5.3 Outbound - Dial Rules

Bright Pattern Documentation

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Lists

Lists contain destination data for automated outbound dialing. Each list record provides information about a single destination, and typically includes customer's name, at least one telephone number, and other information specific to the dialing purpose. For example, lists used in a satisfaction survey campaign may include information about products purchased by the customers. Lists are used in outbound and blended services as discussed in section Services and Campaigns - Lists Tab.

List data is deleted from the calling list database automatically when the

- corresponding list object is deleted from configuration
- list is updated with new content via periodic import with the update policy set to *replace list data*

To work with lists, select the **Lists** option from the root menu. To import and configure a new list, click the button with the "+" sign. A list import wizard will open.

List import wizard

List Import

The list import wizard screens and properties are described as follows.

List Type screen

List type screen

Select list type

Select the method that will be used to import data to this list: a file or Salesforce.com query. For the latter, you must have a Salesforce.com integration account configured in your system.

For detailed instructions on importing data from a Salesforce.com application see sectionImporting Calling Lists and Exporting Campaign Results of the *Salesforce.com Integration Guide.*

Name and Source screen

Name and Source screen

Data source

Data source is the source of data for this list. To upload a file from a local source, select**Upload**, click **Browse**, and select the data file. You can use results of previous campaigns, filtered by disposition if necessary, as the source of your list data.

To obtain data from an external source, select the transfer protocol (*FTP* or *SFTP*), and specify the address (URL), *Username*, and *Password*.

Note that only plain text list files (.CSV or fixed width) are supported as sources for list data. This setting is specified for list type *File* only.

List name

The list name is mandatory and must be unique within the contact center. The name of the selected data source is offered as the default name.

List format

If you want the format of a list to be based on the format of one of the previously imported lists, select the desired *list format* from the drop-down menu. Using an existing list format can save you time while going through the subsequent import steps, especially the *Fields* wizard screen.

If you need to review the desired format before assigning it, close the wizard, locate the desired format in the *Format* column of the list view, select the corresponding list, and click the**view** link in the **Properties** tab.

Note that if you select an existing list format but decide to introduce some changes for the imported list (e.g., change some field names), then upon completion of the wizard, you will be prompted to save these changes as a new format.

If you wish to create a new format using the layout of the imported list, select**Create new format**. This setting is specified for list type **File** only.

Salesforce.com integration account

The Salesforce.com integration account is what will be used to obtain Salesforce.com data for this list. This setting is specified for list type Salesforce.com only.

SOQL query to select object for list

Use this field to specify the query for selecting Salesforce.com records for this calling list. The query must be written in the Salesforce Object Query Language (SOQL). Note that the records must contain object identifiers and have at least one phone number.

This setting is specified for list type Salesforce.com only. Note that there is a 30 second timeout on the Bright Pattern Contact Center side to begin receiving data from SFDC after the SOQL query is submitted.

Format Type screen (for list type *File* only)

Format Type screen

Delimited

Select *Delimited* if a character, such as comma or tab, separates each field in the imported data

First line contains field names

Select this checkbox if the first line of the imported data appears to contain column headings. Field names are case insensitive starting from version 3.13. This means field names that differ in case only refer to the same field.

Fixed width

Select this option if fields of the imported data appear to be aligned in columns with spaces between each field.

Input file encoding

The *Input file encoding* option lets you select the encoding used by the source file. Initially, the UTF-8 encoding is assumed by default. If you select another encoding during a list import, the selected encoding will become the new default for subsequent list imports.

Format Options screen (for list type *File* only)

Format Options screen

Delimiter

Select the character that is used to separate each field in the imported data. If the delimiting character is anything other than the comma, tab, or semicolon, use the **Custom** option to specify the character. When the correct delimiter is selected, the preview should show the imported data arranged as a table.

Fields screen

Fields screen

Do not import field (skip)

This field indicates whether the selected field is to be imported. Select this checkbox if the data in the selected field is not essential for any contact center operations (i.e., will not be used for dialing, analyzed in a scenario, or displayed for agents) and does not need to appear in campaign results.

Type

Specify the *type* of data that the selected field contains. If the type of data is anything other than the data types predefined in the drop-down menu, select *Other*. Note that at least one field of the imported list must have type *Phone*.

If the first row of the imported data contains column names, the wizard will try to automatically set field types according to matching column names (e.g., a column titled *State* will be set to field type *State*). You should review all name-type pairs to make sure the mapping is correct.

Possible uses of the available field types are described as follows.

Account

Account can be used for a field that contains a customer identifier. If defined, the value from this field will be stored as part of the history of all calls initiated by the corresponding calling record and can be used as a selection criterion in interaction record search. Unique account numbers can also be used as calling record keys (see below). A list can have only one field of this type.

Agent Login ID

Agent Login ID can be used to assign list records to specific agents. This may be useful, for example, for proactive contacts within established business relationships where clients might expect/prefer to be contacted by business representatives that they are familiar with. Note that such personal record assignments are used in preview campaigns only. When a list with records assigned to specific agents is used in apredictive, progressive, or automatic/IVR campaign, all such assignments will be ignored.

Caller ID

If calling records contain numbers that should be displayed as caller IDs when dialing corresponding records during campaigns, use the field type *Caller ID* for the field that contains these numbers. Use of these numbers as Caller IDs for a particular campaign is enabled by the campaign's Caller ID settings (option *From list field of type "Caller ID", otherwise default*). Note that your service provider may or may not allow use of arbitrary caller ID numbers for your outgoing calls. If use of arbitrary caller IDs is not available to you, the number specified in the calling record will be used only as a caller ID if it matches one of the access numbers assigned to your contact center; otherwise, the specified default number will be used. When using this field to specify caller IDs for your campaign, be sure to check all legal requirements and restrictions for what can be sent as a caller ID in the jurisdictions where you operate.

Company

Company can be used when calling record contains a company name.

Date/Time

If the calling list is based on customers' callback requests (opt-in callback list), your local telemarketing regulations may require that such callbacks are made within a specific number of days. In this case, the imported list will typically have information about when the callback request was made. Use the field type *Date/Time* for this information. Fields of the *Date/Time* type cannot be used to set campaign quotas.

Date/Time - schedule call at

Date/Time - schedule call at can be used to provide, during list import, information about when this record needs to be called. It can be used to define the exact moment of time when this record needs to be attempted.

Note that the call will happen as close to the specified date and time as possible; the system will make the best attempt. Safe calling hours are not ignored. If the date and time are in the past at the time of list load, the field contents are ignored.

Encrypted data

Encrypted data can be used to store sensitive information that must be stored encrypted and only be presented in clear text to the agent who will be processing the record in case of a successful call attempt. Note that the encrypted data cannot be not automatically processed by the system, and thus, may not include any information used for campaign automation, such as phone numbers, zip codes, states, or any information that is used to set campaign quotas. If you do not see the **Encrypted data** field type, the data encryption function is not enabled for your contact center by the service provider.

First name

First name is the person's first name.

Integer

Integer is intended for fields with semantically numeric data (e.g., person's age or account balance) that may be used to set a campaign quota.

Last name

Last name is a person's last name.

Other

Other can be used for fields that do not fall into any specific field type uses outlined here.

Phone

Phone should be set for fields with phone numbers that may be dialed during a campaign. A list must contain at least one field of this type.

Postal code

Postal code is a person's postal code. This must be present if the *Use safe calling hours* option is desired.

Priority

Priority can be used to indicate that the record shall be attempted as soon as possible relative to other records within the same list. This can be useful, for example, in order to give calling priority to the most recent web leads that tend to be most effective when followed up on immediately. A record will be treated as a prioritized record when its priority field is set to any value other than empty string, zero, "no", or "false". The priority setting only affects the first attempt to dial the record; for any possible subsequent attempts the prioritized record will be treated as a regular record. Priority of records can also be set to expire after a specified time period (see property *Priority expires after*).

State/Province

State/Province is a person's state/province. Either this field or the *Postal code* field must be present in the calling records in order to observe mandatory State Calling Hours.

Name

If the first line of the imported data contains column headings, these headings will be used as the default field names. Otherwise, default names *Field1*, *Field2*,..., *FieldN* will be assigned. Use this option to change the default field name if necessary. Field names are case-sensitive, which means that field names that differ in case only refer to the same field.

Required Field

Required Field indicates that the data in this field is required. If selected, the import process will not skip records that have no data in this field.

For all fields of the *Phone* type, this checkbox is preselected automatically. You can unselect it manually for any phone field that is optional. Remember, however, that at least one field of the imported list must have the type *Phone*.

For lists of the Salesforce.com type, field **ID** is preselected automatically and cannot be unselected.

Searchable Field

Searchable Field indicates this field may be searched for in the Agent Desktop application when associated with a custom Activity History field that is included in a screenpop activity form. For more information, see section Activity Forms.

The numbers are in the format for

This setting is displayed for the fields of type *Phone* only.

If all phone numbers in this field are within the USA and/or Canada, select **United States and Canada**. In this case, the numbers in this field will be processed according the following rules:

- If a number begins with “011”, it will be kept as is.
- If a number begins with “1” and has eleven digits, it will be kept as is.
- If a number does not begin with “1” and has ten digits, “1” will be prepended.
- In any other case, the record will not be imported.

If some or all numbers in this field are from countries other than the USA or Canada, select **Other countries or multiple countries**. In this case, the numbers in this field will be processed according the following rules:

- If a number begins with “+”, the leading "+" sign will be removed.
- In any other case, the number will be assumed to begin with a country code and also kept as is unless modified using the *Remove prefix* or *Default country code* settings.

Remove prefix

This setting is displayed for the fields of the type *Phone* only and can be used when the number format is set to *Other countries or multiple countries*. If phone numbers in this field contain a prefix that must be removed, specify this prefix here. Otherwise, this setting should be left blank.

Default country code

This setting is displayed for the fields of type *Phone* only and can be used when the number format is set to *Other countries or multiple countries*. By default, numbers in a field of type *Phone* are assumed to have country codes included. In this case, you can leave this field blank. Otherwise, specify the country code here; it will be automatically prepended to each number in the given field unless the number begins with “+”.

Note that a country code must be specified for campaigns with any calling hour restrictions and for campaigns where numbers are checked against DNC lists of the following types: Area Code, Geographic (Postal), and Geographic (State/Province).

Time zone

This setting is displayed for the fields of *Date/Time* type only. By default, the time in this field is assumed to be specified for the time zone indicated in the general settings of your contact center. You can use this setting to specify another the time zone for this field.

Date/Time format

This setting is displayed for the fields of *Date/Time* type only and allows you to select the format in which the date and time is specified in this field. If you cannot find a format that matches exactly the date/time pattern used in the imported list, use the editable field to specify this format manually, using the Java SimpleDateFormat conventions.

Note that campaign results report timestamps of call attempts in the following format: **MM/dd/yyyy HH:mm:ss z Z**, where **z Z** is the time zone (e.g., **11/09/2015 13:59:57 PST -0800**).

Order of prioritized records

This setting is displayed for the fields of type *Priority* only and defines the order in which prioritized records received during list updates will be attempted.

Priority expires after

This setting is displayed for the fields of type *Priority* only and specifies the time period during which records with a non-empty value of this field will be considered a prioritized record. Upon expiration, priority of these records will be lowered to normal. If you do not wish the priority of a record to expire at all, set this field to 0.

Key screen (for list type File only)

Key screen

Fields

This screen allows you to select a field, or a combination of fields, whose values will be used as keys (i.e., will uniquely identify records within the list). Only the fields that were marked as *Required* in the previous wizard step will appear as possible keys. Records with the same key values are considered duplicates, and only one of such duplicate records will appear in the imported list. Keys are also used to reference the campaign results to the original list records.

Save config only

Click this button, instead of clicking *Next*, if you wish to save only the list format (i.e., the configured field and key information without the actual data). The result will appear as a new list with zero records in the list view.

Import Complete screen

Import Complete screen

Import results

This screen provides statistics about the imported list, including the number of successfully imported records, as well as the numbers of records that have not been imported for various reasons.

Calling records that contain the same phone number in multiple fields of the*Phone* type will be successfully imported. The dialer will detect duplicate numbers while processing the list for use in a specific campaign and will only use the number in the first phone field while ignoring that number in all other phone fields of the same record. For example, if a calling record contains the same number in the field **Home Phone**, which happens to be the fourth field in the record, and in field **Mobile Phone**, which is the sixth field, the dialer will use this number according to the calling hours set for home phones. It will ignore this number when dialing mobile numbers (or when sending preview records to agents in case of a preview campaign).

Updating Lists

New lists imported via the list import wizard appear in the list view of Lists. You can update these lists manually or set up periodic automatic updates.

Manual List Update

To update a list manually, select it from the list view and click the**Add records** button at the bottom of the screen. (Note that this function is not available for lists of Salesforce.com type.) A list update wizard appears. Its screens and properties are described as follows.

Name and Source screen

List name

List name is the name of the selected list. It is read-only.

Data source

Data source is the source of data for this list. To upload a file from a local source, select**Upload**, click **Browse**, and select the data file. To obtain data from an external source, select the transport protocol (*FTP* or *SFTP*), and specify the address (URL), *Username*, and *Password*.

Note that only plain text list files (.CSV or fixed width) are supported as sources for list data. Note that the data structure of the selected data source shall correspond to the data structure of the data source used for the original import.

Update Policy screen

replace list data

Select this option if the data from the specified data source shall replace the existing list data. Note the following:

- Any campaign results that may have been associated with the existing list records will be deleted.
- Replacement of existing list data requires internal re-processing of the entire calling list. Thus, if updates with this policy are applied to a list within a running campaign, use of this list within the given campaign will be suspended until list re-processing is complete. The suspension time will depend on the list size and, for long lists, may amount to tens of minutes. Other lists associated with the same campaign will not be affected.

add list data

Select this option if the data from the specified data source shall be added to the existing list data. Note that data records whose keys match with keys of the existing records will not be imported.

Import Complete screen

Import results

This screen provides statistics about the imported list, including the number of successfully imported records, as well as the numbers of records that have not been imported for various reasons.

List Properties and Automated Updates

To view the current content of a list, set up periodic automatic updates, or view the list import/update history, select the desired list from the list view.

Lists > Properties tab

Lists screen properties

Properties tab

Name

This is the *name* of the list. List name is originally defined during the initial list import, but it can be changed at any time. The name must be unique within the contact center.

Format

Format is the name of the format that this list is based on. It is read-only. (The format is selected or defined during the initial list import.)

To review the format, click the **view** link. A new dialog window will open with description of all fields defined within this format. For more information, see description of the **Fields** screen of the List Import Wizard above. If any activity forms are mapped to lists based on this format, this view will also show the mapping between the form fields and list fields.

For lists of the Salesforce.com type, the window will also show the SOQL query that is used to extract the list records from the Salesforce.com application. While you cannot change the field composition or formatting, you can modify the data selection criteria for these fields (i.e., any condition in the *WHERE* part of the query). To do so, hover over the SOQL query and click **EDIT**. The new selection criteria will be applied upon the next list update.

Campaigns

Click **add** to associate this list with one or more campaigns. For additional configuration options related to use of the list within the associated campaign, select this campaign in the Services and Campaigns list view and open the Lists tab.

Expire records

You can set the list records to expire in a specified number of days. If a record expires before it is completed according to the regular campaign dial rules, its processing within campaign will be finished with the predefined disposition *Record Expired*.

To set the records of the given list to expire, select the checkbox, specify the *Expiration period*, and indicate the starting point from which this period will be counted:

- To count from the date when records appear in the system (either via the initial list import or subsequent list updates), select **Count expiration period since record insertion**. This expiration mechanism can be used to comply with your local telemarketing regulations that may require periodic scrubbing of calling records against national or state-wide do-not-call lists, after which any unmatched numbers are considered to be good for dialing over a certain period (e.g., 30 days for numbers added to the US National Do-Not-Call Registry or 15 days for numbers ported to mobile phones).
- To count from the date specified in the calling record itself, select **Count expiration period using date in record**. This expiration mechanism can be used for calling lists that are based on customers' callback requests (opt-in callback lists) if your local telemarketing regulations require that such callbacks are made within a specific number of days.

Expiration period

Expiration period is the number days in which the records of this list expire. See the description of the **Expire records** setting for more information.

Expiration field

Expiration field is the field of the calling list that will be used to determine when the callback request was made, which is necessary in order to calculate when it expires. Only fields of type **Date/Time** are available for selection as expiration fields. This setting is essential if you have selected the **Count expiration using date in record** option. See the description of the **Expire records** setting for more information.

Periodic Import

To set up automatic periodic updates for this list, click **edit**.

In the dialog that appears:

1. Specify the protocol (*FTP* or *SFTP*), *URL with file name*, *FTP Username*, and *FTP Password*; this setting is specified for lists of *File* type only.
2. Select the *Start date and time* of the first update and specify the desired *Import interval*.
3. Select the desired *Update Policy*. (Note that the *replace list data* policy may suspend use of this list within a running campaign for the time it takes to re-process the list.) This setting is specified for lists of the *File* type only.
4. Click **OK**.
5. Once these parameters are defined, select the *Enabled* checkbox to activate periodic import.

For lists of the *Salesforce.com* type, new records matching the original SOQL query will be added to the list during each update, while any records that may have been removed from Salesforce will be disabled in the list. If there are campaign results available for such disabled records, they will be preserved.

For lists of the 'Salesforce.com *type, there is a 30-second timeout on the Bright Pattern Contact Center side to begin receiving data from SFDC after the SOQL query is submitted.*

You can also run import with the above settings at any time by clicking **Run import now**.

Contents tab

Lists > Contents tab

List pane

The *List pane* shows the entire content of the list. It is read-only.

Record pane

The *Record pane* shows the content of the record selected from the List pane. It is read-only.

Timestamp

Timestamp is the timestamp of the operation.

Errors is the total number of records that were not imported due to various errors (missing required fields, duplicate keys, incorrect format).

Operator

Operator is the username of the user who performed this operation.

Comment

Comment is the operation result.

Log Tab

Timestamp

Time stamp of the operation

File

Name of the list data source file

Direction

Type of the operation (*IN* for import/updates, *EXP* for export of campaign results)

Number of records

Total number of successfully imported/exported records during this operation

Errors

Total number of records that were not imported due to various errors (missing required fields, duplicate keys, incorrect format)

Operator

Username of the user who performed this operation

Comment

Operation result

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Lists

Lists contain destination data for automated outbound dialing. Each list record provides information about a single destination, and typically includes customer's name, at least one telephone number, and other information specific to the dialing purpose. For example, lists used in a satisfaction survey campaign may include information about products purchased by the customers. Lists are used in outbound and blended services as discussed in section Services and Campaigns - Lists Tab.

List data is deleted from the calling list database automatically when the

- corresponding list object is deleted from configuration
- list is updated with new content via periodic import with the update policy set to *replace list data*

To work with lists, select the **Lists** option from the root menu. To import and configure a new list, click the button with the "+" sign. A list import wizard will open.

List import wizard

List Import

The list import wizard screens and properties are described as follows.

List Type screen

List type screen

Select list type

Select the method that will be used to import data to this list: a file or Salesforce.com query. For the latter, you must have a Salesforce.com integration account configured in your system.

For detailed instructions on importing data from a Salesforce.com application see sectionImporting Calling Lists and Exporting Campaign Results of the *Salesforce.com Integration Guide*.

Name and Source screen

Name and Source screen

Data source

Data source is the source of data for this list. To upload a file from a local source, select**Upload**, click **Browse**, and select the data file. You can use results of previous campaigns, filtered by disposition if necessary, as the source of your list data.

To obtain data from an external source, select the transfer protocol (*FTP* or *SFTP*), and specify the address (URL), *Username*, and *Password*.

Note that only plain text list files (.CSV or fixed width) are supported as sources for list data. This setting is specified for list type *File* only.

List name

The list name is mandatory and must be unique within the contact center. The name of the selected data source is offered as the default name.

List format

If you want the format of a list to be based on the format of one of the previously imported lists, select the desired *list format* from the drop-down menu. Using an existing list format can save you time while going through the subsequent import steps, especially the *Fields* wizard screen.

If you need to review the desired format before assigning it, close the wizard, locate the desired format in the *Format* column of the list view, select the corresponding list, and click the**view** link in the **Properties** tab.

Note that if you select an existing list format but decide to introduce some changes for the imported list (e.g., change some field names), then upon completion of the wizard, you will be prompted to save these changes as a new format.

If you wish to create a new format using the layout of the imported list, select**Create new format**. This setting is specified for list type **File** only.

Salesforce.com integration account

The Salesforce.com integration account is what will be used to obtain Salesforce.com data for this list. This setting is specified for list type Salesforce.com only.

SOQL query to select object for list

Use this field to specify the query for selecting Salesforce.com records for this calling list. The query must be written in the Salesforce Object Query Language (SOQL). Note that the records must contain object identifiers and have at least one phone number.

This setting is specified for list type Salesforce.com only. Note that there is a 30 second timeout on the Bright Pattern Contact Center side to begin receiving data from SFDC after the SOQL query is submitted.

Format Type screen (for list type *File* only)

Format Type screen

Delimited

Select *Delimited* if a character, such as comma or tab, separates each field in the imported data

First line contains field names

Select this checkbox if the first line of the imported data appears to contain column headings. Field names are case insensitive starting from version 3.13. This means field names that differ in case only refer to the same field.

Fixed width

Select this option if fields of the imported data appear to be aligned in columns with spaces between each field.

Input file encoding

The *Input file encoding* option lets you select the encoding used by the source file. Initially, the UTF-8 encoding is assumed by default. If you select another encoding during a list import, the selected encoding will become the new default for subsequent list imports.

Format Options screen (for list type *File* only)

Format Options screen

Delimiter

Select the character that is used to separate each field in the imported data. If the delimiting character is anything other than the comma, tab, or semicolon, use the **Custom** option to specify the character. When the correct delimiter is selected, the preview should show the imported data arranged as a table.

Fields screen

Fields screen

Do not import field (skip)

This field indicates whether the selected field is to be imported. Select this checkbox if the data in the selected field is not essential for any contact center operations (i.e., will not be used for dialing, analyzed in a scenario, or displayed for agents) and does not need to appear in campaign results.

Type

Specify the *type* of data that the selected field contains. If the type of data is anything other than the data types predefined in the drop-down menu, select *Other*. Note that at least one field of the imported list must have type *Phone*.

If the first row of the imported data contains column names, the wizard will try to automatically set field types according to matching column names (e.g., a column titled *State* will be set to field type *State*). You should review all name-type pairs to make sure the mapping is correct.

Possible uses of the available field types are described as follows.

Account

Account can be used for a field that contains a customer identifier. If defined, the value from this field will be stored as part of the history of all calls initiated by the corresponding calling record and can be used as a selection criterion in interaction record search. Unique account numbers can also be used as calling record keys (see below). A list can have only one field of this type.

Agent Login ID

Agent Login ID can be used to assign list records to specific agents. This may be useful, for example, for proactive contacts within established business relationships where clients might expect/prefer to be contacted by business representatives that they are familiar with. Note that such personal record assignments are used in preview campaigns only. When a list with records assigned to specific agents is used in apredictive, progressive, or automatic/IVR campaign, all such assignments will be ignored.

Caller ID

If calling records contain numbers that should be displayed as caller IDs when dialing corresponding records during campaigns, use the field type *Caller ID* for the field that contains these numbers. Use of these numbers as Caller IDs for a particular campaign is enabled by the campaign's Caller ID settings (option *From list field of type "Caller ID", otherwise default*). Note that your service provider may or may not allow use of arbitrary caller ID numbers for your outgoing calls. If use of arbitrary caller IDs is not available to you, the number specified in the calling record will be used only as a caller ID if it matches one of the access numbers assigned to your contact center; otherwise, the specified default number will be used. When using this field to specify caller IDs for your campaign, be sure to check all legal requirements and restrictions for what can be sent as a caller ID in the jurisdictions where you operate.

Company

Company can be used when calling record contains a company name.

Date/Time

If the calling list is based on customers' callback requests (opt-in callback list), your local telemarketing regulations may require that such callbacks are made within a specific number of days. In this case, the imported list will typically have information about when the callback request was made. Use the field type *Date/Time* for this information. Fields of the *Date/Time* type cannot be used to set campaign quotas.

Date/Time - schedule call at

Date/Time - schedule call at can be used to provide, during list import, information about when this record needs to be called. It can be used to define the exact moment of time when this record needs to be attempted.

Note that the call will happen as close to the specified date and time as possible; the system will make the best attempt. Safe calling hours are not ignored. If the date and time are in the past at the time of list load, the field contents are ignored.

Encrypted data

Encrypted data can be used to store sensitive information that must be stored encrypted and only be presented in clear text to the agent who will be processing the record in case of a successful call attempt. Note that the encrypted data cannot be not automatically processed by the system, and thus, may not include any information used for campaign automation, such as phone numbers, zip codes, states, or any information that is used to set campaign quotas. If you do not see the **Encrypted data** field type, the data encryption function is not enabled for your contact center by the service provider.

First name

First name is the person's first name.

Integer

Integer is intended for fields with semantically numeric data (e.g., person's age or account balance) that may be used to set a campaign quota.

Last name

Last name is a person's last name.

Other

Other can be used for fields that do not fall into any specific field type uses outlined here.

Phone

Phone should be set for fields with phone numbers that may be dialed during a campaign. A list must contain at least one field of this type.

Postal code

Postal code is a person's postal code. This must be present if the *Use safe calling hours* option is desired.

Priority

Priority can be used to indicate that the record shall be attempted as soon as possible relative to other records within the same list. This can be useful, for example, in order to give calling priority to the most recent web leads that tend to be most effective when followed up on immediately. A record will be treated as a prioritized record when its priority field is set to any value other than empty string, zero, "no", or "false". The priority setting only affects the first attempt to dial the record; for any possible subsequent attempts the prioritized record will be treated as a regular record. Priority of records can also be set to expire after a specified time period (see property *Priority expires after*).

State/Province

State/Province is a person's state/province. Either this field or the *Postal code* field must be present in the calling records in order to observe mandatory State Calling Hours.

Name

If the first line of the imported data contains column headings, these headings will be used as the default field names. Otherwise, default names *Field1*, *Field2*,..., *FieldN* will be assigned. Use this option to change the default field name if necessary. Field names are case-sensitive, which means that field names that differ in case only refer to the same field.

Required Field

Required Field indicates that the data in this field is required. If selected, the import process will not skip records that have no data in this field.

For all fields of the *Phone* type, this checkbox is preselected automatically. You can unselect it manually for any phone field that is optional. Remember, however, that at least one field of the imported list must have the type *Phone*.

For lists of the Salesforce.com type, field **ID** is preselected automatically and cannot be unselected.

Searchable Field

Searchable Field indicates this field may be searched for in the Agent Desktop application when associated with a custom Activity History field that is included in a screenpop activity form. For more information, see section Activity Forms.

The numbers are in the format for

This setting is displayed for the fields of type *Phone* only.

If all phone numbers in this field are within the USA and/or Canada, select **United States and Canada**. In this case, the numbers in this field will be processed according the following rules:

- If a number begins with “011”, it will be kept as is.
- If a number begins with “1” and has eleven digits, it will be kept as is.
- If a number does not begin with “1” and has ten digits, “1” will be prepended.
- In any other case, the record will not be imported.

If some or all numbers in this field are from countries other than the USA or Canada, select **Other countries or multiple countries**. In this case, the numbers in this field will be processed according the following rules:

- If a number begins with “+”, the leading "+" sign will be removed.
- In any other case, the number will be assumed to begin with a country code and also kept as is unless modified using the *Remove prefix* or *Default country code* settings.

Remove prefix

This setting is displayed for the fields of the type *Phone* only and can be used when the number format is set to *Other countries or multiple countries*. If phone numbers in this field contain a prefix that must be removed, specify this prefix here. Otherwise, this setting should be left blank.

Default country code

This setting is displayed for the fields of type *Phone* only and can be used when the number format is set to *Other countries or multiple countries*. By default, numbers in a field of type *Phone* are assumed to have country codes included. In this case, you can leave this field blank. Otherwise, specify the country code here; it will be automatically prepended to each number in the given field unless the number begins with “+”.

Note that a country code must be specified for campaigns with any calling hour restrictions and for campaigns where numbers are checked against DNC lists of the following types: Area Code, Geographic (Postal), and Geographic (State/Province).

Time zone

This setting is displayed for the fields of *Date/Time* type only. By default, the time in this field is assumed to be specified for the time zone indicated in the general settings of your contact center. You can use this setting to specify another the time zone for this field.

Date/Time format

This setting is displayed for the fields of *Date/Time* type only and allows you to select the format in which the date and time is specified in this field. If you cannot find a format that matches exactly the date/time pattern used in the imported list, use the editable field to specify this format manually, using the Java SimpleDateFormat conventions.

Note that campaign results report timestamps of call attempts in the following format: **MM/dd/yyyy HH:mm:ss z Z**, where **z Z** is the time zone (e.g., **11/09/2015 13:59:57 PST -0800**).

Order of prioritized records

This setting is displayed for the fields of type *Priority* only and defines the order in which prioritized records received during list updates will be attempted.

Priority expires after

This setting is displayed for the fields of type *Priority* only and specifies the time period during which records with a non-empty value of this field will be considered a prioritized record. Upon expiration, priority of these records will be lowered to normal. If you do not wish the priority of a record to expire at all, set this field to 0.

Key screen (for list type File only)

Key screen

Fields

This screen allows you to select a field, or a combination of fields, whose values will be used as keys (i.e., will uniquely identify records within the list). Only the fields that were marked as *Required* in the previous wizard step will appear as possible keys. Records with the same key values are considered duplicates, and only one of such duplicate records will appear in the imported list. Keys are also used to reference the campaign results to the original list records.

Save config only

Click this button, instead of clicking *Next*, if you wish to save only the list format (i.e., the configured field and key information without the actual data). The result will appear as a new list with zero records in the list view.

Import Complete screen

Import Complete screen

Import results

This screen provides statistics about the imported list, including the number of successfully imported records, as well as the numbers of records that have not been imported for various reasons.

Calling records that contain the same phone number in multiple fields of the*Phone* type will be successfully imported. The dialer will detect duplicate numbers while processing the list for use in a specific campaign and will only use the number in the first phone field while ignoring that number in all other phone fields of the same record. For example, if a calling record contains the same number in the field **Home Phone**, which happens to be the fourth field in the record, and in field **Mobile Phone**, which is the sixth field, the dialer will use this number according to the [calling hours]() set for home phones. It will ignore this number when dialing mobile numbers (or when sending preview records to agents in case of a preview campaign).

Updating Lists

New lists imported via the list import wizard appear in the list view of Lists. You can update these lists manually or set up periodic automatic updates.

Manual List Update

To update a list manually, select it from the list view and click the**Add records** button at the bottom of the screen. (Note that this function is not available for lists of Salesforce.com type.) A list update wizard appears. Its screens and properties are described as follows.

Name and Source screen

List name

List name is the name of the selected list. It is read-only.

Data source

Data source is the source of data for this list. To upload a file from a local source, select**Upload**, click **Browse**, and select the data file. To obtain data from an external source, select the transport protocol (*FTP* or *SFTP*), and specify the address (URL), *Username*, and *Password*.

Note that only plain text list files (.CSV or fixed width) are supported as sources for list data. Note that the data structure of the selected data source shall correspond to the data structure of the data source used for the original import.

Update Policy screen

replace list data

Select this option if the data from the specified data source shall replace the existing list data. Note the following:

- Any [campaign results]() that may have been associated with the existing list records will be deleted.
- Replacement of existing list data requires internal re-processing of the entire calling list. Thus, if updates with this policy are applied to a list within a running campaign, use of this list within the given campaign will be suspended until list re-processing is complete. The suspension time will depend on the list size and, for long lists, may amount to tens of minutes. Other lists associated with the same campaign will not be affected.

add list data

Select this option if the data from the specified data source shall be added to the existing list data. Note that data records whose keys match with keys of the existing records will not be imported.

Import Complete screen

Import results

This screen provides statistics about the imported list, including the number of successfully imported records, as well as the numbers of records that have not been imported for various reasons.

List Properties and Automated Updates

To view the current content of a list, set up periodic automatic updates, or view the list import/update history, select the desired list from the list view.

Lists > Properties tab

Lists screen properties

Properties tab

Name

This is the *name* of the list. List name is originally defined during the initial list import, but it can be changed at any time. The name must be unique within the contact center.

Format

Format is the name of the format that this list is based on. It is read-only. (The format is selected or defined during the initial list import.)

To review the format, click the **view** link. A new dialog window will open with description of all fields defined within this format. For more information, see description of the **Fields** screen of the List Import Wizard above. If any activity forms are mapped to lists based on this format, this view will also show the mapping between the form fields and list fields.

For lists of the Salesforce.com type, the window will also show the SOQL query that is used to extract the list records from the Salesforce.com application. While you cannot change the field composition or formatting, you can modify the data selection criteria for these fields (i.e., any condition in the *WHERE* part of the query). To do so, hover over the SOQL query and click **EDIT**. The new selection criteria will be applied upon the next list update.

Campaigns

Click **add** to associate this list with one or more campaigns. For additional configuration options related to use of the list within the associated campaign, select this campaign in the Services and Campaigns list view and open the Lists tab.

Expire records

You can set the list records to expire in a specified number of days. If a record expires before it is completed according to the regular campaign dial rules, its processing within campaign will be finished with the predefined disposition *Record Expired*.

To set the records of the given list to expire, select the checkbox, specify the *Expiration period*, and indicate the starting point from which this period will be counted:

- To count from the date when records appear in the system (either via the initial list import or subsequent list updates), select **Count expiration period since record insertion**. This expiration mechanism can be used to comply with your local telemarketing regulations that may require periodic scrubbing of calling records against national or state-wide do-not-call lists, after which any unmatched numbers are considered to be good for dialing over a certain period (e.g., 30 days for numbers added to the US National Do-Not-Call Registry or 15 days for numbers ported to mobile phones).
- To count from the date specified in the calling record itself, select **Count expiration period using date in record**. This expiration mechanism can be used for calling lists that are based on customers’ callback requests (opt-in callback lists) if your local telemarketing regulations require that such callbacks are made within a specific number of days.

Expiration period

Expiration period is the number days in which the records of this list expire. See the description of the **Expire records** setting for more information.

Expiration field

Expiration field is the field of the calling list that will be used to determine when the callback request was made, which is necessary in order to calculate when it expires. Only fields of type **Date/Time** are available for selection as expiration fields. This setting is essential if you have selected the **Count expiration using date in record** option. See the description of the **Expire records** setting for more information.

Periodic Import

To set up automatic periodic updates for this list, click **edit**.

In the dialog that appears:

1. Specify the protocol (*FTP* or *SFTP*), *URL with file name*, *FTP Username*, and *FTP Password*; this setting is specified for lists of *File* type only.
2. Select the *Start date and time* of the first update and specify the desired *Import interval*.
3. Select the desired *Update Policy*. (Note that the *replace list data* policy may suspend use of this list within a running campaign for the time it takes to re-process the list.) This setting is specified for lists of the *File* type only.
4. Click **OK**.
5. Once these parameters are defined, select the *Enabled* checkbox to activate periodic import.

For lists of the *Salesforce.com* type, new records matching the original SOQL query will be added to the list during each update, while any records that may have been removed from Salesforce will be disabled in the list. If there are campaign results available for such disabled records, they will be preserved.

For lists of the 'Salesforce.com *type, there is a 30-second timeout on the Bright Pattern Contact Center side to begin receiving data from SFDC after the SOQL query is submitted.*

You can also run import with the above settings at any time by clicking **Run import now**.

Contents tab

Lists > Contents tab

List pane

The *List pane* shows the entire content of the list. It is read-only.

Record pane

The *Record pane* shows the content of the record selected from the List pane. It is read-only.

Timestamp

Timestamp is the timestamp of the operation.

Errors is the total number of records that were not imported due to various errors (missing required fields, duplicate keys, incorrect format).

Operator

Operator is the username of the user who performed this operation.

Comment

Comment is the operation result.

Log Tab

Timestamp

Time stamp of the operation

File

Name of the list data source file

Direction

Type of the operation (*IN* for import/updates, *EXP* for export of campaign results)

Number of records

Total number of successfully imported/exported records during this operation

Errors

Total number of records that were not imported due to various errors (missing required fields, duplicate keys, incorrect format)

Operator

Username of the user who performed this operation

Comment

Operation result

1. REDIRECT [5.3:Contact-center-administrator-guide/ServicesandCampaigns/ListsTab]

1. REDIRECT [5.3:Contact-center-administrator-guide/ServicesandCampaigns/DispositionsTab]

Results Tab

The *Results* tab provides access to settings related to the export of campaign results as well as the export of call recordings for voice services and chat transcripts for chat services.

Results tab

Campaign results are stored in the calling list database and can be downloaded manually in .CSV format or exported periodically to designated network locations.

Campaign results are archived into .ZIP files when one of the following events occurs:

- The list is deleted from configuration.
- The list is removed from the campaign.
- The list is updated with new content via periodic import with theupdate policy set to *replace list data*.

Archived campaign results are listed in the *Archive* tab and are available for manual download only.

Note that campaign results are permanently deleted when the campaign itself is deleted.

Storage of recordings is typically defined by the terms and conditions of your service contract. Expired recordings are deleted automatically.

Before configuring the export of recordings, consider the bandwidth and amount of disk space that may be required to transfer and store all of the exported voice files. As a general guideline, use 5.7 MB per agent per working hour to calculate the necessary disk space. Note that some restrictions may be imposed at the service provider level on the hours during which export may take place (see property *Window*) and bandwidth allocated for the export tasks.

Note that if your audio files and/or chat transcripts are encrypted at the time of recording according to your encryption settings, they will be decrypted for export.

Settings

Results tab configuration settings are organized by export type: Periodic Recording Export Jobs, One-time Campaign Results Download, Periodic Export Jobs, and Periodic Salesforce.com Export Jobs. Settings for each type are described as follows.

Periodic Recording Export Jobs

Periodic Recording Export Jobs allows you to configure multiple export jobs for call recordings of this service or campaign. Each export job can have its own schedule, destination, file name format, and a set of filters.

Click **add** to specify a new periodic export job. The following dialog box will pop up.

Note that if your recordings are encrypted while they are stored in the Bright Pattern platform, they will be un-encrypted for export.

Periodic Export of Recordings dialog window

Name

Name is the name of this export job. This name will appear in the list of periodic tasks. See section*Tasks* for more information.

Enabled

Select the *Enabled* checkbox to activate this export job.

Voice signature only

Select the *Voice signature only* checkbox if the operation shall export only recordings that contain voice signatures.

Dispositions

Using *Dispositions*, export recordings of calls that were dispositioned in a specific way, and select the corresponding disposition(s). To export recordings for all calls regardless of their dispositions, select**All**.

For outbound services, note that recordings for some of the unsuccessful call attempts may not be available unless the *Record CPA phase of call attempts* option is selected for the given campaign.

Recording completed after

The *Recording completed after* setting allows you to specify the start time and date from which the recordings will be exported. Upon completion of the initial and each subsequent task export task, this parameter will be updated automatically to show the date and time of the last exported recording. The next export task will begin with the chronological next recording that satisfies the selection criteria (i.e., service, disposition, etc.).

Daily export time window

Daily export time window is the time window during which export of recordings will take place. This parameter is specified at the service provider level and will appear as read-only.

Use exported files for playback in interaction search

When checked, enables the use of Amazon S3 recordings for playback in interaction records even after your contact center's configured retention interval has passed. If multiple exports are made of the same recordings to different S3 locations and all exports have this option enabled, the recordings will be played back from the location of the last export.

Note: Playback in interaction records will work as long as detailed records in the historical database are preserved and S3 recordings are kept.

This setting only appears when the Amazon AWS protocol is selected as the export method (see section*Protocol* below).

Recordings files folder FTP URL

Recordings files folder FTP URL is where one specifies the FTP site folder where the recordings should be exported.

Recording file name

Recording file name is the specified format of the recording file name and subfolder structure. By default, at the designated network location, exported files are arranged in folders titled *recordings/[date]/[hour]* corresponding to the date and the hours when the calls started. The default recording file name consists of the call start date/time, phone number of the call party opposite to the agent, username of the last agent to handle this call, and a global unique identifier generated by the system for this recording.

To modify the file name and/or folder structure, click the current format. The current format will appear in an editable field. You can delete any of the current file name components or insert new ones. To add a new component to the current format, set the cursor to the desired place in the file name, click the **Insert placeholder** button, and select the desired component from the drop-down menu. For descriptions of the available file name components, see section Recordings Details Format of the *Reporting Reference Guide*.

A file name example corresponding to the currently selected format will be displayed under the editable field.

Recording CSV file name

Recording CSV file name is the specified format of the recording details file name.

For each instance of a periodic recordings export, the system also generates a data file. The file is exported to the same network location in the CSV format and contains details of the corresponding calls, which may facilitate searches for specific recordings once they have been exported out of the system. For more information about the **content** of this file, see section Recordings Details Format of the *ServicePattern Reporting Reference Guide*.

The default data file name is *recordings_details* for voice and *transcripts_details* for chat with the date and time of export added to it (e.g., *recordings_details_$(currentDate)_$(currentTime).csv*). **Note**: The following variables may be included in the file name:

- $(currentDate)
- $(currentTime)
- $(periodEndDate)

If you modify the name of the file to include *$(periodEndDate)*, note that it is the timestamp of the last interaction in the exported batch (e.g., *recordings_details_$(periodEndDate)*). If there were no interactions in the given export period, the value of *$(periodEndDate)* will coincide with the end of the export interval itself. If you use this variable in the file name, note that if there are days when your contact center is closed, the names of the data files produced for that day and the following (working) day may have the same date and differ by the time component only.

Protocol

Protocol specifies the export method. In all three methods, if the recordings are stored encrypted, they will be un-encrypted for export.

Note that export to AWS must be explicitly enabled by your service provider and configured via Integration Accounts. For all three methods, the exported recordings will continue to be stored and available for playback via Bright Pattern for the recordings storage time agreed upon with your service provider. After the recordings have been deleted from the local storage:

- Recordings exported via FTP/SFTP will no longer be accessible via Bright Pattern.
- Recordings exported to Amazon AWS will continue to be accessible via Bright Pattern on demand for the detailed records storage time agreed upon with your service provider.

Username

Username is the specified FTP username.

Password

Password is the specified FTP password.

Test connection

The *Test connection* button is used to test the FTP connection with the supplied credentials.

One-time Campaign Results Download

This setting allows you to download campaign results locally in the .CSV format. To download, click the **Download now** button, specify the download settings, and click **Export**. The following dialog box will pop up.

Export Campaign Results

Lists

Select the lists whose records the downloaded file should contain.

Dispositions

If you would like to download records that were dispositioned in a specific way, select the corresponding disposition(s) here. To download results for all records regardless of their dispositions, select **All**.

Format

Format is where you indicate whether the downloaded file shall contain only the last result for each completed record (**simple**), or whether it should include results of all dialing attempts (**detailed**).

For detailed results, specify whether the downloaded list shall contain all call attempts for the records that were completed within the requested time frame or only the call attempts that were actually made within that time frame.

For specification of campaign result formats, see sections SimpleFormat and Detailed Format of the *Reporting Reference Guide*.

Between

By default, the downloaded file will contain all records since the last download. Use the *Between* setting to limit the download to contain only information about the records that were closed within a specific time interval.

Timezone

Set the *timezone* for the records to be exported.

Compress file

Selecting the *Compress file* checkbox will download results in a .ZIP file.

Periodic Export Jobs

Periodic Export Jobs allows you to configure multiple jobs for automated export of campaign results via FTP in the .CSV format. Each export job can have its own schedule, destination, and set of filters. Click **add** to specify a new periodic export job. The following dialog box will pop up. Fields shown in red are required fields.

Edit Export Parameters

Name

Name is the name of this export job. This name will appear in thelist of periodic tasks.

Enabled

Selecting the *Enabled* checkbox will activate this export job.

Lists

Select the *lists* whose records the exported results should contain.

Dispositions

If you would like to export records that were dispositioned in a specific way, select the corresponding disposition(s) here. To export results for all records regardless of their dispositions, select **All**.

Format

Format is the specified format of the exported file. Indicate whether the exported file should contain only the last result for each completed record (**simple**), or whether it should include the results of all dialing attempts (**detailed**).

For detailed results, specify whether the exported list should contain all call attempts for the records that were completed within the requested time frame or only the call attempts that were actually made within that time frame.

For specification of campaign result formats, see sections SimpleFormat and Detailed Format of the *Reporting Reference Guide*.

Start date and time

This is the specified start date and time of the periodic export.

Export interval

Export interval is the specified frequency for the results to be exported. The minimum update period is

- 1 hour for the **simple** and **detailed** (records and all call attempts) export options
- 15 minutes for the **detailed** (only call attempts performed in timeframe) export option

FTP URL with file name

FTP URL with file name is the specified FTP site and the name of the file to which the results should be exported. The date and time of export will be automatically appended to the file name for each export instance.

Protocol

Protocol is the specified transfer protocol (FTP or SFTP).

FTP username

FTP username is the specified FTP username.

FTP password

FTP password is the specified FTP password.

Test connection

The *Test connection* button is used to test the FTP connection with the supplied credentials.

Periodic Salesforce.com Export Jobs

Periodic Salesforce.com Export Jobs allows you to configure multiple export jobs for automated creation of Salesforce.com objects according to the campaign results. For more information, see section Importing Calling Lists and Exporting Campaign Results of the *Salesforce.com Integration Guide*.

Each export job can have its own schedule, destination, and a set of filters. Click **add** to specify a new periodic export job. The following dialog box will pop up. Fields shown in red are required fields.

Edit Salesforce.com Export Parameters

Name

Name is the name of this export job. This name will appear in the[list of periodic tasks].

Enabled

When selected, the *Enabled* checkbox will activate this export job.

Lists

Select the *lists* whose records the exported results shall contain.

Dispositions

If you would like to export records that were dispositioned in a specific way, select the corresponding[disposition(s)] here. To export results for all records regardless of their dispositions, select **All**.

Format

Format is the specified format of the exported file. Indicate whether the exported file shall contain only the last result for each completed record (**simple**), or whether it should include results of all dialing attempts (**detailed**).

For specification of campaign result formats, see sections SimpleFormat and Documentation:ServicePattern:reporting-reference-guide:DetailedFormat|Detailed Format]] of the *Reporting Reference Guide*.

Start date and time

This is the specified *start date and time* of the periodic export.

Export interval

Export interval is the specified frequency for the results to be exported. The minimum interval is 15 minutes.

Salesforce.com integration account

Salesforce.com integration account is the integration account that will be used to access the Salesforce.com records to be updated.

Salesforce.com object

This is the *Salesforce.com object* that will be updated using the results of this campaign.

Map fields

Use the *Map fields* button to map Bright Pattern Contact Center campaign result fields to the properties of the specified Salesforce.com object.

For specification of campaign result formats, see sections SimpleFormat and Detailed Format of the *Reporting Reference Guide*.

Test by creating object

Click this button to create a test *Salesforce.com object* according to the mapping you specified using the *Map fields* button. Check your Salesforce.com application to make sure the object has been created.

Interactions Erasing

To support compliance with various regulations related to data ownership and privacy, such as GDPR, Bright Pattern allows for the manual erasure of data that is stored in interaction records for voice recordings, voice recording transcripts, chat transcripts, email messages, screen recordings, and other such interaction content.

The ability to remove sensitive data from interaction records is enabled for users with the Security Administration privilege "Can edit and erase interaction records."

System administrators with the privilege to edit and erase interaction records can erase content for specific services and campaigns by using the *Interactions Erasing* feature in the *Services & Campaigns* Results tab. Note that to erase any content, you must provide a reason.

How to Erase Interaction Content

1. Go to *Services & Campaigns* and select the desired service or campaign from the list.

2. Click the **Results** tab and click **Start erasing**.

Results > Interactions erasing

3. The *Erase interaction* dialog will appear.

Erase interaction dialog

4. Select the *items to erase*, choosing from the following options: Voice recording, Transcript of voice recording, Chat transcript, Email message, and Screen recording.

5. In the *From date* field, specify the date of the interaction to be erased.

6. In the *Reason* field, document the reason for erasing the content. Note that this field is mandatory.

7. Click **Erase**.

8. A warning dialog will inform you that *The requested operation will irrevocably destroy the [recording/transcript/message body] of selected interaction(s)*. To proceed, click **Erase**.

A warning message appears

The erase action will be recorded in your contact center's audit log.

1. REDIRECT 5.3:Agent-guide/Tutorials/OutboundCampaigns/HowtoRescheduleaCallAttempt

1. REDIRECT 5.3:Contact-center-administrator-guide/ServicesandCampaigns/Outbound-CallingHours

1. REDIRECT 5.3:Agent-guide/Tutorials/OutboundCampaigns/HowtoRescheduleaCallAttempt