MiContact Center Ignite Preview Dialer

USER GUIDE

User Guide
Mitel Ignite Preview Dialer User Guide

October 2019

Contents

Introduction 4

Overview..4

About this manual 4

Requirements for running Ignite Preview Dialer 4

Features of Ignite Preview Dialer..4

About Ignite Preview Dialer 5

Overview..5

Accessing Ignite Preview Dialer 5

Working with Campaigns 5

Managing existing Campaigns.. 5

Managing Schedules 9

Managing Dispositions.. 10

Managing Reports... 12

Agent working with Campaigns 14

Overview..14

Accessing Campaigns 14

Viewing the configured scripts of Campaign...15

Working with Dispositions..16

Introduction

Overview

The Ignite Preview Dialer is a professional service component that must be purchased and installed by professional service providers. Ignite Preview Dialer is a web application that works in conjunction with the MiContact Center Web Ignite and Your Site Explorer to increase the outbound operating efficiency of the contact center. The Ignite Preview Dialer provides the following features:

- Outbound preview call assignment, which enables you to optimize your contact center software investments.
- Reporting based on outbound call campaigns, which provides you with valuable information concerning the success and failure of your agents and outbound campaigns.

About this manual

This document provides a brief overview of the Ignite Preview Dialer. To make full use of this guide, you must have working knowledge of the Microsoft® Windows operating environment, Microsoft Excel, and Contact Center Management Version 9.0 or later.

For additional information about MiContact Center Web Ignite and YourSite Explorer features or options referenced in this manual, see the *Mitel Contact Center Solutions User Guide*.

Requirements for running Ignite Preview Dialer

The Ignite Preview Dialer is a custom software designed to meet your specific contact center needs. The Ignite Preview Dialer requires the following software to function:

- MiCC-B Version 9.0 or later
- A Contact Center Voice Employee license for each agent that needs to use the Ignite Preview Dialer.

Features of Ignite Preview Dialer

The Ignite Preview Dialer offers the following features:

- Flexible campaign creation
- Specific reports related to your outbound campaigns
- Managing your campaigns
- Support for creating and modifying schedules for your campaigns

About Ignite Preview Dialer

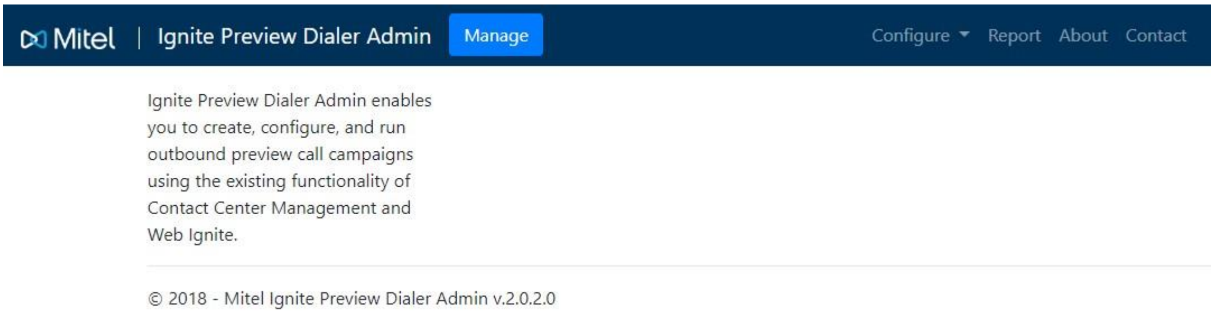
Overview

The Ignite Preview Dialer enables contact center managers to create, configure, and run outbound preview call campaigns using the existing functionality of YourSite Explorer and MiContact Center Web Ignite. The tools required to organize and manage your campaigns are available in the YourSite Explorer after the Ignite Preview Dialer is installed.

Accessing Ignite Preview Dialer

To access the Ignite Preview Dialer, open a browser and type [http://[Your MiCC Server IP address]/previewdialeradmin/](http://[Your MiCC Server IP address]/previewdialeradmin/).

The **Ignite Preview Dialer** home page is displayed.

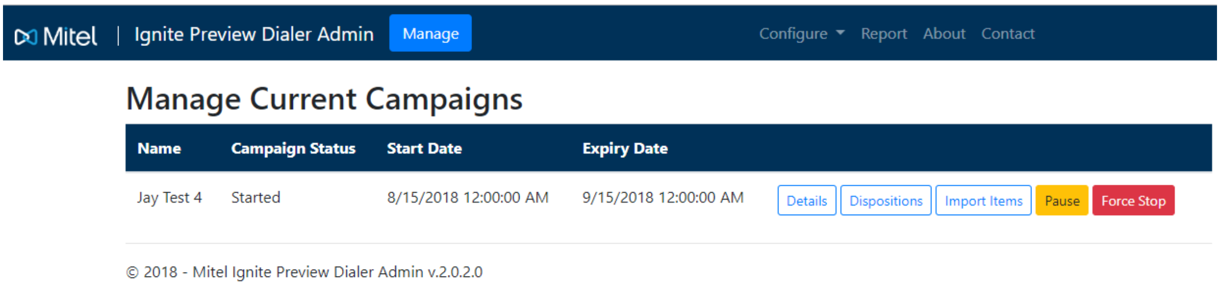


Working with Campaigns

The **Campaigns** screen allows you to manage, that is, edit and define the properties of an existing campaigns; as well as create campaigns.

Managing existing Campaigns

The **Manage Current Campaigns** screen displays all the running, paused, stopped, and pending campaigns created in Ignite Preview Dialer This screen allows you to control and edit the existing campaigns using the individual campaign control buttons.



To manage an existing Campaign:

1. Click **Manage**.
2. The **Manage Current Campaigns** screen is displayed. You can view all the existing campaigns.
3. The buttons adjacent to the existing campaigns enable you to control individual campaigns.
   - **Details** — Displays the selected campaign details in the **View Campaign Details** screen. You can also edit the details in the **View Campaign Details** screen.

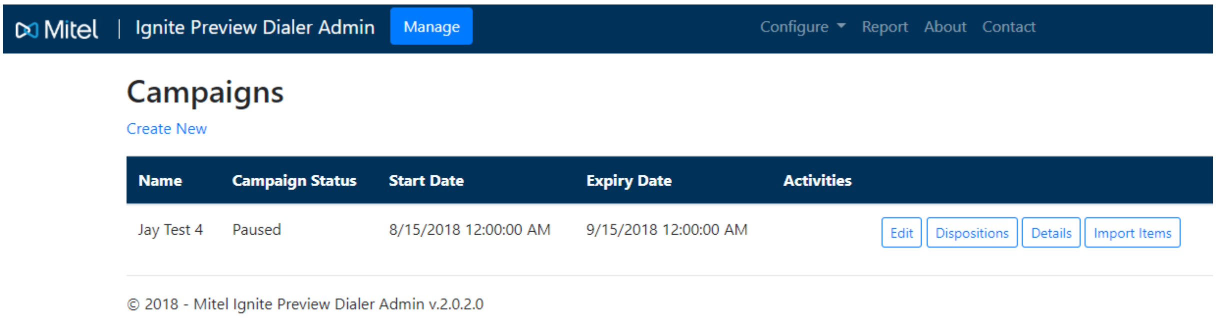
     Click **Edit** to edit the campaign details.

     Click **Back to List** to navigate to the **Campaigns** screen. You can do the following modifications to the selected Campaign:
     - Edit the campaign.
     - Add dispositions to the campaign.
     - Import items to the campaign.
   - **Dispositions** — Add disposition codes to the campaign.
   - **Pause/Play** — Pauses or plays the campaign.
   - **Force Stop** — Stops the campaign.
   - **Import** — Imports customer data file for the campaign.

Creating Campaigns:

1. In the **Configure** drop-down list, select **Campaigns**.

   The **Campaigns** screen opens.



2. Click **Create New**.

   The **Create Campaign** screen opens.
3. In the **Create Campaign** screen, specify the following details for the campaign:
   - **Name** — Assign a name for the campaign.
   - **Start Date** — Specify the date the campaign starts.
   - **Expiry Date** — Specify the date the campaign ends.
   - **Campaign Type** — Select the type of campaign:

     Progressive — Select this if you want the dialling to be automated after timeout.

     Preview — Select this if you want the dialling to be manual based on the agent acceptance.
   - **Make Busy Code** — Specify the make busy code to place the agent before broadcasting the campaign items.

- **Schedule** — Select a schedule from the drop-down list. See (add link for creating schedule), to create a new schedule.
- **Scheduled Requeue Time(sec)** — Specify the default duration a campaign item is placed back into the campaign after an agent selects a disposition code that performs a requeue on the campaign item.
- **MiCC Queue** — Specify the queue to assign the campaign to. This monitors the number of agents in the queue to facilitate blending of inbound and outbound interactions.
- **MiCC AgentGroup** — Specify the agent group to assign the campaign to. This monitor the agents who are idle and the duration they have been in the idle state. This is also used to facilitate blending of inbound and outbound interactions.
- **Number of available Agents** — Specify the number of agents in the queue before an item is presented to the agent.
- **Duration of available Agents** — Specify the duration the agent can be idle before an item is presented to the agent.
- **Timeout** — Specify the duration for which a campaign item is presented to an agent before it is automatically requeued. In progressive mode, this is the duration for which the item is presented to the agent before the system automatically forces the agent extension to dial the item.
- **CPN substitution** — Specify your outgoing caller ID.
- **Max Requeue Count** — Specify the number of times a campaign item can be requeued using the selected disposition code. Once the campaign reaches the **Max Request Count,** the campaign is marked as **Max Requeued**.

  If this field is set to 0, the campaign is requeued an infinite number of times.

4. Click **Create**.

To view the details of an existing Campaign:

1. Navigate to **Configure** > **Campaign**.
2. Select the required campaign and click **Details**.

   Alternatively, you can navigate to **Manage** > **View** to view the details of the campaign.

   The **View Campaign Details** screen opens. You can view details of the selected campaign in this screen.
3. Click **Edit** to edit the existing field details.

   Click **Back to List** to navigate to the **Campaigns** screen.

To edit an existing Campaign:

1. Navigate to **Configure** > **Campaign**.
2. Select the required campaign and click **Edit**.

   Alternatively, you can navigate to **Manage** > **View** page and click **Edit**.

   The **Edit Campaigns** screen is displayed.
3. Once the fields are updated, click **Save**.

   Click **Back to List** to navigate to the Campaigns screen.

To import customer data:

1. Navigate to **Configure** > **Campaigns**.
2. Select the desired campaign and click **Import Items**.

   Alternatively, you can navigate to **Manage** > **Import Items**.

   The **Import Campaign Items** screen is displayed.
3. Browse to select the customer data file and click **Upload**.

   Click **Back to List** to navigate to the **Campaigns** screen.

   Field mappings are displayed if a valid file is uploaded.

   For details about customer data files, see Defining and modifying customer data.

To define and modify customer data

The customer data file contains the information displayed to agents when they are prompted to make calls using Contact Center Client. This information includes: customer names, phone numbers, scripts, and so on. The customer data files are saved in either .csv or .xlsx format.

You can upload the customer data files to the campaigns that you select. The Ignite Preview Dialer uses pre-defined fields that are associated to the first row in the customer data file, which is defined as headers of the column. The Ignite Preview Dialer supports the following column headers:

- **AccountNumber** (Optional)
- **AccountName** (Optional)
- **ContactName** (Mandatory)
- **PlaceHolder1** (Optional)
- **PlaceHolder2** (Optional)
- **PlaceHolder3** (Optional)
- **PlaceHolder4** (Optional)
- **PlaceHolder5** (Optional)
- **Script1** (Optional)
- **Script2** (Optional)
- **Script3** (Optional)
- **Phone1** (Mandatory)
- **Phone1Desc** (Mandatory)
- **Phone2** (Optional)
- **Phone2Desc** (Optional unless you have a Phone 2 Field)
- **Phone3** (Optional)
- **Phone3Desc** (Optional unless you have a Phone 3 Field)
- **Phone4** (Optional)
- **Phone4Desc** (Optional unless you have a Phone 4 Field)
- **Phone5** (Optional)
- **Phone5Desc** (Optional unless you have a Phone 5 Field)

- **Phone6** (Optional)
- **Phone6Desc** (Optional unless you have a Phone 6 Field)

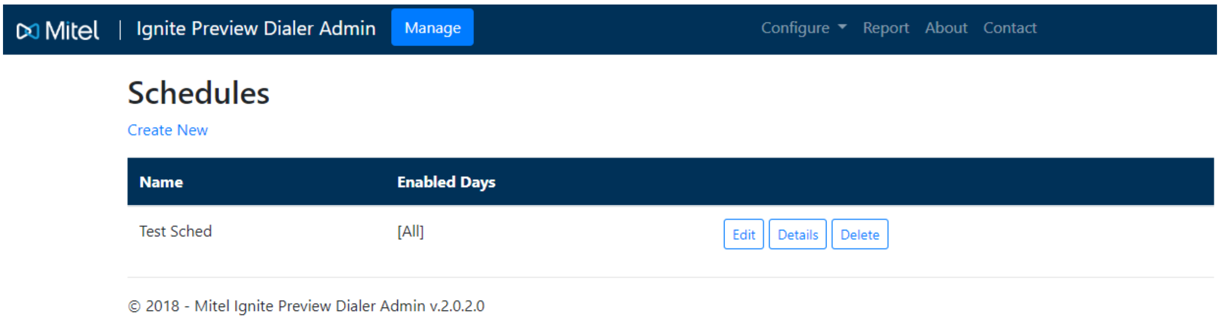
Managing Schedules

The **Schedules** screen enables you to create a new schedule, view and edit schedules, and delete an existing schedule.

To create a new Schedule:

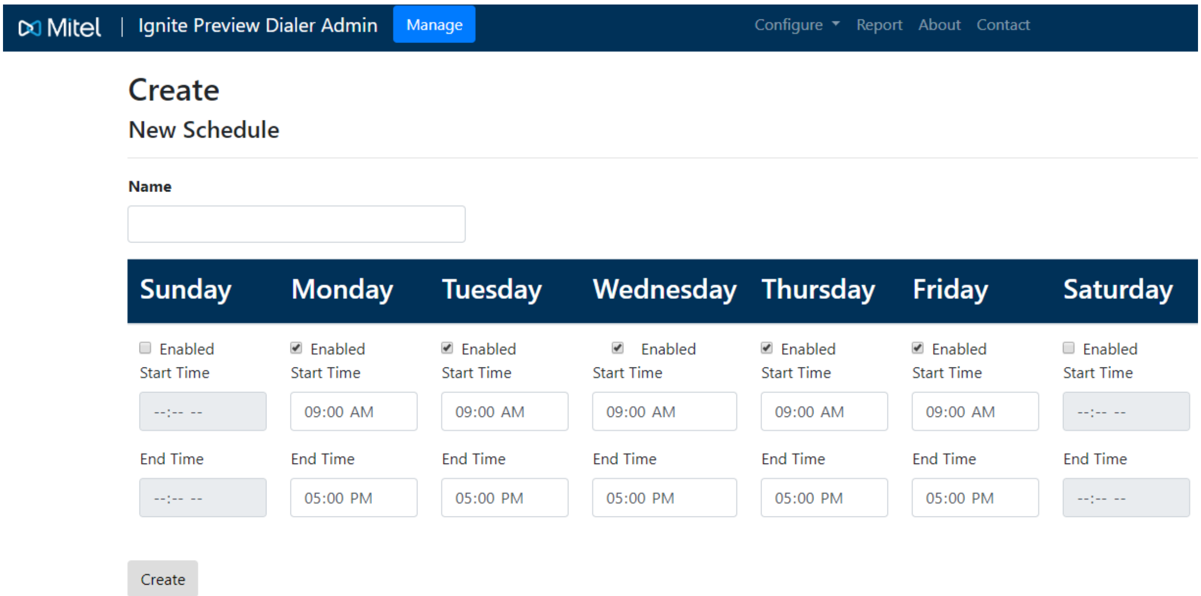
1. In the **Configure** drop-down list, select **Schedules**.

   The **Schedules** screen opens.



2. Click **Create New**.

   The **Create New Schedule** screen is displayed.



Enter the following details to create a new schedule:

Name — Assign the name for the schedule.

Start Time — Enter the Start Time for the campaign to start the campaign.

End Time — Enter the End Time for schedule to stop the campaign.

Enabled — Specify whether the day is enabled or disabled for the campaign.

3. Click **Create**.

   The new schedule is created.

To view the details of an existing Schedule:

1. Navigate to **Configure** > **Schedules**.
2. Select the required Schedule and click **Details**.

   The **View Schedule Details** screen displays the fields of the selected schedule.
3. Click **Edit** to edit the existing field details.

   Click **Back to List** to navigate to the **Schedules** screen.

To edit an existing Schedule:

1. Navigate to **Configure** > **Schedules**.
2. Select the required Schedule and click **Edit**.
3. Once the fields are updated, click **Save**.

   Click **Back to List** to navigate to the **Schedules** screen.

To delete an existing Schedule:

1. Navigate to **Configure** > **Schedules**.
2. Select the required Schedule and click **Delete**.

   The selected schedule is deleted.
3. Click **Back to List** to navigate to the **Schedules** screen.

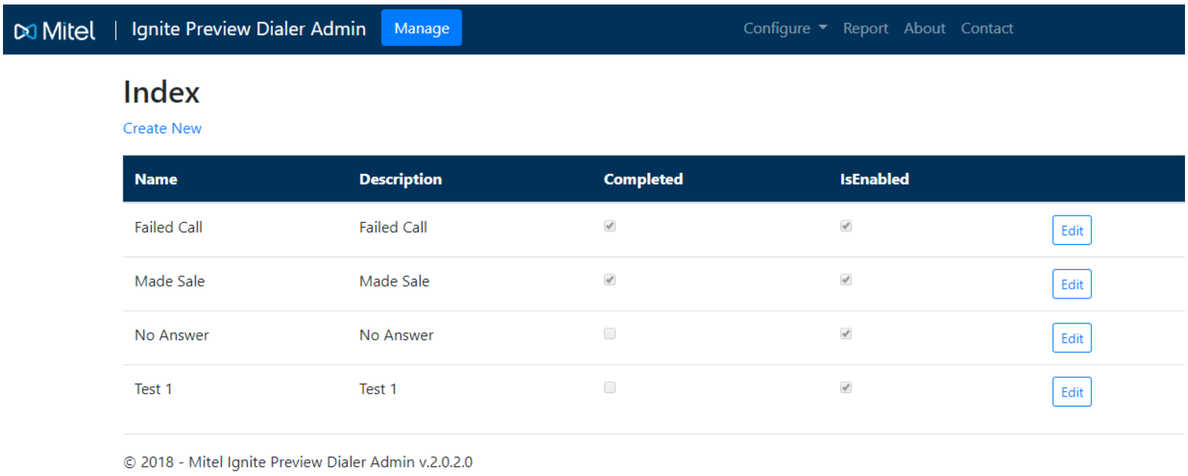
Managing Dispositions

The disposition screen allows you to create a new disposition and edit existing dispositions.

To create a new Disposition:

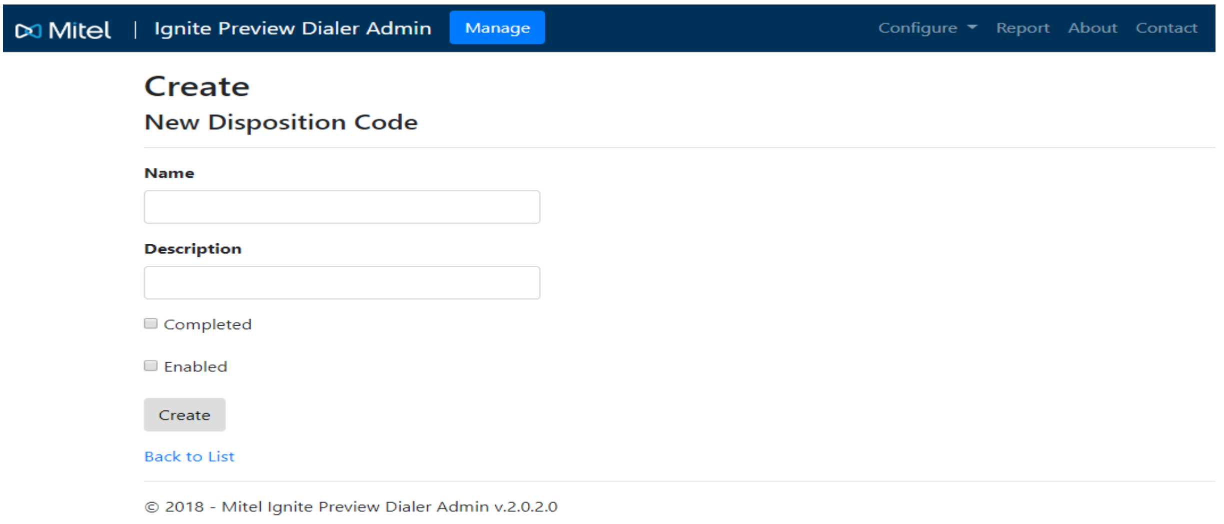
1. In the **Configure** drop-down list, select **Dispositions**.

   The **Index** screen is displayed.



2. Click **Create New**.

   The **Create New Disposition** screen opens.



   Enter the following details to create a new schedule:

   Name — Assign the name for the schedule.

   Description —Enter a description for the disposition.

   Completed/Enabled — Select **Completed** or **Enabled**.

   - Select **Enabled** when creating a new disposition. If **Enabled** is selected, the Campaign is either available in the disposition list or indicates that the Campaign is not for agents.
   - Select **Complete** to mark the completion of the Campaign item. If unchecked, the Campaign item is available for requeue.

> **Note:** Enabled and Completed are optional fields.

3. Click **Create**.

   The new disposition is created.

To view the details of an existing Dispositions:

1. Navigate to **Configure** > **Dispositions**.
2. Select the required disposition and click **Details**.

   The **Details Disposition** screen displays the fields of the selected disposition.
3. Click **Edit** to edit the existing disposition.

   Click **Back to List** to navigate to the **Index** screen.

To edit an existing Disposition:

1. Navigate to **Configure** > **Dispositions**.
2. Select the required disposition and click **Edit**.
3. Once the fields are updated, click **Save**.

   Click **Back to List** to navigate to the **Index** screen.

To add Dispositions codes to Campaign:

1. Navigate to **Configure** > **Campaigns**.
2. Click the **Dispositions** button beside the campaign for which you want to add the disposition code.

   The **Manage Campaign Disposition Codes** page is displayed.
3. Select the disposition code from the **Disposition Codes** list.
4. Click **Add**.

> **Note:** If the disposition is configured as requeue, you can specify the duration for the campaign item to be requeued. The value 00:00:00 will automatically use the default scheduled requeue time for the campaign.

To delete Dispositions codes from Campaign:

1. Navigate to **Configure** > **Campaigns**.
2. Click the **Dispositions** button beside the campaign for which you want to delete the disposition code.

   The **Manage Campaign Disposition Codes** page is displayed.
3. From the **Assigned Disposition** list, select the check box beside the disposition code you want to delete.
4. Click **Update**.

Managing Reports

The Reports screen allows you to generate reports for Campaigns.

To generate reports of Campaigns:

1. Click **Reports**.

   The **Reporting** screen opens with the list of existing **Campaigns**.
2. Select the **Start Created Date** and the **End Created Date** for which you want to generate the report and click **Filter**.

   The list of campaigns available during this duration is displayed in the **Select Campaign** box.
3. Select the campaign from the list and click **Generate Activity Report.**

   This generates a Microsoft Excel spreadsheet containing information related to the activities of a campaign and the agent actions within it.

   The following defines the column headings for the Campaign Activity report:

Heading	Definition
Campaign Name	Name of the Campaign
Created Date	Date the Campaign was created
Start Date	Date the campaign is set to start.

Heading	Definition
Expiry Date	Date the Campaign is set to end
Completed Date	Date the Campaign ended
Status	Status of the Campaign
Distributed Activities	Number of outbound calls that were distributed to agents
Completed Activities	Number of outbound calls that agents marked as completed using Disposition
Failed Activities	Number of outbound activities that agents marked as failed using Disposition
Requeued Activities	Number of activities that were requeued by the application
Scheduled Requeue Activities	Number of outbound calls sent back to the queue by agents
Rejected Requeue Activities	Number of outbound activity requests that were rejected by agents
Remaining Activities	Number of outbound activities remaining in a Campaign to be distributed to agents

Agent working with Campaigns

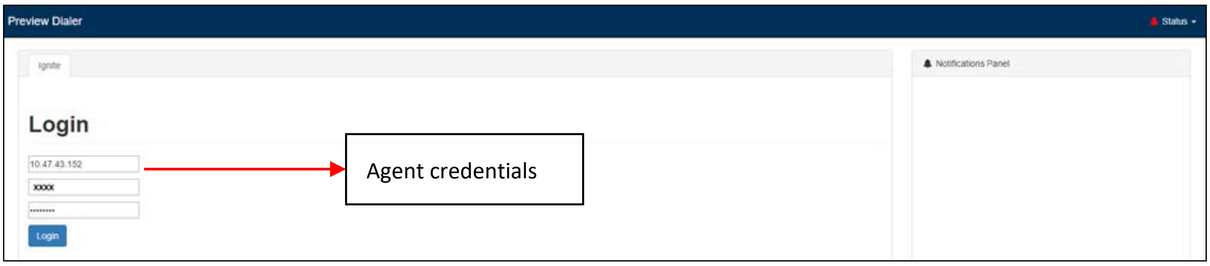
Overview

This section explains how the agents can access and use the Ignite Preview Dialer.

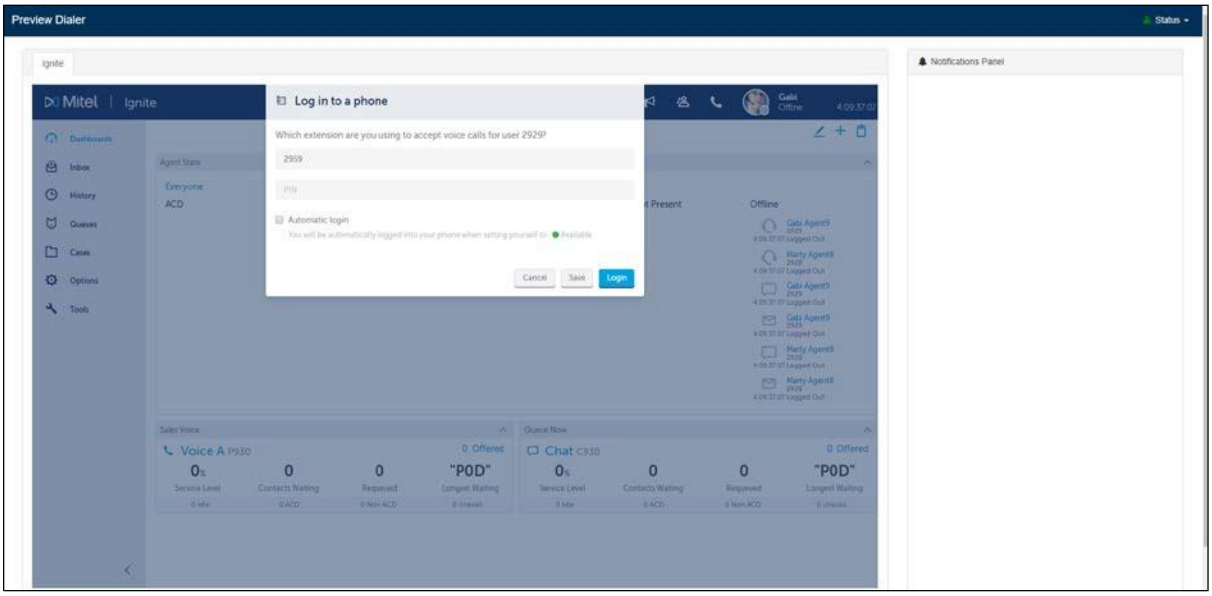
Accessing Campaigns

Complete the following steps to access the campaigns in the Ignite Preview Dialer:

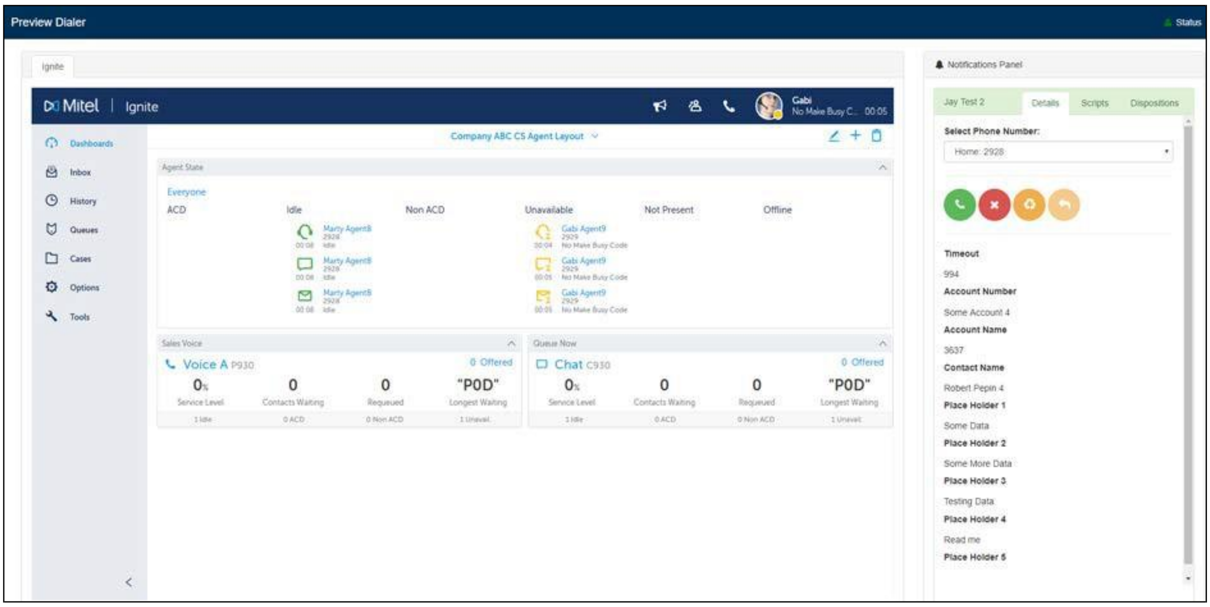
1. In a browser, type http://[Your MiCC Server IP address]/ previewdialeradmin.4
2. On the login page, enter the MiCC Server IP address and the agent credentials. Click **Login**.



3. Log in to the phone by entering the agent extension and password.



The MiContact Center Web Ignite agent interface loads on the left side and the Notification Panel, which is the agent Ignite Preview Dialer panel, loads on the right side.



Following are the agent Ignite Preview Dialer buttons:

- is used to accept a call.
- is used to reject a call.
- is used to requeue a call.
- is used to try calling again. This button is enabled only after a call is placed.

Viewing the configured scripts of Campaign

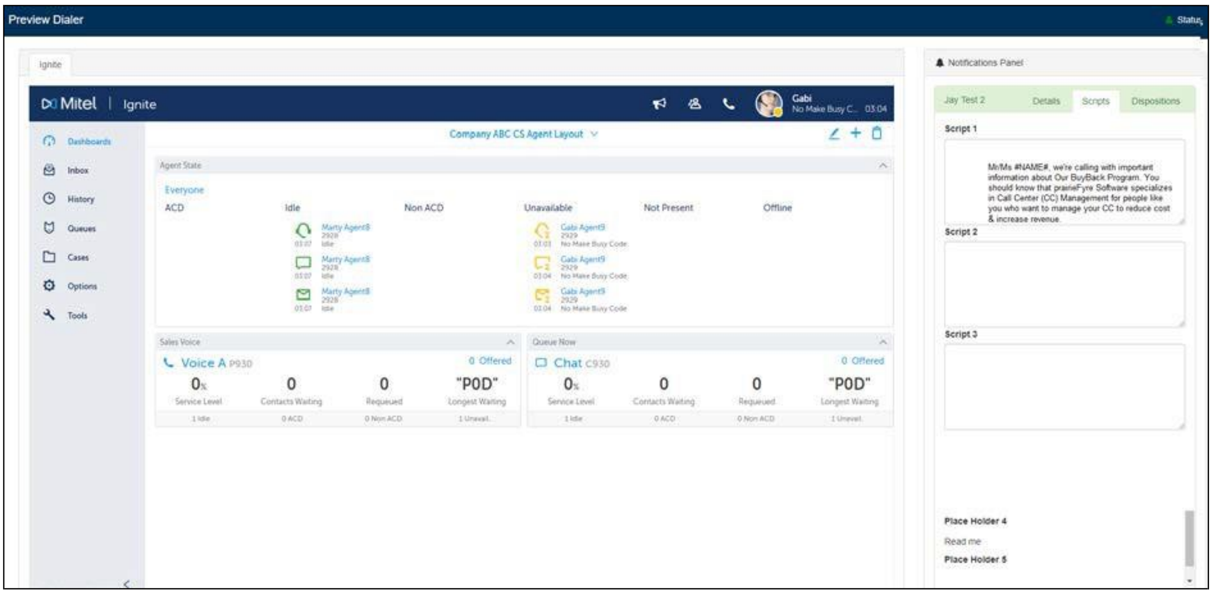
The Notification Panel displays the agent information when the threshold specified in the campaign is reached for the agent.

To view the scripts for the campaigns:

1. Log in to the **Ignite Preview Dialer**.

   See Accessing campaigns.

2. If the agent details are displayed in the Notification Panel, click the **Scripts** tab to view the configured scripts for campaigns.



Working with Dispositions

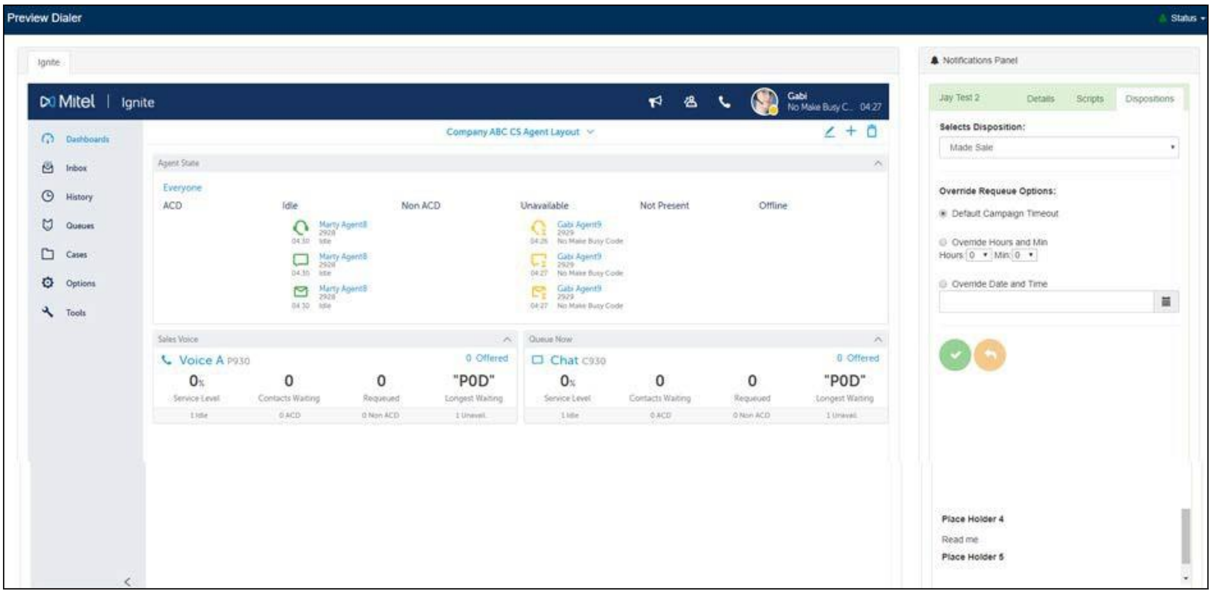
The **Dispositions** tab is displayed automatically after a call completes successfully. If the call fails or is not answered, the agent needs to open the **Dispositions** code tab manually.

To open the **Disposition** tab:

1. Log in to the **Ignite Preview Dialer**.

   See Accessing campaigns.

2. Click the **Dispositions** code tab on the Navigation Panel.



3. The agent can select the Disposition from the **Select Disposition** drop-down list to indicate whether the campaign is completed or requeued.

4. The agent can set the **Override Requeue Options** either by clicking the **Default Campaign Timeout** radio button or change the time by selecting the **Override Hours and Min** or entering the **Override Date and Time**.

5. Click to submit the selected details.

6. Click to navigate to the **Campaigns** list.