Contact Center Help: Campaign Configuration

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Help: Page Help: Campaigns
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Contents

About Campaigns

The Campaign is the central component of the LiveOps Cloud Contact Center Platform routing model. Their most fundamental use is as the destination point for inbound and outbound telephone numbers. Campaigns either directly or indirectly determine virtually all of the configuration options that control the call experience. In the Contact Center routing model, every Campaign is the child object of a Program.

For users familiar with other call routing platforms, Campaigns are the equivalent of "Call Type" (in the Cisco™ platform) and "Vector Directory Number" (in the Avaya™) platform.

There are three classes or types of Campaign:

Standard Campaigns contain and centralize routing, telephony and other call experience options in a static configuration. Dynamic routing choices can be made using IVR (interactive voice response) applications. Standard Campaigns can be used for both inbound and outbound call types.

Call Flow Based Campaigns push much of the routing and telephony experience configuration options into Call Flows. Call Flows are dynamic and highly customizable. They are created by Contact Center Administrators using the visual Call Flow Designer.

Outbound Campaigns resemble standard IVR Campaigns, but are dedicated to outbound calling.

NOTE: Call Flow based Campaigns are sometimes referred to as "Enterprise Campaigns."

NOTE: All Contact Centers support Standard Campaigns. Currently, Outbound and Call Flow Campaigns are supported on a per Contact Center basis. If your Contact Center does not use Call Flow based Campaigns, you will only see Standard Campaign configuration options. This help module assumes your Contact Center uses Standard, Outbound and Call Flow based Campaigns.

Adding A New Campaign

NOTE: Campaigns belong to a Program, which in turn, belongs to a Client. You must have created at least one Client and one Program in your LiveOps Cloud Contact Center Platform before you can create your first Campaign.

To add a new Campaign:

1. Select the Routing > Campaigns menu.
2. Click the Add New Campaign button.
3. Give your Campaign a unique Name.
4. Select the Routing Class. This determines how and where virtually every aspect of the call experience is configured:
    1. Calls routed to Standard IVR Campaigns are largely controlled by the initial IVR and the configuration options contained within the Campaign itself.
    2. Calls routed to Call Flow based Campaigns are controlled by the currently active Call Flow for that Campaign.

NOTE: Once set (by saving this Campaign), you cannot change this selection.

1. Select the parent Program from the drop down menu.
2. Enter a description for this Campaign in the Comments field.
3. Click Save Changes.

NOTE: Once you have saved the Campaign for the first time, you will see additional configuration options. These will vary depending on the Routing Class.

Configuring Call Flow Campaigns

Call Flow Campaign General Tab Options

Table 2-1 lists the fields available on the Call Flow based Campaign's General tab:

Table 2-1: Call Flow Campaign General Tab Options.

Field	Description
Status	Determines the visibility of this Campaign in the Campaign list: • Active—this Campaign will show up in the Campaign list page • Retired—this Campaign will not appear in the list page unless the "Show Retired Campaigns" checkbox is selected
Campaign Name	Must be unique.
Program	The Program that owns this Campaign.
Comment	Use for notes or descriptions.
Call Flow	For Call Flow based Campaigns, the Call Flow controls Agent routing, as well as call behavior during each phase of the call.
Version	Select the Call Flow version: • Production—"Production" is a special tag you can give to a Call Flow version. You can configure the Call Flow's parent Campaign to always use the Production version of this Flow to handle calls to this Campaign. You can move the production tag to any version you like at any time. • Latest Version—when you select the latest version tag, whatever version of the specified Call Flow that has been most recently checked in will be used to handle calls to this Campaign. • Specific Version—select a specific version of the Call Flow to handle calls to this Campaign. This version will always be used until changed by you (or another Contact Center Administrator).

Scheduled Call Back

In this chapter...

- Call Back Slots
- Exceptions
- Call Back Options

The scheduled call back feature allows you to configure days and times to return customer calls.

Call back requests are created using the LiveOps Platform Services API `Callback` method inside a custom web applications. For example, you can use the LiveOps JavaScript Callback Widget in a form on your website to allow customers to request a return phone call. You can then create a Campaign and Call Flow to handle those requests.

NOTE: The scheduled call backs feature is only available for Call Flow based Campaigns.

Call Back Slots

Call backs can occur during the days and times you specify. These times are known as **call back slots.** Using the options on the Call Back tab, you configure the day of the week, start time and duration for each slot. You also configure the capacity of each slot, which is the number of call backs your agents can handle during the slot. Once a slot's capacity has been exceeded, you won't be able to schedule any more call backs for this slot.

Exceptions

Exceptions allow you to specify specific dates and times when call backs will not occur, such as holidays, company closures and the like.

Call Back Options

The Call Back tab contains the following options:

Table 3-1: Call Back Tab Options.

Field	Description
Day Tabs	Select the days on which to permit or restrict call backs.
Add New Scheduled Call Back Slot	Inserts a new call back slot.
Start time	The time (in 24 hour format) the slot begins.
Duration	The duration (in hours:minutes) the slot will remain active.
Capacity	Limits the number of call backs that can be processed during this time slot.
Add New Exception	Inserts a new exception to the call back schedule.

Exception date	The date on which the exception occurs.
Start time	The time (in 24 hour format) the exception begins.
Duration	The duration (in hours:minutes) the exception will remain active.

Features Tab Options

Table 4-1 lists the fields available on the Call Flow based Campaign's Features tab:

Table 4-1: Call Flow Campaign Features Tab Options.

Option	Description
Live Announcement	Use the Choose Audio link to select the audio clip from your library to use in the Live Announcement Call Action. *TIP: The Live Announcement feature is used to insert an audio prompt into the call queue. You can use this feature for special messages or other unplanned events.*
Use for outbound calls	If set to "yes," an Agent taking a call to this Campaign can place a dial out call from his/her phone panel.
Outbound ANI	The phone number to display to recipients of the dial outcall.
Routing Path (Destination routing group)	Override the default routing path for your Contact Center. *TIP: Routing paths allow you to specify flexible carrier paths for call routing. Your LiveOps Professional Services representative will work with you if this is a requirement in your Contact Center.*

Call and Screen Recording

The Contact Center Recording feature records the Agent's call experience.

Key Concepts

- You can record just the audio portion of the call, or you can record both the audio and Agent screen activity during the call.
- You can record all calls in your Contact Center, or you can choose to record only certain Campaigns or Agents.
- Recordings can be reviewed at a later date using Report Tool.
- You determine how long recordings are retained.
- Recordings may be encrypted for security.

The Campaign's Recording tab configures recording options for one specific Campaign, as described in Table 5-1.

Table 5-1: Campaign Recording Tab Options.

Option	Description
Audio Recording	Specify the default audio recording behavior for this Campaign. You may be override this on a per Agent basis. Options • Off—calls to this Campaign will not be recorded, regardless of Agent settings. • On—calls to this Campaign will be recorded by default. You may turn off audio recording for specific Agents by editing their account settings.
Retain calls for	Configure the length of time call recordings for this Campaign will be retained. After the expiration date, the recording will be deleted.
Screen Recording	Specify the default screen recording behavior for this Campaign. You may be override this on a per Agent basis. Options • Off—Screen activity and call audio for this Campaign will not be recorded, regardless of Agent settings. • On—Screen activity and call audio for this Campaign will be recorded by default. You may turn off screen recording for specific Agents by editing their account settings.

Retain screens for	Configure the length of time screen recordings for this Campaign will be retained. After the expiration date, the recording will be deleted.
Percentage of calls	Configure the length of time screen recordings for this Campaign will be retained. After the expiration date, the recording will be deleted.

NOTE: Both audio and screen recording must be enabled for your Contact Center by your LiveOps Professional Services representative.

NOTE: Screen recording is a premium feature. Your LiveOps Professional Services representative can provide more information on adding this feature to your Contact Center.

Links Tab

Many configuration pages in Contact Center contain a **Links** tab. This tab contains links to other configuration objects that depend on or are related to the current object, such as:

- The Campaign's parent Program
- Agent Pools
- Offers
- Call Flows
- Incoming Numbers

Clicking a link on this tab will display that item's configuration page.

Configuring Standard Campaigns

Standard Campaign General Tab Options

Standard Campaign options vary depending on the needs of your Contact Center. Table 7-1 lists the basic fields available to most Contact Centers on the Standard Campaign's General tab:

Table 7-1: Standard Campaign General Tab Options.

Field	Description
Status	Determines the visibility of this Campaign in the Campaign list: • Active—this Campaign will show up in the Campaign list page • Retired—this Campaign will not appear in the list page unless the "Show Retired Campaigns" checkbox is selected
Campaign Name	Must be unique.
Campaign Type	Lets you differentiate your reports according to the type of Campaign you select. You can filter reports in the Reporting Tool based on the type of Campaign, for example, IVR or Transfer.
Program	The Program that owns this Campaign.
Script URL	The screen that your Agents will see on their computers when they receive a call from Contact Center. Contact Center can "pop" a script or information screen to your Agents when they answer a call. Use this field to specify the URL of that screen. If you are not using on screen scripting (or are using the LiveOps Offer system) you can leave this field blank.
Comment	Use for notes or descriptions.
Forward to Phone Number	Allows you to bypass Agents and forward directly to a phone number. When you put a phone number in this field Contact Center will bypass any further handling by this Campaign and forward the incoming call to that number.
Max Queue Time	The maximum number of seconds calls to this Campaign should be queue before the queue is deactivated. If a queued call exceeds Max Queue Time, the queue is disabled until the longest call in queue has been in less than this length. When the queue is disabled, new callers will hear a busy signal if there are no Agents available to answer the phone.
Calls/Seats Ratio	Sets the ratio of forecasted calls to Agent seats. It allows you to adjust the ratio of forecasted calls to the number of Agent seats required to meet demand. The default is 1 Agent seat per every 3 forecasted calls. For a Program or Campaign with particularly long

	calls, you might want to create 1 seat for every 2 calls; for a Program (or Campaign) with shorter calls, maybe 1 seat per every 4 or more calls is a better number.
Queue Time Multiplier	When taking calls out of the queue, the system will multiply the length of time in the queue by this value to determine which calls to take first. When there is a call queue, the system tries to give calls to people who have been waiting the longest. To determine this, Contact Center takes each call's actual time in queue and multiplies it by the Queue Time Multiplier set for this call's Campaign. For example, a call that has been sitting in the queue for 60 seconds on a Campaign whose Queue Time Multiplier is 1.5 will be treated as if it has been in the queue for 90 seconds. Practically speaking, the bigger the Queue Time Multiplier, the "more important" a Campaign is considered, and the more rapidly its calls will be given to an Agent. The default value is 1.0.
Agent per minute fee	The per-minute rate, in dollars, Agents should be paid when they are on a call for this Campaign. This field's value cannot be changed if the Campaign has taken calls.
Record Calls?	If "Yes," this call will be recorded and available for later playback and review. Contact Center can record calls and store the audio on a file server so you can listen to them later. To listen to recorded calls, you can play a particular call's audio by clicking the Play Audio icon next to each call in a Report Tool result set. If you know the session ID for a given call, you can find that call using the Call Detail report, then clicking the "Play the Call" link.
Billable	If "Yes," this call will be billed to the client's account. Contact Center can keep a running tally of the billable minutes for each of your clients. This is set at the Campaign level. If you have a Campaign that should not be billed to a client, set the Bill Calls to Client? field to "No".
Add to Auto Client Access	Adds this Campaign to the list of Campaigns this Client can see in the Report Tool.
Live Announcement Support	If "Yes," this Campaign supports the Live Announcement feature. *TIP: The Live Announcement feature is used to insert an audio prompt into the call queue. You can use this feature for special messages or other unplanned events.*
Live Announcement is	If "On," this Campaign is currently playing the selected announcement audio.

Assign Agent Pools

In this chapter...

- Editing Agent Pools
- Pool Fields
- Working With Agent Pools

Agents who share similar Routing Attributes belong to the same Pool. You can create general Pools that admit all of your Agents, as well as more selective Pools, where only your best Agents, or those with a particular skill will be admitted, depending on how you set up your Attributes.

- The Pools tab in the Campaign Edit page allows you to assign previously created Pools. To create a new Pool, use the Routing > Pools menu.

Editing Agent Pools

1. Select the Routing > Campaigns menu.
2. Click the Add New Campaign button or locate an existing Campaign and click its Edit link.
3. Click the Pools tab.
4. Click the Add Pool link.
5. Use the Pool drop down menu to select the Pool you wish to assign.
6. Repeat steps 4 and 5 to add additional Pools.
7. (Optional) Adjust each Pool's weight (described below).
8. Click Save.

Pool Fields

Table 8-1 describes the Pool configuration options.

Table 8-1: Pool Tab Options

Option	Description
Pool	The Pool name. You can choose from all the Pools defined in your Contact Center. You can assign multiple Pools to a Campaign.
Weight	If you assign more than one Pool to a Campaign, Contact Center distributes calls to those Pools randomly, unless you change the Pool *weighting*. Weighting sets the probability that a Pool will be used, balanced against the weights of the other Pools in your Campaign. By default, each Pool you assign to a Campaign has an equal chance of being selected to handle an incoming call. If you want Agents in a particular Pool to get special consideration, adjust that Pool's weight accordingly. For example, if you have two Pools assigned to a particular Campaign (Pool A and Pool B), and you want the Agents in Pool B to be twice as likely as those in Pool A to get the call, then assign a weight of 2 to Pool B. Setting a weight to zero will cause this Pool to be used only if no available Agents were in the non-zero weight Pools.
Agents (Online)	The number of Agents currently online who belong to this Pool.

Agents (Total)	The total number of Agents who belong to this Pool.

Working With Agent Pools

Table 8-2: IVR Controls

If you want to...	...then do this
Change the Pool order	Use the up and down arrow widget to change the display order of this Campaign's Pools. *NOTE: The order in which Pools are listed has no effect on call routing.*
Edit the Pool	Click the Edit button to edit a Pool directly.
Delete a Pool	Use the X widget to delete a Pool from this Campaign. *NOTE: Deleting a Pool from a Campaign does not delete the Pool itself.*

Enable IVRs

In this chapter...

- Basic IVR Configuration
- IVR Options
- Working With IVRs

Interactive Voice Response (IVR) applications allow a telephone caller to select an option from a voice menu and otherwise interface with a computer system using their telephone. Generally, the IVR plays pre-recorded voice prompts to which the person presses a number on a telephone keypad to select the option chosen, or speaks simple answers such as "yes," "no," or numbers in answer to the voice prompts. (Automated speech recognition is often referred to as "ASR," and is a subset of IVR technology.)

LiveOps IVRs (sometimes called "LiveIVRs") go beyond these basic capabilities and are a powerful component of the LiveOps platform. They can access data from external sources, capture information securely, conduct satisfaction surveys and more. Contact Center can be configured to let you play an IVR to your callers in a number of circumstances. LiveOps IVRs are created and deployed by LiveOps Professional Services. Once deployed, you (a Contact Center Administrator) can configure IVR parameters and assign specific IVRs to your Campaigns.

TIP: For specific IVR requests, contact your LiveOps account manager.

Basic IVR Configuration

1. Select the Routing > Campaigns menu.
2. Click the Add New Campaign button or locate an existing Standard Campaign and click its Edit link.
3. If creating a new Campaign, follow the steps described in <u>Adding a New Campaign</u>.
4. Click the IVRs tab
5. Click the Add IVR link for each kind of IVR you want to assign
6. (Optional) Adjust each IVR's Weight, Start Time and End Time (described below)
7. Click Save

Table 9-1 describes the IVR configuration fields.

Table 9-1: IVR Configuration Fields.

Option	Description
IVR	The IVR name. Only IVRs belonging to this Program are shown. You can assign multiple IVRs of each type to a Campaign.
Weight	If you assign more than one IVR of a given type to a Campaign, Contact Center distributes calls to those IVRs randomly, unless you change the IVR *weighting*. Weighting sets the probability that a IVR will be used, balanced against the weights of the other IVRs in your Campaign. By default, each IVR you assign to a Campaign has an equal chance of being selected to play to an incoming call. If you want a particular IVR to get

	special consideration, adjust that IVR's weight accordingly. For example, if you have two Initial IVRs (IVR A and IVR B) assigned to a Campaign and you want IVR B to be twice as likely as IVR A to be played to the call, then assign a weight of 2 to IVR B. Setting a weight to zero means that IVR will never be played.
Start	The date and time this IVR will become active.
End	The date and time this IVR will become inactive.

IVR Options

Table 9-2 shows the types of IVRs supported by Contact Center and their options:

Table 9-2: IVR Types

IVR Type	Description
Hold IVR	The IVR to play to a caller while they are on hold. The Hold IVR can play audio, such as music or provide information to the caller. As there is no guarantee the caller will hear the complete IVR (since they can be retrieved from hold at any time), Hold IVRs should be fairly simple.
Initial IVR (aka Pre IVR)	The IVR to play to a caller before they enter the call queue. This IVR can play audio, get information or transfer the call to a more appropriate Campaign. If set, callers will experience the IVR before landing in the call queue.
Outleg IVR	The IVR to play to the person answering an incoming call. This is an IVR that will be played for the person who answers an inbound call (this portion of the call is the "out leg", hence the name of this IVR). This could be an Agent, or a client receiving a transferred call. Outleg IVRs are typically used to "brand" the incoming call with a short message or "jingle," which identifies the source of the call.
Post Call IVR	The IVR to play to a caller after the Agent hangs up. This IVR is most often used for playing surveys to callers to assess their opinion of the previous call or to gather other post call information. This section has the following fields: • Always play a post call IVR for ALL calls in this campaign—this field forces Contact Center to play the currently defined survey to every caller. • Default Survey—defines a default survey to play to callers to this Campaign. If no default survey is set for this Campaign, then any previously defined IVR (for example, from a transferring

	Campaign) will be used. If this Campaign's Client has no surveys defined, you can create one by clicking the link in the field description. • Do not play any Post Call IVR—prevents any previously defined post call surveys from playing. This will also block post call IVRs defined in Campaigns transferring to this Campaign. • Do not play Post Call IVR when transferring to an external phone number.—suppresses playing the survey when the call is transferred to a non-LiveOps controlled number. *TIP: The default survey can be overridden by defining a different survey in this Campaign's Initial IVR or Post Call IVR.*
Queue IVR	The IVR to play to a caller while they are in the call queue. This IVR can play audio, such as music or ring tones, or provide information to the caller. Since there is no guarantee the caller will hear the IVR (if there is no wait time for an Agent), queue IVRs should be fairly simple. If you want every caller to hear some information or answer questions, use an Initial IVR.

Working With IVRs

Table 9-3: IVR Controls

If you want to...	Then do this
Change the order of IVRs of a given type	Use the up and down arrow widget to change the display order of this Campaign's IVRs. *NOTE: The order in which IVRs are listed has no effect on determining which IVR will be played.*
Edit the IVR code	The IVR code itself is written by LiveOps Staff. Work with your LiveOps Account Manager to create the IVR code you need.
Delete an IVR	Use the X widget to delete an IVR from this Campaign. *Deleting an IVR from a Campaign does not delete the IVR itself.*

Specify Screen Pops and Offers

In this chapter...

Contact Center can "pop" a web page to your Agents when they answer a call. The script page can be any external URL or it can be a LiveOps Offer, a "telescript" page that is part of the LiveOps Cloud Contact Center Platform scripting system. Script URLs and Offers are defined as part of a Campaign.

About Offers

Offers are part of the complete LiveOps scripting system. Offers can be used to provide screen "pops" to Agents, supplying scripts for them to read to callers. Offers can capture caller information and display information from external data sources, such as IVRs and databases. Offers are where Agents can specify disposition codes for the call. A Campaign can have multiple Offers, allowing you to tailor your Agents' activities to specific circumstances and compare Offer variations.

NOTE: Currently, only LiveOps Staff can create Offers, but Contact Center Administrators can assign and configure which Offers your Campaigns will use, if any.

To Specify an External Screen Pop URL:

1. Select the Routing > Campaigns menu.
2. Click the Add New Campaign button or locate an existing Standard Campaign and click its Edit link.
3. If creating a new Campaign, follow the steps described in Adding a New Campaign.
4. On the General tab, locate the Script URL field: enter the address of the page to pop to Agents taking calls for this Campaign.

To Specify an Offer:

1. Select the Routing > Campaigns menu.
2. Click the Add New Campaign button or locate an existing Standard Campaign and click its Edit link.
3. If creating a new Campaign, follow the steps described in Adding a New Campaign.
4. Select the Offers tab.
5. Click the Add New Offer link.
6. Use the Offer drop down menu to select the Offer you wish to assign.
7. Repeat steps 4 and 5 to add additional Offers.
8. (Optional) Adjust each Offer's additional fields (described below).
9. Click Save.

NOTE: If you are using the LiveOps scripting system to display Agent Offers, you do NOT need to specify anything in the Script URL field.

Offer Fields

Table 10-1 describes the Offer configuration fields.

Table 10-1: Offer Configuration Fields

Option	Description
Offer	The Offer name. Only Offers belonging to this Program are shown. You can assign multiple Offers to a Campaign.
Product Code	Usually supplied by media companies to identify the source of the calls for this Offer.
Weight	If you assign more than one Offer to a Campaign, Contact Center distributes calls to those Offers randomly, unless you change the Offer *weighting*. Weighting sets the probability that an Offer will be used, balanced against the weights of the other Offers in your Campaign. By default, each Offer you assign to a Campaign has an equal chance of being selected to handle an incoming call. If you want a particular Offer to get special consideration, adjust that Offer's weight accordingly. For example, if you have two Offers assigned to a Campaign (Offer A and Offer B), and you want Offer B to be twice as likely as Offer A to get the call, then assign a weight of 2 to Offer B. Setting a weight to zero will cause this Offer to not be used.
Start	The date and time this Offer will become active.
End	The date and time this Offer will become inactive.

Working With Offers

Table 10-2: Offer Controls

If you want to...	...then do this
Change the Offer order	Use the up and down arrows to change the display order of this Campaign's Offers. *NOTE: The order in which Offers are listed has no effect on call routing.*
Delete an Offer	Use the X widget to delete an Offer from this Campaign. *NOTE: Deleting an Offer from a Campaign does not delete the Offer itself.*

Call and Screen Recording

The Contact Center Recording feature records the Agent's call experience.

Key Concepts

- You can record just the audio portion of the call, or you can record both the audio and Agent screen activity during the call.
- You can record all calls in your Contact Center, or you can choose to record only certain Campaigns or Agents.
- Recordings can be reviewed at a later date using Report Tool.
- You determine how long recordings are retained.
- Recordings may be encrypted for security.

The Campaign's Recording tab configures recording options for one specific Campaign, as described in Table 11-1.

Table 11-1: Campaign Recording Tab Options.

Option	Description
Audio Recording	Specify the default audio recording behavior for this Campaign. You may be override this on a per Agent basis. Options • Off—calls to this Campaign will not be recorded, regardless of Agent settings. • On—calls to this Campaign will be recorded by default. You may turn off audio recording for specific Agents by editing their account settings.
Retain calls for	Configure the length of time call recordings for this Campaign will be retained. After the expiration date, the recording will be deleted.
Screen Recording	Specify the default screen recording behavior for this Campaign. You may be override this on a per Agent basis. Options • Off—Screen activity and call audio for this Campaign will not be recorded, regardless of Agent settings. • On—Screen activity and call audio for this Campaign will be recorded by default. You may turn off screen recording for specific Agents by editing their account settings.

Retain screens for	Configure the length of time screen recordings for this Campaign will be retained. After the expiration date, the recording will be deleted.
Percentage of calls	Configure the length of time screen recordings for this Campaign will be retained. After the expiration date, the recording will be deleted.

NOTE: Both audio and screen recording must be enabled for your Contact Center by your LiveOps Professional Services representative.

NOTE: Screen recording is a premium feature. Your LiveOps Professional Services representative can provide more information on adding this feature to your Contact Center.

Outbound Calling

Standard Campaigns can support inbound, manual dial out and automated outbound call types. To configure dial out and/or automated outbound calling in a Standard Campaign, use the options on the Outbound tab.

TIP: You can also create dedicated outbound Campaigns. These Campaigns are not used for inbound calls.

Key Concepts

- Outbound calls are calls that originate from the LiveOps Cloud Contact Center platform and are directed out to a target telephone or device.
- Calls are made to batches of phone numbers known as an **Outbound Batch**.
- Outbound batches can be generated from Report Tool, in the case that LiveOps has the target phone numbers already in the platform. For example, when a caller hung up before reaching an Agent or has explicitly requested a call back.
- Outbound batches can also be created by uploaded phone numbers in bulk
- Outbound calls must conform to limits on calling times and days.
- Outbound calls will not be made to numbers on the **Do not call** list.

From the Agent's point of view, an outbound call is very similar to an inbound call, with a few key differences:

- For LiveOps Agents, the initial script pop contains a screen of information about the caller.
- The call outbound is not initiated until the Agent clicks the "Next" button on the information page.
- The disposition page is customized to suit outbound needs.

Configuring Outbound Calling

You should configure the basics of your Campaign—defining IVRs, assigning Pools, etc.—before configuring outbound options.

1. Select the Routing > Campaigns menu.
2. Click the Add New Campaign button or locate an existing Standard Campaign and click its Edit link.
3. If creating a new Campaign, follow the steps described in Adding a New Campaign.
4. Click the Campaign's Outbound tab.
5. Set the Used for outbound calls field to Yes.
6. Save the Campaign. When the page reloads after saving you will see a number of new options appear.

Table 12-1: Standard Campaign Outbound Tab Fields

Option	Descriptions
Used for outbound calls:	Set to Yes, then save the Campaign to see additional outbound calling options.

<table>
<tr><td>ANI For Customer</td><td>This is the phone number that will be displayed to the customer as the caller ID. Depending on your Contact Center settings, this field can be mandatory or optional. If this field is optional and the field is left blank, then the agent's ANI will be displayed as the caller ID.</td></tr>
<tr><td>Weight</td><td>The weight can be used to prioritize the order in which multiple Campaigns are dialed when there is a significant queue of leads.</td></tr>
<tr><td>Default Expiration</td><td>The duration, in days, the lead will remain active.</td></tr>
<tr><td>Retry Interval</td><td>The number of hours between call retry attempts.</td></tr>
<tr><td>Retry Limit Type</td><td>This determines the way the outbound dialer will limit retry attempts. The following options are available:

Single: This setting instructs the dialer to try to connect to the lead up to Maximum Retries, regardless of time of day.

Figure 12-1: Single

AM/PM: Grants administrator more granular control over when to re-dial. The AM/PM Split determines two buckets where re-dials can occur. In the following example, we are defining 3 re-dials to occur before 2:00PM and 2 re-dials to occur after 2:00PM

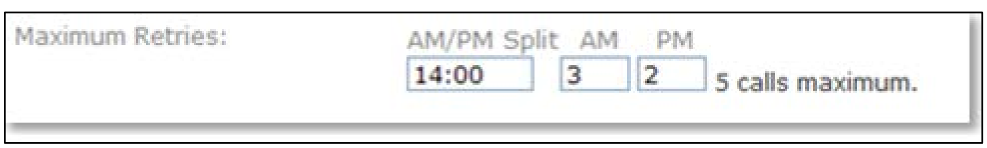

Figure 12-2: AM/PM Split</td></tr>
<tr><td>Maximum Retries</td><td>The maximum number of re-dials per unique ANI before the system automatically expires the lead.

NOTE: To change the Maximum Retries for the AM/PM setting, first select Single, set the Maximum Retries and save the Campaign. You can then change the Retry Limit Type back to AM/PM Split with the new Maximum Retries value.</td></tr>
<tr><td>Outbound Type</td><td>Select from Progressive, Push Preview, or IVR Out.</td></tr>
<tr><td>Use JIT Pop</td><td>Enabling this allows you to specify a "Just in Time Pop"—an informational message to be displayed to the agent during the call.</td></tr>
</table>

Agent Message Text	The message that appears to the agent when the call is connected. Call-related fields may be displayed in this message. **Example:** `Hello, this is ${rep.firstname}, may I speak with ${namefirst} ${namelast}?`
Screen Pop URL	The URL to "pop" when the call is connected. This URL provides an integration point between LiveOps Outbound and external systems. The following options are available: No Screen Pop: No screen pop will be triggered by the call. This is the default setting. Use Lead Preview Screen Pop: Presents a screen pop for each call containing standard information about the lead being called. This setting is required when using the Push Preview dialer. See the Screen Pop URL Parameter section below for more information.
Earliest Time to Call	Set the earliest time an outbound call can be made.
Latest Time to Call	Set the latest time an outbound call can be made.
Days to Call	Select the days outbound calls can be made.
Days NOT to Call	Lets you create a list of specific dates on which outbound calls will not be made.
Automatic Batches	Lets you manage and create outbound batches. *NOTE: An outbound batch is a group of telephone numbers to which you want to place calls. Using this option, batches can be created using the LiveOps Report Tool. Example reports might retrieve the records of callers who requested a call back or who called but abandoned before reaching an agent.*
Upload Numbers to Call	Lets you create an outbound batch from uploaded telephone numbers. *NOTE: Using this option, you can create outbound batches from lists of telephone numbers by uploading them to Contact Center.*

Campaign Priority

The Campaign Priority feature is optional and is turned off by default. Please talk to your LiveOps Professional Services representative if you wish to enable this feature for your Contact Center.

NOTE: The Campaign Priority option determines how queued calls will be sent to Agents. This option lets you set an absolute priority for a Campaign in relation to other Campaigns in the same Contact Center. Calls for a Campaign with a higher Campaign Priority value will be answered before calls to a Campaign with a lower priority value. By default, Campaigns have a priority value of 1. You can set this to a value of from 1 (lowest) to 10,000 (highest). Campaign Priority overrides other call routing factors, such as Queue Time Multiplier.

Consider the following example, using four Campaigns and various Call Priority field values:

Table 13-1: Example Call Priorities

Campaign	**Priority**
Executive Help Line	50
Schedule Conference Center Resources	1
Standard Help Line	50
Password Reset	70

In this example, calls will be routed as follows:

1. The Password Reset Campaign has the highest priority of all (70). Its calls will be sent to an Agent before any other Campaign's calls, regardless of how long the other calls have been in the queue.
2. If there are calls in queue for both the Standard Help Line Campaign and Executive Help Line Campaign, they will be answered based on whichever has been in queue the longest (including Queue Time Multiplier effects).
3. Calls for the Schedule Conference Center Resources Campaign will only be answered when there are no calls from any other Campaign in the in the queue.

If each of the four Campaigns above received calls at exactly the same time, they would be answered in the following order:

1. Password Resets
2. Executive Help Line or Help Line (depending on queue time)
3. Schedule Conference Center Resources

If another call to the Password Reset Campaign arrives after the calls in the previous example but while the first call was still active, this second call would be sent to an Agent ahead of any other calls currently in the queue.

Campaign Priority and Queue Time Multiplier

The Campaign Queue Time Multiplier field causes any calls for that Campaign to appear as if they have been in the queue longer than they actually have. Generally, this means calls from a Campaign with a higher queue time multiplier will be answered sooner than calls with a lower multiplier value. However, as stated above, the Campaign Priority field takes precedence over Queue Multiplier settings.

Standard Campaign Telephony Features

Telephony Tab Options

The Telephony tab lets you configure the options agents have access to while on a call. In general, these options govern the following functional areas:

- Transfer/Conference
- Hold
- After-call wrap up
- Dial out
- Ring behavior and call transition

Table 14-1 lists the options on this tab and gives a brief description of their use. Subsequent chapters explain these options in more depth.

Table 14-1: Standard Campaign Telephony Tab Fields

Option	Description
Transfers to phone numbers will:	Determines how transfers initiated by an agent will be handled. You have two choices: • Remain on the LiveOps platform—Calls transferred with this remain on and can be tracked by the Contact Center platform. • Leave the LiveOps platform—Calls transferred with this option utilize the capabilities of a particular telecommunications carrier to perform the transfer. This option also allows the use of a SIP referral URL to handle the transferred call. *NOTE: Once you've selected a transfer option for a given Campaign, all transfers for that Campaign must be of the same type. If you want to change to the other type, you must first delete all existing transfers.*
Add Transfer Campaign	Adds a new platform transfer destination with the following options: • Transfer To—the target Campaign to receive the transferred call. • Description—the label for this transfer destination. Agents will see this in their Phone Panel. • Normal Transfer—transfers the caller to the destination Campaign with no introductory audio. • Transfer With Audio—allows the transferring agent to record introductory audio which will be heard by the agent receiving the transferred call.
Allow agent to hold/warm transfer via DTMF:	Enables telephone keypad control of transfer and hold features.

Call Transition Time:	Sets the interval between one call ending and the next call being delivered.
Allow agent to do after call wrap up:	Grants the agent additional time for post-call tasks. When set to `Yes`, additional options appear.
Target wrap up time	The average or target length of wrap up time agents should use. This value must be greater than zero and less than "Maximum wrap up time."
Maximum wrap up time	The maximum amount of after call wrap up time, in seconds. When an agent exceeds this time, their wrap up period ends and they are placed back in the pool of available agents.
Enable auto wrap	(Optional) Set this to Yes if you want agents to be automatically placed in wrap up mode after their call has exceeded the minimum time (typically, 30 seconds).
Minimum call length for auto wrap up	(Optional) The minimum length a call must be before automatically placing an agent into wrap up mode. This value must be greater than or equal to zero. This field only appears if Auto Wrap Up is enabled.
Max number rings to agent (or outbound lead) phone.	Sets the maximum number of rings an agent (or the target of an outbound call) will hear before the call will be considered as not answered. *NOTE: We recommend NOT changing this option from the default. Doing so can have a significant impact on call handling metrics.*
Dial-out to arbitrary number using Campaign:	Allows the agent to place calls to arbitrary outside numbers, using the selected Campaign for tracking purposes.
Routing Path (Destination routing group):	Overrides the default routing path for your Contact Center *NOTE: Routing paths allow you to specify flexible carrier paths for call routing. Please contact your LiveOps Professional Services representative if this is a requirement in your Contact Center.*

After Call Wrap Up

Agents are permitted a certain amount of transition time after hanging up the phone before Contact Center sends them a new call. This is the Call Transition Time setting. You can allow Agents extra **Wrap Up** time for record keeping or other additional post call work. There are two modes of wrap up time: manual wrap up and auto wrap up.

Manual Wrap Up—In this mode, Agents must click a Wrap Up button in their Phone Panel to initiate wrap up time after they hang up.

Auto Wrap Up—In this mode, Agents are automatically put into wrap up mode after they have been on the call for a specified amount of time (the **target wrap up time**).

After reaching the maximum wrap up time, Agents will be made available for calls again.

Configuring After Call Wrap Up

1. Select the Routing > Campaigns menu.
2. Click the Add New Campaign button or locate an existing Standard Campaign and click its Edit link.
3. If creating a new Campaign, follow the steps described in Adding a New Campaign.
4. Click the Campaign's Telephony tab.
5. Set the Allow Agent to do after call wrap up radio button to Yes. Table 15-1 describes the additional options that will appear.

Table 15-1: After Call Wrap Up Options

Option	Description
Allow agent to do after call wrap up:	Grants the agent additional time for post-call tasks. When set to Yes, additional options appear.
Target wrap up time	The average or target length of wrap up time agents should use. This value must be greater than zero and less than "Maximum wrap up time."
Maximum wrap up time	The maximum amount of after call wrap up time, in seconds. When an agent exceeds this time, their wrap up period ends and they are placed back in the pool of available agents.
Enable auto wrap	(Optional) Set this to Yes if you want agents to be automatically placed in wrap up mode after their call has exceeded the minimum time (typically, 30 seconds).
Minimum call length for auto wrap up	(Optional) The minimum length a call must be before automatically placing an agent into wrap up mode. This value must be greater than or equal to zero. This field only appears if Auto Wrap Up is enabled.

Agent Dial Out

Dial Out is a telephony feature that allows Agents to transfer a call to any arbitrary telephone number. This feature is not available to all Contact Centers, and only Agents with the proper Attribute set can use it. When you configure Dial Out, you specify a Campaign to act as the **Dial Out Campaign**. This is the Campaign that controls the outbound call. That Campaign provides the telephony features for the transferred call, such as hold and additional transfer options. You can also use that Campaign to report on Agent Dial Out calls.

- Dial Out is not the same as **Outbound**: the former enables an Agent to specify a single target phone number, whereas the latter typically makes calls automatically to batches of phone numbers, directing each inbound leg to an Agent. Further, Dial Out is also not the same as **Direct Outbound**. Direct Outbound uses a web page interface, accessible under the Contact Center Home page, to allow enabled Agents to make outgoing calls without using the Phone Panel.

Configuring Dial Out

1. Select the Routing > Campaigns menu.
2. Click the Add New Campaign button or locate an existing Standard Campaign and click its Edit link.
3. If creating a new Campaign, follow the steps described in Adding a New Campaign.
4. Click the Campaign's Telephony tab.
5. Set the Dial-out to arbitrary number using Campaign drop down menu to the Campaign that will control the dial out call.

NOTE: Your LiveOps Account Manager must enable the Dial Out feature for your Contact Center before you can grant this feature to your Agents.

TIP: The Dial Out feature is enabled for Agents using the "CHAT Dialout" Administrative user attribute. You may have to create the CHAT Dialout attribute if it doesn't exist yet. If so, you MUST name it exactly as shown (including capitalization).

DTMF Control

DTMF control enables Agents to use their telephone keypad to perform hold and transfer actions. This option is mostly used by Agents who do not use one of the LiveOps agent desktops, which provide this functionality in their user interface.

To Enable DTMF Hold/Transfer:

1. Select the Routing > Campaigns menu.
2. Click the Add New Campaign button or locate an existing Standard Campaign and click its Edit link.
3. If creating a new Campaign, follow the steps described in Adding a New Campaign.
4. Click the Campaign's Telephony tab.
5. Set the Allow agent to hold/warm transfer via DTMF radio button to Yes.

Table 17-1 lists the valid DTMF keys and their function:

Table 17-1: DTMF Hold/Transfer Keys

DTMF Keys	Action
81-87	Transfer to Campaigns 1 through 8 (where the numbers one through eight correspond to the Campaign's order in the "Transfer to Campaign" list)
88	Hang-up (disconnect) from the call
41	Place call on hold
47	Retrieve call from hold

Hold

There are two ways an Agent can place a call hold:

- Using the hold button on their agent desktop.
- Using DTMF (touch tone) keys.

When you define a Hold IVR for a Campaign, Agents will automatically see a hold button appear in their Phone Panel when taking a call for that Campaign. The DTMF key method is useful for situations where the Agent is not using the LiveOps Phone Panel, such as Dial Out calls or calls routed as part of a third party integration. The DTMF key method can also be used to transfer the call.

Links Tab

Many configuration pages in Contact Center contain a **Links** tab. This tab contains links to other configuration objects that depend on or are related to the current object, such as:

- The Campaign's parent Program
- Agent Pools
- Offers
- Call Flows
- Incoming Numbers

Clicking a link on this tab will display that item's configuration page.

Maximum Number of Rings to an Agent Phone

This setting controls how long a call is offered to an Agent before rolling over to the next available Agent. Agents who fail to answer a call within the specified will be paused (unable to receive additional calls until they manually unpause).

TIP: This setting is sometimes known on other call center platforms as the "Ring No Answer Timeout."

Configuring Maximum Number of Rings

1. Select the Routing > Campaigns menu.
2. Click the Add New Campaign button or locate an existing Standard Campaign and click its Edit link.
3. If creating a new Campaign, follow the steps described in Adding a New Campaign.
4. Click the Campaign's Telephony tab.
5. Set the Max number rings to agent (or outbound lead) phone option to the desired value.

NOTE: Changing this option from the default values is NOT recommended. Please consult with your LiveOps Professional Services representative before modifying this option.

Transfer

Standard Campaigns provide two ways of transferring calls from an Agent to another party:

- Remain on the LiveOps platform—Calls transferred with this remain on and can be tracked by the Contact Center platform.
- Leave the LiveOps platform—Calls transferred with this option utilize the capabilities of a particular telecommunications carrier to perform the transfer. This option also allows the use of a SIP referral URL to handle the transferred call.

*TIP: The LiveOps platform transfer is sometimes known as **Warm Transfer**. Transfers that leave the LiveOps platform are sometimes known as **Carrier Transfers**.*

Both transfer types are ways of joining 3 call "legs": the caller's leg, the initial Agent's leg and a third party's leg (typically, the third party is another Agent, but this is not a requirement). This allows all three legs to hear each other.

Platform transfer sends a call from one Campaign (the "source") to another Campaign (the "target"). The call persists in the LiveOps platform, meaning it can be manipulated, monitored and reported upon using Contact Center tools and applications. Carrier transfers, on the other hand, send the call to a specific phone number or SIP address. Once the transferring Agent disconnects from the call, that call is no longer tracked by Contact Center (unless the target destination number belongs to another Contact Center Campaign).

NOTE: A Campaign can only be configured to support one transfer type.

Configuring Platform Transfer

1. Select the Routing > Campaigns menu.
2. Click the Add New Campaign button or locate an existing Standard Campaign and click its Edit link.
3. If creating a new Campaign, follow the steps described in Adding a New Campaign.
4. Click the Campaign's IVRs tab.
5. Set the Hold IVR field to Generic Hold IVR (or a custom IVR you've already created).
6. Click the Campaign's Telephony tab.
7. Set the Campaign Transfer Type to Remain on the LiveOps Platform. This will reveal an Add New Warm Transfer Campaign button.
8. Click the Add New Warm Transfer Campaign button.
9. Select the target Campaign from the Transfer To Campaign list.
10. In the Description field, type in a short name for this transfer option. This is the name that the Agent will see in their Phone Panel.
11. Set the Normal Transfer and Transfer with Audio options as desired (see below for details on these options).
12. Repeat steps 5 through 9 for each transfer option this Campaign will have.
13. Click the Save Changes button when done.

NOTE: Before enabling Warm Transfer, you will want to have the source and target Campaigns already configured. You will probably also want at least a generic Hold IVR in place.

Who Gets the Call?

When you use Warm Transfer to a Campaign, the normal call routing rules govern which Agent receives the transferred call. If you want to route directly to a specific phone number but track the call as if it were governed by a particular Campaign, use the Dial Out to Arbitrary Number Using Campaign field (see below).

Normal Transfer vs. Transfer with Audio

A "normal" transfer Campaign behaves as previously described. A variation on this is a "transfer with audio" Campaign. When this option is selected, the transferring Agent can be connected to an IVR, which records any message the Agent wants to leave. When the Agent completes the transfer, the receiving Agent will hear that message prior to speaking directly to the caller. If you select both "normal" and "with audio" options, the Agent may choose which option to use in their Phone Panel application.

Configuring Carrier Transfer

1. Select the Routing > Campaigns menu.
2. Click the Add New Campaign button or locate an existing Standard Campaign and click its Edit link.
3. If creating a new Campaign, follow the steps described in Adding a New Campaign.
4. Click the Campaign's IVRs tab.
5. Set the Hold IVR field to Generic Hold IVR (or a custom IVR you've already created).
6. Click the Campaign's Telephony tab.
7. Set the Campaign Transfer Type to Leave the LiveOps platform. This will reveal an Add Transfer Phone Number button.
8. Click the Add Transfer Phone Number button.
9. Enter the telephone number to transfer to.
10. Enter a Description for this transfer. This is what the Agent will see in their Phone Panel.
11. Repeat steps 5 through 9 for each transfer option this Campaign will have.
12. Click the Save Changes button when done.

NOTE: To enable a carrier transfer Campaign, you may need to have your inbound toll free numbers configured with carrier transfer capability. Your LiveOps Professional Services representative can help arrange this for you. You will probably also want at least a generic Hold IVR in place if you plan to let your Agents put callers on hold before transferring them.

Configuring Outbound Campaigns

About Outbound Campaigns

An Outbound Campaign is essentially a Standard IVR Campaign that is dedicated to outbound calling.

Key Concepts

- Outbound calls are calls that originate from the LiveOps Cloud Contact Center platform and are directed out to a target telephone or device.
- Calls are made to batches of phone numbers known as an **Outbound Batch**.
- Outbound batches can be generated from Report Tool, in the case that LiveOps has the target phone numbers already in the platform. For example, when a caller hung up before reaching an Agent or has explicitly requested a call back.
- Outbound batches can also be created by uploaded phone numbers in bulk
- Outbound calls must conform to limits on calling times and days.
- Outbound calls will not be made to numbers on the **Do not call** list.

From the Agent's point of view, an outbound call is very similar to an inbound call, with a few key differences:

- For LiveOps Agents, the initial script pop contains a screen of information about the caller.
- The call outbound is not initiated until the Agent clicks the "Next" button on the information page.
- The disposition page is customized to suit outbound needs.

NOTE: Outbound is a complex and evolving feature. Please talk to your LiveOps Professional Services representative if you wish to use this feature in your Contact Center.

Configuring an Outbound Campaign

1. Sign into Contact Center using your credentials.
2. Select the Routing > Campaigns menu.

1. Click the Add New Campaign button.
2. Enter a meaningful name in the Campaign Name field. This name will appear throughout Contact Center.
3. Set the Routing Class field to Outbound.
4. Select the Program to which this Campaign belongs.
5. Supply a description or note in the Comment field.
6. Click Save Changes.

After creating the Outbound Campaign, you must perform the following steps:

1. Configure a dialer in the General tab.
2. Set the dialer start/stop times.
3. Define Agent Pools.
4. Upload leads.

Outbound Dialer Types

Outbound Campaigns use automated dialers to process batches of calls. In general, there are four types of automated dialers:

- **Progressive**
  This dialer automatically dials a new lead whenever an agent becomes available. At LiveOps, this dialer also discerns human vs non-human contacts (filtering out busy lines, no-answers, answering machines, fax lines), also known as Answering Machine Detection. This method of dialing provides improvement in agent productivity by an order of magnitude when compared to the manual dialing. Agents must be constantly "pinned-up" in order to receive contacts from a Progressive Dialer. Progressive Dialing is also known as Power Dialing.

- **Push Preview**
  Unlike Progressive/Predictive Dialers, this dialer does not require an agent to be pinned-up. The Preview Dialer first provides information regarding the lead to the agent before initiating a call. The agent reviews the information to formulate a calling strategy and when ready, presses a button to begin the call. This method strikes a balance between agent productivity improvements via automation and the customer experience. The agent productivity increase is significant when compared to manual dialing but is modest when compared to Progressive Dialing.

- **IVR Out**
  This dialer requires no agents to be available on the call. Instead, an IVR (Interactive Voice Response) is used to play an audio message to the caller. At LiveOps, this dialer also utilizes Answering Machine Detection.

LiveOps Outbound supports all three of the automated dialers listed above. The fourth type, known as a Predictive Dialer, typically dials multiple leads simultaneously with the expectation that an agent will be available whenever a call is answered by a live person. It uses historical data to predict when an agent might become available and places multiple outbound calls to ensure that a live person is on the line whenever the agent becomes available. This method of dialing generally provides the highest agent utility rates at the risk of increased customer abandonment rates and lower customer satisfaction. LiveOps Outbound does not support predictive dial at this time.

Outbound Campaign General Tab Options

Table 24-1 lists the fields available on the Call Flow based Campaign's General tab:

Table 24-1: Outbound Campaign General Tab Fields

Name	Descriptions
Campaign Name	Specify a Campaign name that appears to agents.
Status	Determines the visibility of this Campaign in the Campaign list: • Active—this Campaign will show up in the Campaign list page • Retired—this Campaign will not appear in the list page unless the "Show Retired Campaigns" checkbox is selected
ANI	This is the phone number that will be displayed to the customer as the caller ID. Depending on your Contact Center settings, this field can be mandatory or optional. If this field is optional and the field is left blank, then the agent's ANI will be displayed as the caller ID.
Weight	The weight can be used to prioritize the order in which multiple Campaigns are dialed when there is a significant queue of leads.
Default Expiration	The duration, in days, the lead will remain active.
Retry Interval	The number of hours between call retry attempts.
Retry Limit Type	This determines the way the outbound dialer will limit retry attempts. The following options are available: Single: This setting instructs the dialer to try to connect to the lead up to Maximum Retries, regardless of time of day.  Figure 24-1: Single AM/PM: Grants administrator more granular control over when to re-dial. The AM/PM Split determines two buckets where re-dials can occur. In the following example, we are defining 3 re-dials to occur before 2:00PM and 2 re-dials to occur after 2:00PM

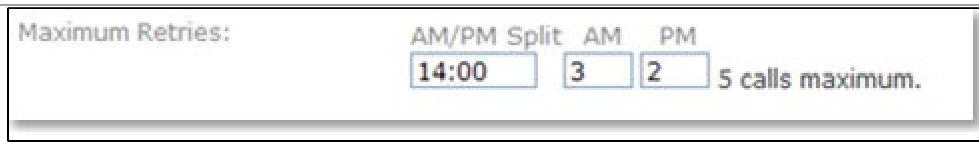

Figure 24-2: AM/PM Split

Maximum Retries	The maximum number of re-dials per unique ANI before the system automatically expires the lead. *NOTE: To change the Maximum Retries for the AM/PM setting, first select Single, set the Maximum Retries and save the Campaign. You can then change the* ***Retry Limit Type*** *back to AM/PM Split with the new Maximum Retries value.*
Dialer Type	Select from Progressive, Push Preview, or IVR Out.
Message to Agent	Enabling this allows you to display an informational message to the agent at the beginning of the call.
Agent Message Text	The message that appears to the agent when the call is connected. Call-related fields may be displayed in this message. **Example:** `Hello, this is ${rep.firstname}, may I speak with ${namefirst} ${namelast}?`
Screen Pop URL Selection	Determines the agent's screen pop behavior: No Screen Pop: No screen pop will be triggered by the call. This is the default setting. Use Lead Preview Screen Pop: Presents a screen pop for each call containing standard information about the lead being called. This setting is required when using the Push Preview dialer. Specify Screen Pop URL: Displays an input field for you to enter an arbitrary URL to pop.
Screen Pop URL	The URL to "pop" when the call is connected. You can pass parameters generated by Contact Center to this URL.
Comment	Enter any notes or descriptions here.

Outbound Campaign Telephony Tab Options

Table 25-1 describes the Outbound Campaign Telephony tab options.

Table 25-1: Outbound Campaign Telephony Tab Options

Option	Description
If there are no agents available when caller connects, then play this audio.	Select an audio prompt from your Audio Library to play in the event an outbound call connects to a customer, but no agents are available to handle the call.
Allow agent to do after call wrap up:	Grants the agent additional time for post-call tasks. When set to Yes, additional options appear.
Target wrap up time	The average or target length of wrap up time agents should use. This value must be greater than zero and less than "Maximum wrap up time."
Maximum wrap up time	The maximum amount of after call wrap up time, in seconds. When an agent exceeds this time, their wrap up period ends and they are placed back in the pool of available agents.
Enable auto wrap	(Optional) Set this to Yes if you want agents to be automatically placed in wrap up mode after their call has exceeded the minimum time (typically, 30 seconds).
Minimum call length for auto wrap up	(Optional) The minimum length a call must be before automatically placing an agent into wrap up mode. This value must be greater than or equal to zero. This field only appears if Auto Wrap Up is enabled.

Outbound Campaign Dialer Start/Stop Tab Options

The Dialer Start / Stop tab fields let you configure when the dialer will make calls. You can determine a default calling schedule for the dialer as well as specify blackout periods when you do not want the dialer to call.

Dialer Time Zone

If the uploaded leads file provides a local timezone for the lead, then the dialer settings will assume that timezone. For example, if a lead's timezone is 8 (Pacific Standard Time) and the dialer is set between 6:00PM and 8:00PM, then the lead will be dialed between 6PM and 8PM PST. If no timezone is provided, then the dialer assumes EST.

Dialer Configuration

Table 26-1: Dialer Start / Stop Tab Options

Option	Description
Earliest Time to Call	This specifies the earliest time that this Campaign can start making calls.
Latest Time to Call	This specifies the latest time that this Campaign can call.
Days to call	Use the check boxes to allow the Campaign to dial on those days.
Dialer Blackout Periods	Specify blocks of time during which the dialer will not make calls. For example, you can prevent calling during the lunch hour.
Days not to Call	Specify DNC (Do Not Call) days, for example, national or local holidays, state specific DNC days, etc.

NOTE: "Days NOT to call" and "Dialer Blackout Periods" settings supersede other settings.

Assign Outbound Agent Pools

Agents who share similar Routing Attributes belong to the same Pool. You can create general Pools that admit all of your Agents, as well as more selective Pools, where only your best Agents, or those with a particular skill will be admitted, depending on how you set up your Attributes.

- The Pools tab in the Campaign Edit page allows you to assign previously created Pools. To create a new Pool, use the Routing > Pools menu.

Editing Agent Pools

1. Select the Routing > Campaigns menu.
2. Click the Add New Campaign button or locate an existing Campaign and click its Edit link.
3. Click the Pools tab.
4. Click the Add Pool link.
5. Use the Pool drop down menu to select the Pool you wish to assign.
6. Repeat steps 4 and 5 to add additional Pools.
7. (Optional) Adjust each Pool's weight (described below).
8. Click Save.

Pool Fields

Table 27-1 describes the Pool configuration options.

Table 27-1: Pool Tab Options

Option	Description
Pool	The Pool name. You can choose from all the Pools defined in your Contact Center. You can assign multiple Pools to a Campaign.
Weight	If you assign more than one Pool to a Campaign, Contact Center distributes calls to those Pools randomly, unless you change the Pool *weighting*. Weighting sets the probability that a Pool will be used, balanced against the weights of the other Pools in your Campaign. By default, each Pool you assign to a Campaign has an equal chance of being selected to handle an incoming call. If you want Agents in a particular Pool to get special consideration, adjust that Pool's weight accordingly. For example, if you have two Pools assigned to a particular Campaign (Pool A and Pool B), and you want the Agents in Pool B to be twice as likely as those in Pool A to get the call, then assign a weight of 2 to Pool B. Setting a weight to zero will cause this Pool to be used only if no available Agents were in the non-zero weight Pools.
Agents (Online)	The number of Agents currently online who belong to this Pool.
Agents (Total)	The total number of Agents who belong to this Pool.

Working With Agent Pools

Table 27-2: IVR Controls

If you want to...	...then do this
Change the Pool order	Use the up and down arrow widget to change the display order of this Campaign's Pools. *NOTE: The order in which Pools are listed has no effect on call routing.*
Edit the Pool	Click the Edit button to edit a Pool directly.
Delete a Pool	Use the X widget to delete a Pool from this Campaign. *NOTE: Deleting a Pool from a Campaign does not delete the Pool itself.*

Manage Outbound Leads

A lead is a customer that you want to contact using a dialer. Leads can be uploaded in bulk from csv (comma separated values) text files. Once uploaded, leads remain *open* until they are resolved. A lead can be resolved if:

- the lead is connected with an agent and the agent dispositions the call
- the lead is expired according to the settings in the General Tab
- the lead is deleted from the Leads Tab

From the Leads Tab, you can add, delete and preview the list of leads that you want to call using this Outbound Campaign.

To bulk upload leads:

1. Select the Routing > Campaigns menu.
2. Click the Add New Campaign button or locate an existing Outbound Campaign and click its Edit link.
3. If creating a new Campaign, follow the steps described in Adding a New Campaign.
4. Select the Leads tab.
5. Click the Add Bulk Leads button.
6. Provide a Batch Name. You can filter your list of leads by this name.
7. Click inside the Upload CSV File field or click the Browse button to select the file that contains your leads.
8. Click Upload Leads.

After uploading, you can preview the status of your lead batch by returning to the Leads Tab. This preview will be updated periodically as the dialer progresses through its lead list.

NOTE: CSV format requirements and a sample file are available in the Need Help call out.

NOTE: Duplicate leads, based on phone number, will be filtered out of your leads list for this Campaign.

NOTE: The Full Name and State fields may require 1 to 2 minutes before appearing in the lead list.