

# Mitel Phone Manager Outbound Technical Manual

APRIL 2019

DOCUMENT RELEASE 5.2

TECHNICAL MANUAL



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Release 5.2 - April, 2019

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# 1 Product Overview

Phone Manager Outbound is a progressive dialling solution designed to improve the productivity of outbound telesales staff when using the MiVoice Office 250 phone system.

Phone Manager Outbound is a purely software based dialler that uses the rich OAI interface of the telephone system to make and manage calls on behalf of users. Phone Manager Outbound improves outbound performance by:

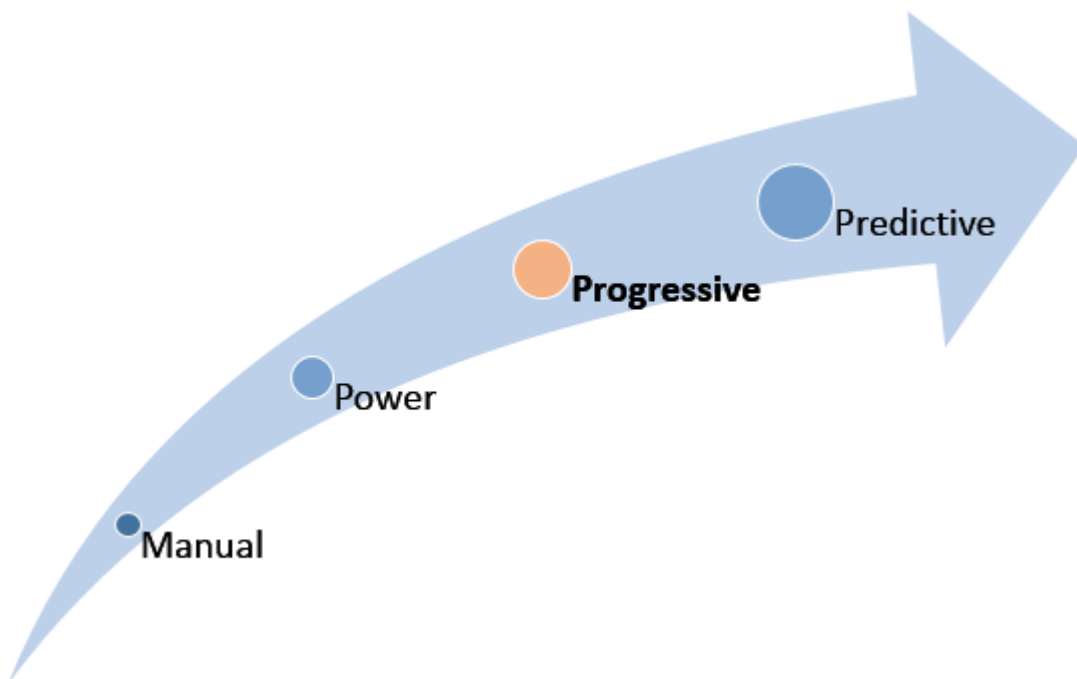
- Reducing manual call setup time
- Managing Contact & Call-back Strategy
- Managing user's wrap-up time between calls
- Providing supervisors with views & reports on users activity
- Automatically handling out of service numbers

⚠ This feature depends on the trunk lines in use and the signalling being provided.

The Phone Manager Outbound solution is part of the Mitel Communication Service and works in conjunction with Mitel Phone Manager to provide a dedicated outbound dialler interface for the end user.

## 1.1 Dialling Methods

Progressive dialling is a method of automating outbound dialling that speeds up call setup and processing while continuing to use the user's existing MiVoice Office 250 extension for telephony operations to keep implementation costs down. Unlike Predictive dialling where more outbound calls are made than there are users available, Progressive dialling makes calls on a one to one basis directly from the user's extension.



The following section describes each method of outbound dialling available and compares the benefits and drawbacks of each.

### 1.1.1 Manual Dialling

This is how most businesses will start making outbound calls. This is ideal for when making ad-hoc calls in an office environment but is inefficient when a user's primary role is to make outbound calls to clients or potential clients. Calls

are made using the key pad of the extension and the user is in complete control of the call from beginning to end.

### Benefits

- Users have complete control of which numbers they dial.

### Drawbacks

- Users have complete control of which numbers they dial.
- The dialling process is slow and miss-dials can occur.
- Hard to implement dialling policies.
- Users choose if and when they make another call.
- No centralised method of controlling data.

## 1.1.2 Power Dialling

This method of dialling is one step up from manual dialling and is a feature provided by the Mitel Phone Manager desktop client. Calls are made from a computer using a mouse click or keyboard shortcut. This reduces the call setup time and should eradicate miss-dials by the end user.

### Benefits

- Fast call setup.
- No miss-dials.
- More talk time than manual dialling.

### Drawbacks

- Users have complete control of which numbers they dial.
- Hard to implement dialling policies.
- Users choose if and when they make another call.
- Centralised methods of controlling data either don't exist or must be written in-house by the customer .

## 1.1.3 Progressive Dialling

This method of dialling is an extension of power dialling that provides a centralised way of managing the contact strategy for data and managing dialling policies. There are many management and efficiency increases in using progressive dialling over power dialling

### Benefits

- Fast call setup.
- Centrally managed data.
- Centrally managed contact strategy & dialling policies.
- Central visibility of users.
- More talk time than power dialling.
- Inbound call blending can be achieved using the existing investment in MiVoice Office 250 hardware and features.
- Works with the features of your MiVoice Office 250, not as a separate piece of hardware.
- Dialler calls can be reported on via existing reporting packages so there can be a single point of reporting for both inbound & outbound calls which maximises previous investment in MiContact Center Office.

## Drawbacks

- Calls are made from the user's own extension so there is less of a productivity increase than predictive dialling.

## 1.1.4 Predictive Dialling

Predictive is the most efficient way of dialling there is, but that comes with a cost to your staff and your customers. Predictive diallers use additional hardware connect to the telephone system which is used to make calls on behalf of users in a one to many relationship.

## Benefits

- Maximum talk time when compared to other dialling methods.

## Drawbacks

- Customers can be presented with silent calls and / or automated messages when users aren't available to handle calls.
- Higher turnover of staff due to the more stressful nature of being presented with calls.
- Only beneficial when there are larger numbers of users working a single campaign data set.

## 1.2 Web Based Management

Phone Manager Outbound provides a web based user interface that gives supervisors access to all the configuration, status information, data management and reporting tools. Access to the system can be granted to any MCS user through the use of Security Profiles. Phone Manager Outbound supports the same Windows Authenticated login supported by MCS so users can swap between both sites with ease, not having to remember any login details.

## 1.3 Phone Manager User Interface

Mitel Phone Manager provides the end user interface for people making the telephone calls. Phone Manager features a full screen Phone Manager Outbound user interface which provides users with all the information they need about who they are dialling and their own current status on the system.

## Phone Manager Features

- Phone Manager dynamically loads all Disposition Codes (call outcome codes) based on the campaign the user is dialling from.
- Call history details about the record being dialled.
- Access to notes made by previous callers.
- User status control including DND and pause features.
- Call control options for holding and transferring.
- Status indication including call timers and wrap up count downs.



This document covers some of the Phone Manager features relating to disposition codes and call data. More information on how the user interface works can be found in the Phone Manager Technical Manual.

## 2 Installation, Licensing and Setup

Phone Manager Outbound is an embedded feature of the Mitel Communication Service, it is installed by default when the MCS is installed and is licensed through the MCS.

Phone Manager Outbound has enhanced requirements in comparison to MCS, requirements of both MCS and Phone Manager Outbound must be taken into account when sourcing a server to install it on.

Phone Manager Outbound can be virtualised in the same ways as outlined for MCS. For information on this and how to install MCS please refer to the MCS Technical Manual.

### 2.1 Requirements

The following sections outline the server, database and phone system requirements for Phone Manager Outbound. In addition, the Phone Manager Client requirements must be met for each end user of the system.

 Phone Manager Outbound has increased server and client requirements over and above that of a normal MCS installation. If Phone Manager Outbound is being added to an existing MCS installation then install may need to be moved to a higher specification machine.

#### 2.1.1 Server Requirements

Phone Manager Outbound is an embedded feature of the Mitel Communication Service. Whichever server is running the MCS installation must meet the requirements of the Phone Manager Outbound solution.

##### Operating System Requirements

- Windows 7, 8.1, 10 (Professional, Enterprise) 32/64-bit.
- Windows Server 2008 R2, 2012 R2, 2016 (Standard / Enterprise / Datacentre) 64-bit.
- VMWare & Hyper-V Environments Supported.

##### Hardware Requirements

To use Phone Manager Outbound, the server running MCS must meet or exceed the equivalent of the Large System size as outlined in the MCS technical manual:

- CPU: 2 x Intel quad core Xeon @ 3.1 GHz
- RAM: 16GB
- HDD: 100GB + 1GB for each million calls records
- SQL Server: Full
- NIC: 1Gb

 Please refer to the Best Security Practices section of the MiVoice Office Application Suite Technical Manual for a guide on securing the server.

#### 2.1.2 SQL Server Requirements

Phone Manager Outbound makes heavy usage of the SQL Server engine installed on the MCS server. By default, an instance of SQL Express is installed with MCS to store configuration and call history information. This same instance of SQL Server is used by Phone Manager Outbound to store and manage campaign data. Depending on the number of users Phone Manager Outbound will be hosting and the rate of dialling, it may be necessary to upgrade the version of SQL Server installed on the MCS machine so that it can make more use of the available RAM.

If another SQL Server instance is available on site then Phone Manager Outbound can be configured to use an existing instance on another server which removes the need to upgrade the SQL Server instance on the MCS server.

A SQL Server upgrade is required when more than 2,000 call attempts are being made in an hourly period. An SQL Server upgrade may also be required if historical call data needs to be reported on beyond the default storage time, please read the [Data Archiving](#) section for more information.

## 2.1.3 MiVoice Office 250 Requirements

Phone Manager Outbound uses an extensive range of features on the MiVoice Office 250 platform and can also put a heavy load on the system's processor when a large number of users are dialling.

The following are a list of features that must be present on the phone system to use Phone Manager Outbound:

### Features / Licenses / Software

- System OAI Call Control & 3rd Party Events enabled
- Mitel CT Gateway required for Multi-Node implementations
- Mitel CT Gateway required when more than 3 heavy OAI application are installed on the system (e.g. Operator Console, MCS, MiCC Office)
- MiVoice Office 250 V6 or higher
- Trunk lines with answer supervision

### Extension Requirements

- Supported IP handsets: 5312, 5324, 5320, 5330, 5340, 5360, 5304, 6920, 6930, 6940
- Supported digital handsets: 8528, 8568
- Supported Softphones: Phone Manager Desktop (Professional or Team Leader licence required)
- It is compulsory that a compatible headset is also used

### Hardware Requirements

- PS-1 is required as per the MiVoice Office 250 engineering guidelines

 In addition to the requirements above, any other operations the telephone system is performing need to be taken into account when specifying the size of phone system required. For example, if the phone system was handling 2,000 inbound calls at the same time as Phone Manager Outbound is making outbound calls then this needs to be taken into account when designing the system.

## 2.2 Licensing Phone Manager Outbound

Phone Manager Outbound is licensed by user through the Mitel Communication Service license. Supervisor access to the system management website is not restricted in any way.

Once a Mitel Communication Service has been updated to have Phone Manager Outbound Licenses they can be assigned to users using a Phone Manager Client Profile.

Phone Manager Outbound Licenses are used on a concurrent basis so they can be assigned to more users on the system than there are licenses available. A user having a client profile will be deemed as consuming a Phone Manager Outbound license when they are logged into Phone Manager Outbound using the Phone Manager.

## 2.3 Enabling Phone Manager Outbound

Once Phone Manager Outbound has been licensed it needs to be enabled on the MCS website. To enable Phone Manager Outbound, login to the MCS website with an Administrative account and navigate to the Configuration section. The Phone Manager Outbound details form can be found under the Features section of the site.

**Phone Manager Outbound**

Phone Manager Outbound is a progressive outbound dialling solution that...  
To enable, select the Hunt Group on the phone system that the system...

Enable ☒

ACD agent Hunt Group

[Launch Phone Manager Outbound website](#)

**Database**

Use default connection details ☒

[Save](#) [Test](#)

The **Enable** option needs to be checked to enable the Phone Manager Outbound feature. Once enabled the MCS Watchdog will automatically start the necessary services required to run the solution:

**Mitel MCS CTI Host Service:** Hosts all Phone Manager connections, manages the Phone Manager Outbound data queues and the Phone Manager Outbound dialling process (this service will already be running if Phone Manager is in use).

**Mitel MCS Phone Manager Outbound Processor:** This process performs all data processing tasks (Imports, Exports, and Reports) and manages data archiving.

By default Phone Manager Outbound will use the same SQL Server instance that MCS is using to host the two database it requires. If necessary, Phone Manager Outbound can be configured to use an alternate database (on another server if required).

To have Phone Manager Outbound use an alternate SQL Server instance, uncheck the **Use default connection details** option and enter the SQL Server connection details in the boxes provided. The *Test* button can be used to confirm whether the connections settings have been entered correctly or not.

The ACD agent Hunt Group property only needs to be set when using the [Sync ACD Agent Status](#) feature of the solution.

## 2.4 Settings up User Accounts and Website Access

Phone Manager Outbound has two types of user interface available, one aimed at supervisors who are managing campaign data / users and one aimed at the users themselves to give them information about the calls they are on.

Access permissions for both user interfaces is assigned through the Mitel Communication Service website, through the use of Security & Client Profiles.

### 2.4.1 Supervisor Access

The supervisor user interface is a standalone website designed to provide users with access to the following:

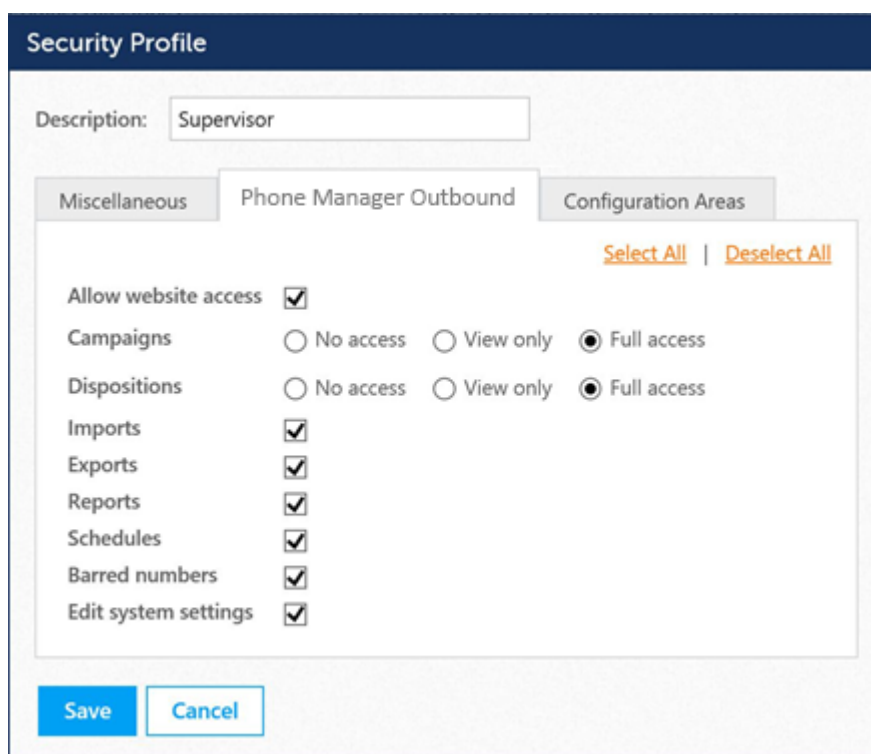
- Data management tools to import & export campaign data.
- Campaign & User views to track daily progress.
- Reporting tools for tracking historical progress.
- Configuration tools to tailor dispositions & contact strategy

Access to the Phone Manager Outbound website can be assigned through MCS Security profiles.

### 2.4.1.1 Website Access Levels

To give a user access to the Phone Manager Outbound website, the Security Profile for the User's Role needs to be modified and be assigned the required level of access.

 For more information on editing Security Profiles, please reference the MCS Technical Manual.



The screenshot shows the 'Security Profile' configuration window for a user role named 'Supervisor'. The 'Phone Manager Outbound' tab is selected. Under this tab, there are checkboxes for 'Allow website access' (checked), 'Imports' (checked), 'Exports' (checked), 'Reports' (checked), 'Schedules' (checked), 'Barred numbers' (checked), and 'Edit system settings' (checked). For 'Campaigns' and 'Dispositions', there are radio button options for 'No access', 'View only', and 'Full access', with 'Full access' selected for both. At the top right of the configuration area, there are links for 'Select All' and 'Deselect All'. At the bottom, there are 'Save' and 'Cancel' buttons.

Overall access to the Phone Manager Outbound website is assigned using the **Allow website access** option. Once this has been selected, varying levels of access can be assigned to the user depending on what they are required to do.

### 2.4.1.2 Access Configuration Breakdown

The following table outlines the differing levels of website access that can be assigned to a user.

| Section   | Configuration | Description                                                                                                                      |
|-----------|---------------|----------------------------------------------------------------------------------------------------------------------------------|
| Campaigns | No Access     | The user will have no access to the 'Campaigns' section of the website.                                                          |
|           | View Only     | The user will be able to see the status of campaigns and users but will not be able to edit any of the campaign's configuration. |

|                      |             |                                                                                                                                                  |
|----------------------|-------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
|                      | Full Access | The user will have full access to the 'Campaigns' section of the website                                                                         |
| Dispositions         | No Access   | The user will have no access to the 'Dispositions' section of the website.                                                                       |
|                      | View Only   | The user will be able to see the details of dispositions that have been configured but will not be able to edit any disposition's configuration. |
|                      | Full Access | The user will have full access to the 'Dispositions' section of the website                                                                      |
| Imports              | Enabled     | When enabled the user can create and run imports, otherwise they have no access to the imports section of the website.                           |
| Exports              | Enabled     | When enabled the user can create and run exports, otherwise they have no access to the exports section of the website.                           |
| Reports              | Enabled     | When enabled the user can create and run reports, otherwise they have no access to the reports section of the website.                           |
| Schedules            | Enabled     | When enabled the user can create and run schedules, otherwise they have no access to the schedules section of the website.                       |
| Barred numbers       | Enabled     | When enabled the user can create and manage barred number tables, otherwise they have no access to the barred numbers section of the website.    |
| Edit system settings | Enabled     | When enabled the user can view and changed settings on the 'Configuration' section of the website.                                               |

### 2.4.1.3 Accessing the Phone Manager Outbound Website

The Phone Manager Outbound website is hosted as a sub site of the MCS website. The website can be accessed using one of three methods:

1. Enter the URL directly (add '\CampaignManager' to the base address of the MCS website).
2. Use the link from the Phone Manager Outbound section of the MCS website.

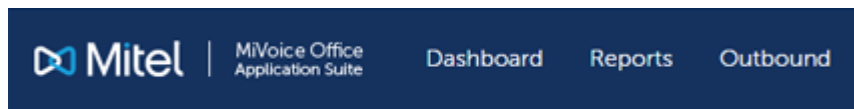
## Phone Manager Outbound

Phone Manager Outbound is a progressive outbound dialling solution. To enable, select the Hunt Group on the phone system that the system

|                      |                                     |
|----------------------|-------------------------------------|
| Enable               | <input checked="" type="checkbox"/> |
| ACD agent Hunt Group | <input type="text" value="2001"/>   |

[Launch Phone Manager Outbound website](#)

3. Use the drop-down option on the main MCS header.



### 2.4.1.4 Windows Integrated Login

The Phone Manager Outbound website does not share authentication with the MCS website, if users are swapping between the two websites they need to authenticate separately with each one. To make things as easy as possible for users it is best to enable Windows Integrated login for the MCS website (the Phone Manager Outbound website will inherit this configuration). Once enabled users will be automatically logged in to a site and they do not have to remember login details.

For information on how to enable Windows Integrated Login, reference the Mitel Communication Service Technical Manual.

### 2.4.1.5 Website Settings Changes

Any of the settings on the Phone Manager Outbound website can be change at run time without the need to restart the system. Users can also be added to or removed from the system at run time. It is important to note however that settings make take up to 2 minutes to be applied to the run time environment. This is a result of the way the system has been deliberately designs and ensures that excessive load is not placed on the database checking for settings. Instead settings are cached and are updated at regular intervals.

 This also applies to moving users between campaigns on the website.

## 2.4.2 End User Access

The end user access to Phone Manager Outbound is provided through Phone Manager. Phone Manager has a dedicated user interface that provides each user with control over their status and information about the calls they are on.

 For more information on the Phone Manager user interface please reference the Phone Manager Technical Manual.

For a user to have rights to login and use Phone Manager Outbound they need to be assigned a Phone Manager

Outbound User License via Client Profiles. Client Profiles are used by the Mitel Communication Service to control which license a Phone Manager user has access to along with some other general settings.

Phone Manager users can be given access to Phone Manager Outbound in one of two ways:

1. **User controlled:** Phone Manager users have a Phone Manager Outbound option added to their toolbar. They can choose when they load the Phone Manager Outbound user interface and login as an outbound user. This mode of operation is for users that only need to work outbound campaigns on an ad-hoc basis.
2. **Open on startup:** The Phone Manager Outbound user interface will open as soon as Phone Manager connects to the MCS. In this mode the user always has the Phone Manager Outbound user interface open and Phone Manager will shut down as soon as the Phone Manager Outbound user interface is closed. This mode of operation is ideal for users whose only role is making outbound campaign calls.

In addition to how the Phone Manager Outbound user interface loads, the ability for users to edit campaign records and their blending configuration are also controlled by the Client Profile.

## 2.5 Database Overview

Phone Manager Outbound makes extensive use of SQL Server during its day to day operation. All the campaign data, call history and configuration information is stored in two Phone Manager Outbound specific SQL databases that by default run in the instance of SQL Server that the MCS solution is using.

Phone Manager Outbound uses the following two databases:

1. **CampaignManager:** Stores all configuration information, campaign data, current day's call history & current day's user history.
2. **CampaignManager\_Archive:** Stores long term call history and user history.

The databases are created and managed by Phone Manager Outbound and are automatically re-indexed overnight.

Depending on the size of the system being installed there may be a requirement to locate the Phone Manager Outbound databases on a separate server to the one housing the MCS solution. In these scenarios Phone Manager Outbound can be configured to look in an alternate location for its databases.

### 2.5.1 Database Updates

Upon initial installation and after any upgrades the Phone Manager Outbound databases need to have their structure updated in the same way the MCS databases do.

The process of updating the database structure for MCS and Phone Manager Outbound databases is handled by the Mitel MCS Watchdog.

### 2.5.2 Database Backups

When the Phone Manager Outbound databases are kept in the default location as part of the MCS SQL Server instance, they will be backed up on a nightly basis as part of the normal routine.

At the configured time the databases will be backed up, call data will be archived from CampaignManager to CampaignManager\_Archive and then both databases are re-indexed to ensure they are running optimally for the next day.

The database backup routine for the Phone Manager Outbound databases is the same as that for the MCS databases. For more information on configuring where database backups are stored and when they occur please reference the MCS Technical Manual.



For information on how to restore previously backed up versions of the databases, please reference the Troubleshooting section.

## 2.5.3 Data Archiving

Phone Manager Outbound stores vast amounts of call and user status history in the CampaignManager\_Archive database. To ensure this database does not reach the limits of the SQL Express database size (currently 10GB), Phone Manager Outbound has to archive data off.

Phone Manager Outbound will automatically archive off surplus call & user data into a flat file once the database approaches the maximum size or the data is over 1 year old, whichever ever happens first. Any data that has been archived off into a flat file can no longer be reported on using the Phone Manager Outbound Reporting interface. But can be accessed with a text editor or Microsoft Excel if for any reason call history items need to be verified.

If the SQL Server database has been upgraded to a non-Express version then data archiving can be optionally disabled if the customer wishes to be able to run reports over a more extended time period.

## 2.6 GDPR

The General Data Protection Regulation (GDPR) is an EU legal framework that set guidelines for the collection and processing of personal information of individuals within the European Union (EU). GDPR sets out the principles for data management and the rights of individuals, it covers all companies that deal with data of EU citizens, even if the company is based outside of the EU.

### What rights and controls do EU citizens have?

GDPR provides individuals with increased rights and control over how their data is used. GDPR includes the following rights for individuals:

- The right to be informed
- The right of access
- The right to rectification
- The right to be forgotten
- The right to restrict processing
- The right to data portability
- The right to object
- The right not to be subject to automated decision-making, including profiling

In addition, businesses wishing to record personal data will need to ensure that at least one of the following six conditions be met to legally record the data:

- Individuals involved in the call have given consent to be recorded
- Recording is necessary for the fulfilment of a contract
- Recording is necessary for fulfilling a legal requirement
- Recording is necessary to protect the interests of one or more participants
- Recording is in the public interest, or necessary for the exercise of official authority
- Recording is in the legitimate interests of the recorder, unless those interests are overridden by the interests of the participants in the call

### How does this affect businesses?

Any business that processes personal data will need to ensure they have policies and processes in place to meet the rights of the individual's data they hold. In addition, they need to ensure they have a legal right to store the data, they are not storing data on minors, and that they have processes in place to report data breaches.

### How does GDPR affect Mitel Phone Manager Outbound?

Phone Manager Outbound stores campaign data in it's database to be used when making outbound calls. This

information is accessible to users through the administration web interface or through Mitel Phone Manager when users are making specific calls.

Any business that stores personal data will need to ensure that they have a legal right or requirement to do so. Where data storage is not explicitly required by regulations (such as MIFID II), consent will usually be required.

Any personal data stored in the system will need to be documented as part of the business' GDPR policies, with specific references on how data can be identified and modified/removed if required.

How consent for data storage is sought, recorded and managed is of vital importance. The ICO has published a detailed guidance on consent under GDPR:

<https://ico.org.uk/media/about-the-ico/consultations/2013551/draft-gdpr-consent-guidance-for-consultation-201703.pdf>

If existing forms of consent held by businesses do not meet the new requirements, they must be refreshed so that they meet the new GDPR requirements.

### Employee User Data

The system will store limited personal data for users/employees. The system does store audit information about what users of have done; when they logged in, settings changed, contacts dialled etc.



Please refer to the MiVoice Office Application Suite Technical Manual for more information on what employee data is stored.

### Customer Data

It is possible for the system to store the personal data of a company's customers in the following locations:

- Campaign Tables within the SQL database
- Call History Tables with the SQL database

It is important to understand what information is being imported into and stored by the system to ensure that any customer requests can be responded to.



It is the responsibility of the customer using Mitel Phone Manager Outbound to ensure that the data imported into campaigns meets the following requirements:

- You have permission to store the data
- The data is not classed as sensitive
- The data does not relate to Minors

## How to use the Mitel Phone Manager Outbound to help meet GDPR requirements?

The following sections outline how GDPR affects the system and to provide guidance on what needs to be done to help companies comply with GDPR requirements.

### Document what is stored and ensure it contains no sensitive data

The previous section listed what types of personal data may be stored in the system. It is important to add to your existing GDPR documentation the data that is being stored in Phone Manager Outbound. The type of data stored in campaigns along with why it is being used must be documented.



The campaign data fields are not designed to store sensitive personal information. Ensure that any data imported into a campaign or added as a note is not classed as sensitive and does not relate to a Minor.

## Consent

It is important to ensure that you have consent to record customer information and that they have opted in.



It is the responsibility of the company using Phone Manager Outbound to ensure they have consent to use and store and data they have imported into a campaign.

## Secure/Audit Access to the System

It is important to ensure that only the relevant users have access to the system and that they only have the minimum permissions that they require. In addition, ensure that the server the solution is installed on is appropriately secured and that no unauthorised users can gain direct access.

For more information on securing the server, please refer to the Best Security Practice in the MiVoice Office Application Suite Technical Manual.

## Train Staff on Locating Data

Customer records can be quickly and easily identified using the [Record Search](#) features of the solution. Ensure staff are trained on how to use it to find customer data within the system.

## Tools Available to Remove Data

Using the [Record Search](#) feature, customer records can be deleted from the system. In addition, the [Barring Tables](#) feature can be used to stop new campaign data being imported with numbers of people who have requested they not be called.

## End-User Training

Ensure that all users of the system are trained on data protection and on how to handle customer request to remove data from the system. Disposition codes can be used to flag records as completed so that it doesn't get called again.

## Update Internal Documents on where data is stored

When installing the system, ensure that your GDPR policy documentation is updated to make reference to any personal data that is being stored within the MiVoice Office Application Suite/Mitel Phone Manager Outbound.

## 3 Campaigns, Data and Contact Strategy

The following section is designed to outline how Phone Manager Outbound works and how data to be dialled is imported, dialled and exported. When installing a centrally managed dialler, the data management and contact strategy are the most important things to get right.

### 3.1 Campaigns and Data Management

Campaigns are the key element to how the system works and how a supervisor can tailor the system to get the required results. Each campaign created on the system is made up of a set of configurable settings that define how the records are to be dialled and a table where all the data to be dialled is stored.

### 3.2 Campaign Data

Managing the data flow through the system is a key way of getting the most of every record imported into the system. Contact records that are imported into a campaign usually fit into one of three categories:

1. **New Data:** Records for cold calling where there is no existing relationship.  
e.g. Data purchased from a third party to convert into a sale or customer.
2. **CRM Export:** Contact records from existing customers to be dialled.  
e.g. Existing customers to notify of contact expiry or appointment.
3. **Real-Time Leads:** Data from a customer or potential customer requesting an immediate call.  
e.g. Someone browsing a website that would like an instant call-back.

Depending on the type of data being dialled, the contact strategy will need to be tailored and the life and integrity of the data needs to be considered.

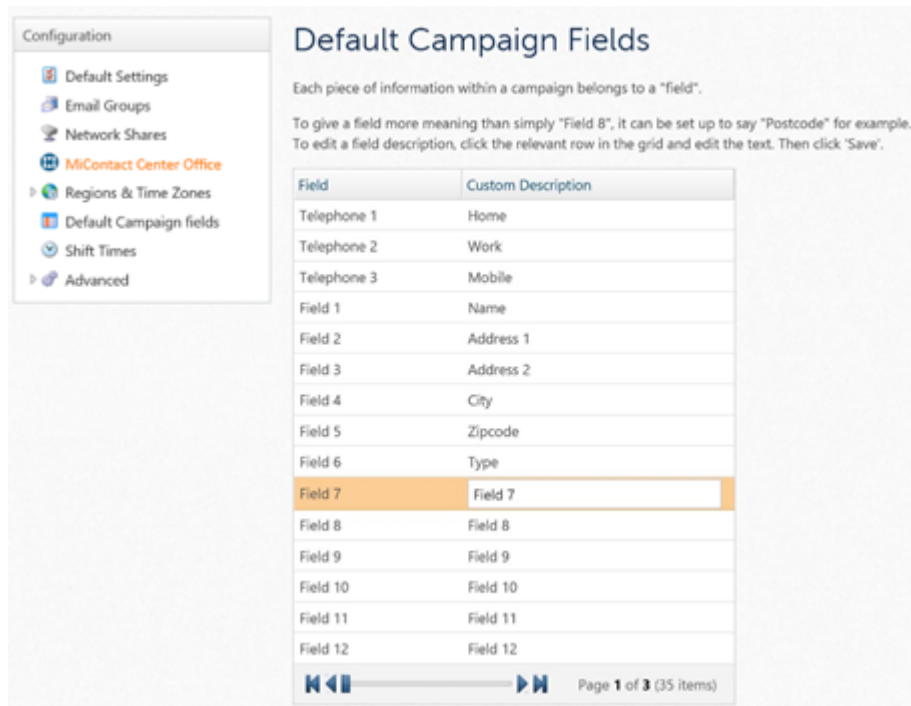
Phone Manager Outbound can store up to three telephone numbers per contact record and 30 fields of supplementary data (only the first 10 fields are visible to the Phone Manager user) to provide the end user with information about the contact they are dialling.

Telephone numbers to be dialled must be imported as a complete number including the area code for the number. At least one of the three telephone number fields must be populated otherwise the import of the contact record will be rejected.

Data fields can be up to 255 characters in length and can be populated with any information that would help the end user when on the phone to the contact. As a minimum the contact's name should be imported into one of the fields (usually field 1) and then the other fields can be populated as required.

#### 3.2.1 Field Naming

To make it easier for supervisors to keep track of which data is being stored, the 30 data fields can be named to show their usage (for example, name, address etc.). These names are then used when importing data so supervisors know exactly which fields to map from their import files.



The screen shot above shows the three telephone fields being renamed along with the first six data fields. This can be done in the Configuration section of the Phone Manager Outbound website.

Once changed, these new names will be referenced on the end users Phone Manager and on any imports that are configured.

## 3.2.2 Campaign Limits

Each campaign is limited to a maximum of 250,000 contact records. This makes sure that the data is stored efficiently and ensures that Phone Manager Outbound can perform data manipulation in a timely manner.

In addition to the record limit, there is a limit of 50 campaigns that can be created at any one time. If this limit is reached, no new campaigns can be created until an existing one has been deleted.

## 3.3 Importing Data

Data can be imported into a campaign through either of two methods:

| Method                 | Description                                                                                                                       |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| Flat File Imports      | Lists of contact data from a CSV or TXT file is imported by the dialler processor service (most common method of importing data). |
| Direct Database Insert | Individual contact records are inserted individually into a specific campaign using a web service call.                           |

Whichever method is used to import the data, a series of checks are made against each record to ensure that the system has all the information to correctly dial the record and that there are no matches against barred numbers and that the numbers are valid.

 Any data imported into the system must comply with data protection and privacy regulations. Please refer to the GDPR section for more information.

When uploading import files via the website there is a file size limit of 25MB. Files can be zipped to reduce size or use the Network Share import method instead.

### 3.3.1 Flat File Imports

To import data into a campaign from a flat file an Import Definition needs to be created. The Import Definition is used to tell the system about the data that is being imported. Once an Import Definition has been created it can be reused to import additional data from the same source to speed up the import process.

To create an Import definition, navigate to the Data Management section of the website and select Imports from the menu on the left hand side. If any import definitions have already been created they will listed on the screen. Press the *Create Import* button to add a new Import Definition.

Fill out the settings required for the import using the following sections as a reference. Once all the settings have been completed the Import Definition can be saved and then run manually or added to a Scheduled Task.

Import Definitions are used to import both Campaign and Barred Number data.

### 3.3.2 Import Source

Phone Manager Outbound can import campaign data files in two ways, either by importing a file at that the user selects at runtime or by looking at a network share and importing any files it contains.

To import data from a local file on the computer then select "my computer" from the **Import Source** radio selection. With this Import Source selected, the user will be prompted for the files location each time the import is run. If a user has multiple files to import they will need to re-run the import for each file in turn.

For more information on importing from a network share please refer to the [Network Shares](#) section.

### 3.3.3 Data Format

Phone Manager Outbound needs to know how the source file will be formatted in order to correctly read the data.

**Imports**

General | Import data source | **Data format** | Data assignment

File contains column headers ☐ yes ☒ no

Import duplicate phone numbers ☐ yes ☒ no

Field delimiter  
e.g. "Joe Bloggs", "Manchester" has a double quote (") as the delimiter  
☒ " (double quotes) ☐ ' (single quotes) ☐ (nothing)

Field separator  
e.g. "Joe Bloggs", "Manchester" has a comma (,) as the separator  
☒ , (comma) ☐ ; (semi-colon) ☐ (tab)

\* indicates a required field

Save Cancel

**File contains column headers:** If the source file contains a header row at the beginning of the file then setting this option to 'yes' will ensure this row does not get imported into the campaign.

**Import duplicate phone numbers:** By default, Phone Manager Outbound will check if a telephone number already exists in the campaign table and will not import another record with the same telephone number. For testing purposes it is sometimes necessary to override this behaviour by changing this option to 'yes'

**Field delimiter:** The delimiter outlines any special characters that may be surrounding a field

**Field separator:** Used to indicate how each field in a row will be separated, for a CSV file this will be a comma.

### 3.3.4 Data Assignment and Field Mapping

When importing data the order of the fields in the source file will probably not match the defined fields inside Phone Manager Outbound.

By default, Phone Manager Outbound expects the import source files' fields to be in the following order:

```
Telephone1, Telephone2, Telephone3, Field1, ..., Field30, CallingPartyNumber,
CallingPartyName, Callback, CallbackPriority, CallbackAgentID
```

The following table outlines what each field is used for and which of the fields are required.

| Field Name           | Required                                                                    | Description                                                                                                                                                                                |
|----------------------|-----------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Telephone 1, 2, 3    | At least one of these fields must be populated                              | The telephone fields will be checked against the Valid number pattern defined against the campaign and will also be checked against any Barred Number Group assigned to the campaign       |
| Fields 1 to 30       | No, however in practice it would not be useful to have them all unpopulated | Stores information regarding the contact record that is being imported. The ordering of these fields is important to get right so that the data is presented to the user in a standard way |
| Calling Party Number | No                                                                          | This field can be used to override the Calling Party Number when dialling this particular contact. If not provided, the Calling Party Number at campaign or company level will apply       |
| Calling Party Name   | No                                                                          | This field can be used to override the Calling Party Name as per the description for Calling Party Number above. This may or may not be supported by your line provider                    |
| Callback             | No                                                                          | If the record should be called at a specific time it can be passed here in the format 'YYYY-MM-DDTHH:MM:SS'                                                                                |
| Callback Priority    | No                                                                          | If the Callback field is populated the priority field can be used to indicate a number between 1 and 99                                                                                    |
| Callback Agent ID    | No                                                                          | If the Callback field is populated the agent ID field can be used to specify which user should get the call                                                                                |

Each Import Definition provides the user with an option to map the source fields to the target fields of the campaign if they are not in the required order.

To amend the order from the default, uncheck the **Use default mapping** check box and then use the drop-down boxes provided to select the field number from the source file. Any fields that are not being important can be left blank ("..." selection).

The field mapping will be saved with the Import Definition so that any imports to occur from the same data source should not need to be mapped again. If data from more than one source is to be imported into a single campaign then multiple Import Definitions can be created for each source file type.

### 3.3.5 Importing from a Network Share

When importing data using a Scheduled Task it is necessary to import data from a fixed location. Phone Manager Outbound uses network shares for this process.

Before configuring an Import definition to use a network share, the network share must have already been configured. For more information, refer to the Network Shares section of this document.

When selecting a Network Share as the source for an import, the share to be used needs to be chosen. Once selected an option to enter a sub-path is provided. If the file(s) to be imported are located in the root of the share then the sub-path can be left blank. If the file(s) are in a sub folder on the share then enter the details of the sub folder here, for example:

```
\\Server\Sharename\SubFolder1\SubFolder2
```

Enter "SubFolder1\SubFolder2" in the sub-path section.

Once the definition for a network share import has been created it can be run manually or added to a Scheduled Task to be run automatically. When the import is run it will check the specified folder for any files that have a valid import file type. Any files found will be imported and then deleted from the network share so that they are not imported again on a future schedule of the import.

### 3.3.6 Direct Database Insert

In some scenarios where data control is key to a client or when contact records are time sensitive, it may be necessary to import data into a campaign in a more automated way. This method of importing is most commonly used when potential customers browsing a website request a call-back. When this happens a contact record can be inserted directly into a waiting campaign to ensure that the client is called as soon as possible.

### 3.3.7 Import History

The import history screen displays every import that has been attempted or taken place on the system over the last two weeks. This is useful for when Scheduled Tasks are being used to automate import process overnight. The history screen will outline each individual file that has been imported, how many records were successful and how many records failed.

The history screen updates ten seconds to keep the data accurate if an import is in progress.

Import History Record States:

- Grey (Pending), indicates that an import has been requested but that the Phone Manager Outbound Processor has yet to start it.
- Yellow (Processing), indicates the Phone Manager Outbound Processor is currently importing a file.
- Green (Completed), indicates that an import has completed.
- Red (Cancelled), indicates that a user manually cancelled the import while it was in progress.



When uploading import files via the website there is a file size limit of 25MB. Files can be zipped to reduce size or use the Network Share import method instead.

## 3.4 Exporting Data

At some point the data inside the campaigns will need to be exported. This could be for one of a number of reasons:

- Completed data needs importing into a CRM package.
- Completed data needs removing to keep the campaign table below the maximum record count.
- A campaign needs deleting and all records must first be removed.

To export data from a campaign an Export Definition needs to be created. The definition outlines what type of data should be exported and from which campaign. If all data is being exported then the options to delete the campaign is also made available.

### 3.4.1 Exporting Removes Data

When data is exported from a campaign it is actually removed from the campaign. This is in contrast to other export routines you may use in SQL or in a CRM for example where an export creates a copy of the data, leaving the original data intact. In Phone Manager Outbound exporting will remove the data from the campaign table so it is important to make sure the correct parameters are configured on the Export Definition. If the contact data is removed, call history data will remain in the history tables until it is archived off.

### 3.4.2 Deleting Campaigns

If a campaign needs to be deleted, either because it was setup incorrectly or because it has been run to completion, an export must first be run. All data must be exported from a campaign before it can be deleted. This is to ensure that no data can be lost by just deleting a campaign while it is populated.

### 3.4.3 Export Details creation and settings

Exports are configured and run in the same way as imports. An export definition must be created in the 'Data Management' section of the website to outline which data to export and what to do with the data.

#### Export Settings

Each export definition needs to be given a description that uniquely identifies the type of export. A single export definition can export data from a specific campaign. To run the export on different campaigns the export definition can be edited to change the campaign then run multiple times.

The export mode outlines which contact data from the campaign needs to be exported:

- Only completed records,      contacts with a completed status will be exported
- Only callbacks,                contacts with a recycle or callback state will be exported
- All records,                      all contacts will be exported
- Uncalled records,              all records that have yet to be dialled will be exported



If all records are being exported then the campaign can be deleted by checking the 'Delete campaign after export' box. This is the only way to delete campaigns from the system.

It is advised to compress the exported file into a zip file to cut down on the file size. This is important when emailing the exported file due to file size restrictions on most email services.

The export can then be targeted at email groups and/or network shares.



Once data has been exported there will be no way for the user to get to the data again. Ensure the user is aware they need to keep a copy of the exported files.

#### Exported Data Format

Data is exported from the system in a CSV file format with a contact record on each line. The data exported contains the following fields:

| Column No | Name               | Description                                                         |
|-----------|--------------------|---------------------------------------------------------------------|
| 1         | Campaign Name      | The name of the campaign the contact record was exported from       |
| 2         | Telephone 1        | The contents of the first telephone field                           |
| 3         | Telephone 2        | The contents of the second telephone field                          |
| 4         | Telephone 3        | The contents of the third telephone field                           |
| 5 to 14   | Field1 to Field10  | The contents of the first 10 data fields                            |
| 15        | Field Sup          | Reserved for future use.                                            |
| 16        | Times Called       | The number of times the contact record was called                   |
| 17        | Result             | The result code (disposition code) for the last call to the contact |
| 18        | Agent ID           | The agent ID of the last user to call the contact record            |
| 19        | Call End           | Time the last call to the contact ended                             |
| 20        | Status             | The last status the contact record held within the campaign         |
| 21        | Outgoing CLI       | The calling party number that was configured against the contact    |
| 22 to 41  | Field11 to Field30 | The contents of the data fields 11 to 30                            |

## 3.5 Barred Numbers

There are many reasons why certain specific numbers should not be imported into a campaign, the most common reasons are:

- **Existing customers:** The need to ensure existing customers are not called when dialling bought in cold call data.
- **National 'Don't Call' Lists:** In many countries there are lists of numbers that companies cold calling must clean their data against to ensure they are compliant with regulations.
- **Internal 'Don't Call' Lists:** Clients who have previously complained about calls or old existing customers who have had bad experiences.

Any specific number that needs to be removed from campaigns is classed as a "Barred Number". Phone Manager Outbound implements a barred number table and group structure to provide the most flexible and easy to manage way of cleaning out barred numbers from campaigns.

### 3.5.1 Barred Number Tables and Groups

Each type of barred number data should be put into a separate barring table so that it can be easily managed and updated in the future without effecting different types of data.

For example, if there are two different types of barring data to use then two barring tables would be created.

Once the barring tables have been created they now need to be grouped together in a barring group so that they can be assigned to a campaign.

Now that the tables have been grouped together any of the campaigns can be linked to the group. At this point the campaign will be cleaned against the barring tables and any matching records found will be removed from the

campaign. Any new data imported into the campaign will be checked against the barring tables first.

 If multiple countries are being dialled from Phone Manager Outbound different Barred Number Tables and Groups must be set up for each country. In addition, Barred Number Tables for different countries cannot be grouped together.

## 3.5.2 Importing Barred Number Data

Data can be imported into a barred number table in the same way data is imported into a campaign using a [flat file](#).

To import data into a barred number table create a new Import Definition and select "Barred number" from the **Import Type** option. Once selected, the following options should appear on the screen:

### Barred Number Table

Select the target table for the import to insert data into. Each table can only contain data for a single region.

### Clear table before import

Depending on the type of data being imported you may wish to append data to the table or clear the existing data from the barring table and just have the new data imported. When checked, this option will delete all existing data from the barring table before the import begins.

When data is imported it will be checked to ensure it matches the telephone number format for the country of the Barred Number Table. Any number not matching the format will be skipped during the import. Before the telephone number is checked any non-numeric characters will be removed.

The data being imported should be a single column containing the phone number to be barred. The phone number must include the area code of the number.

### Example data

| Number         | Action                                                                 |
|----------------|------------------------------------------------------------------------|
| 0161 1234567   | Valid data, the space will be removed during import                    |
| (020)12345678  | Valid data, the brackets will be removed during import                 |
| 01344-123456   | Valid data, the hyphen will get removed during import                  |
| 1131234567     | Valid data, the toll digit '0' will be added during import             |
| 14101619876543 | Invalid data, longer than the national number length                   |
| +441619876543  | Valid data, the international country code will be replaced with a "0" |

## 3.5.3 Default Barring Table

To speed up the process of setting up a new campaign, one of the barred number groups can be designated as the default group. From this point on, any new campaign created will automatically be linked to the default barred number group without any user intervention.

If the default barring table has changed, campaigns that were mapped to the original default group will remain that way. If they need to be re-linked to the new default barring group then this must be done manually through the [campaign details](#) screen.

## 3.6 Maintenance Mode

When a campaign is being cleaned against a barring table it will be placed in Maintenance Mode. No further calls will be made from the campaign until Phone Manager Outbound has finished cleaning the campaign. Maintenance Mode will be enabled on a campaign when one of the following happens:

- A new Barred Number Group is assigned to a campaign.
- A new Barred Number Table is added to the Barred number Group assigned to a campaign.
- New data is added to any Barred Number Table that belongs to the Barred Number Group assigned to the campaign.

Maintenance Mode will automatically be removed when the cleaning has been completed. This should take no more than a minute or so, in most cases it will be a lot less.

## 4 Contact Strategy and Disposition Codes

The contact strategy for a campaign defines how the system will dial & recycle contacts, what priority it gives and basically control how effective a campaign is. There are many settings that go together to make up the contact strategy for the system. Most of the settings are controlled through Disposition Codes, these are the codes that are used to categorise each call attempt to a contact and then define whether and how the contact should be called again.

### 4.1 Contact Record Lifecycle and States

Each record imported into a campaign will start its life classed as a 'New' contact. This is the initial status given to the contact record by the system (unless the record has been imported as a call-back). Each time the record is dialled by the system it will be dispositioned with one of the configured Disposition Codes. This disposition may be applied automatically by the system or manually by an end user through the Phone Manager interface.

The Disposition Code applied will define what happens to the contact record next. The following table outlines the different states a contact record can have.

| State                     | Called Again? | Description                                                                                                                                           |
|---------------------------|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| New Record                | Yes           | This is the initial state of contact records imported into the system                                                                                 |
| Recycle                   | Yes           | The record will be recycled by the system to be dialled again based on shift times or based on a defined time delay                                   |
| Call-back                 | Yes           | The contact has requested a call-back at a specific time                                                                                              |
| Completed                 | No            | The call has reached a completed result. This may be a success or failure result, see Completed Calls for more information                            |
| Paused                    | No*           | Records can be paused through the website UI. While in this state the record will not be called                                                       |
| Deleted                   | No            | Records can be deleted through the website UI. Once deleted the record remains in the database but in a state that cannot be dialled                  |
| Barred number             | No            | If a barred number update gets a match on an existing contact record it will be moved to this state and not dialled again                             |
| Max Call Attempts Reached | No            | If the number of times called for a contact record reaches the Max call attempts programmed on the system / campaign it will be changed to this state |
| Moved                     | No            | If a contact record is moved to a new campaign, a copy of the record will remain in the original campaign but in the Moved state                      |

\* Unless the record is resumed through the website UI

As contact records are dialled and dispositioned they will move from being a "New Record" to "Completed" either directly or through a series of Call-back / Recycle stages.

#### 4.1.1 Max Call Attempts

Each time a contact record gets dialled the system will increment a counter of each call attempt. If a contact record is repeatedly dispositioned for recycling or call-backs the number of call attempts will eventually reach the defined 'Max Call Attempts' limit. When this happens, if the disposition for the last call is set for recycle or call-back, this will not be actioned by the system. Instead, the contact record will be changed to the 'Max Call Attempts Reached' state and will

not be dialled again.

The "Max Call Attempts" limit is defined at system level but can be overridden at campaign level if required.

## 4.2 Disposition Codes

Disposition Codes are used to reflect the result of each call attempt and define what should happen to the contact record next. Each Disposition Code outlines various settings which capture whether the correct person was spoken to on the call, whether the call resulted in a positive outcome and whether the record should be dialled again.

Disposition Codes are created at a system level and are then applied to each campaign they are relevant to (by default, System Codes are applied to all campaigns). Only Dispositions codes that have been assigned to a campaign a contact record belongs to can be used by the end users making the calls.

If required, some of the configuration options for Disposition Codes can be overridden at [campaign level](#). For example, wrap up times can be increased for Disposition codes on test campaigns for new starters to get them used to the system.

### 4.2.1 Call State and Contact Types

The call state is used to define whether the call was answered or not. If a Disposition Code defines the call attempt as being answered then one of the following Contact Types needs to be chosen:

#### Automated Answer

This contact type is used for defining calls as being answered by a voicemail, fax machine or equivalent automated service (not a live person).

#### Wrong Party Contact

This contact type is used to specify that a live person answered the call but it was not the person that the system was attempting to reach.

#### Right Party Contact

This contact type is used to specify that the person the system was attempting to reach answered the phone.

Contact Types are used for calculating contact rates and conversion rate statistics so it is important to get the Disposition codes configured correctly.

### 4.2.2 Contact Strategy

The Contact Strategy configuration against a Disposition Code defines if and how the contact record should be dialled again. If the correct person was not spoken to on the call or they need to be called again for some reason then the contact record needs to be recycled or called back.

#### 4.2.2.1 Recycled Calls

Defining a call for recycling means the contact record needs to be dialled again but not at a specific time. When configuring a Disposition code to recycle a call, one of the following delays can be chosen:

| Delay Mode | Description                                                                                                                                                    | Usage                                                                                              |
|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| Time       | Time based delays (Minutes, Hours, Days, Weeks, Months) will recycle the call based on the time delay specified added to the time the record was last dialled. | Useful recycling calls on a short time scale e.g. Contact needs to be made today, recycle the call |

|       |                                                                                                                                                                                                                                                                                              |                                                                                                                                                           |
|-------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
|       | So if a record was dialled at 3pm on Thursday and a 24 hour time delay is applied, the record will next be queued for dialling at 3pm Friday.                                                                                                                                                | quickly on an hourly basis to maximise the chance of reaching the person quickly                                                                          |
| Shift | Shift based delays allow the system to recycle the call between the configured campaign shifts. The number of shifts to delay the recycling can be configured when this delay type is chosen. The system will then pick a random time within the specified shift to the contact record back. | Reduces burn rate on data by spreading contact attempts across a range of days / weeks to maximise the opportunity of getting hold of the correct person. |

### 4.2.2.2 Call-backs

A call-back is used to specify the exact day and time to queue a record to be redialled. This is usually the result of a contact requesting a call-back at a specific time when they have more time to discuss the subject of the call.

When using a Disposition code configured for a call-back, the end user will be prompted for the date and time of the call-back in Phone Manager.

### 4.2.2.3 Priority

Each Disposition Code can assign a different priority to recycled calls and call-back. The priority is used when populating the dialling queue for each campaign and allows contact records to be ordered based on the previous call result. The priority can be set between 1 and 99, 1 being the highest priority and 99 being the lowest.

For more information on how priorities are used, please refer to the [Dialling Queue](#) section.

### 4.2.2.4 User-specific

When recycling calls or booking call-backs, the follow up call can be targeted at the same agent that last called the contact record. This can help by sending calls back to users that have already laid down the ground work with a potential client.

If a user is not logged into Phone Manager Outbound when the call is due it will immediately be offered to someone else working the campaign the contact record is in. If the user is logged into the system but is busy on another call then they will be given time to come off the call to make their user-specific call. User-specific calls will expire though bases on the campaign setting [User Specific Call-back Expiry](#).

 If the **Callback Across Campaign** setting is enabled under the system's default settings, any user-specific callbacks will be presented to users even if they are logged into a different campaign at the time the callback becomes due.

### 4.2.2.5 Completed Calls and Conversions

If the result of a call requires that it not be dialled again then the completed Contact Strategy needs to be applied to the call's Disposition Code.

Completed calls are changed to the 'Completed' state in the database and will not be dialled again by the system.

A call may be dispositioned as a completed call for a successful or unsuccessful reason. If the result of the call was successful then the Disposition Code should be used to classify the call as a 'Conversion'. Conversions are defined on the system as successful calls and are used on real-time views and historical reports to define how successful a campaign has been.

## 4.2.3 Email Notification

When enabled, emails will be sent to the configured location upon the disposition code being entered by the user.

The email will be sent as soon as the disposition is entered, while the call is still in progress.

This is so that supervisors can receive real-time email notification of possible sales / conversions while the call is still in progress. In addition to the email groups defined under the Disposition Code, notification emails will also be sent to the email group defined against the campaign the call was made from (if configured).

To use email notification on Disposition Codes, [email groups](#) need to be configured on the system.

## 4.2.4 Wrap-up

Each disposition code has to be assigned a wrap up time. This is the amount of time given to the user once the call has been cleared down to complete any additional task that they may be required to do.

The user is presented with a countdown timer while they are in the wrap up state to indicate how long they have left.

For more information on user wrap up control refer to the [Phone Manager](#) Section.

If a user changes a disposition code during wrap up, the timer will change to reflect the wrap up of the new disposition code. If the user has already had more wrap up than is defined on the new disposition then their wrap up will be terminated immediately by the system and they will be presented with the next call.

## 4.2.5 Advanced Disposition Settings

The following disposition settings are used to control more advanced features regarding contact Strategy and call attempts. It is important that the implications of each setting is understood before using them on the system.

### 4.2.5.1 Clear Call

Phone Manager Outbound can will automatically clear down a call that has been dispositioned with this feature enabled. The call will be cleared immediately upon the Disposition Code being entered.

This feature is primarily used for busy / engaged numbers, the system will automatically disposition and calls that it detects are busy (through trunk signalling) and then clear them straight away so that the next call can be made without the user having to manually intervene.

Another common usage for this feature is when using the "Automated Answer" Contact Type or when dispositioning a call as an "Invalid Number". In these circumstances clearing the call down can be combined with dispositioning, giving the user one less thing to do.

### 4.2.5.2 Transferring Calls

Phone Manager Outbound can transfer a call to away from the user to another location if required. This is a direct transfer not an announced transfer and will be actioned as soon as the Disposition Code is applied to the call by the user.

This feature is most commonly used to automate the process of leaving voicemail messages for contacts. If a call is answered by a voicemail then the user can disposition the call to send it straight to a CRA or IVR port on the telephone system that can leave an automated message and then hang up.

When the 'Transfer Call' option is checked, a text box for the 'Transfer Destination' will appear. If the transfer destination is leaving an automated voicemail then check the box indicating this. The system will then monitor how many voicemails have been left for the user per day and will not exceed the limit configured against the campaign (if the limit it reached the system will clear down the call instead of transferring it).



Phone Manager Outbound does not check the status of the target device before the transfer is made, ensure there is enough capacity to accept transferred calls before enabling this feature.

### 4.2.5.3 Moving Campaigns

Phone Manager Outbound provides functionality to be able to move a contact record into a different campaign at the end of a call. This feature is commonly used when a contact record changes status for some reason. An example of this is a potential client that has expressed interest but requires a follow up call from a more senior member of staff. In this scenario the contact record can be moved in to a new campaign that the senior staff work leaving the standard users to keep canvassing for more interested contacts.

When a record is moved to a new campaign in this way its status will be updated to be 'Moved'. Any recycling or call-back settings that are applied to the disposition will take effect on a copy of the record in the campaign it has been moved to. The original record in the source campaign will no longer be available to be dialled once it have been moved.

### 4.2.5.4 Invalid Numbers

Any numbers that are out of service when dialled can be defined as such using this feature. When a disposition with this feature enabled is applied to a call, the contact record's state will be changed to "Invalid Number" and the record will not be dialled again.

### 4.2.5.5 Dial Next Number / Multiple Number Dialling

Each contact record imported into Phone Manager Outbound can have up to three telephone numbers. Depending on the result of each call it may or may not be necessary for Phone Manager Outbound to attempt to dial more than one number associated with a record.

If the 'Dial Next Number' setting is selected on the disposition for a call, Phone Manager Outbound will automatically dial the next number available for the record if it has one and will then recycle the call based on the disposition assigned to this new call attempt. If there are no additional numbers for the record then the system will accept the disposition being entered, apply the defined Contact Strategy and present the user with the next contact record.

Example: A contact record has two telephone numbers

|                                   |                                                                                                                                                                                                                                                                                                                                                                         |
|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><i>Call flow example 1</i></p> | <p><i>Telephone number 1 is dialled and there is no answer. The disposition code No Answer (135) has been configured to call the next number.</i></p> <p><i>Telephone number 2 is dialled and there is no answer. There are no further numbers for the contact so the call is recycled in the next shift as per the setting on the No Answer (135) disposition.</i></p> |
| <p><i>Call flow example 2</i></p> | <p><i>Telephone number 1 is dialled and is answered. The user dispositions the call as a callback for the next day.</i></p> <p><i>Telephone number 2 is not dialled because the disposition used is not configured to dial the next number.</i></p>                                                                                                                     |

### 4.2.5.6 System Codes

System codes are disposition codes that are automatically entered by Phone Manager Outbound at various stages of

the call. System codes can be edited (some settings of system codes cannot be edited) but they cannot be deleted.

When creating a new campaign, all the system codes will automatically be added by default but will not be visible to the end user to choose from, the system will handle applying these codes.

The following table outlines the list of system codes and in what circumstances they are used:

| Code                                 | Usage                                                                                                                                                                                                           |
|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| No Answer (135)                      | The default disposition each call attempt starts with. If the call does not get answered it will start and finish with this code.                                                                               |
| Busy (136)                           | This code is automatically applied to a call by the system if a failed event "FA" is received from the phone system through OAI with the necessary '3' event type.                                              |
| Specific Call-back (99)              | The code is the default code for use when creating call-backs.                                                                                                                                                  |
| Answered (140)                       | The system will apply the answered code to a call as soon as the "ES" event is received from the phone system OAI signalling. After this point it is up to the agent to manually change the result of the call. |
| Invalid number (138)                 | This code is automatically applied to a call by the system if a failed event "FA" is received from the phone system through OAI with the necessary '29' event type.                                             |
| Phone Manager Outbound Stopped (134) | If the system is turned off for any reason while there are calls in progress then the calls will be assigned this code if they have not yet been dispositioned by the user.                                     |

## 4.3 Dialling Process and Queue

The following section outlines how Phone Manager Outbound processes the contact records, prioritises between calls and assigns them to users.

### 4.3.1 Dialling Queue

Each campaign configured on the system has a virtual dialling queue which is an ordered list of contact records that are next up to be dialled on the campaign. On a regular basis Phone Manager Outbound will check the size of each campaign's queue and if it is less than half of the capacity then it will top the queue up with more data from the campaign tables.

Queues are used so that the system does not overload the database by asking for individual records to dial, instead batches of records are loaded which optimises database performance and ensures there is always data ready when a user logs in.

The capacity of the queue (number of contacts records that can be loaded into the queue) is dynamic based on the number of users working on the campaign.

- No users or less than 2 users working the campaign, queue Length is 10.
- More than 2 users working on the campaign, queue length 4 x no of users working the campaign

 The number of users working the campaign is the number of users that are assigned to the campaign in question and logged into it.

### 4.3.2 Loading Data

If a queue for a campaign is less than half the capacity Phone Manager Outbound asks the database for a batch of records equalling the number of records required to fill the queue.

Example:

A campaign has 10 users working on it so the queue capacity is set to 40.

Phone Manager Outbound checks the queue length and it is at 13 records. Phone Manager Outbound will request 27 records from the database for this campaign to top the queue back up again. (If less than 27 records are available then the database will return what it can).

Any new data will then be loaded into the back of the queue. At this point the queue is not re-ordered so any data still in the queue will be dialled before the new batch that has been added to back.

When deciding which contact records to dial next the following concepts are used:

- Valid Data, data which is ready to be dialled.
- Ordering, which data is more important to dial.
- New contact record %.

The following sections outline the different concepts and how they are used when populating the dialling queue.

### 4.3.2.1 Valid Data

Only data which is currently valid to dial will be added to the dialling queue. Valid data is any contact record that meets all of the following rules:

- The record is in the 'New Record', 'Recycle' or 'Call-back' state.
- In the case of 'Recycle' and 'Call-back' states, the time to call must have been reached.
- Minimum time since the record was last dialled has passed (based on regulations).
- The time must be within the valid ties set for the record's region.

### 4.3.2.2 Data Ordering

Any records found that are valid to dial will then be ordered based on the following details:

1. Call-back / Recycle Priority.
2. Call-back / Recycle Time.
3. Order in which records were added to the campaign.

Once the records have been ordered then they will be added passed back to the system to be added to the queue.

### 4.3.2.3 Call-back / Recycle Max Queue %

When querying valid contact records to add to the queue the system treats Call-back / Recycled records differently to the New Records. Based on the "Max callbacks/recycled calls in queue" setting against the campaign, the system will query the call-backs and recycled records first and then top up the remainder of the batch with new records from the campaign table.

Without this percentage, because the records are ordered by priority first, it can be possible for the queue to be 100% filled with call-backs to the detriment of new records. By setting the max % level the user can effectively set the priority new records take over call-backs / recycled calls.

The default value used for this % is 50. Configured in this way, any batch of data being added to the queue would have no more than 50 call-backs / recycled calls as long as there was new data still available to be dialled.

Example:

A campaign's queue has a capacity of 100 but has only 40 records. The campaign's max callback / recycle call

% is set at 50.

Phone Manager Outbound requests 60 records to add to the queue from the database. The query returns 30 valid callbacks and 30 new calls to top the campaign.

### 4.3.2.4 User Specific Queues

User specific calls behave slightly differently to general call-backs / recycled calls if [User Specific Call-backs Across Campaigns](#) has been enabled. In this scenario, when the system loads user specific calls from the database they get added to a user's queue, not the campaign's queue.

## 4.3.3 Dialling Process

The following section outlines the dialling process the system goes through for each user, from the moment they start a call to when the wrap they have been assigned finishes.

When a user first logs into Phone Manager Outbound to begin dialling they will be given a 5 second period where the system will process the login before it will commence dialling. This includes making sure records are loaded into the campaign the user may be dialling from and also syncing the user's status with their agent ID on the phone system if configured.

Once dialling commences the Phone Manager UI will loop through a sequence of outbound calls until they are logged out, either at their own request or because the campaign's status is not valid for dialling. The section below outlines the different user states and how the user can update the call status and/or their own status.

### User Status

This section of the Phone Manager Outbound form provides the end user with information about what status they are in and provides functions to change the status.

At the top of the section the current user status is shown along with a timer. Depending on status, the timer will either count up or down. The table below shows all the states a user can be in:

| State      | Description                                                                                    | Timer       |
|------------|------------------------------------------------------------------------------------------------|-------------|
| Logged Out | Initial status when opening the Phone Manager Outbound form.                                   | None        |
| Wrap Up    | Status after a call has cleared down or after logging in (5 seconds wrap up on login).         | Counts down |
| Pause      | Manual status requested by the user during wrap to give themselves more time or go on a break. | Counts up   |
| Busy       | When dialling or connected to a contact.                                                       | Counts up   |
| Blending   | If an inbound call is taken at any time the user will be placed in the blending state.         | Counts up   |
| Free       | If blending is enabled this status will follow wrap up.                                        | Counts up   |

The form provides functions for changing status and controlling any call that is currently at the extension.

### Call Status / Dispositioning

This section displays the status of a Phone Manager Outbound call at the extension. It shows the current disposition and provides the user with a list of disposition codes that are valid for the use on the call based on

the campaign settings.

The dispositions to select from will automatically change for each call depending on which campaign the call is from.



If the user makes a mistake they can enter another code on the call, the system will use the last disposition entered.

## Multiple Calls & Transferring Calls

Under normal operation Phone Manager would display the call toaster when there is a call at the local extension. When making Phone Manager Outbound calls it will hide the toaster if the only call at the extension is Phone Manager Outbound initiated.

If an inbound call alerts the extension or there is more than one call at the extension (in the case of a consultation transfer) then the toaster will be displayed so that multi-call operations can take place.

To transfer a Phone Manager Outbound call the main Phone Manager window can be used as normal by double-clicking a user on the contacts view or using the search & dial text box. When the consultation call is being setup the toaster will then appear to provide the necessary controls to complete or cancel the transfer.

## 4.3.4 Blending Inbound Calls

It may be a requirement for outbound users to field inbound calls at certain times. This can be for a variety of reasons:

- Contacts are returning missed campaign calls
- Users need to help out with overflowed inbound calls in busy periods.
- Users that are primarily inbound but use Phone Manager Outbound to keep busy during quiet periods.

When Phone Manager Outbound Users also take inbound calls this is called blending. Phone Manager Outbound provides a timer to be set against users that will also take inbound calls. For the duration of the timer, Phone Manager Outbound will leave the user in the 'Free' state once their outbound wrap-up has finished so that they are available to take inbound calls if so required.

The duration of the timer depends on the type of user they are. If users are primarily inbound then you would set the timer higher so that they are more likely to be available to take inbound calls. If a user just needs to take overflow calls then the timer can be set low, if there is an inbound call queuing then they will be presented with it as soon as their wrap-up finishes and the system will stop sending them outbound calls.

### Configuring Blending

Blending is configured against a user's Client Profile on the MCS server. To enable blending check the box on the *Phone Manager Outbound* tab, this will show the timer setting where the blending time in seconds can be configured.



Phone Manager Outbound cannot stop inbound calls being presented to the user's extension. Even with the blending timer enabled users can still have inbound calls presented.

## 4.4 Campaign Configuration

Each campaign created on the system is a combination of a data that has been imported and configuration settings outlining various elements of how the data should be dialled.

Creating a campaign is a straight forward process of entering a name of the campaign and configuring the initial settings for it. The campaign creation button can be found on the main [Campaign Status view](#) of the website.

If [International dialling](#) has been enabled at system level then the user will be prompted to select which region the campaign will contain data for. The region can only be chosen at the point of creating a campaign and cannot be changed afterwards.

The following section documents the various configuration options for each campaign and when they should be used.

## 4.4.1 General

The following settings of a campaign.

### Campaign name

A user friendly name to outline the source of data or type of contacts being dialled. The campaign name will be visible to the end user through the Phone Manager interface when dialling.

### No answer timeout

The no answer time out is the amount of time Phone Manager Outbound will wait after the call starts ringing before it classifies the call as no answer and hangs up. Any call that finishes in this matter will be assigned the No Answer disposition.

 The [ignore clear on ringing](#) system wide setting by default is enabled. This will stop end users clearing down calls through Phone Manager before the no answer time has elapsed.

 Depending on the region being dialled, there may be [regulations](#) on the minimum length of time that a call must ring before it can be classed as not answered and hung up.

### Calling party number

This allows a specific calling party number to be defined when making calls from this campaign. When left blank the calling party number at system level will take effect. For more information please reference the [Calling Party Name & Number](#) section.

 If this setting is not visible then [Calling party number](#) has not been enabled at system level.

### Calling party name

This allows a specific calling party name to be defined when making calls from this campaign. When left blank the calling party name at system level will take effect. For more information please reference the [Calling Party Name & Number](#) section.

 If this setting is not visible then [Calling party name](#) has not been enabled at system level.

### Dial prefix

If a dial prefix is set at campaign level it will be used instead of the normal outgoing access settings set on the MCS. This is useful to force a specific campaign's calls out of certain trunks or add a required prefix to perform a function at PSTN level. For more information refer to the Outgoing Access section.

### Number barring

This option allows a single Barring table group to a campaign. Once assigned, the campaign's records will be clean against any barred number tables that belong to the group. For more information refer to the [Barred number](#) section.

If a default barring group has been configured then this setting will have a barring table applied by default on creation of the campaign.

### User-specific call-back expiry

This setting defines the amount of time the system will wait before any callbacks/recycled records that have been designated as User Specific get assigned to another user that is working on the campaign. For more information refer to the [Contact Strategy](#) section.

### Use default max call attempts

If checked the default max call attempts set at system level will be used. If unchecked a campaign specific value will be used.



Changing this value will not affect historical data. If records have already been change to the 'Max Call Attempts Reached' status then they will not be reset by increasing this value.

### Max voicemails limit

This setting tells the system what is the maximum number of voicemails that can be left per day for contact record when using the advanced Transfer Call feature of a disposition code. For more information refer to the [Disposition Codes](#) section.

### Max callbacks/recycled calls in queue

This setting outlines the maximum number of call backs that will be added to the dialling queue each time it is re-populated. For more information refer to the [Dialling Queue](#) section.

### Notification emails

Any disposition codes that are configured to send an email will be copy in the email group configured here.

### Low data warning threshold

The campaign status screen will display a warning colour once the number of valid calls reaches the threshold defined here. For more information refer to the [Campaign & User Screens](#) section.

## 4.4.2 User Assignment

This screen allows the user to specify which users should be working on the campaign. The list box on the left shows all users not assigned to the campaign and the one on the right show all users that are assigned to the campaign.

If a user's name on the left appears light grey then they are currently assign to a different campaign, if it appear black then they are not currently assigned to another campaign.

## 4.4.3 Dispositions Assignment and Overriding

When creating a campaign it is important to assign the disposition codes from the central pool that are applicable. Only disposition codes that are assigned to a campaign will be available to users when dialling records from the campaign.



All System Codes will automatically be assigned to any campaign created and cannot be removed. They appear in red.

Once the disposition codes that are applicable to the campaign have been assigned, they can then be reordered so that they appear to the user in the required format. Do not worry about the ordering of the system codes that appear in the assigned list, these will not be visible to the end user through the Phone Manager interface.

By default, campaigns will use the central settings of any disposition codes assigned. If required, some of the settings of assigned dispositions can be overridden on a campaign by campaign basis. This is useful for implementing different contact strategies for each campaign. It is also very useful for increasing the wrap for users running on the dialler for the first time while they are getting to know the system.

If a disposition code is deleted from the central Phone Manager Outbound dispositions then it will automatically be unassigned from any campaigns that are using it.

### 4.4.3.1 Settings that can be overridden

The following settings can be overridden on disposition codes at campaign level. Any setting not referenced here can only be configured at system level.

#### Wrap up

Override the amount of wrap up given to users on calls for this campaign

#### Email

Override the recipient email groups for the disposition

#### Priority

Override the priority set against any callbacks / recycled calls. The contact strategy itself cannot be overridden.

#### Delay

Override the delay set against any callbacks / recycled calls. The contact strategy itself cannot be overridden.

#### User Specific

Override whether a callback or recycled call is user specific. The contact strategy itself cannot be overridden.

#### Conversion

Override whether the disposition is a conversion or not. The contact strategy itself cannot be overridden.

#### Clear call

Override whether the system clears down the call when the disposition is entered

#### Call next number

Override whether Phone Manager Outbound will look for another number against the contact record when the current call finishes.

#### Transfer call

Override whether Phone Manager Outbound transfers the call or override the transfer destination.

### 4.4.4 Webpage Screen Popping and Phone Manager

Each campaign can be configured to present the end user with one of the three different Phone Manager Outbound views available. The selection about which view is shown is made on the campaign details "Screen Pop" tab.

 For information on the different view available, refer to the [Phone Manager User Experience](#) Section.

When selecting to 'Load web page', a text box will appear to enter the URL for the page to be loaded during the call. Contact specific information from the import can then be passed to the URL in the format of a query string.

Example:

```
https://www.google.co.uk/?gws_rd=ssl#q={field1}
```

In this example the data from Field1 for the contact being dialled will be swapped for the placeholder '{field1}' when the call is made.

Any of the first 10 imported fields can be passed to the query along with user details and campaign details:

- {field1} to {field10} One of the ten imported fields
- {tel1} to {tel3} One of the three imported phone numbers
- {tel} The number dialled
- {campaignid} The GUID of the campaign the record belongs to
- {campaignname} The name of the campaign the record belongs to
- {username} The username of the user making the call
- {id} The GUID of the record being dialled

If required, more than one field can be added to the URL string to send the required data to the web page being loaded.

## 4.4.5 Preview Mode

Each campaign has an option for allowing the user to preview the call before it is dialled. This can be useful when the user needs time to read call notes or familiarize themselves with the contact before the record is dialled.

When a call is previewed, any contact details or screen pop configured will be displayed to the user. While in preview mode, the call is given a system disposition code of 'Previewing', code 133. This code will be applied to the call if the user selects to 'Skip' the call.

The following settings are used to enable previewing and control various aspects of it:

### Enable Record Review Before Calling

Controls whether 'Preview Mode' is enabled or disabled. When disabled, calls will be progressively dialled. When enabled, the user will be given a preview of each call.

### Preview Time

If 'Preview Mode' is enabled, this time controls how long the user is given to preview the call before it is dialled.

### Allow User to Pause Preview Time

If enabled, this allows the user to pause the preview time before the call is made. When paused, the call will be dialled as soon as the user un-pauses.

### Allow User to Disposition While Previewing

If allowed, the user will be presented with the dispositions for the campaign and will be permitted to use them during the preview time. If a call is dispositioned during preview, it will not be dialled. Instead, the recycling/call-back rules for the disposition chosen will be applied and the user will be presented with a preview of the next

call.

#### Allow User to Skip Previewed Calls

If allowed, the user can skip a call and move straight to the next one. This is similar to dispositioning a call during preview. The call will be dispositioned with the 'Previewing' code of 133 and the recycling/call-back rules for this disposition will be applied.

## 4.4.6 Campaign Level Shifts

Each campaign will conform to the shift times set at system level unless they are overridden. When overriding the shift times, the screen will pre-populate with the system level shifts to give a good starting point. For more information please refer to the [Shifts](#) section.

## 4.4.7 Valid Campaign Numbers

The valid numbers for each of the three telephone numbers that can be imported into a campaign can be set here. By default the **Use default** setting will mean the campaigns phone numbers will be checked against whichever Valid number setting is set at system level for the campaigns region. For more information refer to the Valid Numbers section.

## 4.4.8 Offline Campaigns

When not in use, campaigns can be taken offline to clear up the UI so that only online campaigns are visible. When campaigns are offline they cannot be dialled from because background call queue processing and valid dial time processing are turned off.



If there are users dialling on a campaign when it is taken offline they will be logged out once the call they are currently on finishes.

## 4.4.9 Shifts

Shifts are an important part of Phone Manager Outbound, they are used for two core purposes:

- Control when users can dial, both at a system and campaign level.
- Dictate the contact strategy for recycled calls.

By default, an initial set of shift times is configured on the system. These default shifts can be deleted / changed as required.

### 4.4.9.1 Managing Shift Times

To expand an existing shift time, simply drag the top and / or bottom of the shift to the required size. To move a shift, left mouse click on the shift and then drag it to the required location before releasing the mouse button.

To add a new shift time, left mouse click in an empty location where the shift time should start then drag the mouse to where it should finish before releasing the mouse button.

If required, shift times can span more than one day.

As with most changes to configuration on the Phone Manager Outbound website, it can take up to 2 minutes for Shift Modifications to take effect on a live system.

 Shifts can be [overridden](#) at campaign level if required.

## 4.4.9.2 Shift Dial Times

The primary job of Shifts is to stop users dialling outside of their normal working hours (in addition to Shifts, Time zone & Regional Dial Times will affect when users can dial). If a user attempts to log in to a campaign at a time when no shifts have been configured, they will be logged out automatically with a message indicating that their shift has ended.

## 4.4.9.3 Recycling Calls with Shifts

Shifts are also used in conjunction with dispositions to automatically recycle calls through a series of shifts to help maximise the opportunity of a right party contact. When recycling calls in this way Phone Manager Outbound will select a random time in the target shift to call the contact back. By configuring the shift times, recycling delay and max call attempts correctly the system can spread dial attempts over a range of days and times so that the opportunity to reach contact is maximised.

Shifts can be added by left clicking in an empty section of the shift calendar and dragging the mouse to the required location. Shifts can be edited by dragging the shift to a new location or expanding the top or the bottom of the shift to increase the time it covers.

## 4.4.10 Record Search (updating a dialled record)

There are number of reasons why the status of a contact record needs to be updated outside of the normal dialling process:

- Wrong disposition was entered on the call.
- Contact has called back into the system and the contact record needs updating.
- Someone has asked to be removed from a campaign.

To update a contact record it must first be located on the system. The Record Search section of the website provides an interface for supervisors to search for contact records using any of the imported data. Searches can be system wide or limited to a single campaign.

Once the record to be updated has been located using the search interface the current status of the record and the last disposition entered should be visible.

For more information on call states please refer to the [Contact Record Lifecycle and States](#) section.

At this point there are different operations that can be performed on the record depending on requirements:

- [Deleting Records](#)
- [Pause and Un-pause Records](#)
- [Changing a Call Result](#)

 If the contact record is already in the dialler queue to be dialled there is nothing that can be done using any of the listed functions to stop it.

### 4.4.10.1 Deleting Records

Deleting a record removes it from the campaign so it will never be dialled again. This is permanent action that cannot be undone. In the campaign table the contact record will be marked as deleted and can only be accessed again by exporting all the data from a campaign.

### 4.4.10.2 Pause and Un-pause Records

Pausing a record will temporarily remove it from the pool of records that can be loaded into the dialling queue. If any call-backs or recycling has been configured against record this will suspended until the record is un paused.

### 4.4.10.3 Changing a Call Result

The result of the last call to a contact record can be updated to reflect a new disposition. This may be because the previous disposition was entered by mistake or circumstance for this contact record have changed.

When a new disposition is applied to a record in the manner, the recycling of the call will be changed to match the new code entered. If the new disposition code indicates a call-back then a date and time for the call-back will need to be entered before the new disposition can be applied.

When applying disposition codes retrospectively in this manner, the following disposition code settings will be ignored:

Wrap up, Transferring Calls, Email Notification, Dial Next number

## 5 Status Screens and Historical Reporting

Phone Manager Outbound provides the user with a range of real-time\* and historical tools to help track how well campaigns are doing, whether targets are being met and what the current status of the campaign is.

\*Real-Time screens update on a regular interval of 5 seconds to avoid overloading the database.

Phone Manager Outbound provides three different types of status views to help users of the website see how their staff and campaigns are performing.

- Campaign Overview, shows the status of all campaigns and some system level statistics
- Campaign Specific, shows more in depth data on a single campaign as well as status information on any users assigned to the campaign
- User Overview, shows status information on all users on the system

All the status views are accessible from the 'Campaign Management' section of the website.

### Campaign Status Icon

The campaign status icon gives users a clear indication of the operational status of the campaign. Its purpose is to ensure that the user knows if any campaign cannot be dialled for any reason or if a campaign was running low on data.

The table below outlines the different status icons for campaigns:

| Icon    | Status Description                                                                                                                                                                                  |
|---------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Grey    | Shift ended, This is either the system level shift or the campaign overridden shift                                                                                                                 |
| Red     | No valid calls, the campaign is within shift but there are no valid records to dial at this time. This could be because the current time is outside the valid time window for the campaign's region |
| Yellow  | Low valid calls threshold has been reached, the campaign is within shift but the number of valid records to dial has dropped below the threshold configured against the campaign                    |
| Green   | Ready to dial, the campaign is within shift and then are valid records to dial                                                                                                                      |
| Spanner | Maintenance mode, the campaign cannot be dialled from until a barred number clean has completed                                                                                                     |

The campaign status icons are visible on the Campaign Overview screen and the Campaign Specific screen. Using this icon, supervisors can easily see if there is a problem or potential problem with a campaign if Phone Manager users report they are not getting any calls from the system.

### 5.1 Valid Calls Statistics

The number of valid records to dial can be affected by many different things. Being aware of the number of records that are valid to dial is obviously very important for keeping users busy on calls.

The following things affect when records are valid to dial:

- Call-back/recycle times
- Shift times
- Regional valid dial times
- Maintenance mode (importing new barred number data)

It is important to be aware of these factors when planning contact strategy. Recycle records too slowly and the users will run out of data. Recycle them too quickly and the data will be used up and wasted.

If the number of valid records for a campaign drops below the low data threshold then an amber warning will appear on the status screen to indicate the campaign could be running out of data. This should prompt a supervisor into action to add more data or move users to a new campaign if one is available.

## 5.2 Reporting

Phone Manager Outbound offers a range of historical reports on the system that can be run over varying lengths of time. The reports are designed to provide supervisors with historical information about how well users and campaigns have been performing.

When a user requests reports they are run in the background by the Campaign Processor service and are then distributed via email or to a network share.

 Although the reports are run in a separate service to the dialling process they do use the same database. Running reports over a large period of time can have adverse effects on the database and should be only be run when the system is not in use for dialling. The scheduled task process is useful for automating the reporting process out of hours.

### 5.2.1 General Report Settings

Reports can be run from the 'Data Management' section of the website. To run a report, a report definition must first be created.

The following settings need configuring when creating a report definition:

- **Description** - A friendly name to help distinguish the report definition from others.
- **Report type** - Which report is to be run, select one of the reports available in the drop-down.
- **Campaign** - If required the report can be filtered by campaign. When left empty, the report will be run across all campaigns.
- **Still send blank reports** - If there is no data when a report is run, this setting can be used to define whether to still send an email or not.
- **Report range** - The report range outlines the period of time the report should return data for. For a specific date or range of dates, select custom and pick the dates required. Selecting one of the relative options is more useful for repeat running of the report.
- **Send to** - This outlines which email groups and/or network shares should receive a copy of the report.
- **File options** - Various file options for report output. The Excel option is not available on the 'Call List General' report due to possible file size. If reports get over 10MB in size they will usually be blocked by the email server. In these situations use the zip function.

Once all options have been configured, the report can then be saved and run. Now the report has been defined it can be run again with a single click or added to a schedule to be run automatically.

 Sending blank emails when there is no report data can help reduce support calls.

## 5.2.2 Report Types

The following table outlines the reports that can be run on the system:

| Report Name           | Description                                                                                                                              |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| Call List General     | Provides a list of all calls made by the system                                                                                          |
| Calls by Outcome      | Groups the calls made by the disposition of the call                                                                                     |
| Calls by User         | Groups the calls made by the user that made the call                                                                                     |
| Campaign Status       | Snap shot of the status of the campaigns on the system. This report is useful for current information but not historical campaign status |
| User Status Breakdown | Breaks down the time users spent logged into the system by the different user states                                                     |

### Call List General

The Call List General report displays the individual calls that have been attempted by the system over whatever time period has been specified. Each call record is logged against the user that made the call attempt and contains the details of the record dialled along with the disposition the call ended with.

| Column                                          | Description                                                                                                |
|-------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| User Name                                       | The user name of the person who made the call attempt                                                      |
| Campaign Name                                   | The name of the campaign the contact record belongs to                                                     |
| Outcome & Outcome Description                   | The disposition code and description for the call attempt                                                  |
| Previous Outcome & Previous Outcome Description | The disposition code and description for the previous call attempt for this contact record if there is one |
| CLI Used & CLI Name Used                        | The calling party number and caller party name used when making the call                                   |
| Field1 to Field 10                              | The contents of fields 1 to 10 from the contact record                                                     |
| Field Supplementary                             | The contents of the supplementary field from the contact record                                            |
| Call Start                                      | The time the call attempt was made                                                                         |

|                              |                                                                                                                                                                                                              |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Call Answered                | The time the call attempt was answered (This will be the same as the Call Disconnected time if the call did not answer)                                                                                      |
| Call Disconnected            | The time the call attempt cleared down                                                                                                                                                                       |
| Call End                     | The time the wrap finished and the call result was saved down                                                                                                                                                |
| Ring Time & Ring Time (Secs) | The time the call attempt spent in the ringing state                                                                                                                                                         |
| Talk Time & Talk Time (Secs) | The time the call attempt spent in the connected state                                                                                                                                                       |
| Callback Time                | The time the call was originally scheduled for. If this was a new contact record being dialled then 'New Call' will be displayed                                                                             |
| Times Called                 | The number of times this contact record has been dialled in total                                                                                                                                            |
| Call Mode                    | 'Progressive'                                                                                                                                                                                                |
| Time To Find User (Secs)     | Not applicable                                                                                                                                                                                               |
| Result Type                  | 'Real Time' or 'Updated Post Call', call can be updated post call through Phone Manager or through the Phone Manager Outbound website                                                                        |
| Disconnect Reason            | 'Unknown' - Cannot determine who disconnected the call, 'Automatic' - Phone Manager Outbound disconnected the call, 'User' - The user disconnected the call, 'Customer' - The customer disconnected the call |
| RPC                          | Whether the call attempt was recorded as a right party contact                                                                                                                                               |
| Conversion                   | Whether the call attempt was recorded as a conversion                                                                                                                                                        |

## Calls by Outcome

The Calls by Outcome report gives a summary of the dispositions used on call attempts and shows the calls times, answered calls, right party contact and conversion for each disposition.

| Column                                   | Description                                                                                |
|------------------------------------------|--------------------------------------------------------------------------------------------|
| Outcome                                  | The name and number of the disposition code                                                |
| Calls                                    | The number of calls over the report period which have been dispositioned with this outcome |
| Calls Percent                            | The percentage of calls that have this disposition across all calls in the report          |
| Total Talk Time & Total Talk Time (Secs) | The amount of talk time for calls which have been dispositioned with this outcome          |
| Avg Talk Time & Avg Talk Time (Secs)     | The average talk time for calls which have been dispositioned with this outcome            |
| Total Ring Time & Total Ring Time        | The amount of ring time for calls which have been dispositioned with this outcome          |

|                                      |                                                                                 |
|--------------------------------------|---------------------------------------------------------------------------------|
| (Secs)                               |                                                                                 |
| Avg Ring Time & Avg Ring Time (Secs) | The average ring time for calls which have been dispositioned with this outcome |
| Answered Calls                       | The number of answered calls                                                    |
| Automated Answered Calls             | The number of automated answered calls                                          |
| RPC                                  | The number of right party contacts                                              |
| Conversion                           | The number of conversions                                                       |

### Calls by User

The Calls by User reports shows a summary of the calls made by each user, total & average call times as well as each user's answer, right party contact and conversion rates.

| Column                                   | Description                                                                                                 |
|------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| User Name                                | The name of the user making the call attempts                                                               |
| Calls                                    | The number of calls attempts made by the user                                                               |
| Calls Percent                            | The percentage of calls for this users across all the calls on the report                                   |
| Total Talk Time & Total Talk Time (Secs) | The total talk time for the user across the time period of the report                                       |
| Avg Talk Time (Secs)                     | The average talk time for the user across the time period of the report                                     |
| Total Ring Time & Total Ring Time (Secs) | The total ring time for the user across the time period of the report                                       |
| Avg Ring Time (Secs)                     | The average ring time for the user across the time period of the report                                     |
| Total Wrap Time & Total Wrap Time (Secs) | The total wrap time for the user across the time period of the report                                       |
| Avg Wrap Time (Secs)                     | The average wrap time for the user across the time period of the report                                     |
| Answered Calls                           | The number of answered calls made by the user across the time period of the report                          |
| Automated Answered Calls                 | The number of automated answered calls made by the user across the time period of the report                |
| Answer Rate                              | The number of answered calls at a percentage of calls made by the user across the time period of the report |
| RPC                                      | The number of right party contacts dispositioned by the user                                                |
| RPC Rate                                 | The number of right party contacts as a percentage of answered calls                                        |
| Conversion                               | The number of conversions dispositioned by the user                                                         |
| Conversion Rate                          | The number of conversions as a percentage of right party contacts                                           |

*Dispositions**A dynamic breakdown of dispositions entered by the user.***Campaign Status**

The Campaign Status report is a snap shot of the current status of the campaigns currently loaded on the system. Due to the report being a snap shot the time period for the report is not applicable.

| Column                        | Description                                                                                                                                                                                                                                                                    |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Campaign Name                 | The name of the campaign                                                                                                                                                                                                                                                       |
| Total Records                 | The total number of contact records currently in the campaign's data table                                                                                                                                                                                                     |
| Records Completed             | The number of contact records in the campaign that have reached a Completed state                                                                                                                                                                                              |
| Records Outstanding           | The number of contact records in the campaign that have not yet reached a Completed state. This includes new records and callbacks                                                                                                                                             |
| Calls Attempted               | The number of calls that have been attempted on the campaign                                                                                                                                                                                                                   |
| Callbacks                     | The number of contact records in the campaign that are currently in the callback status (Records Outstanding minus Callbacks will equal the number of contact records in the campaign that have not been dialled yet)                                                          |
| Valid Callbacks               | The number of contact records in the campaign that are currently in the callback status and that are ready to dial right now (This means that the callback time is past due and the contact record's telephone number(s) are valid to dial based on regional valid dial times) |
| Moved Campaign                | The number of contact records in the campaign that have been moved into another campaign                                                                                                                                                                                       |
| Max Attempts Reached          | The number of contact records in the campaign that have reached the Max Call Attempts state                                                                                                                                                                                    |
| Deleted                       | The number of contact records in the campaign that have been marked as Deleted                                                                                                                                                                                                 |
| On Hold                       | The number of contact records in the campaign that have been placed in the On Hold state                                                                                                                                                                                       |
| Barred number                 | The number of contact records in the campaign that have been marked as Barred (This will happen if a barring table associated with a campaign is updated and a matching record already exists in the campaign table)                                                           |
| Invalid                       | The number of contact records in the campaign that have been marked as Invalid                                                                                                                                                                                                 |
| <i>Completed Dispositions</i> | <i>Dynamic number of fields outlining the breakdown of dispositions from all the campaign's completed contact records</i>                                                                                                                                                      |

**User Status Breakdown**

The User Status Breakdown report is designed to show a breakdown of the user's time while they are logged into the system. This allows for comparison between users with different performance levels.

| Column                         | Description                                                                     |
|--------------------------------|---------------------------------------------------------------------------------|
| Username                       | The name of the user                                                            |
| Logged In & Logged In (Secs)   | The amount of time the user spent logged in over the report period              |
| Idle & Idle (Secs)             | The amount of time the user spent in the idle state over the report period      |
| Ringing & Ringing (Secs)       | The amount of time the user spent in the ringing state over the report period   |
| Connected & Connected (Secs)   | The amount of time the user spent in the connected state over the report period |
| Blending & Blending (Secs)     | The amount of time the user spent in the blending state over the report period  |
| Wrap Up & Wrap Up (Secs)       | The amount of time the user spent in the wrap up state over the report period   |
| DND & DND (Secs)               | The amount of time the user spent in the pause state over the report period     |
| Total Time & Total Time (Secs) | The total time the user spent on the system                                     |

## 5.3 Scheduled Tasks

Scheduled Tasks is a straight forward feature of the Phone Manager Outbound solution which provides an interface for performing multiple data operations in one go and/or running them on a scheduled basis.

Importing, exporting and reporting tasks can all be automated to reduce the amount of time needed by management staff and to make sure long running tasks can occur overnight so that they have less impact on system performance.

### Creating Scheduled Tasks

Scheduled tasks are created and managed from the 'Data Management' section of the Phone Manager Outbound website. When creating a new scheduled task, the following settings need to be configured:

#### General Settings

The general settings include a description for the schedule and also an email group that will receive messages when the schedule task runs.

The 'Stop on error' setting defines whether the schedule should run all tasks no matter what happens or whether it should stop when one task fails.

#### Schedule

The schedule defines when the scheduled task should run. If on demand is selected then the scheduled task will only run when manually started from the website by a user. This is still a useful feature to run multiple tasks in one go rather than having to run them individually.

If one of the other schedules is selected then the scheduled task will automatically run when the schedule settings are met.

The schedules are flexible in when they can be repeated. The shortest schedule that can be set is an hourly one.

**Tasks**

The final configuration is the selection of which tasks will be run. Any number of imports, exports and reports can all be configured to run under a single schedule. The tasks will be processed in the order in which they appear in the list.

A common example of schedule use is to export all calls out of a campaign at the end of a shift and then re-import new data for the next day. By having both of these tasks belong to the same schedule you can be sure the export finishes successfully before importing the new data.

When importing data using a schedule, the user is not available to browse for the file. Instead [network shares](#) must be used for the import.

## 6 General Configuration

The general settings are system wide settings that manage how Phone Manager Outbound operates. Many of the settings can be overridden at campaign level if required.

### Admin email address

The admin email address is used as a back up in case the configuration of emails against Disposition codes is deleted.

### Region

Phone Manager Outbound needs to know in which region it has been installed. This is important so that it can track time zones and number formatting correctly.

Phone Manager Outbound is currently support in the following regions:

- Australia
- New Zealand
- North America
- UK

The region should default to the correct setting based on the region settings configured during installation and on the Mitel Communication Service.

### Allow dialling to different regions

If required, the system can support dialling to a different region from the one the system is installed in. By default, this configuration option is not enabled. For more information on dialling different regions refer to the [Regions & Time Zones](#) section.

### No answer timeout

This defines the system wide option for how long the system will wait before classing a call as no answer and automatically hang up. This setting is overridden at campaign level and will only be used when a campaign is first created.

### Use UK mobile definition & No answer offset for mobiles

For the UK region, mobile phones can easily be identified by their number pattern. Phone Manager Outbound offers away of increasing the No answer timeout for each UK campaign when a mobile number is dialled. This gives the call more time to route and increase the likelihood of getting a response from the contact dialled.

### Maximum call attempts

This represents the system level setting for how many times a contact record is called before the system will stop dialling it. This setting can be overridden at campaign level if required. For more information please refer to the [Contact Record Lifecycle & Status](#) section.

### Calling party number

This allows a specific calling party number to be defined when making calls on the system. When disabled the telephone system will control the calling party number presented. For more information please reference the [Calling Party Name & Number](#) section.

### Calling party name

This allows a specific calling party name to be defined when making calls on the system. When disabled the telephone system will control the calling party name presented. For more information please reference the [Calling Party Name & Number](#) section. Presenting a calling party name will rely on the carrier supporting

this feature. Check with your carrier for more information.

### Sync ACD agent status with user status

This setting enabled or disables the synchronisation of ACD Agent status on the telephone system to the Phone Manager Outbound User status (DND, Free, Wrap up etc). For more information refer to the [Agent Status Sync](#) section.

### Log off when idle

The setting controls whether Phone Manager Outbound logs a user out when the campaign they are assigned to has no valid data to dial. If disabled, Phone Manager Outbound will leave the user in the free state and will wait for the user to be moved to a new campaign or new data to be added to their current campaign. For more information refer to the [Dialling Process](#) section.

### Waiting for user to enter disposition

This enables or disables whether the system enforces the overwriting of the Answered call disposition or allows it has a valid call result. For more information refer to the [Dialling Process](#) section.

### Force DND Messaging

When waiting for the user to disposition a call, Phone Manager Outbound can place the user in a paused state so that they are visible to management. If required, the DND state can also be set against their extension on the telephone system to ensure their state is visible on other reporting and real time OAI packages.

When using this feature the DND message to set along with the DND text to be displayed can be configured. For more information refer to the [Dialling Process](#) section.

### Ignore clear call on ringing

This controls whether Phone Manager Outbound allows users to manually hang up calls before the no answer call timer has expired. By default this is set to true.

Warning: Check the dialling regulations for your region before modifying this setting

### Callback across campaigns

This controls whether Phone Manager Outbound will present user specific call-backs / recycled calls to users that are currently assigned to different campaigns.

### Include auto-answered calls in answer rate

The answer rate by default is calculated as the number of calls that were answered by a live person as a percentage of calls attempts. To include automated calls such as fax machines and voicemails in this calculation then enable this setting.

### Synonyms

When calculating campaign statistics the system uses the concepts of Right Party Contacts and conversions. These descriptions can be overridden here so that a synonyms used internally to describe these statistics can be used through the application. For more information refer to the [Campaign Statistics](#) section.

## 6.1 Email Groups

Emailing is used for in many places throughout the Phone Manager Outbound solution:

- Disposition notification.
- Reports.
- Import and Export notification.
- Schedule processing notification.

Email Groups provides a central way of configuring target destinations for emails. Each Email Group can be configured with one or more target addresses and can be enabled for use with reports and exports. By Default, all email groups are valid for imports.

Once an email group has been configured it can then easily selected throughout the application whenever an email address is required. This speeds up configuration and also means an email address change requires only one area to be updated rather than updating all the disposition codes / reports that use it.

 Phone Manager Outbound will use the SMTP settings configured within the Mitel Communication Service when sending emails.

## 6.2 Telephony

The following section outlines specific telephony functions and how the Phone Manager Outbound dialling process affects MiVoice Office 250 and trunk features.

### 6.2.1 Calling Party Name and Number

When making calls it is important to present the correct Calling Party Number (CPN or CLI) so that contacts know who is calling them and can return calls if necessary.

Calling party numbers can be programmed on the MiVoice Office 250 directly onto a user's extension however Phone Manager Outbound can override this at dial time to present a dynamic CPN, providing a greater degree of flexibility about which number is presented and when.

Phone Manager Outbound allows CPNs to be configured at each of the following levels.

1. Contact record.
2. Campaign.
3. System wide.

If a CPN is set at record level (CPNs can be imported with the campaign data) then Phone Manager Outbound will present this CPN in precedence to any set at campaign level. Likewise, if there is a CPN set a campaign level it will take precedence over the CPN set at system level.

Calling Party Name settings work in exactly the same way as Calling Party Numbers however not all trunk service providers will propagate a Calling Party Name in the same way they will a Calling Party Number.

 To double check the correct numbers are being presented the Call List General report can be used to see which CPNs were used for each call made by system.

#### Presenting numbers outside the inbound range

In some scenarios it can be a requirement to present a calling party number outside the range of inbound numbers assigned to the trunks. This may be because a non-geographic number needs to be presented or because the calls are being made on behalf of a third party in the case of an outsourced call centre.

In some countries carriers will not let a system present a calling party number which is outside the range of inbound numbers. To can usually be overridden, please contact your carrier for more information.

### 6.2.2 Outgoing Access

When making calls from a user's extension, Phone Manager Outbound will by default use the outgoing access setting from the Mitel Communication Service. This will usually be 8 or 9 depending on the database loaded onto the phone system.

In addition, all the dial plan rules configured on the Mitel Communication Service around local area codes etc. will be enforced by the system when making dialler call.

The system wide outgoing access can be overridden at campaign level is required by using the [Dial Prefix](#) settings.

## 6.2.3 Trunk Line Signalling

Phone Manager Outbound relies heavily on getting the correct signalling from the trunk lines / carrier and this being presented correctly through OAI.

### Answer Supervision

Answer supervision is key to Phone Manager Outbound knowing when the call gets answered so that:

- It can clear down the call after the no answer timer correctly. If the system doesn't know the call has been answered it will clear it down.
- Users can clear down the call manually if required. If the system doesn't know the call has been answered it may not let the user clear it down.

The phone system employs a 'Valid Call Timer' for lines that do not provide answer supervision. This assumes all calls that reach the specified time have been answered and sends the necessary OAI events to the system. It is important that this setting is never set below the no answer timer on lines with answer supervision because all calls will be treated as answered.

### Busy & Invalid Number Detection

Phone Manager Outbound uses the failed events from OAI to identify busy (engaged) and invalid numbers. This relies on the trunk lines passing the call state information in format that can be understood by the MiVoice Office 250.

The following Failed event codes are used by Phone Manager Outbound to automatically disposition calls:

- 3: Busy or Engaged, Phone Manager Outbound will disposition the call with code 136
- 29: Failed Call attempts, Phone Manager Outbound will disposition the call with code 138

## 6.2.4 Contact Name Display

When making calls on the system, Phone Manager Outbound will modify the display name on the extension to show the contents of field1 of the record being dialler. This is done for several reasons:

- Non dialler users of other PBX software can see who dialler users are talking to.
- Dialler contact record information can be passed to other users if a call is transferred.

To ensure that this information gets displayed on the phone systems extensions, the following MiVoice Office 205 system flags need enabling against the user's extension:

- Expanded CO Call Information On Displays
- Outside Party Call Information Has Priority
- Display Caller ID Name and Number - This can be used to display the name and number at the same time

## 6.2.5 Agent Status Sync

In some scenarios it may be beneficial to the customer to be able to see the status of Phone Manager Outbound users on other Mitel / OAI applications. This is especially useful when the MiContact Centre Office is already used on site for real-time and historical call monitoring.

In these scenarios, Phone Manager Outbound can synchronize the status of an ACD agent in a specific "Phone Manager Outbound" hunt group on the telephone system so that dialler user's state can be tracked.

To use this feature, the following configuration needs to be completed:

- Create a dedicated ACD Agent hunt group for Phone Manager Outbound on the PBX and configure it on the Mitel Communication Service website.
- Add Primary agent Ids to the user objects of all Phone Manager Outbound users on the Mitel Communication Service.
- Enable the **Sync ACD agent status with user status** setting under general configuration on the Phone Manager Outbound website.

Once all this configuration has been completed, Phone Manager Outbound will log a user's Primary ACD agent into the Phone Manager Outbound hunt group whenever they are logged in and working on the dialler. The wrap up and pause (DND) states will also be updated on the phone system to keep in line with the user's Phone Manager Outbound state.

In addition, any disposition codes entered by a user will also be entered as an account code on the call so that MiContact Centre Office and other products can report on campaign productivity. For more information please refer to the [MiContact Centre Office](#) integration section.

 If the ACD agent is a member of any other hunt groups for inbound calls then the user must manually log their Id in and out of those groups as and when they require.

## 6.3 Regions and Time Zones

When making outbound calls, it is important that they are made inside normal hours and not at an antisocial time. Making calls outside of normal hours can annoy potential customer and may be against dialling regulations for the region being dialled.

### 6.3.1 Valid Dial Times

At a regional level, Phone Manager Outbound allows a valid time window to be set that cannot be overridden by shifts, either at system or campaign level. This works as a back stop to ensure someone doesn't expand a shift time temporarily to make extra calls and inadvertently make calls outside the regions allowed times.

### 6.3.2 Multi-Zone Countries

If the region being dialled has multiple time zones, Phone Manager Outbound will automatically check the time for each contact and will make sure it is valid before adding it the dialling queue.

### 6.3.3 Number Validation

Most countries have special classes of numbers such as mobiles or premium rate numbers that you may not want to dial from a campaign. When Phone Manager Outbound imports records it can be configured to validate the telephone numbers against a regular expression which outlines the valid number format. Any numbers not matching the format will not be imported.

When importing contact records into a campaign, each of the three telephone numbers will get checked against a valid number pattern. The number pattern is a regular expression used to define the format of number that is acceptable for the system to import.

Phone Manager Outbound comes with a set of valid number patterns pre-defined for each region to cover the most common customer requirements. In its simplest form the patterns will confirm that the numbers being imported are consistent with a telephone number for the campaign's regions. Some of the patterns will in addition stop the user importing premium rate numbers or mobile numbers (where definable).

Each of the three telephone numbers a contact record may have can be validated against different valid number patterns if required. This may be to ensure that mobile numbers are only ever imported into telephone number 2 for example to maintain data consistency.

## Import Validation

During the import process Phone Manager Outbound follows these steps when checking telephone numbers:

1. Swap out local country code format (E.164) for the local toll digit

- +447711223344 becomes 07711223344
- +14809619000 becomes 14809619000

2. Remove non-numeric characters

- (0161) 11-22-333 becomes 01611122333
- 1-480-961-9000 becomes 14809619000

3. Check for missing toll digit

- 1611122333 becomes 01611122333
- 4809619000 becomes 14809619000

Once the number has been checked for consistency it is then checked against the valid number pattern. If there is no match then that particular phone number is ignored.

If there are other phone numbers for the contact record that do match the valid number pattern then the record will continue to be imported. If there are no valid numbers then the record in question will not be imported and the system will move to the next record to verify it.

## Default Number Validation

All numbers imported must be verified against a valid number pattern, there is no way to turn this off on the system.

When creating a new campaign, the valid number configuration for each of the three telephone fields will be set to 'Use default'. Left in this way, any imported records will be checked against whatever valid number pattern is set as default against the campaign's region. If the region's default valid number pattern is changed then any data imported into a campaign set to 'Use default' will automatically be validated against the new default.

 Changing the Valid Number pattern will not affect data that has already been imported, valid numbers are only checked during import.

## 6.4 Network Shares

Network shares can be used when exporting data or creating reports, however, they are most commonly used when importing data. Using Network Shares to move data around is a requirement when scheduling data movement to occur automatically without manual intervention.

When exporting data from a campaign or running a report, a network share can be chosen as one of the target destinations.

An optional sub-path can be entered to deposit the export / report in a sub folder of the share configured. If the sub-path configured does not already exist on the share selected then Phone Manager Outbound will attempt to create the sub folders at the time of running the export / report.

In versions prior to 5.0, Network Shares were configured within the Phone Manager Outbound user interface. From 5.0 onwards, the configuration for Network Shares has been moved into the main Mitel Communication Service website so that they can be used not only by Phone Manager Outbound, but for Call Recording and Call Reporting as well.



For information on configuring Network Shares, please review the Mitel Communication Service Help or Technical Manual.

## 6.5 MiContact Center Office Integration

Phone Manager Outbound can integrate with MiContact Centre Office to add campaign and account code information to its historical call information. When combined with the ACD agent Sync feature customers can use MiContact Centre Office to historically report on both inbound and outbound telesales calls.

Phone Manager Outbound integrates with MiContact Centre Office by connecting directly to the DB2 database and updating the historical records post call.

Phone Manager Outbound will ensure that the account code registered in MiContact Centre Office against the call is correct (may need to be updated if a user dispositioned the call during wrap up) and will enter the campaign name for the call in Field2 for the historical record.

In MiContact Centre Office, the user will then be able to use Field2 to filter historical and wallboard stats by campaign and will be able to use the account code to track how successful users and campaigns are.

For more information on configuring MiContact Centre Office integration refer to the [MiContact Centre Office configuration](#) section.

## 7 Phone Manager User Experience

Phone Manager is the main user interface (UI) for users making outbound calls from Phone Manager Outbound. Phone Manager provides a dedicated Phone Manager Outbound form that provides all functions and information necessary.

When making outbound calls there is often a need to interact with a third party piece of software. This may be because there is additional information that the user needs to see when on the call or because the user needs to update data or a process outside Phone Manager Outbound.

To cater for these different requirements, Phone Manager can display the Phone Manager Outbound form in one of three views:

### Minimized view

Used when screen popping / using third party applications. The Phone Manager Outbound UI becomes more of a toolbar leaving space on the screen for other applications. When using this mode the normal Phone Manager plugins/macros can be used to screen pop third party applications.

### Contact details view

Used when no third party applications are required. The Phone Manager Outbound UI takes up the whole screen and provides the user with easy access to all the features of the form.

### Embedded webpage view

Used when the third party application's interface is a web page. The Phone Manager Outbound has an embedded browser that will load the web interface.



The embedded webpage uses a Chrome browser engine. If there are problems with rendering on screen popping then the minimized view can always be used alongside a full browser window.

## End User Features

The Phone Manager Outbound form within Phone Manager is split into four main sections. Depending on the view chosen the sections will appear differently to the end user.

### User Productivity

The user productivity section displays to the user their daily productivity on the system. The statistics displayed outline the number of calls they have made and how successful they have been at getting through to the right person and then converting the lead into a sale.

The statistics shown are for all campaigns the user has been working on that day. The statistics will update once the call has finished wrap up.



Depending on how busy the database is there may be a delay in the statistics updating on the users screen.

### Contact Details

The contact details page gives the user as much information as possible about the person they are calling.

At the top of the section it displays the contact's name and the result of the last call that was made to them. The contact's details are then presented in three ways:

- Imported Fields, fields 1 to 10 from the imported data are shown to the user here. If there is key

information about the contact that the user needs to know they can read it from this section as the call is in progress.

- Call history, a complete history of all calls to the contact are listed here. This gives the user an idea of how often the contact has been called and allows them to have knowledge about previous calls if the contact mentions it.
- Notes, the notes section provides an optional way of adding information to a contact record during a call. The information will then be available to anyone calling that contact record in the future.

For more information on the Phone Manager UI in relation to the dialling process please reference the [Dialling Process](#) section.

## 8 Automated Dialling Regulations

Automated dialling is heavily regulated in most regions. It is important to research the regulations that are applicable for the region that Phone Manager Outbound is installed and also the region being dialled if it is different.

Phone Manager Outbound is not a predictive dialler so there are no issues regarding dropped call calculations because the system doesn't make a call when there is no one available to take it.

Commonly regulated areas include but is not restricted to:

- Minimum time an outbound call must be left to ring
- Restrictions over calling within sociable hours
- Restrictions on how often contacts can be redialled
- Regulations surrounding national barred number lists

The regulations for each region (and state) are not covered in this manual because they are updated on a regular basis. Ensure you research the regulations applicable to your region before implementing a Phone Manager Outbound solution.

## 9 Troubleshooting and Support

### 9.1 Diagnostics and Logging

Phone Manager Outbound provides a different set of logging options over and above that of MCS. MCS logging is still applicable to Phone Manager Outbound based on the services it provides:

- OAI, all OAI commands and events from and to Phone Manager Outbound are proxied through the MCS's connection to the telephone system
- Email, emails from Phone Manager Outbound are sent through the MCS WCF service using the SMTP configuration from the MC
- Database, database backups and updates are all done by the same MCS DB service that manages the MCS's databases

Information on diagnostics and logging information for all of the above functions can be found in the Mitel Communication Service Technical Manual.

#### Logging Options

Phone Manager Outbound's logging can be enabled/disabled from the 'Configuration' section of the website, under the advanced/diagnostics section.

Once diagnostics have been enabled a further three different types of logging can be enabled. The table below outlines what is logged for each type.

|                            |                                                                                                                                                                                                                                         |
|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Standard Diagnostics       | Once diagnostics is enabled all other forms of logging can be used. In addition, basic logging from the Phone Manager Outbound service will occur on all parts of the application.                                                      |
| Advanced logging           | Advanced logging provides more detailed logs especially in regard to data moving in and out of campaign. Advanced logging is required when tracking when records were loaded into the system and their journey there after.             |
| User based logging         | User based logging provides individual logs for each user outlining their status changes and the calls they make. This type of logging can be very useful for tracing call flow problems because the data is compartmentalised by user. |
| Phone system event logging | When enabled all OAI information between Phone Manager Outbound and the phone system is added to the logs. If User based logging is also enabled then OAI information is also added to the user based logs.                             |

#### Excessive Logging & Performance

Phone Manager Outbound and outbound dialling is extremely sensitive to the performance of the server that it is running on. Any performance issues with hard disks or CPU can slow down database access and in turn

slow down the rate of dialling on the system or cause unexpected errors.

Enabling diagnostics can cause a large amount of data to be written to the hard disks of the local server. If diagnostics are to be used they should be turned off as soon as the issue being investigated has been recreated and enough information has been collected.

## Diagnostic & File Locations

Phone Manager Outbound logs diagnostic information to the same parent folder as MCS.

*C:\ProgramData\Mitel\Mitel Communication Service\Logs\CampaignManager*

This is the main location of all diagnostic logs. The table below outlines each file found in the logs folder and its typical content.

| File Name               | Diagnostic Level           | Content                                                                           |
|-------------------------|----------------------------|-----------------------------------------------------------------------------------|
| CM                      | Standard Diagnostics       | General information about Phone Manager Outbound processes                        |
| CM_Campaign.XXX         | Advanced logging           | Information regarding each campaign's settings and data queue                     |
| CM_CampaignManager      | Advanced logging           | Information about the database queue and stored procedures called on the database |
| CM_Data                 | Advanced logging           | Information about system level interaction with the database                      |
| CM_IP                   | Phone system event logging | Telephone system communications log                                               |
| CM_UpdateTimezoneStatus | Advanced logging           | Diagnostics from the service that updates campaign and time zone valid dial times |
| CMP                     | Standard Diagnostics       | General information about the data manager tasks service                          |
| CMP_XXX_.TaskChecker    | Advanced logging           | Information about all tasks executed                                              |
| CMP_Export              | Advanced logging           | Information regarding exports and reports                                         |
| CMP_SettingsUpdate      | Advanced logging           | Diagnostics on settings being loaded from the WCF and database                    |
| Users SubFolder         | User based logging         | Sub Folder containing individual logs per user                                    |

## Other Files

As well as diagnostic logging for the application the system also stores historical information of data files that have been imported/exported from the system in addition to detailed logs on each individual import.

These files are stored in a different location to the diagnostic logs.

*C:\ProgramData\Mitel\Mitel Communication Service\Phone Manager Outbound*

The following table outlines the different files that are stored here.

| Folder                    | Contents                                                                                          |
|---------------------------|---------------------------------------------------------------------------------------------------|
| CampaignManager Templates | Email templates used by Phone Manager Outbound when sending emails on disposition entry           |
| Exports                   | Copy of data that has been exported from the system                                               |
| HistoryExports            | Staging folder                                                                                    |
| ImportLogs                | Copy of individual import logs. These can be useful for investigating inconsistent import results |
| Imports                   | Copy of data that has been imported into the system                                               |
| MailAttachments           | Copy of reports that have been run on the system                                                  |
| NetworkImports            | Staging folder and archive of files sourced from network shares                                   |

## Archiving & Purging

To limit the amount of data that Phone Manager Outbound stores there are a number of processes that tidy up the diagnostic and historical data generated.

Each night the diagnostics logs will be zipped up and copied to the diagnostics location on the server.

*C:\Diagnostics\Logs*

Phone Manager Outbound logs can be found inside the MCS diagnostic logs zip files in the format cslogs\_YYYYMMDDHHMMSS.zip. By default up to 100 days' worth of information is kept in the diagnostics logs folder after which the zip files are deleted.

All other historical data that is stored is removed after 90 days.

## 9.2 Auditing

The audit section is for Mitel Technician use only and is not covered in this manual.

## 10 Configuring MiContact Center Office Integration

Phone Manager Outbound can be integrated into MiContact Centre Office to provide extra information that can be used directly within MiContact Centre Office reports. Follow the procedures below on the MiContact Centre Office server and the Phone Manager Outbound server to configure the integration.

 Tested with MiContact Centre Office Version v6.2

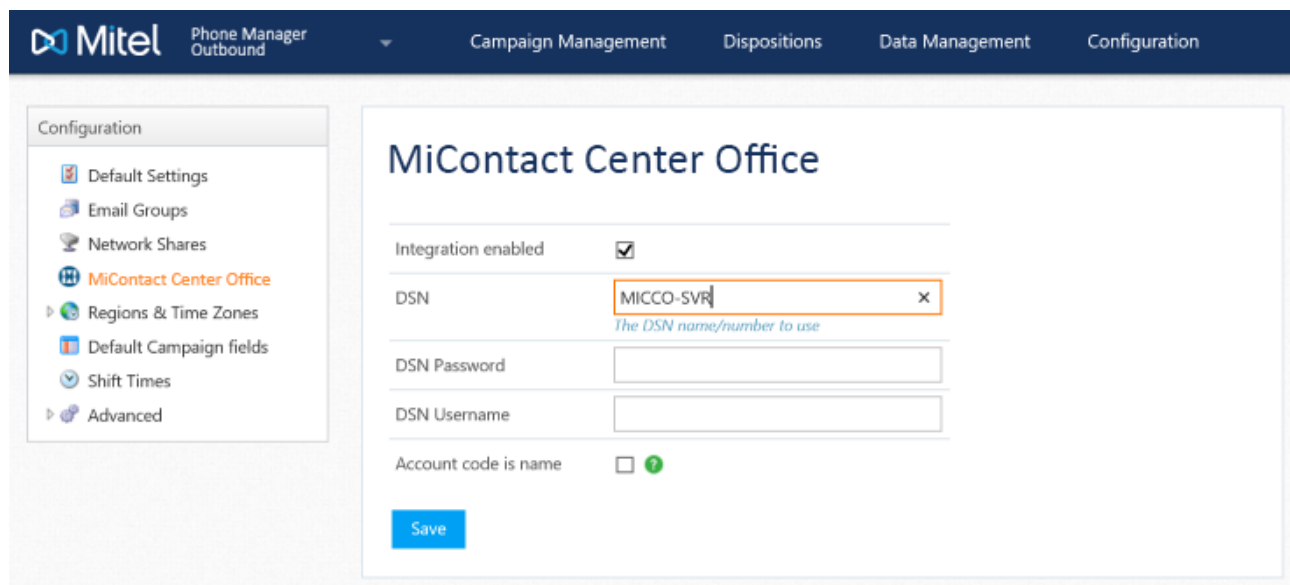
### Install x86 DB2 Drivers on the server running Phone Manager Outbound

On the server where Phone Manager Outbound is installed, browse to the 'MICCO\_DISKS\Client' share on the server running MiCC Office. Locate the 'IBM Data Server Driver Package (x86)' folder and run the setup file found using Administrative privileges.

### Phone Manager Outbound Configuration

Perform the following steps on the Phone Manager Outbound Server.

On the Phone Manager Outbound website browse to the 'Configuration - MiContact Center Office' section.



The screenshot shows the 'MiContact Center Office' configuration page in the Phone Manager Outbound interface. The page has a dark blue header with the Mitel logo and navigation tabs: Campaign Management, Dispositions, Data Management, and Configuration. On the left, a sidebar lists configuration options: Default Settings, Email Groups, Network Shares, MiContact Center Office (highlighted), Regions & Time Zones, Default Campaign fields, Shift Times, and Advanced. The main content area is titled 'MiContact Center Office' and contains the following fields:

- Integration enabled:** A checkbox that is checked.
- DSN:** A text box containing 'MICCO-SVR' with a small 'x' icon to the right. Below the box is the text 'The DSN name/number to use'.
- DSN Password:** An empty text box.
- DSN Username:** An empty text box.
- Account code is name:** A checkbox that is unchecked, with a green question mark icon to its right.
- Save:** A blue button at the bottom left.

In the DSN text box enter the hostname or IP Address of the server running MiCC Office. Leave the Username and Password boxes blank and save the changes.

### Integration Features

Once enabled, Phone Manager Outbound will update the MiCC Office with the following information after each call :

- Any Disposition code entered during Wrap Up will be added to the Account Code field in MiCC Office
- The Campaign Name will be entered into Field2 within MiCC Office overwriting any other data there.

If required, the account code number can be replaced with the Disposition Name. To enable this feature check the box labelled 'Account Code is name'.





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