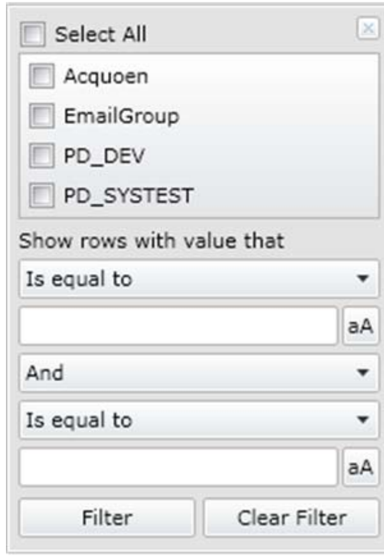
You can also filter the listed data by clicking the filter icon, shown in Figure 4–9, in each column header.

Figure 4–9 Filter Icon



The filter popup appears as shown in Figure 4–10.

Figure 4–10 Filter Criteria



You can filter the data you want displayed in multiple ways as listed below:

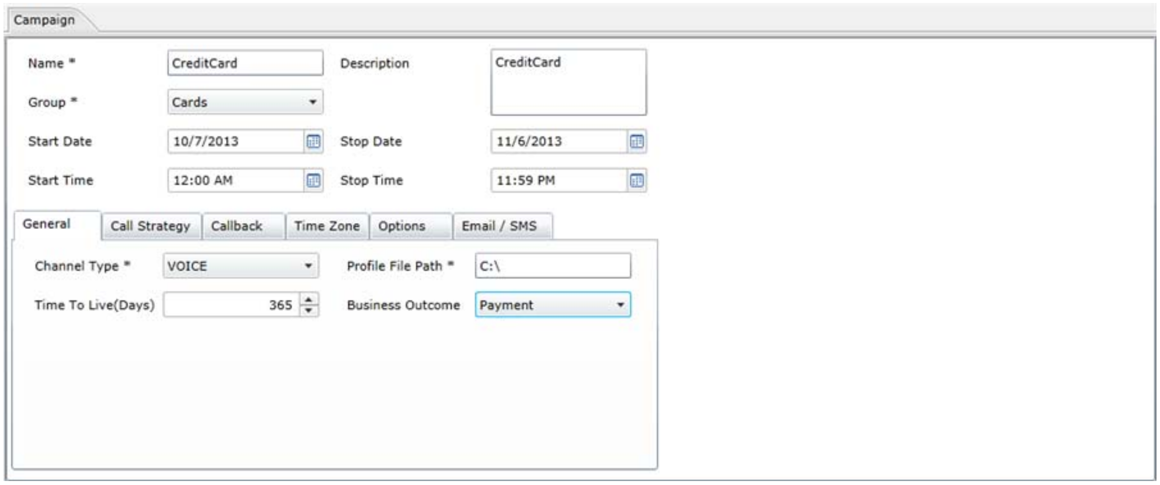
- Select the **Select All** checkbox if you want all the items displayed.
- Select an appropriate checkbox to display data based on your filter selection.
- Select an appropriate condition from the first **condition** drop-down list, and enter text in the **textbox**. Select **And** or **Or** from the drop-down. Select another appropriate condition from the second **condition** drop-down list. Click **Filter** to see the data listed as per your filter criteria.

Click the **Clear Filter** button to clear all the filters and see the complete data.

4.2.1 Creating a Campaign

To create a new campaign, click **Create** in the **Actions** pane. The **Campaign** tab displays the fields required for a new campaign, as shown in Figure 4–11.

Figure 4–11 Campaign - Create



Complete the fields as shown in Table 4–3.

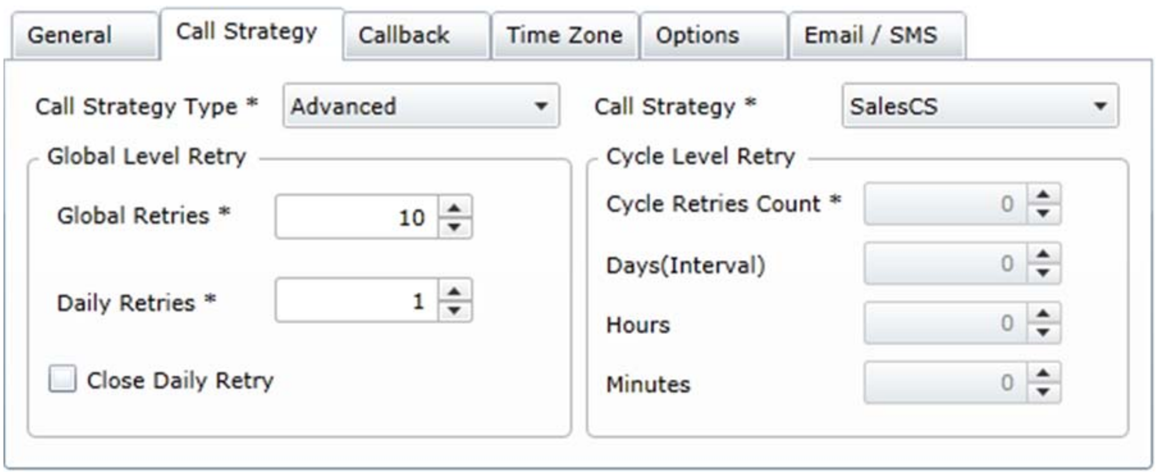
Table 4–3 Create Campaign - Details

Field	Action	Description
Name	Enter a name.	A name for the new campaign you want to create.
Description	Enter a description.	A brief description for the campaign.
Group	Select from drop-down list.	The campaign group you want to associate the new campaign to.
Start Date	Enter a date or select from popup panel.	The date on which you want your new campaign to commence.
Stop Date	Enter a date or select from popup panel.	The date on which you want your new campaign to end.
Start Time	Enter a time or select from popup panel.	The time at which you want your new campaign to commence every day.
Stop Time	Enter a time or select from popup panel.	The time at which you want your new campaign to end every day.
General		
Channel Type	Select from drop-down list.	The channel on which your new campaign will run – Voice, SMS, or Email.
Profile File Path	Enter a file path.	Path in which to place the profile file.

Field	Action	Description
Time to Live (Days)	Enter a number.	The number of days the contacts uploaded for this campaign are live. This is applicable for contacts that are uploaded via auto upload.
Business Outcome Group	Select from drop-down list.	The business outcome group that you want to apply for this campaign.

Click the **Call Strategy** sub tab to display the fields as shown in Figure 4–12.

Figure 4–12 Campaign - Call Strategy



Complete the fields as listed in Table 4–4.

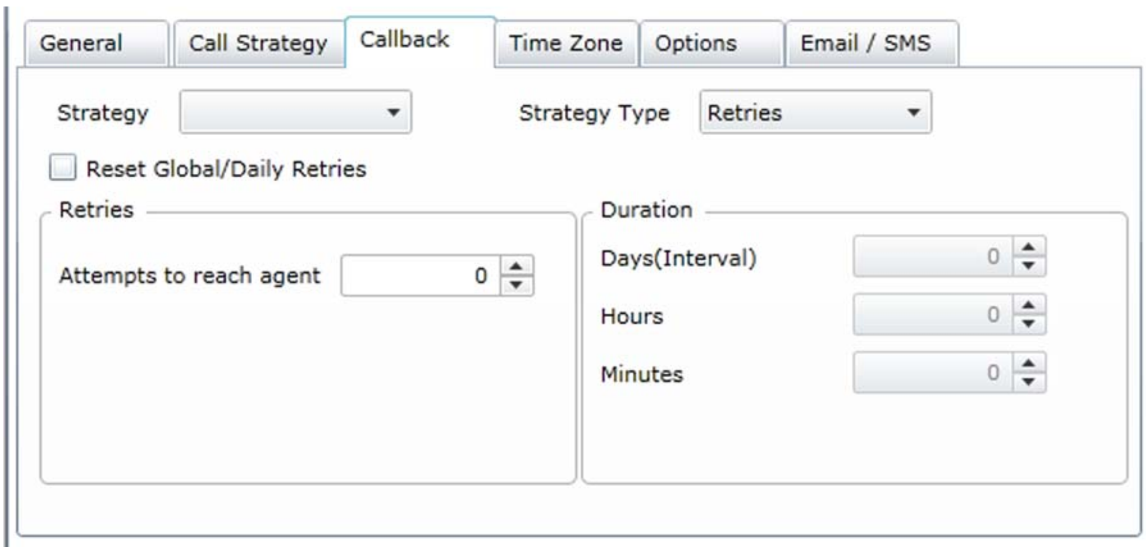
Table 4–4 Call Strategy - Details

Field	Action	Description
Call Strategy Type	Select from drop-down list.	The call strategy type for this campaign. Available options are Simple and Advanced.
Call Strategy	Select from drop-down list.	The call strategy that you want to apply to this campaign.
Global Level Retry		
Global Retries	Select or enter a number.	The maximum number of retries that can be made for dialing each contact in the campaign. However, the number of retries on each day of the campaign is subject to the limit you configure in the **Daily Retries** field.
Daily Retries	Select or enter a number.	The number of retries that can be made for dialing each contact in a day for this campaign.

Field	Action	Description
Close Daily Retry	Select checkbox.	To close a contact once your daily retry limit is reached, even if **Global Retries** allows more attempts to reach the contact.
Cycle Level Retry		
Cycle Retries Count	Select or enter a number.	The number of retry cycles allowed for this campaign.
Days (Interval) Hours Minutes	Select or enter a number.	The reschedule interval between a completed cycle and the next cycle.

Click the **Callback** sub tab to display the fields as shown in Figure 4–13.

Figure 4–13 Campaign - Callback



Select the **Enable** checkbox to select your callback strategy. Complete the fields as listed in Table 4–5.

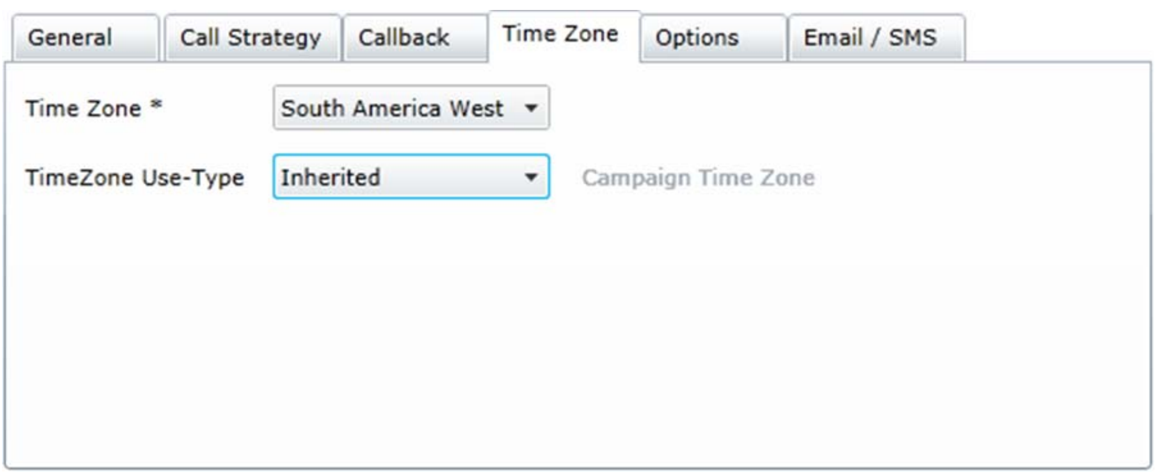
Table 4–5 Callback Strategy - Details

Field	Action	Description
Strategy	Select from drop-down list.	The callback strategy that you want to apply for this campaign.

Field	Action	Description
Strategy Type	Select from drop-down list.	The strategy type that you want to apply. Available options are: • **Retries**: The number of retries after which a personal callback becomes a normal callback. • **Duration**: The duration after which a personal callback becomes a normal callback.
Reset Global/Daily Retries	Select checkbox.	Selecting this checkbox resets the retries (global/daily, as selected) for the campaign.
Retries		
Attempts to reach agent	Select or enter a number.	The number of retries after which a personal callback becomes a normal callback.
Duration		
Days (Interval) Hours Minutes	Select or enter a number.	The duration in **Days**, **Hours**, and **Minutes** after which a personal callback becomes a normal callback.

Click the **Time Zone** sub tab to display the fields as shown in Figure 4–14.

Figure 4–14 Campaign - Time Zone

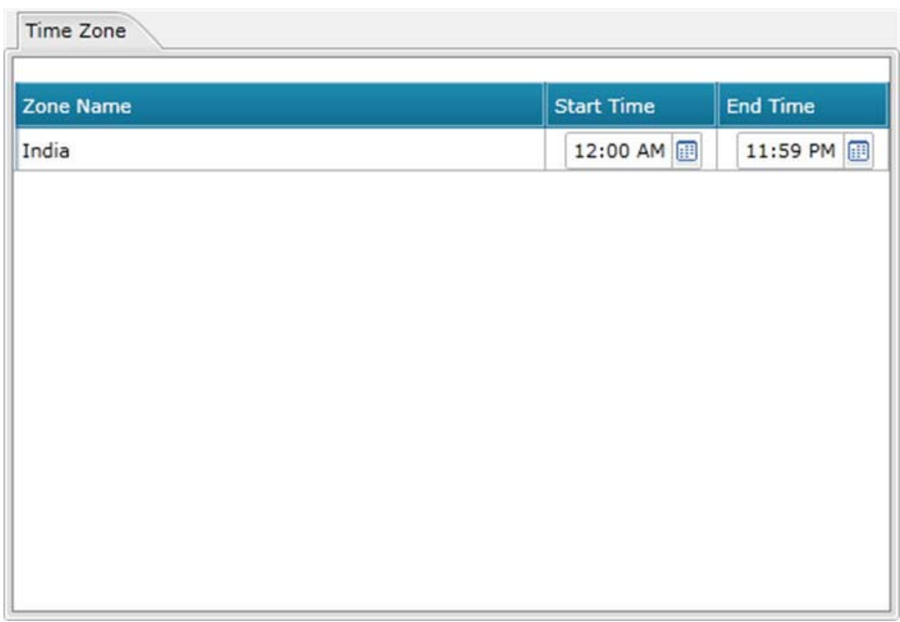


Complete the fields as listed in Table 4–6

Table 4–6 TimeZone - Details

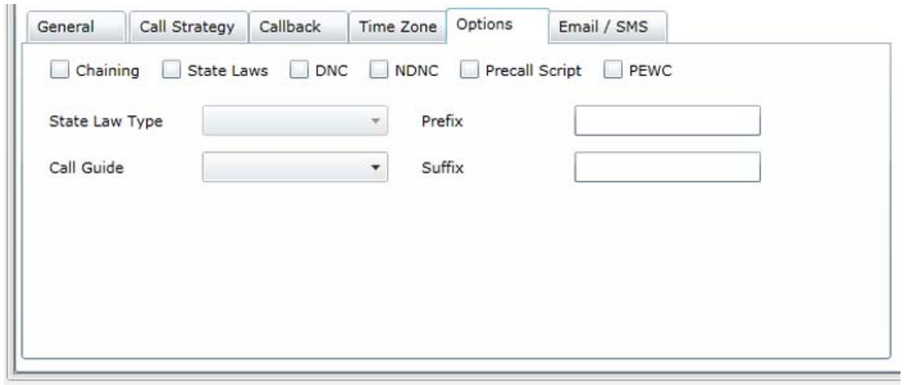
Field	Action	Description
Time Zone	Select from drop-down list.	The default time zones for this campaign. The time zones you selected in System Configuration are available for selection. **Note:** The application uses this time zone during contact uploads, if you choose Campaign Specific Time Zone. See Table 4–20 for more details.
TimeZone Use-Type	Select from drop-down list.	Select how you use the Time Zone for this campaign. Available options are: • **None**: Takes time zones as selected in System Configuration. • **Inherited**: Takes time zones as selected in the Campaign Group. • **Override**: For this campaign alone, override only **Start** and **End** times configured for the time zones in this Campaign Group. The start and end times are seen when you click **Load Default** from the **Actions** pane in Figure 4–15.

Figure 4–15 Campaign Time Zone - Override



Click the **Options** sub tab to display the fields as shown in Figure 4–16.

Figure 4–16 Campaigns - Options



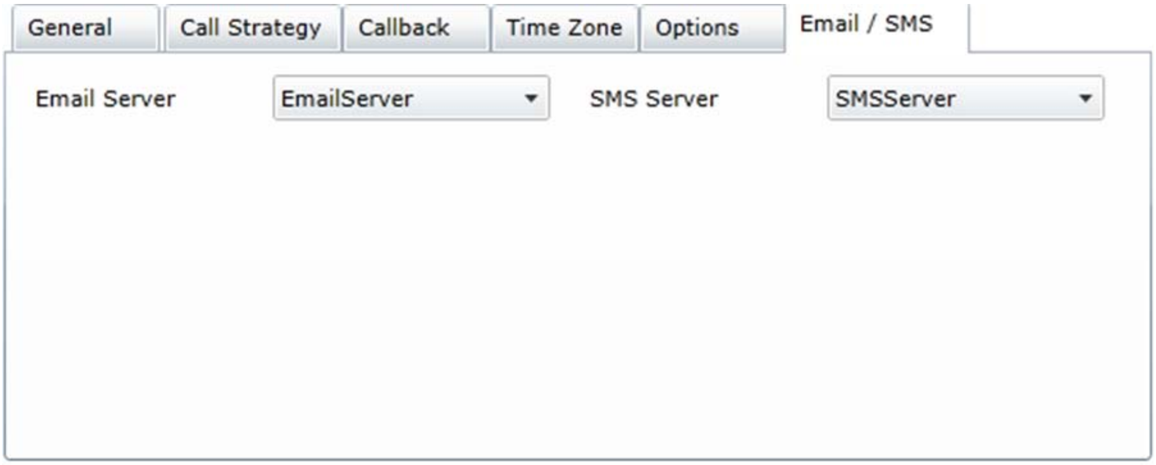
Complete the fields as listed in Table 4–7.

Table 4–7 Options - Details

Field	Action	Description
Chaining	Select checkbox.	The choice to chain a contact to a different campaign.
State Laws	Select checkbox.	The applicability of configured state/geographical laws to this campaign.
DNC	Select checkbox.	To mark the contacts as DNC.
NDNC	Select checkbox.	To mark the contacts as NDNC.
Precall Script	Select checkbox.	To execute a precall script for a specific campaign.
PEWC	Select checkbox.	To deliver only PEWC contacts to the dialer.
State Law Type	Select from drop-down list.	The applicability of configured state/geographical laws to areas covered by a geographical state, area code, or a zip code.
Call Guide	Select from drop-down list.	The pre-configured call guide that you want your agents to use for this campaign.
Prefix	Enter details.	The prefix that goes along with the contact.
Suffix	Enter details.	The suffix that goes along with the contact.

Click the **Email / SMS** sub tab to display the fields as shown in Figure 4–17.

Figure 4–17 Campaign Email/SMS



Complete the fields as listed in Table 4–8.

Table 4–8 Email / SMS- Details

Field	Action	Description
Email Server	Select from drop-down list.	The Email server that you want to map for this campaign.
SMS Server	Select from drop-down list.	The SMS server that you want to map for this campaign.

Click **Save** in the **Actions** pane. Your new campaign is listed in the refreshed **Campaign List** tab.

To exit without saving, click **Home** in the **Actions** pane.

To modify a campaign, select the campaign you want to modify. The campaign details are displayed in the **Campaign** tab. Make the required changes and click **Save** in the **Actions** pane to update the changes. A dialog box confirming the update disappears in a few seconds.

To delete a campaign, select the campaign you want to delete. The campaign details are displayed in the **Campaign** tab. Click **Delete** in the **Actions** pane to delete the campaign. A dialog box confirming the delete disappears in a few seconds.

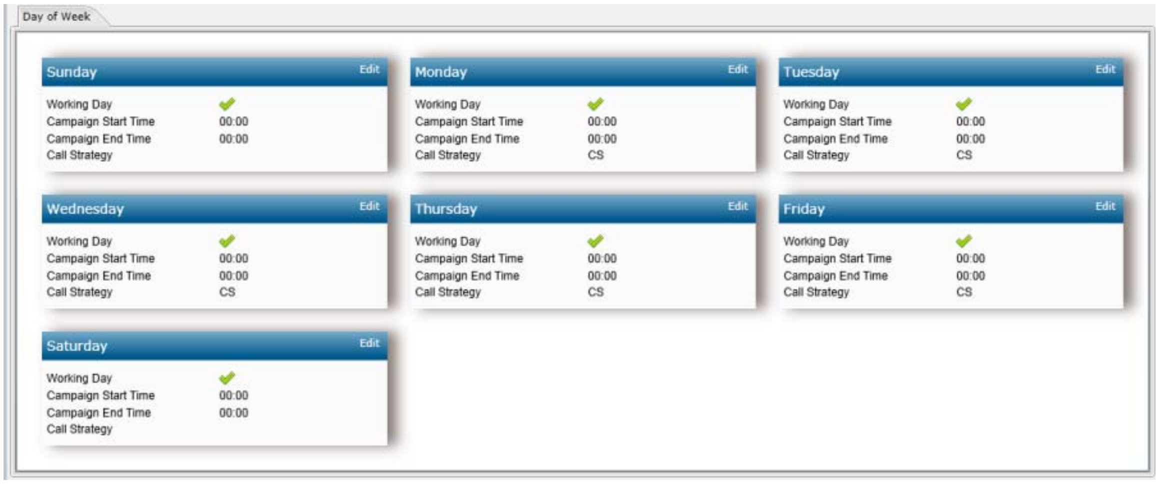
4.2.2 Day of Week

Note: **Day of Week** is enabled only if your campaign call strategy type is **Advanced**.

You can specify, for each day of the week, off days for a campaign, campaign start and end times, and the call strategy to use for a campaign using the Day Of Week functionality.

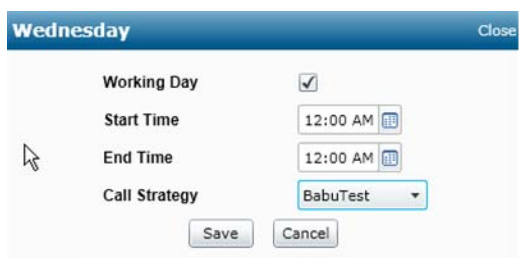
Click **Day Of Week** icon on the module component to open the **Day Of Week** tab as shown in Figure 4–18.

Figure 4–18 Day Of Week



The **Day Of Week** tab shows all seven days of the week and campaign details. To configure the details that you can using this functionality, click **Edit** against the day of the week you wish to modify. This pops up the campaign details in editable mode as shown in Figure 4–19.

Figure 4–19 Day Of Week - Details



Complete the fields as shown in Table 4–9 to configure the contact parameter for the campaigns displayed.

Table 4–9 Day Of Week - Details

Field	Action	Description
Working Day	Select checkbox.	The day that this campaign will run - the working day for this campaign.
Campaign Start Time	Select from pop up date panel.	The time at which you want your campaign to commence.
Campaign End Time	Select from pop up date panel.	The time at which you want your campaign to end.

Field	Action	Description
Call Strategy	Select from drop-down list.	The Call Strategy that this campaign should follow.

Click the **Save** button to save the information. To exit without saving, click **Cancel**.

To configure these details for all days of the week, select the days one by one, click **Edit** and enter details in Table 4–9 for each day and save details.

4.2.3 Business Parameter

You can use the Business Parameter module component to create business-specific data. You can associate this business-specific data to a contact when you upload contacts to LCM. You can also define custom data (data defined in the Unified CCE import rule) here. Agents view a screen pop containing this data on their desktops.

Note: You can use the business parameters configured here for mapping purposes in the following screens:

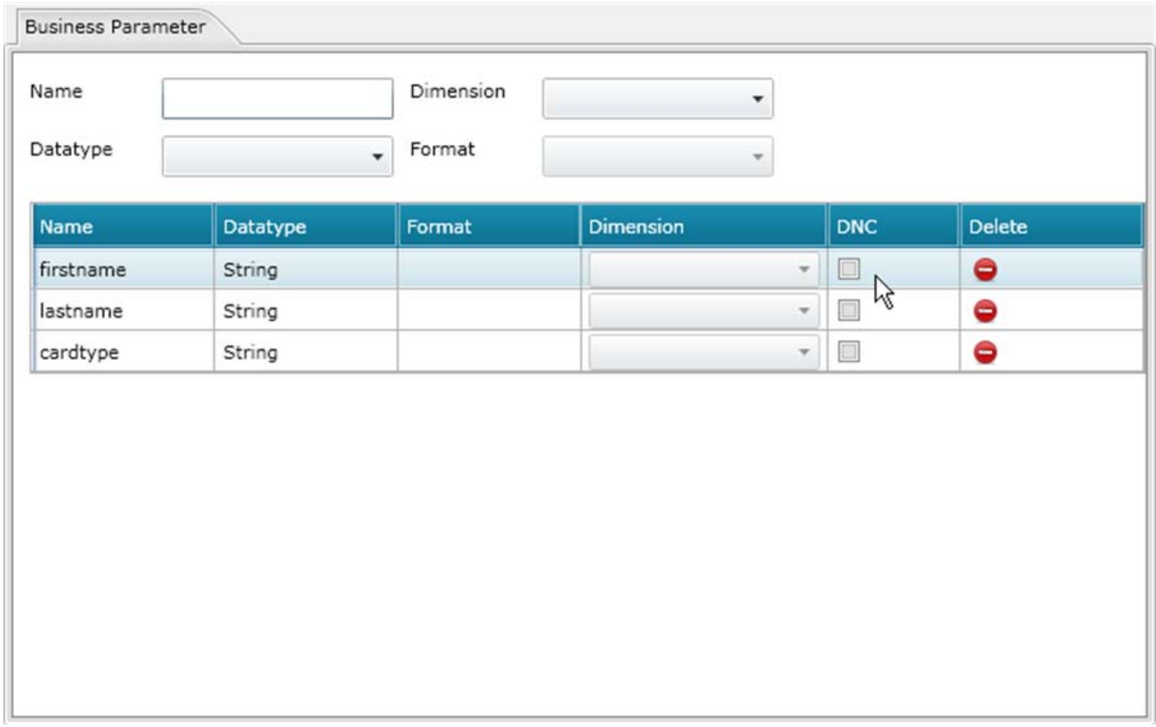
- Contact Selection Strategy – Use these business fields to define custom conditions.
- Scrub contacts – Map the business fields to use when you scrub contacts.
- Upload contacts – Map the business fields for contacts upload.
- Manage contacts – Queries all the business fields mapped for that campaign

You can create 25 business fields in all, including the mandatory fields from the Unified CCE. For example, if there are four fields that you want to use from the Unified CCE, then you can create another 21 business fields.

Note: You must use the exact field names for fields that you map to the Unified CCE fields.

Click the **Business Parameter** icon from the module component to open the **Business Parameter** tab in the work area as shown in Figure 4–20.

Figure 4–20 Business Parameter



Complete the fields as listed in Table 4–10.

Table 4–10 Business Parameters - Details

Field	Action	Description
Name	Enter a name for the field.	A business parameter field name. **Note:** If this field is mapped to a Unified CCE field, the field name must be identical to that on the Unified CCE.
Dimension	Select from drop-down list.	A dimension to group this business parameter under.
Data Type	Select from drop-down list.	The field type for this field. Possible values are Number, Float, DateTime, and String.
Format	Select from drop-down list	The format in which you want the date and time. **Note:** This field is enabled only if the Data Type is DateTime.
DNC	Right-click on the row to select.	Select **Mark DNC** to mark a business field as DNC. You can select only one field. To clear an already marked business field, right-click and select **UnMark DNC**.

Click **Create** in the **Actions** pane after you have completed the above fields. The business parameter you just created is listed in the **Business Parameter** tab. A dialog box confirming the new entry disappears after a few seconds.

Click **Clear** in the Actions pane to clear any data without saving.

Click the **Delete** icon alongside each entry to delete any field. A dialog box confirming the deletion disappears after a few seconds.

Note: You cannot modify a business field. You have to delete and create a new one again.

4.2.4 Contact Selection Strategy

A contact selection strategy (CSS) defines how you prioritize your contacts in an LCM campaign for calling. 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 LCM Console pushes a specific percentage or number of Platinum contacts and/or Gold and Silver contacts.

As soon as you have created and saved a campaign, all the module components for this campaign are enabled. You have to configure a CSS for this campaign.

The three system conditions perform the task as listed in Table 4–11.

Table 4–11 System Conditions Overview

System Condition	Description
Contact Priority Calls – New Contacts	These are contacts that LCM has not delivered to the Unified CCE dialer from the latest upload to the oldest upload.
Contact Priority Calls – Old Contacts	These are contacts that have not been delivered to the Unified CCE dialer from old uploads.
Specific Moment	Contacts that you have rescheduled to be dialed out at a specific moment.
Specific Agent	Contacts that have been tagged to be dialed out to reach a specific agent.
Specific Agent with Specific Moment	Tagged contacts that have been rescheduled to be dialed out to reach a specific agent at a specific moment.

4.2.4.1 Prioritizing CSS Conditions

LCM Console delivers contacts satisfying the conditions in the first row first and move on the second row next and so on.

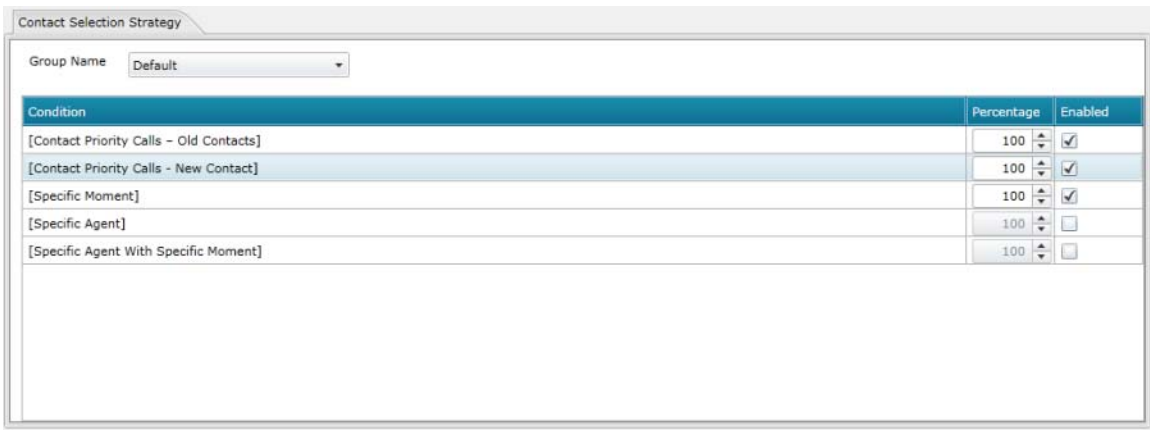
You can create more custom conditions and prioritize these as you desire. You can have a custom condition as a first priority followed by a system condition. Drag and drop the conditions to the desired priority to prioritize your LCM Console deliver contacts.

Click the **CSS** module component icon. The **Contact Selection Strategy** tab opens as shown in Figure 4–21. You can see the system conditions listed in the work area. You can add or edit more conditions to optimize your campaign. These conditions are custom conditions.

4.2.4.2 Creating a CSS Group

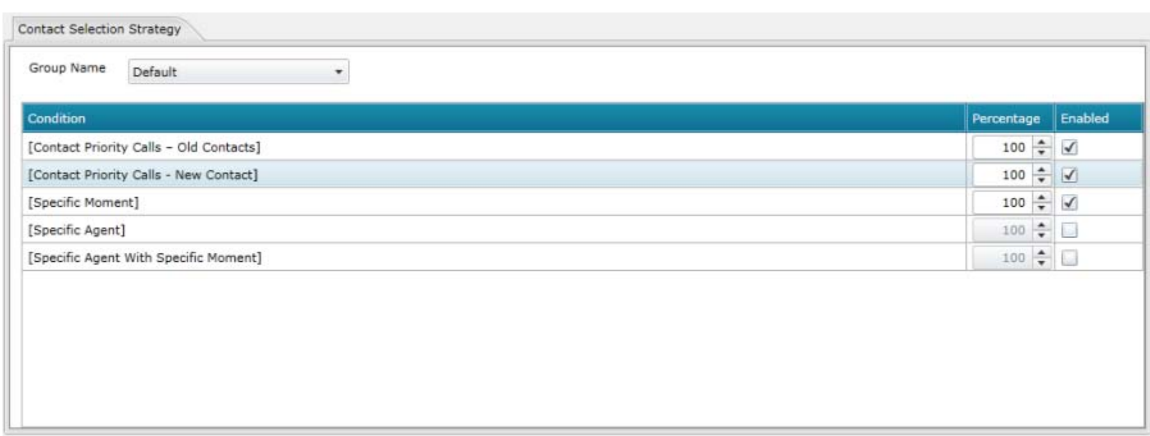
In Figure 4–21, click **Create Group** in the **Actions** pane. Enter a **Group Name** and click **Save** in the **Actions** pane to save the newly created group. You can now configure a desired CSS.

Figure 4–21 Contact Selection Strategy



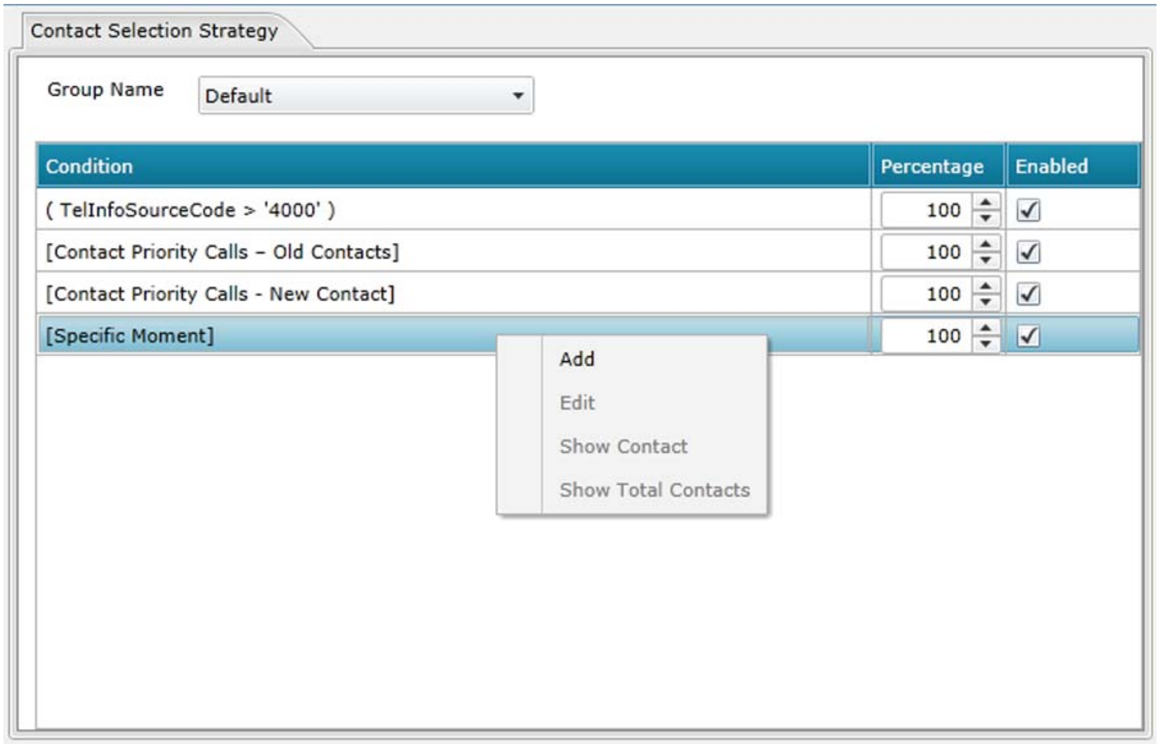
From Figure 4–22, select a **Group Name** from the drop-down list. The CSS you configure will be applicable to this group. The system conditions load in the work area as shown in Figure 4–22.

Figure 4–22 Contact Selection Strategy - Create Group



Right-click any of the system conditions. Click **Add** to add more custom conditions.You can build conditions to add to your strategy by using the condition builder as shown in Figure 4–23.

Figure 4–23 Contact Selection Strategy - Add Conditions



Click the Add option from the popped-up context menu. Complete building the custom conditions as shown in Figure 4–24, using information in Table 4–12.

Figure 4–24 Contact Selection Strategy - Condition Builder

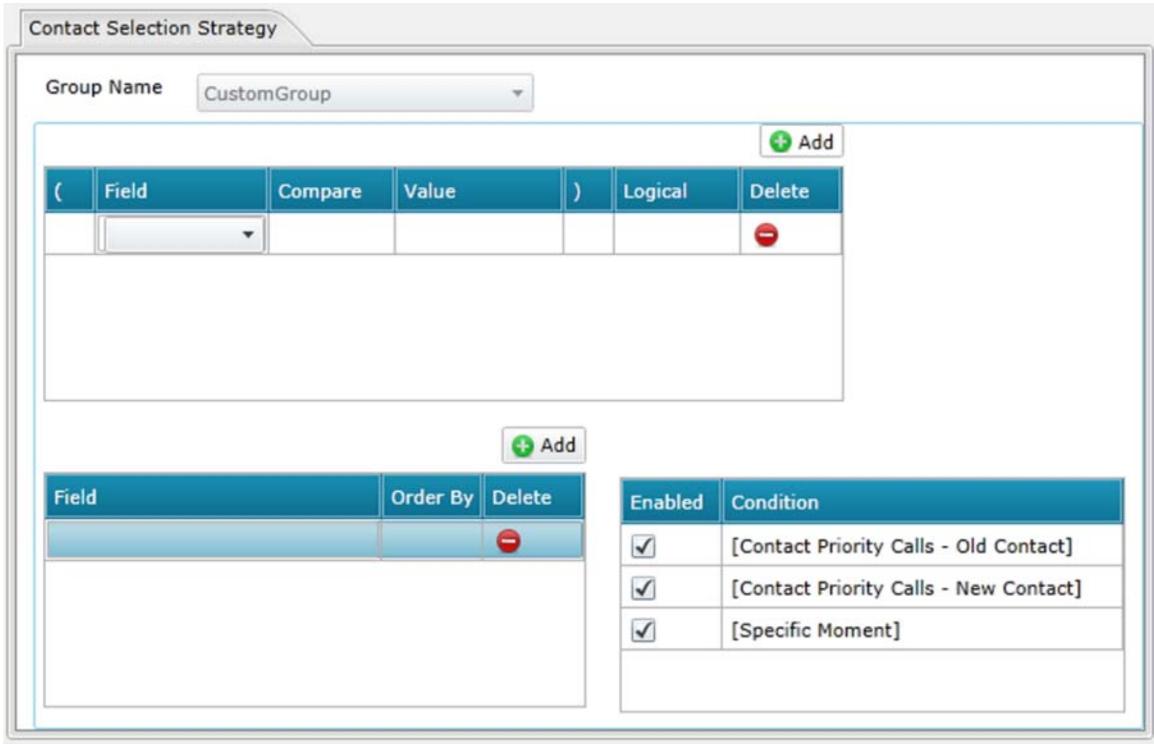


Table 4–12 Contact Selection Strategy - Custom Condition Builder

Field	Action	Description
(	Enter **(**	An open parenthesis sign to begin the condition.
Field	Select from drop-down list.	The field for which you want to build a condition.
Compare	Select from drop-down list.	The comparison parameter for your condition. For example, > (greater than), < (lesser than), = (equals), etc. could be conditions.
Value	Enter a value.	The value on which you want to build your condition.
)	Enter)	A close parenthesis sign to complete the condition.
Logical	Select from drop-down list.	The and/or logic for the condition.
Delete	Click.	A delete option that deletes the condition on the row.

You can add more fields and order them using the panel in the lower half of the work area. Complete the fields as shown in Table 4–13.

Table 4–13 Contact Selection Strategy - Adding Fields

Field	Action	Description
Field	Select from drop-down list.	The field for which you want to impose an Order By condition.
Order By	Select from drop-down list.	The order by which you want the contacts to be delivered to the dialer – ascending or descending.
Delete	Click.	A delete option that deletes the condition on the row.

Click **Apply** in the **Actions** pane to update your changes. A dialog box confirming the update will disappear in a few seconds.

Click **Cancel** in the **Actions** pane to undo all changes and revert your CSS to the pre-modified state.

Click the **CSS** module component icon again and select your CSS group from the drop-down list in the **Contact Selection Strategy** tab, you can see the custom conditions added to the system conditions. You can change the priority for your CSS conditions. Refer Figure 4–21 to see the **Contact Selection Strategy** page.

The system conditions are displayed first, followed by the custom conditions. The fields are described in Table 4–14.

Table 4–14 Contact Selection Strategy - Fields

Field	Action	Description
Condition	Drag and drop to the desired location based on the priority you require for a condition.	Contacts are delivered to dialer based on the conditions defined. LCM accumulates contacts based on these conditions and delivers as soon the required number of contacts is reached.
Percentage	Select or enter the percentage.	The percentage of contacts you want delivered to the Unified CCE dialer for this condition.
Enabled	Select checkbox.	If selected, the application takes cognizance of this condition to deliver the contacts.

Click **Save** in the **Actions** pane to save your changes. A dialog box confirming the save will disappear in a few seconds.

Click **Remove Group** in the **Actions** pane to remove a configured CSS group.

Click **Cancel** in the **Actions** pane to undo all changes and revert your CSS to the pre-modified state.

Click **Save & Refresh** in the **Actions** pane to deliver contacts afresh as per the new CSS conditions. This action closes all contacts delivered as per the old CSS conditions.

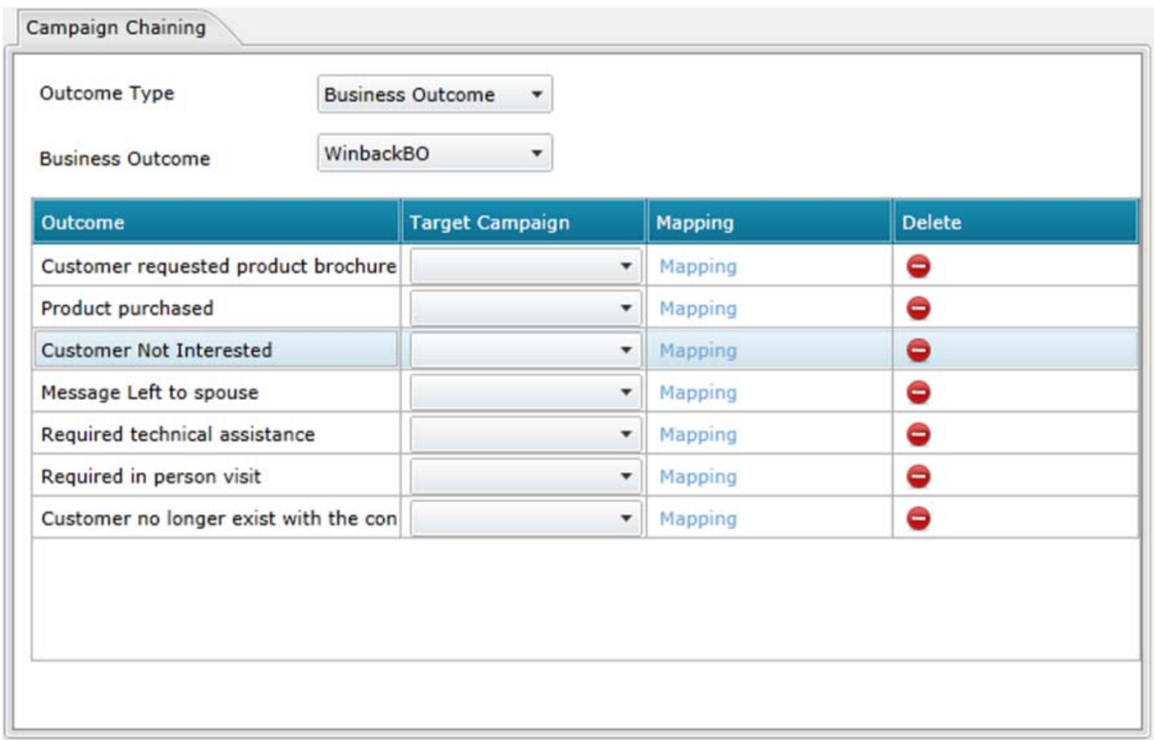
4.2.5 Chaining

Campaign chaining is a facility using which you can re-allocate closed contacts from one campaign to another, based on your business requirements.

Campaign chaining can happen either on business outcome or on telephony outcome. You have to configure the chaining rules in LCM Console for contacts to be chained from one campaign to another.

To configure campaign chaining rules, click the **Chaining** icon in the module component. The **Campaign Chaining** tab opens as shown in Figure 4–25.

Figure 4–25 Campaign Chaining



Complete the fields shown in Table 4–15.

Table 4–15 Campaign Chaining - Details

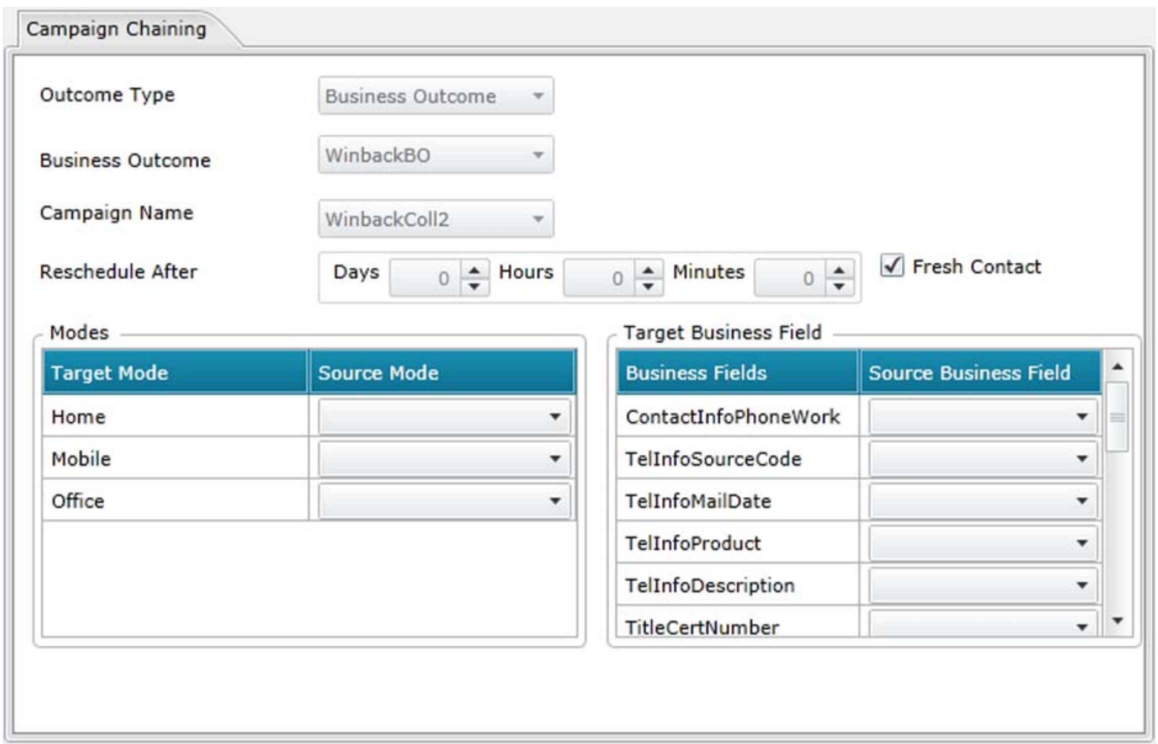
Field	Action	Description
Outcome Type	Select from drop-down list.	The outcome type for which you want to chain contacts to a different campaign.

Field	Action	Description
Business Outcome	Select from drop-down list.	The outcome group that you want to select for chaining contacts.
Target Campaign	Select from drop-down list.	The destination campaign to which you want to chain a contact.

4.2.5.1 Chaining Type – Business Outcome

After completing the fields, click **Mapping** in the grid to map the chaining details. The Mapping screen now opens in the **Campaign Chaining** tab as shown in Figure 4–26.

Figure 4–26 Campaign Chaining - Mapping



The **Outcome Type**, **Business Outcome**, and **Campaign Name** are populated with values you selected before mapping. Complete the fields in Table 4–16 and Table 4–17 to chain contacts to a campaign.

Table 4–16 Campaign Chaining - Mode Mapping

Field	Action	Description
Reschedule After		
Days Hours Minutes	Select from panel or enter value.	The time at which the contact is dialed next, in the target campaign, after successful campaign chaining.

Field	Action	Description
Fresh Contact	Select checkbox.	Select 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.
Target Mode	No selection required.	The target mode that you want to chain the contact.
Source Mode	Select from drop-down list.	The source mode of the contact you want to chain.

Table 4–17 Campaign Chaining - Business Field Mapping

Field	Action	Description
Business Field	No selection required.	The target business field that you want to chain the contact to.
Source Business Field	Select from drop-down list.	The source business field of the contact you want to chain is populated.

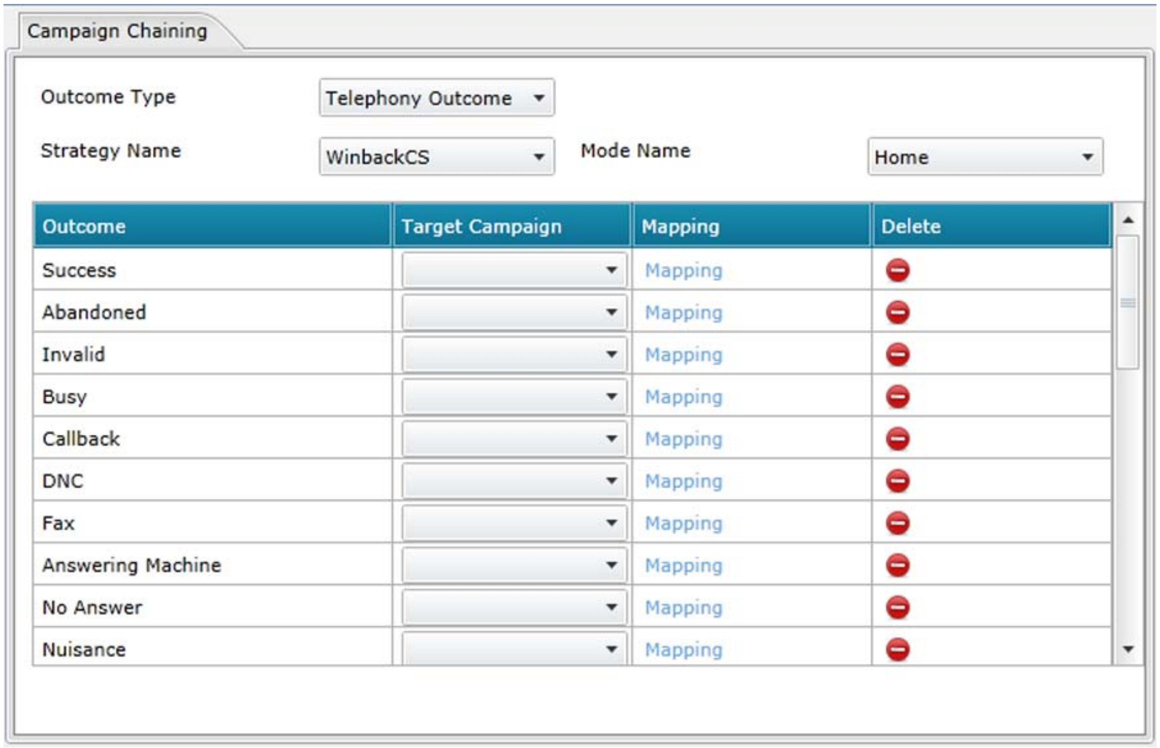
Click **Save** in the Actions pane to update your changes. If you want to make changes before committing the updates, click **Cancel**.

Click the **Delete** icon against each entry to delete any mapping details.

4.2.5.2 Chaining Type – Telephony Outcome

In the **Campaign Chaining** tab, select **Telephony Outcome** in the **Outcome Type** drop-down list. Select **Strategy Name** and **Mode Name** from the drop-down lists. The Chaining screen is populated as shown in Figure 4–27.

Figure 4–27 Campaign Chaining - Telephony Outcome



Select a **Target Campaign** from the drop-down list. Click **Mapping** to map the chaining details. Refer Table 4–16 and Table 4–17 to complete mapping.

4.2.6 Upload Contacts

You can upload contacts to LCM from a file or a database. Based on various other configurations, LCM delivers these contacts to the Unified CCE dialer for dialing.

You can upload contacts from any of the following sources:

- Formatted file
- Database Tables
- Database Views

4.2.6.1 Formatted File Upload

Click **Upload Contacts** in the module component to open the **Contact Upload** tab as shown in Figure 4–28.

Figure 4–28 Upload Contacts - Formatted File

Complete the **Import Details** section with details as in Table 4–18.

Table 4–18 Upload Contacts - Formatted File

Field	Action	Description
Source Type	Select **Formatted File** from drop-down list.	The source type from which you want to upload contacts.
Delimiter	Select from drop-down list.	The delimiter used in your file to separate various fields in a record, if it is not a comma-separated file.
Import File	Enter the file path or browse to select.	The path where you have placed the file containing contacts.
Profile Name	Select from drop-down list.	The profile name, configuration as per which contacts in this file are uploaded.

Click **Upload** in the **Actions** pane if you want to upload contacts as configured in the profile you selected.

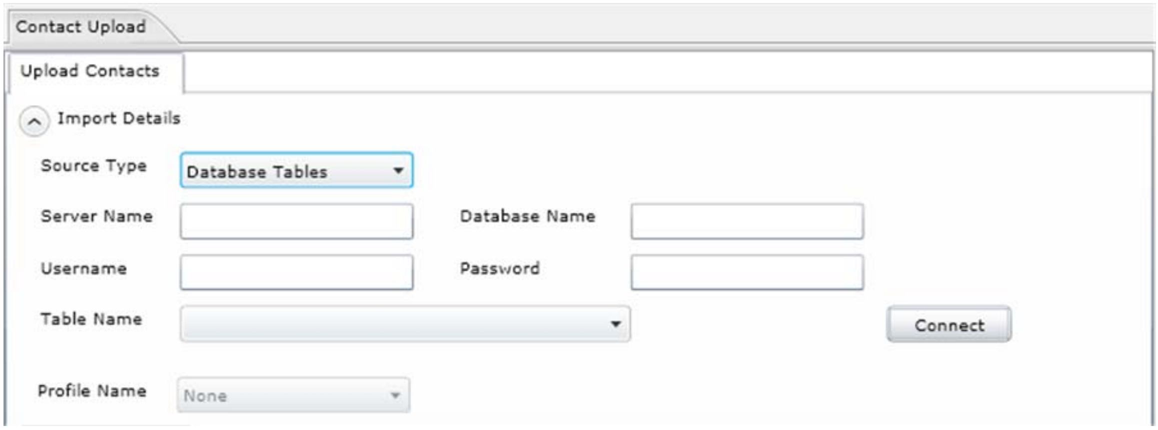
If you have changes to make to the profile, make those changes by completing the complete fields mentioned in Table 4–20, Table 4–21, and Table 4–22 to configure how your contacts are uploaded.

4.2.6.2 Database Upload

You can also upload contacts from a database table or a database view.

Click **Upload Contacts** in the module component to open the **Contact Upload** tab as shown in Figure 4–29. Select **Database Tables** or **Database Views** from the **Source Type** drop-down list.

Figure 4–29 Upload Contacts from Database



Complete the **Import Details** section with details as shown in Table 4–19.

Table 4–19 Upload Contacts - Database

Field	Action	Description
Source Type	Select **Database Tables** or **Database Views** from drop-down list.	The source type from which you want to upload contacts.
Server Name	Enter a value.	The server name or the IP address where the database containing the contacts for upload is placed.
Database Name	Enter a value.	The database name where the table containing contacts for upload is available.
Username	Enter a value.	The database username where the table containing contacts for upload is available.
Password	Enter a value.	The password for accessing the database where the table containing contacts for upload is available. **Note:** Before proceeding further, click the **Connect** button to connect to the database using the credentials provided.
Table Name	Select from drop-down list.	The table name where the contacts for upload are placed. **Note:** Enter a **View Name** instead of a **Table Name** if you intend uploading contacts from a database view.
Profile Name	Select from drop-down list.	The profile name, configuration as per which contacts in this file are uploaded.

Click **Upload** in the **Actions** pane if you want to upload contacts as configured in the profile you selected.

If you have changes to make to the profile, make those changes by completing the complete fields mentioned in Table 4–20, Table 4–21, and Table 4–22 to configure how your contacts are uploaded.

4.2.6.3 Field Mapping Details

Click the **Field Mapping** tab to populate the fields for mapping fields in the upload file to those in LCM Console as shown in Figure 4–30 and map fields as detailed in Table 4–20.

Figure 4–30 Contact Uploads - Field Mapping

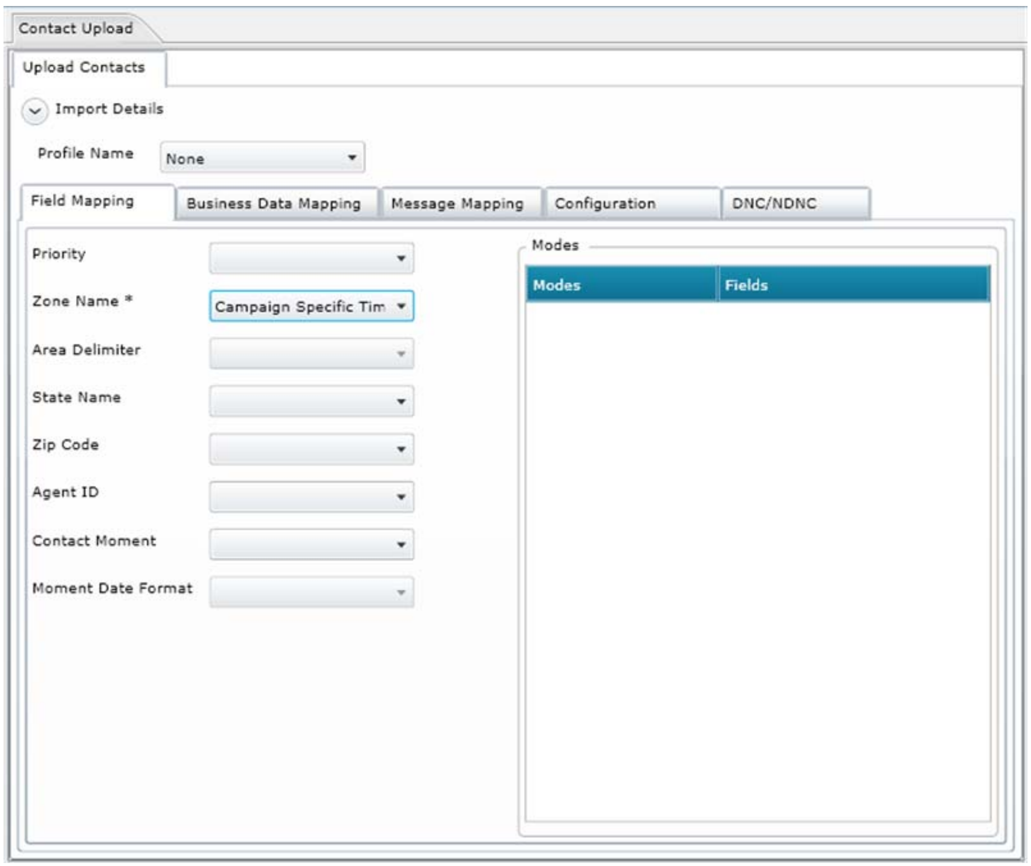


Table 4–20 Contact Uploads - Field Mapping Details

Field	Action	Description
Priority	Select from drop-down list.	The priority you want to set for this contact. The higher the priority, the earlier the contact is delivered to the dialer. Do not make a selection if you want all the contacts to be treated equally.

Field	Action	Description
Zone Name	Select from drop-down list.	The zone name applicable to the contacts. Available options are: • Campaign Specific TimeZone • Zip Code Specific TimeZone • Area Specific TimeZone
Area Delimiter	Select from drop-down list.	The delimiter used to separate components of a contact telephone number. **Note:** This will be enabled only if the Zone Name is Area Specific Time Zone.
State Name	Select from drop-down list.	The geographical state to which these contacts relate to.
Zip Code	Select from drop-down list.	The zip code applicable to the contacts.
Agent ID	Select from drop-down list.	The Agent ID for this contact.
Contact Moment	Select from drop-down list.	A specific date and time to dial the contact.
Moment Date Format	Select from drop-down list.	The date format for your contact moment.
Profile Execution Time	Select from pop-up time panel	The time at which this profile is executed to upload contacts from the database table. **Note:** This field is applicable only for uploads from database tables/views.
Modes	Select from drop-down list.	The modes that you want to map for this contact.

4.2.6.4 Business Data Mapping

Click the **Business Data Mapping** tab to display mapping fields as shown in Figure 4–31 and complete the fields detailed in Table 4–21.

Figure 4–31 Contact Uploads - Business Data Mapping

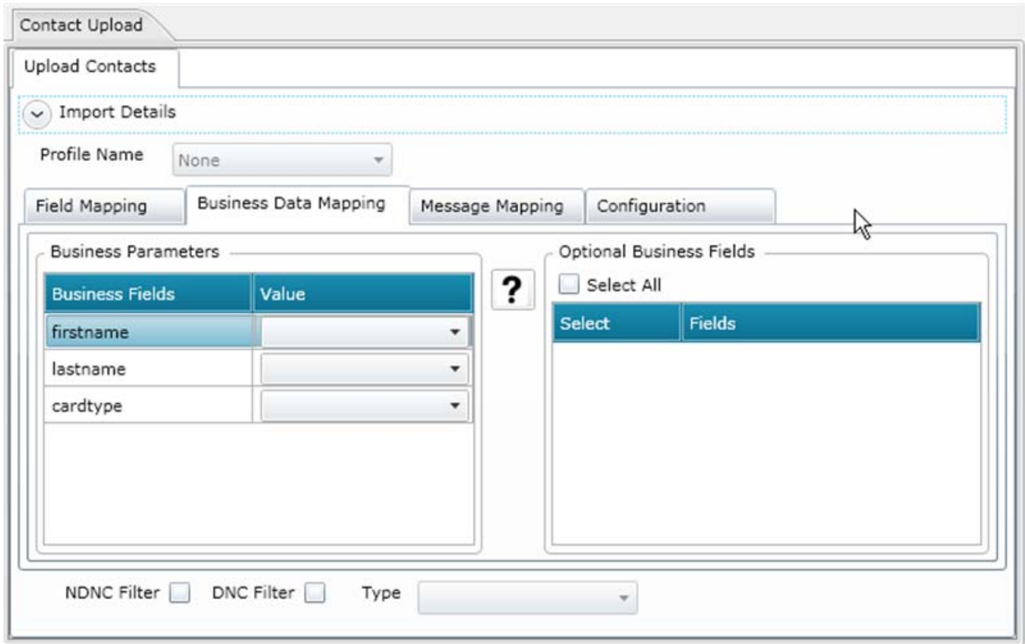
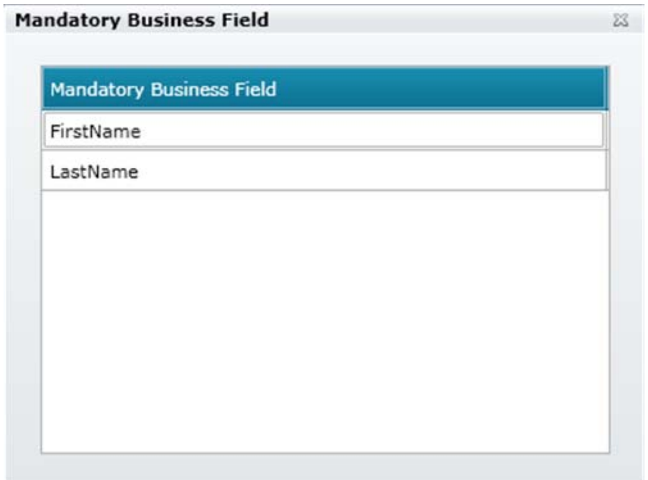


Table 4–21 Contact Uploads - Business Data Mapping

Field	Action	Description
Business Parameters	Select appropriate fields from the **Value** drop-down list and map to each Business Field.	The fields in the upload file (**Value**) that you want to map to the Business Fields.
Optional Business Fields	Select the **Select All** checkbox or select required items from drop-down list.	The additional fields that you want to map for uploaded contacts.

To know what the mandatory fields are, click the **Question Mark** icon to see those as shown in Figure 4–32.

Figure 4–32 Mandatory Business Fields



4.2.6.5 Message Mapping

Click the **Message Mapping** tab to display the mapping fields as shown in Figure 4–33 and map the fields as detailed in Table 4–22. You can use this tab to map fields for your email and SMS campaigns.

Figure 4–33 Contact Uploads - Message Mapping

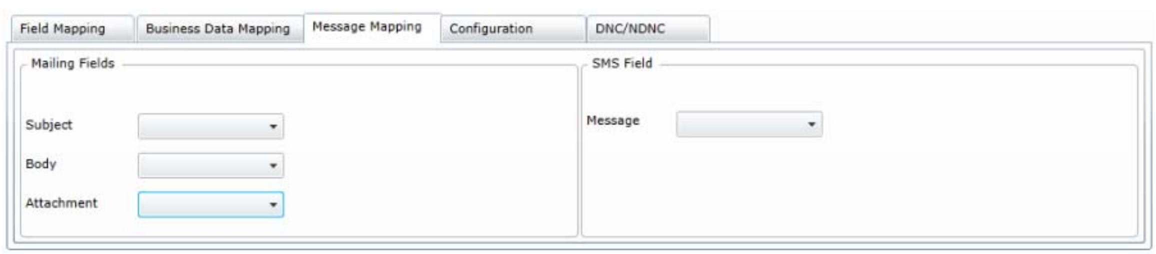


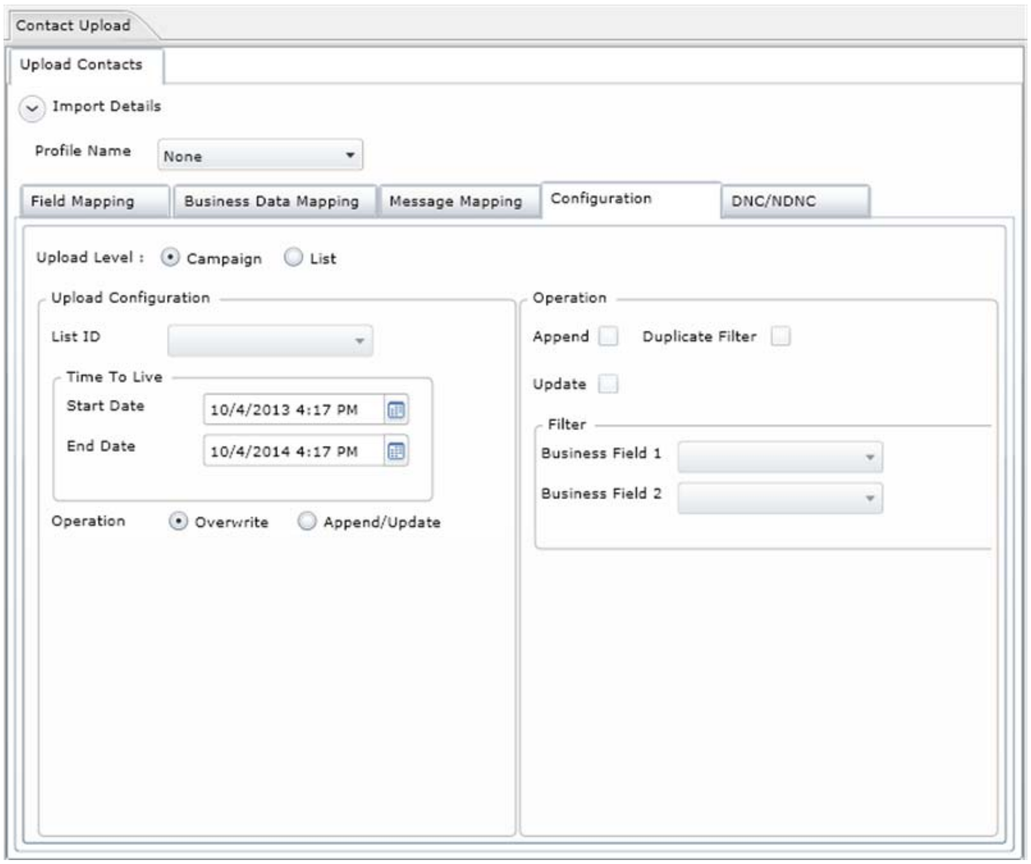
Table 4–22 Contact Uploads - Message Mapping Details

Field	Action	Description
Mailing Fields		
Subject	Select from drop-down list.	The subject line for your email.
Body	Select from drop-down list.	The content of your email message.
Attachment	Select from drop-down list.	Path to the attachment file that goes with your Email.
SMS Field		
Message	Select from drop-down list.	The message field that is mapped to send a message to the customer.

4.2.6.6 Configuration

You can configure the way your campaign handles contacts you upload. Click the **Configuration** tab to configure your upload contact file. The **Configuration** tab is shown in Figure 4–34.

Figure 4–34 Contact Uploads - Configuration



Complete the fields with details shown in Table 4–23.

Table 4–23 Contact Uploads - Configuration Details

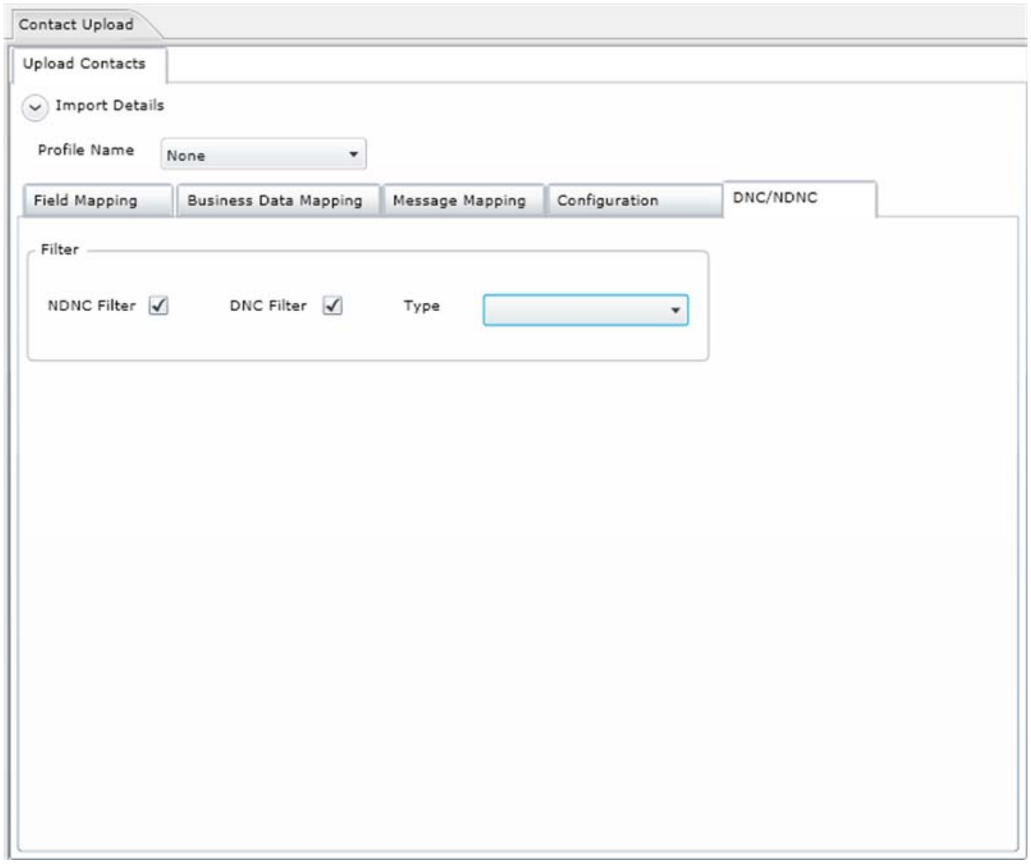
Field	Action	Description
Upload Level	Select button.	Select **Campaign** for campaign-level uploads and **List** for list-level uploads.
Upload Configuration		
List ID	Select from drop-down list.	This is enabled only if you select **List** as your Upload Level.
Time to Live Start Date End Date	Select from calendar.	The duration (start and end dates) that this list is valid for dialing.

Field	Action	Description
Operation	Select button.	Select from **Overwrite** or **Append/Update**. • **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/Update**: This enables the **Operation** section, explained below.
Operation		
Append	Select checkbox.	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.
Duplicate Filter	Select checkbox.	This is enabled only when you select the **Append** checkbox. This 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.
Update	Select checkbox.	If upload level is **Campaign**, updates the business fields for the filtered contacts.
Filter		
Business Field 1	Select from drop-down list.	The field based on which you want to filter for duplicates/update operation. All campaign business fields are listed for selection.
Business Field 2	Select from drop-down list.	The field based on which you want to filter 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.

4.2.6.7 DNC/NDNC

You can, at the time of upload, mark **DNC** and **NDNC** contacts. Click the **DNC/NDNC** tab to accomplish this task, as shown in Figure 4–35.

Figure 4–35 DNC/NDNC



Complete the fields listed in Table 4–24.

Table 4–24 DNC/NDNC Fields

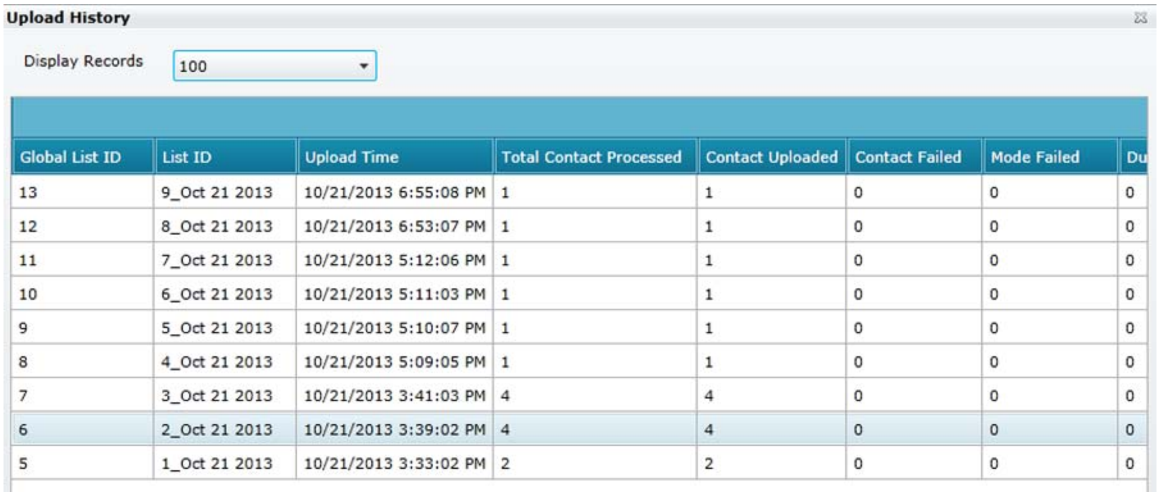
Field	Action	Description
NDNC Filter	Select checkbox	National Do Not Call filter. Selecting this checkbox ensures that contacts marked ad National Do Not Call are not uploaded.
DNC Filter	Select checkbox.	Do Not Call filter. Selecting this checkbox ensures that contacts marked as Do Not Call are not uploaded. You can select either a phone number or a business field marked as DNC.
Type	Select from drop-down list.	The field on which you apply the DNC filter. Sample fields could be a phone number, business fields, etc.

After you complete mapping all the fields in all the tabs, click **Upload** in the **Actions** pane to upload contacts to LCM Console.

Click **Re-Filter DNC** in the **Actions** pane if you want to apply the DNC Filter a second time, before uploading your contacts to LCM.

Click **Upload History** in the **Actions** pane to view the uploaded list details for this campaign. See Figure 4–36.

Figure 4–36 Upload History



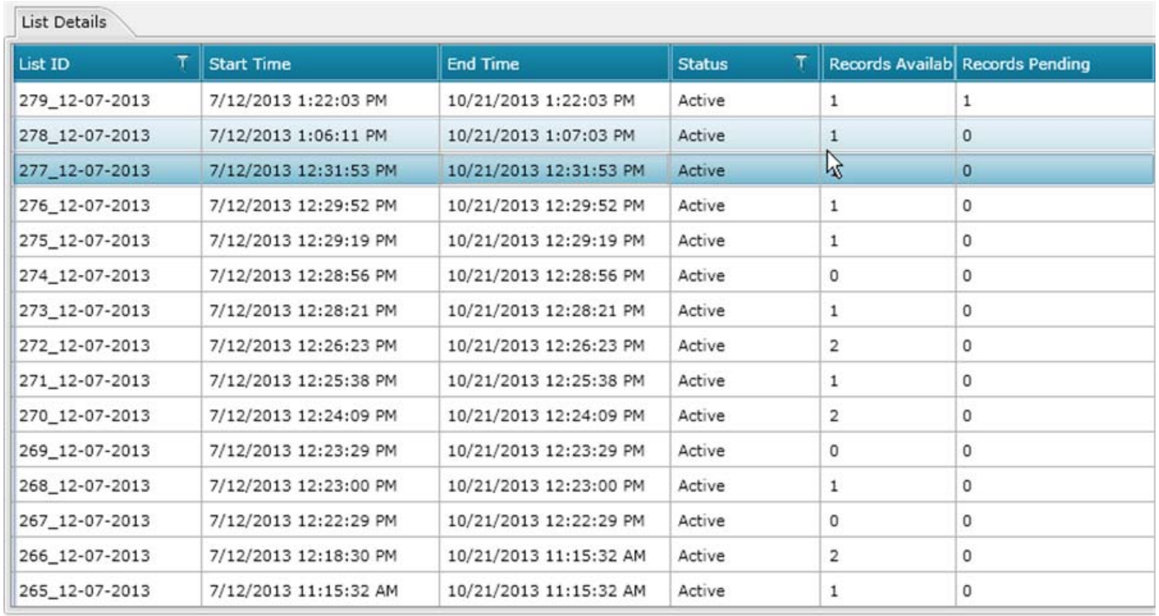
Global List ID	List ID	Upload Time	Total Contact Processed	Contact Uploaded	Contact Failed	Mode Failed	Du
13	9_Oct 21 2013	10/21/2013 6:55:08 PM	1	1	0	0	0
12	8_Oct 21 2013	10/21/2013 6:53:07 PM	1	1	0	0	0
11	7_Oct 21 2013	10/21/2013 5:12:06 PM	1	1	0	0	0
10	6_Oct 21 2013	10/21/2013 5:11:03 PM	1	1	0	0	0
9	5_Oct 21 2013	10/21/2013 5:10:07 PM	1	1	0	0	0
8	4_Oct 21 2013	10/21/2013 5:09:05 PM	1	1	0	0	0
7	3_Oct 21 2013	10/21/2013 3:41:03 PM	4	4	0	0	0
6	2_Oct 21 2013	10/21/2013 3:39:02 PM	4	4	0	0	0
5	1_Oct 21 2013	10/21/2013 3:33:02 PM	2	2	0	0	0

Click **Clear** in the **Actions** pane at any stage before you upload contacts, if you want to cancel your mappings and start mapping afresh.

4.2.7 List Information

You can view details of all uploaded files for a specific campaign. Click the **List Information** icon in the module component to open the **List Information** tab as shown in Figure 4–37

Figure 4–37 List Details



List Details

List ID	Start Time	End Time	Status	Records Availab	Records Pending
279_12-07-2013	7/12/2013 1:22:03 PM	10/21/2013 1:22:03 PM	Active	1	1
278_12-07-2013	7/12/2013 1:06:11 PM	10/21/2013 1:07:03 PM	Active	1	0
277_12-07-2013	7/12/2013 12:31:53 PM	10/21/2013 12:31:53 PM	Active		0
276_12-07-2013	7/12/2013 12:29:52 PM	10/21/2013 12:29:52 PM	Active	1	0
275_12-07-2013	7/12/2013 12:29:19 PM	10/21/2013 12:29:19 PM	Active	1	0
274_12-07-2013	7/12/2013 12:28:56 PM	10/21/2013 12:28:56 PM	Active	0	0
273_12-07-2013	7/12/2013 12:28:21 PM	10/21/2013 12:28:21 PM	Active	1	0
272_12-07-2013	7/12/2013 12:26:23 PM	10/21/2013 12:26:23 PM	Active	2	0
271_12-07-2013	7/12/2013 12:25:38 PM	10/21/2013 12:25:38 PM	Active	1	0
270_12-07-2013	7/12/2013 12:24:09 PM	10/21/2013 12:24:09 PM	Active	2	0
269_12-07-2013	7/12/2013 12:23:29 PM	10/21/2013 12:23:29 PM	Active	0	0
268_12-07-2013	7/12/2013 12:23:00 PM	10/21/2013 12:23:00 PM	Active	1	0
267_12-07-2013	7/12/2013 12:22:29 PM	10/21/2013 12:22:29 PM	Active	0	0
266_12-07-2013	7/12/2013 12:18:30 PM	10/21/2013 11:15:32 AM	Active	2	0
265_12-07-2013	7/12/2013 11:15:32 AM	10/21/2013 11:15:32 AM	Active	1	0

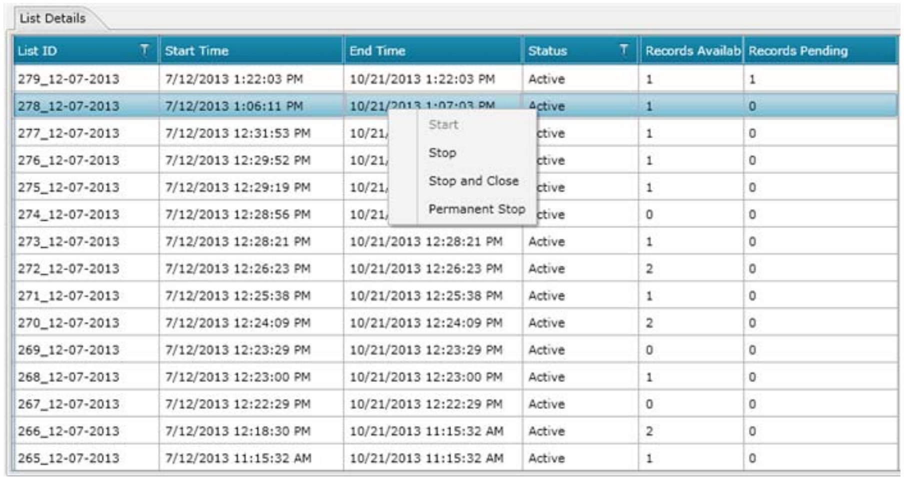
You can see the following details listed in the **List Information** tab:

- **List ID:** The list ID of the uploaded file.
- **Start Time**: The time the first record started uploading from this file.
- **End Time**: The time the last record completed uploading from this file.
- **Status**: The uploaded file status like Active, Stopped, Closed, etc.
- **Records Available**: The number of contacts uploaded.
- **Records Pending**: The number of contacts open for dialing.

You can also filter the listed data by clicking the filter icon. For more information on using filters, see Using Filters.

Right-click any cell (other than those in the header row) to see the actionable options as shown in Figure 4–38.

Figure 4–38 List Information - Actions



List ID	Start Time	End Time	Status	Records Availab	Records Pending
279_12-07-2013	7/12/2013 1:22:03 PM	10/21/2013 1:22:03 PM	Active	1	1
278_12-07-2013	7/12/2013 1:06:11 PM	10/21/2013 1:07:03 PM	Active	1	0
277_12-07-2013	7/12/2013 12:31:53 PM	10/21,	ctive	1	0
276_12-07-2013	7/12/2013 12:29:52 PM	10/21,	ctive	1	0
275_12-07-2013	7/12/2013 12:29:19 PM	10/21,	ctive	1	0
274_12-07-2013	7/12/2013 12:28:56 PM	10/21,	ctive	0	0
273_12-07-2013	7/12/2013 12:28:21 PM	10/21/2013 12:28:21 PM	Active	1	0
272_12-07-2013	7/12/2013 12:26:23 PM	10/21/2013 12:26:23 PM	Active	2	0
271_12-07-2013	7/12/2013 12:25:38 PM	10/21/2013 12:25:38 PM	Active	1	0
270_12-07-2013	7/12/2013 12:24:09 PM	10/21/2013 12:24:09 PM	Active	2	0
269_12-07-2013	7/12/2013 12:23:29 PM	10/21/2013 12:23:29 PM	Active	0	0
268_12-07-2013	7/12/2013 12:23:00 PM	10/21/2013 12:23:00 PM	Active	1	0
267_12-07-2013	7/12/2013 12:22:29 PM	10/21/2013 12:22:29 PM	Active	0	0
266_12-07-2013	7/12/2013 12:18:30 PM	10/21/2013 11:15:32 AM	Active	2	0
265_12-07-2013	7/12/2013 11:15:32 AM	10/21/2013 11:15:32 AM	Active	1	0

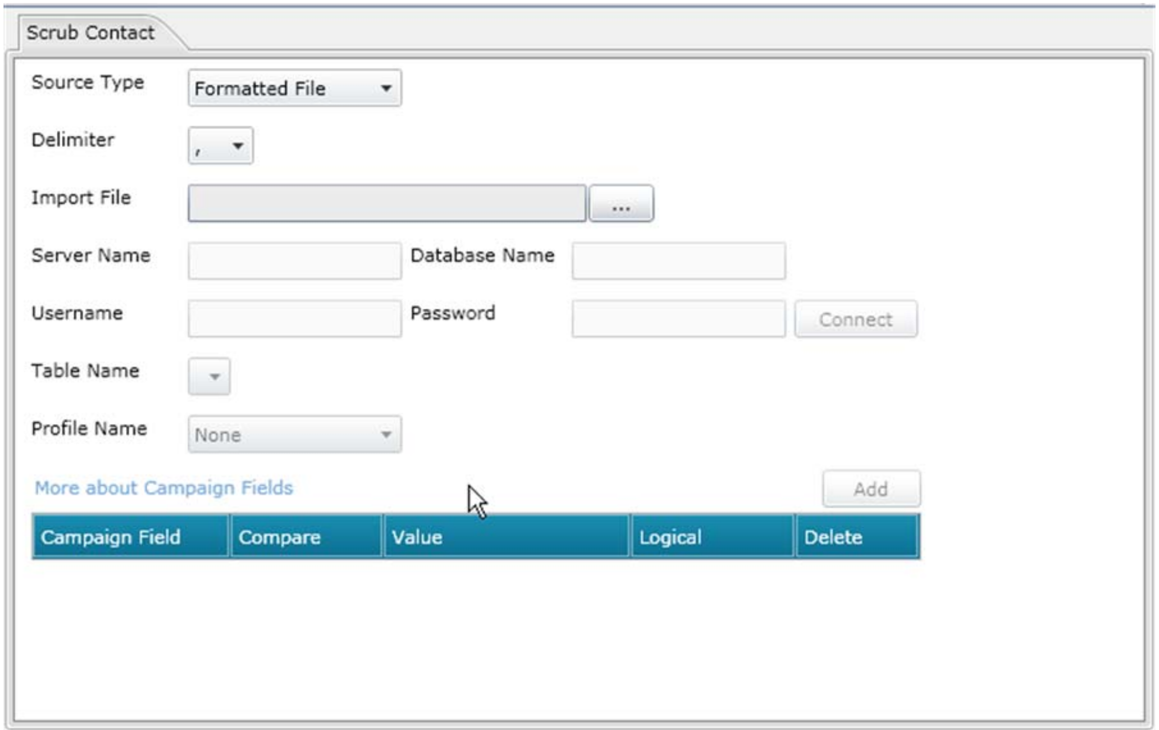
- **Start**: Selecting this makes the list active.
- **Stop**: Selecting this makes the list inactive.
- **Stop and Close**: Selecting this makes the list inactive and closes the contacts. You can reopen the contacts using Manage Contacts.
- **Permanent Stop**: Selecting this makes the list inactive and closes the list permanently. This closure is final and you cannot later reopen the contacts.

4.2.8 Scrub Contacts

Scrub Contacts 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 which you can configure.

Click the **Scrub Contacts** icon in the module component to open the **Scrub Contact** tab as shown in Figure 4–39.

Figure 4–39 Scrub Contacts



Complete the fields detailed in Table 4–25.

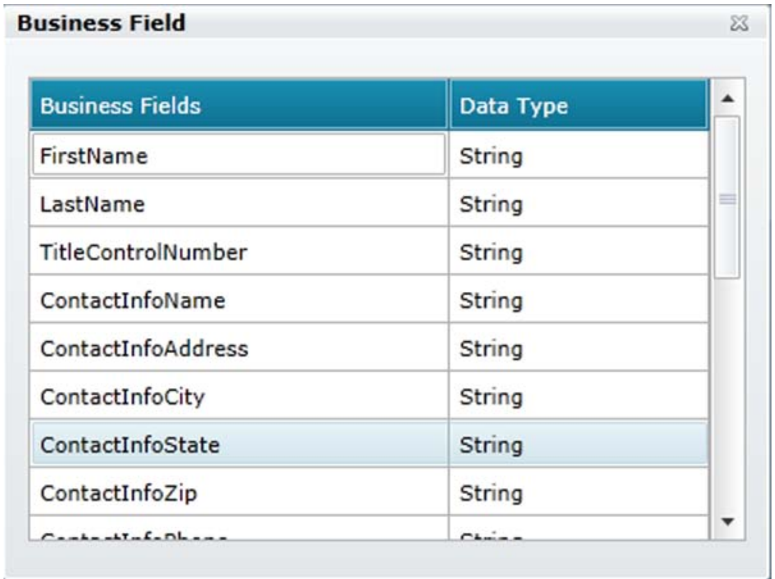
Table 4–25 Scrub Contacts - Details

Field	Action	Description
Source Type	Select **Formatted File**, **Database Tables,** or **Database Views** from drop-down list.	The source type from which you want to upload contacts.
Delimiter	Select from drop-down list.	The delimiter used in your file to separate various fields in a record, if it is not a comma-separated file. **Note:** Field active if **Uploaded From** is **Formatted File**.
Import File	Enter the file path or browse to select.	The path where you have placed the file containing contacts. **Note:** Field active if **Uploaded From** is **Formatted File**.

Field	Action	Description
Server Name	Enter a value.	The server name or the IP address where the database containing the contacts for upload is placed. **Note:** Field active if **Uploaded From** is **Database Tables or Database Views**.
Database Name	Enter a value.	The database name where the table containing contacts for upload is available. **Note:** Field active if **Uploaded From** is **Database Tables or Database Views**.
Username	Enter a value.	The database username where the table containing contacts for upload is available. **Note:** Field active if **Uploaded From** is **Database Tables or Database Views**.
Password	Enter a value.	The password for accessing the database where the table containing contacts for upload is available. **Note:** Field active if **Uploaded From** is **Database Tables or Database Views**.
Table Name	Select from drop-down list.	The table name where the contacts for upload are placed. **Note:** Field active if **Uploaded From** is **Database Tables or Database Views**. **Note:** Enter a **View Name** instead of a **Table Name** if you intend uploading contacts from a database view.
Profile Name	Select from drop-down list.	The profile name for which you want to save the configuration.

Clicking the **More about Campaign Fields** pops up the mandatory business fields, as shown in Figure 4–40.

Figure 4–40 Mandatory Business Fields



After you complete the fields, you have to specify the conditions for scrubbing contacts. Click the **Add** icon to add rows to the condition builder and configure your conditions as shown in Table 4–26.

Table 4–26 Scrub Contacts - Condition Builder

Field	Action	Description
Campaign Field	Select from drop-down list.	The field using which you want to build a condition.
Compare	Select from drop-down list.	The comparison parameter for your condition. For example, > (greater than), < (lesser than), = (equals), etc. could be conditions.
Value	Select from drop-down list.	The value on which you want to build your condition.
Logical	Select from drop-down list.	The and/or logic for the condition.

You can delete any condition by clicking the **Delete** icon alongside each row of your condition.

If you are scrubbing contacts using a **Database Table** or a **Database View**, click **Connect** to connect to the database where your contacts are located.

Click **Scrub** in the **Actions** pane to scrub contacts from your upload file.

To clear your selection for all fields before commencing the scrub action and to make a fresh selection, click **Clear** in the **Actions** pane.

4.2.8.1 Auto Scrub

Autoscrub is a feature that deletes the contacts automatically without user intervention. It automatically processes the scrub files from the specified path and scrubs the contacts as per the conditions created in the Build Condition criteria even when the campaign is running.

Specify the **file/database table** or **view**, **path**, and **credentials**. Map the fields using the condition builder to set the conditions based on which you want to scrub the contacts.

Click **Auto Scrub** in the **Actions** pane to commence automatic scrubbing of contacts.

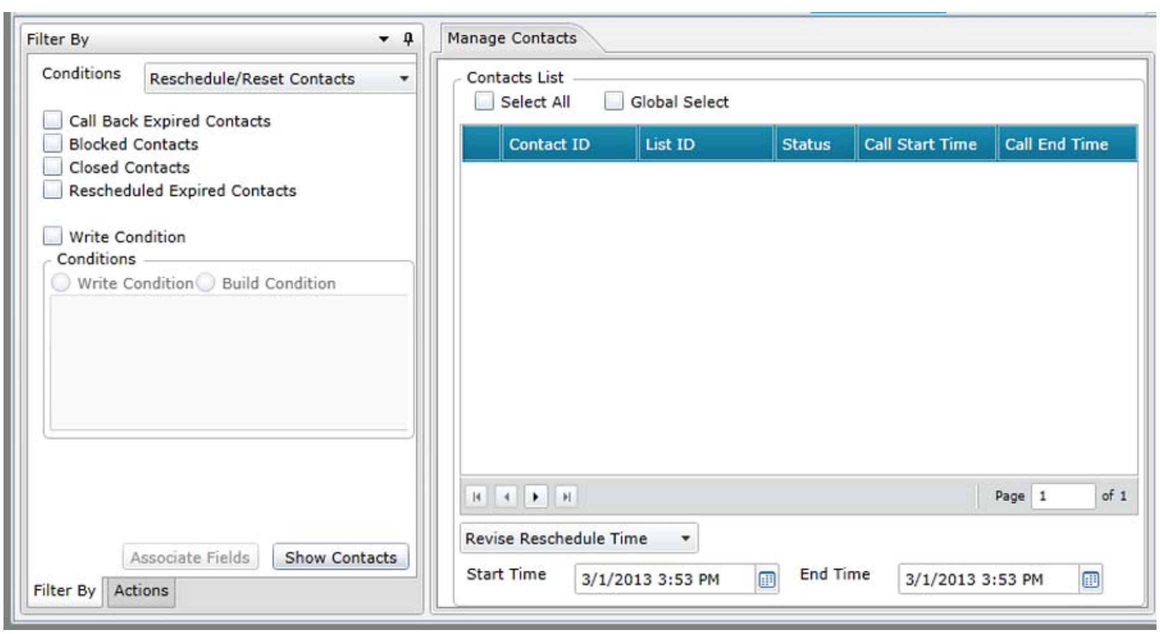
To clear your selection for all fields before commencing the scrub action and to make a fresh selection, click **Clear** in the **Actions** pane.

4.2.9 Manage Contacts

You may want to reopen closed contacts, reschedule/reset contacts to a later date and time, or block contacts from being delivered to the dialer. You can achieve all this and much more by using the Manage Contacts functionality in LCM Console. The Manage Contacts functionality also gives you the flexibility on what you want to do with which contact.

Click the **Manage Contacts** module component to open the **Manage Contacts** tab as shown in Figure 4–41.

Figure 4–41 Manage Contacts



The **Manage Contacts** tab displays the results of the various filters and conditions that you set in the **Actions** pane. Hence, you may have more work to do in the **Actions** pane than in the **Manage Contacts** tab for this option. You can manage the following types of contacts using this functionality:

- Callback expired contacts
- Blocked contacts
- Closed contacts
- Rescheduled expired contacts

You can manage contacts by one of the following actions:

- Reschedule/Reset Contacts
- Block Contacts
- Close Contacts
- Move Contacts

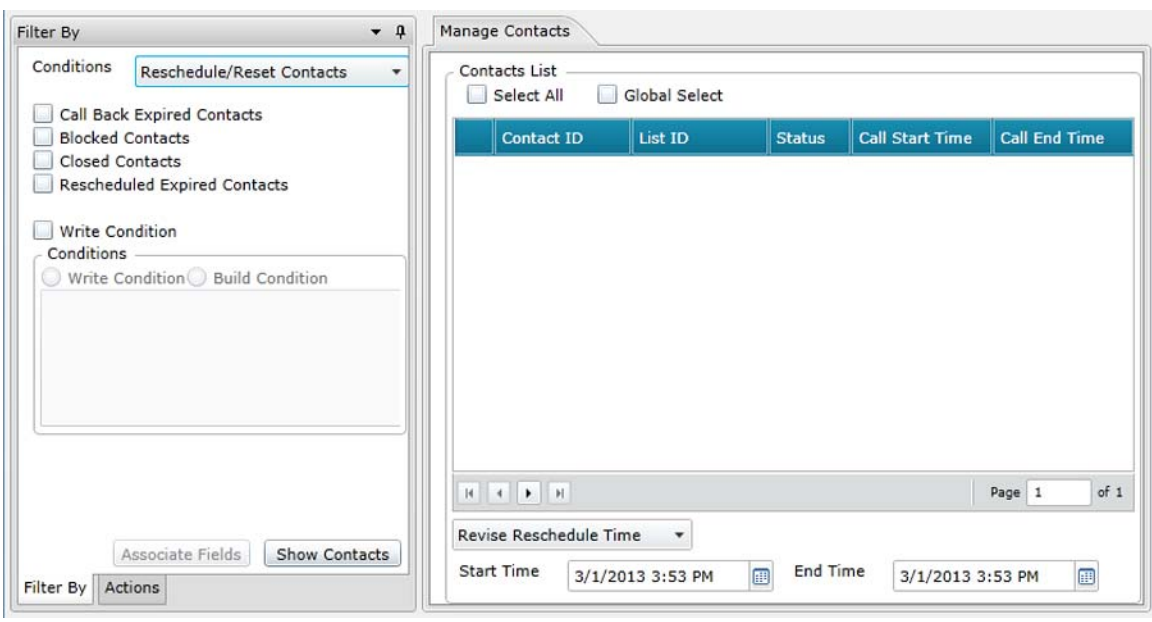
You can select the above actions from the **Conditions** drop-down list in the **Actions** pane.

4.2.9.1 Reschedule/Reset Contacts

You can reschedule or reset contacts by following the steps listed below.

Select the **Reschedule/Reset Contacts** option from the **Conditions** drop-down list in the **Actions** pane. The **Actions** pane and the **Manage Contacts** tab is shown in Figure 4–42.

Figure 4–42 Reschedule/Reset Contacts



You can select any or all of the following types of contacts by selecting the appropriate checkboxes:

- **Call Back Expired Contacts**

- Blocked Contacts
- Closed Contacts
- Rescheduled Expired Contacts

Click **Show Contacts** at the bottom of the **Actions** pane. All the contacts classified according to your checkbox selection are displayed in the work area.

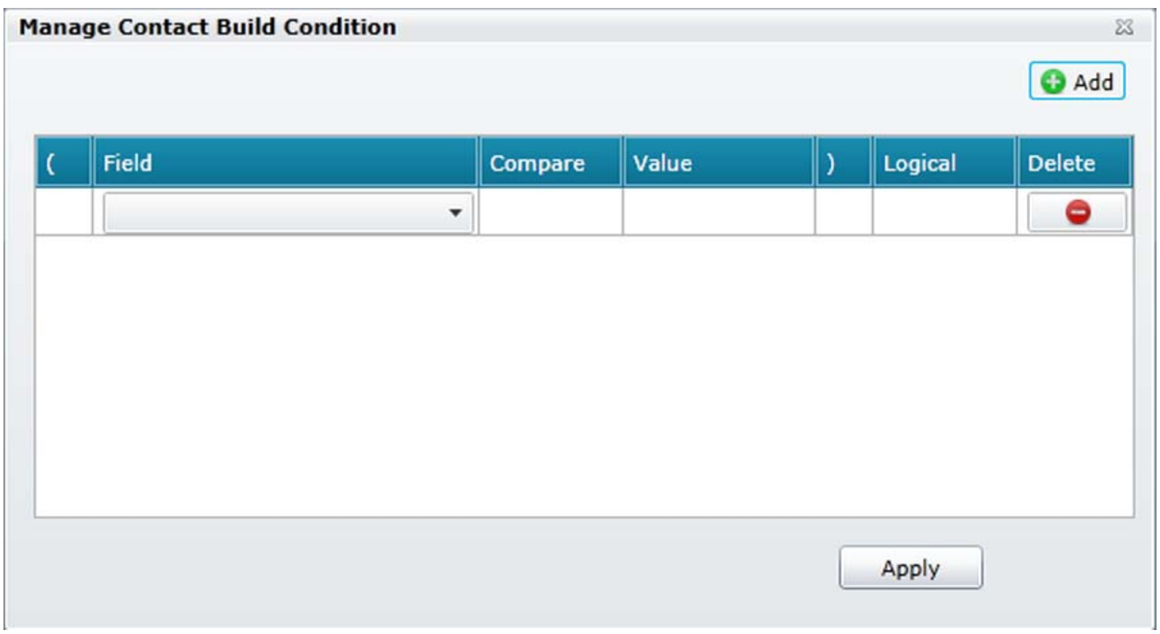
If you want to further filter your contact selection, specify the criteria based on which you want the contacts displayed for reschedule/reset. Select the **Write Condition** checkbox.

The **Write Condition** text box and the buttons for **Write Condition** or **Build Condition** are enabled.

Select the **Write Condition** button to write a condition. Type the condition in the text box and click the **Show Contacts** button at the bottom of the **Actions** pane.You can see the contacts satisfying your criteria listed in the **Manage Contacts** tab.

Select the **Build Condition** button to use the condition builder tool. The condition builder **Manage Contact Build Condition** pops up as shown in Figure 4–43.

Figure 4–43 Manage Contact - Build Condition



Click the **Add** button and complete the fields as listed in Table 4–27.

Table 4–27 Reschedule/Reset Contacts - Build Condition Details

Field	Action	Description
(	Enter **(**.	An open parenthesis sign to begin the condition.

Field	Action	Description
Field	Select from drop-down list.	The field for which you want to build a condition.
Compare	Select from drop-down list.	The comparison parameter for your condition. For example, > (greater than), < (lesser than), = (equals), etc. could be conditions.
Value	Enter a value.	The value on which you want to build your condition.
)	Enter **)**.	A close parenthesis sign to complete the condition.
Logical	Select from drop-down list.	The and/or logic for the condition.
Delete	Click **Delete** button.	Deletes the selected condition.

Click **Apply** to apply the conditions.

Click **Show Contacts** at the bottom of the **Actions** pane. All the contacts satisfying the criteria are displayed in the work area.

You can select contacts to reschedule/reset by one of the following methods:

- The contacts are listed at 100 per page. To select all contacts for reschedule/reset, select the **Select All** checkbox.
- To select the entire contact list spanning several pages, select the **Global Select** checkbox.
- To select specific contacts select the checkbox corresponding to the appropriate entry.

Select an appropriate action from the drop-down list at the bottom of the **Manage Contacts** tab. The options available in the drop-down list are:

- **Revise Reschedule Time**· You have to specify a revised **Start Time** and an **End Time** by selecting the date and time from the popup panels below the drop-down list.
- **Reset as Fresh Contact**· The contacts will reset as fresh contacts and will be delivered to the dialer based on your settings/configurations in LCM Console.
- **Reopen Contacts**· The contacts are reopened and will be delivered to the dialer based on your settings/configurations in LCM Console.

Now navigate to the **Action** tab in the **Actions** pane and click **Apply** to complete reschedule/reset selected contacts.

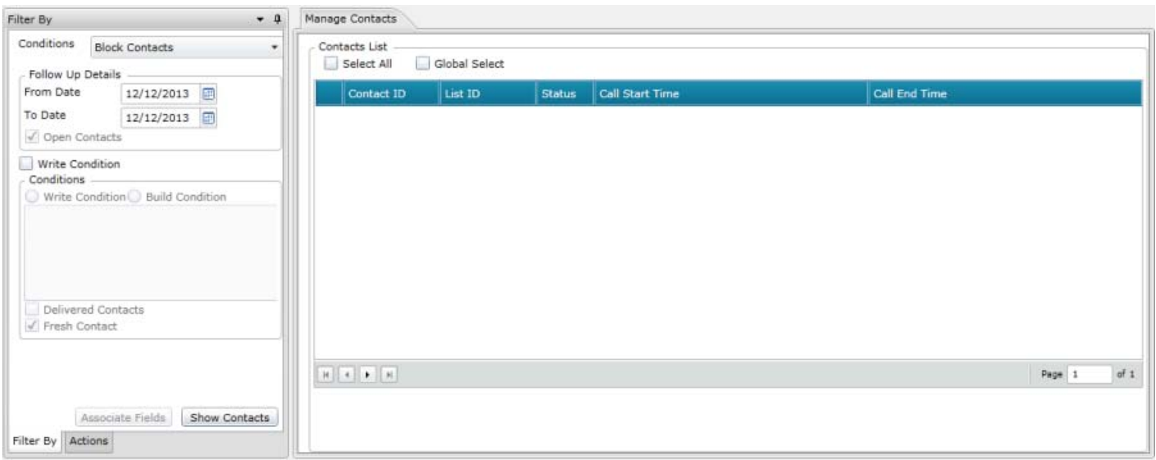
Click **Cancel** in the **Actions** pane to clear data and settings without committing to update. This starts your **Manage Contacts** operation afresh.

4.2.9.2 Block Contacts

You can block contacts by following the steps listed below.

Select the **Block Contacts** option from the **Conditions** drop-down list in the **Actions** pane. The **Actions** pane and the **Manage Contacts** tab is shown in Figure 4–44.

Figure 4–44 Block Contacts



You can select contacts to block by one of the following methods:

- **Date Range**· Block contacts falling in a follow-up date range. Select the **From Date** and the **To Date** from the popup panels. Click **Show Contacts** at the bottom of the **Actions** pane. All the contacts satisfying the criteria are displayed in the work area.
- **Condition Builder**· Write or build a condition to show contacts to block.

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.

If you want to filter your contact selection, specify the criteria based on which you want the contacts displayed for block. Select the **Write Condition** checkbox.

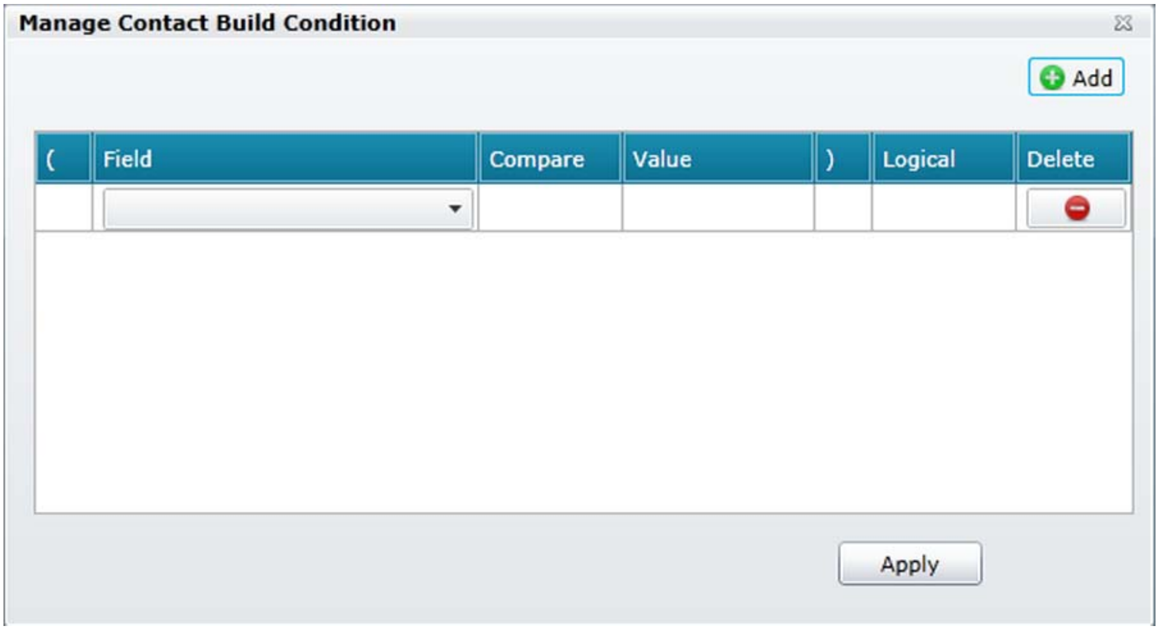
Note: Select the **Fresh Contacts** checkbox to directly fetch Fresh Contacts without having to write conditions to fetch contacts.

The **Write Condition** text box is enabled, as are the buttons for **Write Condition** or **Build Condition**.

Select the **Write Condition** button to write a condition. Type the condition in the text box and click the **Show Contacts** button at the bottom of the **Actions** pane.You can see the contacts satisfying your criteria listed in the **Manage Contacts** tab.

Select the **Build Condition** button to use the condition builder tool. The condition builder **Manage Contact Build Condition** pops up as shown in Figure 4–45.

Figure 4–45 Block Contacts - Build Condition



Click the **Add** button and complete the fields as listed in Table 4–28.

Table 4–28 Block Contacts - Build Condition

Field	Action	Description
(	Enter **(**.	An open parenthesis sign to begin the condition.
Campaign Field	Select from drop-down list.	The field for which you want to build a condition.
Compare	Select from drop-down list.	The comparison parameter for your condition. For example, > (greater than), < (lesser than), = (equals), etc. could be conditions.
Value	Enter a value.	The value on which you want to build your condition.
)	Enter **)**.	A close parenthesis sign to complete the condition.
Logical	Select from drop-down list.	The and/or logic for the condition.
Delete	Click **Delete** button.	Deletes the selected condition.

Click **Apply** to apply the conditions.

Click **Show Contacts** at the bottom of the **Actions** pane. **All** the contacts satisfying the criteria are displayed in the work area.

You can select contacts to block by one of the following methods:

- The contacts are listed at 100 per page. To select all contacts for block, select the **Select All** checkbox.
- To select the entire contact list spanning several pages, select the **Global Select** checkbox.
- To select specific contacts select the checkbox corresponding to the appropriate entry.

Navigate to the **Actions** tab in the **Actions** pane and click **Apply** to block selected contacts.

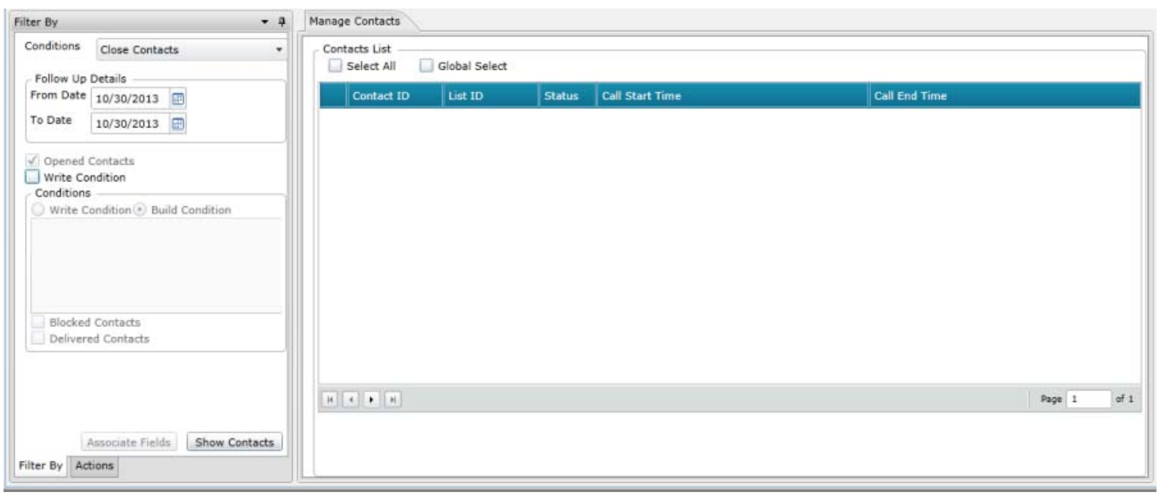
Click **Cancel** in the **Actions** pane to clear data and settings without committing to update. This starts your **Manage Contacts** operation afresh.

4.2.9.3 Close Contacts

You can close contacts by following the steps listed below.

Select the **Close Contacts** option from the **Conditions** drop-down list in the **Actions** pane. The **Actions** pane and the **Manage Contacts** tab is shown in Figure 4–46.

Figure 4–46 Close Contacts



You can select contacts to close by one of the following methods:

- **Date Range**· Close contacts falling in a follow-up date range. Select the From Date and the To Date from the popup panels. Click **Show Contacts** at the bottom of the **Actions** pane. All the contacts satisfying the criteria are displayed in the work area.
- **Condition Builder**· Write or build a condition to show contacts to close.

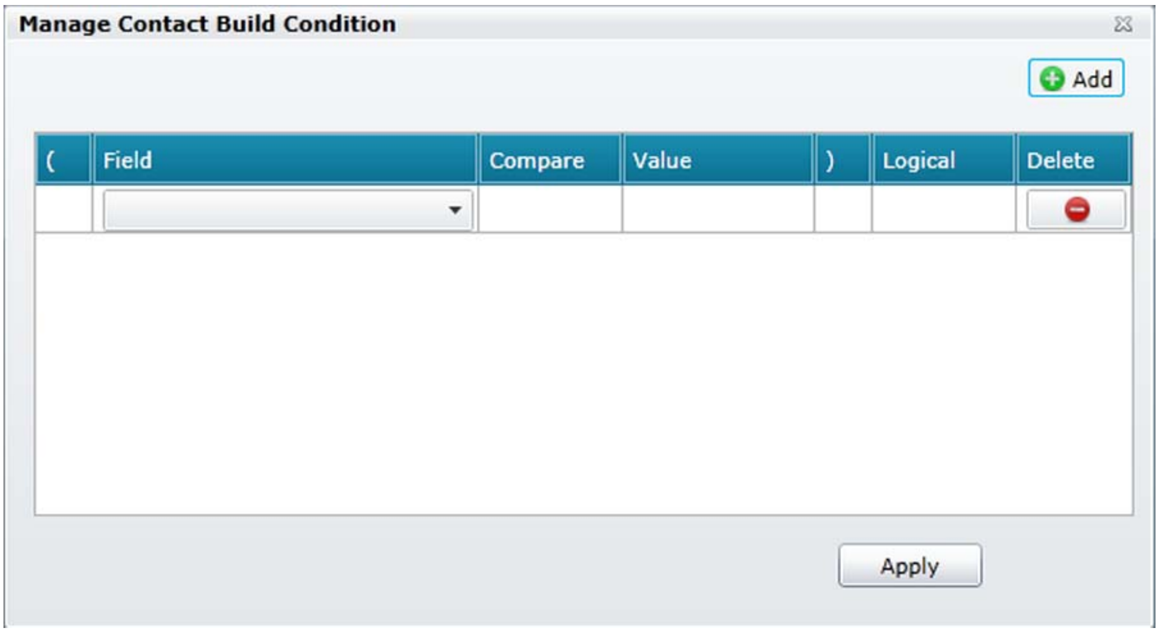
If you want to filter your contact selection, specify the criteria based on which you want the contacts displayed for close, select the **Write Condition** checkbox.

The **Write Condition** text box is enabled, as are the buttons for **Write Condition** or **Build Condition**.

Select the **Write Condition** button to write a condition. Type the condition in the text box and click the **Show Contacts** button at the bottom of the **Actions** pane.You can see the contacts satisfying your criteria listed in the **Manage Contacts** tab.

Select the **Build Condition** button to use the condition builder tool. The condition builder **Manage Contact Build Condition** pops up as shown in Figure 4–47.

Figure 4–47 Close Contacts - Build Condition



Click the **Add** button and complete the fields as listed in Table 4–29.

Table 4–29 Close Contacts - Build Condition Details

Field	Action	Description
(	Enter **(**.	An open parenthesis sign to begin the condition.
Campaign Field	Select from drop-down list.	The field for which you want to build a condition.
Compare	Select from drop-down list.	The comparison parameter for your condition. For example, > (greater than), < (lesser than), = (equals), etc. could be conditions.
Value	Enter a value.	The value on which you want to build your condition.
)	Enter **)**.	A close parenthesis sign to complete the condition.

Field	Action	Description
Logical	Select from drop-down list.	The and/or logic for the condition.
Delete	Click **Delete** button.	Deletes the selected condition.

Click **Apply** to apply the conditions.

Click **Show Contacts** at the bottom of the **Actions** pane. All the contacts satisfying the criteria are displayed in the work area.

You can select contacts to close by one of the following methods:

- The contacts are listed at 100 per page. To select all contacts for close, select the **Select All** checkbox.
- To select the entire contact list spanning several pages, select the **Global Select** checkbox.
- To select specific contacts select the checkbox corresponding to the appropriate entry.

Navigate to the **Actions** tab in the **Actions** pane and click **Apply** to close selected contacts.

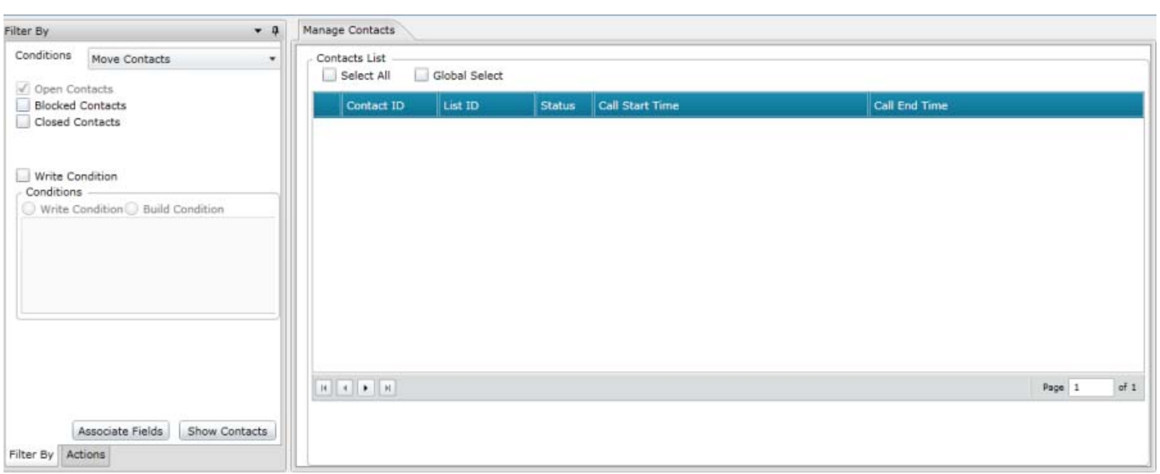
Click **Cancel** in the **Actions** pane to clear data and settings without committing to update. This starts your **Manage Contacts** operation afresh.

4.2.9.4 Move Contacts

You can move contacts from one campaign to another in LCM Console. The contacts thus moved will be delivered to the redesignated campaigns in the Unified CCE dialer.

Select **Move Contacts** from the **Conditions** drop-down list in the **Actions** pane. The **Manage Contacts** tab is shown in Figure 4–48.

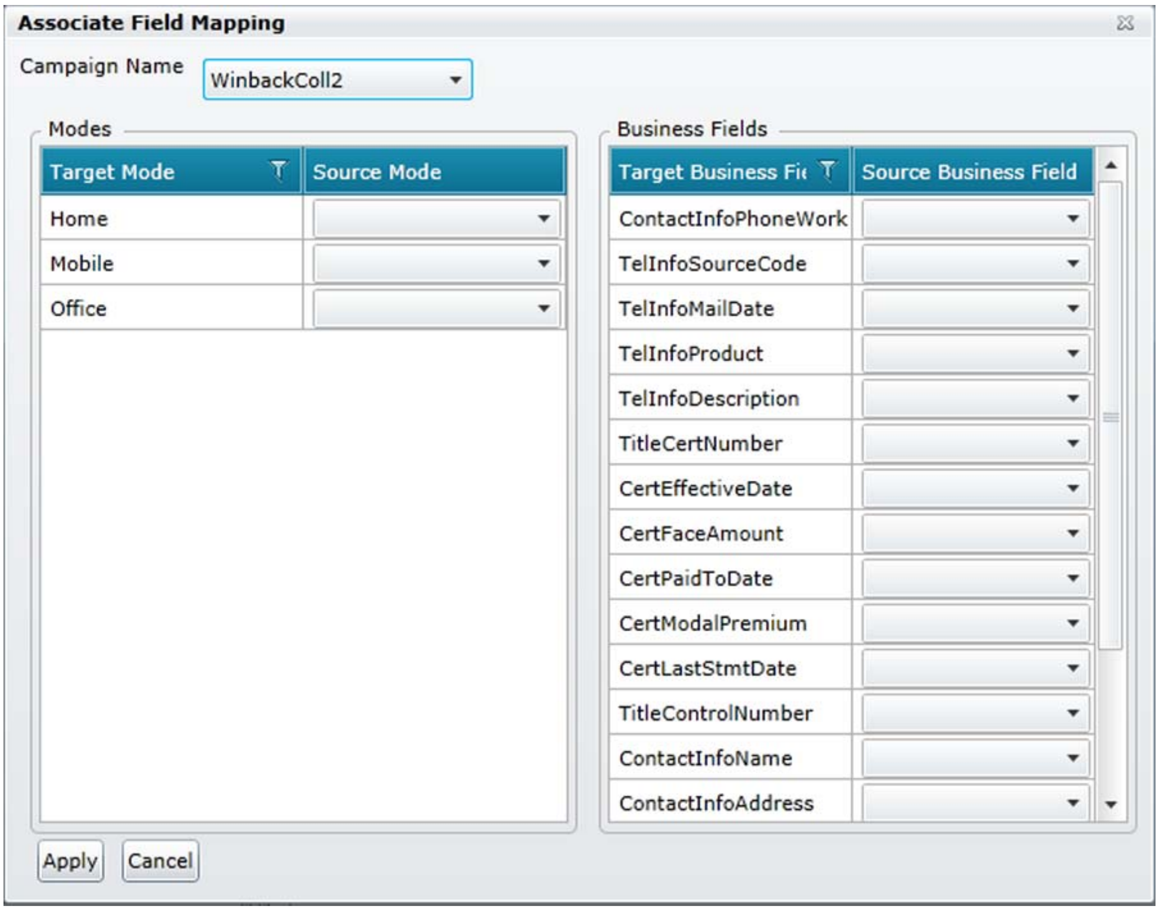
Figure 4–48 Move Contacts



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.

You have to associate fields from the destination campaign to those in the source campaign. Click the **Associate Fields** button at the bottom of the **Actions** pane to see the **Associate Field Mapping** popup as shown in Figure 4–49.

Figure 4–49 Move Contacts - Associate Field Mapping



From the **Campaign Name** drop-down list, select the destination campaign you want to move the contacts to.

In the **Modes** section, you can see the modes associated to the source campaign in the **Source Mode** column. Associate this source mode to an appropriate target mode from the **Target Mode** drop-down list.

In the **Business Fields** section, all the business fields associated to the source campaign are displayed. Associate each of these business fields to target business fields from the **Target Business Fields** drop-down list.

Note: You must associate all mandatory business fields in the target campaign to some business fields in the source campaign, without which you cannot move contacts from one campaign to another.

After associating the fields for the source and target campaigns, select the type of contacts you want to move. You can choose either of or both the following checkboxes:

- Blocked Contacts
- Closed Contacts

After selecting the checkboxes, you have two options as below:

- Show Contacts· Click the Show Contacts button at the bottom of the Actions pane to display the contacts in the Manage Contacts tab.
- Condition Builder· Write or build a condition to show contacts to move.

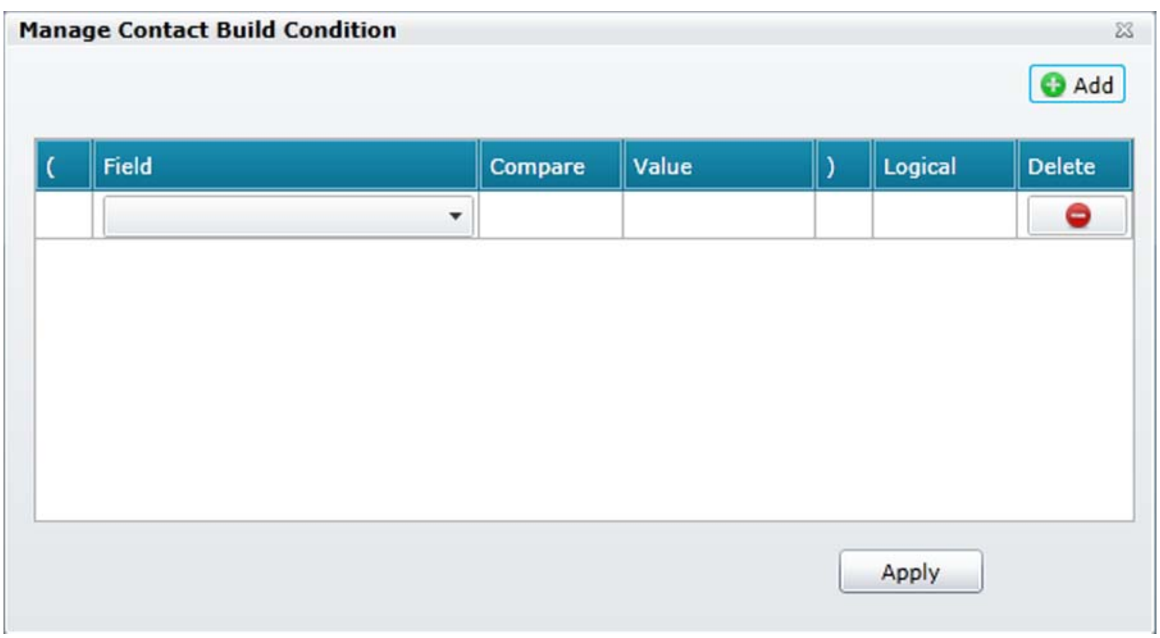
If you want to filter your contact selection, specify the criteria based on which you want the contacts displayed for close, select the **Write Condition** checkbox.

The **Write Condition** text box is enabled, as are the buttons for **Write Condition** or **Build Condition**.

Select the **Write Condition** button to write a condition. Type the condition in the text box and click the **Show Contacts** button at the bottom of the **Actions** pane.You can see the contacts satisfying your criteria listed in the **Manage Contacts** tab.

Select the **Build Condition** button to use the condition builder tool. The condition builder **Manage Contact Build Condition** pops up as shown in Figure 4–50.

Figure 4–50 Move Contacts - Build Condition



Click the **Add** button and complete the fields as listed in Table 4–30.

Table 4–30 Move Contacts - Build Condition Details

Field	Action	Description
(	Enter **(**.	An open parenthesis sign to begin the condition.
Campaign Field	Select from drop-down list.	The field for which you want to build a condition.
Compare	Select from drop-down list.	The comparison parameter for your condition. For example, > (greater than), < (lesser than), = (equals), etc. could be conditions.
Value	Enter a value.	The value on which you want to build your condition.
)	Enter **)**.	A close parenthesis sign to complete the condition.
Logical	Select from drop-down list.	The and/or logic for the condition.
Delete	Click **Delete** button.	Deletes the selected condition.

Click **Apply** to apply the conditions.

Click **Show Contacts** at the bottom of the **Actions** pane. All the contacts satisfying the criteria are displayed in the work area.

You can select contacts to move by one of the following methods:

- The contacts are listed at 100 per page. To select all contacts for move, select the **Select All** checkbox.
- To select the entire contact list spanning several pages, select the **Global Select** checkbox.
- To select specific contacts select the checkbox corresponding to the appropriate entry.

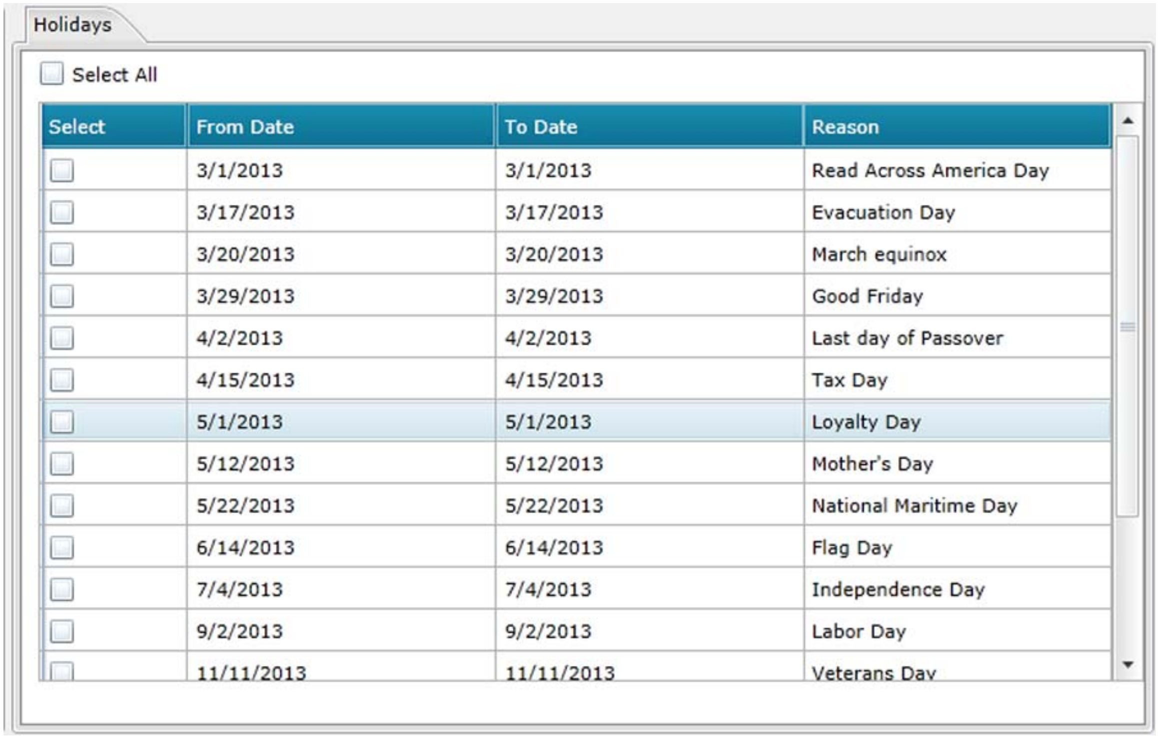
Navigate to the **Actions** tab in the **Actions** pane and click **Apply** to move selected contacts.

Click **Cancel** in the **Actions** pane to clear data and settings without committing to update. This starts your **Manage Contacts** operation afresh.

4.2.10 Holidays

You can specify the days your campaign will not run by using the **Holidays** option. Click the **Holidays** icon in the module component to populate the list of holidays in the **Holidays** tab as shown in Figure 4–51.

Figure 4–51 Campaigns - Holidays


Holidays

Select All

Select	From Date	To Date	Reason
☐	3/1/2013	3/1/2013	Read Across America Day
☐	3/17/2013	3/17/2013	Evacuation Day
☐	3/20/2013	3/20/2013	March equinox
☐	3/29/2013	3/29/2013	Good Friday
☐	4/2/2013	4/2/2013	Last day of Passover
☐	4/15/2013	4/15/2013	Tax Day
☐	5/1/2013	5/1/2013	Loyalty Day
☐	5/12/2013	5/12/2013	Mother's Day
☐	5/22/2013	5/22/2013	National Maritime Day
☐	6/14/2013	6/14/2013	Flag Day
☐	7/4/2013	7/4/2013	Independence Day
☐	9/2/2013	9/2/2013	Labor Day
☐	11/11/2013	11/11/2013	Veterans Day

Select the checkboxes against the holidays displayed to set them as campaign holidays.

Select the **Select All** checkbox in the column header to select all the holidays displayed.

Click **Save** in the **Actions** pane to close your campaign on the selected holidays.

Note: If the holiday you assign to a campaign are 7 days or longer, the contacts rescheduled for the last 7 days of the holiday are expired from dialing. For example, if you have assigned holidays from 07/15/2012 to 07/25/2012, the contacts rescheduled from 07/16/2012 to 07/18/2012 are expired from dialing. You have to reschedule these expired contacts. See Reschedule/Reset Contacts on how to reschedule expired contacts.

4.2.11 Schedule

4.2.11.1 Contact Selection Strategy Schedule

Contact Selection Strategy helps you plan the time and day for a contact selection strategy group to be applied for that particular campaign.

Click the Schedule module component to open the **CSS Schedule** tab. The **CSS Schedule** tab now displays a grid as shown in Figure 4–52.

Figure 4–52 Contact Selection Strategy Schedule

The drop-down lists in the grid show the CSS configured for this campaign. From the drop-down lists for each day of the week and each hour of the day, select an appropriate CSS to deliver contacts to the dialer.

Click **Save** in the **Actions** pane to save your **Contact Selection Strategy Schedule**.

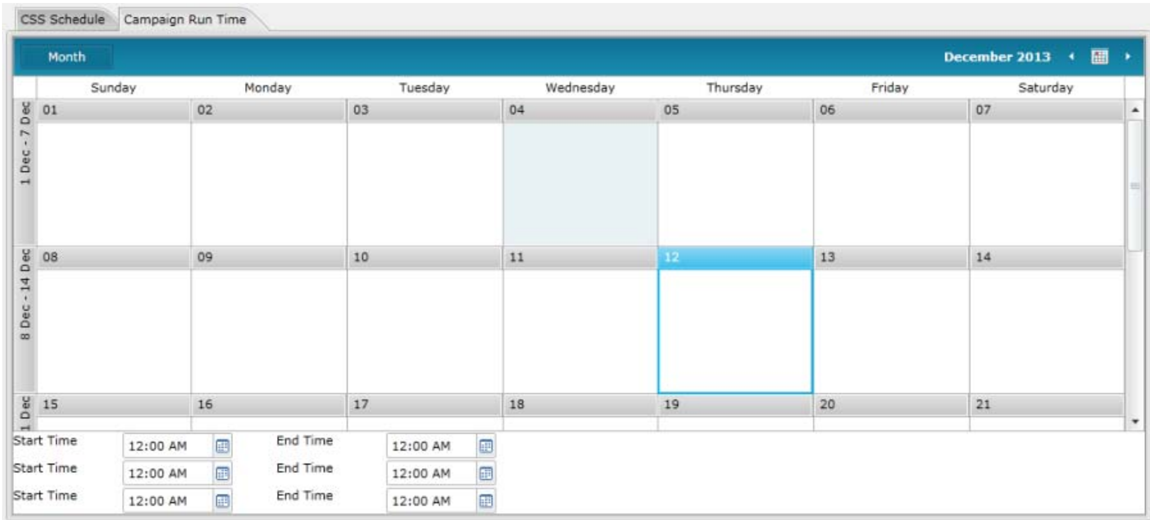
Note: The times you choose for the **Campaign RunTime** and the **Contact Selection Strategy Schedule** should match. If one is in variance with the other, the configuration will be accepted but contacts may not be delivered by LCM Console to the Unified CCE dialer.

4.2.11.2 Campaign Run Time

You can configure, on LCM Console, the run time for your campaign. Once configured, your campaign will automatically run during the scheduled days and times.

Click the **Schedule** icon in module component to open the **Campaign Run Time** as shown in Figure 4–53.

Figure 4–53 Campaign RunTime



The **Campaign Run Time** tab now displays the calendar for the current month, with the current date highlighted. You can also choose a different month from the calendar pop up panel located on the top right of the **Campaign Run Time** tab.

Click a date for which you want to configure campaign run time. For selecting multiple dates, click the first date, hold down the Ctrl key and click the last date for which you want to configure campaign run time. The selected dates are displayed highlighted.

From the time pop up panel select a first **Start Time** and **End Time**. You can configure up to three campaign run times for each day.

Click **Save** in the Actions pane. Your campaign will now run at the times configured.

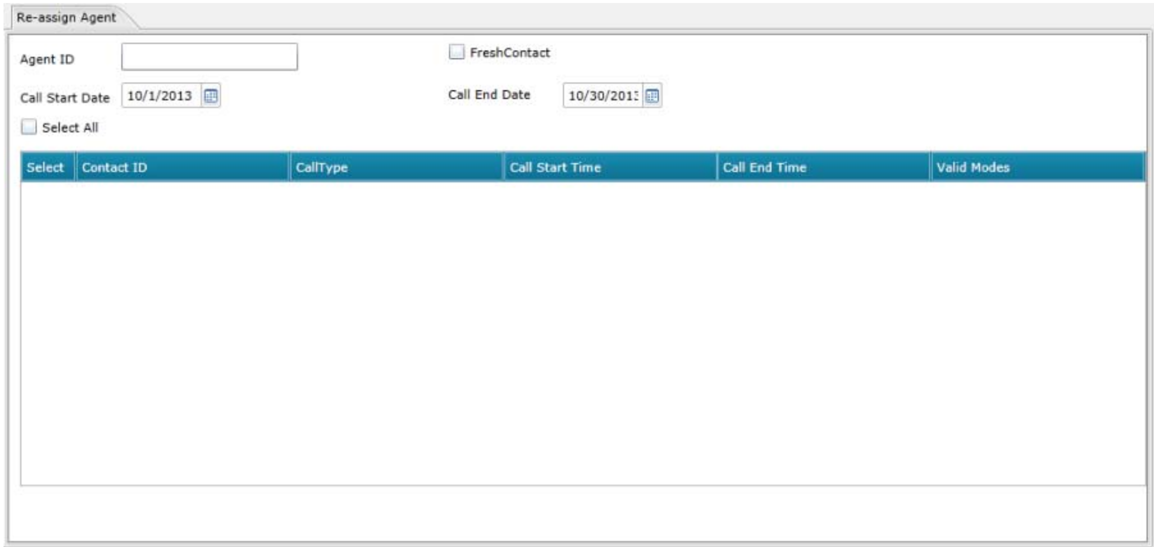
To delete a configured run time, click a date for which you want to delete the configured campaign run time. For selecting multiple dates, click the first date, hold down the Ctrl key and click the last date for which you want to delete the configured campaign run time. The selected dates are displayed highlighted. Click **Delete** in the **Actions** pane to delete the configured run times.

4.2.12 Re-assign Agent

There is always a possibility that an agent cannot handle a contact when delivered, for many reasons. You can configure LCM Console to re-assign agents to a campaign.

Click **Re-assign Agent** in the module component to open the **Re-assign Agent** tab as shown in Figure 4–54.

Figure 4–54 Re-assign Agent



Complete the fields as shown in Table 4–31.

Table 4–31 Re-assign Agents - Details

Field	Action	Description
Agent ID	Enter a value.	The agent ID from who you want to relieve and re-assign the contacts.
Fresh Contact	Select checkbox.	To retrieve all uploaded contacts from fresh uploads to reassign to a new agent as defined in the **New Agent ID** field.
Call Start Date	Select from pop up panel.	The call start date.
Call End Date	Select from pop up panel.	The call end date.

Click **Show Contacts** in the **Actions** pane to see the contacts in the **Re-assign Agent** tab.

Select the checkboxes against the contacts for which you want to re-assign agent. Select the **Select All** checkbox if you want to re-assign agent for the entire contact list.

Enter the agent ID of the agent you want to re-assign these contacts to in the **New Agent ID** at the bottom of the **Re-assign Agent** tab.

Click **Save** in the **Actions** pane to save and re-assign agents.

4.2.13 Server Script

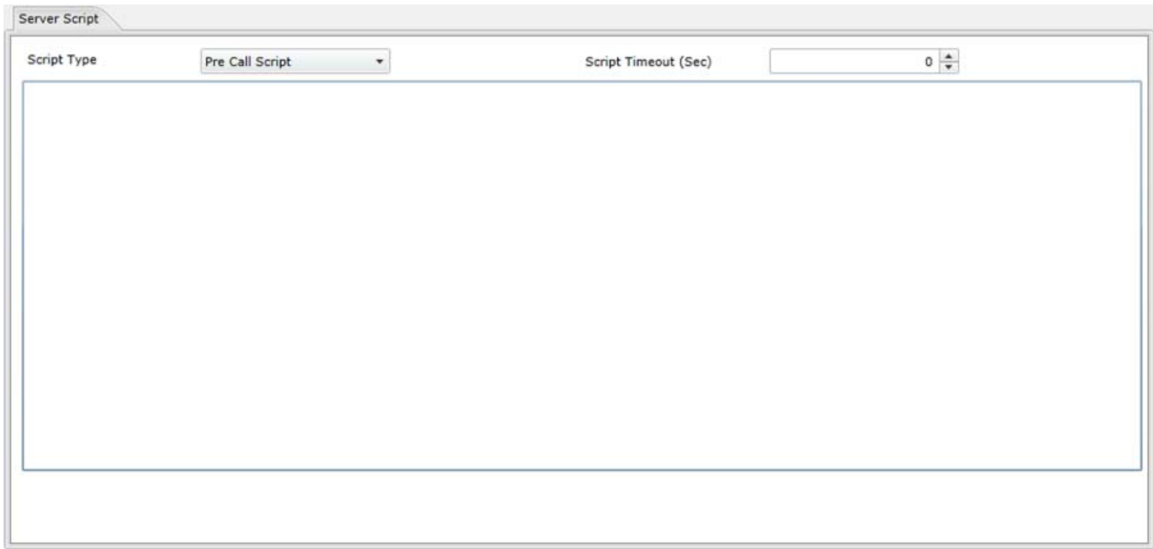
You can write scripts and execute them on LCM to perform the following tasks:

- Pre-call scripts can validate the contacts against some business logic.

- Scripts can create dynamic Email messages for campaigns.
- Scripts can create dynamic SMS messages for campaigns.

Click **Server Script** in the module component to open the **Server Script** tab as shown in Figure 4–55.

Figure 4–55 Server Script



Select a **Script Type** from the **Script Type** drop-down list. Select the **Script Timeout** from the **Script Timeout** drop-down list. Write the script that you want to execute in the box in the **Server Script** tab.

Click **Save** in the **Actions** pane to save the script.

Click **Load Script** in the **Actions** pane to open a file dialog box. Select the file and click **Open** to execute the script.

Click **Delete** in the **Actions** pane to delete the script.

Script Types

You can use various types of scripts like pre-call scripts, SMS scripts, Email scripts, etc. to perform various activities. See Table 4–32 for a list of script types and descriptions.

Table 4–32 Script Types and Description

Option	Description
Pre Call Script	A pre-call script ascertains from an external database whether a customer should be called or ignored, before calling a customer. For example: If a customer is to be reminded regarding the due date for credit card bill payment, the script first ascertains whether the payment is made or not. If payment is made, the contact will not be delivered to the Unified CCE dialer; else will be delivered. **Note:** You have to manually use this method to launch a campaign the first time after you create it.
Sms Script	The script is executed before an SMS is sent to a contact.
EMail Script	The script is executed before an Email is sent to a contact.

The script object exposes certain properties and methods related to the contact dialed. This helps to perform the business logic that decides whether to dial a contact or not. The script object also exposes a method for writing log files that may be used for troubleshooting. See Table 4–33, Table 4–34, and Table 4–35 for various script properties.

Table 4–33 Contact-related Script Properties

Function	Purpose
Script.CampaignName	Returns campaign name.
Script.CampaignPaceID	Returns the campaign pacing mode number.
Script.ContactID	Returns the contact identifier.
Script.ListID	Returns the list id for a contact.
Script.BussFld	Retrieves the business data associated with the campaign. **Note:** Possible values are **Script.BussFld1** through **Script.BussFld25**, depending on the number of business fields configured.
Script.ContactMode	Returns the mode used to reach a contact.
Script.CallType	Returns the call type. **Note:** Possible values **0** - Fresh Contact; **1** - Callback contact
Script.ZoneName	Returns the time zone of the contact.
Script.BusinessOutcome	Sets the business outcome for a call.
Script.RetValue	Sets the outcome of the execution of the script. **Note:** Possible values **True** - if script execution successful and proceed with calling the contact; **False** - if script execution unsuccessful and prevents calling a contact.

Table 4–34 SMS-related Script Properties

Function	Purpose
Script.SMSToNumber	Returns the number to which to send an SMS.
Script.SMSText	To dynamically set the SMS text to be sent.
Script.RetValue	Sets the outcome of the execution of the script. **Note:** Possible values **True** - if script execution successful and proceed with calling the contact; **False** - script execution unsuccessful and prevents calling a contact.

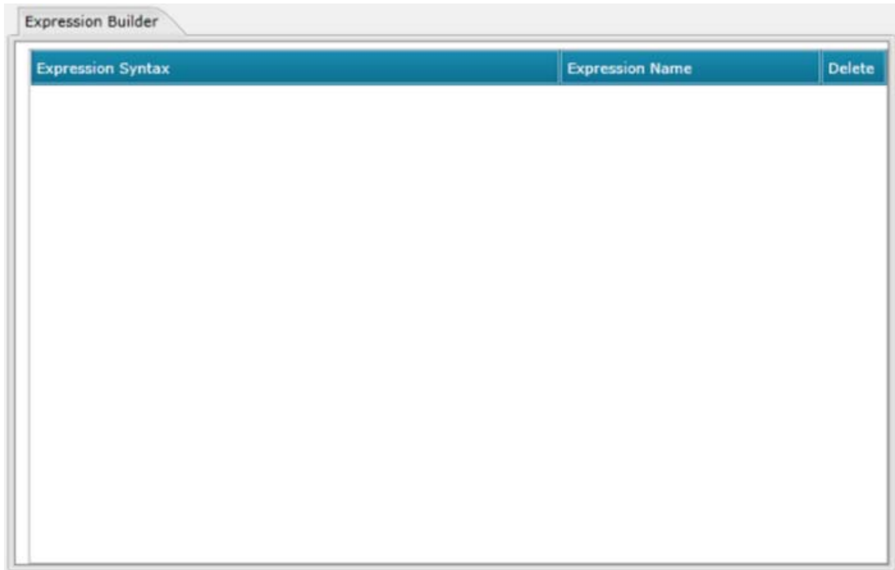
Table 4–35 Email-related Script Properties

Option	Description
Script.FromEmail	Sets the Email ID from which to send an Email.
Script.EmailSubject	Sets the subject line for an Email.
Script.EmailBody	Sets the content (body) for an Email.
Script.EmailAttachment	Sets the path to attachments to an Email.
Script.RetValue	Sets the outcome of the execution of the script. **Note:** Possible values **True** - if script execution successful and proceed with calling the contact; **False** - script execution unsuccessful and prevents calling a contact.

4.2.14 Expression Builder

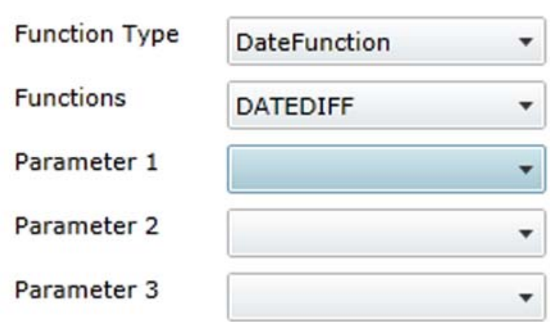
You can use the Expression Builder to define conditions that can be used as a part of Contact Selection Strategy. Click the **Expression Builder** icon in the module component to open the **Expression Builder** tab as shown in Figure 4–56.

Figure 4–56 Expression Builder



Click **Create** in the **Actions** pane on the left to populate the conditions that you need to select, as shown in Figure 4–57.

Figure 4–57 Expression Builder - Create



Complete the details shown in Table 4–36.

Table 4–36 Expression Builder - Details

Field	Action	Description
Function Type	Non-editable.	Date function.
Functions	Select from drop-down list.	The function on which you want to create an expression.

Field	Action	Description
Parameter 1	Select from drop-down list.	The time difference (in units like year, month, week, etc.) between Parameter 2 and Parameter 3.
Parameter 2	Select from drop-down list.	The start date for this expression.
Parameter 3	Select from drop-down list.	The end date for this expression.

Click **Save** in the **Actions** pane to save the configuration.

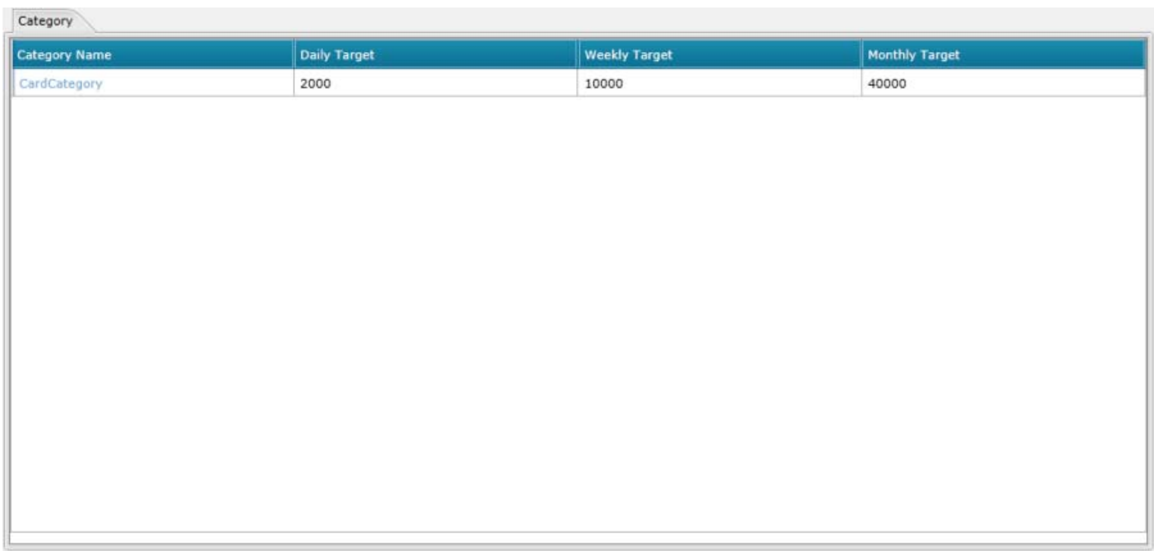
4.2.15 Category

Category is a collection of both business and telephony outcomes.

You can also set daily, weekly, and monthly targets using this option. You can also monitor campaign performance in real time using the real time reports.

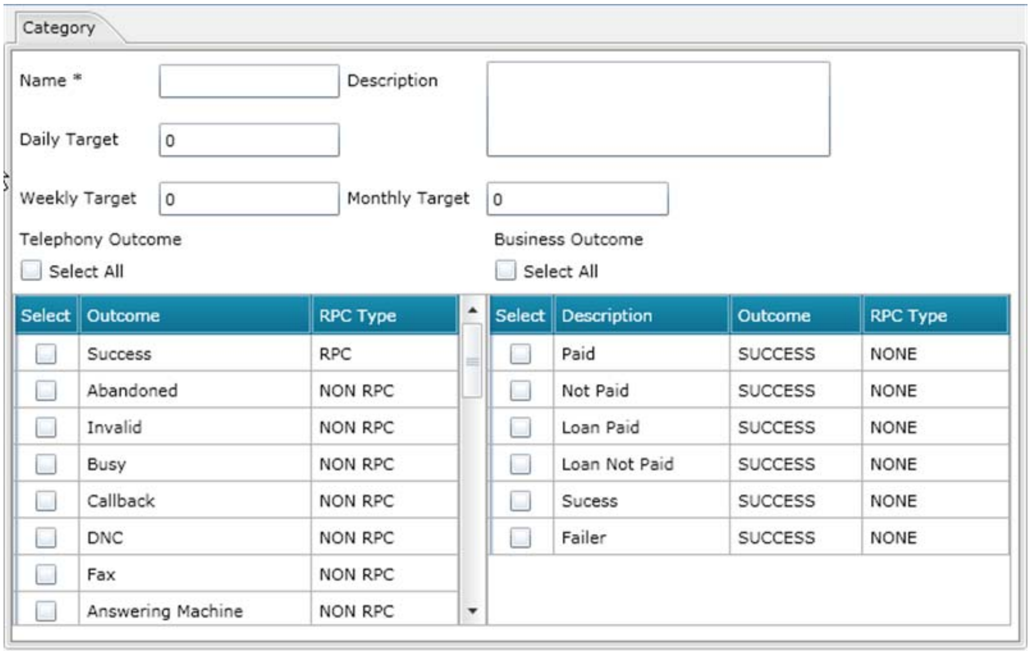
Click the **Category** icon on the module component to open the **Category** tab as shown in Figure 4–58.

Figure 4–58 Category



Click **Create** in the **Actions** pane to create a new category as shown in Figure 4–59.

Figure 4–59 Category - Details



Complete the fields listed in Table 4–37.

Table 4–37 Category -Details

Field	Action	Description
Name	Enter details.	A category name.
Description	Enter details.	A brief description for the category.
Daily Target	Enter details.	The value you want to set as the daily target.
Weekly Target	Enter details.	The value you want to set as the weekly target.
Monthly Target	Enter details.	The value you want to set as the monthly target.
Telephony Outcome	Select checkbox.	Select the outcomes to group for this category. **Note:** Select the **Select All** checkbox to select all outcomes.
Business Outcome	Select checkbox.	Select the outcomes to group for this category. **Note:** Select the **Select All** checkbox to select all outcomes.

Click **Save** in the **Actions** pane to save the configuration. Click **Clear** in the **Actions** pane to clear any data without saving.

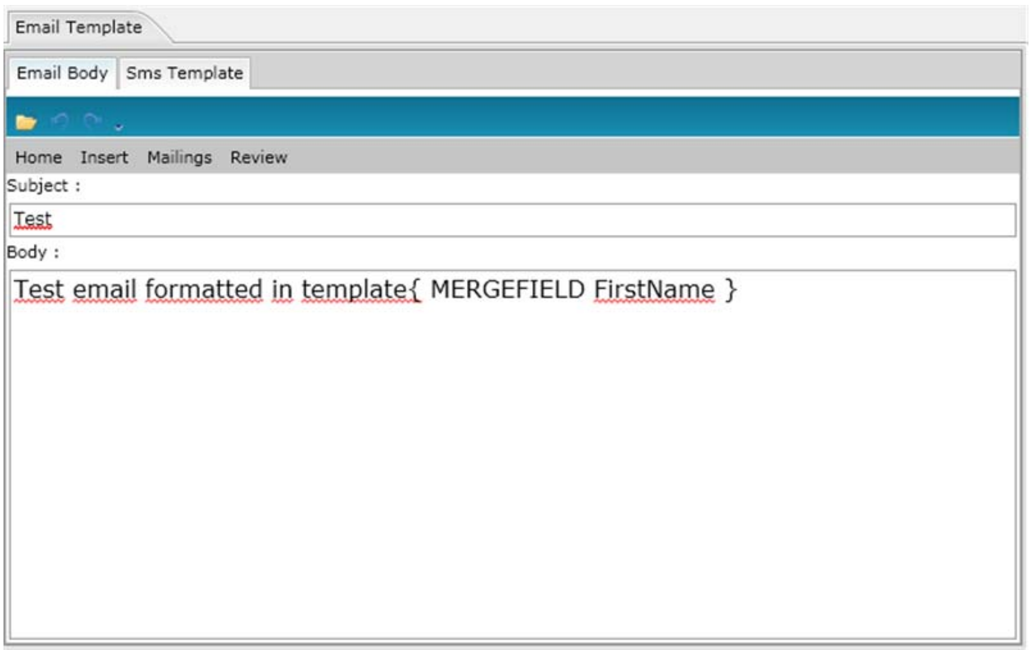
4.2.16 EMail/SMS Templates

You can use this option to create templates to send Emails and text messages relating to your campaign.

Email Templates

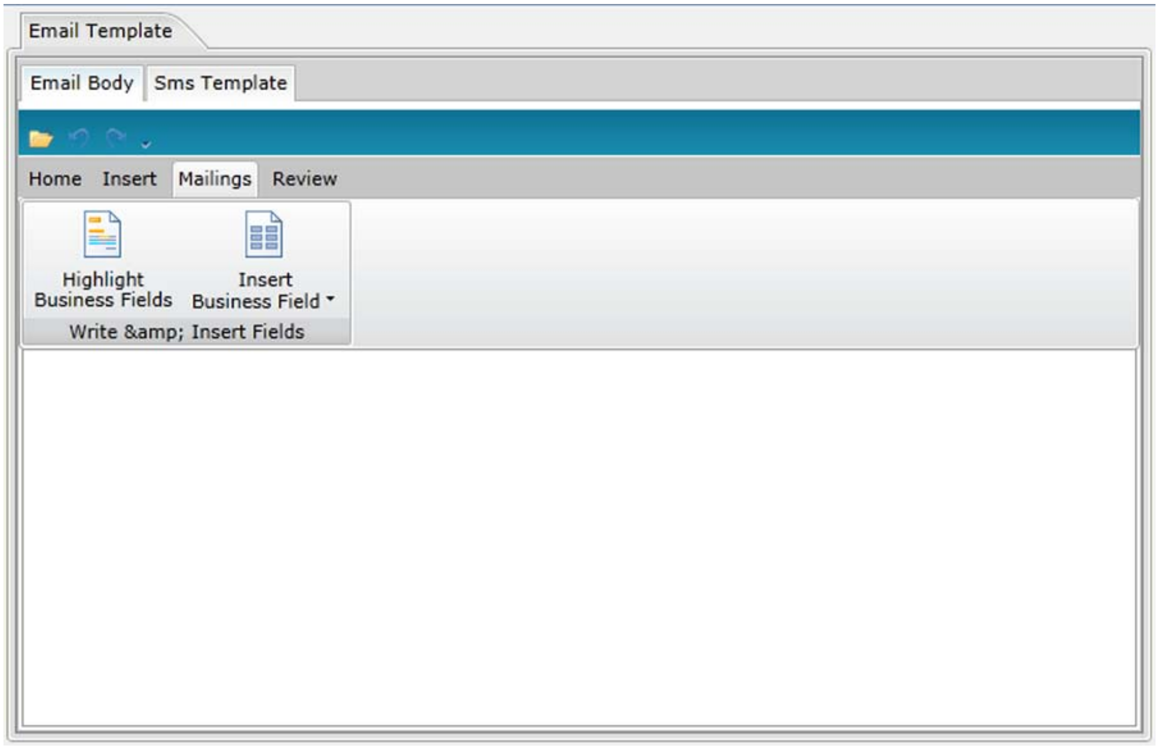
Click **Email/SMS Templates** in the module component to open the **Email Template** tab as shown in Figure 4–60.

Figure 4–60 Email Template



Enter a **Subject** and the mail content in the **Body** field. If you want to add Business Fields to your mail body, click **Mailings** in the Email Body tab to open **Highlight Business Fields** and **Insert Business Field** as shown in Figure 4–61.

Figure 4–61 Email Template - Business Field



Click **Insert Business Field** to see the configured business fields. Select the business that you want to form part of your Email.

Click **Review** to review and/or spell check before sending the Email.

SMS Templates

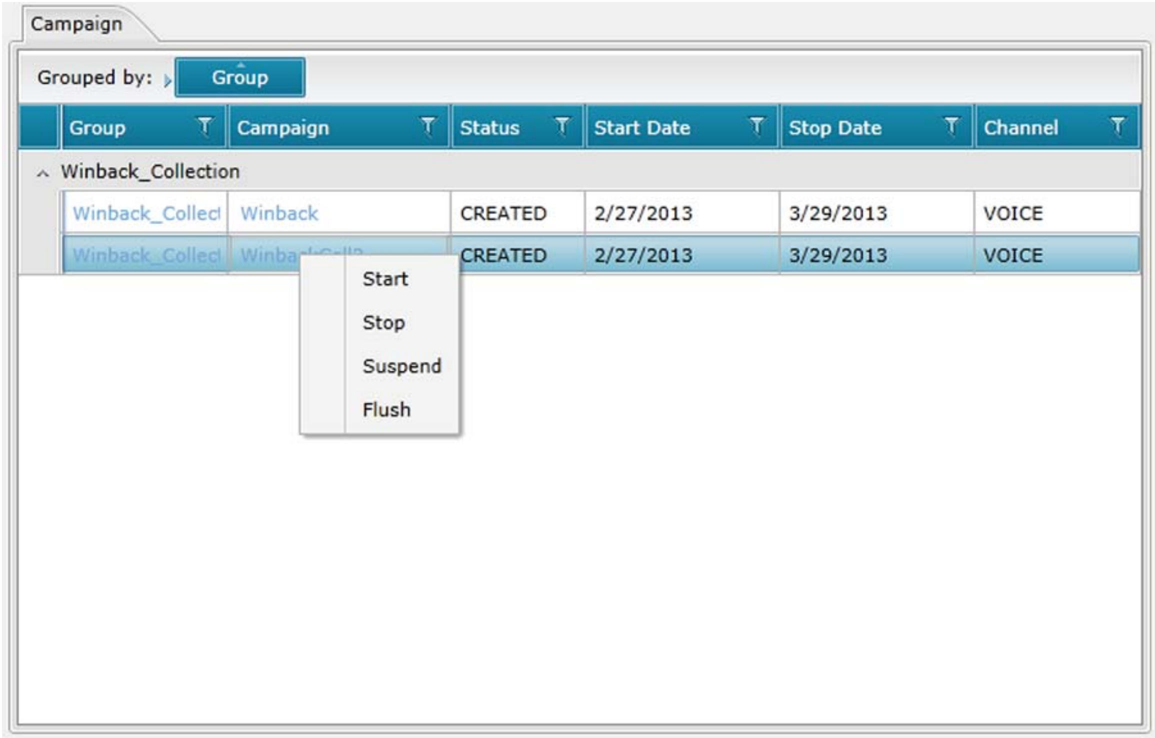
Click the SMS Templates tab to set an SMS template for a campaign. Follow the steps detailed in Email Templates to configure an SMS template.

4.2.17 Operating Campaigns

After you create and save a campaign and all associated information, you can start operating a campaign.

All the campaigns are listed in the Campaign tab. Right-click on a campaign to see campaign operation options as shown in Figure 4–62.

Figure 4–62 Campaign Operation Options



Refer Table 4–38 to learn more about the operations available to you for a specific campaign.

Table 4–38 Campaign Operation Options

Option	Description
Start	Launches a campaign. **Note:** You have to manually use this method to launch a campaign the first time after you create it.
Stop	Stops a campaign.
Suspend	Suspends a campaign. **Note:** A suspended campaign resumes at the next configured start time.
Flush	Closes all contacts pertaining to this campaign, both on LCM and the dialer.

Chapter 5

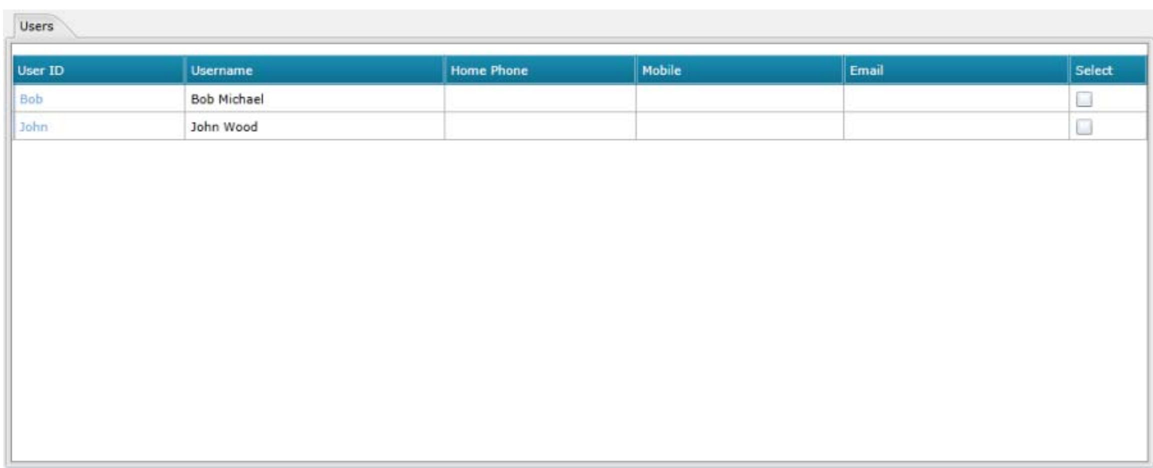
Users and Roles

On LCM Console, you can create users and assign roles to these users. Based on access rights, users access modules to accomplish tasks appropriate to the roles assigned to them. This chapter deals with user and role management.

5.1 Users

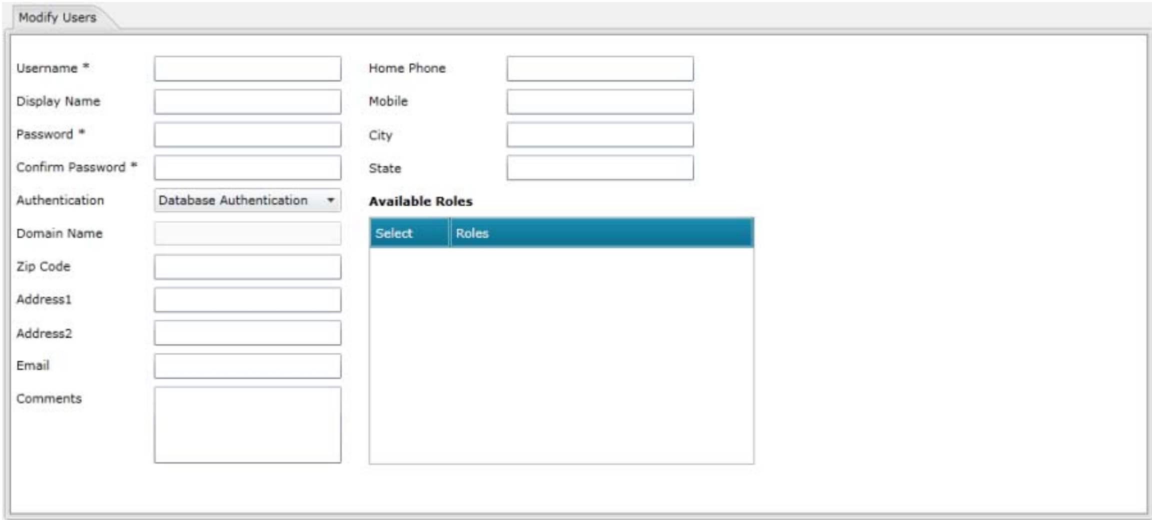
Click the **Users** icon in the module strip on the right to open the **Users** tab as shown in Figure 5–1.

Figure 5–1 Users



Click **Create** in the **Actions** pane to open the **Modify Users** tab as shown in Figure 5–2.

Figure 5–2 Create/Modify Users



Complete the fields as described in Table 5–1.

Table 5–1 Create/Modify Users - Details

Field	Action	Description
Username	Enter a username for the user..	A name for the user you want to create.
Home Phone	Enter a phone number.	A home phone number for this user.
Display Name	Enter a name for the user.	A name for user you want to create.
Mobile	Enter a phone number.	A mobile phone number for this user.
Password	Enter a password.	A password to enable the user to login to the application.
City	Enter a city name.	The city to which this user belongs to.
Confirm Password	Re-enter the password.	A confirmation for the password you assigned to a user.
State	Enter a state name.	The state to which this user belongs.
Authentication	Select from drop-down list.	The authentication type using which you will authenticate user credentials for this user.
Domain Name	Enter domain name.	The domain that the user belongs to. **Note:** Applicable only if Authentication Type is Windows Authentication.
Zip Code	Enter a zip code.	The zip code for this user.

Field	Action	Description
Address1	Enter the first line of the user address.	The first part of the address for this user.
Address2	Enter the second line of the user address.	The second part of the address for this user.
Email	Enter an email id.	An email id for this user.
Comments	Enter text.	Enter some comments tells something about the user.

After completing the fields, select the appropriate checkboxes to assign roles to this user from the **Available Roles** panel.

Click **Save** in the **Actions** pane to save the record. A dialog box confirming the new user disappears in a few seconds. The user you created is displayed in the **Users** tab.

To modify a user, select a user from the displayed list of users in the **Users** tab. Make the required changes and click **Save** in the **Actions** pane. A dialog box confirming the update disappears in a few seconds.

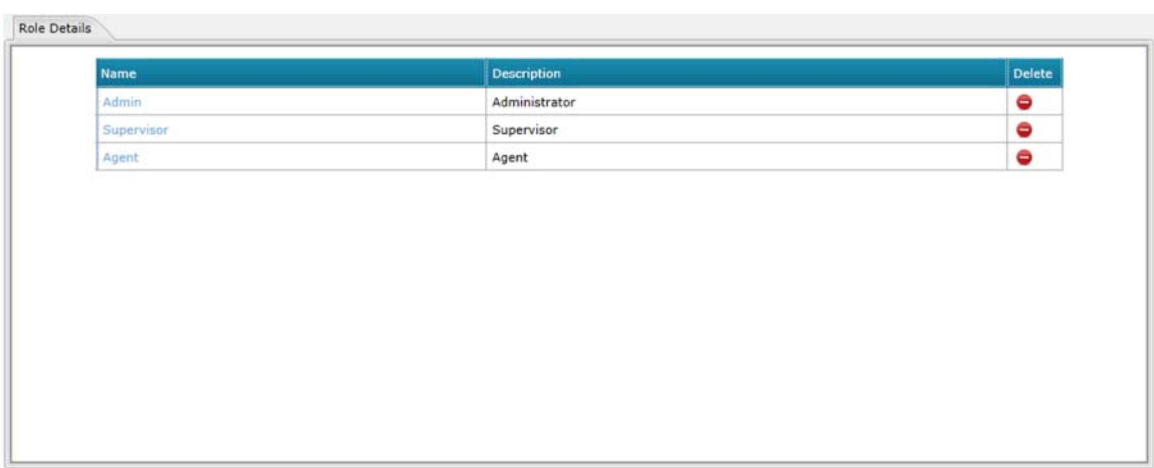
To delete a user, select the checkbox from the **Select** column in the **Users** tab appropriate to the user you want to delete. Click **Delete** in the **Actions** pane to delete a user. A dialog box confirming the deletion disappears in a few seconds.

5.2 Roles

You can create new roles on LCM Console and assign them to users. Users will have access only to those modules that these assigned roles authorize.

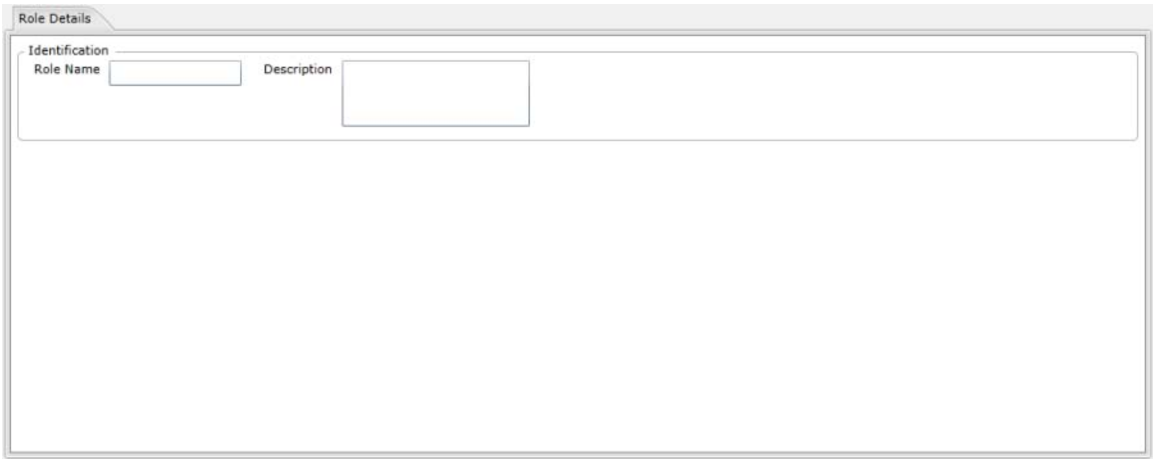
To create a role, click **Role** in the module components to open the **Role Details** tab as shown in Figure 5–3.

Figure 5–3 Roles



Click **Create** in the **Actions** pane to populate the **Identification** details in the **Role Details** tab as shown in Figure 5–4.

Figure 5–4 Create Role - Details



Enter a name for the role in the **Role Name** field. Enter a **Description**.

Click **Save** in the **Actions** pane to save your new role. The new role is displayed in the Role Details tab. A dialog box confirming the action disappears in a few seconds.

To modify a role, select a role displayed in the **Role Details** tab. Make the required changes and click **Save** in the **Actions** pane. A dialog box confirming the update disappears in a few seconds. For assigning rights to roles see Assigning Rights to Roles.

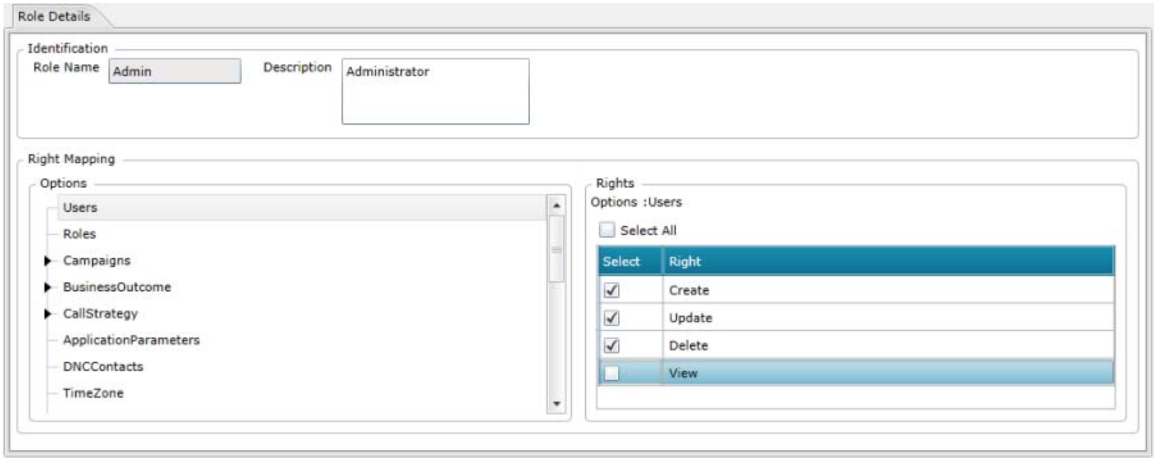
To delete a role, click the **Delete** icon alongside the displayed roles in the **Role Details** tab. A dialog box confirming the deletion disappears in a few seconds.

5.3 Assigning Rights to Roles

After you have created roles, you have to assign rights to each role. These rights define how far and wide a user assigned to a specific role will be allowed access on the LCM application.

Click the **Role** module component to open the **Role Details** tab as shown in Figure 5–5. The roles are listed in the **Role Details** tab. Click a role under the **Name** column of the role listing to open the **Right Mapping** section.

Figure 5–5 Mapping Rights to Roles



The **Options** column on the left lists the various options available for which you can assign right to this role. The **Options** column contains the following options for you to assign rights:

- Users
- Roles
- Campaigns: You can expand this to select specific campaign groups to assign rights. You can further expand the campaign groups to assign rights to campaigns.
- BusinessOutcome: You can expand this to select specific business outcome groups.
- CallStrategy: You can expand this to select a specific call strategy.
- ApplicationParameters
- DNCContacts
- TimeZone
- ChannelConfiguration
- Holidays
- Global Upload
- ScheduleReports
- StateLaws
- ModeConfig
- URL
- Reports
- CallGuide
- Alerter

- AreaZipCode
- TelephonyOutcome
- EMAIL
- SMS
- Dimension
- Profile

The Rights column on the right contains the following:

- Option: The option of your choice is listed here. The rights you now assign to this role will decide the level of access for this specific option.
- Select All: Select this checkbox if you choose to assign all rights to this role for this specific option.
- Rights Listing with selectable checkboxes: If you wish to assign selective rights to this role for this particular option, you can select the appropriate checkboxes from this table.

Note: Depending upon the choice of Option from the left, the Rights offered for selection dynamically vary.

To revoke rights to a role, you may deselect the checkbox appropriate to the option and the right to revoke.

Chapter 6

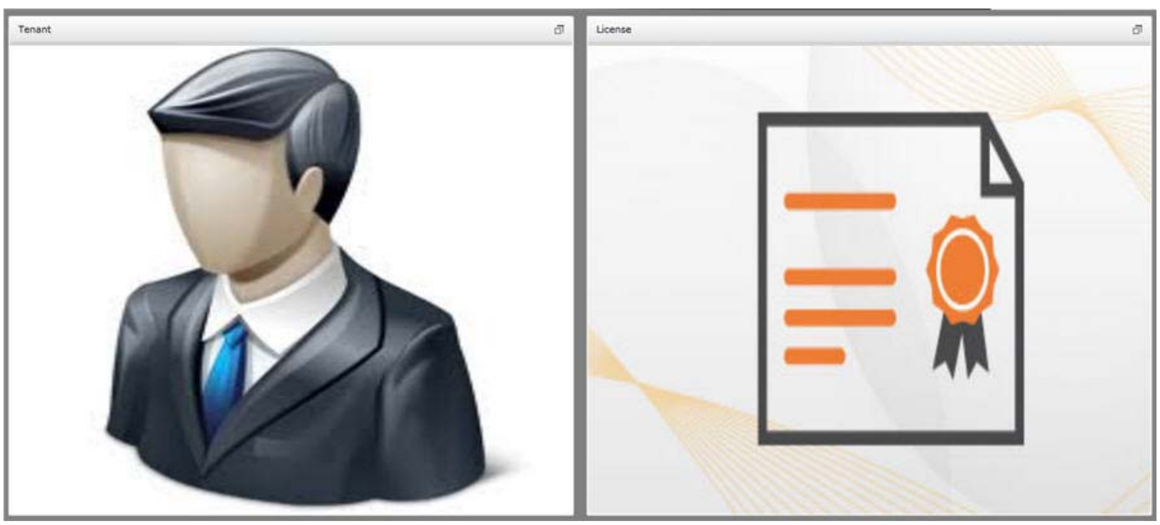
Tenants

Contact centers without dialers can also use LCM in a hosted model. All they require is a hosting arrangement for the Unified CCE dialer and LCM Console.

The LCM Console administrator creates a tenant and provides access rights through a secure URL. The contact center administrator uses the rights and creates campaign groups by synchronizing with the Unified CCE dialer. The administrator can create campaigns in LCM Console under these campaign groups and perform all activities necessary to run a campaign.

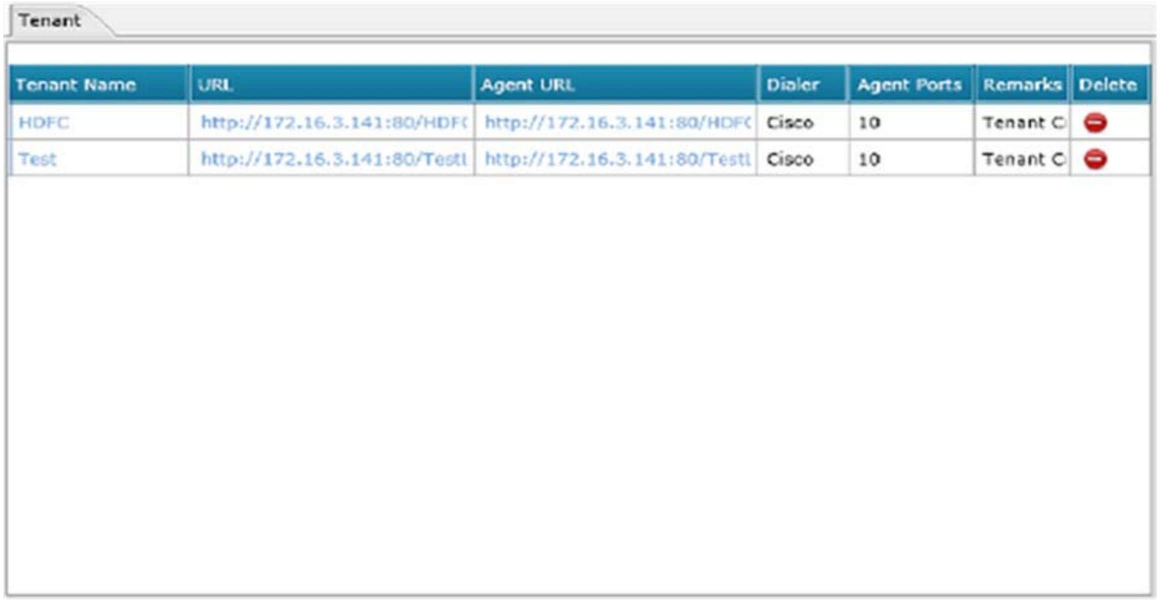
Login to LCM Console as a super-administrator to see the home page displaying only the **Tenant** and **License** icons as shown in Figure 6–1.

Figure 6–1 Home Page - Super-administrator



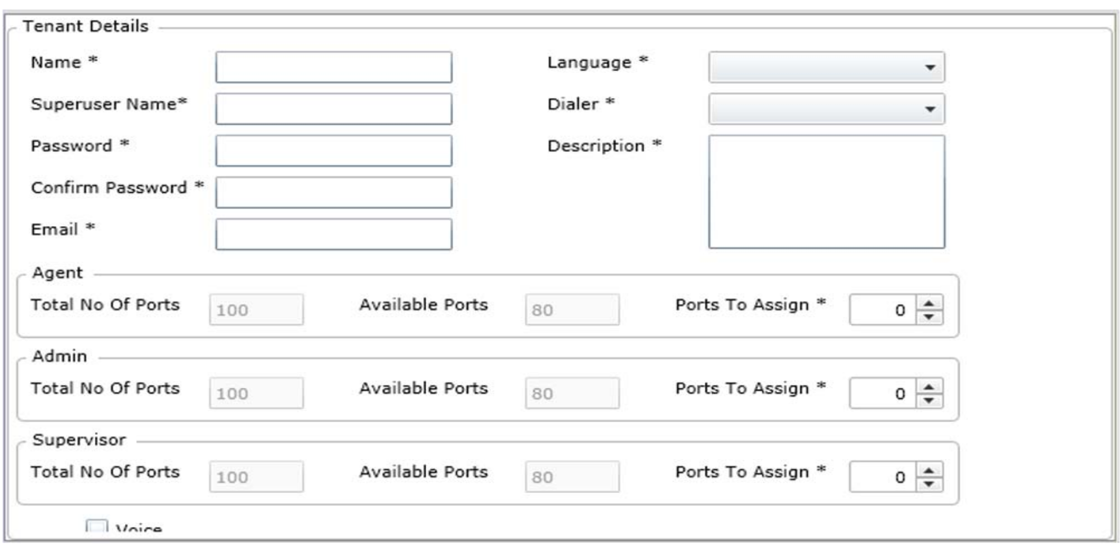
Click the **Tenant** icon to open the **Tenant** tab as shown in Figure 6–2. The list of tenants is displayed in the **Tenants** tab.

Figure 6–2 Tenant



To create a new tenant, click **Create** in the **Actions** pane. The **Tenant** tab is populated with fields required to create a new tenant as shown in Figure 6–3.

Figure 6–3 Create New Tenant



Complete the fields with details in Table 6–1.

Table 6–1 Create Tenant - Details

Field	Action	Description
Name	Enter a tenant name.	A name for the tenant you want to create.
Language	Select from drop-down list.	The language for LCM Console for this tenant.
Superuser Name	Enter a superuser name.	The superuser name who creates this tenant.
Dialer	Select from drop-down list.	The dialer that LCM Console will send contacts to in respect of this tenant.
Password	Enter a password.	The password for the superuser.
Description	Enter a description	The description, or some comments, about the tenant.
Confirm Password	Re-enter the password.	A confirmation for the password.
(Agent) Total No of Ports	Enter a number.	The total number of ports available.
(Agent) Available Ports	Enter a number.	The number of free ports available for agents.
(Agent) Ports to Assign	Select from drop-down list.	The number of ports to assign for agents.
(Admin) Total No of Ports	Enter a number.	The total number of ports available.
(Admin) Available Ports	Enter a number.	The number of free ports available for administrators.
(Admin) Ports to Assign	Select from drop-down list.	The number of ports to assign for administrators.
(Supervisor) Total No of Ports	Enter a number.	The total number of ports available for supervisors.
(Supervisor) Available Ports	Enter a number.	The number of free ports available for supervisors.
(Supervisor) Ports to Assign	Select from drop-down list.	The number of ports to assign for supervisors.
Voice	Select checkbox.	Whether the tenant will run voice campaigns.
Email	Enter an email id.	The tenant email id.

Click **Save** in the **Actions** pane. A dialog box confirming the new tenant will disappear in a few seconds. LCM Console auto-generates a URL for the tenant. An auto-generated email is sent to the tenant communicating this URL to access LCM Console. The new tenant is now displayed in the **Tenant** tab.

Click any entry in the **Tenant Name** column to modify tenant details. Make the required changes and click **Save** in the **Actions** pane to update your changes. A dialog box confirming the update disappears in a few seconds.

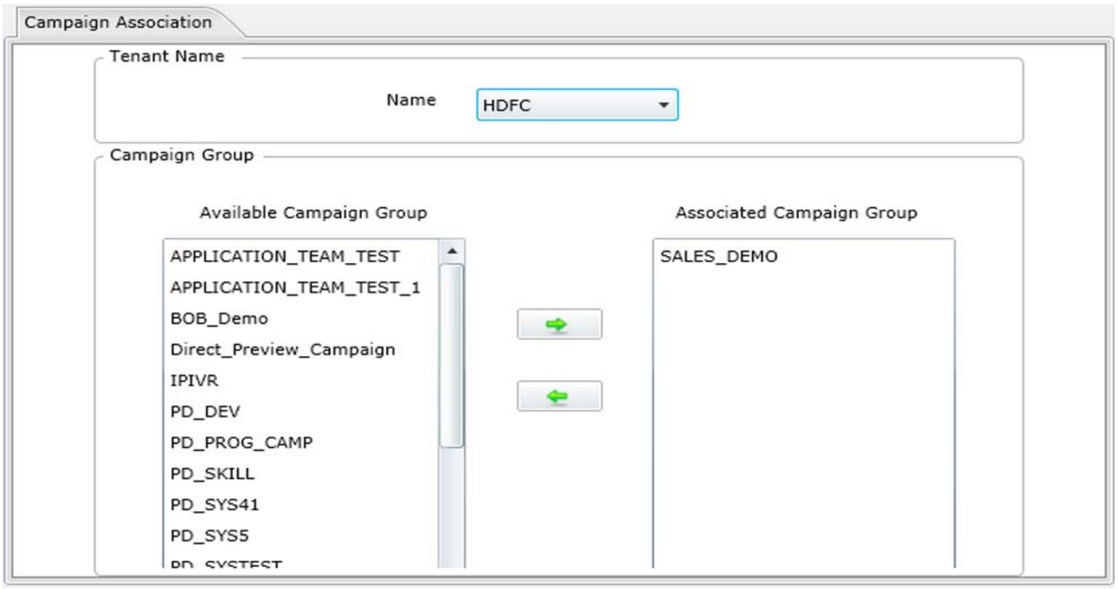
Click the **Delete** icon against a tenant to delete a tenant. A dialog box confirming the deletion disappears in a few seconds.

6.1 Campaign Association

After you have created a tenant, you have to associate campaigns to the tenant. Only then will the tenant be able to access LCM Console to configure and operate campaigns that are part of the tenancy.

Click the **Campaign Association** module component to open the **Campaign Association** tab as shown in Figure 6–4.

Figure 6–4 Campaign Association



In the **Tenant Name** section, select a **Name** from the drop-down list for whom you want to associate campaigns with.

The **Campaigns** section has two panels. The **Available Campaigns** are listed on the left panel and the **Selected Campaigns** on the right. Select campaigns from the **Available Campaigns** list and use the arrow pointing to the right to move them to the **Selected Campaigns** list.

To dissociate a campaign from a tenant, select a campaign from the **Selected Campaigns** list and use the arrow pointing to the left to move the campaign back to the **Available Campaigns** list.

Click Sync in the Actions pane. The campaigns are successfully associated/dissociated to/from the selected tenant.

Chapter 7

Reports

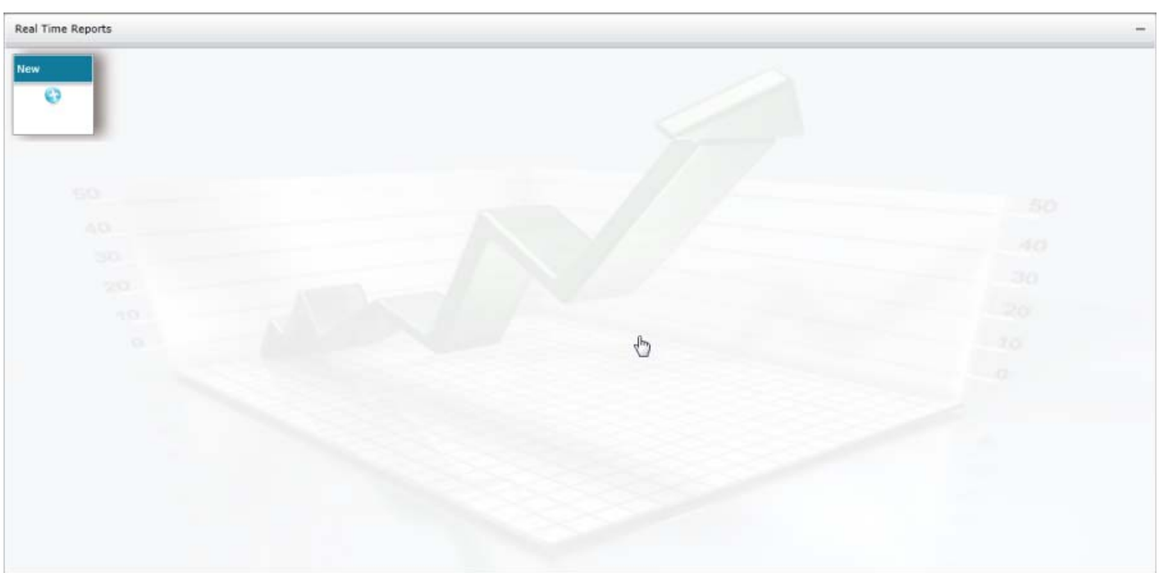
A wide range of reporting options are available on LCM Console. There are two types of reports that LCM Console provides:

- **Real Time Reports** – These reports show in real time, that is, as the campaigns are running. You can select campaigns and upload lists to view appropriate reports in real time.
- **Historical Reports** – These reports provide details for chosen parameters for a past period of your choice. You have the option of choosing the days/dates by multiple methods.

7.1 Real Time Reports

Click **Real Time Reports** in the **Modules** pane on the right to open the **Real Time Reports** page as shown in Figure 7–1. The screen opens the **Real Time Reports** module component by default.

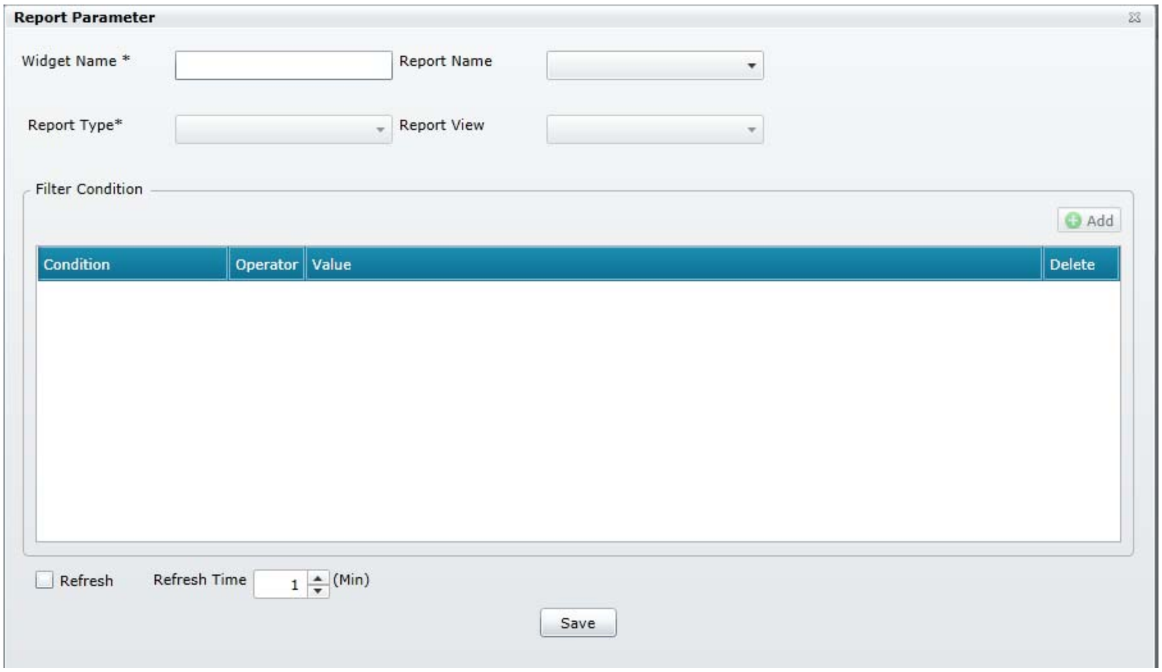
Figure 7–1Real Time Report



Report Parameters

Click the **New** icon to open the **Report Parameter** pop up as shown in Figure 7–2.

Figure 7–2Report Parameter



Complete the **Report Parameters** pop up with details in Table 7–1.

Table 7–1 Report Parameters - Details

Field	Action	Description
Widget Name	Enter a name.	The report widget name.

Field	Action	Description
Report Name	Select from drop-down list.	Select from • **Active Contacts:** To see the report for active contacts only for all selected campaigns and list IDs. • **Outcome Metrics:** To see the report for various outcomes for selected campaigns and list IDs. • **Dial Metrics:** To see the report for various parameters like dialed calls, rescheduled calls, etc. for today and beyond. • **Outcome:** To see the outcomes for the selected campaigns and list IDs. • **Category:** To see the report for various categories under the selected campaign and list IDs. • **Category Target:** To see the report for targets achieved for various categories under the selected campaign and list IDs • **Contact & Attempt:** To see the report for total contacts uploaded, open contacts, never dialed contacts, etc.
Report Type	Select from drop-down list.	Select from • **Attempt Type:** To see the report for attempts made for contacts for the selected campaign and list IDs. This is the only option available for all reports except **Contacts**. • **Contact Type:** To see the entire activity listing for each contact in the selected campaign and list IDs. This type is available only for **Contacts** report.

Field	Action	Description
Report View	Select from drop-down list.	How you want the data to be presented for viewing. Options are: • **Summation View:** Displays reports with complete data summed up. • **Comparison View:** Displays reports with data for specific intervals (Interval, Hour, Day, and Month) for selected conditions. **Note:** This option is available only for **Outcome**, **Category**, **Category Target** , and **Contact & Attempt** reports only. • **Entity View:** Displays reports for each entity that you have selected in the filter condition. **Note:** This option is available only for **Outcome, Category,** and **Contact & Attempt** reports only.

Filter Conditions

Click the **Add** button located on the top right of the condition builder. Complete the **Filter Condition** with details as in Table 7–2.

Table 7–2 Filter Condition - Report Parameters

Field	Action	Description
Condition	Select from drop-down list.	Select an appropriate condition from the drop-down list.
Operator	No action required	Pre-selected as equal to (=).
Value	Select from drop-down list.	The available values are populated based on the selected **Condition**. **Note:** Where multiple selection is allowed, select the appropriate checkboxes or the **Select All** checkbox for selecting all options.
Delete	Click **Delete** button.	Select to delete this filter row.

How Filter Condition Works: In most cases, once you have made a multiple selection for an entity, you cannot select another lower entity. See Table 7–3 for how filter condition works.

Table 7–3 Filter Condition Hierarchy

Entity	Single Selection	Multiple Selection
GlobalList ID	Allows further selection of Campaign Group ID or Campaign ID.	No further selection allowed. View report at this level.
Campaign Group ID	Allows further selection of Campaign ID.	No further selection allowed. View report at this level.
Campaign ID	Allows further selection of List ID or CSSGroupName	No further selection allowed. View report at this level.
List ID **Note:** You can also select the ListByDate option to see lists uploaded on specific dates, and then select a list ID from those populated.	Allows further selection.	Allows further selection.
CSSGroupName	Allows further selection of CSS ID.	Not allowed. View report at this level.
CSS ID	View report at this level. You can also select a List ID, if not already selected.	View report at this level.You can also select a List ID, if not already selected.

It is not mandatory that you have to go through the entire hierarchy to generate and view a report. You can click the **Save** button at any stage to view the report for the filter criteria selected.

After completing the **Report Parameters** and the **Filter Condition**, select the **Refresh** checkbox if you want your report refreshed periodically with fresh data. Select the **Refresh Time** (in minutes) from the number panel alongside to refresh the data.

Click **Save** (**Show**) to populate the report.

Report Intervals

Many report views offer the flexibility of seeing quarter-hourly, hourly, daily, and monthly data. The top portion of the report, below the report title, is the place where you choose the periodicity of your report.

Figure 7–3Report Periodicity Selector

If you can see this strip shown in Figure 7–3 on your report, use this as below:

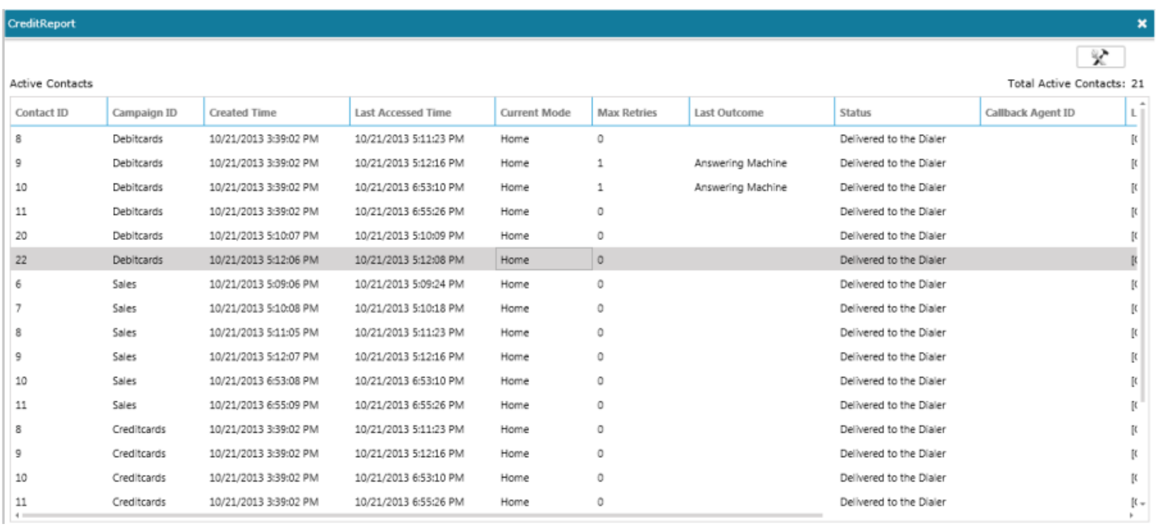
- Click the icon to see the report data for the day in 15-minute intervals.
- Click the icon to see the report data for the day in hourly intervals.
- Click the icon to see the report data for the month in daily intervals.
- Click the icon to see the report data for the year in monthly intervals.
- Click the icon to revert to the **Report Parameter** pop up (Figure 7–2) to change report parameters.
- Click the icon to delete a report widget.

7.1.1 Active Contacts

Contacts that the application delivers to the dialer are Active Contacts.

Active Contacts report displays a list of active contacts for the selected campaign and list ID. See Figure 7–4 for a sample of **Active Contacts** report.

Figure 7–4Active Contacts Report


CreditReport

Active Contacts

Total Active Contacts: 21

Contact ID	Campaign ID	Created Time	Last Accessed Time	Current Mode	Max Retries	Last Outcome	Status	Callback Agent ID	L
8	Debitcards	10/21/2013 3:39:02 PM	10/21/2013 5:11:23 PM	Home	0		Delivered to the Dialer		[(
9	Debitcards	10/21/2013 3:39:02 PM	10/21/2013 5:12:16 PM	Home	1	Answering Machine	Delivered to the Dialer		[(
10	Debitcards	10/21/2013 3:39:02 PM	10/21/2013 6:53:10 PM	Home	1	Answering Machine	Delivered to the Dialer		[(
11	Debitcards	10/21/2013 3:39:02 PM	10/21/2013 6:55:26 PM	Home	0		Delivered to the Dialer		[(
20	Debitcards	10/21/2013 5:10:07 PM	10/21/2013 5:10:09 PM	Home	0		Delivered to the Dialer		[(
22	Debitcards	10/21/2013 5:12:06 PM	10/21/2013 5:12:08 PM	Home	0		Delivered to the Dialer		[(
6	Sales	10/21/2013 5:09:06 PM	10/21/2013 5:09:24 PM	Home	0		Delivered to the Dialer		[(
7	Sales	10/21/2013 5:10:08 PM	10/21/2013 5:10:18 PM	Home	0		Delivered to the Dialer		[(
8	Sales	10/21/2013 5:11:05 PM	10/21/2013 5:11:23 PM	Home	0		Delivered to the Dialer		[(
9	Sales	10/21/2013 5:12:07 PM	10/21/2013 5:12:16 PM	Home	0		Delivered to the Dialer		[(
10	Sales	10/21/2013 6:53:08 PM	10/21/2013 6:53:10 PM	Home	0		Delivered to the Dialer		[(
11	Sales	10/21/2013 6:55:09 PM	10/21/2013 6:55:26 PM	Home	0		Delivered to the Dialer		[(
8	Creditcards	10/21/2013 3:39:02 PM	10/21/2013 5:11:23 PM	Home	0		Delivered to the Dialer		[(
9	Creditcards	10/21/2013 3:39:02 PM	10/21/2013 5:12:16 PM	Home	0		Delivered to the Dialer		[(
10	Creditcards	10/21/2013 3:39:02 PM	10/21/2013 6:53:10 PM	Home	0		Delivered to the Dialer		[(
11	Creditcards	10/21/2013 3:39:02 PM	10/21/2013 6:55:26 PM	Home	0		Delivered to the Dialer		[(

See Table 7–4 for what the **Active Contacts** report contains.

Table 7–4 Active Contacts

Field	Description
Contact ID	The contact ID for the listed contact.
Campaign ID	The campaign to which the listed contact belongs to.
Created Time	The contact upload time.

Field	Description
Last Accessed Time	The time the contact was last accessed by the application.
Current Mode	The current mode for dialing the contact.
Max Retries	The maximum retries for the contact.
Last Outcome	The last telephony outcome for the contact.
Status	The status of the contact.
Callback Agent ID	The callback handling agent, if any, for this contact.
Last Filter Condition	The last filter condition based on which this contact is selected.
Allowed Max Retries	The number of remaining maximum retries.
Last Filter Group	The last filter group from where this contact is listed.

7.1.2 Outcome Metrics

Outcome-based real-time information including telephony and business outcomes are shown in this report. Complete the Report Parameters and Filter Conditions to see the following:

- **Outcome Reports** showing success and failure by count.
- **Abandon Reports** showing calls abandoned as percentage of total calls.

A sample outcome report is shown in Figure 7–5.

Figure 7–5Sample Outcome Report

A snapshot showing the widget name is popped up. The **Success %** shown in this snapshot is the percentage of contacts marked as success (for both telephony and business outcomes) for the chosen campaign and list IDs.

- **Processed Calls Graph** contains data and graph showing processed calls for the selected filter criteria. See Report Intervals for viewing data for various intervals.
- **Outcomes Graph** displays the data and graph for various outcomes for the selected filter criteria. See Report Intervals for viewing data for various intervals.
- **Abandoned Graph** displays the graph for abandoned calls for the selected filter criteria. See Report Intervals for viewing data for various intervals.

The **Success vs Failure** table contains the count and percentage of calls with successful and failed outcomes, with a breakup of reasons for failure outcomes, showing the count and percentage for each.

You can click on any outcome on the **Success vs Failure** table to see the count of calls pertaining to that outcome plotted on the **Outcomes** graph as shown in Figure 7–6. You can hover the mouse on the plotted area to see the count of calls for the selected outcome.

See Report Intervals for viewing data for various intervals.

Figure 7–6Outcome Plotted on Graph

You can view multiple reports for different campaigns or list IDs in one go and also save them.

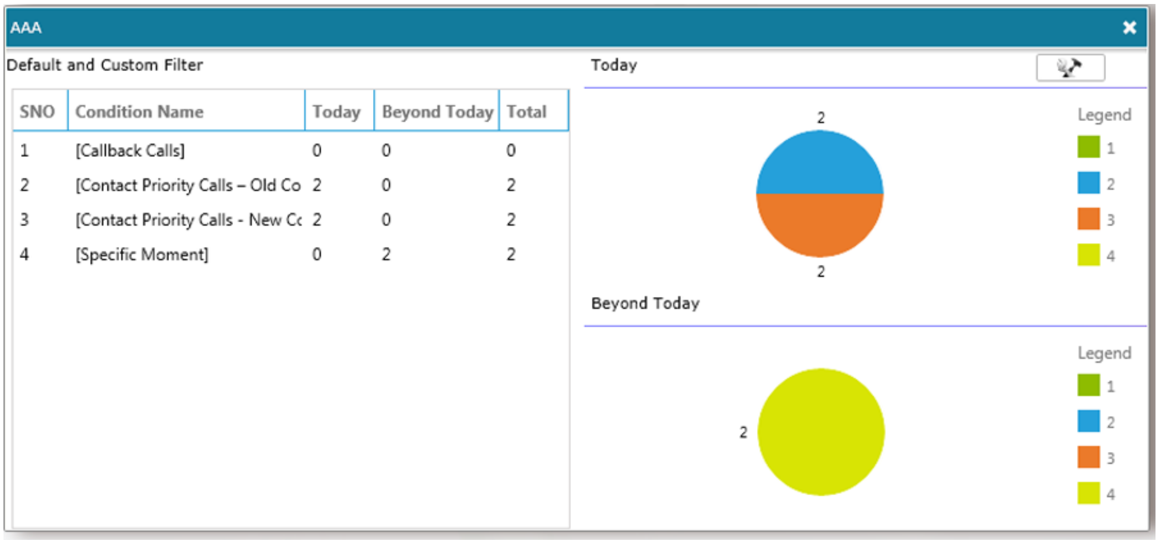
7.1.3 Dial Metrics

Dial Metrics real-time report is fetched based on the selected CSS group, and displays the number of contacts that need to be delivered for each CSS condition for today and a forecast for future days (titled as Beyond Today in the report). Complete the Report Parameters and Filter Conditions to see the report.

Note: The only filter selection available is Campaign ID. In addition to Campaign ID, you also have to select a **CSSGroupName** to generate the report.

See Figure 7–7 for a sample report.

Figure 7–7Dial Metrics Report



See Table 7–5 for what the **Dial Metrics** report contains.

Table 7–5 Dial Metrics

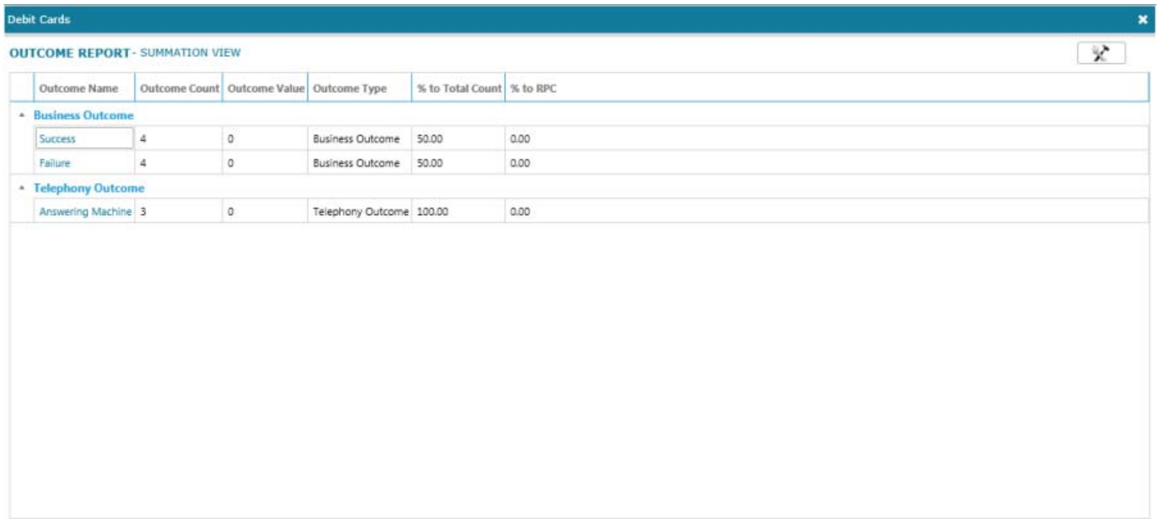
Field	Description
SNO	The serial number of the listing. **Note:** Use this serial number as the legend for interpreting the graphical representation of the data in this table.
Condition Name	The condition name in the selected CSS group.
Today	The number of contacts to be delivered today.
Beyond Today	The number of contacts to be delivered beyond today.
Total	The total number of contacts to be delivered for this CSS condition.

See Report Intervals for viewing data for various intervals.

7.1.4 Outcome

Outcome Report shows data for each business and telephony outcome, for the selected filter criteria, as set by the agents. Complete the Report Parameters and Filter Conditions to see the report. The **Summation View** of **Outcome** report is shown in Figure 7–8.

Figure 7–8Outcome - Summation



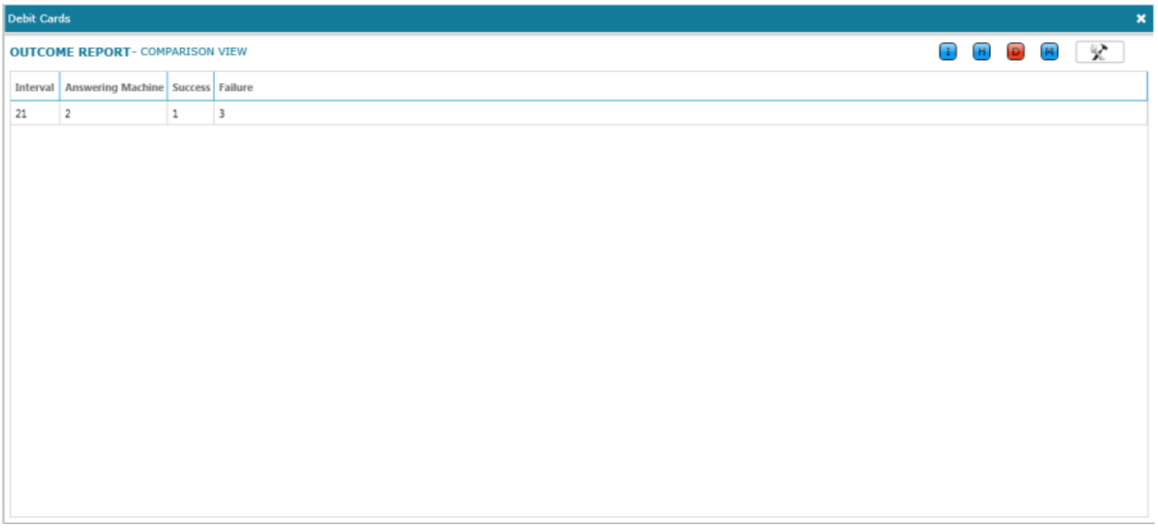
See Table 7–6 for what the **Outcome** report contains in the **Summation View**.

Table 7–6 Outcome - Summation

Field	Description
Outcome Name	The outcome name as defined.
Outcome Count	The count of contacts with this outcome.
Outcome Value	The total value for this outcome.
Outcome Type	The outcome type - Business of Telephony.
% to Total Count	The percentage of this outcome to the total outcome count.
% to RPC	The percentage of outcomes to the total RPC (right party connect).

The **Comparison View** shows the count for each chosen outcome for the specified filter conditions. The **Comparison View** of **Outcome** report is shown in Figure 7–9.

Figure 7–9Outcome - Comparison



See Table 7–7 for what the **Outcome** report contains in the **Comparison View.**

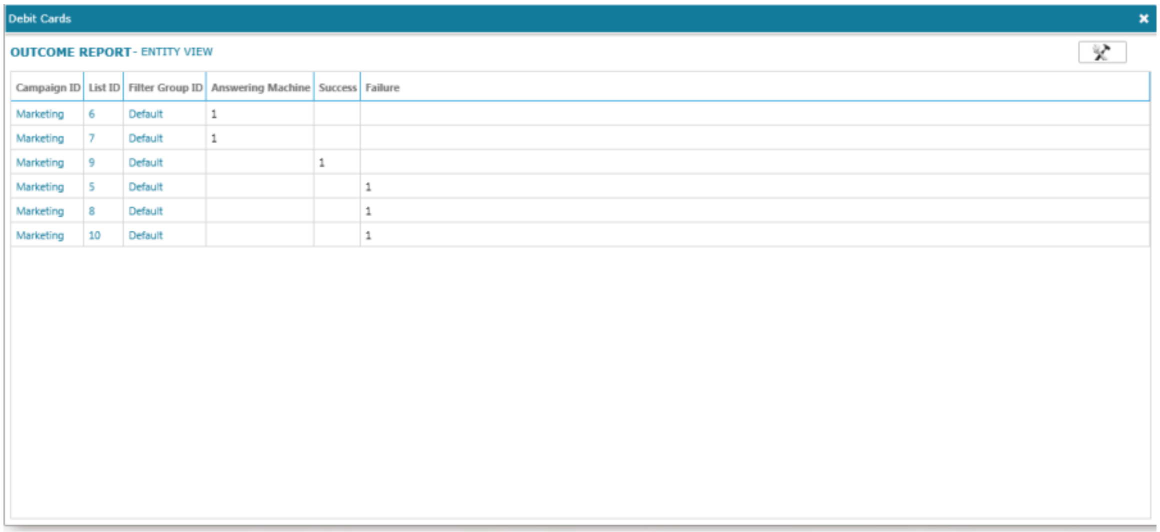
Table 7–7 Outcome - Comparison

Field	Description
Interval	The date for which outcomes are tabulated.
Answering Machine	The count of contacts that have **Answering Machine** as outcome.
Success	The count of calls that were successful.
Failure	The count of calls that were a failure.

Note: Table 7–7 is illustrative showing only three outcomes. The report lists the count for each outcome in a separate column.

The **Entity View** shows the count for each chosen outcome for each specified filter condition, or entity, separately. The **Entity View** of **Outcome** report is shown in Figure 7–10.

Figure 7–10Outcome - Entity


Debit Cards

OUTCOME REPORT - ENTITY VIEW

Campaign ID	List ID	Filter Group ID	Answering Machine	Success	Failure
Marketing	6	Default	1		
Marketing	7	Default	1		
Marketing	9	Default		1	
Marketing	5	Default			1
Marketing	8	Default			1
Marketing	10	Default			1

See Table 7–8 for what the **Outcome** report contains in the **Entity View**.

Table 7–8 Outcome - Entity

Field	Description
Campaign ID	The campaign ID for which outcomes are displayed.
List ID	The list ID, within the above campaign, for which outcomes are displayed.
Filter Group ID	The filter group ID (in this case, CSS) for which outcomes are displayed.
Answering Machine	The count of contacts that have **Answering Machine** as outcome - that is, calls have not been answered by the intended person.
Success	The count of calls that were successful.
Failure	The count of calls that were a failure.

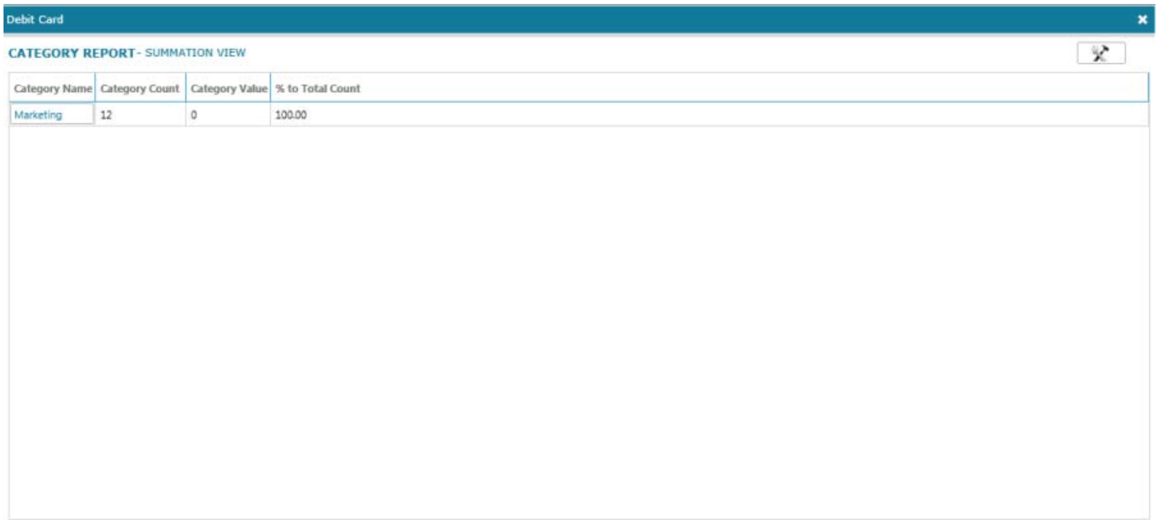
Note: Table 7–8 is illustrative. If more filter conditions are chosen, and also if more outcomes are available, the report lists the count for each filter condition in a separate row, and each outcome in a separate column.

See Report Intervals for viewing data for various intervals.

7.1.5 Category

Category report displays the count and value for categories in the selected filter criteria. Complete the Report Parameters and Filter Conditions to see the report. The **Summation View** of **Category** report is shown in Figure 7–11.

Figure 7–11Category - Summation



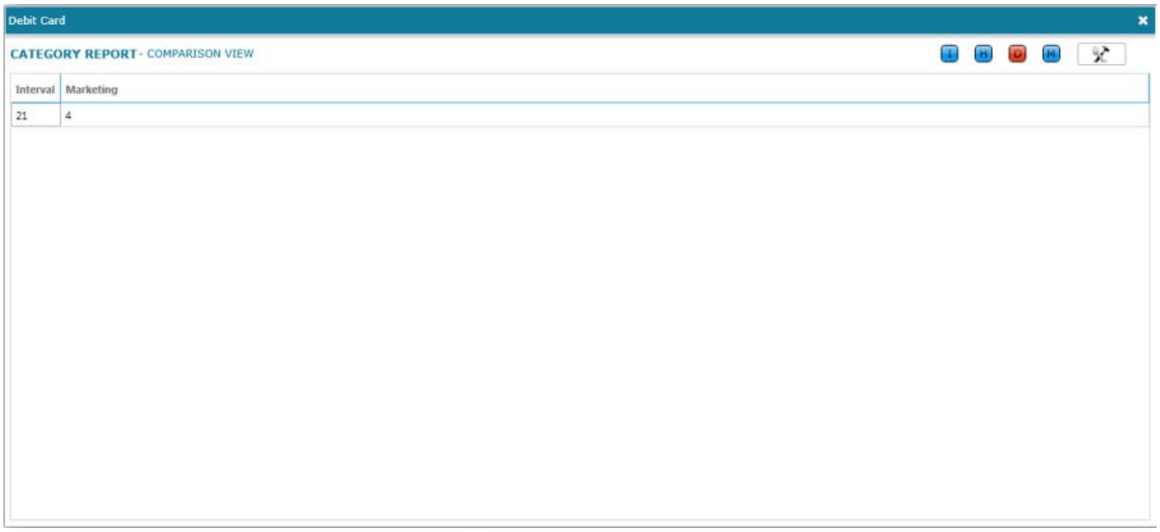
See Table 7–9 for what the **Category** report contains in the **Summation View**.

Table 7–9 Category - Summation

Field	Description
Category Name	The category name as defined.
Category Count	The count of contacts with this category of outcomes.
Category Value	The total value for this category of outcomes.
% to Total Count	The percentage of this category to the total category count.

The **Comparison View** shows the count for each chosen category of outcomes for the specified filter conditions. The **Comparison View** of **Category** report is shown in Figure 7–12.

Figure 7–12Category - Comparison



See Table 7–10 for what the **Category** report contains in the **Comparison View**.

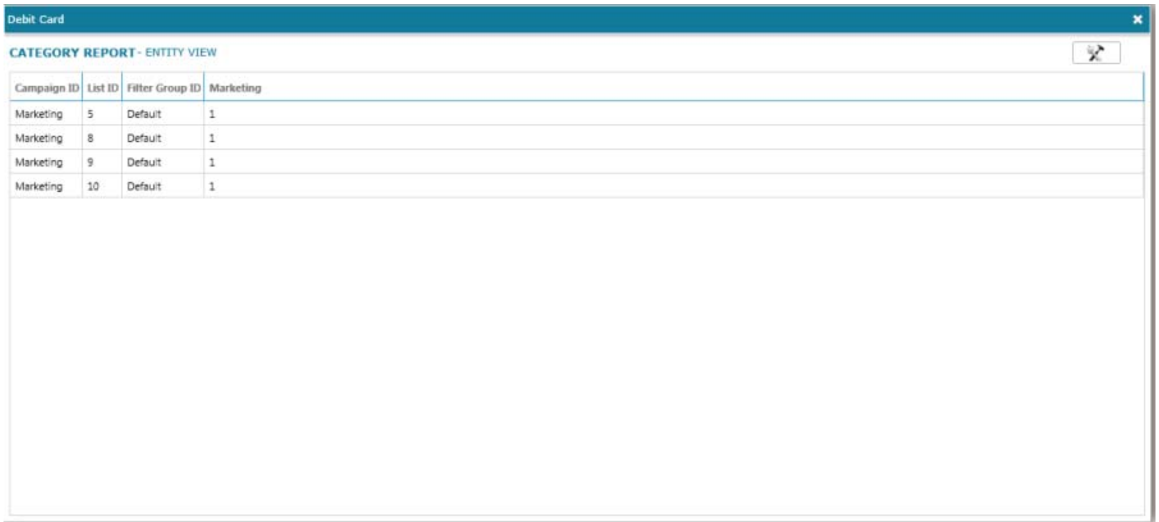
Table 7–10 Category - Comparison

Field	Description
Interval	The date for which category of outcomes is tabulated.
Category Name	The count of contacts with each category shown in a separate column.

Note: Table 7–10 is illustrative showing only one category. The report lists the count for each category in a separate column.

The **Entity View** shows the count for each chosen category of outcome for each specified filter condition, or entity, separately. The **Entity View** of **Category** report is shown in Figure 7–13.

Figure 7–13Category - Entity



See Table 7–11 for what the **Category** report contains in the **Entity View**.

Table 7–11 Category - Entity

Field	Description
Campaign ID	The campaign ID for which categories of outcomes are displayed.
List ID	The list ID, within the above campaign, for which categories are displayed.
Filter Group ID	The filter group ID (in this case, CSS) for which categories are displayed.
Category Name	The count of contacts with each category shown in a separate column.

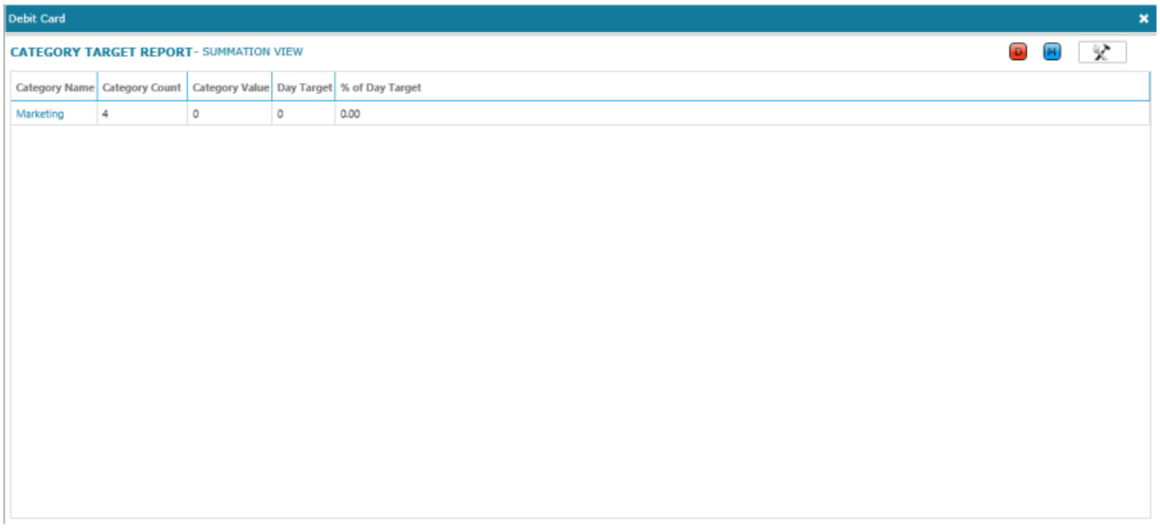
Note: Table 7–11 is illustrative. If more filter conditions are chosen, and also if more categories are available, the report lists the count for each filter condition in a separate row, and each category in a separate column.

See Report Intervals for viewing data for various intervals.

7.1.6 Category Target

Category Target report displays the count and value for categories in the selected filter criteria. In addition, this report also contains the target for the selected interval and the percentage completion of target. Complete the Report Parameters and Filter Conditions to see the report. The **Summation View** of **Category Target** report is shown in Figure 7–14.

Figure 7–14Category Target - Summation



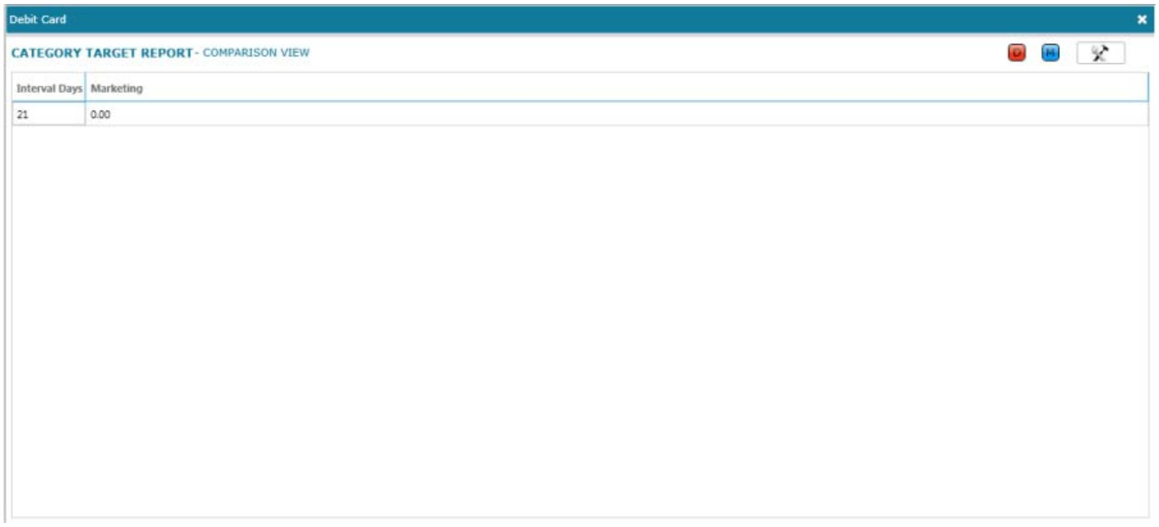
See Table 7–12 for what the **Category Target** report contains in the **Summation View**.

Table 7–12 Category Target - Summation

Field	Description
Category Name	The category name as defined.
Category Count	The count of contacts with this category of outcomes.
Category Value	The total value for this category of outcomes.
Day Target	The target set for the day for this category of outcomes
% of Day Target	The percentage of the day target met for this category of outcomes.

The **Comparison View** shows the count for each chosen category of outcomes for the specified filter conditions. The **Comparison View** of **Category Target** report is shown in Figure 7–15.

Figure 7–15Category Target - Comparison



See Table 7–13 for what the **Category Target** report contains in the **Comparison View**.

Table 7–13 Category Target - Comparison

Field	Description
Interval Days	The date for which category of outcomes is tabulated
Category Name	The target for each category of outcomes is shown in a separate column.

Note: Table 7–13 is illustrative showing only one category. The report lists the count for each category in a separate column.

Note: The **Category Target** report does not have an **Entity View**.

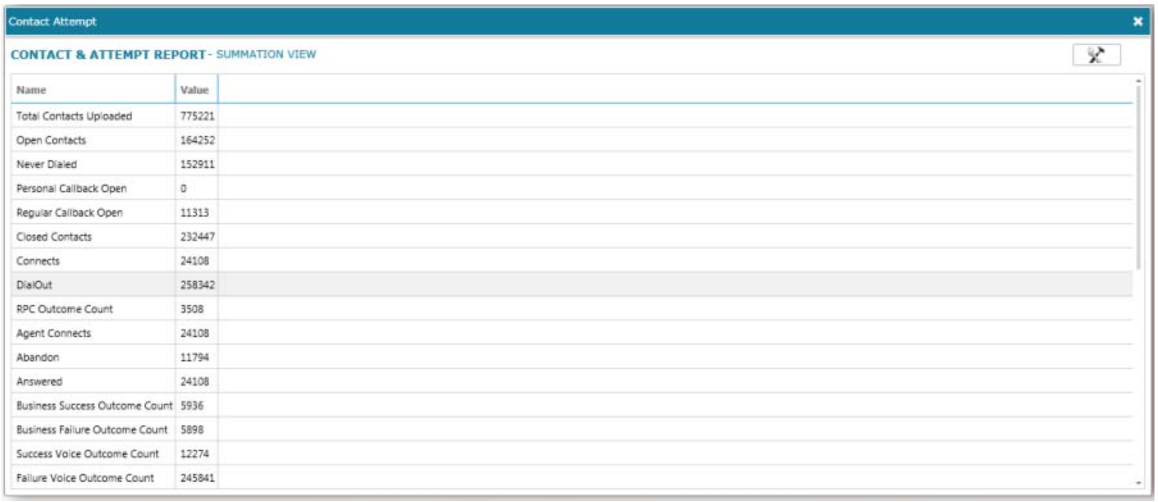
See Report Intervals for viewing data for various intervals.

7.1.7 Contact & Attempt

7.1.7.1 Contact Type

In the **Contact Type**, **Contact & Attempt** report displays the complete details like contacts uploaded, open contacts, never dialed, etc. for lists in the selected filter criteria. Complete the Report Parameters and Filter Conditions to see the report. The **Summation View** of **Contact & Attempt** report is shown in Figure 7–16.

Figure 7–16Contact & Attempt - Summation



See Table 7–14 for what the **Contact & Attempt** report contains in the **Summation View**.

Table 7–14 Contact & Attempt - Summation

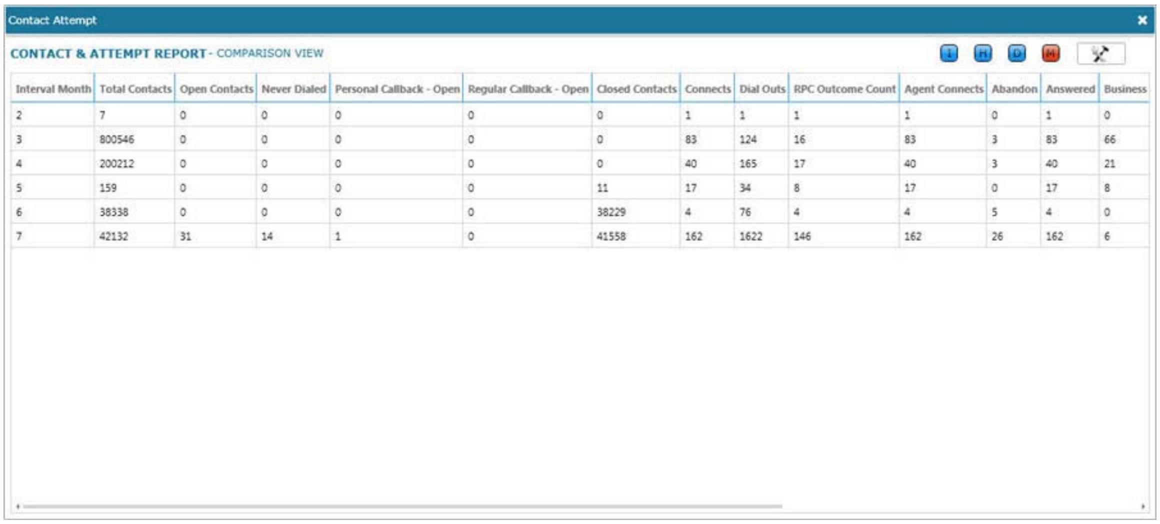
Field	Description
Total Contacts Uploaded	The total number of contacts uploaded for the selected filter criteria.
Open Contacts	The number of contacts still open.
Never Dialed	The number of contacts that have never been dialed.
Personal Callback Open	The number of contacts that have personal callback requests open.
Regular Callback Open	The number of contacts that have regular callback requests open.
Closed Contacts	The number of contacts closed.
Connects	The number of contacts dialed at least once from the total list.
DialOut	The number of contacts dialed out.
RPC Outcome Count	The number of contacts with RPC outcome.
Agent Connects	The number of dial outs successfully connected to agents from the list of contacts.
Abandon	The number of calls abandoned by either the dialer or the customer.
Answered	The number of calls successfully answered by the customer. (Agent Connects + Abandon)
Business Success Outcome Count	The number of calls with a successful business outcome.

Field	Description
Business Failure Outcome Count	The number of calls with a failed business outcome.
Success Voice Outcome Count	The number of calls with a successful telephony outcome.
Failure Voice Outcome Count	The number of calls with a failed telephony outcome.
Success Outcome	The total number of calls with successful business and telephony outcomes.
Failure Outcome	The total number of calls with failed business and telephony outcomes.
Personal Callback Close	The number of personal callback calls closed.
Regular Callback Close	The number of regular callback calls closed.
Churn %	The percentage of churned contacts. ((Contacts-Never Dialed)/Contacts) * 100
Complete %	The percentage of complete contacts. (Closed Contacts/Contacts) * 100
RPC %	The percentage of RPC contacts from the total dial outs. (RPC/Dial Outs) * 100
Hit Rate %	The percentage of agent connects from the total dial outs. (Agent Connects/Dial Outs) * 100
Abandon %	The percentage of calls abandoned from the total answered calls. (Abandon/Answered) * 100
Answered %	The percentage of answered calls. (Answered/Dial Outs) * 100
Success %	The percentage of calls with a successful outcome. (Success Outcome/Contacts) * 100
Business Success %	The percentage of calls with a successful business outcome from the total calls. (Success Business Outcome/Contacts) * 100
Business Success RPC %	The percentage of calls with a successful business outcome from the RPC calls. (Success Business Outcome/RPC) * 100
Average Dial Out per RPC Contact	The average dial out required for each RPC telephony outcome. Dial Outs/RPC
Average Dial Out per Closed Contact	The average dial out required for each closed contact. Dial Outs/Closed Contacts
Average Dial Out per Contact	The average dial out required for each contact. Dial Outs/Contact
Average Dial Out per Success Contact	The average dial out required for each contact with a successful telephony outcome. Dial Outs/Success Outcome

Field	Description
Average Dial Out per Business Success Contact	The average dial out required for each contact with a successful business outcome. Dial Outs/Business Success Outcome

The **Comparison View** shows the count for each chosen category of outcomes for the specified filter conditions. The **Comparison View** of **Contact & Attempt** report is shown in Figure 7–17.

Figure 7–17Contact & Attempt - Comparison



Interval Month	Total Contacts	Open Contacts	Never Dialed	Personal Callback - Open	Regular Callback - Open	Closed Contacts	Connects	Dial Outs	RPC Outcome Count	Agent Connects	Abandon	Answered	Business
2	7	0	0	0	0	0	1	1	1	1	0	1	0
3	800546	0	0	0	0	0	83	124	16	83	3	83	66
4	200212	0	0	0	0	0	40	165	17	40	3	40	21
5	159	0	0	0	0	11	17	34	8	17	0	17	8
6	38338	0	0	0	0	38229	4	76	4	4	5	4	0
7	42132	31	14	1	0	41558	162	1622	146	162	26	162	6

See Table 7–15 for what the **Contact & Attempt** report contains in the **Comparison View**.

Table 7–15 Contact & Attempt - Comparison

Field	Description
Interval	The interval(s) for which data is rendered on the report.
Total Contacts	The total number of contacts uploaded for the selected filter criteria.
Open Contacts	The number of contacts still open.
Never Dialed	The number of contacts that have never been dialed.
Personal Callback - Open	The number of contacts that have personal callback requests open.
Regular Callback - Open	The number of contacts that have regular callback requests open.
Closed Contacts	The number of contacts closed.
Connects	The number of contacts dialed at least once from the total list.
Dial Outs	The number of contacts dialed out.

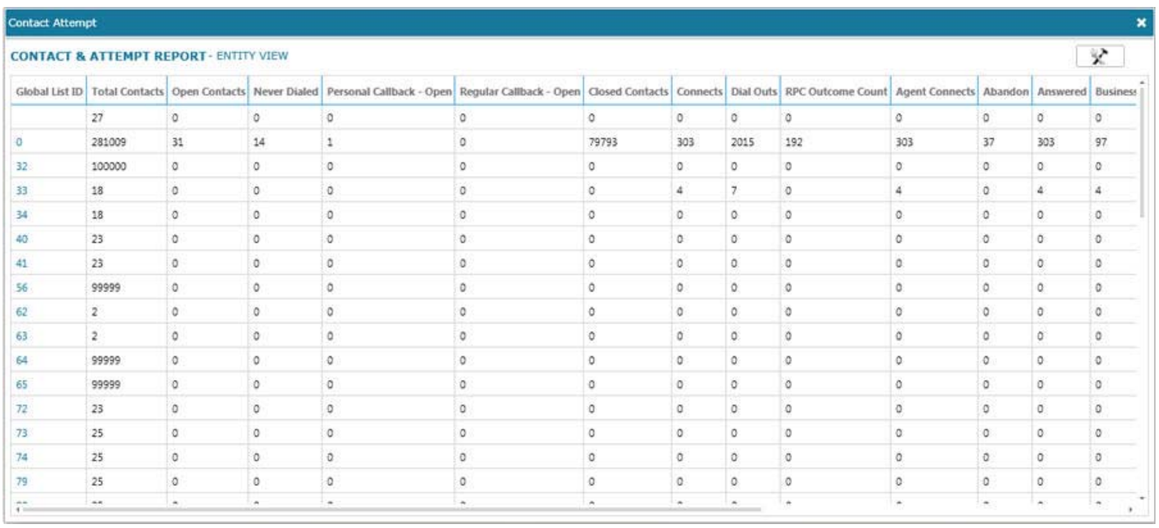
Field	Description
RPC Outcome Count	The number of contacts with RPC outcome.
Agent Connects	The number of dial outs successfully connected to agents from the list of contacts.
Abandon	The number of calls abandoned by either the dialer or the customer.
Answered	The number of calls successfully answered by the customer. (Agent Connects + Abandon)
Business Success Outcome Count	The number of calls with a successful business outcome.
Business Failure Outcome Count	The number of calls with a failed business outcome.
Success Voice Outcome Count	The number of calls with a successful telephony outcome.
Failure Voice Outcome Count	The number of calls with a failed telephony outcome.
Success Outcome	The total number of calls with successful business and telephony outcomes.
Failure Outcome	The total number of calls with failed business and telephony outcomes.
Personal Callback - Closed	The number of personal callback calls closed.
Regular Callback - Closed	The number of regular callback calls closed.
Churn %	The percentage of churned contacts. ((Contacts-Never Dialed)/Contacts) * 100
Complete %	The percentage of complete contacts. (Closed Contacts/Contacts) * 100
RPC %	The percentage of RPC contacts from the total dial outs. (RPC/Dial Outs) * 100
Hit Rate %	The percentage of agent connects from the total dial outs. (Agent Connects/Dial Outs) * 100
Abandon %	The percentage of calls abandoned from the total answered calls. (Abandon/Answered) * 100
Answered %	The percentage of answered calls. (Answered/Dial Outs) * 100
Success %	The percentage of calls with a successful outcome. (Success Outcome/Contacts) * 100
Business Success %	The percentage of calls with a successful business outcome from the total calls. (Success Business Outcome/Contacts) * 100
Business Success RPC %	The percentage of calls with a successful business outcome from the RPC calls. (Success Business Outcome/RPC) * 100

Field	Description
Average Dial Out per RPC Contact	The average dial out required for each RPC telephony outcome. Dial Outs/RPC
Average Dial Out per Closed Contact	The average dial out required for each closed contact. Dial Outs/Closed Contacts
Average Dial Out per Contact	The average dial out required for each contact. Dial Outs/Contact
Average Dial Out per Success Contact	The average dial out required for each contact with a successful telephony outcome. Dial Outs/Success Outcome
Average Dial Out per Business Success Contact	The average dial out required for each contact with a successful business outcome. Dial Outs/Business Success Outcome

See Report Intervals for viewing data for various intervals.

The **Entity View** shows the count for each chosen category of outcome for each specified filter condition, or entity, separately. The **Entity View** of **Contact & Attempt** report is shown in Figure 7–18.

Figure 7–18Contact & Attempt - Entity



Contact Attempt

CONTACT & ATTEMPT REPORT - ENTITY VIEW

Global List ID	Total Contacts	Open Contacts	Never Dialed	Personal Callback - Open	Regular Callback - Open	Closed Contacts	Connects	Dial Outs	RPC Outcome Count	Agent Connects	Abandon	Answered	Business
	27	0	0	0	0	0	0	0	0	0	0	0	0
0	281009	31	14	1	0	79793	303	2015	192	303	37	303	97
32	100000	0	0	0	0	0	0	0	0	0	0	0	0
33	18	0	0	0	0	0	4	7	0	4	0	4	4
34	18	0	0	0	0	0	0	0	0	0	0	0	0
40	23	0	0	0	0	0	0	0	0	0	0	0	0
41	23	0	0	0	0	0	0	0	0	0	0	0	0
56	99999	0	0	0	0	0	0	0	0	0	0	0	0
62	2	0	0	0	0	0	0	0	0	0	0	0	0
63	2	0	0	0	0	0	0	0	0	0	0	0	0
64	99999	0	0	0	0	0	0	0	0	0	0	0	0
65	99999	0	0	0	0	0	0	0	0	0	0	0	0
72	23	0	0	0	0	0	0	0	0	0	0	0	0
73	25	0	0	0	0	0	0	0	0	0	0	0	0
74	25	0	0	0	0	0	0	0	0	0	0	0	0
79	25	0	0	0	0	0	0	0	0	0	0	0	0

See Table 7–16 for what the **Contact & Attempt** report contains in the **Entity View**.

Table 7–16 Contact & Attempt - Entity

Field	Description
Entity	The entity for which data is rendered on the report.
Total Contacts	The total number of contacts uploaded for the selected filter criteria.
Open Contacts	The number of contacts still open.
Never Dialed	The number of contacts that have never been dialed.
Personal Callback - Open	The number of contacts that have personal callback requests open.
Regular Callback - Open	The number of contacts that have regular callback requests open.
Closed Contacts	The number of contacts closed.
Connects	The number of contacts dialed at least once from the total list.
Dial Outs	The number of contacts dialed out.
RPC Outcome Count	The number of contacts with RPC outcome.
Agent Connects	The number of dial outs successfully connected to agents from the list of contacts.
Abandon	The number of calls abandoned by either the dialer or the customer.
Answered	The number of calls successfully answered by the customer. (Agent Connects + Abandon)
Business Success Outcome Count	The number of calls with a successful business outcome.
Business Failure Outcome Count	The number of calls with a failed business outcome.
Success Voice Outcome Count	The number of calls with a successful telephony outcome.
Failure Voice Outcome Count	The number of calls with a failed telephony outcome.
Success Outcome	The total number of calls with successful business and telephony outcomes.
Failure Outcome	The total number of calls with failed business and telephony outcomes.
Personal Callback - Closed	The number of personal callback calls closed.
Regular Callback - Closed	The number of regular callback calls closed.
Churn %	The percentage of churned contacts. ((Contacts-Never Dialed)/Contacts) * 100
Complete %	The percentage of complete contacts. (Closed Contacts/Contacts) * 100

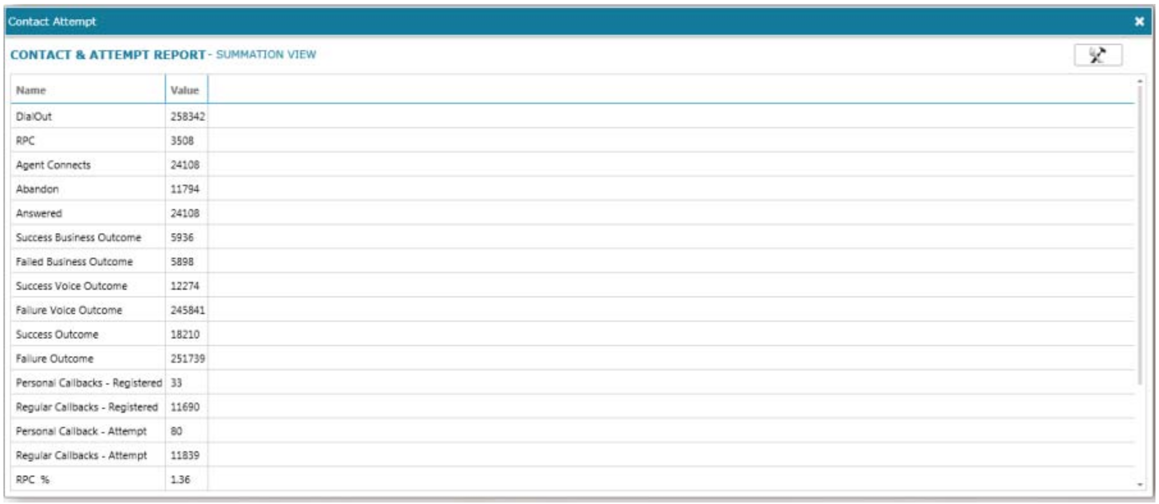
Field	Description
RPC %	The percentage of RPC contacts from the total dial outs. (RPC/Dial Outs) * 100
Hit Rate %	The percentage of agent connects from the total dial outs. (Agent Connects/Dial Outs) * 100
Abandon %	The percentage of calls abandoned from the total answered calls. (Abandon/Answered) * 100
Answered %	The percentage of answered calls. (Answered/Dial Outs) * 100
Success %	The percentage of calls with a successful outcome. (Success Outcome/Contacts) * 100
Business Success %	The percentage of calls with a successful business outcome from the total calls. (Success Business Outcome/Contacts) * 100
Business Success RPC %	The percentage of calls with a successful business outcome from the RPC calls. (Success Business Outcome/RPC) * 100
Average Dial Out per RPC Contact	The average dial out required for each RPC telephony outcome. Dial Outs/RPC
Average Dial Out per Closed Contact	The average dial out required for each closed contact. Dial Outs/Closed Contacts
Average Dial Out per Contact	The average dial out required for each contact. Dial Outs/Contact
Average Dial Out per Success Contact	The average dial out required for each contact with a successful telephony outcome. Dial Outs/Success Outcome
Average Dial Out per Business Success Contact	The average dial out required for each contact with a successful business outcome. Dial Outs/Business Success Outcome

Note: Table 7–16 is illustrative. If more filter conditions are chosen, and also if more categories are available, the report lists the count for each filter condition in a separate row, and each category in a separate column.

7.1.7.2 Attempt Type

In the **Attempt Type**, **Contact & Attempt** report displays the complete outcomes like number of contacts dialed out, RPC, agent connects, etc. for lists in the selected filter criteria. Complete the Report Parameters and Filter Conditions to see the report. The **Summation View** of **Contact & Attempt** report is shown in Figure 7–19.

Figure 7–19Contact & Attempt - Summation


Contact Attempt

CONTACT & ATTEMPT REPORT - SUMMATION VIEW

Name	Value
DialOut	258342
RPC	3508
Agent Connects	24108
Abandon	11794
Answered	24108
Success Business Outcome	5936
Failed Business Outcome	5898
Success Voice Outcome	12274
Failure Voice Outcome	245841
Success Outcome	18210
Failure Outcome	251739
Personal Callbacks - Registered	33
Regular Callbacks - Registered	11690
Personal Callback - Attempt	80
Regular Callbacks - Attempt	11839
RPC %	1.36

See Table 7–17 for what the **Contact & Attempt** report contains in the **Summation View**.

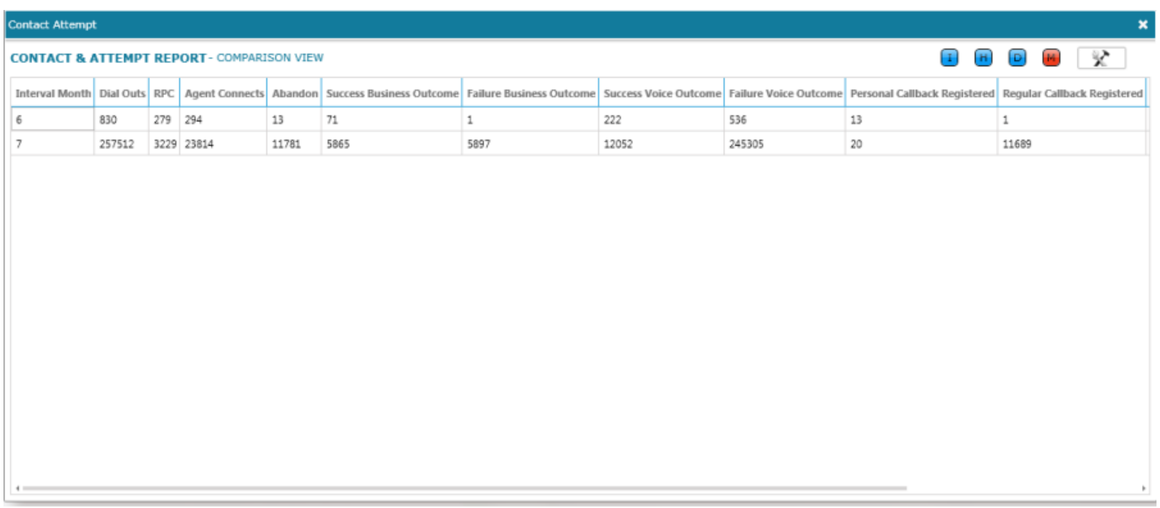
Table 7–17 Contact & Attempt - Summation

Field	Description
DialOut	The number of contacts dialed out.
RPC	The number of RPC contacts.
Agent Connects	The number of dial outs successfully connected to agents from the list of contacts.
Abandon	The number of calls abandoned by either the dialer or the customer.
Answered	The number of calls successfully answered by the customer. (Agent Connects + Abandon)
Success Business Outcome	The number of calls with a successful business outcome.
Failed Business Outcome	The number of calls with a failed business outcome.
Success Voice Outcome	The number of calls with a successful telephony outcome.
Failure Voice Outcome	The number of calls with a failed telephony outcome.
Success Outcome	The total number of calls with successful business and telephony outcomes.
Failure Outcome	The total number of calls with failed business and telephony outcomes.
Personal Callbacks - Registered	The number of personal callback requests registered.

Field	Description
Regular Callbacks - Registered	The number of regular callback requests registered.
Personal Callbacks - Attempt	The number of personal callback requests attempted.
Regular Callbacks - Attempt	The number of regular callback requests attempted.
RPC %	The percentage of RPC contacts from the total dial outs. (RPC/Dial Outs) * 100
Hit Rate %	The percentage of agent connects from the total dial outs. (Agent Connects/Dial Outs) * 100
Abandon %	The percentage of calls abandoned from the total answered calls. (Abandon/Answered) * 100
Answered %	The percentage of answered calls. (Answered/Dial Outs) * 100
Success to RPC %	The percentage of calls with successful outcomes out of the total RPC calls. (Success Outcome/RPC) * 100
Business Success RPC %	The percentage of calls with a successful business outcome from the RPC calls. (Success Business Outcome/RPC) * 100

The **Comparison View** shows the count for each chosen category of outcomes for the specified filter conditions. The **Comparison View** of **Contact & Attempt** report is shown in Figure 7–20.

Figure 7–20Contact & Attempt - Comparison


Contact Attempt

CONTACT & ATTEMPT REPORT - COMPARISON VIEW

Interval Month	Dial Outs	RPC	Agent Connects	Abandon	Success Business Outcome	Failure Business Outcome	Success Voice Outcome	Failure Voice Outcome	Personal Callback Registered	Regular Callback Registered
6	830	279	294	13	71	1	222	536	13	1
7	257512	3229	23814	11781	5865	5897	12052	245305	20	11689

See Table 7–18 for what the **Contact & Attempt** report contains in the **Comparison View**.

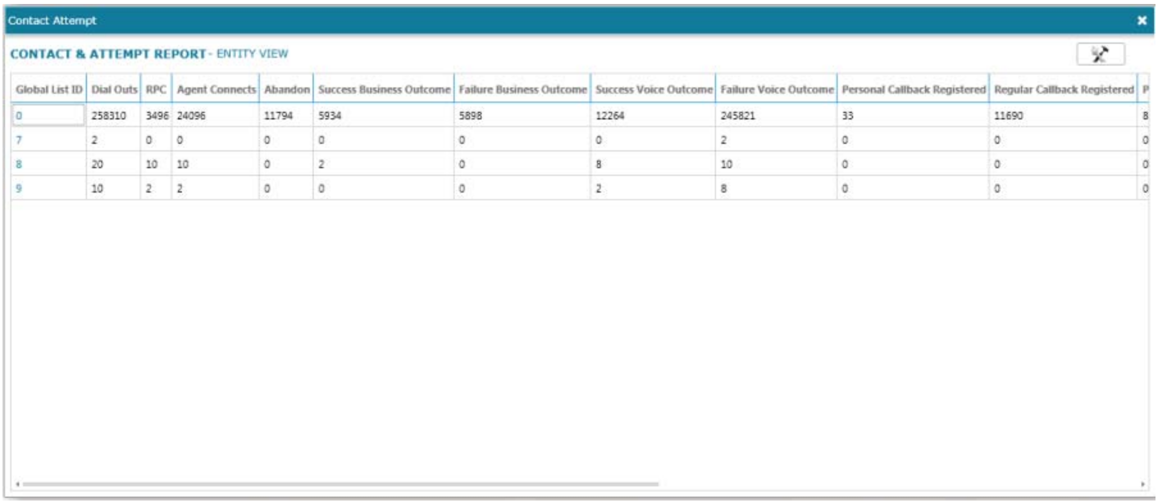
Table 7–18 Contact & Attempt - Comparison

Field	Description
Interval	The interval(s) for which data is rendered on the report.
DialOut	The number of contacts dialed out.
RPC	The number of RPC contacts.
Agent Connects	The number of dial outs successfully connected to agents from the list of contacts.
Abandon	The number of calls abandoned by either the dialer or the customer.
Success Business Outcome	The number of calls with a successful business outcome.
Failed Business Outcome	The number of calls with a failed business outcome.
Success Voice Outcome	The number of calls with a successful telephony outcome.
Failure Voice Outcome	The number of calls with a failed telephony outcome.
Personal Callbacks - Registered	The number of personal callback requests registered.
Regular Callbacks - Registered	The number of regular callback requests registered.
Personal Callbacks - Attempt	The number of personal callback requests attempted.
Regular Callbacks - Attempt	The number of regular callback requests attempted.
Success Outcome	The total number of calls with successful business and telephony outcomes.
Failure Outcome	The total number of calls with failed business and telephony outcomes.
RPC %	The percentage of RPC contacts from the total dial outs. (RPC/Dial Outs) * 100
Hit Rate %	The percentage of agent connects from the total dial outs. (Agent Connects/Dial Outs) * 100
Answered %	The percentage of answered calls. (Answered/Dial Outs) * 100
Success to RPC %	The percentage of calls with successful outcomes out of the total RPC calls. (Success Outcome/RPC) * 100
Business Success RPC %	The percentage of calls with a successful business outcome from the RPC calls. (Success Business Outcome/RPC) * 100

See Report Intervals for viewing data for various intervals.

The **Entity View** shows the count for each chosen category of outcome for each specified filter condition, or entity, separately. The **Entity View** of **Contact & Attempt** report is shown in Figure 7–21.

Figure 7–21Contact & Attempt - Entity



Global List ID	Dial Outs	RPC	Agent Connects	Abandon	Success Business Outcome	Failure Business Outcome	Success Voice Outcome	Failure Voice Outcome	Personal Callback Registered	Regular Callback Registered
0	258310	3496	24096	11794	5934	5898	12264	245821	33	11690
7	2	0	0	0	0	0	0	2	0	0
8	20	10	10	0	2	0	8	10	0	0
9	10	2	2	0	0	0	2	8	0	0

See Table 7–19 for what the **Contact & Attempt** report contains in the **Entity View**.

Table 7–19 Contact & Attempt - Entity

Field	Description
Entity	The entity for which data is rendered on the report.
DialOut	The number of contacts dialed out.
RPC	The number of RPC contacts.
Agent Connects	The number of dial outs successfully connected to agents from the list of contacts.
Abandon	The number of calls abandoned by either the dialer or the customer.
Success Business Outcome	The number of calls with a successful business outcome.
Failed Business Outcome	The number of calls with a failed business outcome.
Success Voice Outcome	The number of calls with a successful telephony outcome.
Failure Voice Outcome	The number of calls with a failed telephony outcome.
Personal Callbacks - Registered	The number of personal callback requests registered.
Regular Callbacks - Registered	The number of regular callback requests registered.

Field	Description
Personal Callbacks - Attempt	The number of personal callback requests attempted.
Regular Callbacks - Attempt	The number of regular callback requests attempted.
Success Outcome	The total number of calls with successful business and telephony outcomes.
Failure Outcome	The total number of calls with failed business and telephony outcomes.
RPC %	The percentage of RPC contacts from the total dial outs. (RPC/Dial Outs) * 100
Hit Rate %	The percentage of agent connects from the total dial outs. (Agent Connects/Dial Outs) * 100
Answered %	The percentage of answered calls. (Answered/Dial Outs) * 100
Success to RPC %	The percentage of calls with successful outcomes out of the total RPC calls. (Success Outcome/RPC) * 100
Business Success RPC %	The percentage of calls with a successful business outcome from the RPC calls. (Success Business Outcome/RPC) * 100

Note: Table 7–19 is illustrative. If more filter conditions are chosen, and also if more categories are available, the report lists the count for each filter condition in a separate row, and each category in a separate column.

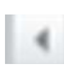
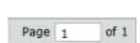
7.2 Historical Reports

Click the **Historical Report** icon in the modules pane on the right to open the **Historical Reports** screen as shown in Figure 7–22.

Figure 7–22Historical Report - Home

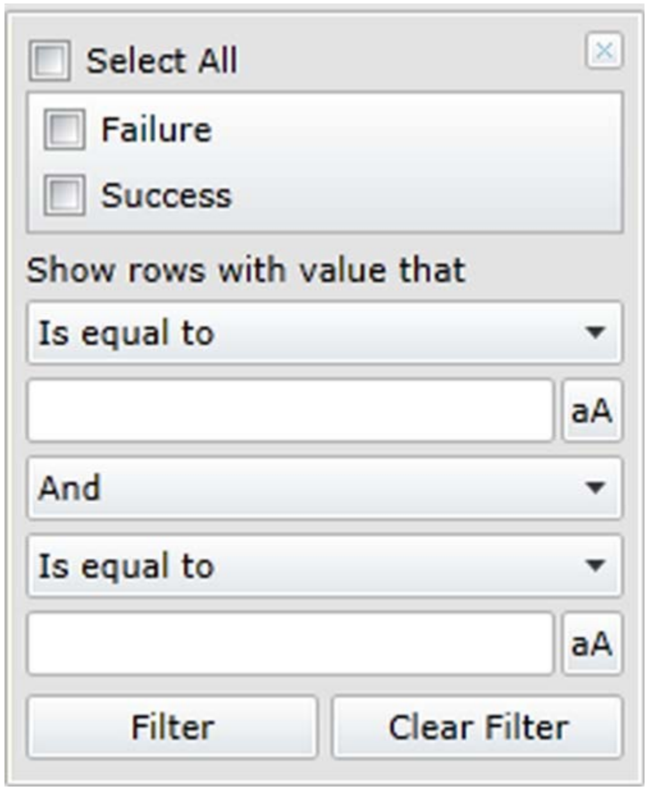
Every historical report, when rendered on the screen, has an icon strip, as shown in Figure 7–23.

Figure 7–23Historical Reports - Navigation Icon Strip

- Click the  icon to see the list of available reports.
- Click the icon to open the **Report Parameter** pop up.
- Click the  icon to save the report in a convenient format. Select the format from the drop-down list. Available options are Excel, Word, CSV, and PDF.
- Click the  icon to refresh report data.
- Click the  icon to navigate to the first page of the report.
- Click the  icon to navigate to the previous page of the report.
- Click the  icon to navigate to the next page of the report.
- Click the  icon to navigate to the last page of the report.
- Enter a page number in the  icon to navigate to a specific page in the report.

After any report is rendered, you can also filter the data in any column to reflect your filter selection. Click the  icon see the filter criteria selection pop up as shown in Figure 7–24.

Figure 7–24Report Filter



Complete the filter criteria by which you want the report filtered. Click the Filter icon to see your filtered report. To clear the filter selection, click the Clear Filter icon.

7.2.1 Campaign Reports

You can generate the following **Campaign Reports**:

- Business Outcome Report
- Call Outcome Report
- Campaign Summary Report
- DNC Blocked Report
- Failed Call Report
- Abandoned Percentage Report
- RPC

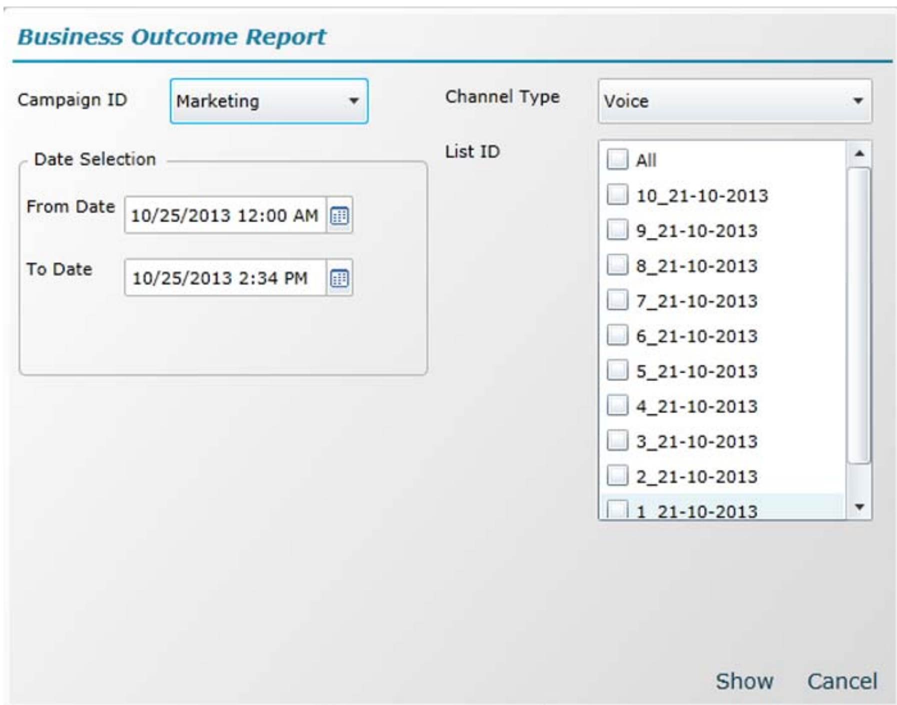
- Campaign Agent Report

7.2.1.1 Business Outcome Report

Business Outcome Report lists the business outcomes for a selected campaign and channel type. This information is for each dialed number with the appropriate call mode.

Click **Business Outcome Report** from the **Campaign Reports** column on the left to pop up the report parameters as shown in Figure 7–25.

Figure 7–25Business Outcome Report - Parameters



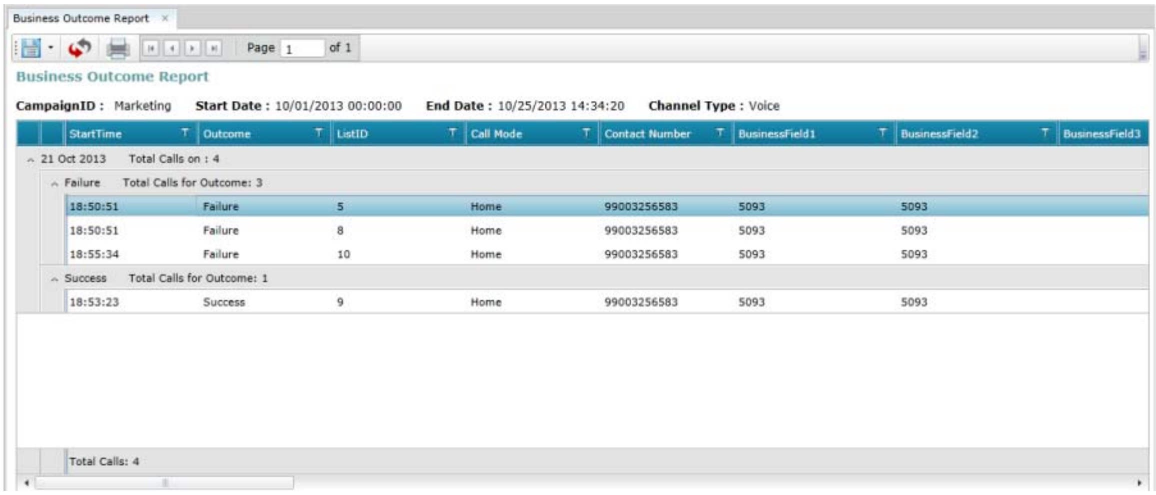
Complete the fields as shown in Table 7–20.

Table 7–20 Report Parameters

Field	Action	Description
Campaign ID	Select from drop-down list.	The campaign ID for which you want a report.
Channel Type	Select from drop-down list.	The channel type for which you want a report.
Date Selection	Select from pop up date panel.	Select a **From Date** and a **To Date** for the report.
List ID	Select checkbox.	The list IDs for which you want this report. Select the **All** checkbox to select all the lists.

Click **Show** to populate the report format as shown in Figure 7–26.

Figure 7–26Business Outcome Report



See Table 7–21 for what the **Business Outcome Report** contains.

Table 7–21 Business Outcome Report – Field Details

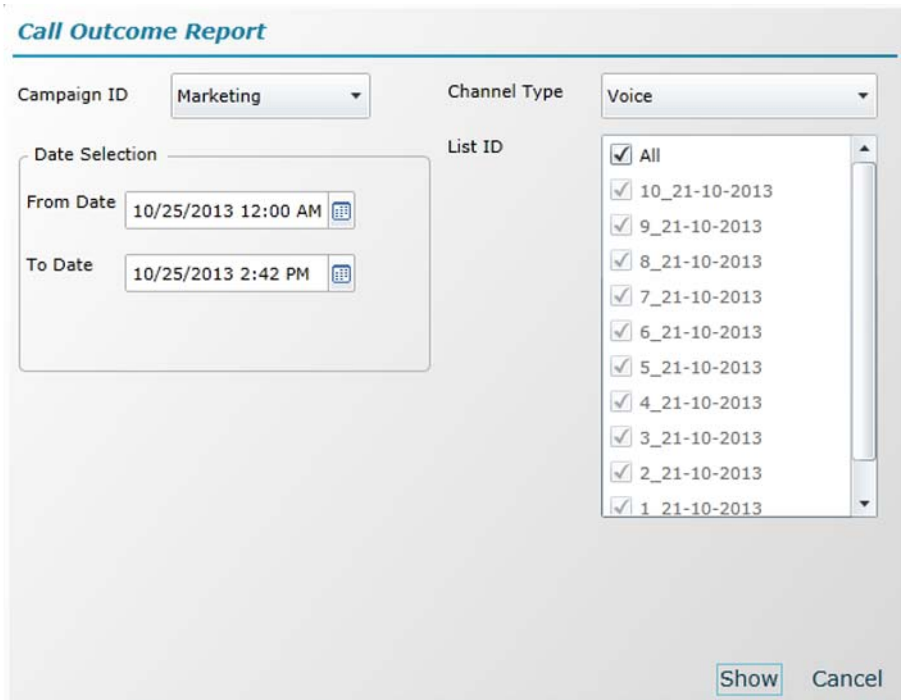
Field	Description
Start Time	The call start time.
Outcome	The business outcome for this call.
List ID	The list ID to which this call pertains.
Call Mode	The mode on which this call is made.
Contact Number	The number to which this call is made.
Business Fields	The business fields configured at the time of campaign creation. **Note:** This report contains one column for each business field configured.

7.2.1.2 Call Outcome Report

Call Outcome Report lists the telephony outcomes for a selected campaign and channel type. This information is for each dialed number with the appropriate call mode.

Click **Call Outcome Report** from the **Campaign Reports** column on the left to pop up the report parameters as shown in Figure 7–27.

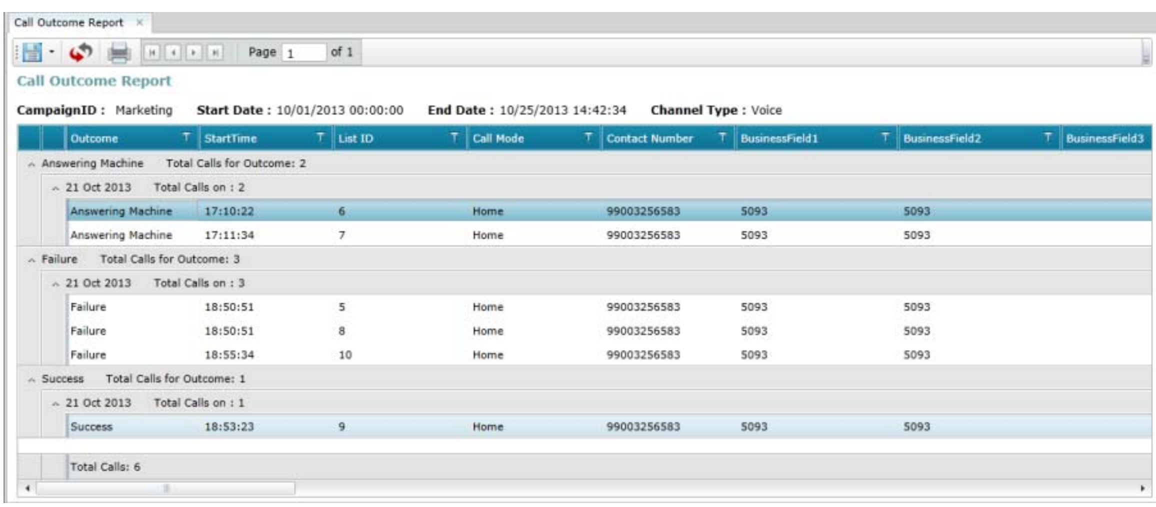
Figure 7–27Call Outcome Report - Parameters



Complete the fields as shown in Table 7–20.

Click **Show** to populate the report as shown in Figure 7–28.

Figure 7–28Call Outcome Report



See Table 7–22 for what the **Call Outcome Report** contains.

Table 7–22 Call Outcome Report – Field Details

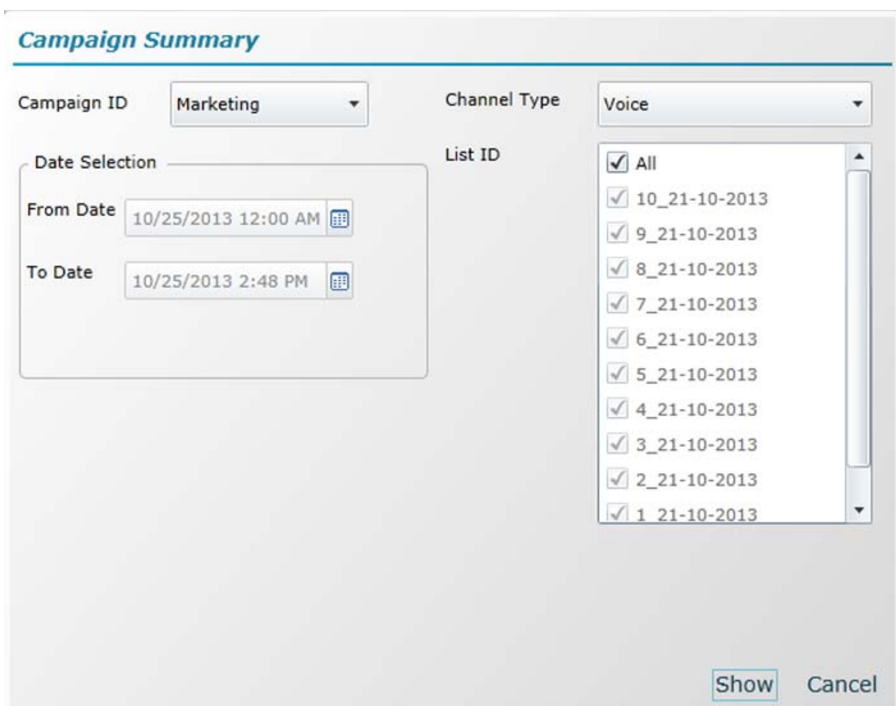
Field	Description
Outcome	The telephony outcome for this call.
StartTime	The start time for this call
List ID	The list ID from which the contact was uploaded.
Call Mode	The mode on which the call is made.
Contact Number	The number to which this call is made.
Business Fields	The business fields configured at the time of campaign creation. **Note:** This report contains one column for each business field configured.

7.2.1.3 Campaign Summary

Campaign Summary provides a snapshot or an overview of a campaign.

Click **Campaign Summary** from the **Campaign Reports** column on the left to pop up the report parameters as shown in Figure 7–29.

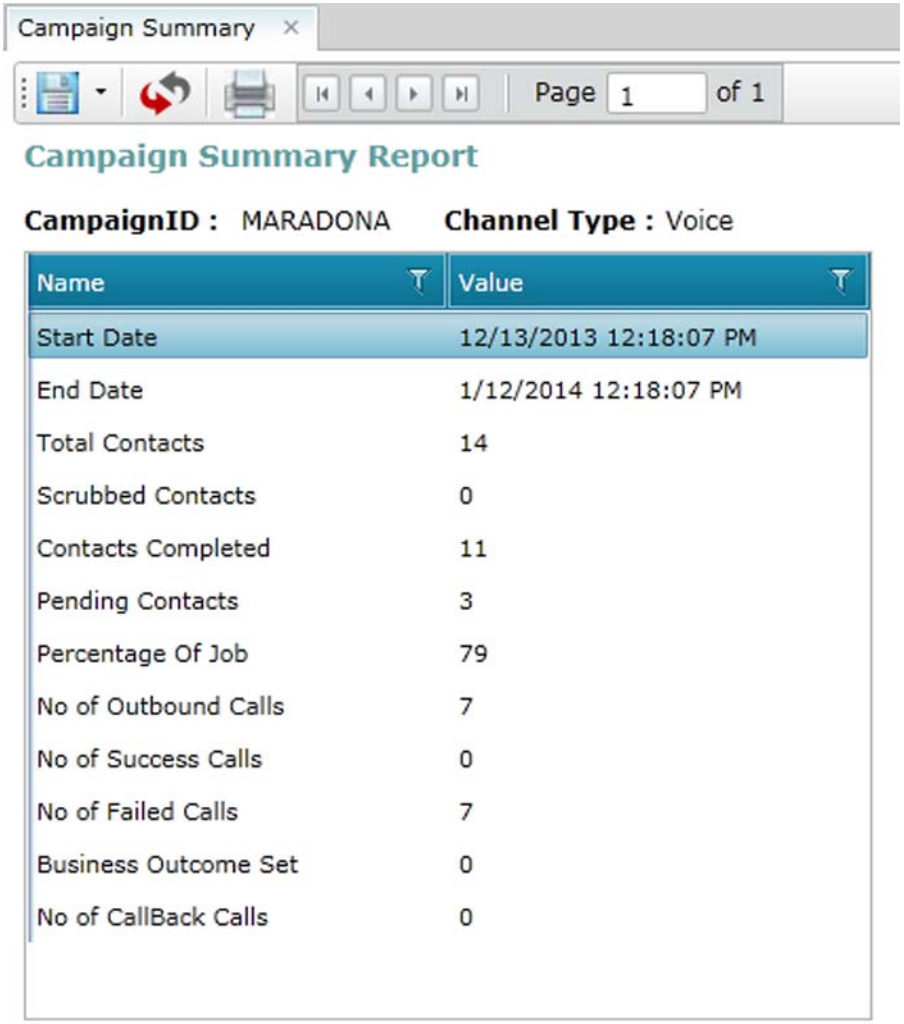
Figure 7–29Campaign Summary Report - Parameters



Complete the fields as shown in Table 7–20. Since this is a summary report, the **From Date** and **To Date** fields are disabled.

Click **Show** to populate the report as shown in Figure 7–30.

Figure 7–30Campaign Summary Report



See Table 7–23 for what the **Campaign Summary Report** contains.

Table 7–23 Campaign Summary Report – Field Details

Field	Description
Start Date	The start date for the campaign.
End Date	The end date for the campaign.
Total Contacts	The total number of contacts uploaded for this campaign.
Scrubbed Contacts	The total number contacts scrubbed for this campaign.
Contacts Completed	The number of contacts in this campaign that are dialed.
Pending Contacts	The number of pending contacts in this campaign.
Percentage of Job	The percentage of calls dialed out of the contacts uploaded.

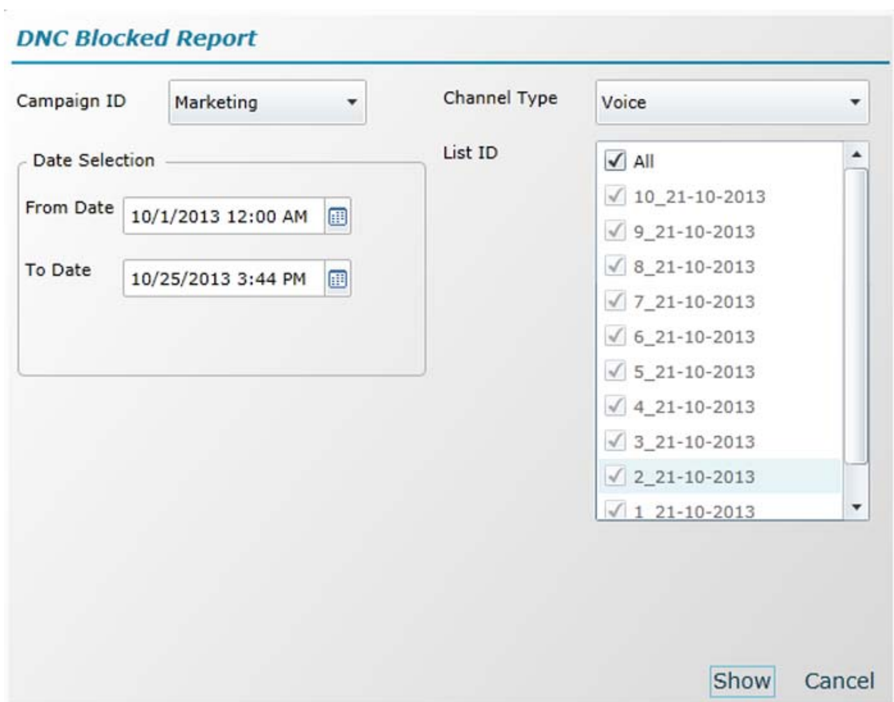
Field	Description
No of Outbound Calls	The number of outbound calls made in this campaign.
No of Success Calls	The number of calls that have a successful telephony outcome.
No of Failed Calls	The number of calls that have a failed telephony outcome.
Business Outcome Set	The number of calls for which agents have set business outcomes.
No of CallBack Calls	The number of callback calls made in this campaign.

7.2.1.4 DNC Blocked Report

DNC Blocked Report lists the contact numbers and the dialed mode for contacts that have been blocked from dialing due to DNC restriction.

Click **DNC Blocked Report** from the **Campaign Reports** column on the left to pop up the report parameters as shown in Figure 7–31.

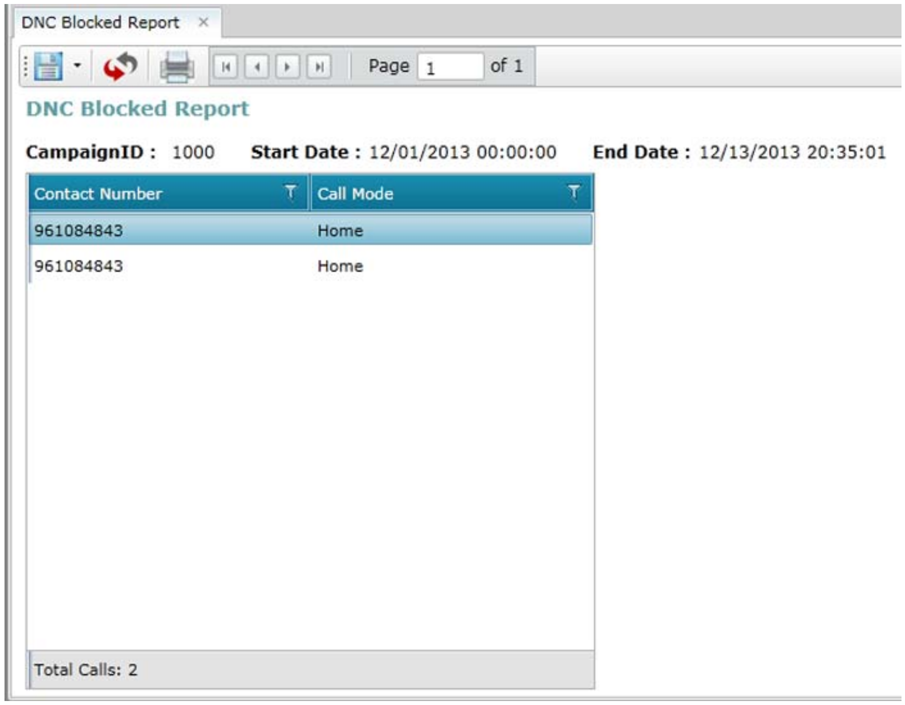
Figure 7–31DNC Blocked Report - Parameters



Complete the fields as shown in Table 7–20.

Click **Show** to populate the report as shown in Figure 7–32.

Figure 7–32DNC Blocked Report



See Table 7–24 for what the **DNC Blocked Report** contains.

Table 7–24 DNC Blocked Report – Field Details

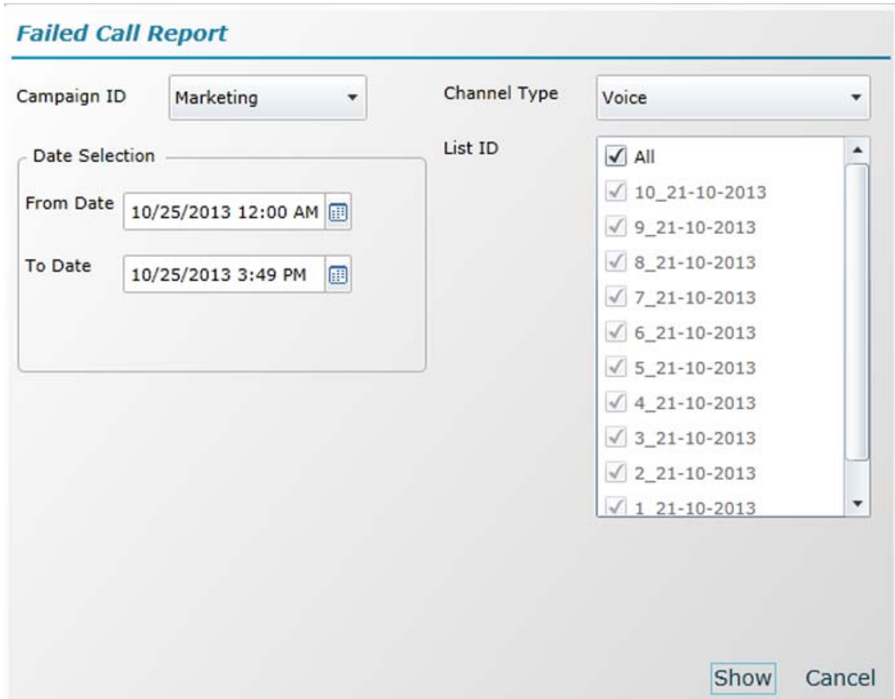
Field	Description
Contact Number	The number to which the call is made.
Dialed Mode	The mode in which the call is made.

7.2.1.5 Failed Call Report

Failed Call Report lists the dialed numbers and the dialed mode for failed contacts.

Click **Failed Call Report** from the **Campaign Reports** column on the left to pop up the report parameters as shown in Figure 7–33.

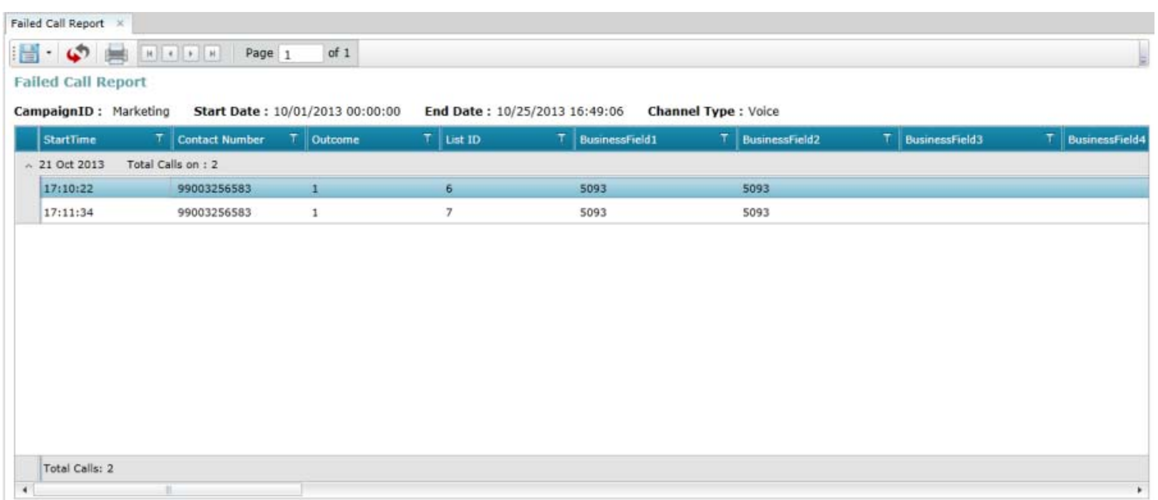
Figure 7–33Failed Call Report - Parameters



Complete the fields as shown in Table 7–20.

Click **Show** to populate the report as shown in Figure 7–34.

Figure 7–34Failed Call Report



See Table 7–25 for what the **Failed Call Report** contains.

Table 7–25 Failed Call Report – Field Details

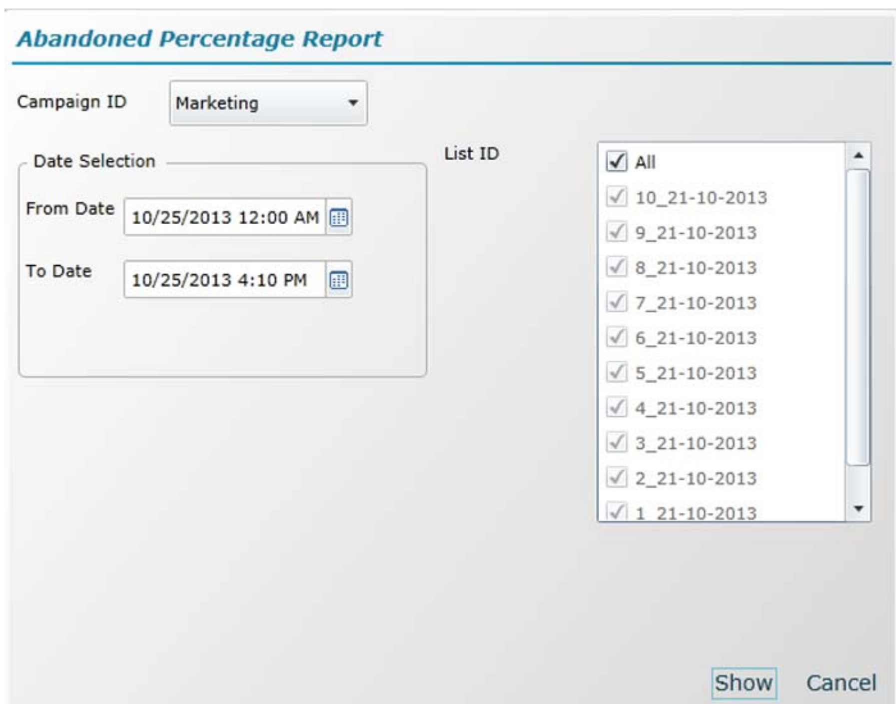
Field	Description
Start Time	The start time for this call.
Contact Number	The number to which the call is made.
Outcome	The telephony outcome for this call.
List ID	The list from which this contact was uploaded.
Business Field	The business fields configured at the time of campaign creation. **Note:** This report contains one column for each business field configured.

7.2.1.6 Abandoned Percentage Report

Abandoned Percentage Report contains the percentage of calls abandoned for a selected campaign.

Click **Abandoned Percentage Report** from the **Campaign Reports** column on the left to pop up the report parameters as shown in Figure 7–35.

Figure 7–35Abandoned Percentage Report - Parameters



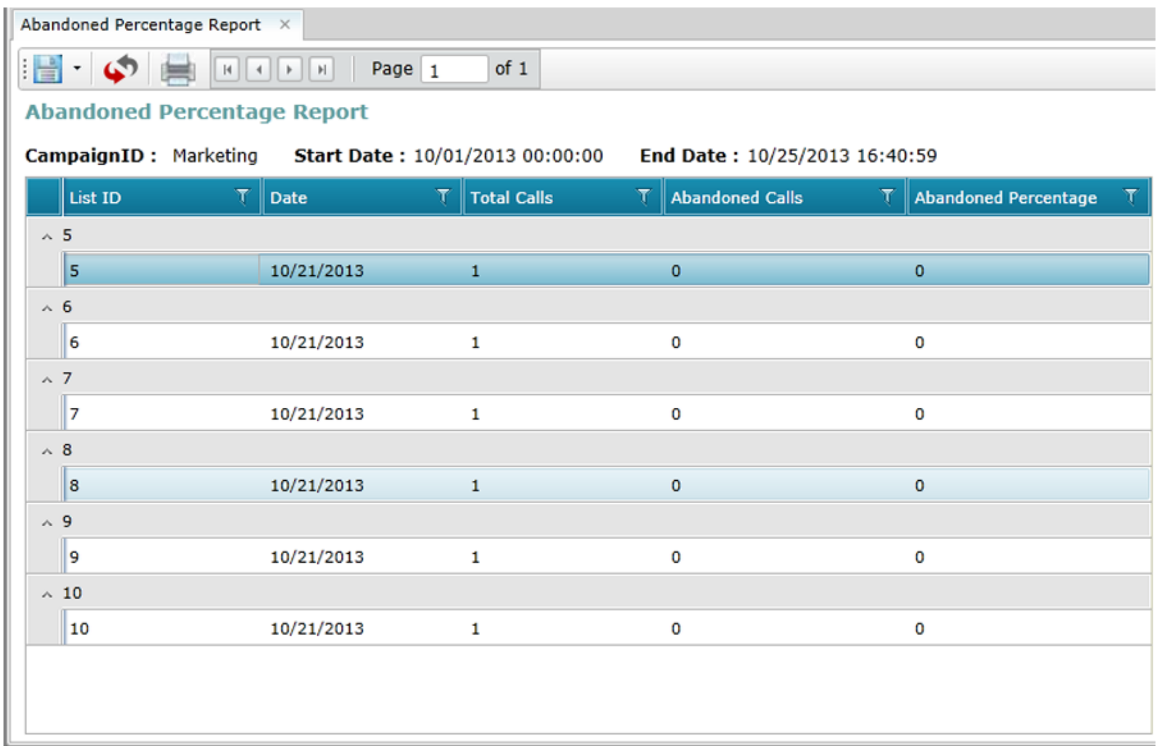
Complete the fields as shown in Table 7–26.

Table 7–26 Abandoned Percentage Report -

Field	Action	Description
Campaign ID	Select from drop-down list.	The campaign ID for which you want a report.
Date Selection	Select from pop up date panel.	Select a From Date and a To Date for the report.
List ID	Select checkbox.	The list IDs for which you want this report. Select the **All** checkbox to select all the lists.

Click **Show** to populate the report as shown in Figure 7–36.

Figure 7–36Abandoned Percentage Report



See Table 7–27 for what the **Abandoned Percentage Report** contains.

Table 7–27 Abandoned Percentage Report – Field Details

Field	Description
List ID	The list ID from which this call was made.
Date	The date on which the call was made.
Total Calls	The total calls made from this list.

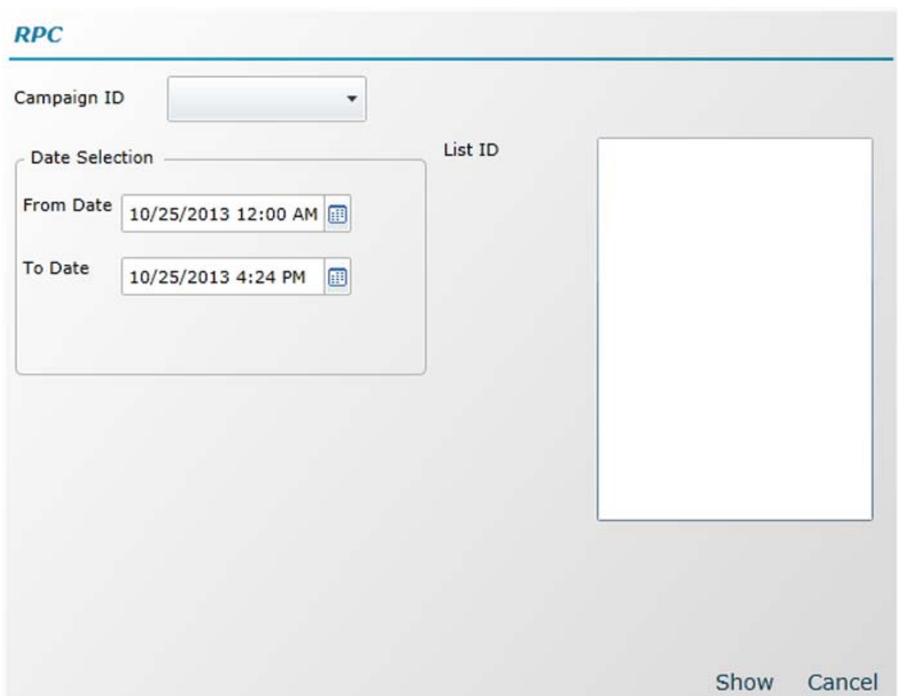
Field	Description
Abandoned Calls	The number of calls abandoned from this list.
Abandoned Percentage	The percentage of calls abandoned from the total calls made from this list.

7.2.1.7 RPC

RPC report lists the right party connect (RPC) details. RPC indicates that the calls dialed by the campaign are answered by the intended contacts.

Click **RPC** from the **Campaign Reports** column on the left to pop up the report parameters as shown in Figure 7–37.

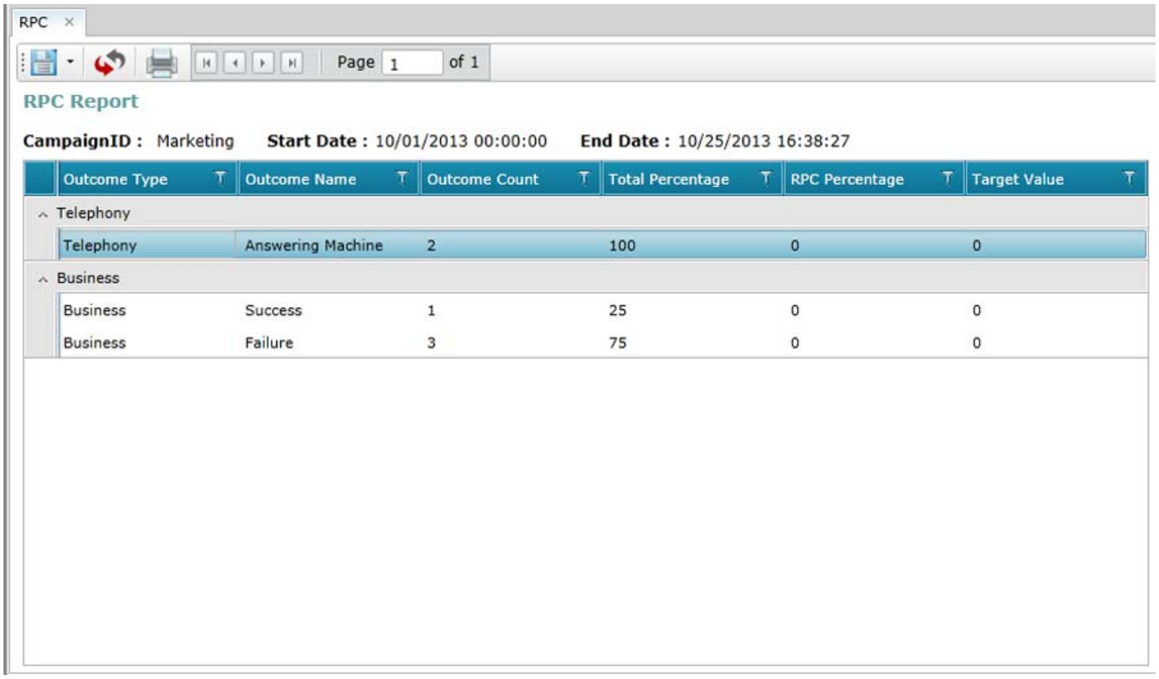
Figure 7–37RPC - Parameters



Complete the fields as shown in Table 7–26.

Click **Show** to populate the report as shown in Figure 7–38.

Figure 7–38RPC Report



See Table 7–28 for what **RPC** contains.

Table 7–28 RPC – Field Details

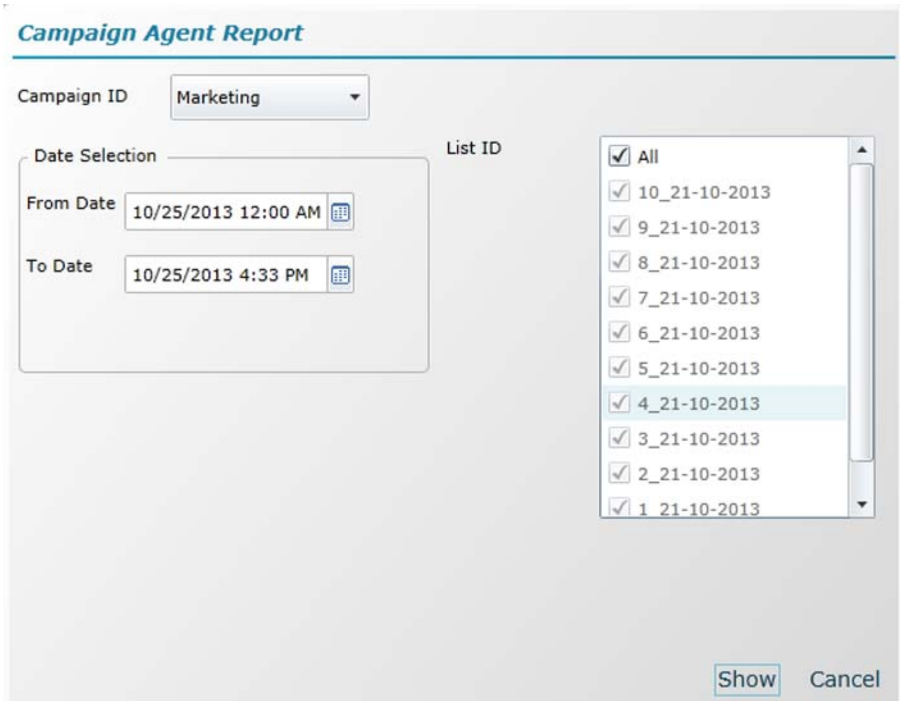
Field	Description
Outcome Type	The outcome type for this call - telephony or business outcome.
Outcome Name	The outcome for this call.
Outcome Count	The outcome count for this call.
Total Percent	The percentage of calls for this outcome.
RPC Percent	The percentage of calls that are right party connect (RPC).
Target Value	The target fixed for each outcome.

7.2.1.8 Campaign Agent Report

Campaign Agent Report lists the count for each outcome type for each agent for the selected campaign.

Click **Campaign Agent Report** in the right pane to pop up the report parameters as shown in Figure 7–39.

Figure 7–39Campaign Agent Report - Parameters



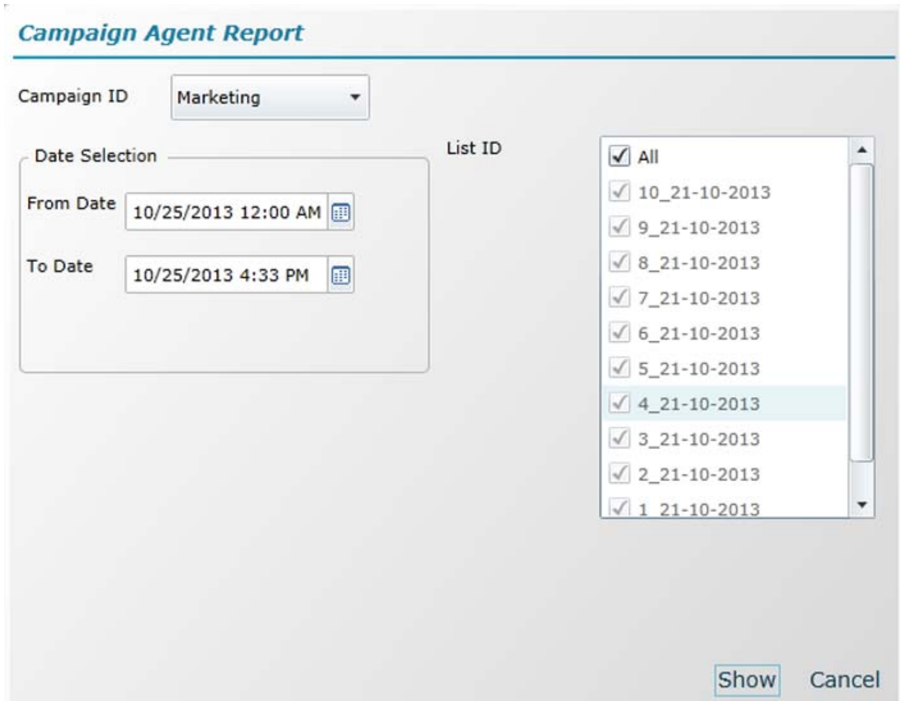
Complete the fields as shown in Table 7–29.

Table 7–29 Campaign Agent Report - Parameters

Field	Action	Description
Campaign ID	Select from drop-down list.	The campaign ID for which you want a report.
List ID	Select from drop-down list.	The list IDs for which you want a report. Select the **All** checkbox to select all lists.
Date Selection	Select from pop up date panel.	Select a From Date and a To Date for the report.

Click **Show** to populate the report as shown in Figure 7–40.

Figure 7–40Campaign Agent Report



See Table 7–30 for what the **Campaign Agent Report** contains.

Table 7–30 Campaign Agent Report – Field Details

Field	Description
Agent Peripheral Number	The agent extension number.
Outcome Type	The outcome type.
Description	The outcome description.
Count	The count for this outcome type.

7.2.2 Summary Reports

You can generate the following **Summary Reports**:

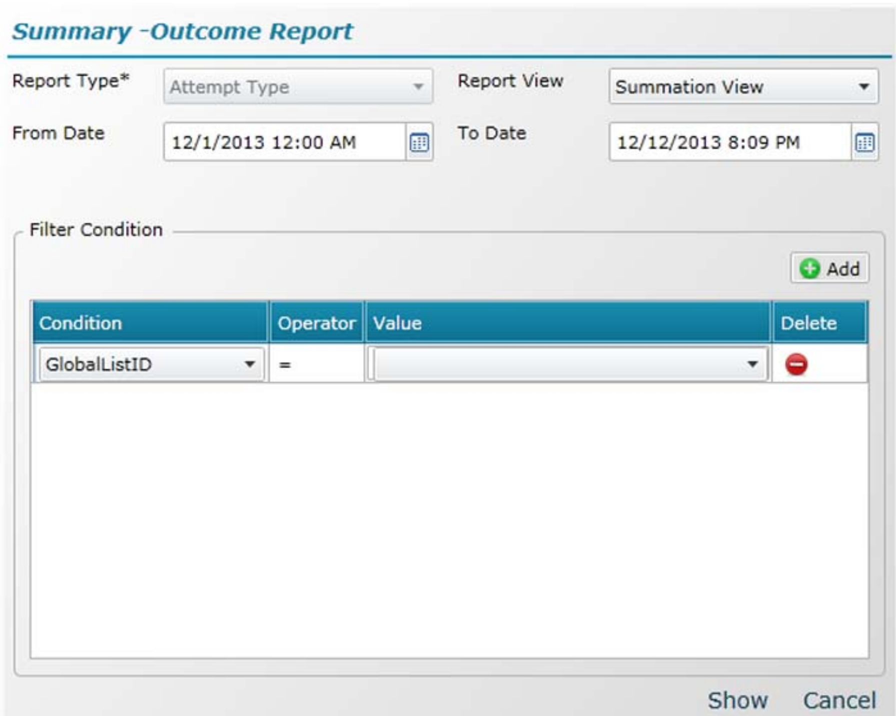
- Outcome Report
- Category Report
- Category Target Report
- Contact Report
- Contact Attempt Bucket Report
- Agent Attempt Report
- Agent Outcome Report

7.2.2.1 Summary Outcome Report

Summary Outcome Report lists the outcomes for selected criteria. This information is for each dialed number with the appropriate call mode.

Click **Outcome Report** in the right pane to pop up the report parameters as shown in Figure 7–41.

Figure 7–41Outcome Report - Parameters



Complete the fields as shown in Table 7–31.

Table 7–31 Outcome Report - Parameters

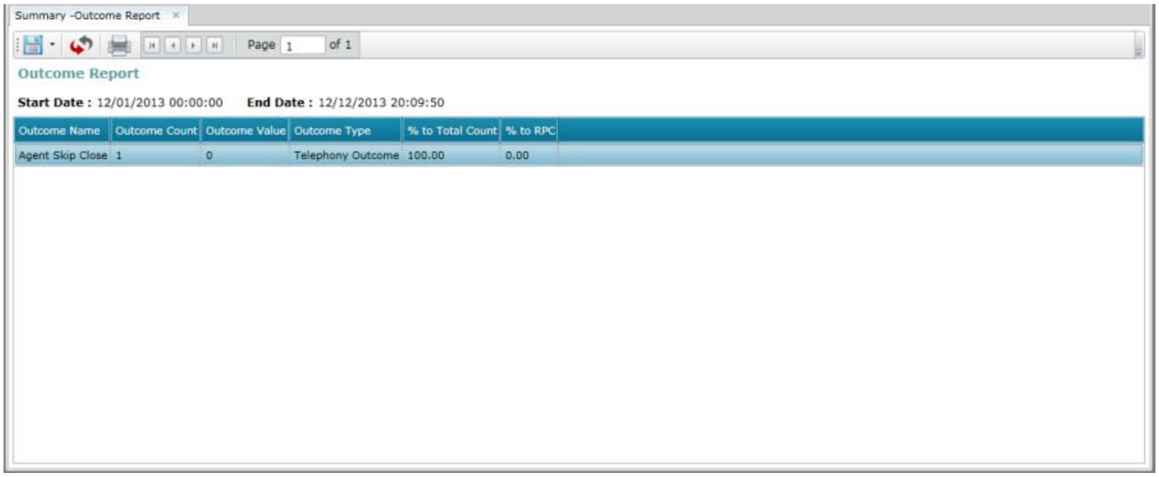
Field	Action	Description
Report Type	Select from drop-down list.	The report type that you want.
Report View	Select from drop-down list.	The report view that you want to see.
From Date	Select from pop up date panel.	Select a **From Date** for the report.
To Date	Select from pop up date panel.	Select a **To Date** for the report.

Complete the Filter Conditions.

Click **Show** to see the **Summation View** of the report as shown in Figure 7–42.

Click Report Intervals to see the report for various intervals.

Figure 7–42Outcome Report - Summation



See Table 7–32 for what the **Outcome Report** contains in the **Summation View**.

Table 7–32 Outcome Report – Summation

Field	Description
Outcome Name	The outcome name as configured.
Outcome Count	The count of calls that have this outcome.
Outcome Value	The value for this outcome.
Outcome Type	The outcome type for this outcome - Telephony or Business.
% to Total Count	The percentage of this outcome to the total calls.
% to RPC	The percentage of this outcome to the total RPC (right party connect) calls.

To see a **Comparison View**, as shown in Figure 7–43, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–43Outcome Report - Comparison

See Table 7–33 for what the **Outcome Report** contains in the **Comparison View**.

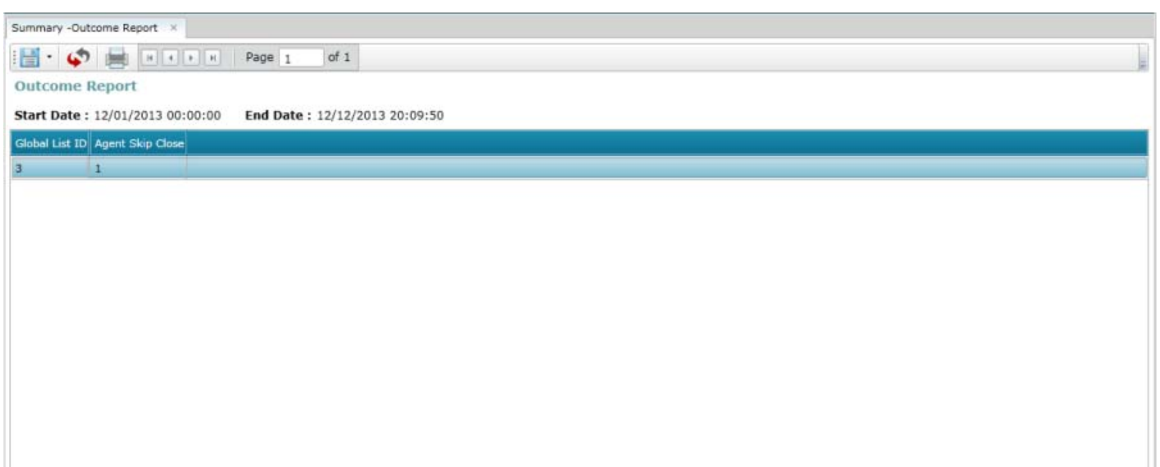
Table 7–33 Outcome Report – Comparison

Field	Description
Interval	The quarter-hourly interval for which the result is shown.
Outcome Name	The count of calls for each configured outcome at one outcome per column. Shown above are **Answering Machine** and **Success** outcomes.

To see an **Entity View**, as shown in Figure 7–44, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–44Outcome Report - Entity



See Table 7–34 for what the **Outcome Report** contains in the **Entity View**.

Table 7–34 Outcome Report - Entity

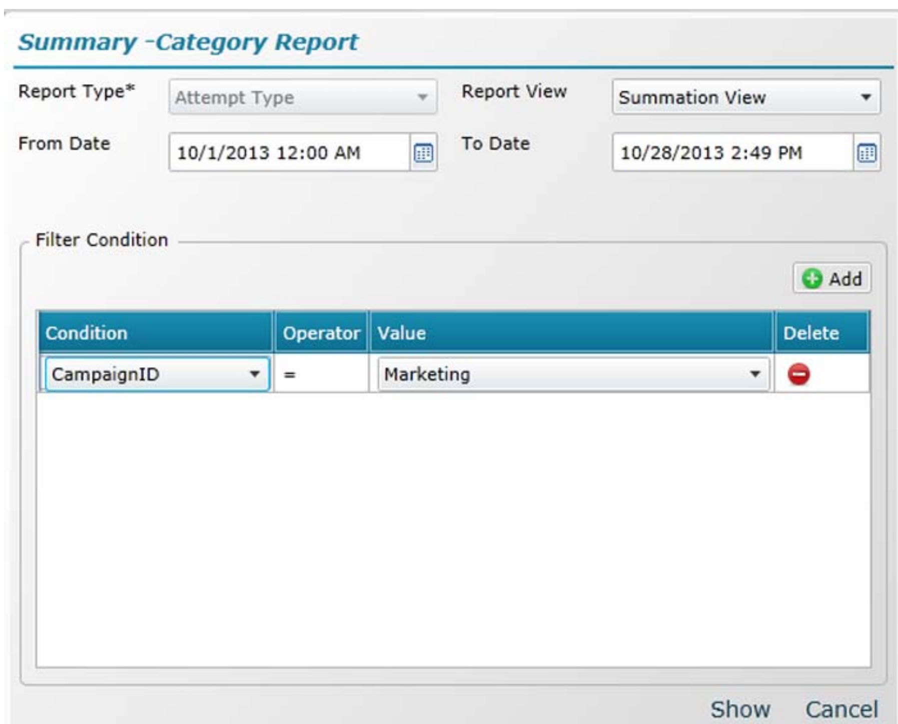
Field	Description
Campaign ID	The campaign ID for which outcomes are listed.
Outcome Name	The count of calls for each configured outcome at one outcome per column. Shown above are **Answering Machine**, **Success**, and **Failure** outcomes.

7.2.2.2 Summary Category Report

Summary Category Report lists the category of outcomes for selected campaigns.

Click **Category Report** in the right pane to pop up the report parameters as shown in Figure 7–45.

Figure 7–45Category Report - Parameters



Complete the fields as shown in Table 7–35.

Table 7–35 Category Report - Parameters

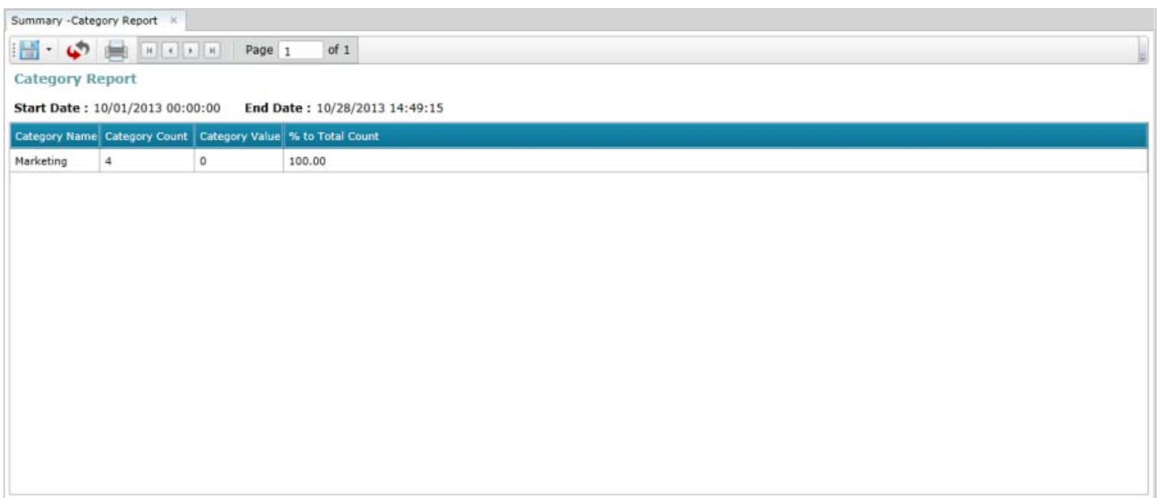
Field	Action	Description
Report Type	Select from drop-down list.	The report type that you want.
Report View	Select from drop-down list.	The report view that you want to see.
From Date	Select from pop up date panel.	Select a **From Date** for the report.
To Date	Select from pop up date panel.	Select a **To Date** for the report.

Complete the Filter Conditions.

Click **Show** to see the **Summation View** of the report as shown in Figure 7–46.

Click Report Intervals to see the report for various intervals.

Figure 7–46Category Report - Summation



See Table 7–36 for what the **Category Report** contains in the **Summation View**.

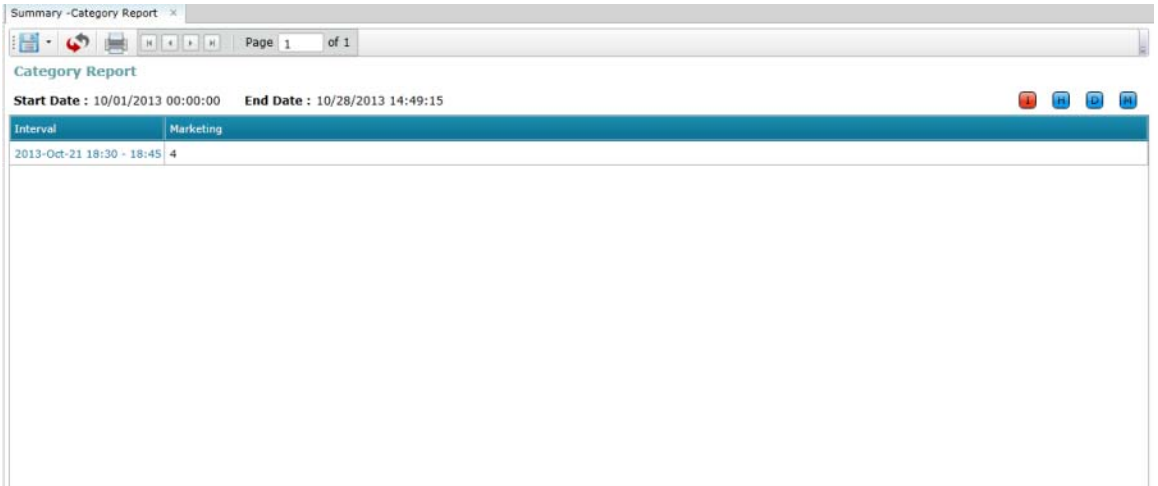
Table 7–36 Category Report – Summation

Field	Description
Category Name	The name of category of outcomes as configured.
Category Count	The count of calls that have this category of outcome.
Category Value	The value for this category of outcomes.
% to Total Count	The percentage of this category of outcomes to the total categories.

To see a **Comparison View**, as shown in Figure 7–47, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–47Category Report - Comparison



See Table 7–37 for what the **Category Report** contains in the **Comparison View**.

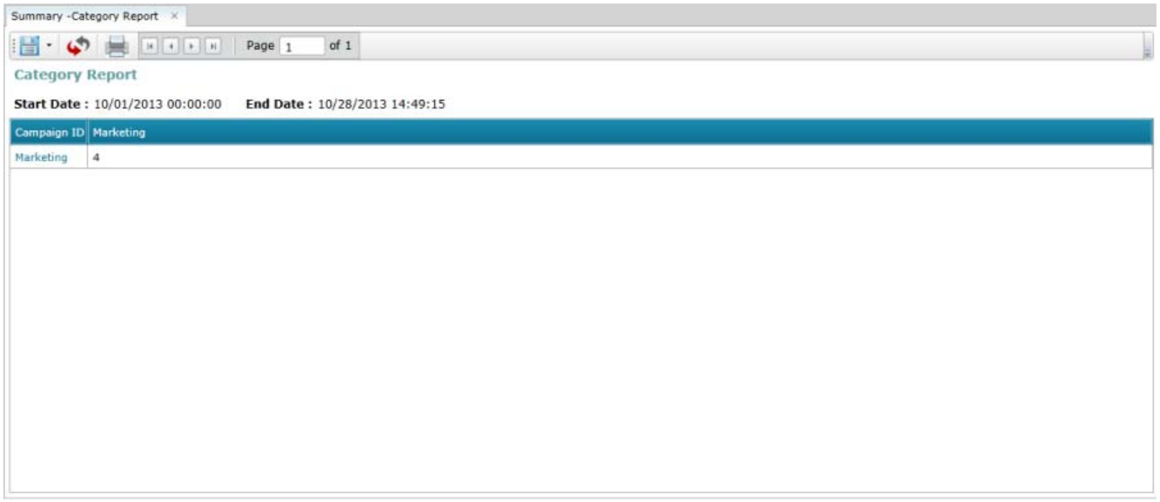
Table 7–37 Category Report – Comparison

Field	Description
Interval	The quarter-hourly interval for which the result is shown.
Category Name	The count of calls for each configured category of outcomes at one category per column. Shown above is the set of outcomes categorized as **Marketing**.

To see an **Entity View**, as shown in Figure 7–48, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–48Category Report - Entity



See Table 7–38 for what the **Category Report** contains in the **Entity View**.

Table 7–38 Category Report - Entity

Field	Description
Campaign ID	The campaign ID for which category of outcomes are listed.
Outcome Name	The count of calls for each configured category of outcome at one category per column. Shown above is the set of outcomes categorized as **Marketing**.

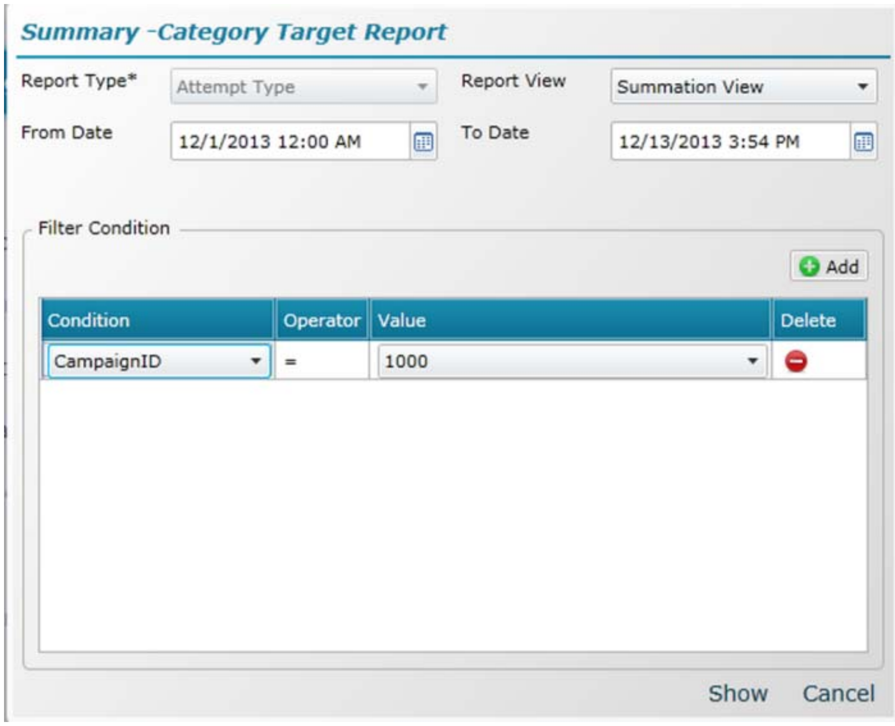
Click Report Intervals to see the report for various intervals.

7.2.2.3 Summary Category Target Report

Summary Category Target Report lists the category of outcomes and the completed targets for categories for selected campaigns for a specific channel type.

Click **Category Target Report** in the right pane to pop up the report parameters as shown in Figure 7–49.

Figure 7–49Category Target Report - Parameters



Complete the fields as shown in Table 7–39.

Table 7–39 Category Target Report - Parameters

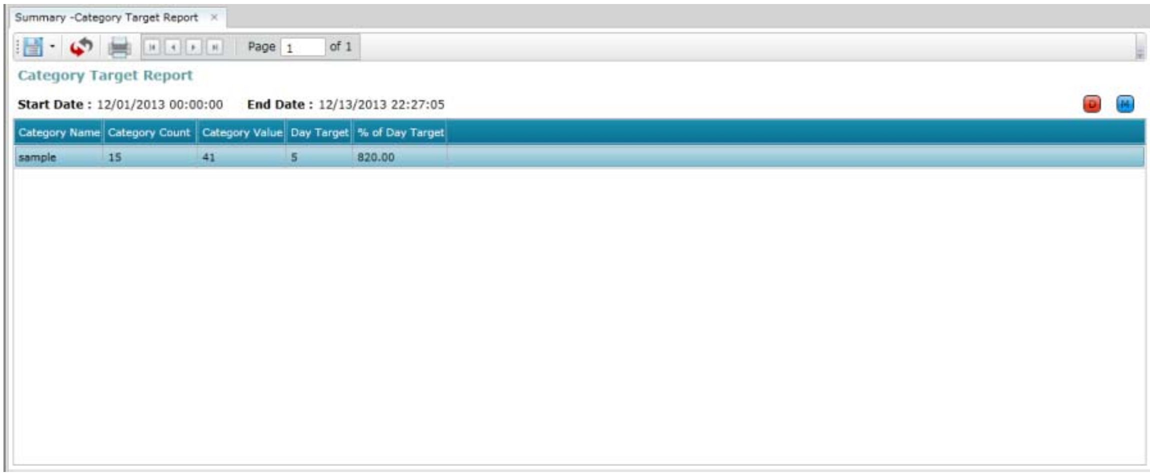
Field	Action	Description
Report Type	Select from drop-down list.	The report type that you want.
Report View	Select from drop-down list.	The report view that you want to see.
From Date	Select from pop up date panel.	Select a **From Date** for the report.
To Date	Select from pop up date panel.	Select a **To Date** for the report.

Complete the Filter Conditions.

Click **Show** to see the **Summation View** of the report as shown in Figure 7–50.

Click Report Intervals to see the report for various intervals.

Figure 7–50Category Target Report - Summation



See Table 7–40 for what the **Category Target Report** contains in the **Summation View**.

Table 7–40 Category Target Report – Summation

Field	Description
Category Name	The name of category of outcomes as configured.
Category Count	The count of calls that have this category of outcome.
Category Value	The value for this category of outcomes.
(Day/Month) Target	The target set for the date range (Day/Month)
% of (Day/Month) Target	The percentage of target achieved.

To see a **Comparison View**, as shown in Figure 7–51, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–51Category Target Report - Comparison

See Table 7–41 for what the **Category Target Report** contains in the **Comparison View**.

Table 7–41 Category Target Report – Comparison

Field	Description
Interval	The quarter-hourly interval for which the result is shown.
Category Name	The count of calls for each configured category of outcomes at one category per column. Shown above is the set of outcomes categorized as **Marketing**.

The **Category Target Report** is not rendered in an Entity View.

7.2.2.4 Summary Contact Report

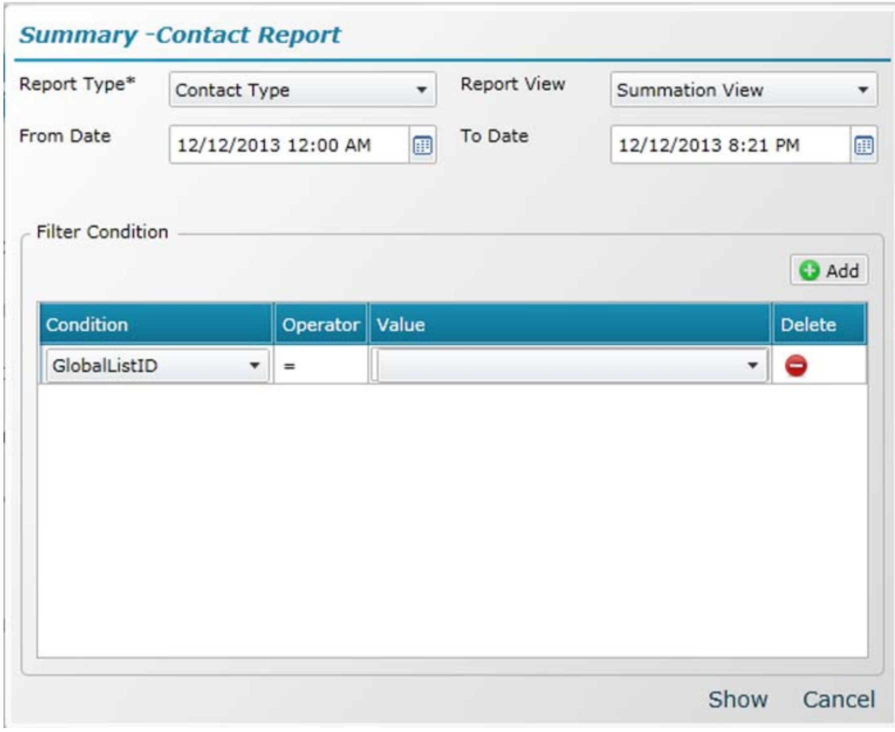
Summary Contact Report can be viewed in two types:

- **Contact**, showing a summary of outcomes by contacts for the selected report parameters and filter conditions.
- **Attempt**, showing a summary of outcomes by dialing attempts for the selected report parameters and filter conditions.

Contact Type

Click **Contact Report** in the right pane to pop up the report parameters as shown in Figure 7–52.

Figure 7–52Contact Report - Parameters



Complete the fields as shown in Table 7–42.

Table 7–42 Contact Report - Parameters

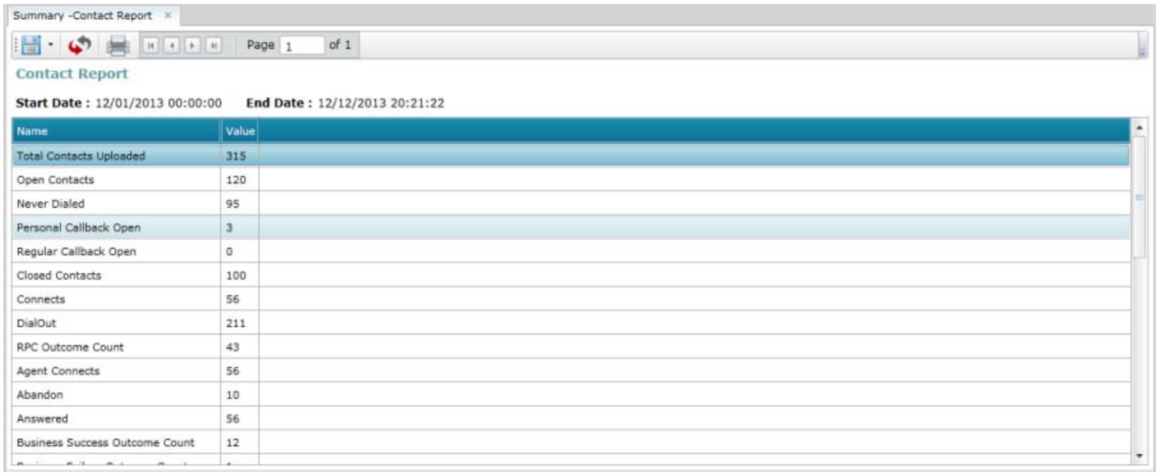
Field	Action	Description
Report Type	Select from drop-down list.	The report type that you want.
Report View	Select from drop-down list.	The report view that you want to see.
From Date	Select from pop up date panel.	Select a **From Date** for the report.
To Date	Select from pop up date panel.	Select a **To Date** for the report.

Complete the Filter Conditions.

Click **Show** to see the **Summation View (Contact Type)** of the report as shown in Figure 7–53.

Click Report Intervals to see the report for various intervals.

Figure 7–53Contact Report - Summation (Contact Type)



See Table 7–43 for what the **Contact Report** contains in the **Summation View (Contact Type)**.

Table 7–43 Contact Report – Summation (Contact Type)

Field (Name)	Description
Total Contacts Uploaded	The total contacts uploaded for the selected filter criteria.
Open Contacts	The count of contacts still open from the total contacts.
Never Dialed	The count of contacts that have never been dialed from the total contacts.
Personal Callback Open	The count of personal callbacks open from the total contacts.
Regular Callback Open	The count of regular callbacks open from the total contacts.
Closed Contacts	The count of closed contacts from the total contacts.
Connects	The count of contacts dialed at least once from the total contacts.
Dial Out	The count of dial outs from the total contacts.
RPC Outcome Count	The count of contacts marked RPC (right party connect) type of outcome.
Agent Connects	The count of contacts correctly connected to agents from the total contacts.
Abandon	The count of contacts abandoned by the customer or the dialer from the total contacts.
Answered	The count of dial outs successfully answered by customer. (Agent Connects + Abandon)
Business Success Outcome Count	All attempts with outcomes marked with **Success Business Outcome** type from the total contacts.

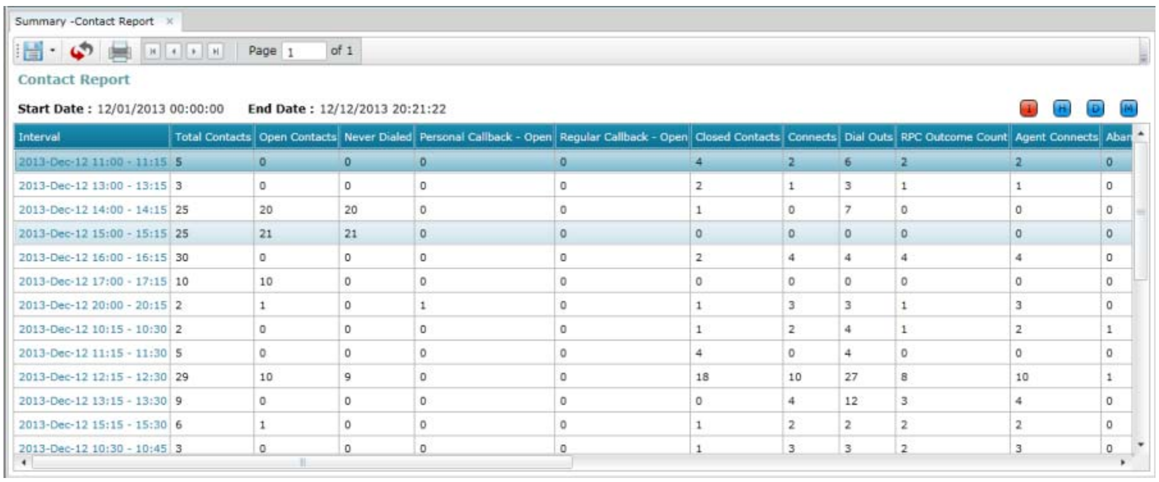
Field (Name)	Description
Business Failure Outcome Count	All attempts with outcomes marked with **Failure Business Outcome** type from the total contacts.
Voice Success Outcome Count	All attempts with outcomes marked with **Success Voice Outcome** type from the total contacts.
Voice Failure Outcome Count	All attempts with outcomes marked with **Failure Voice Outcome** type from the total contacts.
Success Outcome	The total count of success outcomes. Success Business Outcome + Success Voice Outcome
Failure Outcome	The total count of failure outcomes. Failure Business Outcome + Failure Voice Outcome
Personal Callback Close	The count of personal callbacks closed from the total contacts.
Regular Callback Close	The count of regular callbacks closed from the total contacts.
Churn %	The percentage of contacts churned out of the total contacts. ((Contacts-Never Dialed)/Contacts) * 100
Complete %	The percentage of contacts closed out of the total contacts. (Closed Contacts/Contacts) * 100
RPC %	The percentage of RPC out of the total contacts. (RPC/Dial Outs) * 100
Hit Rate %	The percentage of agent connects out of the total dial outs. (Agent Connects/Dial Outs) * 100
Abandon %	The percentage of abandoned calls out of answered calls. (Abandon/Answered) * 100
Answered %	The percentage of answered calls out of the total dial outs. (Answered/Dial Outs) * 100
Success %	The percentage of contact with success outcome out of the total contacts. (Success Outcome/Contacts) * 100
Business Success %	The percentage of contact with a successful business outcome out of the total contacts. (Success Business Outcome/Contacts) * 100
Business Success RPC %	The percentage of contact with a successful business outcome out of the total RPC contacts. (Success Business Outcome/RPC) * 100
Average Dial Out per RPC Contact	The average dial outs taken for each RPC contact. Dial Outs/RPC
Average Dial Out per Closed Contact	The average dial outs taken for each RPC contact. Dial Outs/Closed Contacts

Field (Name)	Description
Average Dial Out per Contact	The average dial outs taken for each RPC contact. Dial Outs/Contacts
Average Dial Out per Success Contact	The average dial outs taken for each RPC contact. Dial Outs/Success Outcome
Average Dial Out per Business Success Contact	The average dial outs taken for each RPC contact. Dial Outs/Business Success Outcome

To see a **Comparison View (Contact Type)**, as shown in Figure 7–54, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–54Contact Report - Comparison (Contact Type)


Summary -Contact Report

Page 1 of 1

Contact Report

Start Date : 12/01/2013 00:00:00 **End Date :** 12/12/2013 20:21:22

Interval	Total Contacts	Open Contacts	Never Dialed	Personal Callback - Open	Regular Callback - Open	Closed Contacts	Connects	Dial Outs	RPC Outcome Count	Agent Connects	Aban
2013-Dec-12 11:00 - 11:15	5	0	0	0	0	4	2	6	2	2	0
2013-Dec-12 13:00 - 13:15	3	0	0	0	0	2	1	3	1	1	0
2013-Dec-12 14:00 - 14:15	25	20	20	0	0	1	0	7	0	0	0
2013-Dec-12 15:00 - 15:15	25	21	21	0	0	0	0	0	0	0	0
2013-Dec-12 16:00 - 16:15	30	0	0	0	0	2	4	4	4	4	0
2013-Dec-12 17:00 - 17:15	10	10	0	0	0	0	0	0	0	0	0
2013-Dec-12 20:00 - 20:15	2	1	0	1	0	1	3	3	1	3	0
2013-Dec-12 10:15 - 10:30	2	0	0	0	0	1	2	4	1	2	1
2013-Dec-12 11:15 - 11:30	5	0	0	0	0	4	0	4	0	0	0
2013-Dec-12 12:15 - 12:30	29	10	9	0	0	18	10	27	8	10	1
2013-Dec-12 13:15 - 13:30	9	0	0	0	0	0	4	12	3	4	0
2013-Dec-12 15:15 - 15:30	6	1	0	0	0	1	2	2	2	2	0
2013-Dec-12 10:30 - 10:45	3	0	0	0	0	1	3	3	2	3	0

See Table 7–44 for what the **Contact Report** contains in the **Comparison View (Contact Type)**.

Table 7–44 Contact Report – Comparison (Contact Type)

Field	Description
Interval	The quarter-hourly interval for which the report is shown.
Total Contacts	The total contacts uploaded for the selected filter criteria.
Open Contacts	The count of contacts still open from the total contacts.
Never Dialed	The count of contacts that have never been dialed from the total contacts.
Personal Callbacks - Open	The count of personal callbacks open from the total contacts.
Regular Callback - Open	The count of regular callbacks open from the total contacts.
Closed Contacts	The count of closed contacts from the total contacts.

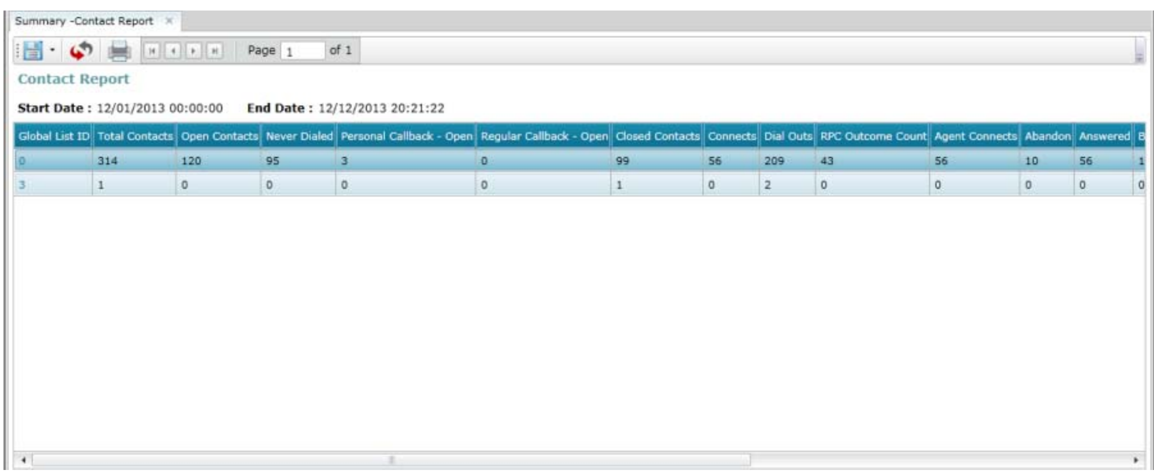
Field	Description
Connects	The count of contacts dialed at least once from the total contacts.
Dial Out	The count of dial outs from the total contacts.
RPC Outcome Count	The count of contacts marked RPC (right party connect) type of outcome.
Agent Connects	The count of contacts correctly connected to agents from the total contacts.
Abandon	The count of contacts abandoned by the customer or the dialer from the total contacts.
Answered	The count of dial outs successfully answered by customer. (Agent Connects + Abandon)
Business Success Outcome Count	All attempts with outcomes marked with **Success Business Outcome** type from the total contacts.
Business Failure Outcome Count	All attempts with outcomes marked with **Failure Business Outcome** type from the total contacts.
Voice Success Outcome Count	All attempts with outcomes marked with **Success Voice Outcome** type from the total contacts.
Voice Failure Outcome Count	All attempts with outcomes marked with **Failure Voice Outcome** type from the total contacts.
Success Outcome	The total count of success outcomes. Success Business Outcome + Success Voice Outcome
Failure Outcome	The total count of failure outcomes. Failure Business Outcome + Failure Voice Outcome
Personal Callback - Closed	The count of personal callbacks closed from the total contacts.
Regular Callback - Closed	The count of regular callbacks closed from the total contacts.
Churn %	The percentage of contacts churned out of the total contacts. ((Contacts-Never Dialed)/Contacts) * 100
Complete %	The percentage of contacts closed out of the total contacts. (Closed Contacts/Contacts) * 100
RPC %	The percentage of RPC out of the total contacts. (RPC/Dial Outs) * 100
Hit Rate %	The percentage of agent connects out of the total dial outs. (Agent Connects/Dial Outs) * 100
Abandon %	The percentage of abandoned calls out of answered calls. (Abandon/Answered) * 100
Answered %	The percentage of answered calls out of the total dial outs. (Answered/Dial Outs) * 100

Field	Description
Success %	The percentage of contact with success outcome out of the total contacts. (Success Outcome/Contacts) * 100
Business Success %	The percentage of contact with a successful business outcome out of the total contacts. (Success Business Outcome/Contacts) * 100
Business Success RPC %	The percentage of contact with a successful business outcome out of the total RPC contacts. (Success Business Outcome/RPC) * 100
Average Dial Out per RPC Contact	The average dial outs taken for each RPC contact. Dial Outs/RPC
Average Dial Out per Closed Contact	The average dial outs taken for each RPC contact. Dial Outs/Closed Contacts
Average Dial Out per Contact	The average dial outs taken for each RPC contact. Dial Outs/Contacts
Average Dial Out per Success Contact	The average dial outs taken for each RPC contact. Dial Outs/Success Outcome
Average Dial Out per Business Success Contact	The average dial outs taken for each RPC contact. Dial Outs/Business Success Outcome

To see an **Entity View (Contact Type)**, as shown in Figure 7–55, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–55Category Report - Entity (Contact Type)



See Table 7–45 for what the **Category Report** contains in the **Entity View (Contact Type)**.

Table 7–45 Category Report - Entity (Contact Type)

Field	Description
Entity	The entity for which report is shown. In the report shown above, the entity is the Global List and hence each Global List ID is shown as a separate line item.
Total Contacts	The total contacts uploaded for the selected filter criteria.
Open Contacts	The count of contacts still open from the total contacts.
Never Dialed	The count of contacts that have never been dialed from the total contacts.
Personal Callbacks - Open	The count of personal callbacks open from the total contacts.
Regular Callback - Open	The count of regular callbacks open from the total contacts.
Closed Contacts	The count of closed contacts from the total contacts.
Connects	The count of contacts dialed at least once from the total contacts.
Dial Out	The count of dial outs from the total contacts.
RPC Outcome Count	The count of contacts marked RPC (right party connect) type of outcome.
Agent Connects	The count of contacts correctly connected to agents from the total contacts.
Abandon	The count of contacts abandoned by the customer or the dialer from the total contacts.
Answered	The count of dial outs successfully answered by customer. (Agent Connects + Abandon)
Business Success Outcome Count	All attempts with outcomes marked with **Success Business Outcome** type from the total contacts.
Business Failure Outcome Count	All attempts with outcomes marked with **Failure Business Outcome** type from the total contacts.
Voice Success Outcome Count	All attempts with outcomes marked with **Success Voice Outcome** type from the total contacts.
Voice Failure Outcome Count	All attempts with outcomes marked with **Failure Voice Outcome** type from the total contacts.
Success Outcome	The total count of success outcomes. Success Business Outcome + Success Voice Outcome
Failure Outcome	The total count of failure outcomes. Failure Business Outcome + Failure Voice Outcome
Personal Callback - Closed	The count of personal callbacks closed from the total contacts.
Regular Callback - Closed	The count of regular callbacks closed from the total contacts.

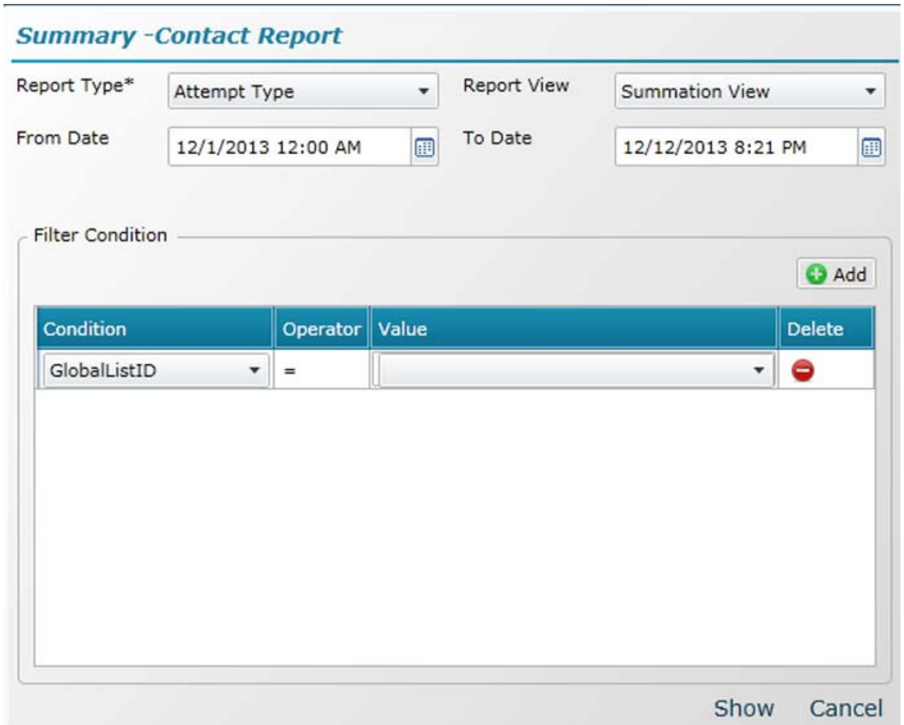
Field	Description
Churn %	The percentage of contacts churned out of the total contacts. ((Contacts-Never Dialed)/Contacts) * 100
Complete %	The percentage of contacts closed out of the total contacts. (Closed Contacts/Contacts) * 100
RPC %	The percentage of RPC out of the total contacts. (RPC/Dial Outs) * 100
Hit Rate %	The percentage of agent connects out of the total dial outs. (Agent Connects/Dial Outs) * 100
Abandon %	The percentage of abandoned calls out of answered calls. (Abandon/Answered) * 100
Answered %	The percentage of answered calls out of the total dial outs. (Answered/Dial Outs) * 100
Success %	The percentage of contact with success outcome out of the total contacts. (Success Outcome/Contacts) * 100
Business Success %	The percentage of contact with a successful business outcome out of the total contacts. (Success Business Outcome/Contacts) * 100
Business Success RPC %	The percentage of contact with a successful business outcome out of the total RPC contacts. (Success Business Outcome/RPC) * 100
Average Dial Out per RPC Contact	The average dial outs taken for each RPC contact. Dial Outs/RPC
Average Dial Out per Closed Contact	The average dial outs taken for each RPC contact. Dial Outs/Closed Contacts
Average Dial Out per Contact	The average dial outs taken for each RPC contact. Dial Outs/Contacts
Average Dial Out per Success Contact	The average dial outs taken for each RPC contact. Dial Outs/Success Outcome
Average Dial Out per Business Success Contact	The average dial outs taken for each RPC contact. Dial Outs/Business Success Outcome

Click Report Intervals to see the report for various intervals.

Attempt Type

Click **Contact Report** in the right pane to pop up the report parameters as shown in Figure 7–56.

Figure 7–56Contact Report - Parameters



Complete the fields as shown in Table 7–46.

Table 7–46 Contact Report - Parameters

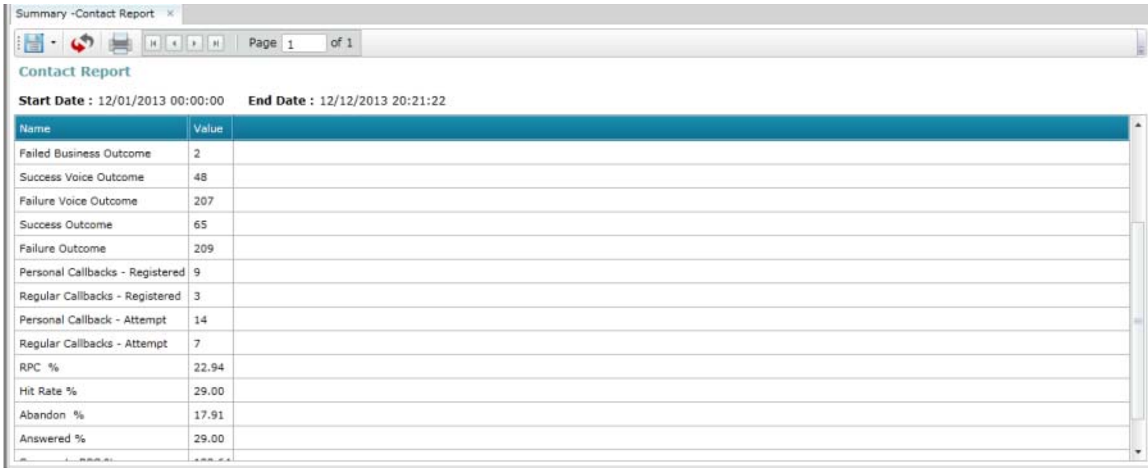
Field	Action	Description
Report Type	Select from drop-down list.	The report type that you want.
Report View	Select from drop-down list.	The report view that you want to see.
From Date	Select from pop up date panel.	Select a **From Date** for the report.
To Date	Select from pop up date panel.	Select a **To Date** for the report.

Complete the Filter Conditions.

Click **Show** to see the **Summation View (Attempt Type)** of the report as shown in Figure 7–57.

Click Report Intervals to see the report for various intervals.

Figure 7–57Contact Report - Summation (Attempt Type)



See Table 7–47 for what the **Contact Report** contains in the **Summation View (Attempt Type)**.

Table 7–47 Contact Report – Summation (Attempt Type))

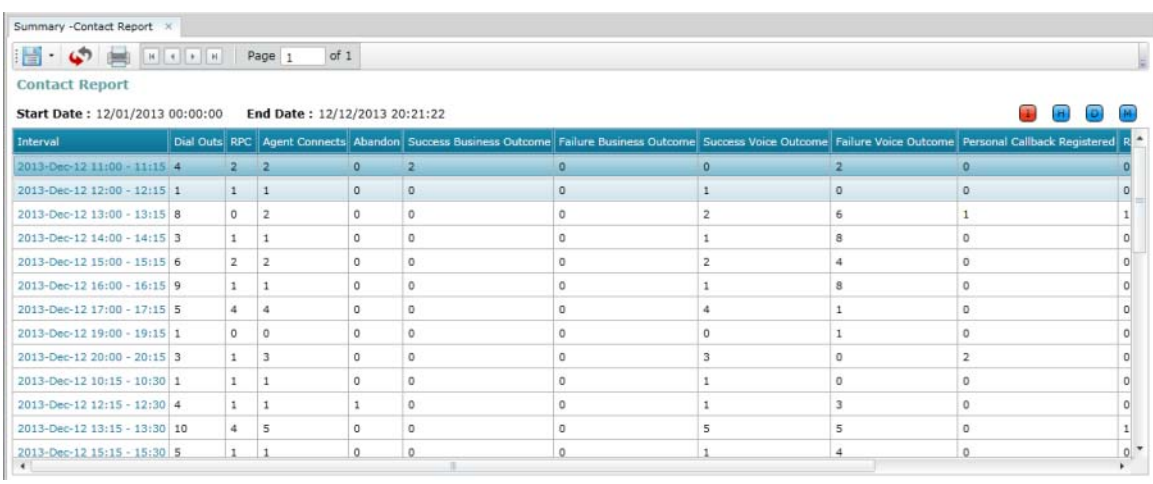
Field (Name)	Description
Dial Outs	The number of dial outs for the selected filter criteria.
RPC	The count of contacts marked RPC (right party connect) type of outcome.
RPC %	The percentage of RPC out of the total contacts. (RPC/Dial Outs) * 100
Agent Connects	The count of contacts correctly connected to agents from the total contacts.
Abandon	The count of contacts abandoned by the customer or the dialer from the total contacts.
Answered	The count of dial outs successfully answered by customer. (Agent Connects + Abandon)
Hit Rate %	The percentage of agent connects out of the total dial outs. (Agent Connects/Dial Outs) * 100
Abandon %	The percentage of abandoned calls out of answered calls. (Abandon/Answered) * 100
Answered %	The percentage of answered calls out of the total dial outs. (Answered/Dial Outs) * 100
Success Business Outcome	All attempts with outcomes marked with **Success Business Outcome** type for the date range.

Field (Name)	Description
Failure Business Outcome	All attempts with outcomes marked with **Failure Business Outcome** type for the date range.
Success Voice Outcome	All attempts with outcomes marked with **Success Voice Outcome** type for the date range.
Failure Voice Outcome	All attempts with outcomes marked with **Failure Voice Outcome** type for the date range.
Success Outcome	The total count of success outcomes. Success Business Outcome + Success Voice Outcome
Failure Outcome	The total count of failure outcomes. Failure Business Outcome + Failure Voice Outcome
Success to RPC %	The percentage of RPC out of the contacts marked as success. (RPC/Dial Outs) * 100
Business Success to RPC %	The percentage of contacts with a successful business outcome out of the total RPC contacts. (Success Business Outcome/RPC) * 100
Personal Callbacks - Register	The count of personal callbacks registered for the selected filter criteria.
Regular Callbacks - Register	The count of regular callbacks registered for the selected filter criteria.
Personal Callbacks - Attempt	The count of personal callbacks attempted for the selected filter criteria.
Regular Callbacks - Attempt	The count of regular callbacks attempted for the selected filter criteria.

To see a **Comparison View (Attempt Type)**, as shown in Figure 7–58, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–58Contact Report - Comparison (Attempt Type)



Interval	Dial Outs	RPC	Agent Connects	Abandon	Success Business Outcome	Failure Business Outcome	Success Voice Outcome	Failure Voice Outcome	Personal Callback Registered	R
2013-Dec-12 11:00 - 11:15	4	2	2	0	2	0	0	2	0	0
2013-Dec-12 12:00 - 12:15	1	1	1	0	0	0	1	0	0	0
2013-Dec-12 13:00 - 13:15	8	0	2	0	0	0	2	6	1	1
2013-Dec-12 14:00 - 14:15	3	1	1	0	0	0	1	8	0	0
2013-Dec-12 15:00 - 15:15	6	2	2	0	0	0	2	4	0	0
2013-Dec-12 16:00 - 16:15	9	1	1	0	0	0	1	8	0	0
2013-Dec-12 17:00 - 17:15	5	4	4	0	0	0	4	1	0	0
2013-Dec-12 19:00 - 19:15	1	0	0	0	0	0	0	1	0	0
2013-Dec-12 20:00 - 20:15	3	1	3	0	0	0	3	0	2	0
2013-Dec-12 10:15 - 10:30	1	1	1	0	0	0	1	0	0	0
2013-Dec-12 12:15 - 12:30	4	1	1	1	0	0	1	3	0	0
2013-Dec-12 13:15 - 13:30	10	4	5	0	0	0	5	5	0	1
2013-Dec-12 15:15 - 15:30	5	1	1	0	0	0	1	4	0	0

See Table 7–48 for what the **Contact Report** contains in the **Comparison View (Attempt Type)**.

Table 7–48 Contact Report – Comparison (Attempt Type)

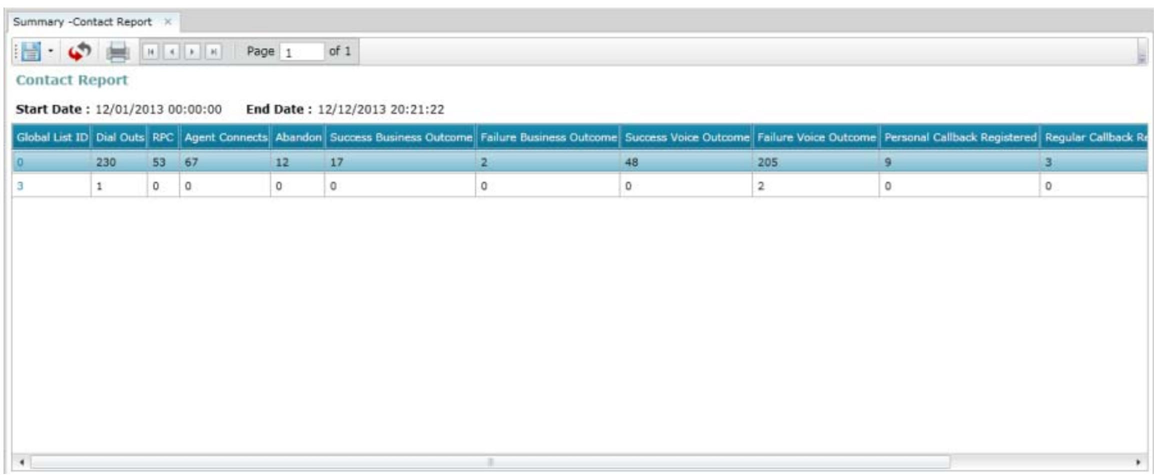
Field (Name)	Description
Interval	The quarter-hourly interval for which the report is shown.
Dial Outs	The number of dial outs for the selected filter criteria.
RPC	The count of contacts marked RPC (right party connect) type of outcome.
RPC %	The percentage of RPC out of the total contacts. (RPC/Dial Outs) * 100
Agent Connects	The count of contacts correctly connected to agents from the total contacts.
Abandon	The count of contacts abandoned by the customer or the dialer from the total contacts.
Answered	The count of dial outs successfully answered by customer. (Agent Connects + Abandon)
Hit Rate %	The percentage of agent connects out of the total dial outs. (Agent Connects/Dial Outs) * 100
Abandon %	The percentage of abandoned calls out of answered calls. (Abandon/Answered) * 100
Answered %	The percentage of answered calls out of the total dial outs. (Answered/Dial Outs) * 100
Success Business Outcome	All attempts with outcomes marked with **Success Business Outcome** type for the date range.
Failure Business Outcome	All attempts with outcomes marked with **Failure Business Outcome** type for the date range.
Success Voice Outcome	All attempts with outcomes marked with **Success Voice Outcome** type for the date range.
Failure Voice Outcome	All attempts with outcomes marked with **Failure Voice Outcome** type for the date range.
Success Outcome	The total count of success outcomes. Success Business Outcome + Success Voice Outcome
Failure Outcome	The total count of failure outcomes. Failure Business Outcome + Failure Voice Outcome
Success to RPC %	The percentage of RPC out of the contacts marked as success. (RPC/Dial Outs) * 100
Business Success to RPC %	The percentage of contacts with a successful business outcome out of the total RPC contacts. (Success Business Outcome/RPC) * 100

Field (Name)	Description
Personal Callbacks - Register	The count of personal callbacks registered for the selected filter criteria.
Regular Callbacks - Register	The count of regular callbacks registered for the selected filter criteria.
Personal Callbacks - Attempt	The count of personal callbacks attempted for the selected filter criteria.
Regular Callbacks - Attempt	The count of regular callbacks attempted for the selected filter criteria.

To see an **Entity View (Attempt Type)**, as shown in Figure 7–59, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–59Contact Report - Entity (Attempt Type)



See Table 7–49 for what the **Category Report** contains in the **Entity View (Attempt Type)**.

Table 7–49 Category Report - Entity (Attempt Type)

Field (Name)	Description
Entity	The entity for which report is shown. In the report shown above, the entity is the Global List and hence each Global List ID is shown as a separate line item.
Dial Outs	The number of dial outs for the selected filter criteria.
RPC	The count of contacts marked RPC (right party connect) type of outcome.
RPC %	The percentage of RPC out of the total contacts. (RPC/Dial Outs) * 100
Agent Connects	The count of contacts correctly connected to agents from the total contacts.

Field (Name)	Description
Abandon	The count of contacts abandoned by the customer or the dialer from the total contacts.
Answered	The count of dial outs successfully answered by customer. (Agent Connects + Abandon)
Hit Rate %	The percentage of agent connects out of the total dial outs. (Agent Connects/Dial Outs) * 100
Abandon %	The percentage of abandoned calls out of answered calls. (Abandon/Answered) * 100
Answered %	The percentage of answered calls out of the total dial outs. (Answered/Dial Outs) * 100
Success Business Outcome	All attempts with outcomes marked with **Success Business Outcome** type for the date range.
Failure Business Outcome	All attempts with outcomes marked with **Failure Business Outcome** type for the date range.
Success Voice Outcome	All attempts with outcomes marked with **Success Voice Outcome** type for the date range.
Failure Voice Outcome	All attempts with outcomes marked with **Failure Voice Outcome** type for the date range.
Success Outcome	The total count of success outcomes. Success Business Outcome + Success Voice Outcome
Failure Outcome	The total count of failure outcomes. Failure Business Outcome + Failure Voice Outcome
Success to RPC %	The percentage of RPC out of the contacts marked as success. (RPC/Dial Outs) * 100
Business Success to RPC %	The percentage of contacts with a successful business outcome out of the total RPC contacts. (Success Business Outcome/RPC) * 100
Personal Callbacks - Register	The count of personal callbacks registered for the selected filter criteria.
Regular Callbacks - Register	The count of regular callbacks registered for the selected filter criteria.
Personal Callbacks - Attempt	The count of personal callbacks attempted for the selected filter criteria.
Regular Callbacks - Attempt	The count of regular callbacks attempted for the selected filter criteria.

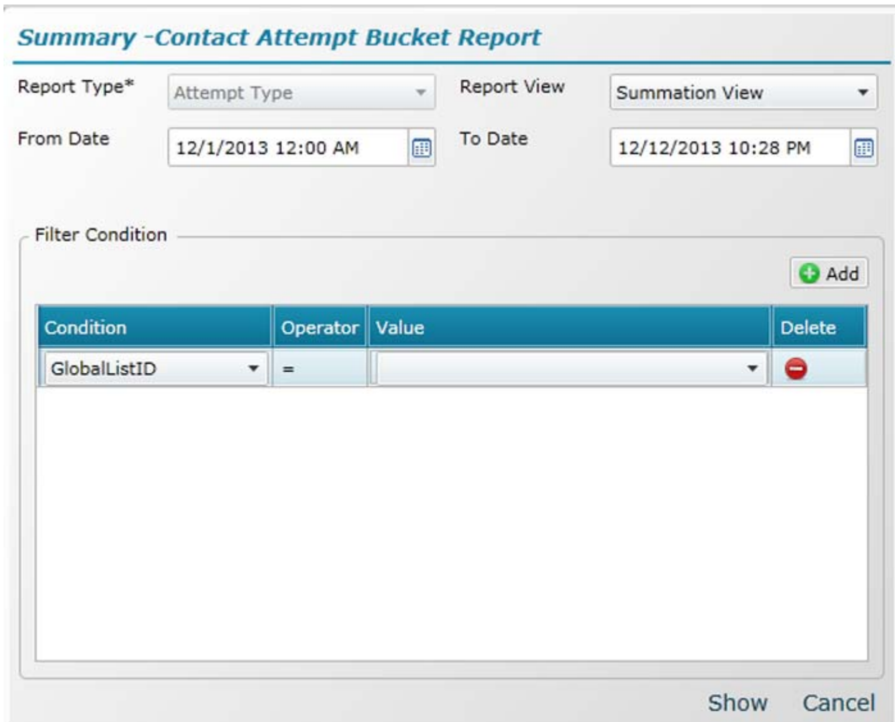
Click Report Intervals to see the report for various intervals.

7.2.2.5 Summary Contact Attempt Bucket Report

Summary Contact Attempt Bucket Report shows the number of dialing attempts made before closing contacts, for the selected filter criteria.

Click Contact Attempt Bucket Report in the right pane to pop up the report parameters as shown in Figure 7–60.

Figure 7–60Contact Attempt Bucket Report - Parameters



Complete the fields as shown in Table 7–50.

Table 7–50 Contact Attempt Bucket Report - Parameters

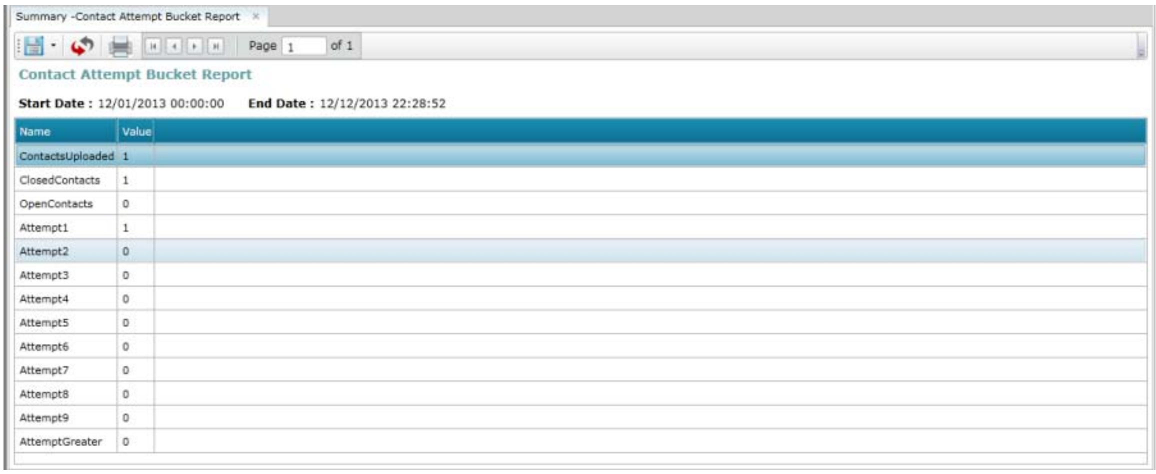
Field	Action	Description
Report Type	Select from drop-down list.	The report type that you want.
Report View	Select from drop-down list.	The report view that you want to see.
From Date	Select from pop up date panel.	Select a **From Date** for the report.
To Date	Select from pop up date panel.	Select a **To Date** for the report.
Channel Type	Select from drop-down list.	The channel for which you want the report.

Complete the Filter Conditions.

Click **Show** to see the **Contact Attempt Bucket Report - Summation** of the report as shown in Figure 7–61.

Click Report Intervals to see the report for various intervals.

Figure 7–61Contact Attempt Bucket Report - Summation



See Table 7–51 for what the **Contact Attempt Bucket Report** contains in the **Summation View.**

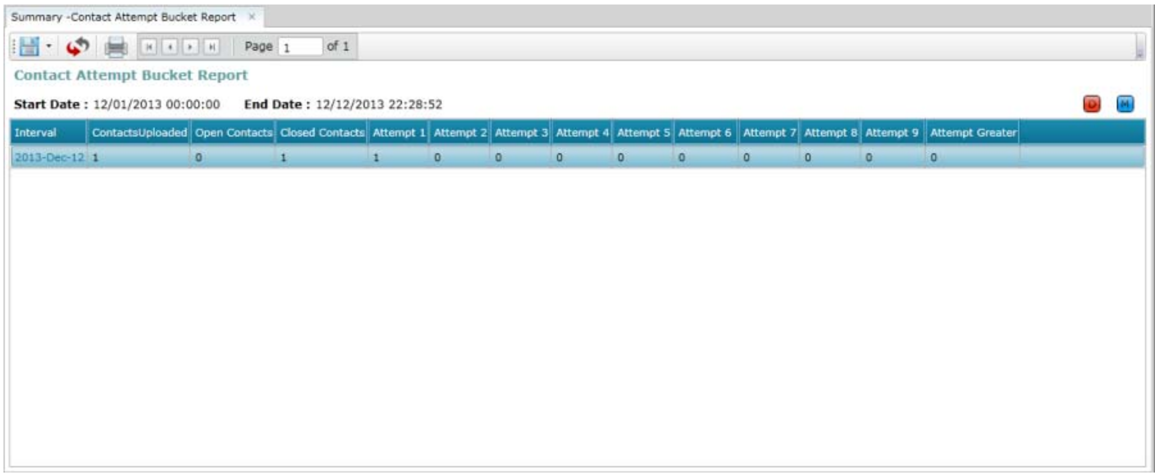
Table 7–51 Contact Attempt Bucket Report - Summation

Field (Name)	Description
Contacts	The total contacts uploaded for the selected filter criteria.
Closed Contacts	The number of closed contacts from the total contacts.
Open Contacts	The number of contacts still open from the total contacts.
Attempt 0	The number of contacts that have never been attempted.
Attempt 1	The number of contacts attempted once.
Attempt 2	The number of contacts attempted twice.
Attempt 3	The number of contacts attempted thrice.
Attempt 4	The number of contacts attempted four times.
Attempt 5	The number of contacts attempted five times.
Attempt 6	The number of contacts attempted six times.
Attempt 7	The number of contacts attempted seven times.
Attempt 8	The number of contacts attempted eight times.
Attempt 9	The number of contacts attempted nine times.
Attempt Greater	The number of contacts attempted ten times or higher.

To see a **Comparison View**, as shown in Figure 7–62, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–62Contact Attempt Bucket Report - Comparison



See Table 7–52 for what the **Contact Attempt Bucket Report** contains in the **Comparison View**.

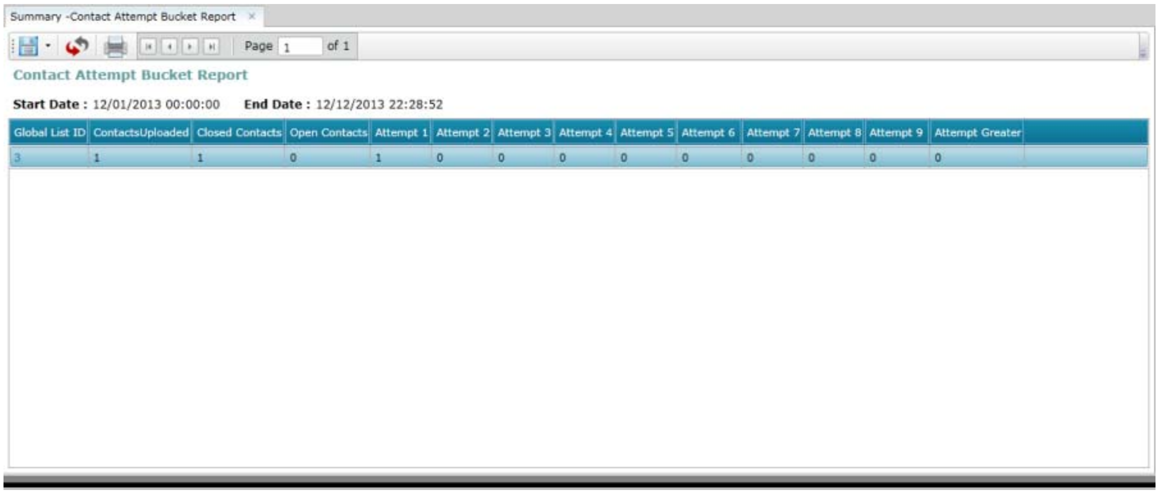
Table 7–52 Contact Attempt Bucket Report - Comparison

Field (Name)	**Description**
Interval	The quarter-hourly interval for which the report is shown.
Contacts	The total contacts uploaded for the selected filter criteria.
Closed Contacts	The number of closed contacts from the total contacts.
Open Contacts	The number of contacts still open from the total contacts.
Attempt 0	The number of contacts that have never been attempted.
Attempt 1	The number of contacts attempted once.
Attempt 2	The number of contacts attempted twice.
Attempt 3	The number of contacts attempted thrice.
Attempt 4	The number of contacts attempted four times.
Attempt 5	The number of contacts attempted five times.
Attempt 6	The number of contacts attempted six times.
Attempt 7	The number of contacts attempted seven times.
Attempt 8	The number of contacts attempted eight times.
Attempt 9	The number of contacts attempted nine times.
Attempt Greater	The number of contacts attempted ten times or higher.

To see an **Entity View**, as shown in Figure 7–63, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–63Contact Attempt Bucket Report - Entity



See Table 7–53 for what the **Contact Attempt Bucket Report** contains in the **Entity View**.

Table 7–53 Contact Attempt Bucket Report - Entity

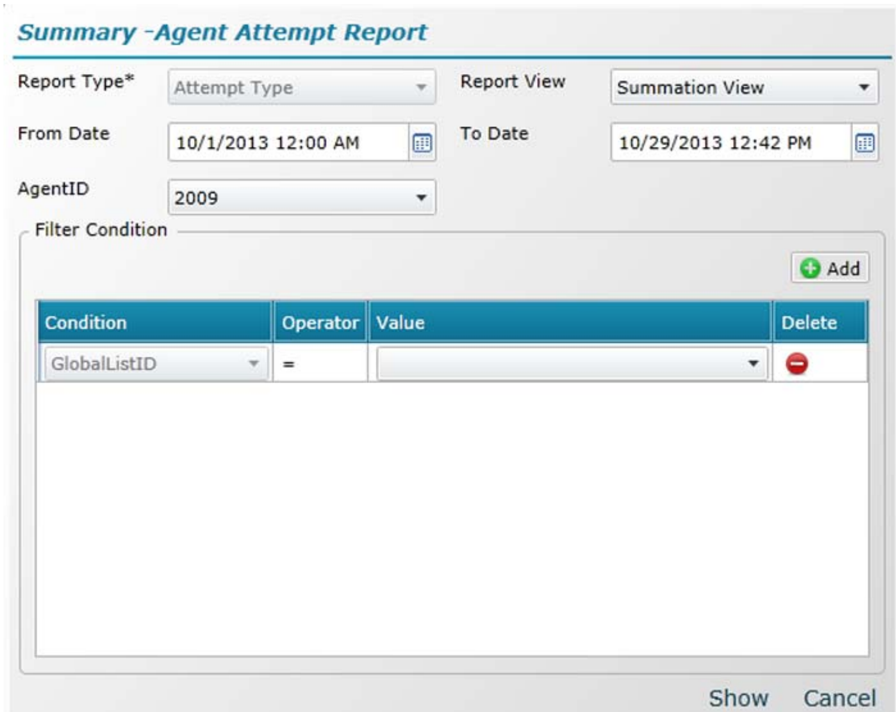
Field (Name)	Description
Entity	The entity for which report is shown. In the report shown above, the entity is the Global List and hence each Global List ID is shown as a separate line item.
Contacts	The total contacts uploaded for the selected filter criteria.
Closed Contacts	The number of closed contacts from the total contacts.
Open Contacts	The number of contacts still open from the total contacts.
Attempt 0	The number of contacts that have never been attempted.
Attempt 1	The number of contacts attempted once.
Attempt 2	The number of contacts attempted twice.
Attempt 3	The number of contacts attempted thrice.
Attempt 4	The number of contacts attempted four times.
Attempt 5	The number of contacts attempted five times.
Attempt 6	The number of contacts attempted six times.
Attempt 7	The number of contacts attempted seven times.
Attempt 8	The number of contacts attempted eight times.
Attempt 9	The number of contacts attempted nine times.
Attempt Greater	The number of contacts attempted ten times or higher.

7.2.2.6 Summary Agent Attempt Report

Summary Agent Attempt Report shows the number of dialing attempts made by an agent for various outcomes, for the selected filter criteria.

Click **Agent Attempt Report** in the right pane to pop up the report parameters as shown in Figure 7–64.

Figure 7–64Agent Attempt Report - Parameters



Complete the fields as shown in Table 7–54.

Table 7–54 Agent Attempt Report - Parameters

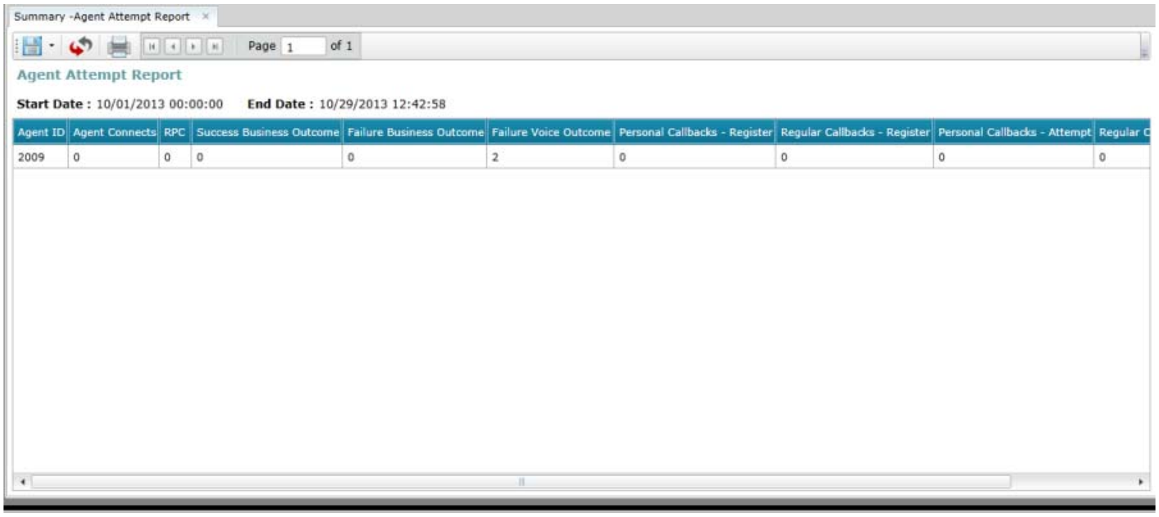
Field	Action	Description
Report Type	Select from drop-down list.	The report type that you want.
Report View	Select from drop-down list.	The report view that you want to see.
From Date	Select from pop up date panel.	Select a **From Date** for the report.
To Date	Select from pop up date panel.	Select a **To Date** for the report.
Agent ID	Select from drop-down list.	The agent for whom you want the report.

Complete the Filter Conditions.

Click **Show** to see the **Agent Attempt Report - Summation** of the report as shown in Figure 7–65.

Click Report Intervals to see the report for various intervals.

Figure 7–65Agent Attempt Report - Summation



See Table 7–55 for what the **Agent Attempt Report** contains in the **Summation View**.

Table 7–55 Agent Attempt Report - Summation

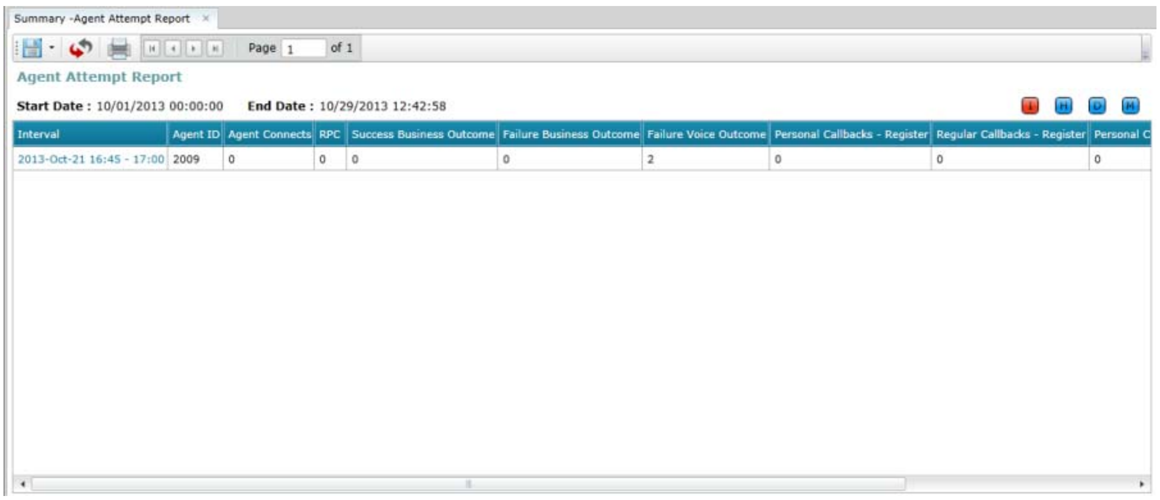
Field (Name)	Description
Agent Connects	The number of dial outs successfully connected to the agent, for the selected filter criteria.
RPC	The count of contacts marked RPC (right party connect) type of outcome.
RPC %	The percentage of RPC out of the total contacts. (RPC/Dial Outs) * 100
Success Business Outcome	All attempts with outcomes marked with **Success Business Outcome** type for the date range.
Failure Business Outcome	All attempts with outcomes marked with **Failure Business Outcome** type for the date range.
Failure Voice Outcome	All attempts with outcomes marked with **Failure Voice Outcome** type for the date range.
Business Success to RPC %	The percentage of contacts with a successful business outcome out of the total RPC contacts. (Success Business Outcome/RPC) * 100
Personal Callbacks - Register	The count of personal callbacks registered for the selected filter criteria.
Regular Callbacks - Register	The count of regular callbacks registered for the selected filter criteria.
Personal Callbacks - Attempt	The count of personal callbacks attempted for the selected filter criteria.

Field (Name)	Description
Regular Callbacks - Attempt	The count of regular callbacks attempted for the selected filter criteria.

To see a **Comparison View**, as shown in Figure 7–66, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–66Agent Attempt Report - Comparison



See Table 7–56 for what the **Agent Attempt Report** contains in the **Comparison View**.

Table 7–56 Agent Attempt Report - Comparison

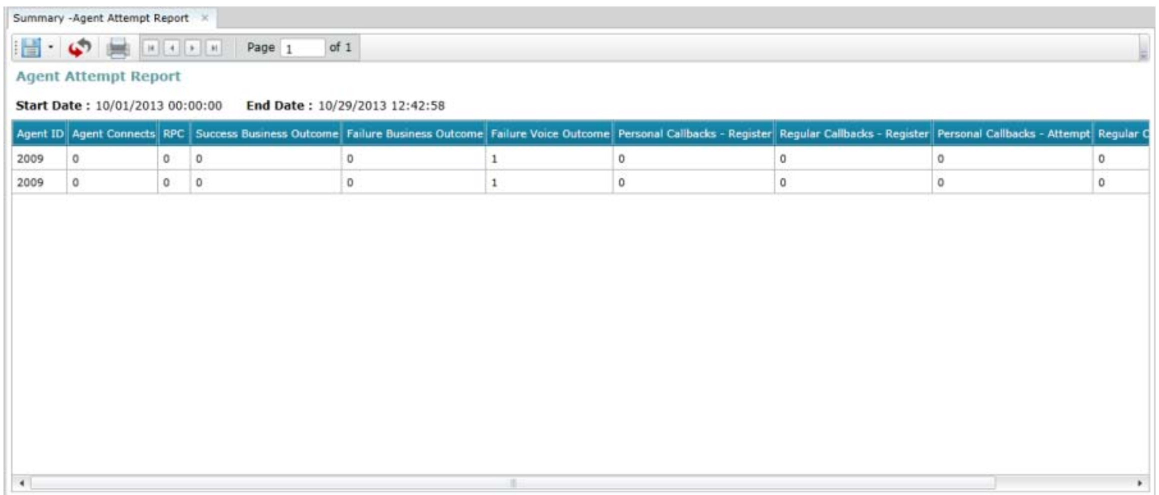
Field (Name)	Description
Interval	The quarter-hourly interval for which the report is shown.
Agent Connects	The number of dial outs successfully connected to the agent, for the selected filter criteria.
RPC	The count of contacts marked RPC (right party connect) type of outcome.
RPC %	The percentage of RPC out of the total contacts. (RPC/Dial Outs) * 100
Success Business Outcome	All attempts with outcomes marked with **Success Business Outcome** type for the date range.
Failure Business Outcome	All attempts with outcomes marked with **Failure Business Outcome** type for the date range.
Failure Voice Outcome	All attempts with outcomes marked with **Failure Voice Outcome** type for the date range.
Business Success to RPC %	The percentage of contacts with a successful business outcome out of the total RPC contacts. (Success Business Outcome/RPC) * 100

Field (Name)	Description
Personal Callbacks - Register	The count of personal callbacks registered for the selected filter criteria.
Regular Callbacks - Register	The count of regular callbacks registered for the selected filter criteria.
Personal Callbacks - Attempt	The count of personal callbacks attempted for the selected filter criteria.
Regular Callbacks - Attempt	The count of regular callbacks attempted for the selected filter criteria.

To see an **Entity View**, as shown in Figure 7–67, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–67Agent Attempt Report - Entity



See Table 7–57 for what the **Agent Attempt Report** contains in the **Entity View**.

Table 7–57 Agent Attempt Report - Entity

Field (Name)	Description
Entity	The entity for which report is shown. In the report shown above, the entity is the Global List and hence each Agent ID is shown as a separate line item.
Agent Connects	The number of dial outs successfully connected to the agent, for the selected filter criteria.
RPC	The count of contacts marked RPC (right party connect) type of outcome.
RPC %	The percentage of RPC out of the total contacts. (RPC/Dial Outs) * 100

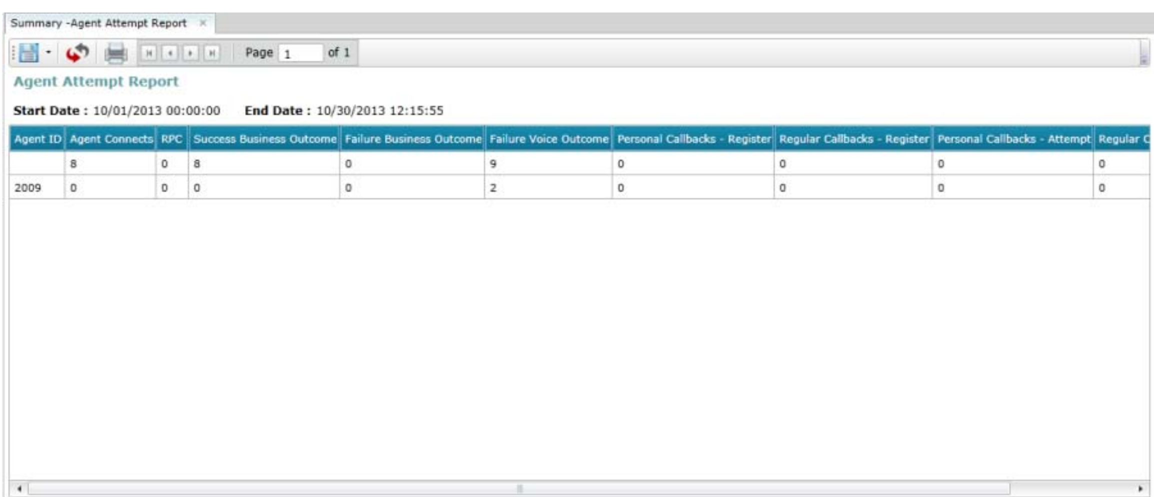
Field (Name)	Description
Success Business Outcome	All attempts with outcomes marked with **Success Business Outcome** type for the date range.
Failure Business Outcome	All attempts with outcomes marked with **Failure Business Outcome** type for the date range.
Failure Voice Outcome	All attempts with outcomes marked with **Failure Voice Outcome** type for the date range.
Personal Callbacks - Register	The count of personal callbacks registered for the selected filter criteria.
Regular Callbacks - Register	The count of regular callbacks registered for the selected filter criteria.
Personal Callbacks - Attempt	The count of personal callbacks attempted for the selected filter criteria.
Regular Callbacks - Attempt	The count of regular callbacks attempted for the selected filter criteria.
Global List ID	The list ID for which report is generated.
RPC	The count of contacts marked RPC (right party connect) type of outcome.
Business Success to RPC %	The percentage of contacts with a successful business outcome out of the total RPC contacts. (Success Business Outcome/RPC) * 100

Note: For the **Agent Attempt Report**, you can generate an additional view - **Agent View**. The report is generated, among other selection criteria, for selected multiple agents. You are allowed to select one, multiple, or all agents from the **Agent ID** drop-down list using appropriate checkboxes.

To see an **Agent View**, as shown in Figure 7–68, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–68Agent Attempt Report - Agent



See Table 7–58 for what the **Agent Attempt Report** contains in the **Agent View**.

Table 7–58 Agent Attempt Report - Agent

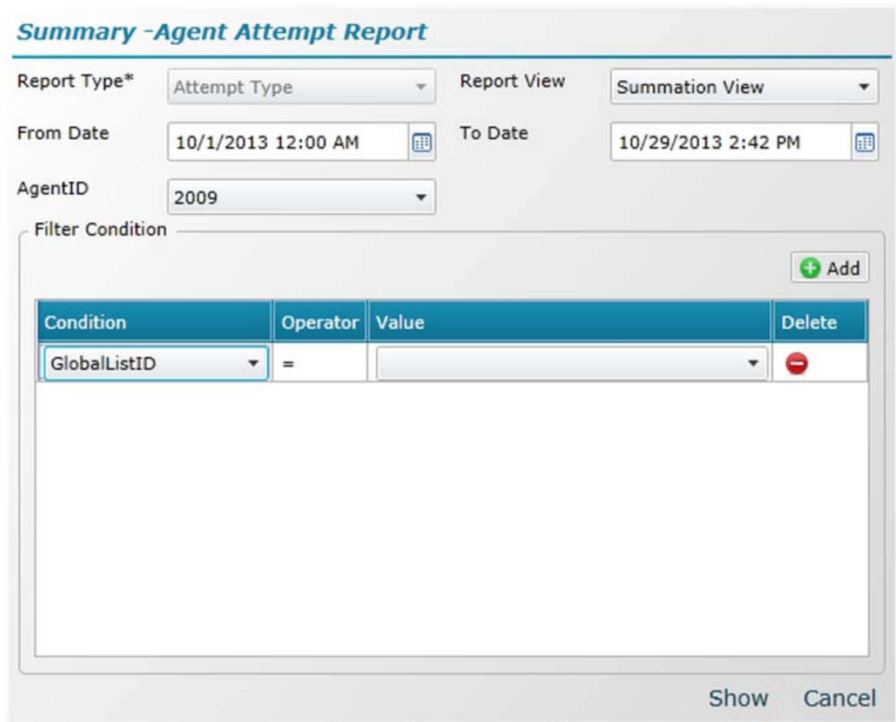
Field (Name)	Description
Entity	The entity for which report is shown. In the report shown above, the entity is the Global List and hence each Agent ID is shown as a separate line item.
Agent Connects	The number of dial outs successfully connected to the agent, for the selected filter criteria.
RPC %	The percentage of RPC out of the total contacts. (RPC/Dial Outs) * 100
Success Business Outcome	All attempts with outcomes marked with **Success Business Outcome** type for the date range.
Failure Business Outcome	All attempts with outcomes marked with **Failure Business Outcome** type for the date range.
Failure Voice Outcome	All attempts with outcomes marked with **Failure Voice Outcome** type for the date range.
Personal Callbacks - Register	The count of personal callbacks registered for the selected filter criteria.
Regular Callbacks - Register	The count of regular callbacks registered for the selected filter criteria.
Personal Callbacks - Attempt	The count of personal callbacks attempted for the selected filter criteria.
Regular Callbacks - Attempt	The count of regular callbacks attempted for the selected filter criteria.
RPC	The count of contacts marked RPC (right party connect) type of outcome.
Business Success to RPC %	The percentage of contacts with a successful business outcome out of the total RPC contacts. (Success Business Outcome/RPC) * 100

7.2.2.7 Summary Agent Outcome Report

Summary Agent Outcome Report lists the agent-specified business outcomes for selected filter criteria.

Click **Agent Outcome Report** in the right pane to pop up the report parameters as shown in Figure 7–69.

Figure 7–69Agent Outcome Report - Parameters



Complete the fields as shown in Table 7–59.

Table 7–59 Agent Outcome Report - Parameters

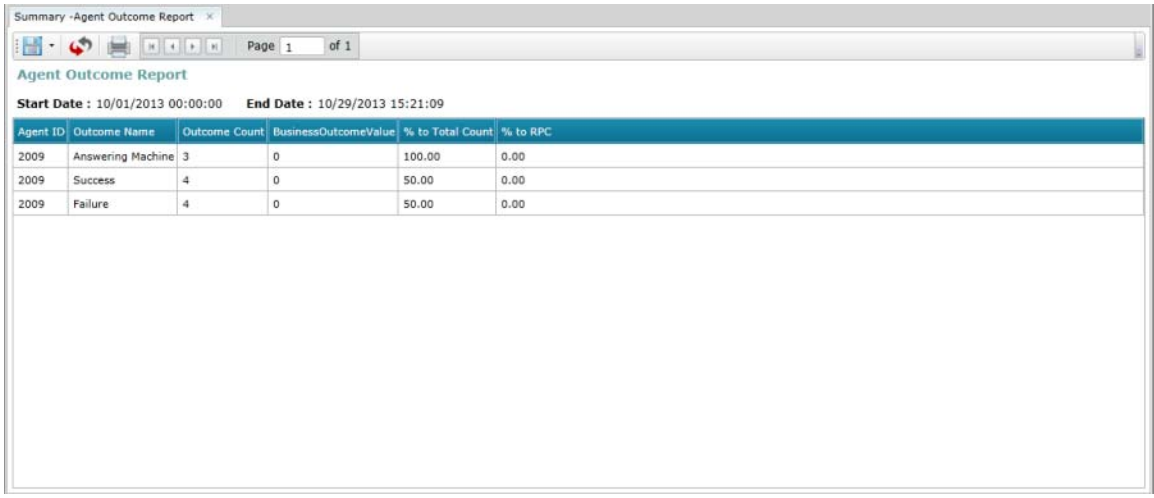
Field	Action	Description
Report Type	Select from drop-down list.	The report type that you want.
Report View	Select from drop-down list.	The report view that you want to see.
From Date	Select from pop up date panel.	Select a **From Date** for the report.
To Date	Select from pop up date panel.	Select a **To Date** for the report.
Agent ID	Select from drop-down list.	The agent for whom you want the report.

Complete the Filter Conditions.

Click **Show** to see the **Summation View** of the report as shown in Figure 7–70.

Click Report Intervals to see the report for various intervals.

Figure 7–70Agent Outcome Report - Summation



See Table 7–60 for what the **Agent Outcome Report** contains in the **Summation View**.

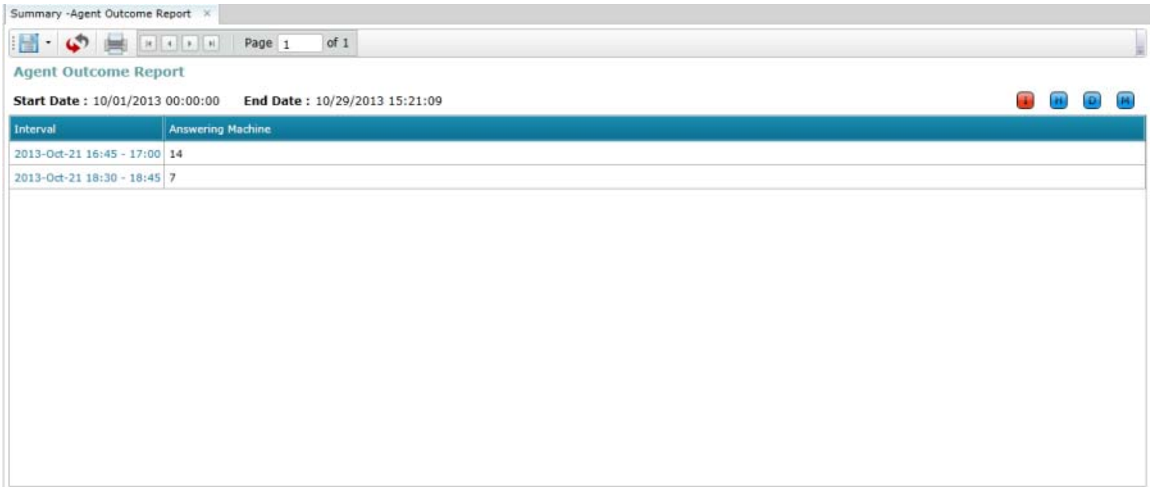
Table 7–60 Agent Outcome Report – Summation

Field	Description
Agent ID	The agent ID for whom you want the report.
Outcome Name	The outcome name as configured.
Outcome Count	The count of calls that have this outcome.
Business Outcome Value	The value for this outcome, if business outcome.
% to Total Count	The percentage of this outcome to the total calls.
% to RPC	The percentage of this outcome to the total RPC (right party connect) calls.

To see a **Comparison View**, as shown in Figure 7–71, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–71Agent Outcome Report - Comparison



See Table 7–61 for what the **Agent Outcome Report** contains in the **Comparison View**.

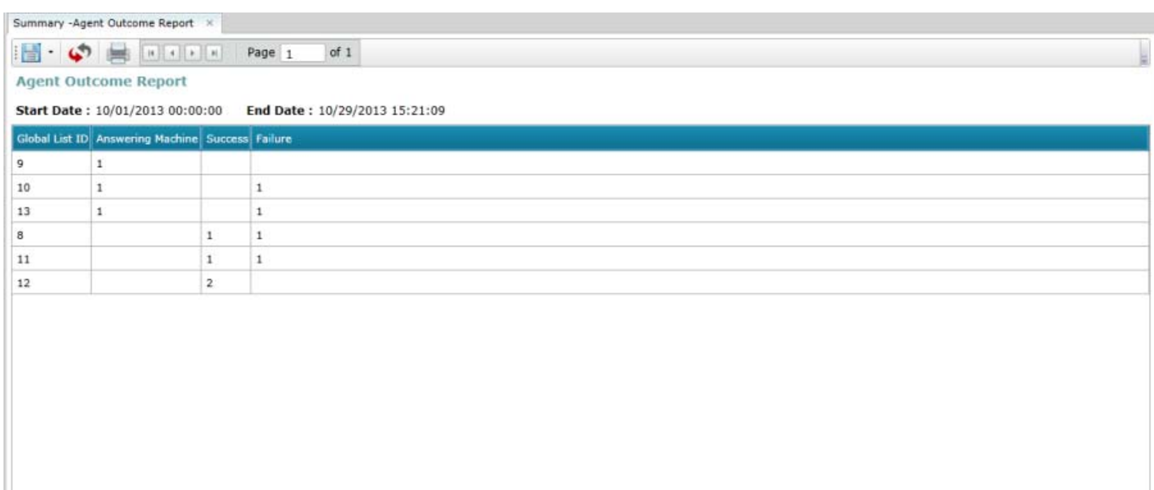
Table 7–61 Agent Outcome Report – Comparison

Field	Description
Interval	The quarter-hourly interval for which the result is shown.
Outcome Name	The count of calls for each configured outcome at one outcome per column. Shown above is the **Answering Machine** outcome.

To see an **Entity View**, as shown in Figure 7–72, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–72Agent Outcome Report - Entity



See Table 7–62 for what the **Agent Outcome Report** contains in the **Entity View**.

Table 7–62 Agent Outcome Report - Entity

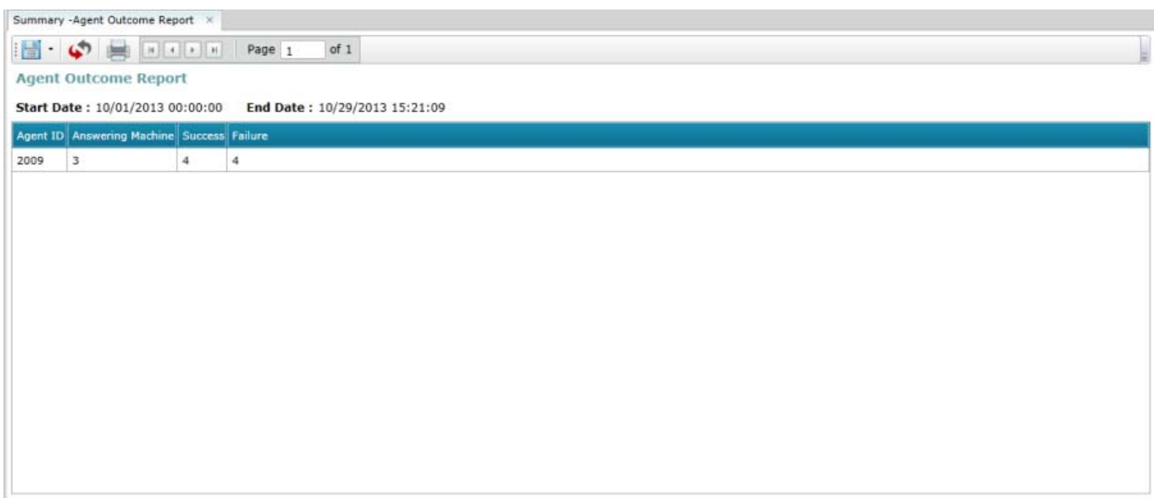
Field	Description
Global List ID	The Global List ID for which outcomes are listed.
Outcome Name	The count of calls for each configured outcome at one outcome per column. Shown above are **Answering Machine**, **Success**, and **Failure** outcomes.

Note: For the **Agent Outcome Report**, you can generate an additional view - **Agent View.** The report is generated, among other selection criteria, for selected multiple agents. You are allowed to select one, multiple, or all agents from the **Agent ID** drop-down list using appropriate checkboxes.

To see an **Agent View**, as shown in Figure 7–73, change Filter Conditions and click **Show** in the Report Parameters pop up.

Click Report Intervals to see the report for various intervals.

Figure 7–73Agent Outcome Report - Agent



See Table 7–63 for what the **Agent Outcome Report** contains in the **Entity View**.

Table 7–63 Agent Outcome Report - Agent

Field	Description
Agent ID	The agent ID for which you want this report.
Outcome Name	The count of calls for each configured outcome at one outcome per column. Shown above are **Answering Machine**, **Success**, and **Failure** outcomes.

Appendix - Sample Scripts

Pre-Call Script

Business Case: Fetch the 10 digit CustomerID from the business field1, compare the customerID with the external CRM DB.

Check the Overdue > 10000 and lastdate > today, the satisfied contact should be dialed rest others should not be dialed

```
Function Start(callid)

   dim con

   dim rs

   dim retValue

   dim CustomerID

   dim overDue

   dim LastDate

   set con=CreateObject("ADODB.Connection") 'Creating a ADODB.Connection

   con.Open "OrderStatusHost","testuser","test@123"

   if (Err.number<>0) then

        RetValue=false

        start=false

   end if

   if IsNull(Script.BussFld1) then

       RetValue=false

       rs.Close

       con.Close

       exit function

   end if

   customerID = Script.BussFld1
```

```
        set rs=con.Execute("select OverDue, LastDate from CustomerInfo where
  customerID     = '" & customerID & "'")

        if Err.Number<>0 or (rs.BOF=true and rs.EOF=true) then

            RetValue=false

            rs.Close

            con.Close

            exit function

         else

             rs.MoveFirst()

             overDue = rs.Fields("OverDue").Value

             LastDate = rs.Fields("LastDate").value

         if (overDue > 10000 and (DateDiff("d", LastDate, DateTime.Now) > 0) then

             RetValue=True 'Proceed to call the contact

         else

             RetValud=False

         end if

             rs.Close             'Closing the Record set

             con.Close            'Closing the Connection

 End Function
```

SMS Script

```
Function Start(callid)
    on error resume next
    Dim AccountID
    Dim subject
    Dim CustomerName
    Dim Balance
    Dim smsMessage
    Dim DueDate
    Dim Pic
    dim con
    dim rs
    dim PaidStatus
    dim retValue
    CustomerName = Script.BussFld1
    Balance = Script.BussFld2
    subject = Script.BussFld3
    DueDate = Script.BussFld4
    AccountID = Script.BussFld5
    Pic = "C:\logo.jpg"
    set con=CreateObject("ADODB.Connection") 'Creating a ADODB.Connection
    'Opening the Customer Table
    con.Open "TestDSN","testuser","testPwd"
    if (Err.number<>0) then
        RetValue=false
    end if
```

```
    'Checking for the number to be called against the values in the Database

    set rs=con.Execute("select PaidStatus from tblCustStatus where AccountID = '" &
    AccountID & "'") 'Querying the Database

    if Err.Number<>0 or (rs.BOF=true and rs.EOF=true) then

       PaidStatus = rs.Fields("PaidStatus").Value

     if (PaidStatus = 'N') then    'Not paid

           smsMessage = "Dear " & CustomerName & "," & vbCrlf & "Your credit card
           balance of Rs. " & Balance & " is due on " & DueDate & "." & vbCrlf & vbCrlf
           & "Please pay the balance to avoid the late payment fine."

           xmlData = "<?xml version='1.0' encoding='utf-8' ?>"

           Set objXML = CreateObject("MSXML2.XMLHTTP.3.0")

   strURL =
"http://api.clickatell.com/http/sendmsg?user=user1&password=pass123&api_id=3255582&to="
+ Script.ContactNumber + "&text=" + smsMessage

    objXML.open "GET", strURL, False

           'Call objXML.setRequestHeader("Content-Type", "text/plain")

           objXML.send

           Script.BusinessOutCome="00"

           set objXML = nothing

           RetValue=true

           exit function

       end if

    else

           RetValue=false

       end if
```

EMail Script

```
Function Start(callid)

   on error resume next

   Dim AccountID

   Dim subject

   Dim CustomerName

   Dim Balance

   Dim mailMessage

   Dim DueDate

   Dim Pic

   dim con

   dim rs

   dim PaidStatus

   dim retValue

   CustomerName = Script.BussFld1

   Balance = Script.BussFld2

   subject = Script.BussFld3

   DueDate = Script.BussFld4

   AccountID = Script.BussFld5

   Pic = "C:\logo.jpg"

   set con=CreateObject("ADODB.Connection") 'Creating a ADODB.Connection

   'Opening the Customer Table

   con.Open "TestDSN","testuser","testPwd"

   if (Err.number<>0) then

       RetValue=false

    end if
```

```
    'Checking for the number to be called against the values in the Database

   set rs=con.Execute("select PaidStatus from tblCustStatus where AccountID = '" &
AccountID & "'") 'Querying the Database


    if Err.Number<>0 or (rs.BOF=true and rs.EOF=true) then

PaidStatus = rs.Fields("PaidStatus").Value

    if (PaidStatus = 'N') then    'Not paid

               Script.MailFromAddress = "demoFromAddress@acqueon.com"

               Script.MailSubject = "Balance remainder : " & subject

               mailMessage = "Dear " & CustomerName & "," & vbCrlf & "Your credit card
               balance of Rs. " & Balance & " is due on " & DueDate & "." & vbCrlf &
               vbCrlf & "Please pay the balance to avoid the late payment fine."

               Script.EMailBody = mailMessage

               RetValue = true

               rs.Close

               con.Close

               exit function

       end if

       else

               RetValue = false

       end if

End Function
```