Campaign

Administrators can upload leads or contacts, define dialing priority, schedule strategy, configure campaigns to provide callbacks (which can be initiated based on the request of a customer to be called back, or automatically initiated by the system based on failure to contact the intended person). In addition to the campaign management features, advanced campaign management capabilities such as execution of complex dialing plans, flexible list management, and campaign automation are also available.

The **Campaign** module performs the following tasks:

- Manage campaigns

- Configure business parameters

- Configure contact selection strategies

- Configure campaign chaining

- Upload contacts

- List information

- Scrub contacts

- Manage contacts

- Configure campaign holidays

- Schedule a campaign

- Re-assign agents to a campaign

- Configure server scripts

- Build expressions for a contact selection strategy

- Create categories based on outcomes and set targets

The **Voice** channel campaigns on LCM are generally based on the contact lists that are uploaded to campaigns. A shared campaign allows you to share contacts from a single list across multiple entry points.

Before You Start

As a prerequisite to creating a campaign, make sure that Webex Contact Center entry points, queues, and routing strategies to associate with your campaign have been created. For more information, see the *Cisco Webex Contact Center Setup and Administration Guide*.

- After creating an outdial entry point in Webex Contact Center, you must enable it on the LCM Group page to make it available for selection when you create a Progressive campaign. For more information, see Group.

- When you create a Preview campaign, you select the teams that will handle the campaign from a list of agent-based teams that have been configured in Webex Contact Center. In the case of Progressive campaigns, the team assignment needs to be configured in the Webex Contact Center Routing Strategy module.

- For both Preview and Progressive campaigns, the call flow and queue assignments must be configured as you would configure them for any Webex Contact Center outdial entry point.

In addition, the following LCM-specific entities must be defined:

- **Mode**—The various methods you can use to reach a customer. Examples of modes are Home Phone, Work Phone, Mobile (Voice). For more information, see Modes.

> **Note** Although you will find references to SMS, Email, and other multimedia channels, those are not supported in this release.

Contact Strategy—Contact Strategy is about configuring a set of rules for various modes. This set of rules decides the mode on which a contact is reached (usually based on the weight assigned to the mode), the time at which a contact is reached on a specific mode, the time when retries are dialed out on configured modes, and so on. For more information, see Contact Strategy.

Time Zone—The list of time zones configured for the outbound campaign. This is relevant for campaign execution and also dialing out contacts in their respective time zone. For more information, see Time Zones.

Getting Started

To access the Campaign module:

- Click **Campaign** in the menu pane on the left. The **Campaign** Home page appears.

Existing campaigns, if any, are listed in the content area. The following details for each campaign are listed:

- **Channel** like Voice, Email, SMS, or a combination of voice and non-voice

- **Campaign** name

- **Group** that the campaign belongs to

- **Start Date**—Daily Start Time

• **End Date**—Daily End Time

• **Status** and **Completed**:

- **Created**—Immediately after a campaign is created and yet to start dialing contacts.

- **Executing**—Campaign in a running state, that is, dialing contacts.

- **Stopped**—A campaign is not running.

- **Completed**—The percentage of contacts dialed out (from the total number of contacts uploaded).

• **Action** to be taken, if any, from the following:

- **Stop** or **Start** the campaign.

- **Copy** creates a new campaign with all properties of the selected campaign (except Campaign Name) retained as is.

- **Flush** closes all pending contacts available in the dial list to make sure there is no residue of contacts in the dialer.

Note In-progress contacts are not flushed.

- **Edit** any property in the campaign.

- **Delete** a campaign.

Create a Campaign

To create a new Campaign:

Step 1 Click the **Floating Action Button (FAB)**. This button is located at the bottom right corner of the page.

Step 2 Create a campaign by completing four wizards. The wizards are:

• Campaign Detail

• Campaign Group

• Contact Strategy

• Configuration Options

Campaign Detail

To create a Campaign Detail:

Before you begin

Step 1   Enter a **Campaign Name**.

Step 2   Enter a **Description**.

Step 3   Select a **Date Range** for the campaign. The campaign operates between the start date and end date selected in this range, both days inclusive.

Step 4   Select a **Time Range** for the campaign. The campaign operates on all days (in the selected date range) between the selected times.

Step 5   Select a **Business Outcome Group** from the drop-down list.

Step 6   From the **Time to Live (days)** counter, select the number of days. Time to Live is the number of days that the contacts uploaded, via the auto upload feature, for this campaign are live.

Step 7   Select a **Time Zone** for this campaign.

> **Note**   If you do not have a time zone that applies to this campaign, create a new Time Zone Group by clicking the **Add** button. For more information, see Time Zones.

The various locations across the world are divided into time zones based on the longitudesthey are situated in. The application has a provision where system-wide time zones can be configured. The application can be used at various locations to run campaigns. These locations can be scattered across different continents or even different locations in the same continent. Being far apart, the campaigns may need to run in the working hours of each specific location. The application is designed to work in multiple time zones.

Step 8   Click the **Next** button to complete the screen and navigate to the **Campaign Group** wizard.

Campaign Group

Before you begin

Step 1   Select the **Voice** check box.

Step 2   Select the type of campaign group from **Dedicated Campaign Group** or **Shared List**.

> **Note**   Skip to Step 5 if you selected **Shared List**.

Step 3   Select a **Pacing Mode**.

- **Preview**—Preview campaigns give the agents the control to dial out a call after previewing account information.

- **Progressive**—This is automatic calling based on contact queue. A number is dialed out right after the previous call has ended.

Step 4   Do one of the following:

- If this is a **Progressive** campaign, select an entry point from the drop-down list.

> • If this is a **Preview** campaign, select one or more teams in the **Available Team** list and click the right-arrow to move them to the **Assigned Team** list.

Step 5   Click the **Next** button to complete the screen and navigate to the **Select Contact Strategy** wizard.

Contact Strategy

Before you begin

Step 1   Select a **Contact Strategy** for the campaign. The following options are available:

- **Simple**—A simple strategy is, as the name suggests, simple. It is easily configurable, and just moves on calling from one configured mode to another in a cycle. The cycle is repeated until the configured number of cycles are completed. It serves its limited purpose in certain types of campaigns that do not require any advanced contact handling methodology.

- **Advance**—An advanced strategy is to build a complete rescheduling strategy. You can use multiple modes, retries, priorities, spread across multiple cycles, contact statuses, and more. You can also set dialing rules based on outcomes, telephony outcomes for modes and also business outcomes. This type of strategy leverages the maximum out of the application to dial out almost every uploaded contact.

Step 2   After selecting the button for **Simple** or **Advance** strategy, select an appropriate **Contact Strategy** for this campaign from the drop-down list.

> **Note**   If you do not have a **Contact Strategy** that applies to this contact, create a new strategy by clicking the **Create Contact Strategy** button. For more information, see Create a Contact Strategy.

Step 3   From the number panel, select the **Global Retry** required. The maximum number of retries that can be made for dialing each contact in the campaign. The contacts are not dialed after the global retries are exhausted.

> **Note**   However, the number of retries on each day of the campaign is subject to the limit you configure in the **Daily Retry** field.

Step 4   From the number panel, select the **Daily Retry** required. This is the maximum number of retries that can be made for dialing each contact in a day for this campaign.

Step 5   If your Contact Strategy is a Simple Strategy:

a) Select a number for **Cycle Retry**. This is the number of cycles that the contact strategy operates before closing the contact.

b) Select a **Cycle Retry Interval**. This is the interval between one cycle of retries and the next. For example, assume you choose 2 cycle retries, and the first retry concludes at 6.00 pm on Monday. The Cycle Retry Interval is set for 0 days, 14 hours, and 0 minutes. The next cycle of retries commence at 8.00 am the next day.

c) Skip to Step 10.

Step 6   Turn the **Close Daily Retries** switch **ON** to close the contact after the daily retry limit is reached.

> **Note**   • The contact is closed even if Global Retry setting allows more dialing attempts.
>
>   • Skip to Step 10 if you do not want to configure a **Transition Window**.

Step 7   If a **Transition Window** is to be applied to this campaign, turn the **Transition Window** switch **ON**.

Transition Window offers the ability to constrain or limit the number of attempts for each mode across a defined duration threshold. For more information, see Transition Window.

Step 8   From the **Transition Duration (Days)** number panel, select the number of days in the Transition Window to keep count of the attempts.

Step 9   From the **Transition Attempts** number panel, select the number of attempts allowed in a Transition Window.

Step 10   Select an appropriate **Callback Strategy** for this campaign from the **Callback Strategy** drop-down list.

> **Note**   If you do not have a Callback Strategy that applies to this contact, create a new strategy by clicking the **Create Callback Strategy** button. For more information, see Create a Contact Strategy.

Step 11   Select the **PCB to NCB** reset.

A contact marked as Personal Callback contact can be converted to a regular callback contact under certain circumstances like repeated failure to reach the specified agent. To avoid not reaching the contact at all, this is converted to regular callback to reach any other available agent. Available reset options:

- **Retries**—To configure the number of attempts after which a Personal Callback becomes a Normal Callback.

- **Duration**—The duration in Days, Hours, and Minutes after which a Personal Callback becomes a Normal Callback if the assigned agent does not answer the call.

Step 12   Turn the **Reset Daily** and **Global Retries** switch **ON** if all you want the Global and Daily Retry counts to be reset to zero on moving a contact to Callback.

Step 13   Use the number panel to set the number **Attempts to reach Agent**, the application makes these many attempts to reach an agent before converting a Personal callback to a Normal callback.

Step 14   Click the **Next** button to complete the screen and navigate to the **Configuration Options** wizard.

Configuration Options

> **Note**   Ignore the **Email Server** and **SMS Server** settings. Email and SMS campaigns are not supported in this release.

Before you begin

Contact Strategy, on page 5

Step 1   Optionally enter a **Prefix**. A Prefix is the string prefixed to the uploaded contacts at the time of delivery to the dialer.

Step 2   Optionally enter a **Suffix**. A Suffix is the string suffixed to the uploaded contacts at the time of delivery to the dialer.

Step 3   Turn the **Chaining** switch **ON**, if you want the contacts of this campaign to be chained to other campaigns.

Campaign chaining allows you to re-allocate closed contacts from one campaign to another, based on your business requirements. Campaign chaining can happen either on business outcome or on telephony outcome. This chaining is based on how you have configured the chaining rules. For more information, see Chaining, on page 11.

Step 4 Because PEWC screening is not available in this release, the **PEWC** switch has no effect.

PEWC is **Prior Express Written Consent**. This compliance mandates that telemarketers obtain the prior express written consent of the called party for auto- dialed or prerecorded telemarketing calls to wireless numbers and prerecorded calls to residential landlines. PEWC is the responsibility of the enterprise setting up outbound campaigns. The enterprise needs to make sure that the numbers being uploaded for a campaign are PEWC complaint.

Step 5 Turn the **DNC** switch **ON** if you want DNC screening for contacts enabled for this campaign.

DNC is **Do Not Call** (registry). Certain telecom regulatory authorities have given the option to phone users to mark themselves as DNC customers. No person or organization shall make an unsolicited call or send an unsolicited SMS to a phone that is listed as DNC.

Step 6 Turn the **NDNC** switch **ON** if you want NDNC screening for contacts enabled for this campaign.

NDNC is **Do Not Call** (registry) at a national level. If a number is registered under NDNC, then no person or any organization in the registered country (where the number is registered) shall make an unsolicited call or send an unsolicited SMS.

Step 7 If you have a pre-call script to run before every call, turn the **Precall Script** switch **ON**.

A **pre-call** script ascertains from an external database whether a customer should be called or ignored before calling a customer. For more information, see Server Scripts, on page 23. Choose from the following options:

- **Library**—Select a script from the script library.

- **VBScript**—Execute a custom-written script.

Step 8 If you have a post-call script to run after every call, turn the Postcall Script switch **ON**.

Post-call scripts can be used to embed custom scripts (also known as post-call scripts), leveraging the Managed Extensibility Framework (MEF) of the LCM platform. Using these custom scripts we can now implement custom business logic and integrate with third-party applications by invoking APIs or performing database commands. Choose from the following options

- **Before Reschedule**—Run the script before rescheduling the contact (can change various parameters which could influence the reschedule logic through custom logic) select a script from the script library.

- **After Reschedule**—After rescheduling the contact (can use the reschedule information to further enrich or change the strategy and use the information to update external platforms).

- **Both**—Run the script both before and after the contact reschedule.

Step 9 If your contacts have to be dialed in conformance with a **State Law**, turn the switch **ON**.

Various geographical regions like states, countries, and so on have laws that regulate contact center operations. These laws can be configured at the application level and chosen as applicable to campaigns. For more information, see State Law.

Select any one of the three options:

- **State**—The state law compliance for this campaign is as per the State configured in System, application wide configuration.

- **Zip Code**—The state law compliance for this campaign is as per the zip code that is configured in System. The state law of the state belonging to this zip code is applied.

- **Area Code**—The state law compliance for this campaign is as per the area code that is configured in System. The state law of the state belonging to this area code is applied.

Step 10 Click the **Save** button to save the campaign.

Proceed to configure the various requirements for the newly created campaign.

Configuring the Campaign

After creating the campaign, there are various other aspects that you have to configure to get the campaign working as you want it to. This section deals with configuration of the following elements:

- Business Parameter
- Contact Selection Strategy
- Chaining
- Contact Lists
- Manage Contacts
- Schedule
- Scrub
- Other Configurations

Each of the above menu options can be placed as a **Quick Link** on the application Home page. Click the **Link** button icon on the page header. This page is now available for view or edit on a single click directly from the application Home page.

Business Parameter

Business Parameter is business-specific data that can be used for a various purposes. Some uses are:

- Associate this data to contacts at the time of upload.
- Define custom conditions for CSS to define a dialing strategy.
- Query these parameters and manage contacts based on query results.
- Populate these parameters on agent desktop as screen pop during a call. You can create a total of 25 business parameters.

You can also create a unique identifier. Ideally, there may be identical business fields across campaigns that may be required to be grouped for various purposes. For example, Customer ID can be a business field across campaigns for which grouping is necessary in reports. However, Customer ID can be the first business field in Campaign A; sixth in Campaign B; and tenth in Campaign C. If you create this business field as a Unique Identifier field, it is possible to group data from these fields.

To create a Unique Identifier:

Step 1   Click the **Add Unique Identifier** button to add a unique identifier.

Step 2   Complete the following fields:

- Enter a **Unique Identifier**.

- Click **Save**.

Create a Business Parameter

Click the **Add** button to add a new business parameter. Complete the following fields:

Step 1   Enter a **Business Parameter Name**.

Step 2   From the **Data Type** drop-down list, select a **Data Type** for this business parameter. Available options are:

- **Number**, for numeric data.

- **Float**, for numbers with decimal values.

- **DateTime**, for values that represent date and time. If you select this data type, select a desired date format in the **Format** field.

- **String**, for alphanumeric data that includes any character.

Step 3   Select a **Dimension** from the drop-down list, if available. Dimensions help build customized reports based on business fields. For more information, see Dimension.

Campaigns have business parameters, some mandatory and some optional, configured according to certain campaign-specific requirements. For example, Sales Channel may be the second business parameter in one campaign and fifth in another. At the campaign level, reporting based on business parameters is possible. However, at the enterprise level, should you require information of sales across various channels and across various campaigns, Dimension is the way to go. You can map similar business parameters across campaigns, no matter where they are configured, under one dimension.

Step 4   Turn the **Large Data** switch **ON** to define this business parameter as a bulk field. Business Parameters defined as large data fields have no restriction on the field length for data that goes in as business parameter.

Step 5   In this release, the Agent **View/Edit** button has no effect. Agents cannot edit the business field.

Step 6   Turn the **DNC** switch **ON** to mark this business field as **Do Not Call** (DNC). This allows the application to determine that a call to a contact based on this business field is subject to DNC rules.

        Note   You can mark only one of the 25 business fields as DNC.

Step 7   Click **Save** to complete creating a business field or click **Cancel** to revert with no information saved.

Step 8

Step 9   The number of business fields created and the number available are displayed in the top right corner of the grid.

Step 10   Using the **Reorder** button you can reorder the business fields.

Contact Selection Strategy

A contact selection strategy (CSS) defines how you prioritize your contacts for dialing in an LCM campaign. For example, you may have three categories of credit cardholders on your campaign, Platinum, Gold, and Silver. By configuring a CSS, you can ensure that your LCM Console pushes a specific percentage or number of Platinum contacts and, or Gold and Silver contacts.

Default CSS Conditions

There are five default CSS conditions that can be applied to a campaign, besides any conditions that you may want to create. An overview of the dialing pattern for these five default CSS conditions:

- **Contact Priority Calls - New Contacts**—These are contacts that LCM has not delivered to the Dialer from the latest upload to the oldest upload.

- **Contact Priority Calls - Old Contacts**—These are contacts that have not been delivered to the Dialer from old uploads.

- **Specific Moment**—Contacts that you have rescheduled to be dialed out at a specific moment.

- **Specific Agent**—Contacts that have been tagged to be dialed out to reach a specific agent.

- **Specific Agent with Specific Moment**—Tagged contacts that have been rescheduled to be dialed out to reach a specific agent at a specific moment.

In addition to these five CSS conditions, you can create your own CSS conditions and prioritize the order in which your contacts reach the dialer.

Create a CSS Condition

Click the **Add New** button to add a new CSS condition. Complete the following fields:

Step 1   Enter a **CSS Group Name**.

Step 2   Turn the **Advanced Builder** switch **ON** if you want to build an Advanced CSS Condition.

Note
- An Advanced Builder requires meticulous condition building where using multiple open and closed brackets, conditions are placed manually. Any incorrect placement of such brackets may result in the CSS condition selecting wrong and unintended contacts for delivery to the dialer.

- On the other hand, if the **Advanced Builder** switch is **OFF**, you can add conditions in groups, with pre-selected and, or conditions.

- Skip to Step 11, if you are using the simple condition builder.

Step 3   Enter an open bracket - **(** - in the first cell.

Step 4   From the **System Fields**/**Business Parameters** drop-down list, select an appropriate item.

Note   If you select System Fields ListID or Global ListID, a pop up allows you to select the appropriate list from the available lists.

Step 5   Select a compare option, this is the condition that the field should satisfy for a contact to be selected. Some comparison parameters for your condition could be (greater than), < (lesser than), = (equals), and so on.

Step 6   Enter a value that this condition should meet for the contact to be selected for delivery.

Step 7   Close the bracket.

Step 8   Click the **Add** button to add another condition.

Step 9   Complete Steps 3 through 7. Add as many conditions as you require for your CSS.

Step 10   After you are done with conditions, click **Save** to complete.

Step 11   If you are not using the Advanced Builder, use the simple builder.

Step 12   From the **System Fields**/**Business Parameters** drop-down list, select an appropriate item.

> **Note**   If you select System Fields ListID or Global ListID, a pop up allows you to select the appropriate list from the available lists.

Step 13   Select a compare option, this is the condition that the field should satisfy for a contact to be selected. Some comparison parameters for your condition could be (greater than), < (lesser than), = (equals), and so on.

Step 14   Enter a value that this condition should meet for the contact to be selected for delivery.

Step 15   Close the bracket.

Step 16   Click the **Add** button to add another condition.

Step 17   In the new line, select either **AND** or **OR** from the decision drop-down list.

Step 18   You can keep adding more such condition groups. Click **Save** when you are done.

Step 19   If you want to add more groups, select the **Add** button from the **Group Action**.

Step 20   Repeat Steps 11 through 16.

Step 21   Navigate to the **Order By** section decide the order in which you want the contacts to be delivered to the dialer, ascending or descending.

Step 22   From the **System Fields**/**Business Parameters** drop-down list, select an appropriate item.

Step 23   From the Sort drop-down list, select **Asc** or **Desc** for Ascending or Descending sort, respectively.

Step 24   To add more sort orders, click the **Add** button.

Step 25   Once done with sort orders, click **Save** to complete CSS conditions.

> **Note**   You can skip creating conditions and select any Default CSS condition.

Chaining

Campaign chaining allows you to re-allocate closed contacts from one campaign to another, based on your business requirements. You can chain contacts to campaigns based on either business outcome or on telephony outcomes.

Configure the chaining rules in LCM Console for contacts to be chained from one campaign to another.

Mapping

Step 1   In the **Name** field, enter a **Mapping Name** for this chaining configuration.

Step 2   From the **Target Campaign** drop-down list, select one to chain selected contacts from this campaign.

Step 3   The **Modes**mapped to the target campaign are shown in the **Target Modes** field. For each of these modes, the modes of the source campaign are shown in the drop-down list. Select a mode from the source campaign to map to a mode in the target campaign.

Step 4   The **Target Business Fields** shows all the **Business Fields** mapped in the **Target Campaign**; the **Source Business Fields** are shown in a drop-down list. Map each **Target Business Field** to one **Source Business Field**.

Step 5   Complete the **Reschedule After** field by selecting the **Days**, **Hours**, and **Minutes**from the number panel. This is the time at which the contact is dialed next, in the target campaign, after successful campaign chaining.

Step 6   Select the **Fresh Contacts** check box if you want the contact to be marked as fresh in the target campaign. Selecting this means the contact is sent to the dialer immediately.

Step 7   Click the **Save** button to complete the mapping.

Outcomes

Navigate to the **Outcomes** section to map the **Outcomes** from the **Source** to the **Target** campaign. Follow the steps listed below to accomplish this.

Step 1   From the **Saved Mapping** list in the left pane, select a mapping.

Step 2   The **Business Outcome Group** and the **Telephony Outcome** for the chosen mapping is now available for chaining. You can choose to chain both **Business Outcomes** and **Telephony Outcomes** in a single mapping or two different mappings.

Step 3   All the **Business Outcome Groups** for this campaign are populated in the **Group Name** drop-down list. Select a **Business Outcome Group**.

Step 4   All the outcomes under to this **Business Outcome Group** are populated. Select the required **Business Outcomes** for chaining.

Step 5   From the **Telephony Outcome** pane, first select the Mode from the drop-down list. All the **Modes** available in the source campaign are displayed for selection.

Step 6   All the **Call Strategies** that use the selected **Mode** are now displayed in the **Strategy Name** drop-down list.

Step 7   All the **Telephony Outcomes** for the selected **Mode** and **Contact Strategy** pair are listed. Select the **Telephony Outcomes** for chaining.

Step 8   Click the **Save** button to complete the chaining.

Step 9   The **Mapped Outcomes** tab contains all the mapped **Business** and **Telephony** outcomes. Select either **Business Outcome** or **Telephony Outcome** under the **Mapped Outcomes** tab to see all chaining mappings.

Step 10   Click the **Edit** button to edit any chained mapping.

Contact Lists

The **Contact Lists** page helps you upload contacts to a campaign. Contacts can be uploaded from flat files with pre-defined separators, files with comma-separated values, database tables, and so on. The **Contact Lists** page shows, at a glance, all the contact lists that you have uploaded to the campaign.

Step 1   Click the **Floating Action Button (FAB)**.

Step 2   Click **Upload Contacts FAB** to upload contacts.

Step 3 In the **SourceType** field, select **FormattedFile** to specify that the contacts are available in a formatted file with various fields separated by a common separator or a comma-separated file.

The **Database Table** and **Database View** options are not applicable in this release.

Step 4 Complete the following:

a) Click the **ChooseFile** button and choose a file that contains the contacts for upload.

b) From the **Delimiter**drop-down list, select a delimiter that separates various fields in your contact upload file.

Step 5 If you have a **Profile** for this upload, select one from the **Profile** drop-down list. Selecting a **Profile** ensures all further mapping for this contact list file is automatically accomplished as configured in the Profile.

Skip this step if you do not have a Profile for mapping.

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

Step 6 For all the uploaded contacts, complete **Field Mapping**.

- **Priority**—The priority you want to set for this contact. The higher the priority, the earlier the contact is delivered to the Dialer. Do not make a selection if you want all the contacts to be treated equally.

- **Zone Name**—The zone name applicable to the contacts. Available choices are: Campaign-specific Time Zone, Zip Code-specific Time Zone, and Area-specific Time Zone.

- **Area Delimiter**—The delimiter used to separate components of a contact telephone number. This is enabled only if your Zone Name is Area-specific Time Zone.

- **State Name**—The geographical state to which these contacts belong.

- **Zip Code**—The zip code applicable to the contacts.

- **Additional Zipcode**—The additional zip code applicable to the contacts.

  Note   A configuration file setting controls permission to this feature.

  There are many instances that some contacts have different modes to reach (say Home, Mobile, Work). It is also quite possible that all these modes are at different locations. LCM offers the flexibility of configuring different zip codes for each mode. This enables calls to be dialed out based on the time zone in which the zip code is located, taking due care to avoid any statutory restrictions in dialing.

  Note   - It is not mandatory to enter an additional zip code. Where an additional zip code has not been entered, the primary zip code applies.

  - When an invalid zip code is entered for a contact, the specific contact is rendered invalid and is not dialed out.

  - When an invalid zip code is entered for a mode, the specific mode is rendered invalid and is not dialed out.

- **Contact Moment**—A specific date and time to dial out a contact.

- **Moment Date Format**—The date format for the Contact Moment.

- **Agent ID**—The agent ID for the contact.

Step 7 Proceed to **Mode Mapping**.

- **Modes**—All **Modes** configured for the campaign are displayed for mapping.

- **Fields**—Select an appropriate **Field** for this mode from the uploaded. Complete mapping for all displayed modes.

- **Zip Code**—Select an appropriate **Zip Code** for this mode from the uploaded. Complete mapping for all displayed modes.

Step 8 Map **Business Fields** next. All **Business Fields** defined for this campaign are displayed in the first column. The fields forming part of the contact upload file are displayed in the **Value** drop-down list. Map each **Business Field** to a **Value** in the contact field.

Step 9 The **Optional Business Field** column contains all the fields forming part of contact file. Select check boxes for fields that you want to be treated as **Optional Business Fields** for this campaign.

Step 10 Ignore the settings in the **Message Mapping** section. Email and SMS are not supported in this release.

Step 11 Complete the **Configuration** section next.

Step 12 Define the level for which this upload is applicable.

- For campaign-level upload, select the **Campaign** button.

- For list-level upload, select the **List** button.

Step 13 Define the **Time to Live** for this list. **Time to Live** is the validity period for this list of uploaded contacts to be eligible for dialing, subject to various other configurations on the LCM Console. From the calendar, select a **Start Date** and an **End Date** for **Time to Live**.

Step 14 Select an **Operation** from **Overwrite** or **Append/Update**. Operation performs the following task:

- **Overwrite**—At **Campaign** level, all existing contacts across lists are closed and uploads are treated as fresh contacts. At **List** level, all existing contacts pertaining to this list are closed and uploads are treated as fresh contacts for this list.

- **Append**—If upload level is **Campaign**, a new list is created. If upload level is **List**, contacts are appended to the existing contacts in the list. The **Duplicate Filter** check box is activated for selection. The **Duplicate Filter** looks for and uploads unique contacts, leaving out duplicates, filtered on the basis of business fields.

  Note The application first looks for duplicates in the local file or database table that is ready for upload and, from such records, keeps the first record for upload. Once done, from records already uploaded for this campaign, the application scans all open contacts using the same filters. If any open contact matches the record in the upload file, such record is NOT uploaded. The records not uploaded are shown in the error table with the remark DUPLICATE.

- **Update**—If upload level is **Campaign**, updates the business fields for the filtered contacts.

Step 15 **Filter**—Contacts from lists can be filtered on the basis of two business fields.

- **Business Field1**—The primary field based on which you want to filter for duplicates/update operation. All campaign business fields are listed for selection.

- **Business Field2**—The secondary field based on which you want to filter for duplicates/update operation. All campaign business fields are listed for selection.

  Note You may select one or both business fields. If you select both fields, contacts are filtered using the AND operator, that is, based on BOTH business fields.

Step 16   You can, at the time of upload, mark DNC and NDNC contacts by completing the **DNC/NDNC** section.

- Selecting the **NDNC Filter** check box ensures that contacts marked as National Do Not Call are not uploaded.

- Selecting the **DNC Filter** check box ensures that contacts marked as Do Not Call are not uploaded.

- **Type** is the field on which you apply the NDNC/DNC Filters, This field could be a Phone Number, or any of the business fields, and so on.

Step 17   Click the **Upload** button to complete the Contact List upload.

Manage Contacts

Manage Contacts is a powerful functionality to perform a wide range of tasks relating to contacts. Using **Manage Contacts**, you can:

- **Search Contacts**—Search contacts for a given set of conditions.

- **Reschedule/Reset Contacts**—Reschedule or reset the following contacts populated for a given set of conditions:

  - **Callback Expired Contacts** are contacts where the valid time to callback has expired.

  - **Blocked Contacts** are those that are blocked from being delivered to the Dialer.

  - **Closed Contacts** are those closed for some reason.

  - **Rescheduled Expired Contacts** are those that have been rescheduled because dialing has expired and needs to be revived.

- **Block Contacts**—Block the contacts that are populated for a given set of conditions.

- **Close Contacts**—Close contacts that are populated for a given set of conditions.

- **Move Contacts**—Move contacts from one LCM Campaign to another that are populated for a given set of conditions.

- **Reassign Contacts**—Reassign personal callback calls to other agents when assigned agents are not available.

Condition Builder

You can manage contacts better only if you get the right contacts to manage. To this end, you have to use the write your own conditions for the search criteria or build your conditions using the Advanced or the Simple Condition Builder.

The steps below help you use the condition builders and populate the contacts to manage them. These steps are referred to repeatedly throughout the Manage Contacts section.

Step 1   Turn the **Write Conditions** switch **ON** if you are writing your own filter conditions to search contacts.

Step 2   Type the filter conditions in the **Write Conditions** text box and click the **Show Contacts** button to populate the contacts based on the conditions.

Step 3   You can also use the **Condition Builder** to build conditions for filter criteria to search contacts.

Step 4   Turn the **Advanced Builder** switch **ON** if you want to build an **Advanced Condition**

An **Advanced Builder** requires meticulous condition building where using multiple open and closed brackets, conditions are placed manually. Any incorrect placement of such brackets may result in the search condition populating wrong and unintended contacts.

On the other hand, if the **Advanced Builder** switch is **OFF**, you can add conditions in groups, with pre-selected and, or conditions.

Note   Skip to Step 12 if you are using the simple condition builder.

Step 5   Enter an open bracket in the first cell.

Step 6   From the **System Fields**/**Business Fields** drop-down list, select an appropriate item.

If you select System Fields **List ID** or **Global List ID**, a pop up allows you to select the appropriate list from the available lists.

Step 7   Select a compare option, this is the condition that the field should satisfy for a contact to be selected. Some comparison parameters for your condition could be (greater than), < (lesser than), = (equals), and so on.

Step 8   Enter a value that this condition should meet for the contact to be searched.

Step 9   Close the bracket.

Step 10   Click the **Add** button to add another condition.

Step 11   After you are done with conditions, click **Save** to complete.

Step 12   If you are not using the Advanced Builder, use the **Simple Builder**.

Step 13   From the **System Fields**/**Business Fields** drop-down list, select an appropriate item.

If you select System Fields **List ID** or **Global List ID**, a pop up allows you to select the appropriate list from the available lists.

Step 14   Select a compare option, this is the condition that the field should satisfy for a contact to be selected. Some comparison parameters for your condition could be (greater than), < (lesser than), = (equals), and so on.

Step 15   Enter a value that this condition should meet for the contact to be searched.

Step 16   Click the **Add** button to add another condition.

Step 17   In the new line, select either **AND** or **OR** from the decision drop-down list.

Step 18   You can keep adding more such condition groups. Click **Save** when you are done.

Step 19   If you want to add more groups, select the **Add** button from the **Group Action** buttons.

Step 20   Repeat Steps 13 through 19.

Step 21   Proceed to the **Order By** section decide the order in which you want the contacts to be delivered to the dialer, ascending or descending.

Step 22   From the **System Fields**/**Business Fields** drop-down list, select an appropriate item.

Step 23   From the **Sort** drop-down list select, **Asc** or **Desc** for Ascending or Descending sort, respectively.

Step 24   Click the **Add** button to add more sort orders.

Step 25   Once done with sort orders, click **Save** to complete conditions.

Search Contacts

Use the **Search Contacts** functionality to search contacts for a given set of conditions.

Step 1 From the **Filter** section of the **Manage Contacts** screen, select the **Search Contacts** button.

Step 2 Complete the Condition Builder, on page 15.

Step 3 Click the **Show Contacts** button to populate the contacts based on the conditions.

Reschedule or Reset Contacts

Using the **Reschedule/Reset Contacts** option, you can reschedule or reset contacts that are populated based on the given set of conditions.

Step 1 From the **Filter** section of the **Manage Contacts** screen, select the **Reschedule/ Reset Contacts** button.

Step 2 There are two ways of selecting contacts to **Reschedule/Reset**. To directly select certain types of contacts, see Step 3. To select contacts through your own filter conditions, see Step 4.

Step 3 Select the types of contacts you want to reschedule or reset. The options are:

- **Callback Expired Contacts**, contacts where the valid time to callback has expired.

- **Blocked Contacts**, those that are blocked from being delivered to the dialer.

- **Closed Contacts**, the contacts closed for some reason.

- **Rescheduled Expired Contacts**, those that have been rescheduled because dialing has expired and needs to be revived.

Step 4 Complete the Condition Builder, on page 15.

Step 5 Click the **Show Contacts** button to populate the contacts based on the conditions.

Step 6 The contacts are populated, at the requested items per page. Select one of the following check boxes:

For each contact, or

- **Select All** to select all the contacts on the current page, or

- **Global Select** to select all populated contacts across all pages.

Step 7 Click **Action** to perform one of the actions listed below:

- Select **Revise Reschedule Time** to reschedule the contact to a later date and,or time. Specify the **Start Time** and **End Time** as the window when the contact is rescheduled. Click **Reschedule** to complete action.

- Select **Reset as Fresh Contact**, this action resets the contact as Fresh Contact. Click Reschedule to complete action.

- Select **Reopen Contacts** to reopen the contact for dialing. Click **Reschedule** to complete action.

Step 8 At any stage during this process, click **Cancel** to revert to the listed contacts.

Block Contacts

Using the **Block Contacts** option, you can block contacts that are populated based on the given set of conditions.

Step 1 From the **Filter** section of the **Manage Contacts** screen, select the **Block Contacts** button.

Step 2 There are two ways of selecting contacts to **Block**. To directly select certain types of contacts, see Step 3. To select contacts via your own filter conditions, see Step 4.

Step 3 From the **Followup Details** section, select a **From Date** and a **To Date**. Contacts falling in this follow-up date range are populated.

> **Note** The **Open Contacts** check box is in a selected condition and you cannot deselect it. This is a default condition that fetches Open Contacts for this date range.

Step 4 Complete the Condition Builder, on page 15.

Step 5 Select the **Fresh Contacts** check box to directly fetch **Fresh Contacts** without having to write conditions to fetch contacts. To populate **Delivered Contacts** that meet the filter conditions, select the **Delivered Contacts** check box too.

Step 6 Click the **Show Contacts** button to populate the contacts based on the conditions.

Step 7 The contacts are populated, at the requested items per page. Select one of the following check boxes:

For each contact, or

- **Select All** to select all the contacts on the current page, or

- **Global Select** to select all populated contacts across all pages.

Step 8 Click **Apply** to block the selected contacts.

Move Contacts

Using the **Move Contacts** option, you can move populated contacts, based on the given set of conditions, from one campaign to another.

Step 1 From the **Filter** section of the **Manage Contacts** screen, select the **Manage Contacts** button.

Step 2 There are two ways of selecting contacts to **Move**. To directly select certain types of contacts, see Step 3. To select contacts through your own filter conditions, see Step 4.

Step 3 Select **Blocked Contacts** and, or **Closed Contacts** check boxes to include these contacts to move from one campaign to another.

> **Note** The **Open Contacts** check box is in a selected condition and you cannot deselect it. This is a default condition that fetches Open Contacts for this date range.

Step 4 Complete the Condition Builder, on page 15.

Step 5 Click the **Associate Fields** button to map the modes and business fields from the source campaign to those of the target campaign.

Step 6 Select a **Mapping** from the **Mapping Name** drop-down list. All the modes and fields as mapped are retained in this operation. You can also change any specific mode or business field mapping.

Step 7 If you do not want a previous mapping to apply, select a **Target Campaign** from the drop-down list. The **Modes** and the **Business Fields** in the **Target Campaign** are populated. Select the appropriate modes and business fields from the **Source Campaign**.

Step 8 Click **Apply** to complete associating the fields.

Step 9   Click the **Show Contacts** button to populate the contacts based on the conditions.

Step 10   The contacts are populated, at the requested items per page. Select one of the following check boxes:

For each contact, or

- **Select All** to select all the contacts on the current page, or

- **Global Select** to select all populated contacts across all pages.

Step 11   Click **Apply** to move the selected contacts to the target campaign.

Re-assign Agents

Situations may arise, mainly while delivering personal callback calls that the agent assigned to the personal callback is not available to handle. In such situations, the contact needs to be rescheduled to the agent availability date and time, you can simply reassign another agent to handle the call.

Using the **Reassign Agents** option, you can now reallocate contacts from one agent to another.

Step 1   From the **Filter** section of the **Manage Contacts** screen, select the **Reassign Agents** button.

Step 2   There are two ways of selecting contacts to **Move**. To directly select certain types of contacts, see Step 3. To select contacts through your own filter conditions, see Step 4.

Step 3   Enter an **Agent ID** from whom a call is to be reassigned. To reassign fresh contacts, select the **Fresh Contacts** check box. Select a **Call Start Date** and a **Call Start Time** to narrow down the contacts to this window.

> **Note**   The **Open Contacts** check box is in a selected condition and you cannot deselect it. This is a default condition that fetches Open Contacts for this date range.

Step 4   Complete the Condition Builder, on page 15.

Step 5   Click the **Show Contacts** button to populate the contacts based on the conditions.

Step 6   The contacts are populated, at the requested items per page. Select one of the following check boxes:

For each contact, or

- **Select All** to select all the contacts on the current page, or

- **Global Select** to select all populated contacts across all pages.

Step 7   Click **Action** to see the **Reassign Agent** dialog box to reassign the selected contacts to other agents.

Step 8   Enter a new **Agent** to whom the call is to be reassigned. The call is allocated to the new agent.

Step 9   If the new agent has to handle the call at a different time, select the **Update Time** check box. Select the **Start Time** and **End Time** for the call. Click the **Reassign Agent** button to complete reassigning the call to a different agent.

Scrub

Scrub is a feature that allows you to clear contacts in the database before you effect an upload. You can clear these contacts based on some conditions which you can configure.

Step 1   There are three possible sources from where your can scrub contacts:

- **Formatted File**—The contacts are available in a formatted file with various fields separated by a common separator or a comma-separated file.

- **Database**—The contacts are available in a Database **Table** or **View** and can be uploaded directly to the campaign from the database.

Step 2   If you are scrubbing contacts from a formatted file, complete the following:

     a)   Clicking the **Choose File** button, choose a file that contains the contacts for upload.

     b)   From the **Delimiter** drop-down list, select a delimiter that separates various fields in your contact upload file.

Step 3   If you have a **Profile** for this upload, select one from the **Profile** drop-down list. Selecting a **Profile** ensures all further mapping for this contact list file is automatically accomplished as configured in the **Profile**.

> **Note**   Skip Step 3 if you are not using a Profile for mapping.

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

Step 4   Complete the Condition Builder, on page 15.

Step 5   Click **Scrub** to scrub the selected contacts.

Schedule

The Schedule tab helps you to schedule contacts. The three elements that determine the schedule that your campaign runs are:

- **CSS Schedule**—A contact selection strategy (CSS) schedule defines the CSS to be used by the application to push contacts to the Dialer. You can define these CSS schedules for blocks of time for each day of the week. For more information see, Contact Selection Strategy, on page 10.

- **Runtime Scheduling**—Use this functionality to define, for each day of the week, campaign start and end times.

- **Contact Mode Scheduling**—Use this section to configure the times, for days of the week, the Contact Strategy to be used for dialing. You can either select a contact strategy for the entire day, or a maximum of three time splits during a day.

> **Note**   Only Advance Contact Strategies are available for selection.

- **Holiday**—This section allows you to select the campaign holidays—the days that your campaign does not run.

✎

| **Note** | Holidays are added in the **System** menu. This section only allows you to select from the added Holidays. For more information, see Holidays. |

CSS Schedule

From the **Schedule** page, expand the **Contact Selection Strategy (CSS) Schedule** section to complete this configuration.

There are many ways you can add a CSS Schedule. They are:

- Use the **slider** to select the Start and End times for the campaign. The selected time appears as a band on the week-day grid.

- Either click the **Add Schedule** button or double-click on a cell in the week-day grid to select the CSS Schedule times. Follow the steps listed below:

Step 1 In the pop up, select the day for which you are adding the CSS Schedule. You can also select the **All Days** check box.

| **Note** | If you double-click a grid to configure a CSS Schedule, the day of the week is pre-selected in the pop up. |

Step 2 From the time panel, select a **Start Time** and an **End Time** for this CSS Schedule. Select a CSS from the drop-down list.

| **Note** | You can select multiple overlapping time slots, but the start time and end time should be unique. For example, you can select a time slot from 10:00 to 18:00 with CSS as CSS1. You are also allowed to select a time slot from 09:00 to 19:00 with CSS as CSS2. In this case, the application delivers contacts as per CSS2 from 09:00 to 10:00 and again from 18:00 to 19:00. In the interim, it delivers contacts as per CSS1 from 10:00 to 18:00. |

Step 3 Click **Add** to add this schedule to the campaign.

Step 4 To add more CSS Schedules, click the **Add Schedule** button or double-click on a cell in the week-day grid to select the CSS Schedule time. Follow Steps 1 to 3 above.

Step 5 Repeat the process for as many days of the week as you require to configure the schedules for.

Step 6 To delete any added scheduled time slot, click the **Delete** button.

Step 7 Navigate to the **Runtime Scheduling** section next.

Runtime Scheduling

The **Runtime Scheduling** determines the campaign run times. The campaign runs during the times configured here, overriding the start date time and end date time as configured during campaign creation.

Step 1 Click the **Add** button to add a new run time for the campaign.

Step 2 Enter a Run Date for configuring the run time.

Step 3 From the Time Panel, select a **Start Time** and an **End Time**.

Step 4 Click the **Add** button to add more run times using Step 3.

Note You can add only three run times for a day.

Step 5 When done, click the **Save** button.

Step 6 To delete any configured run time, click the **Delete** button.

Step 7 Navigate to the **Contact Mode Scheduling** section.

Contact Mode Scheduling

Contact Mode Scheduling helps configure the Contact Strategy to be used for delivering contacts to the Dialer for each week day. You can configure a maximum of three splits per day, define three different strategies for different time slots.

To configure **Contact Mode Scheduling**:

Step 1 The days are listed in the first column. Select the day to configure and turn the switch **ON**.

Step 2 From the drop-down list, select a Contact Strategy to be applied for contact delivery.

Note Only Advance Contact Strategies are available for selection.

Step 3 The selected contact strategy runs through the day. Should you require the contact strategy to run only at specific timings, turn the **Custom Time** switch **ON**.

Step 4 The **Time Range** column shows default start and end times of 12:00 AM to 11:59 PM, respectively. Use the time panel to change the start and end times.

Step 5 Click the **Add** button to add another time range.

Note You can add a maximum of three time ranges for a day.

Step 6 Click the **Save** button to save the information.

Step 7 To delete any configured run time, click the **Delete** button.

Step 8 Navigate to the **Holiday** section.

Holiday

Using the **Holidays** feature, map the campaign holidays, the days that the campaign does not operate. All the holidays created in the System configuration Holiday feature are available for selection. Map those holidays to this campaign.

Step 1 The holidays available for selection are displayed.

Step 2 Select the check boxes corresponding to the holidays you want to map for this campaign, or select the **Select All** check box to attach all the holidays to this campaign.

Step 3 Click the **Save** button to save the information.

Other Configurations

To complete creating and configuring a full campaign, a few other configurations are also required to be completed. All these configurations are grouped in this section. They are:

- Expression Builder
- Target
- Server Scripts

To open only one of the items listed above, select the **Enable to view one Panel at a time** check box.

Expression Builder

You can create a set of conditions for use in the Contact Selection Strategy (CSS). Use the **Expression Builder** to create the conditions, save them under a name, and use these as ready made sets of criteria.

Step 1 Expand the **Expression Builder** section to commence building an expression.

Step 2 Click **Create New** to create a new expression.

Step 3 Enter an **Expression Name**.

Step 4 Select a **Function** from the drop-down list.

Step 5 There are three parameters that you can choose for this expression. Click the **Settings** button against **Parameter 1**. All the Business Fields and System Fields for this campaign are populated. Select one of these and click **Select**.

Step 6 Repeat Step 5 for **Parameter 2** and **Parameter 3**, if required.

Step 7 Click **Save**. This expression is now available for selection when you create a new CSS.

Target

Set daily, weekly, and monthly targets for agents to achieve. These targets can be set for either Telephony or Business Outcomes.

Step 1 Expand the **Target** section to set a target.

Step 2 Enter a **Category Name** for the target you intend setting.

Step 3 Enter a **Description**.

Step 4 From the respective counters, select or enter figures for **Daily Target**, **Weekly Target**, and **Monthly Target**.

Step 5 Select the **Telephony Outcomes** and the **Business Outcomes** to group for this **Category**. You can select multiple outcomes. To select all outcomes, select the check box in the header rows.

Step 6 Click the **Save** button to save the information.

Server Scripts

You can use pre- and post-call scripts as part of your campaign. The scripts can be invoked to perform the following actions:

- **Pre-call Scripts**—A pre-call script ascertains from an external database whether a customer should be called or ignored, before calling a customer.

- **Post-call Script**—Use this option to embed custom scripts (also known as post- call scripts), leveraging the Managed Extensibility Framework (MEF) of the LCM platform.

Using these custom scripts we can now implement custom business logic and integrate with third-party applications by invoking APIs or performing database commands.

Step 1   Expand the **Server Scripts** section.

Step 2   Select one of **Pre-Call Script**, **Post-Call Script**, **SMS Script**, or **Email Script** buttons.

Step 3   Enter a duration (in seconds) for the script to timeout if not executing.

Step 4   Click **Import File** if importing a script file. Select the script file from the **Explorer** Window.

Step 5   Click the **Save** button to complete.

You have successfully created a campaign. The campaign is now listed in the **Campaign** page.

Campaign Actions

This section deals with the actions you can perform after creating and configuring a campaign.

Click the **Action** button to perform any of the listed actions for the selected campaign. The **Action** button expands as shown below:

This panel helps you perform any of the following actions on the campaign. From left to right, the buttons correspond to:

Step 1   Click **Edit** to edit a campaign.

Step 2   Click **Copy** to copy a campaign.

Enter a new **Campaign Name** and select a **Group** from the drop-down. Click **Save**. Your new campaign is ready for use, either as is or after changing any configuration using the **Edit** option.

Step 3   Click **Start** to start a campaign that is in a stopped state. This button toggles with the Stop button.

Step 4   Click **Stop** to stop a running campaign. This button toggles with the Start button.

Step 5   Click **Flush** to flush a campaign of contacts.

Step 6   Click **Delete** to delete a campaign. Ensure no contacts are pending delivery before deleting a campaign.