

# 5.3 Outbound Tab

## Bright Pattern Documentation

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# Outbound - General

The following general campaign settings are configured in the *General* section of the Services and Campaigns [Outbound tab](#).

## General Settings



Outbound campaign general settings

## Type

This is the type of campaign. There are four different campaign types from which to choose.

- In campaigns of the *Preview* type, the calling records are submitted to the agents participating in the campaign. The agents review record information, dial destination numbers, and monitor call progress. Additionally, this type of campaign allows agents to be reserved for a requested callback without indication to the agent.
- In campaigns of the *Progressive* type, the system automatically dials numbers from list records according to a fixed (preconfigured) dialing rate, monitors call progress, and connects successful (answered) call attempts to available agents.
- In campaigns of the *Predictive* type, the system automatically dials numbers from list records according to currently optimal dialing rates, monitors call progress, and connects successful (answered) call attempts to available agents. The dialing rate is optimized to maintain the desired agent occupancy based on the statistical analysis of outcomes of most recent dialing attempts.
- In campaigns of the *Automatic (IVR)* type, the system automatically dials numbers from list records, monitors call progress, and connects successful (answered) call attempts to a prerecorded interactive voice response (IVR) message. Note that because agents are not involved in campaigns of this type, it may require different kind of license and may have to be explicitly enabled for you by your service provider.

Note that the definition of some of the subsequent campaign properties will depend on the selected campaign type.

## Enabled

*Enabled* indicates the current state of the campaign. By default, the campaign is disabled and normally it should remain in this state until it is completely configured. Completeness of campaign configuration can be verified via the [Diagnostics page](#). After the campaign has been completely configured, select the *Enabled* checkbox to indicate that it is ready to run.

Campaigns can be disabled again when they are no longer active but have to remain in configuration to ensure availability of campaign results. Note that disabling of campaigns is always a manual operation.

**Note:** For [blended services](#), you should keep the outbound portion of a service enabled at all times, even during the periods without any outbound activity. If you disable the outbound portion, [dispositions](#) of the possible callbacks made to the campaign caller ID may not be processed correctly. This may result in repeated attempts to contact customers who are not supposed to be contacted again within the given campaign (e.g., accepted the campaign offer or requested not to be called again). If you need to prevent the outbound portion of a blended service from making calls, remove all of its [calling hours](#).

## Status

*Status* shows whether the outbound campaign has started or if it is stopped (i.e., ready to run). Click **Start** or **Stop** to change the status of the outbound campaign.

## Start / Stop Automation

After the campaign has been enabled, it can be started and stopped manually at any time using these buttons.

Note that a campaign also can be [started and stopped manually](#) from the Agent Desktop application by a user designated as an [operator](#) for this campaign.

In addition, the campaign can be started and stopped automatically using the combination of the *From/Until* and *using hours of operation* settings as described below.

## From

*From* indicates the moment from which this campaign can be started automatically based on the *service hours of operation* defined in [the Properties tab](#).

If specified, the campaign will start automatically at the specified time provided that this time is within the specified service hours of operation. If the specified time is outside of the service hours, the campaign will start automatically at the nearest service opening time following the specified campaign start time.

Note that this parameter controls automatic campaign start only. Even if it is defined, the campaign can still be started earlier [manually](#).

## using hours of operation

By default, the campaign will be run automatically according to the *hours of operation* specified in [the Properties tab](#) for the given outbound service. If you click this link, you will be taken to the tab where you can modify the service hours.

Note that this schedule reflects the time when the agents of the associated teams will be expected to handle interactions of the given campaign. This schedule is normally defined for the time zone where your contact center is located. The actual calling schedules for various types of phones and other possible time-related calling restrictions are defined in the [Calling Hours page](#) relative to the time zone of destination phone numbers.

## Until

*Until* indicates the moment when this campaign will be terminated automatically even if processing of some of the calling records has not been finished or attempted. This setting will not affect the campaign-related calls that may be in progress at the specified time.

Note that this parameter controls automatic campaign termination only. Even if it is defined, the campaign can still be [started or resumed manually](#) later.

## Campaign link group

Campaigns of the same type with the same [hours of operation](#), and same [assigned agent teams](#) can be linked together so that, when processing of all records of one campaign is finished, the next campaign in the group will be started automatically.

To associate this campaign with an existing group select the group from the list. If there are other campaigns associated with the selected list, the system will ask you to confirm that the type of this campaign, its hours of operation, assigned teams, and skills will be redefined to match the corresponding settings of campaigns already in the group.

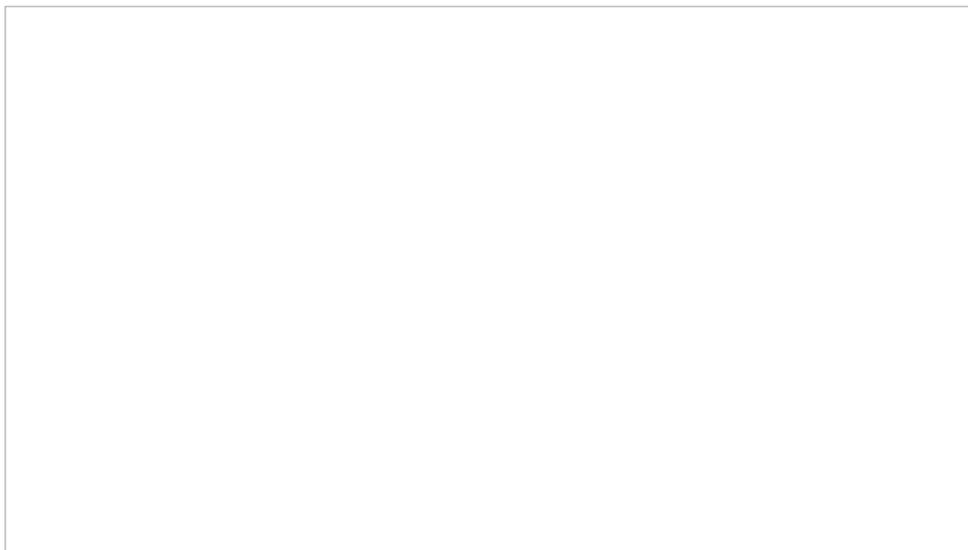
The service parameters whose settings are controlled by the link group membership will be highlighted with orange dots.

To remove the campaign from a link group it was previously assigned to, select **None** from the drop-down menu.

## Begin this campaign after

By default, the order in which campaigns in the link group will be activated is determined by the order those campaign were added to the group. You can redefine this order for the given campaign by selecting the preceding campaign from the drop-down menu. If the given campaign shall be processed first, select **none (1st)**.

## Preview Options



Preview options

## Screenpop URL

*Screenpop URL* is the URL of the web page that will be displayed by the Agent Desktop application when the agent receives a preview record. Normally this is a web page that might contain additional information about the calling record. A query string can be added to supply variables for the screen pop. See the group of variables [Outbound Target Work Item Parameters](#) in the *Scenario Builder Reference Guide*.

This parameter is optional. If it is not set, only the customer name and phone number to be dialed will be displayed in the contact panel of the Agent Desktop application.

Note that you can display information from calling records using [Activity forms](#).

In addition, the specified web page will be displayed in the [Context Information Area](#) of Agent Desktop. This area is not shown when Agent Desktop is run minimized using the [Pop-out function](#). Thus, when using URL screen pop, consider disabling agents' [privilege Force pop-out phone window](#).

## Screen-popping CRM URLs

When configuring the general properties of your preview campaign, you can enable specific Salesforce or Zendesk URLs to be screen-popped to the Agent Desktop.

### For Salesforce Classic, Salescloud, and Lightning:

1. In the **Screenpop URL** field of Preview Options, enter the object ID (e.g., `$(workitem.otherInfo.SalesforceID)`).
2. Learn more about [object ID](#) and [screen-pop configuration](#) in the *Salesforce.com Integration Guide*.

### For Zendesk:

1. In the **Screenpop URL** field of preview service, enter the ticket URL with the Zendesk ID (e.g., `tickets/$(workitem.otherInfo.ZendeskID)`).
2. Learn more about [screen-pop configuration](#) in the *Zendesk Integration Guide*.

## Start dialing first number automatically

By default, agents dial numbers from list records manually. Select this checkbox if the first number of the list record shall be dialed automatically after the amount of time allocated for record preview (see option *Start dialing after*).

## Start dialing after

*Start dialing after* is the amount of time allocated for list record preview. This parameter is essential only if option *Start dialing first number automatically* is enabled.

## Use specific agent assignments for records

Records of the calling lists associated with the given campaign may be assigned to specific agents. If you select this option, any such records will be distributed only to the agents assigned to handle them. For more information, see the description of field type *Agent Login ID* in section [Lists](#).

## Limit manual outbound calls to numbers in lists and record manual call results in campaigns

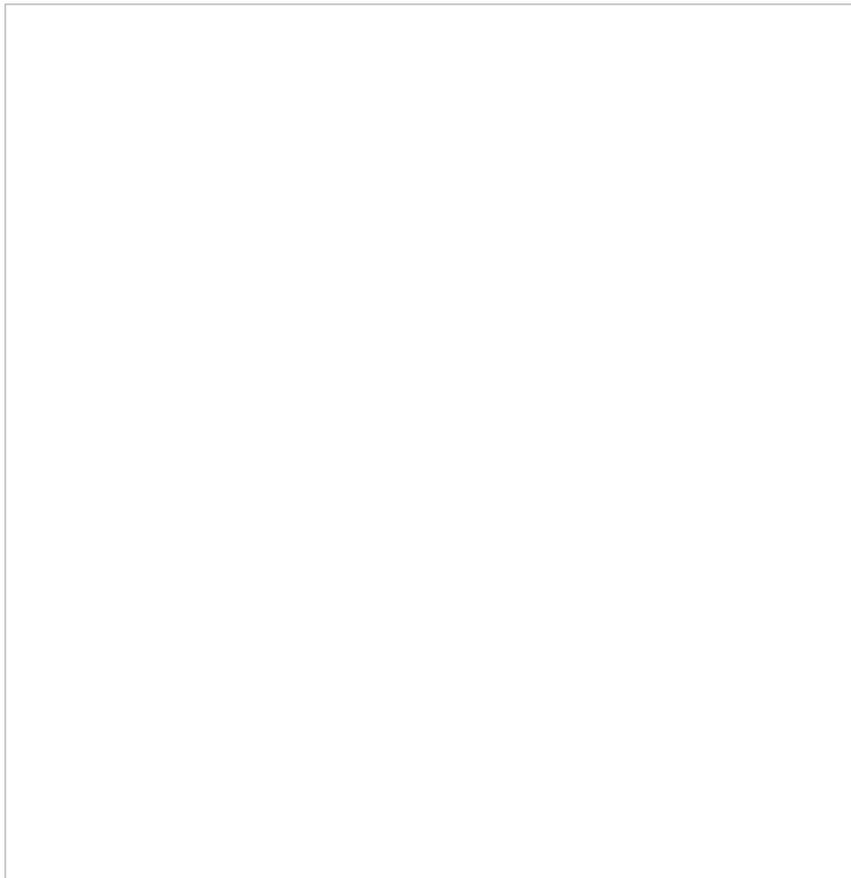
When enabled, this setting allows manually dialed phone numbers to be included in outbound or blended campaigns, should the phone number match one of the campaign's dialable phone numbers; click-to-call numbers are also included. Once included in a campaign, manually dialed calls will be counted toward related campaign metrics.

Additionally, when this setting is selected, the following applies:

- Calls adhere to [Do Not Call \(DNC\) lists](#) and [safe-calling hours](#)
- Calls count toward dial attempts
- [Dial rules by disposition](#) are allowed
- Calls on closed records are prevented

Note that this checkbox is unchecked by default and this setting is not currently available for use with hardphones.

## Predictive Options



Predictive options

### No Answer timeout

If the ring back tone is received, *No Answer timeout* specifies for how long the system shall wait for an answer before abandoning the call attempt with the disposition *No Answer*.

### Scenario to run when answered

*Scenario to run when answered* indicates which scenario should be run upon answer. The *Default* scenario will provide a simple connect to the longest available agent while the calls that are not connected to agents within the specified *Unattended call timeout* (see below) will be terminated.

Bright Pattern Contact Center provides a [scenario template](#) called *Predictive Telemarketing Campaign* that serves as an example of how unattended calls can be treated in a compliant manner (according to the current FCC regulations).

### **Detect voice before connection**

This indicates whether, upon answer, the system shall wait to detect voice before connecting this call to an agent. Deselect this checkbox if the calls should be connected to agents immediately upon answer.

### **Detect answering machine**

*Detect answering machine* indicates whether upon voice detection the system shall try to distinguish live voice from an answering machine greeting or other prerecorded announcement. This setting is essential only if the *Detect voice before connection* setting is enabled (see above). Deselect this checkbox if the calls should be connected to agents immediately upon detection of a voice.

### **Wait for beep when detecting answering machine**

This indicates whether the “announcement vs. answering machine” decision shall be based on detection of a beep sound after the speech segment. (If disabled, disposition *Announcement* will be used for all long speech messages.) It is essential only if the *Detect answering machine* setting is enabled (see above).

### **Record CPA phase of call attempts**

*Record CPA phase of call attempts* indicates whether the Call Progress Analysis (CPA) phase of the campaign calls shall be recorded. Such recordings are stored in separate audio files and can be used to verify reaction of the system to various call attempt outcomes. CPA recordings can be checked using the [Quality Management playback function](#) and also [exported](#) for offline analysis.

This option is visible and available to you only if specifically activated for your contact center at the service provider level.

### **Unattended call timeout**

*Unattended call timeout* specifies for how long, from the moment a call is answered by the called party, the default scenario will wait until terminating this call. Note that this setting only applies if the <<Default scenario>> is selected as the [scenario to run when answered](#).

If you apply any other scenario to process answered call attempts (i.e., select anything other than <<Default scenario>> as the scenario to run when answered), you should set the unattended call timeout as the last interval of the [Find Agent block](#) of the given scenario. You should also define the action applied to such unattended calls when the timeout expires as the conditional *Time Out* exit of the given block.

Bright Pattern Contact Center provides a [scenario template](#) called *Predictive Telemarketing Campaign* that serves as an example of how unattended calls can be treated in a compliant manner (according to the current FCC regulations). In this scenario template, the interval of the Find Agent block is set to 0-2 seconds and its *Time Out* conditional exit starts an IVR script that introduces the caller and provides the called party with an opt-out option.

### **Maximum dropped calls (reporting threshold), %**

This setting is reserved for future use.

### **Dialer Aggressiveness**

## Target occupancy, %

This setting is used in Predictive mode only.

*Target occupancy* specifies the target occupancy for the agents participating in this campaign that will be used by the predictive algorithm to calculate the dialing frequency. Occupancy is defined as the time spent handling calls relative to the time total working time--that is,  $(\text{Busy Time} + \text{ACW Time}) / (\text{Busy Time} + \text{ACW Time} + \text{Ready Time}) * 100$ .

Changes in the target occupancy of a running campaign will take effect immediately. Such changes may be necessary in order to observe compliance with the telemarketing law for maximum percentage of unattended calls (also known as *abandonment rate*). The percentage of unattended calls can be monitored in real time (see section General Campaign Metrics View of the *Supervisor Guide*) and/or historically (see section Telemarketing Compliance Report of the *Reporting Reference Guide*).

## Initial Overdial Rate, %

This setting is used in Predictive mode only.

*Initial Overdial Rate, %* specifies the percentage of call attempts that will be made for this campaign relative to call attempts that are expected to be answered. This configured value will determine the dialing frequency at the start of this campaign. For example, if you expect only every second attempt to be successful, you can set the initial overdial rate to 200%, and the system will initially make twice as many call attempts as there are agents in the *Ready* state.

Note that this setting is an inversion of the *Estimated Success Rate (ESR)*, which was used in the product prior to Bright Pattern Contact Center version 3.10 for the same purpose. The ESR is defined as the expected percentage of call attempts that will be answered relative to all call attempts that will be made for this campaign; thus, if you upgrade from a previous version of Bright Pattern Contact Center and the ESR for a particular campaign was set to 50%, you will see the *Initial Overdial Rate* for this campaign set to 200%. (The ESR is displayed as a read-only value next to it.)

Once the system has accumulated enough statistics for dial frequency prediction, the configured Initial Overdial Rate value will be replaced with the actual overdial rate calculated and constantly updated in real time.

You can reset statistics used in calculation of the actual success rate and reapply the configured Initial Overdial Rate value at any time during campaign operation by clicking the **Reset statistics** button.

## Limit manual outbound calls to numbers in lists and record manual call results in campaigns

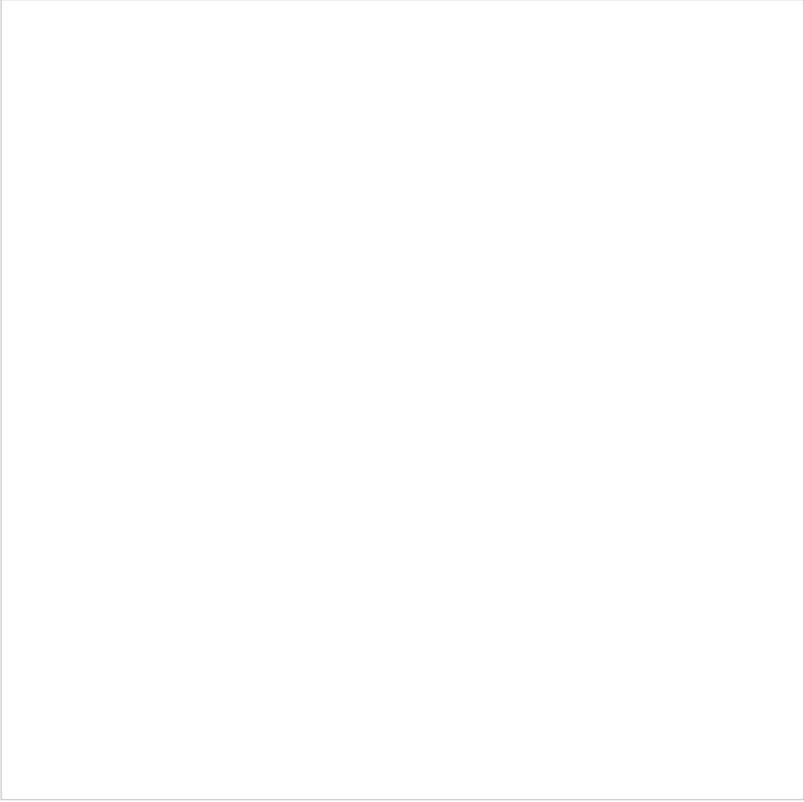
When enabled, this setting allows manually dialed phone numbers to be included in outbound or blended campaigns, should the phone number match one of the campaign's dialable phone numbers; click-to-call numbers are also included. Once included in a campaign, manually dialed calls will be counted toward related campaign metrics.

Additionally, when this setting is selected, the following applies:

- Calls adhere to [Do Not Call \(DNC\) lists](#) and [safe-calling hours](#)
- Calls count toward dial attempts
- [Dial rules by disposition](#) are allowed
- Calls on closed records are prevented

Note that this checkbox is unchecked by default and this setting is not currently available for use with hardphones.

## Progressive Options



Progressive options

## No Answer timeout

If the ring back tone is received, *No Answer timeout* specifies for how long the system shall wait for an answer before abandoning the call attempt with the disposition *No Answer*.

## Scenario to run when answered

*Scenario to run when answered* indicates which scenario should be run upon answer. The *Default* scenario will provide a simple connect to the longest available agent while the calls that are not connected to agents within the specified *Unattended call timeout* (see below) will be terminated.

Bright Pattern Contact Center provides a [scenario template](#) called *Predictive Telemarketing Campaign* that serves as an example of how unattended calls can be treated in a compliant manner (according to the current FCC regulations).

## Detect voice before connection

This indicates whether, upon answer, the system shall wait to detect voice before connecting this call to an agent. Deselect this checkbox if the calls should be connected to agents immediately upon answer.

## Detect answering machine

*Detect answering machine* indicates whether upon voice detection the system shall try to distinguish live voice from an answering machine greeting or other prerecorded announcement. This setting is essential only if the *Detect voice before connection* setting is enabled (see above). Deselect this checkbox if the calls should be connected to agents immediately upon detection of a voice.

## Wait for beep when detecting answering machine

This indicates whether the “announcement vs. answering machine” decision shall be based on detection of a beep sound after the speech segment. (If disabled, disposition *Announcement* will be used for all long speech messages.) It is essential only if the *Detect answering machine* setting is enabled (see above).

### **Record CPA phase of call attempts**

*Record CPA phase of call attempts* indicates whether the Call Progress Analysis (CPA) phase of the campaign calls shall be recorded. Such recordings are stored in separate audio files and can be used to verify reaction of the system to various call attempt outcomes. CPA recordings can be checked using the [Quality Management playback function](#) and also [exported](#) for offline analysis.

This option is visible and available to you only if specifically activated for your contact center at the service provider level.

### **Unattended call timeout**

*Unattended call timeout* specifies for how long, from the moment a call is answered by the called party, the [Find Agent block](#) of the applied scenario (see *Scenario to run when answered* above) will wait for an available agent before processing it in the manner defined by the conditional exit *Time Out*.

Note that the *Default* scenario will terminate such calls.

Bright Pattern Contact Center provides a [scenario template](#) called *Predictive Telemarketing Campaign* that serves as an example of how unattended calls can be treated in a compliant manner (according to the current FCC regulations).

### **Maximum dropped calls (reporting threshold), %**

Enter the maximum percentage of allowable dropped calls.

### **Progressive Power Dialing**

#### **Overdial Rate, %**

This setting is used in Progressive mode only.

*Overdial Rate, %* specifies the percentage of call attempts that will be made for this campaign relative to call attempts that are expected to be answered. This configured value will determine dialing frequency for the duration of the campaign. For example, if you expect only every second attempt to be successful, you can set the initial overdial rate to 200%, and the system will make twice as many call attempts as there are agents in the *Ready* state.

Setting the Overdial Rate to 100% (default) practically means that for any answered call, there will be an agent available to accept it.

### **Limit manual outbound calls to numbers in lists and record manual call results in campaigns**

When enabled, this setting allows manually dialed phone numbers to be included in outbound or blended campaigns, should the phone number match one of the campaign’s dialable phone numbers; click-to-call numbers are also included. Once included in a campaign, manually dialed calls will be counted toward related campaign metrics.

Additionally, when this setting is selected, the following applies:

- Calls adhere to [Do Not Call \(DNC\) lists](#) and [safe-calling hours](#)
- Calls count toward dial attempts

- [Dial rules by disposition](#) are allowed
- Calls on closed records are prevented

Note that this checkbox is unchecked by default and this setting is not currently available for use with hardphones.

## Automatic (IVR) options



Automatic IVR options

### Max concurrent calls

This option specifies how many calls can be in progress simultaneously.

### No Answer timeout

If the ring back tone is received, *No Answer timeout* specifies for how long the system shall wait for an answer before abandoning the call attempt with disposition *No Answer*.

### Scenario to run when answered

*Scenario to run when answered* indicates which scenario should be run upon answer. Note that for Automatic (IVR) mode, the scenario containing a recorded IVR message should be explicitly defined.

### Detect voice before connection

This option indicates whether upon answer the system shall wait to detect a voice before connecting this call to an agent. Deselect this checkbox if the calls should be connected to agents immediately upon answer.

### Detect answering machine

*Detect answering machine* indicates whether, upon voice detection, the system shall try to distinguish the voice from an answering machine greeting. It is essential only if the *Detect voice before connection* setting is enabled (see above). Deselect this checkbox if the calls should be connected to agents immediately upon detection of a voice.

### Wait for beep when detecting answering machine

This option indicates whether the “announcement vs. answering machine” decision shall be based on detection of a beep sound after the speech segment. (If disabled, the disposition *Announcement* will be used for all long speech messages.) It is essential only if the *Detect answering machine* setting is enabled (see above).

### Record CPA phase of call attempts

*Record CPA phase of call attempts* indicates whether the Call Progress Analysis (CPA) phase of the campaign calls shall be recorded. Such recordings are stored in separate audio files and can be used to verify the reaction of the system to various call attempt outcomes. CPA recordings can be checked using the [Quality Management playback function](#) and also [exported](#) for off-line analysis.

This option is visible and available to you only if specifically activated for your contact center at the service provider level.

### Limit manual outbound calls to numbers in lists and record manual call results in campaigns

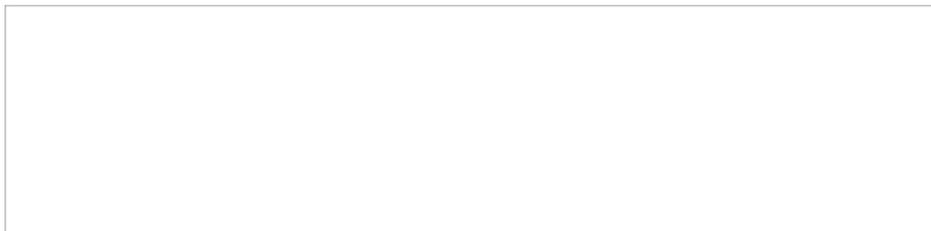
When enabled, this setting allows manually dialed phone numbers to be included in outbound or blended campaigns, should the phone number match one of the campaign’s dialable phone numbers; click-to-call numbers are also included. Once included in a campaign, manually dialed calls will be counted toward related campaign metrics.

Additionally, when this setting is selected, the following applies:

- Calls adhere to [Do Not Call \(DNC\) lists](#) and [safe-calling hours](#)
- Calls count toward dial attempts
- [Dial rules by disposition](#) are allowed
- Calls on closed records are prevented

Note that this checkbox is unchecked by default and this setting is not currently available for use with hardphones.

## Messaging Options



### Messaging Options

Note that your account-wide message sending speed shared by all running messaging campaigns is displayed here. Please take this rate into account when estimating the duration of the campaign and timeliness of message delivery.

### Message to send

This field allows you to configure the text message to send to each calling list record. The message sent will be the same for every record, and the message may include calling list record fields added as variables for personalization. When including record fields, you may use the following variables:

- contactInfo
- firstName
- fullInfo (e.g., \$(fullInfo.Status))

- lastName
- otherInfo
- suggestedPhone

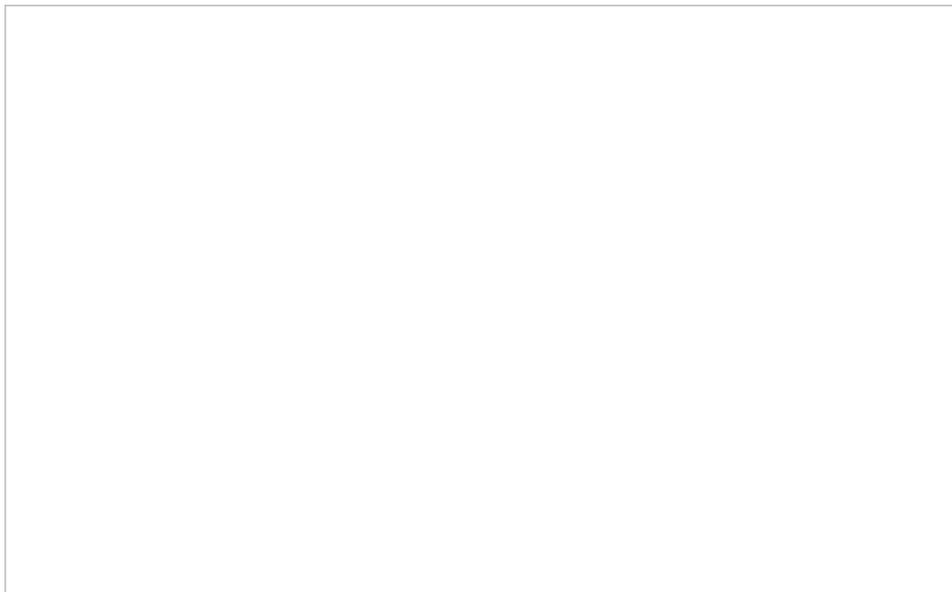
Note that this field does not have a character limit; however, SMS carriers may limit the length of the messages. If the message is too long, the carrier may either truncate it or fail the request completely. For more information, contact your service provider.

## Outbound - Calling Hours

This section describes the campaign calling hours that are configured in the *Calling Hours* section of the Services and Campaigns [Outbound tab](#).

*Calling hours* determine time intervals within which calls to specific destination phone numbers can be made. All hours defined in this tab are specified for the time zone of the destination number to be called.

Note that campaigns also have general hours of operation. See the description of the property *using hours of operation* of the [General tab](#). Note that hours of operation are defined in the time zone where your contact center is located.



Services & Campaigns > Outbound Voice Service > Outbound > Calling Hours

## Calling Hours Configuration

### Calling Hours table

This table defines calling schedules for phones of specific types and the order in which phones of different types will be called within each such schedule. For example, you can define that only mobile numbers will be called during the day, while during the evening hours, home phone numbers will be called first, and then mobile phones will be tried.

Note that specification of calling schedules is mandatory. That is, you must define a schedule even if the associated calling lists contain only one type of phone. Note also that the system does not check whether these hours fit within the general campaign's hours of operation specified by *Start/Stop Automation* settings of the [General](#) page.

## To define a schedule

1. Click **add schedule** in the *Hours* column.
2. Select a calendar.
3. Specify the calling hours. (See section *Calendars* for more information. A schedule can have several calendars, each with its own hours of operation.)
4. Click **add** to add another calendar (if desired).

## To apply the schedule to a particular phone type

1. Click **add** in the *Phones to call, by preference* column. The drop-down menu that appears will contain the phone types from the [list\(s\) associated with this campaign](#).
2. Select the phone type to which this calling schedule will apply. The same schedule can be used for multiple phone types.
3. Click **add** again to add another phone type to the same schedule.

Note that the order in which phones of the same record will be called within the given schedule is determined by the order in which they appear in this list. You can change the original order at any time by dragging a phone type to a new desired location in the list.

Repeat these steps to create additional schedules.

For the USA, Canada, Mexico, Brazil, Russia, Indonesia, and Australia, the adjustment of calling hours for time zones of destination numbers is performed using area codes. For all other supported countries, adjustment is performed using the country code only. Thus, in order for any restricted calling hours to work properly, destination phone numbers must start with a country code. In other words, unless the campaign is set to be open 24/7, any numbers without a country code will be skipped. Note that a country code can be added to imported numbers automatically as part of the [list import process](#).

For the list of countries for which the adjustment of calling hours is currently supported, see section [Countries, Codes, and Time zones](#). Note that if a number in the calling list begins with a calling code that is not on that list, it will be dialed only if (1) the campaign calling hours for the corresponding phone type are set to 24/7, and (2) the *Comply with State calling hours* checkbox (see below) is not selected.

## Use safe calling hours

Select this checkbox to enable an additional time zone check using the postal code.

Without the *Use safe calling hours* option selected, the adjustment of calling hours for time zones of destination numbers is performed using the area codes only. If this option is selected, both the time zone associated with the area code and the time zone associated with the postal code is checked. If they are the same, this option does not have any special meaning. If they are different, calling the corresponding number will take place only during the "safe" window (i.e., when the campaign is open in both time zones).

**Note:** This setting currently works only for US zip codes.

## Comply with State calling hours

Many countries impose restrictions on the hours when consumers can be called by businesses. In some countries, such restrictions may differ from one state/province to another. For information about configuring state- and nation-wide calling hour restrictions, see section [State Calling Hours](#).

Select this checkbox if you would like to observe the configured State Calling Hours while making calls for this campaign. If this checkbox is selected, the country/state information of the calling list record will be checked against the configured hours, and the call attempt will only be made if the current day and time fit within the permitted calling window.

Note that the system first looks for state information in the list field of the *State/Province* column type. If this field is absent/undefined, the system will try to look up the state information using the value of the *Postal Code* field. Area codes are not used to determine state information.

To review and/or change the configured restrictions, click the **State calling hours** link.

## Outbound - Dial Rules

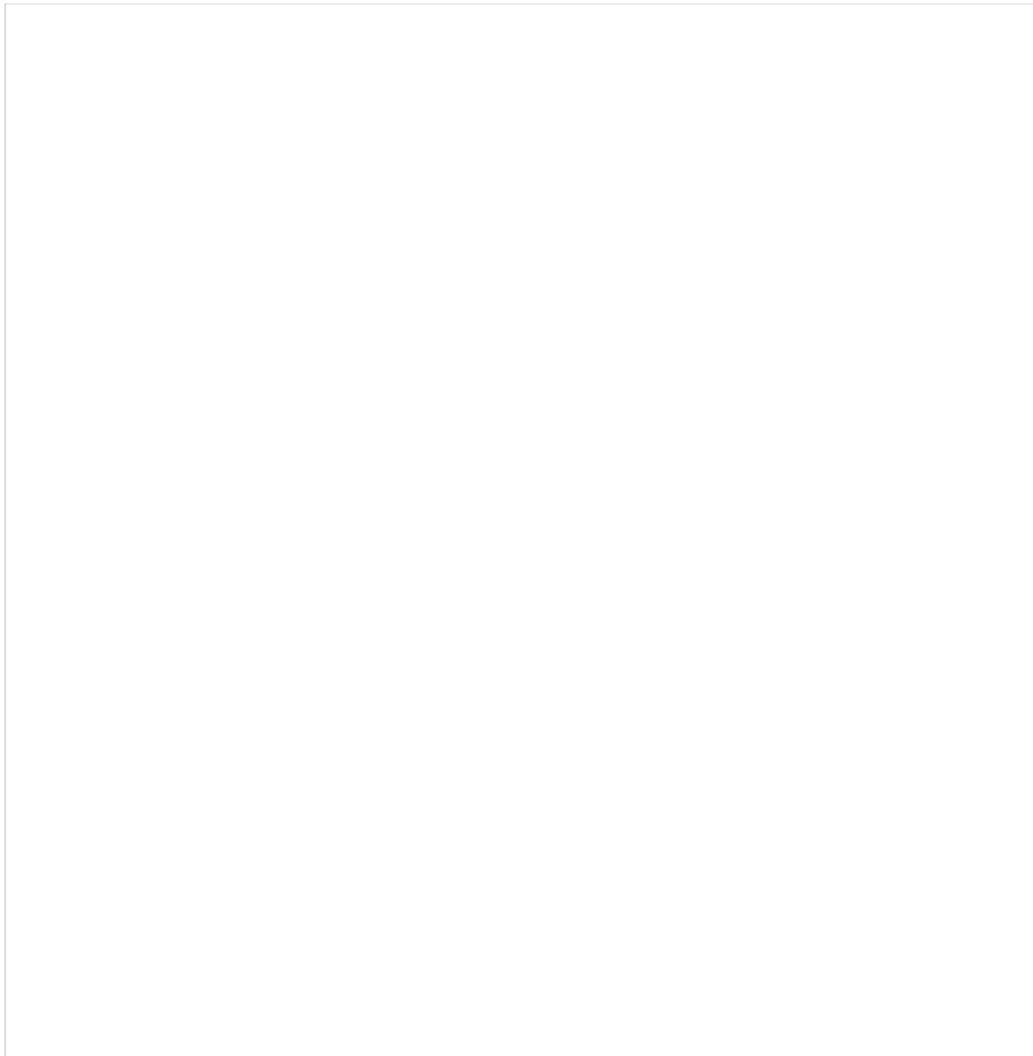
This section describes the campaign dial rules that are configured in the *Dial Rules* section of the Services and Campaigns' [Outbound tab](#).

The *dial rules* put limits on the number of call attempts, as well as specify actions that are to be taken with respect to records that have not been finalized within a current dialer's pass through the calling list. (A *pass* is a part of the campaign during which the dialer tries all dialable records in associated calling lists.)

During each pass, the dialer selects records from enabled lists associated with the given campaign, taking into account the following factors (in the order of priority):

1. [List order](#) (if multiple lists are assigned to the campaign)
2. [Dialing ratio](#) (if multiple lists are assigned to the campaign with the same [list order](#))
3. Records marked as [priority records](#) within the list. Note that 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 also may be set to expire after a specified time period.
4. Rescheduled records that are due for the next call attempt. Note that rescheduling may be defined as a window (i.e., have both the start and end time). When the end time is reached, the record is no longer treated as a rescheduled one (even if it could not be called during its reschedule window) and becomes a regular record processed in the general sorting order.
5. [Sorting order](#) configured for the list within the given campaign.

The above general record selection order may be further affected by the *Perform full passes through list* setting.



Services & Campaigns > Outbound Voice Service > Outbound > Dial Rules

## Dial Rules Page Settings

### Maximum attempts per record

This setting specifies the maximum number of calling attempts for one list record within the campaign. If the specified number of attempts for a particular record is reached, it will not be attempted again. If the calling record has only one number, the record disposition in this case will correspond to the disposition of the last call attempt. If the record contains multiple phone numbers and they are tried during the campaign, the disposition in this case will be set to [No numbers left to call](#).

### Maximum attempts per number

*Maximum attempts per number* specifies the maximum number of calling attempts for the same phone number within a record.

### Attempt all numbers in record first

Use this setting to redefine the order in which multiple phones of the same record will be dialed relative to the other records of the same list.

By default, the Dialer will pull a number of records into memory for dialing. By choosing the option to *Attempt all numbers in record first*, the dialer will attempt the subsequent numbers on the already attempted records, before pulling additional new records into memory for dialing, assuming there are no additional changes to consider (i.e., new agents have been added to the pool and the and initial records in memory must be extended).

Without the *Attempt all numbers in record first* option selected, the dialer will dial through all records on first number before attempting to dial on any subsequent numbers in the record.

## Perform full passes through list

By default (with the checkbox selected), during a dialer's pass through a calling list, each dialable record is attempted once. That is, once the dialer starts a pass, it will select records for dialing one by one according to the specified sorting order until it reaches the end of the list. After that, the next pass through the list will begin. Thus, if the list is updated incrementally, new records may or may not be called during the current pass depending on their position in the list (which is determined by the applied sorting order). This default setting can be recommended when all records in the associated calling lists have relatively similar value and it is important that all of them are attempted during the given campaign.

With the checkbox unselected, the dialer will always look for the next dialable record from the top of the list. This may be desirable when new records are [added periodically](#) to an active calling list and the sorting order is used to define relative value of records within that list (e.g., more recent leads have a higher conversion rate). This setting guarantees that new high-value records appearing at the top of the list will be attempted as soon as they are added to the list. Note that in this case the end of the list may never be reached (e.g., with a long original list, frequent updates, and/or large number of high-value records in those updates).

To further illustrate how this option works, consider the situation where you add new records to a list in a running campaign and, according to the specified [sorting order](#), they are positioned at the top of the list:

- With this checkbox selected (default), the dialer will finish the current pass first and the new records will be called only on the next pass through the list.
- With the checkbox unselected, the dialer will start calling these new records immediately.

## List of dial rules by disposition

This list contains the [dispositions](#) that are defined for the given outbound campaign and indicate that the record processing within the campaign has not been finalized. (These include any system dispositions indicating unsuccessful interaction processing with possible subsequent attempts as well as any custom dispositions of type *Continue*.)

Default actions are provided for all such dispositions. For custom dispositions of type *Continue*, the default action is *Reschedule (24h)*. To modify the default action for a particular disposition, double-click the corresponding table row and specify the desired action in the *Edit Dial Rule* dialog that appears.

## Edit Dial Rule Dialog Settings

To edit a Dial Rule, double-click on any entry in the list. Double-clicking brings up the *Edit Dial Rule* dialog window with the following settings to specify.



The Edit Dial Rule dialog window is where you update settings for each dial rule of the outbound voice campaign

## Disposition

*Disposition* displays the selected disposition. It is read-only.

## Retry

*Retry* indicates whether the called phone number shall be retried within a short period of time. Retries are to be used for dispositions indicating attempt failure due to a short temporary condition (e.g., *Busy* or *Phone network unavailable*). Such retries are considered to be part of the same calling attempt. Select the checkbox to enable retries for the given disposition.

## Maximum retries

This is the maximum number of retries per calling attempt. *Maximum retries* must be specified if the *Retry* option is selected.

## Retry interval

*Retry interval* is the period of time in minutes between retries. It must be specified if the *Retry* option is selected.

## Action

*Action* is what will be applied when a calling attempt produces the selected disposition. The following types of actions are available:

- **Run scenario:** A specified scenario will be applied to this call attempt. This can be used, for example, to leave a prerecorded message on the customer's answering machine.

Note that this action will work:

- - Only for Predictive/Progressive and Automatic campaigns
  - Only for call attempts that received an answer from the called party (i.e., a scenario cannot be run for call attempts that received *Busy* or *No Answer*)

- And only if such answered call attempts do not result in connections to agents (i.e., a scenario can be run for an automatically detected *Answering Machine, Fax, or Silence*)
  - In the above example, if an answering machine is recognized automatically, the call can be further processed by the specified scenario. If the call was connected to the agent, and the agent set the disposition to "Answering Machine," the scenario will not be automatically applied; however, the agent can transfer this call to the scenario manually.
  - Note that system dispositions that do not follow voice media creation protocols (e.g., "Fax Machine" or "System disconnect") cannot fire scenarios.
- **Stop calling number:** No more attempts to call this number within this campaign will be made.
- **Stop calling number for all campaigns:** This number will no longer be attempted as part of the calling list where it is defined.<sup>[1]</sup>
- **Stop calling record:** All attempts to call any number from this record within this campaign will be stopped.
- **Wait:** Processing of the corresponding record will continue according to the general dial rules for this campaign. If, according to the general dial rules, the record should be dialed again, the next attempt will begin no sooner than the specified *Min wait time*. The delay is introduced to avoid immediate repeated attempts to call same records in small or nearly completed calling lists.
- **Reschedule:** Another calling attempt for this number within this campaign will be scheduled. If this disposition is visible to agents, they will be able to [schedule the next call attempt manually](#). For records with multiple phone numbers, note the following:
  - If a new call attempt is scheduled manually, this attempt will be made to the number specified by the agent. Until then, all other numbers in the record will be ignored.
  - If a new call attempt is scheduled automatically, processing of other numbers in the record will depend on the setting for "Attempt all numbers in record first" option (see above). If this option is selected, the system will still attempt all numbers in the record that follow the number for which the rescheduling was performed (as specified in the campaign's [calling hours](#)). Otherwise, all such numbers will be ignored until the rescheduled attempt is made.

## Min wait time

See the description of the action *Wait*.

## Reschedule interval

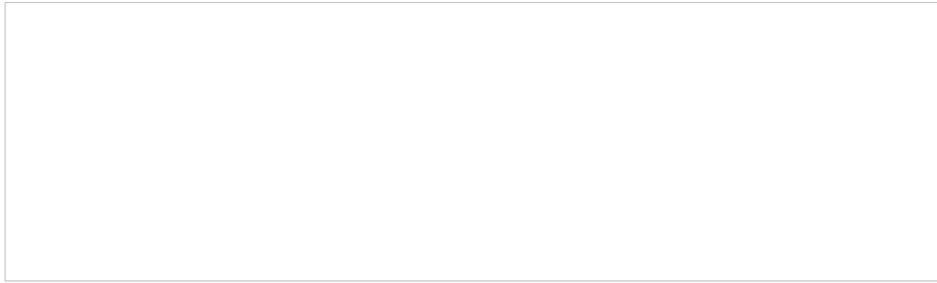
*Reschedule interval* is the amount of time in hours in which another attempt to call this number will be made if *Action* is set to *Reschedule*. Note that [manual rescheduling](#) takes priority over the default reschedule interval specified here.

## Scenario

This is the *scenario* that will be applied to the call attempt. It must be specified if *Action* is set to *Run scenario*.

# Outbound - DNC

This section of the Services & Campaigns [Outbound tab](#) is used to specify the Do Not Call (DNC) lists against which the calling records to be dialed during the given campaign will be checked. Records whose elements match corresponding elements of any of the specified DNC lists will not be dialed. For more information, see section [Do Not Call Lists](#).



Campaigns & Services > Outbound Voice Service > Outbound > DNC

**To add a DNC list:**

1. Log in as Admin to the Contact Center Administrator application.
2. Navigate to *Campaigns & Services > Outbound Voice Service > Outbound > DNC*.
3. Click **add**.
4. Select the desired **DNC List** from the drop-down menu.
5. Specify the *disposition* that will be attached to the call attempts whose phone numbers match numbers in this DNC list.

If the campaign is part of a [campaign link group](#), the selected DNC list can be applied automatically to all other campaigns in the link group. To indicate that the list shall apply to all campaigns in the link group, select the **apply to all campaigns in link group** checkbox.

When selecting an internal DNC list, note that by default, agents will be able to add new numbers to this list during the given campaign (e.g., upon request of the called party). If you wish to block this capability, deselect the **append OK** checkbox.

## Outbound - Diagnostics

This section of the Services & Campaigns [Outbound tab](#) can be used to verify the correctness and completeness of campaign configuration. The system checks the elements of the current campaign configuration and indicates potential problems. For the recommended process of outbound campaign configuration, see section [Outbound Campaign Configuration](#).

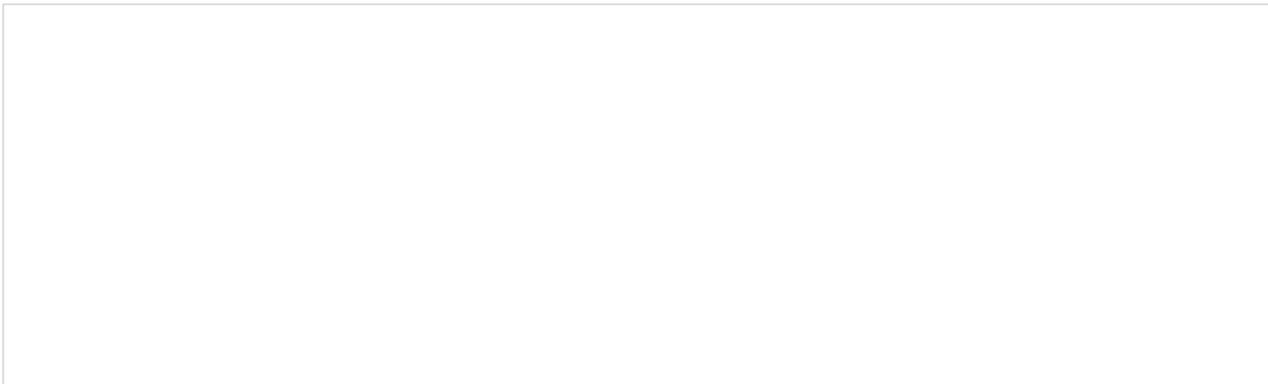


Services & Campaigns > Outbound Voice Service > Diagnostics

You can refer to this *Diagnostics* page at any time during the campaign configuration process. For elements that are not configured yet or should be corrected, clicking **edit** will take you to the application screen where the corresponding configuration tasks can be accomplished. Remember that clicking **edit** takes you away from the *Diagnostics* tab, and you will have to either click your browser's Back button to get back to it or navigate back to the *Diagnostics* tab again.

Note that this page also can be consulted in case of problems with campaigns that are already running, as some of such problems can be caused by dynamic configuration changes.

As shown, you can see examples of the type of completeness checks provided by the *Diagnostics* tab. The problem is described in detail, and the **edit** link brings you to the page to fix it:



Examples of configuration checks

Note that you will not necessarily see those same configuration checks in your system; those given are to be used as examples only. The fewer configuration checks you see, the better. When you open the *Diagnostics* and it appears to be empty, then you know that your campaign configuration is OK.

# How to Configure Outbound Campaigns

This section outlines the recommended general order of configuring an outbound campaign. Note that for campaign configuration, the Contact Center Administrator application provides a diagnostics page that you can use to verify the correctness and completeness of your campaign configuration. For more information, see section [Outbound - Diagnostics](#).

For quota-based campaigns, refer to the Bright Pattern Contact Center [Outbound Quota Tutorial](#).

The following steps suggest the order of actions that you should take when configuring outbound campaigns for your contact center.

## Step 1: Import and configure calling lists

Import the calling [lists](#) for your contact center's outbound campaigns. Lists contain the contact data (i.e., name, phone number, etc.) that is needed to dial contacts in your campaign.

## Step 2: Import and configure Do Not Call lists

[Do Not Call Lists](#) are separate lists of contacts that should never be called.

## Step 3: Review, and, if necessary, update state calling hours

Refer to section [State Calling Hours](#).

## Step 4: Create an outbound or blended service (campaign) and configure its general settings

Create and configure the general settings for outbound services or campaigns. See section [Services and Campaigns - Properties Tab](#).

## Step 5: Assign agent teams to the campaign

Refer to section [Services and Campaigns - Assignments Tab](#) to assign teams to the campaign. Note that the campaign will be created with a default skill that can be assigned automatically to all members of the associated agent team(s).

## Step 6: Create additional skills required for the campaign

Additional skills are called [auxiliary skills](#). Add any other required agent skills for this campaign.

## Step 7: Assign the auxiliary skills to agents of the assigned teams

Assign auxiliary skills to agents as required [skill levels](#).

## Step 8: Assign campaign operators to this campaign

Assign campaign operators. See section [Services and Campaigns - Assignments Tab](#).

## Step 9: Review and edit dispositions

Review and edit the default dispositions (i.e., [pre-defined dispositions](#)) and define additional dispositions as may be necessary to analyze the results of your campaign. See section [Services and Campaigns - Dispositions Tab](#).

## Step 10: Associate the calling lists with the campaign

The callings lists that you imported or added in [Step 1](#) of this procedure need to be associated with the campaign. Then, configure the lists for use within the campaign, and enable them when they are configured. See section [Services and Campaigns - Lists Tab](#)

## Step 11: Define scenarios

Define the interaction processing scenarios that may be needed for automatic processing of answered campaign calls and possible callbacks within this campaign. See section [Voice Scenarios](#).

Note that scenario templates are available for some typical outbound processing automation tasks, such as right-party connect (RPC) and the opt-out option for calls unanswered within the compliance time.

## Step 12: Create activity forms

Create the activity forms that the agents will use to process campaign calls, and bind them to the calling list data. See section [Activity Forms](#) and [Services and Campaigns - Activity Tab](#).

## Step 13: Add access numbers

Decide which [access numbers](#) will be used as caller IDs for this campaign, and, if necessary, associate these numbers with scenarios for possible callbacks.

## Step 14: Configure campaign caller IDs

Set up the caller IDs to be used for the campaign. See section [Services and Campaigns - Numbers Tab](#).

## Step 15: Configure campaign settings

Configure all campaign-specific settings, including campaign type, general schedule, estimated success rate, calling hours, dial rules, and *Do Not Call* lists. See section [Services and Campaigns - Outbound Tab](#).

## Step 16: Verify the completeness of campaign configuration

Verify that campaign configuration is correct on the campaign's [Outbound - Diagnostics](#) page.

## Step 17: Set up periodic export of campaign results and recordings

If you want campaign results and recordings to be exported automatically at select times, enable periodic exports in the [Services and Campaigns - Results Tab](#).

## Step 18: Enable the campaign

Your outbound campaign is active when you enable it. See section [Outbound - General](#).

## Request Skill or Service

The Request Skill or Service scenario block sets the skill requirements for the given interaction. Note that the minimum skill levels are set in the [Find Agent](#) block.



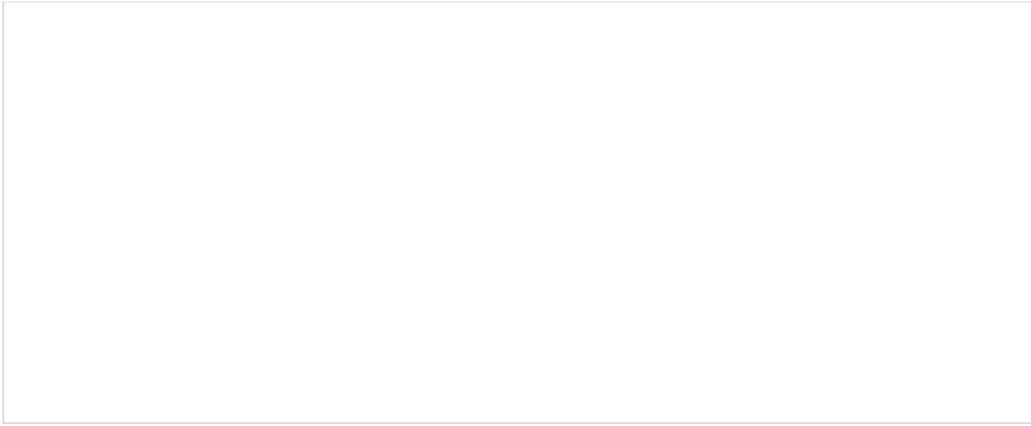
### Settings

The Request Skill or Service scenario block has two drop-down lists. The first one lists the skill groups currently configured in the system. The second one lists the skills configured for the selected skill group.

Settings should be configured as follows:

- In the first drop-down list, select the skill group containing the skill that an agent must have in order to be considered qualified to handle this interaction.
- In the second drop-down list, select the skill that an agent must have in order to be considered qualified to handle the interaction. The label of the Request Skill block will appear in the flowchart in this format: *Request Skill or Service "[skill group]=[skill]"*
- To remove all possible prior skill requirements for this interaction and to use only the skills specified in this block, select the **Reset prior skill requirements** checkbox.

**Note:** If a custom scenario is used for an [outbound campaign](#), note that it is not recommended to use this scenario block to change the service to a difference service. The result of this is the list of dispositions presented to and used by agents will not match the list of dispositions for the outbound campaign results.



Scenario Builder Request Skill or Service scenario block settings

1. [↑](#) **Note:** If this action is set as the default, the note "The number has been disabled in list" can be posted by the system in [One-Time Campaign Results](#) when it detects an invalid number.