Customer Journey Platform
Campaign Manager
User Guide

Notification

The Broadsoft CC-One solution has been renamed the Cisco Customer Journey Platform. Beginning in August 2018, you will begin to see the Cisco name and company logo, along with the new product name on the software, documentation and packaging. During this transition process, you may see both Broadsoft and Cisco brands and former product names. These products meet the same high standards and quality that both Broadsoft and Cisco are known for in the industry.

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About This Guide

This guide explains how to use the features available in the Cisco© Customer Journey Platform (CJP) Campaign Manager (CM), a powerful list and campaign manager that greatly enhances and accentuates the fundamental capabilities of CJP. CM manages upload, selection, and rescheduling of contacts in addition to providing important campaign management features.

Note: Throughout this guide are references to email and SMS, which are not supported in this release.

Who Should Read This Guide

This guide is intended for administrators and personnel who create and manage outbound campaigns and contact lists used in those campaigns.

How This Guide Is Organized

The chapters in this guide provide the following information:

Chapter 1, "Campaign Manager (CM)," provides an overview of the CM application and describes the components of the CM Console and the following widgets available on the Home page: Real-time Snapshots, Quick Links, Campaign-Specific Quick Links, and To-do List.

Chapter 2, "Campaign," describes how to create, configure, and manage campaigns.

Chapter 3, "Group," describes the Group page. In Campaign Manager, CJP outdial entry points are referred to as a campaign groups.

Chapter 4, "System," describes how to configure system-wide features for the CM application.

Chapter 5, "Contact Strategy," describes how to configure a set of rules for various modes. This set of rules decides the mode on which a contact is reached (usually based on the weight assigned to the mode), the time at which a contact is reached on a specific mode, the time when retries are dialed out on configured modes, etc.

Chapter 6, "Users," states that the settings on the Users page are not relevant in this release. Do not create users or perform any actions on the CM Users page. CJP users whose profiles provide access to Campaign Manager are automatically given access to all the CM capabilities.

Chapter 7, "License Reports," provides an overview of the License page.

Chapter 8, "Script Designer," describes how to use the Scripting tool to configure call guides for agents with predefined questions to be posed to a contact when a call is connected.

Chapter 9, "Teams," describes the Team Mapping page, which lists the CJP agent-based teams available for handling calls generated by a campaign. Teams are created in the CJP Provisioning module and are automatically displayed on the CM Team Mapping page., where you can see which campaigns are assigned to a team and can also assign teams to a Preview campaign.

1 Campaign Manager (CM)

Topics covered in this chapter:

- Overview
- Starting the CM Console
- Home Page

Overview

Campaign Manager (CM) is a powerful campaign management and list management tool. CM is designed with the functionality and features to increase right party contacts and meet campaign objectives in an outbound environment. By intelligently managing customer contacts as they move through the system, CM enables contact centers to reach the right people at the right number to best meet campaign objectives.

This is the application for the new-age contact center that aims at deep contact penetration with high success rates. The major advantages of the CM application are visible in almost every sphere of operation.

- **Campaign:** User-friendly UI makes campaign management easy and saves up to 50% of your time. Complete campaign elements in one place enables you to create a campaign and have it up and running in no time.

- **Modes**: Various ways you can reach the customer such as Home Phone, Work Phone, Cell Phone.

    Note: Channels other than Voice (Email, SIP, and other multimedia channels) are not supported in this release.

- **Real-time Reports:** The dashboard analyzes data in-depth and presents a bird's eye view of the Campaign Management performance in real time.

- **Contact Strategy:** A slew of configurable contact strategies ensure you never miss a contact—anywhere, anytime.

- **Contact Selection Strategy:** CSS schedule configuration made easier—choose between a single strategy for a contiguous block for the entire campaign day, or different schedules for as little as 15-minute intervals.

- **Scripting Tool:** Allows you to configure call guides (for Voice campaigns) for the agent.

- **Statutory Compliance:** The DNC, NDNC, and PEWC features make sure the laws of the land relating to contact dialing are always followed.

    Note: PEWC screening is not available in this release.

- **Section 508:** The application is compliant with provisions of Section 508, and enables ease of operation for special persons. See the VPAT document for compliance details.

- **FIPS:** This release is compliant to Windows Platform FIPS-validated cryptographic algorithms. It uses Rijndael algorithm for encryption. This provides enhanced security to all users and end customers of this application. Advanced Encryption Standard (AES) is a specification of encryption of data as established by the US National Institute of Standards and Technology.

Campaign Overview

Here is an overview of how a campaign is orchestrated:

- The contacts are uploaded into the CM database.

- CM creates contact files based on filters or system conditions.

- If the call is patched to an agent, business outcome is indicated by the agent.

- CM takes the agent stated outcome and applies the call strategy and reschedules (or closes) the contact.

- Based on the rate at which the contacts are dialed, CM supplies further contacts to Dialer.

CM Console

CM Console is an administrator module that you can use to perform the following tasks:

- Configure application parameters

- Manage campaigns

- Manage lists

- Manage users

- Maintain call strategies and business outcomes

- Create call guides for agents to use

Starting the CM Console

To launch the CM Console:

➤ Log in to the CJP Management Portal and on the landing page, click the **Campaign Manager** link on the navigation bar.

Your CM Console Home page will open in a separate tab. It might take several seconds for the page to appear.

Understanding the CM Console

Click any module to open the specific page. The CM Console module page is displayed as shown in the following illustration. The look and feel of all module pages are similar.
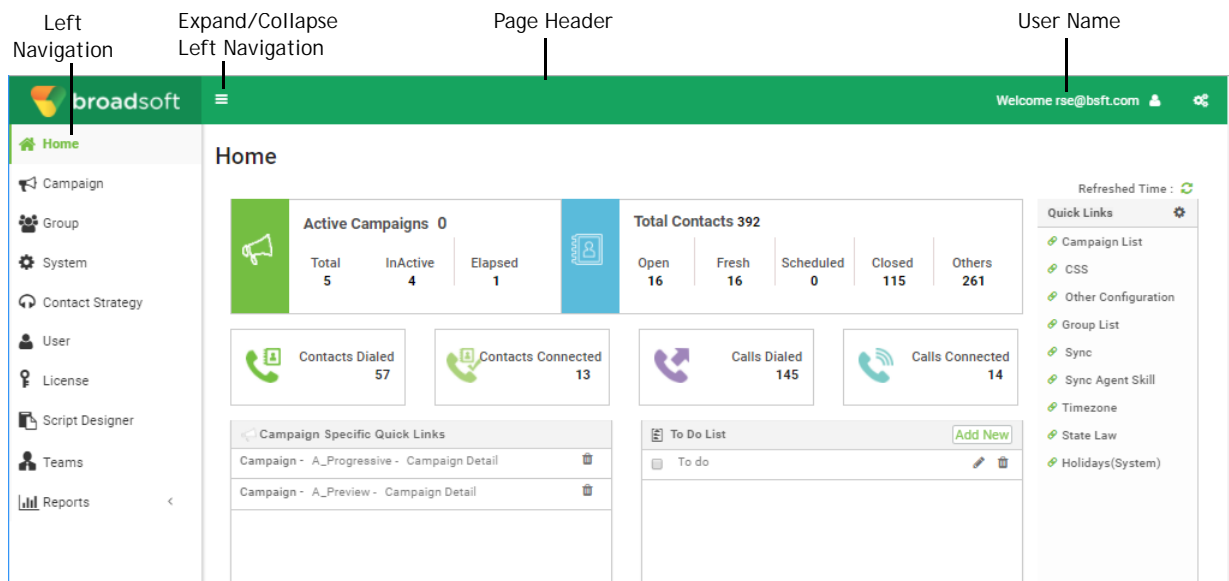
The components on the CM Console module page are explained below:

- **Page Header:** The page header contains the following:

  - **Expand/Collapse Left Navigation:** Use this to expand/collapse the left navigation pane—the main menu.

  - **User Name:** The logged-in user name.

- **Left navigation:** This is the main menu showing links to the various modules of the application.

- **Content Area:** The work area displaying the configurable fields as entry areas, drop-down lists, check boxes, etc., applicable to the menu item.

Home Page

The Home page, shown below, is the gateway to the CM application.
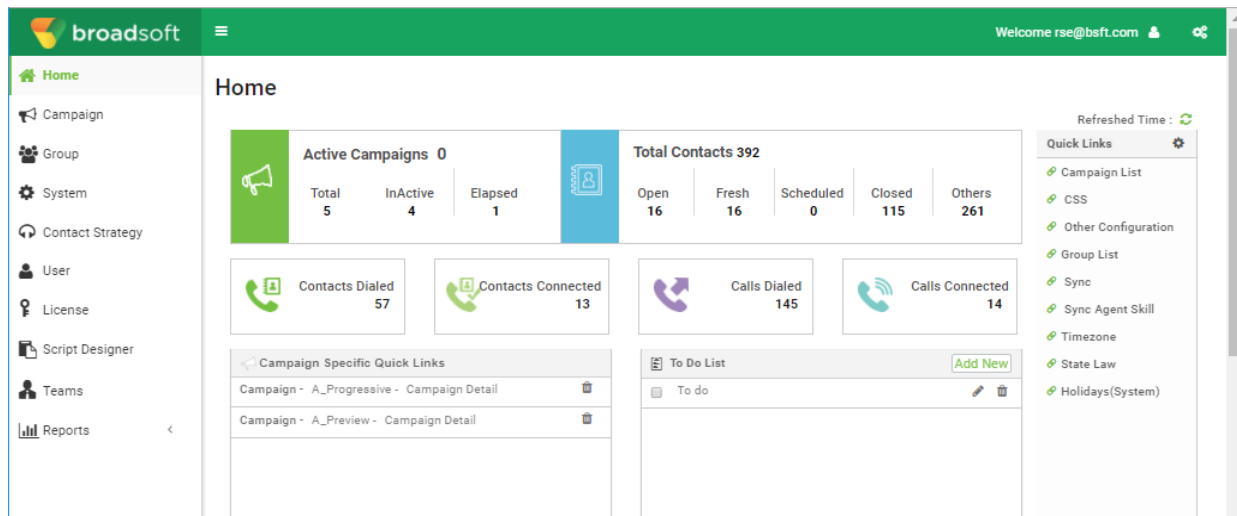
The Home page contains the widgets described in the following topics:

- Real-time Snapshots
- Quick Links
- Campaign-Specific Quick Links
- To-do List

Real-time Snapshots

This widget contains important snapshots that provide a live, high-level, 360-degree view of the CM application.
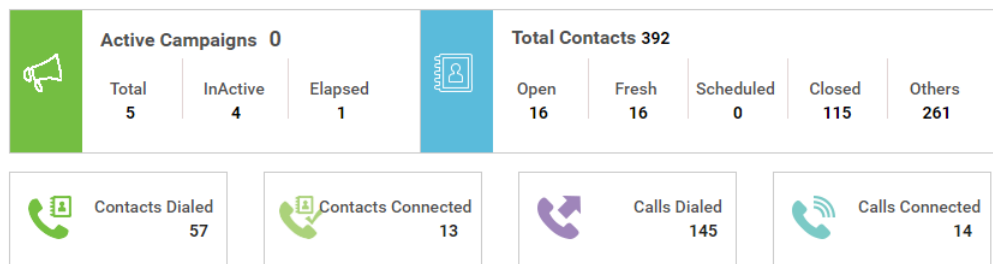
The following information is cumulative for the application from its installation and first use:

- **Active Campaigns** - This section displays the application-wide number of active campaigns. This also shows the number for campaigns in Total, Inactive, and Elapsed categories.

- **Total Contacts** - The total number of contacts uploaded to the application across all campaigns. This also shows a break up of Open, Fresh (yet to be dialed), Scheduled, Closed, and Other contacts.

The following information contains data only for the current day (server time zone/ UTC):

- **Contacts Dialed** - This shows the total contacts dialed across all campaigns.
- **Contacts Connected** - This shows the total contacts successfully connected.
- **Calls Dialed** - This shows the total calls dialed across all campaigns. This includes multiple dial outs for same contacts.
- **Calls Connected** - This shows the total calls connected between an agent and a customer across all campaigns. This includes multiple connects for same contacts.

Click the **Refresh** button on the top right of the Content Area to refresh data on the Home page.

Quick Links

This widget links you to various pages on the application, across all campaigns. This makes navigation to the desired page easier and faster—a single click from the Home page.
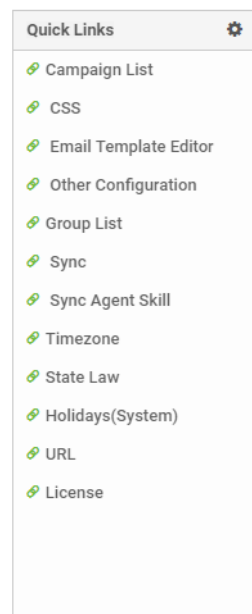
To add a new page to the **Quick Links** widget, follow the steps listed below.

1. Click the **Settings** button on the header line of the **Quick Links** widget to add a new quick link page. All pages that can be added as quick links to this widget are listed.
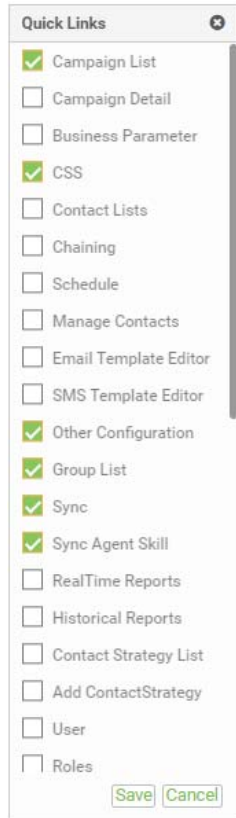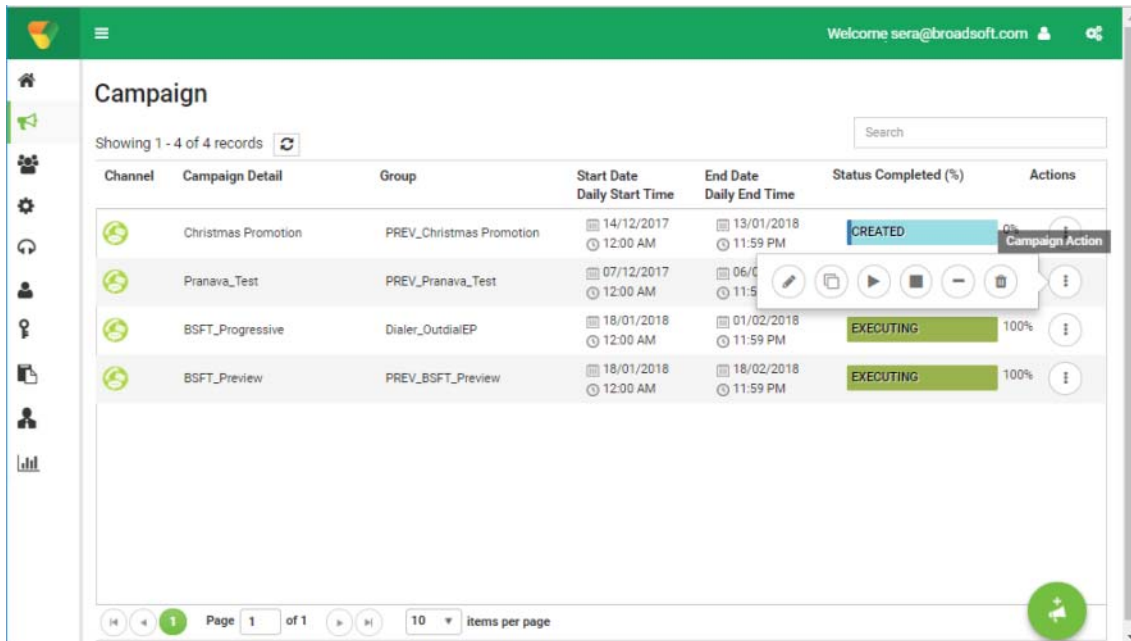
2. Select check boxes corresponding to the pages that you want listed in the **Quick Links** widget.

3. Click **Save**.

Campaign-Specific Quick Links

This widget links you to various pages relating to campaigns on the application. This makes navigation to the desired campaign-related page easier and faster—a single click from the Home page.

1. Navigate to the **Campaign** listing page shown below.

2. Click the Edit button on the **Action** bar of the **Campaign** for which you want a quick link.

3. The **Campaign Configuration** page opens.

4. Click the **Link** button (shown below) on the desired configuration item to place the quick link on the widget.

5. Click the **Delete** button to delete the quick link.

To-do List

The CM application provides an inbuilt to-do list, useful to track or manage activities to be handled by the CJP administrator. This widget acts as a versatile application-embedded diary. You can add tasks that need to be addressed in a to-do list.
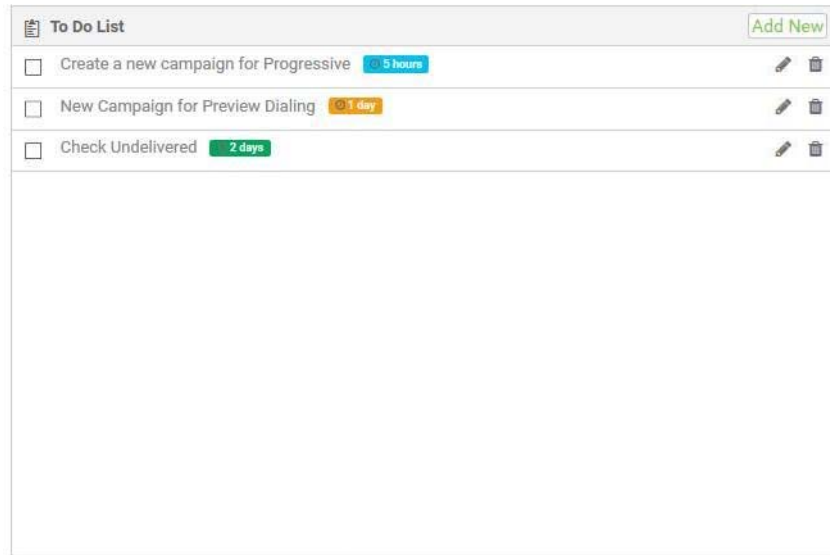
The **To Do List** widget shows the remaining days for the task to be completed and is color coded as below:
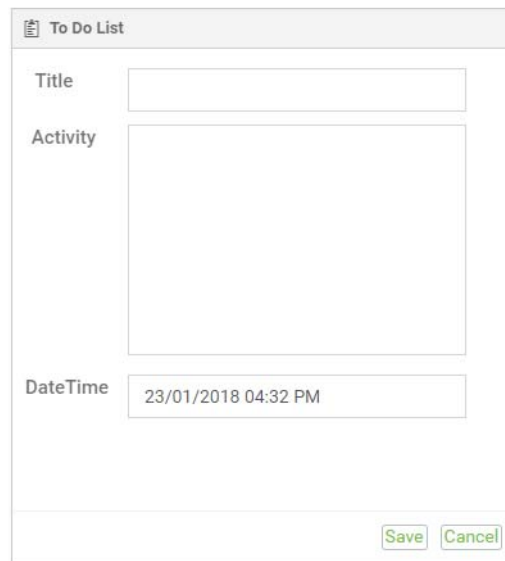
- **Green** when the remaining time to perform the task is in days
- **Orange** when the remaining time to perform the task is in hours
- **Blue** when the remaining time to perform the task is in minutes
- **Red** when the task is overdue

On completion, select the check box alongside the task to mark it as completed.

Adding a Task

1. Click **Add New** on the header line of the **To Do List** to add a new task.

2. Enter a **Title** for the task. For example, **Launch a Voice Campaign**.

3. Enter the **Activity** to be performed as part of the task. Activity related to the above item might be **Create Campaign for January Marketing launch**.

4. Enter a **DateTime** for completion of the task.

5. Click **Save**.

2 Campaign

Topics covered in this chapter:

Overview

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

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

- Manage campaigns
- Configure business parameters
- Configure contact selection strategies
- Configure campaign chaining
- Upload contacts
- List information
- Scrub contacts
- Manage contacts
- Configure campaign holidays
- Schedule a campaign

- Re-assign agents to a campaign
- Configure server scripts
- Build expressions for a contact selection strategy
- Create categories based on outcomes and set targets

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

Before You Start

As a prerequisite to creating a campaign, make sure that CJP entry points, queues, and routing strategies to associate with your campaign have been created (see the *Cisco Customer Journey Platform–Management Portal User Guide* for details).

- After creating an outdial entry point in CJP, you must enable it on the CM Group page to make it available for selection when you create a Progressive campaign See Chapter 3, "Group," beginning on page 57 for more details.

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

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

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

- **Mode** - The various methods you can use to reach a customer. Examples of modes are Home Phone, Work Phone, Mobile (Voice). See "Modes" on page 63 for more details.

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

- **Contact Strategy** - Contact Strategy is about configuring a set of rules for various modes. This set of rules decides the mode on which a contact is reached (usually based on the weight assigned to the mode), the time at which a contact is reached on a specific mode, the time when retries are dialed out on configured modes, etc. See Chapter 5, "Contact Strategy," beginning on page 89 for more details.

- **Time Zone** - The list of time zones configured for the outbound campaign. This is relevant for campaign execution and also dialing out contacts in their respective time zone. See "Time Zones" on page 64 for more details.

Getting Started

Click **Campaign** in the menu pane on the left. The **Campaign** Home page opens as shown below.

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

- **Channel** like Voice, Email, SMS, or a combination of voice and non-voice
- **Campaign** name
- **Group** that the campaign belongs to
- **Start Date** - Daily Start Time
- **End Date** - Daily End Time
- **Status** and **Completed**:
  - **Created** - Immediately after a campaign is created and yet to start dialing contacts.
  - **Executing** - Campaign in a running state, that is, dialing contacts.
  - **Stopped** - A campaign is not running.
  - **Completed** - The percentage of contacts dialed out (from the total number of contacts uploaded).
- **Action** to be taken, if any, from the following:
  - **Stop** (or **start**) the campaign.
  - **Copy** creates a new campaign with all properties of the selected campaign (except Campaign Name) retained as is.

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

Note: In-progress contacts are not flushed.

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

– **Delete** a campaign.

Creating a Campaign

To create a new Campaign:

1. Click the **Floating Action Button (FAB)**, shown below to create a new campaign. This button is located at the bottom right corner of the page.

2. Create a campaign by completing four wizards.

Campaign Detail   Campaign Group   Contact Strategy   Configuration Options
       1   ✔   3   4

Campaign Detail

1. The **Campaign Detail** screen opens.

2. Enter a **Campaign Name**.

3. Enter a **Description**.

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

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

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

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

8. Select a **Time Zone** for this campaign.

Note: If you do not have a time zone that applies to this campaign, create a new Time Zone Group by clicking the **Add** button. See "Time Zones" on page 64.

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

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

Campaign Group

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

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

   Note: Skip to step 5 if you selected **Shared List**.

3. Select a **Pacing Mode**.

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

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

4. Do one of the following:

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

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

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

Contact Strategy

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

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

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

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

   Note: If you do not have a **Contact Strategy** that applies to this contact, create a new strategy by clicking the **Create Contact Strategy** button. See "Creating a Contact Strategy" on page 90.

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

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

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

5. If your Contact Strategy is a Simple Strategy:

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

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

   c. Skip to step 11.

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

   Note: The contact is closed even if Global Retry setting allows more dialing attempts.

7. Skip to step 11 if you do not want to configure a **Transition Window**.

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

Transition Window offers the ability to constrain/limit the number of attempts for each mode across a defined duration threshold. See "Transition Window" on page 91 for more details.

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

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

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

    Note: If you do not have a Callback Strategy that applies to this contact, create a new strategy by clicking the **Create Callback Strategy** button. See "Creating a Contact Strategy" on page 90.

12. Select the **PCB to NCB reset**.

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

   Available reset options:

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

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

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

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

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

Configuration Options

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

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

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

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

Campaign chaining allows you to re-allocate closed contacts from one campaign to another, based on your business requirements. Campaign chaining can happen either on business outcome or on telephony outcome. This chaining is based on how you have configured the chaining rules. See "Chaining" on page 34.

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

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

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

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

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

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

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

A **pre-call** script ascertains from an external database whether a customer should be called or ignored before calling a customer. See "Server Scripts" on page 54. Choose from the following options:

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

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

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

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

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

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

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

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

Various geographical regions like states, countries, etc. have laws that regulate contact center operations. These laws can be configured at the application level and chosen as applicable to campaigns. See "State Law" on page 74.

Select any one of the three options:

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

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

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

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

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

Configuring the Campaign

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

1. Business Parameter
2. Contact Selection Strategy
3. Chaining
4. Contact Lists
5. Manage Contacts
6. Schedule
7. Scrub
8. Other Configurations

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

Business Parameter

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

- Associate this data to contacts at the time of upload.

- Define custom conditions for CSS to define a dialing strategy.

- Query these parameters and manage contacts based on query results.

- Populate these parameters on agent desktop as screen pop during a call.

You can create a total of 25 business parameters.
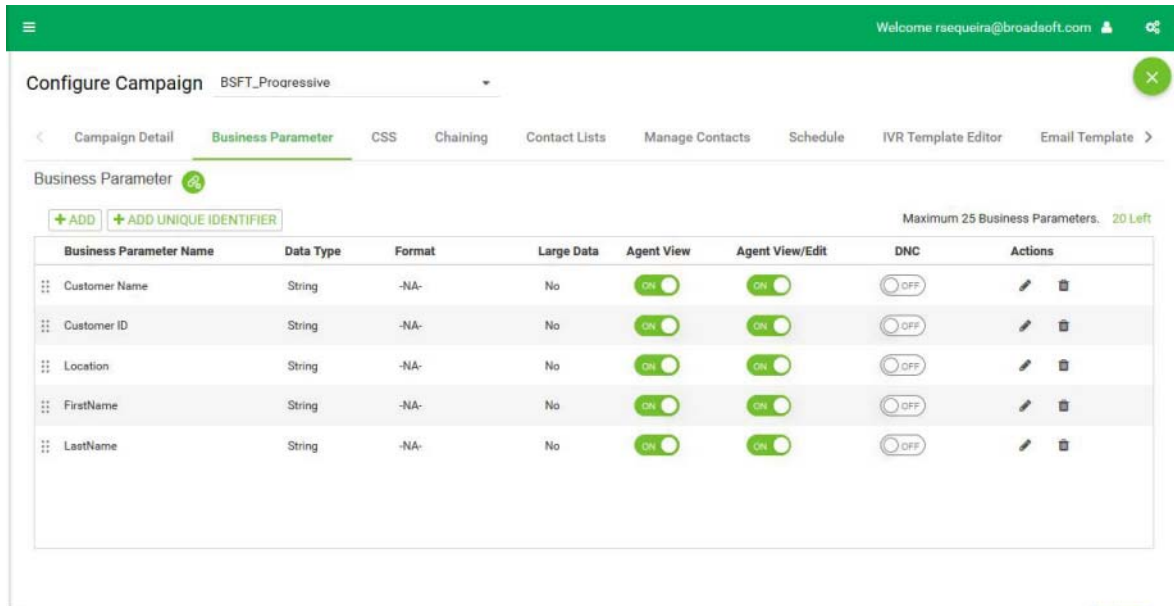
You can also create a unique identifier. Ideally, there may be identical business fields across campaigns that may be required to be grouped for various purposes. For example, Customer ID can be a business field across campaigns for which grouping is necessary in reports. However, Customer ID can be the first business field in Campaign A; sixth in Campaign B; and tenth in Campaign C. If you create this business field as a Unique Identifier field, it is possible to group data from these fields. Follow the steps listed below to create a Unique Identifier.

Click the **Add Unique Identifier** button to add a unique identifier. Complete the following fields:

1. Enter a **Unique Identifier**.

2. Click **Save**.

Creating a Business Parameter

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

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

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

   • **Number**, for numeric data.

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

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

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

3. Select a **Dimension** from the drop-down list, if available. Dimensions help build customized reports based on business fields. See "Dimension" on page 84.

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

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

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

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

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

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

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

9. Using the **Reorder** button (shown below) you can reorder the business fields.

Contact Selection Strategy

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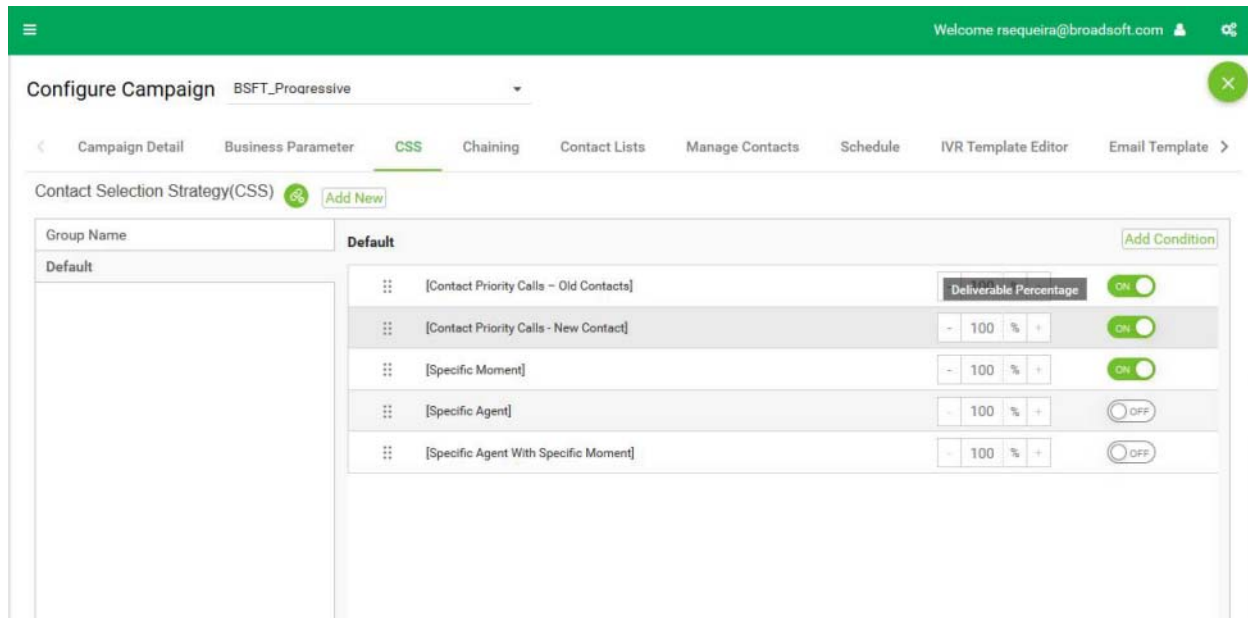
Default CSS Conditions

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

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

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

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

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

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

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

Creating a CSS Condition

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

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

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

   Note:

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

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

3. The Advanced Builder screen is shown below.

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

   | | Select a Field | Select an Option | ▾ | Enter a Value | | ⊕ |
   | ▾ | Select a Field | Select an Option | ▾ | Enter a Value | | ⊕ ⊖ |

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

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

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

6. Select a compare option—this is the condition that the field should satisfy for a contact to be selected. Some comparison parameters for your condition could be > (greater than), < (lesser than), = (equals), etc.

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

8. Close the bracket.

9. Click the **Add** button to add another condition.

10. Complete **Steps 4** through **8**. Add as many conditions as you require for your CSS.

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

12. If you are not using the Advanced Builder, use the simple builder as shown in the screen below:

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

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

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

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

16. Close the bracket.

17. Click the **Add** button to add another condition.

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

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

20. If you want to add more groups, select the **Add** button from the **Group Action** buttons shown below.

21. Repeat **Steps 12** through **17**.

22. Navigate to the **Order By** section decide the order in which you want the contacts to be delivered to the Dialer—ascending or descending. The **Order By** screen section is shown below:

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

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

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

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

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

Chaining

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

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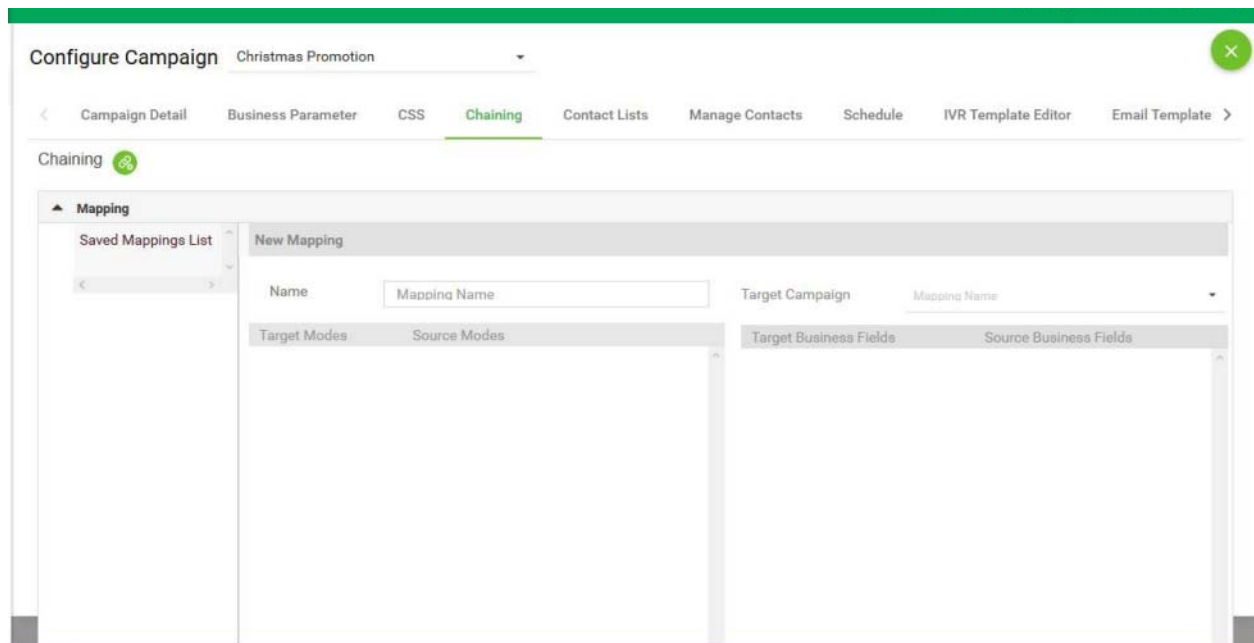
Mapping

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

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

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

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

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

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

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

Outcomes

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

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

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

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

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

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

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

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

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

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

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

Contact Lists

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

1. Click the **Floating Action Button (FAB)** as shown below.

2. Click **Upload Contacts FAB** (shown below) to upload contacts.

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

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

4. Complete the following:

   a. Click the **Choose File** button and choose a file that contains the contacts for upload.

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

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

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

Profiles can be used as shortcuts to work with contact-related uploads. Using these saved profiles, you can upload (including Global Upload), scrub, or upload DNC/NDNC/PEWC (compliance) contacts without having to go through the entire process of setting parameters and conditions. In other words, each Profile is an auto uploader. See "Profile" on page 78.

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

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

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

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

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

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

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

      Note: A configuration file setting controls permission to this feature.

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

   Note:

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

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

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

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

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

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

7. Proceed to **Mode Mapping**.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

      Note: The application first looks for duplicates in the local file or database table that is ready for upload and, from such records, keeps the first record for upload. Once done, from records already uploaded for this campaign, the application scans all open contacts using the same filters. If any open contact

matches the record in the upload file, such record is NOT uploaded. The records not uploaded are shown in the error table with the remark DUPLICATE.

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

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

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

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

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

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

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

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

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

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

Manage Contacts

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

- **Search Contacts**: Search contacts for a given set of conditions.
- **Reschedule/Reset Contacts**: Reschedule or reset the following contacts populated for a given set of conditions:
  - **Callback Expired Contacts** are contacts where the valid time to callback has expired.
  - **Blocked Contacts** are those that are blocked from being delivered to the Dialer.
  - **Closed Contacts** are those closed for some reason.

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

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

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

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

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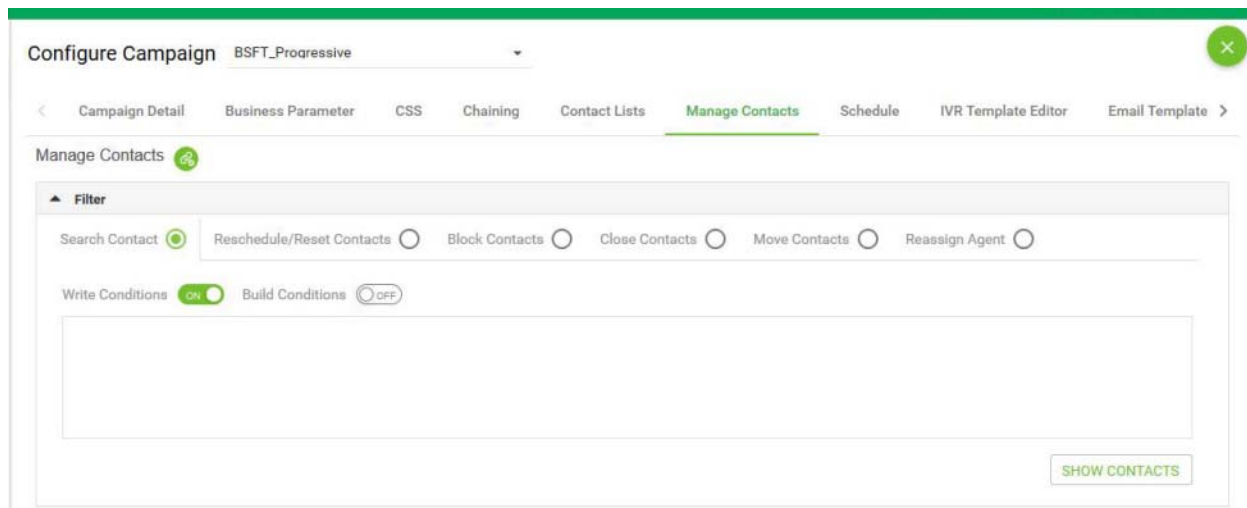
Condition Builder

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

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

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

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

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

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

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

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

5. The **Advanced Builder** screen is shown below.

| | | Select a Field | Select an Option | ▼ | Enter a Value | | ⊕ |
| ▼ | | Select a Field | Select an Option | ▼ | Enter a Value | | ⊕ ⊖ |

Note: Skip to **Step 13** if you are using the simple condition builder.

6. Enter an open bracket in the first cell.

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

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

8. Select a compare option—this is the condition that the field should satisfy for a contact to be selected. Some comparison parameters for your condition could be > (greater than), < (lesser than), = (equals), etc.

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

10. Close the bracket.

11. Click the **Add** button to add another condition.

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

13. If you are not using the Advanced Builder, use the **Simple Builder** as shown in the screen below:

⊕ ⊖

| | | Select a Field | Select an Option | ▼ | Enter a Value | ⊕ |
| | ▼ | Select a Field | Select an Option | ▼ | Enter a Value | ⊕ ⊖ |

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

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

15. Select a compare option—this is the condition that the field should satisfy for a contact to be selected. Some comparison parameters for your condition could be > (greater than), < (lesser than), = (equals), etc.

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

17. Click the **Add** button to add another condition.

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

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

20. If you want to add more groups, select the **Add** button from the **Group Action** buttons shown below.

    ⊕ ⊖

21. Repeat **Steps 14** through **21**.

22. Proceed to the **Order By** section decide the order in which you want the contacts to be delivered to the Dialer—ascending or descending.

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

24. From the **Sort** drop-down list select, **As** or **Desc** for Ascending or Descending sort, respectively.

25. Click the **Add** button to add more sort orders.

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

Search Contacts

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

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

2. Complete the Condition Builder (see page 40).

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

Reschedule/Reset Contacts

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

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

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

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

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

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

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

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

4. Complete the Condition Builder (see page 40).

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

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

   For each contact, or

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

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

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

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

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

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

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

Block Contacts

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

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

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

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

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

4. Complete the Condition Builder (see page 40).

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

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

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

   For each contact, or

   - **Select All** to select all the contacts on the current page, or
   - **Global Select** to select all populated contacts across all pages.

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

Close Contacts

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

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

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

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

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

4. Complete the Condition Builder (see page 40).

5. Select the **Fresh Contacts** check box to directly fetch **Fresh Contacts** without having to write conditions to fetch contacts. To populate **Blocked Contacts** and **Delivered Contacts** and that meet the filter conditions, select the respective check boxes, as required, too.

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

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

   For each contact, or

   - **Select All** to select all the contacts on the current page, or
   - **Global Select** to select all populated contacts across all pages.

8. Click **Apply** to close the selected contacts.

Move Contacts

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

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

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

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

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

4. Complete the Condition Builder (see page 40).

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

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

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

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

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

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

    For each contact, or

    - **Select All** to select all the contacts on the current page, or
    - **Global Select** to select all populated contacts across all pages.

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

Re-assign Agents

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

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

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

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

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

4. Complete the Condition Builder (see page 40).

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

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

   For each contact, or

   - **Select All** to select all the contacts on the current page, or
   - **Global Select** to select all populated contacts across all pages.

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

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

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

Scrub

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

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

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

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

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

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

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

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

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

Profiles can be used shortcuts to work with contact-related uploads. Using these saved profiles, you can upload (including Global Upload), scrub, or upload DNC/NDNC/PEWC (compliance) contacts without having to go through the entire process of setting parameters and conditions. In other words, each Profile is an auto uploader. See "Profile" on page 78.

4. Complete the Condition Builder (see page 40).

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

Schedule

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

- **CSS Schedule**: A contact selection strategy (CSS) schedule defines the CSS to be used by the application to push contacts to the Dialer. You can define these CSS schedules for blocks of time for each day of the week. For configuring CSS to be used here, see "Contact Selection Strategy" on page 31.

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

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

  Note: Only Advance Contact Strategies are available for selection.

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

  Note: Holidays are added in the **System** menu. This section only allows you to select from the added Holidays. See "Holidays" on page 76.

CSS Schedule

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

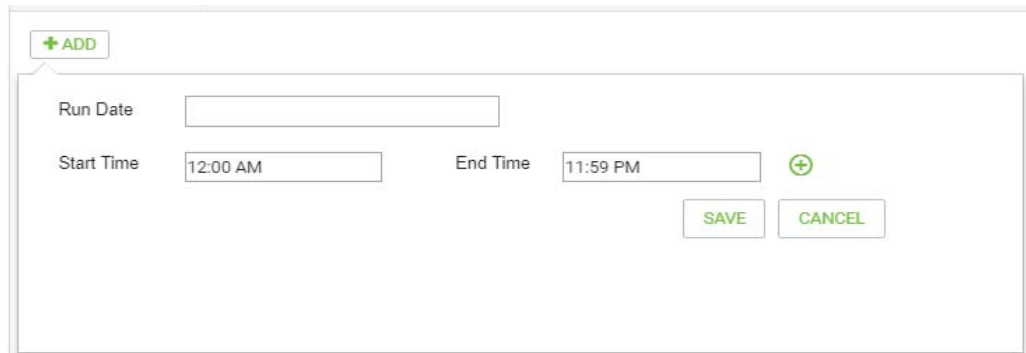There are many ways you can add a CSS Schedule. They are:

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

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

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

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

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

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

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

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

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

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

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

Runtime Scheduling

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

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

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

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

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

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

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

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

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

Contact Mode Scheduling

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

Follow the steps listed below to configure **Contact Mode Scheduling**:

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

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

   Note: Only Advance Contact Strategies are available for selection.

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

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

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

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

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

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

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

Holiday

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

1. The holidays available for selection are displayed.

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

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

Other Configurations

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

- Expression Builder
- Target
- Server Scripts

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

Expression Builder

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

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

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

3. Enter an **Expression Name**.

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

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

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

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

Target

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

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

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

3. Enter a **Description**.

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

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

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

Server Scripts

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

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

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

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

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

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

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

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

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

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

Campaign Actions

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

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

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

- Click **Edit** to edit a campaign.

- Click **Copy** to copy a campaign.

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

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

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

- Click **Flush** to flush a campaign of contacts.

- Click **Delete** to delete a campaign. Ensure no contacts are pending delivery before deleting a campaign.
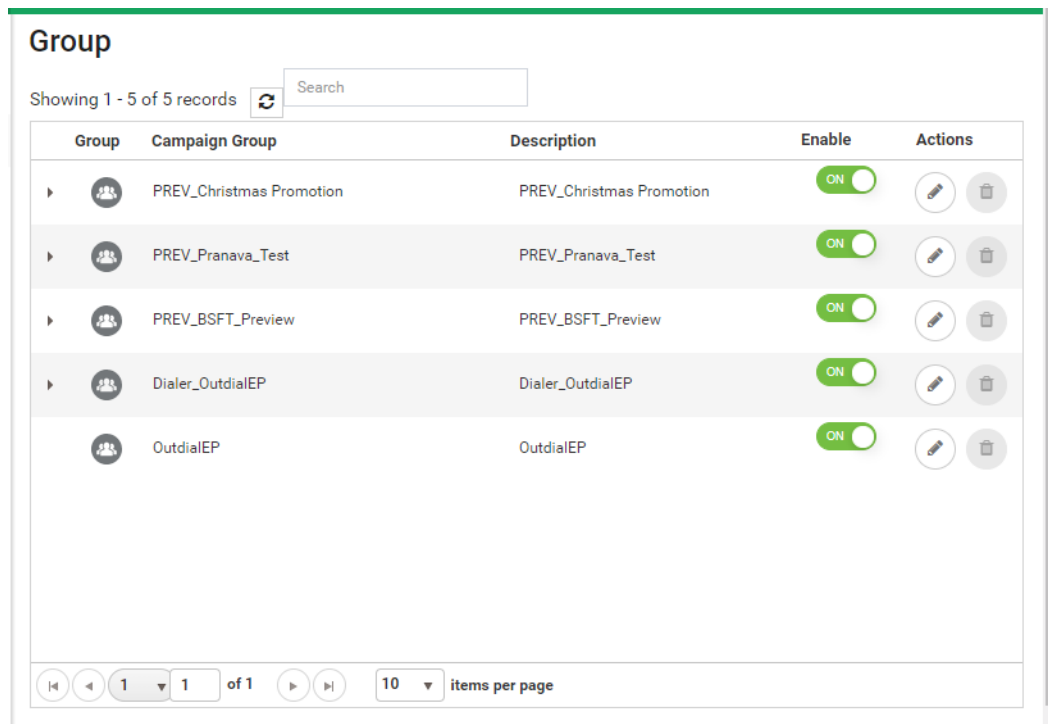
3 Group

In CM, all CJP outdial entry points are mapped to groups after they are created. To make an entry point available for selection when you create a Progressive campaign, you must enable it on the CM Group page.

When you create a Preview campaign, a campaign-specific group is automatically created in CM with the prefix "PREV_" followed by the campaign name.

Entry points can be dedicated to a campaign. Alternatively, shared campaign groups can be created and assigned to multiple entry points. Shared campaign groups are automatically created when you create a shared campaign.

Click **Group** in the menu pane on the left to open the **Group** page.

The grid shown in the above illustration contains the **Campaign Group** name, **Description**, **Enable**, and **Actions**.

Turning the **Enable** switch **OFF** stops contacts from being delivered to the Dialer for all CM campaigns in that campaign group.

Using the **Expand** button on the left of the grid, you can expand the group to see the campaigns belonging to this Campaign Group as shown below.


The campaigns are listed along with the **Deliverable Percentage** for each. Deliverable Percentage is the percentage of contacts that are to be delivered to the campaigns. This helps you control which campaign gets priority for dialing out contacts. You could set the deliverable percentage as 75 percent for one campaign and 25 percent for another. The campaign that has 75 percent deliverable gets more contacts to be dialed.

However, where two campaigns are designated as 100 percent deliverable, the first campaign listed gets its contacts delivered for dialing. Only after the first campaign has exhausted all its contacts, does the second campaign get contacts to dial. To change this, you can drag and drop the campaigns and re-order them.

To change the **Deliverable Percentage**, click the **Edit** button under the **Action** column and change the Deliverable Percentage. Click **Save** in the **Action** column to complete the change.

Configuring a Campaign Group

1. Click **Edit** in the **Action** column for the listed campaign group you want to configure.

2. In the Contact Parameters section, specify the following information:

   - **Initial Number of Contacts** is the number of contacts you intend sending to the Dialer initially. Use the slider to set a number.

   - **Increment By %** is the percentage by which you intend increasing the contact delivery to the Dialer. You might want to increase this because the Dialer is dialing out calls at a rate faster than expected and is running out of contacts.

   - **Decrement By %** is the percentage by which you intend decreasing the contact delivery to the Dialer. You might want to decrease this because the Dialer is dialing out calls at a rate slower than expected and is accumulating contacts to be dialed out.

   - **Upper Threshold %** is the upper limit as a multiple of **Initial Number of Contacts** that can be delivered to the Dialer.
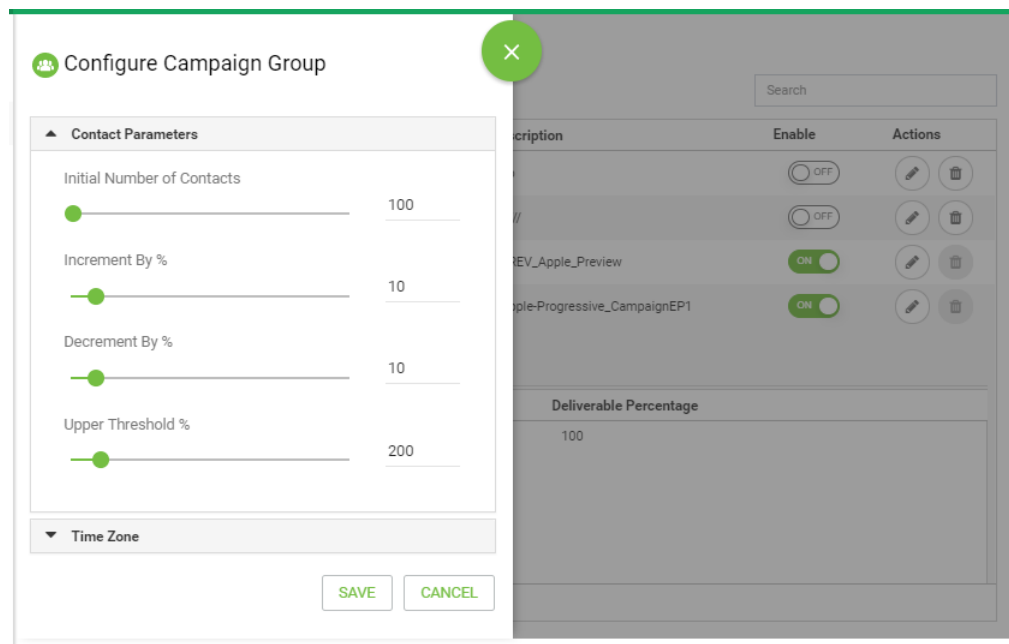
3. In the **Time Zone** section, select a check box for each time zone you require for this campaign group.

   All the time zones selected in the application are displayed in this section (see "Time Zones" on page 64).

4. For each selected time zone, select a **Start Time** and **End Time** from the drop-
down lists.

5. Click **Save**.

4 System

The **System** module helps you configure system-wide features for the CM application. Using this module, you can accomplish the following tasks:

- Create Modes that can be used to reach out to contacts

- Apply Time Zones to your application

- Configure Compliance rules to mark contacts as DNC, NDNC, and PEWC

- Configure Business Outcome settings based on wrap-up codes entered by agents

- Add **Area** and **Zip Codes** (Area/Zip Code) to the application

- Configure State Law to ensure you are compliant with local statutory requirements

- Add Holidays to the application—use these later to map to campaigns

- Create **Profiles** (Profile) to avoid repetitive configuration and mapping for contact uploads

- Configure Other Settings as listed below:

  - Set up an **Attempt Counter** to keep count of retries for Telephony Outcomes

  - Create **Dimensions** using various parameters to custom build reports

  - Define how you **Split** your contact into an **Area Code** and a phone number

  - Configure an **Alerter** service to keep specific system administrators alerted of glitches in any CM component or service
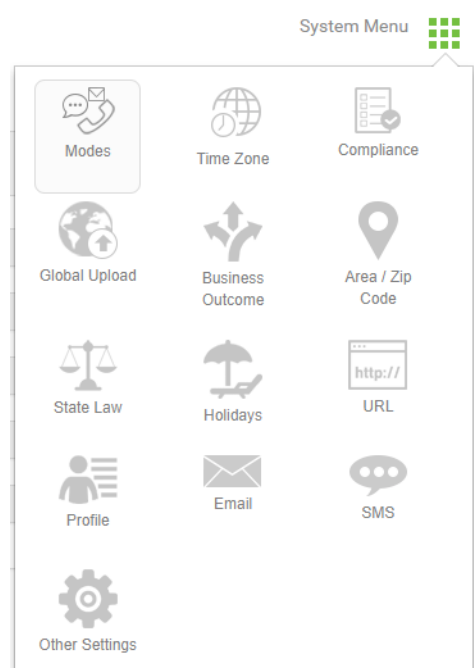
Click **System** in the menu pane on the left to open the **System Configuration** page as shown below.
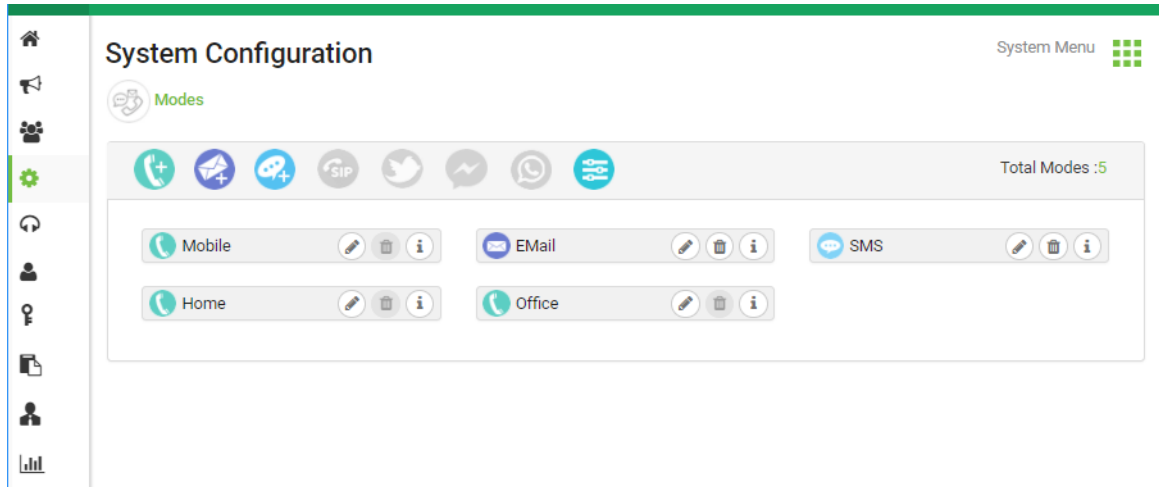
Click the **System Menu** button (shown below) to see all configuration items on the **System** menu.

The **System Menu** configuration items are shown below.

Modes

Modes are the various methods you can use to reach a customer. Examples of modes are Home Phone, Work Phone, Mobile (Voice), SMS, Email, Social Media (WhatsApp, Twitter, Facebook, etc.), and SIP. CM presently supports only Voice.

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

The first thing that you need to do configuring your CM application is to create Modes. Every contact that you upload always belongs to one mode or another, hence creating modes not just important, but mandatory. Modes are also used widely in CM to configure Call Strategies, Chaining contacts from one campaign to another, meet statutory requirements like DNC, NDNC, PEWC, Calling Window, etc.

The following modes are shown in the **Modes** screen for creation.
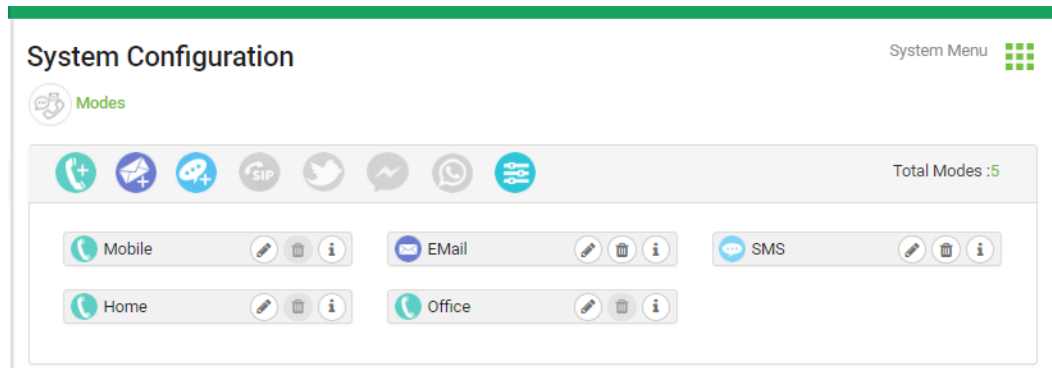
> **Note:** Only Voice modes are supported in this release.

The total number of modes on your CM application is also displayed on the right corner of the strip above.

Voice

This section deals with creating a **Voice Mode**. A voice mode can be created to reach a contact on a Fixed Line (Home or Office or Other) or a Mobile (Home or Office or Other). Follow the steps below to create a **Voice Mode**.

1. Click the **Voice Mode** button (shown below).

2. The **Add Voice Mode** pop up opens.

3. Enter a **Mode Name**.

4. Enter a **Description** for the mode.

5. From the number panels, select a **Minimum Length** and a **Maximum Length** for the mode.

6. Click **Save**.

Time Zones

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

Add system-wide time zones from the **System** menu.

> **Note:** Only time zones added here can be used as campaign-specific time zones.

You can add time zones using either the **Grid View** or the **Map View**.

Grid View

Follow the steps listed below to add **Time Zones** using the **Grid View**:

1. Click the **Time Zone** button (shown below) from the **System Menu** to add **Time Zones**.

   Time Zone

2. The **Grid View** opens with the listing of all time zones, at 10 time zones per page. Use the navigation controls to make changes to the number of items listed per page.

3. You can also use the **Search** box to search for time zones.

4. Against the required time zone, turn the **Enable** switch **ON** to select as an applicable time zone for the application.

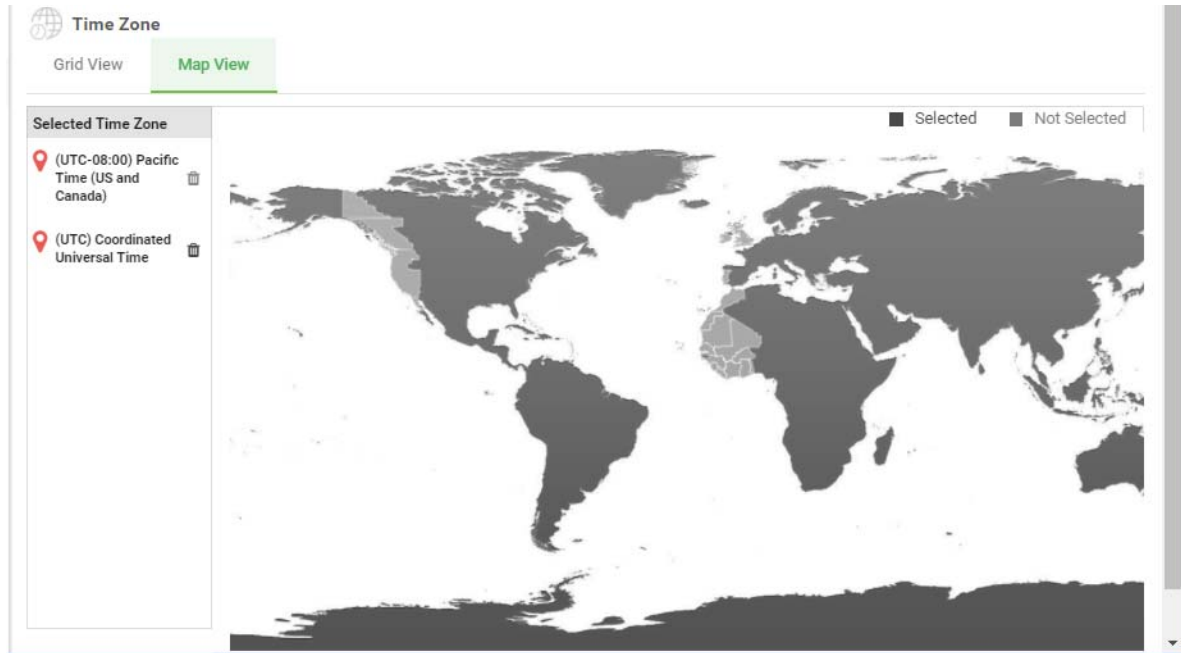5. Repeat **Step 4** for as many time zones as required.

Map View

Follow the steps listed below to add **Time Zones** using the **Grid View**.

1. Click the **Time Zone** icon (shown below) from the **System Menu** to add **Time Zones**.

2. The **Grid View** opens with the listing of all time zones.

3. Click the **Map View** button to see the time zones in a **Map View**.

4. Click an area in the map. A pop up displaying all time zones for the selected longitude appears.

5. Select the required check box and click **OK** to confirm selection.

6. Repeat Steps 4 and 5 for as many time zones as required.

Compliance

Compliance deals with the three aspects of statutory compliances detailed below:

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

- **National Do Not Call (NDNC)**: This is DNC registry at the national level. If a number is registered under NDNC, no person or organization (in the country in which the number is registered as such) shall make an unsolicited call or send an unsolicited SMS.

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

Follow the steps listed below to configure **Compliance** requirements.

1. Click the **Compliance** icon (shown below).

2. The **Compliance** screen opens as shown below.

3. Select an **Upload Type**. This determines the kind of compliance contacts—DNC, NDNC, or PEWC—that are being uploaded.

4. Select an **Import Mode** from the following:
    - **Append**: This appends the uploaded records to an already existing DNC/NDNC/PEWC list.
    - **Overwrite**: This clears the existing list and *appends* new records to the list.
    - **Delete**: Records in the DNC/NDNC/PEWC list matching those being uploaded are deleted.

5. Select a **Delimiter** that you have used in your upload file to separate data fields.

   Note: Use any one of the following delimiters in your upload file: comma (**,**), dash (**-**), dollar (**$**), percent (**%**), pipe (**|**), circumflex or caret (**^**), ampersand (**&**), asterisk (*****), and tab.

6. If you have a **Profile** that you wish to associate to this upload, select from the drop-down list.

A Profile is a sort of an auto uploader. All the configuration that governs your upload is saved into a named profile—File/Database upload, access credentials, business field mapping, etc.—virtually everything associated with an upload. All you have to do is select the file path, select a profile, and upload. See "Profile" on page 78 for more information.

7. Navigate to the **Field Mapping** section by expanding it.

8. The fields in the upload file are displayed in the drop-down lists. Map the fields to:

    - **Country Code** - The business field in the upload file to be mapped as country code.

    - **DNC Data** or **NDNC Data** (field label is based the selected Upload Type) - The field to be mapped as filter for DNC or NDNC data.

    - **Area Code** - The business field to be mapped as Area Code.

    - **Channel Type** - The Channel on which this DNC or NDNC upload applies: Voice, Email, or SMS.

9. If the contacts uploaded through this file are to be treated as DNC forever, select the **DNC Forever** check box in the **Valid Duration** section. This field appears only if the Upload Type is DNC.

10. If **DNC Forever** is not required, select a **Start Date** and **Stop Date** from the respective Date and Time Panels. The DNC is valid for the selected period.

11. Complete the **Campaign Specific Compliance** section next.

12. If the contacts uploaded are to be treated as DNC/NDNC/PEWC for specific campaigns, select the **Campaign Specific** check box.

13. Select the check boxes corresponding to campaigns to which this upload is applicable.

14. Click Upload.

Global Upload

The Global Upload feature is not available in this release.

Business Outcome

A business outcome is the disposition set by an agent based on the wrap-up code the agent entered after interacting with a customer. By configuring a business outcome, you can define what happens to the contact after the agent selects a wrap-up code.

For example, a credit card holder may confirm that he is paying the balance. The wrap-up code selected by the agent could be Confirmed To Pay. In this case, you can set the business outcome as Success. You can configure the business outcome to close the contact if it is a success. Conversely, if the credit card holder declines to pay, the wrap-up code could be Declined To Pay, and you can set the business outcome as Failure. Again, you can configure the business outcome to reschedule the contact again at a later date.

Configuring Business Outcomes

By default, the wrap-up codes defined in the CJP Provisioning module are added in CM as business outcomes.

1. Click the **Business Outcome** icon (shown below).

2. The **Business Outcome** screen opens.

3. Click **Edit** in the **Actions** column and click the **Next** button on the first two wizard screens (**Business Outcome Group** and **Parent Outcomes Group**) to navigate to the **Outcomes** wizard.
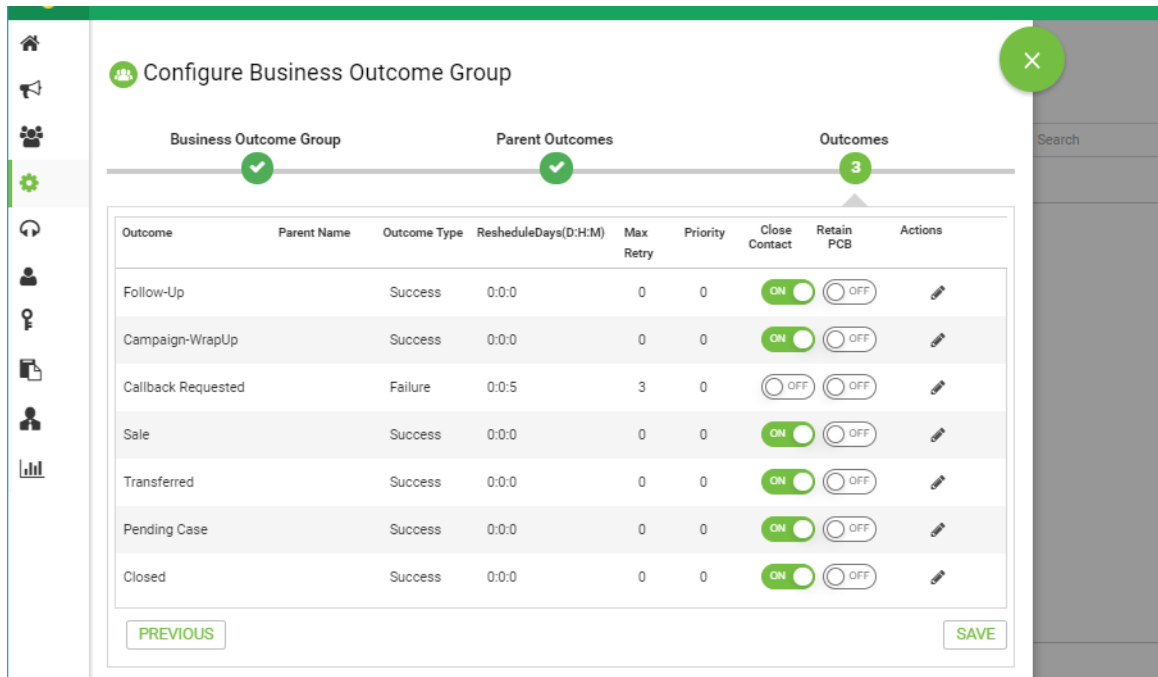
4. In the **Outcomes** wizard, click **Edit** in the **Actions** column corresponding to the outcome (wrap-up code) you want to configure.

5. Select the **Outcome Type—Failure** or **Success**.

6. From the number panel, select the **Days** by which a contact is to be rescheduled for this outcome.

7. From the number panel, select the **Hours** by which a contact is to be rescheduled for this outcome.

8. From the number panel, select the **Minutes** by which a contact is to be rescheduled for this outcome.

    Note: For example, if a call is wrapped up with this outcome at 4.30 pm on Monday, and is to be rescheduled for 4.30 pm on Tuesday, select 1 Day, 1 Hour, and 0 Minutes.

9. Select a number for **Max Retries**—the maximum number of retries allowed for this outcome.

10. Select a number for the **Priority** adjustment for this outcome. Adjust this number appropriately to deliver this contact on a higher priority.

11. Turn the **Close Contact** switch **ON** if you want to close the contact for this outcome.

12. Turn the **Retain PCB** switch **ON** to retain the Personal Callback to the same agent, if applicable.

13. Click **Save** in the **Actions** column to save the changes to the selected **Outcome**.

14. Click **Save** on the lower right side of the screen save your changes.

Viewing Outcome Settings

To quickly view the outcome settings for each wrap-up code:

1. Open the **Business Outcome** screen.

2. Click the down-arrow in the **Outcomes** column to display a pop-up showing **Outcome** column (listing the wrap-up codes), a **Type** column (displaying "Success" or "Failure") and the **Reschedule Time (DHM)** if one has been specified.

Area/Zip Code

Master data of Area or Zip codes in the operational geography of CM helps in associating state laws. By associating these state laws, you ensure CM adheres to local statutory requirements with respect to dialing out contacts at various times of the day, weekends, etc.

Zip Code

Follow the steps listed below to add **Zip Codes**.

1. Click the **Area Zip Code** icon (shown below).

2. This opens the **Zip Code** screen as shown below.

3. The screen shows a listing of all zip codes.

4. You can also use the **Search** box to search for zip codes.

5. You can either add zip codes or import them from a flat file.
   Note: If you are importing zip codes from a file, skip to **Step 12**.

6. Click **Add Zip Code** to add a new zip code.

7. Enter a **Zip Code**.

8. Enter a **Zone Name** to which this zip code belongs.

9. Enter a **City** for this zip code. This is an optional field.

10. Enter a **State** for this zip code. This is an optional field.

11. Click **Save**.

12. If you are importing zip codes from flat files, click **Import Zip Code**.

13. Click **Choose File** to select a file to import zip codes from.

14. All fields in the upload file are available for selection in the drop-down lists for mapping. From these fields, map the **Zip Code**, **Zone Name**, **City**, and **State**.

15. Click **Import**.

16. The import result pops up showing the count of imported records for each of the following:

    – Total records imported

    – Successful records added as zip codes

    – Records with error in time zones

    – Duplicate records

    – Other failure

17. Click **Close**.

Area Code

Follow the steps below to add **Area Codes**.

1. Click the **Area Zip Code** icon (shown below).

   Area Zip
   Code

2. This opens the **Area Code** screen as shown below.

   System Configuration   System Menu
   Area / Zip Code

   Zip Code   **Area Code**

   ADD AREA CODE   IMPORT AREA CODE

3. The screen shows a listing of all area codes.

4. You can also use the **Search** box to search for area codes.

5. You can either add area codes or import them from a flat file.

   Note: If you are importing area codes from a file, skip to **Step 12**.

6. Click **Add Area Code** to add a new area code.

7. Enter an **Area Code**.

8. Enter a **Zone Name** to which this area code belongs.

9. Enter a **City** for this area code. This is an optional field.

10. Enter a **State** for this area code. This is an optional field.

11. Click **Save**.

12. If you are importing area codes from flat files, click **Import Area Code**.

13. Click **Choose File** to select a file to import area codes from.

14. All fields in the upload file are available for selection in the drop-down lists for mapping. From these fields, map the **Area Code**, **Zone Name**, **City**, and **State**.

15. Click **Import**.

16. The import result pops up showing the count of imported records for each of the following:

    – Total records imported

    – Successful records added as area codes

    – Records with error in time zones

    – Duplicate records

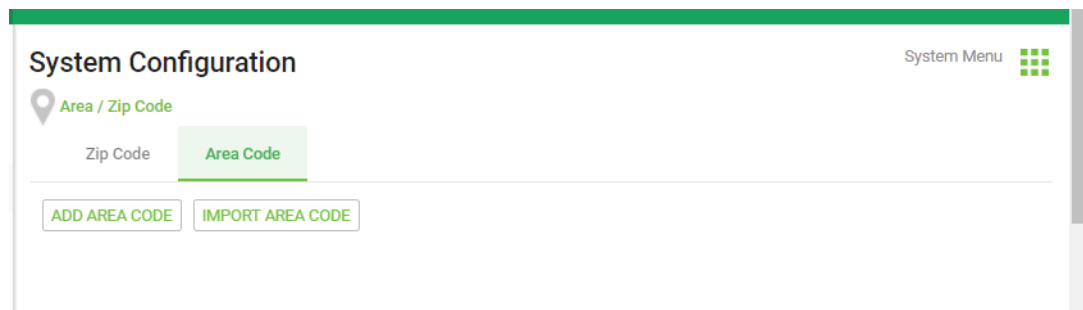   – Other failure

17. Click **Save**.

State Law

Various geographical regions like states, countries, etc. have laws that regulate contact center operations. You can configure these state laws in CM Console to ensure that your contact center operations adhere to the statutes of the geographical regions they operate in.

For example, a state might have a regulation that no contact center can reach a contact between 8.00 PM and 6.00 AM. You can configure your CM Console to ensure that the contacts are delivered for dialing only outside these hours and rest assured that the contact will not be delivered in violation of a state law.

1. Click the State Law icon (shown below).

   State Law

2. The **State Law** screen is shown below.
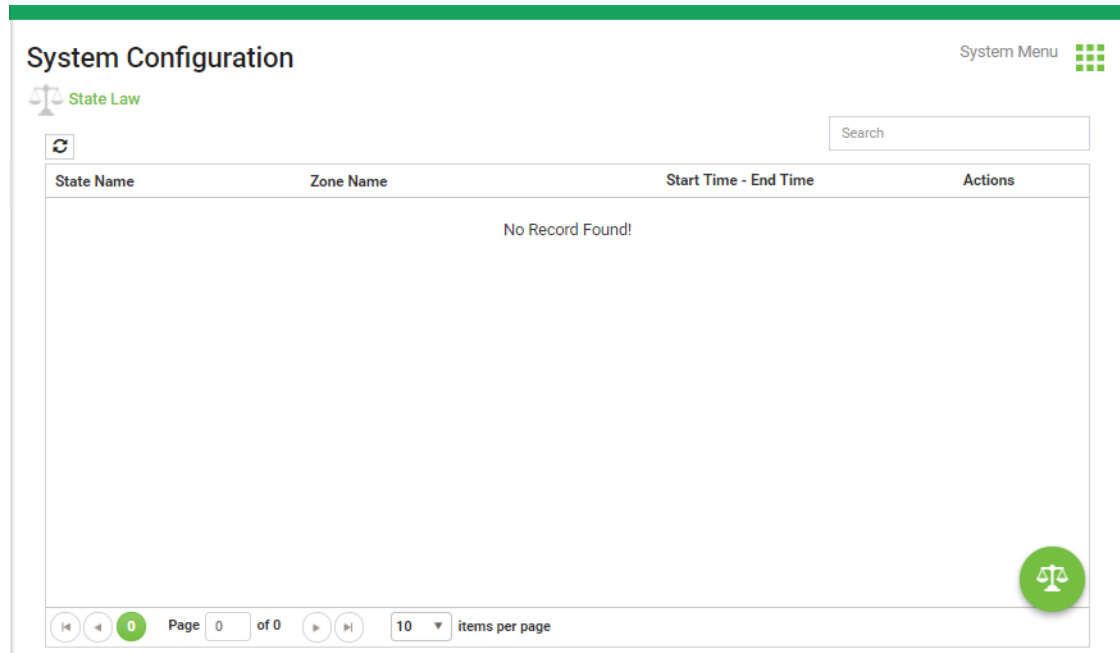
3. Click **Add State Law** to add a new State Law.

4. Enter a **State Name**.

5. Select a **Zone Name** from the drop-down list.

6. From the **Time** panel, select a time range (Start - Stop) in which the state law operates.

7. To set state law applicability for different days of the week, select the **Set Week Days' Timing** check box.

8. Select the state applicability timing for each day of the week.

9. Click **Save**.

10. Navigate to the **Select Zip Code** section to select the zip codes that are applicable for this state law.

11. All zip codes mapped to this state law are populated.

12. You can use the **Search** box to search for specific zip codes.

13. Select check boxes corresponding to the zip codes that you want mapped to this state law. To select all zip codes, select the **Select All** check box.

14. Navigate to the **Select Area Code** section to select the Area codes that are applicable for this state law.

15. All area codes mapped to this state law are populated.

16. You can use the **Search** box to search for specific area codes.

17. Select check boxes corresponding to the area codes that you want mapped to this state law. To select all area codes, select the **Select All** check box.

18. Navigate to the **Select Holiday** section to map holidays to this state law.

19. All the holidays are populated in this section.

20. Select check boxes corresponding to the holidays that you want mapped to this state law. To select all holidays, select the **Select All** check box.

21. Click **Save All** to complete creating and configuring State Law.

Holidays

Holidays are declared in various geographies on account of festivals, observances, birth anniversaries, etc. These are days that the campaigns do not normally run. You can add holidays that are available across the entire application. Once added, you can map these holidays to various campaigns as required by the local geography.

1. Click the Holidays icon (shown below).

2. This opens the **Holidays** screen as shown below.

3. Holidays, if any, are populated on the **Holidays** screen.

4. Click **Add Holiday** to add a new **Holiday**.

5. Enter a **Holiday Title**.

6. Enter a **Start Date** and a **Last Date** for the holiday. Repeat the Start Date as the Last Date for any one-day holiday; for holidays spanning multiple days (like Christmas or year-end vacation), enter the date range.

7. Click **Save**. The holiday is added to the list.

8. Click **Add Holiday to Campaign** to add the saved holidays to campaigns.

9. Select check boxes corresponding to the holidays you want to add to campaigns. To add all holidays, select the **Select All** check box.

10. A pop up shows the application-wide campaign list.

11. Select the check boxes corresponding to campaigns that you want to map the selected holidays to complete mapping. To select all campaigns, select the check box in the grid header line.
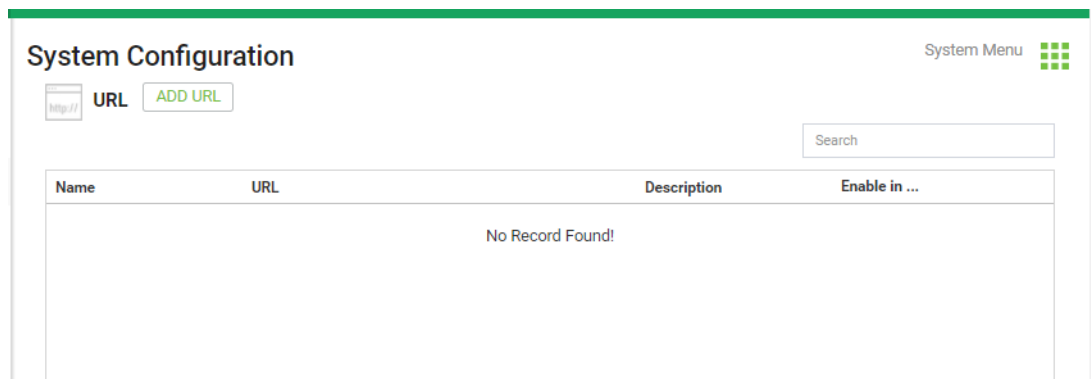
12. Click **Save**.

URL

DO NOT USE the URL feature in this release.

You can embed any custom page or a website into the CM application so as to launch the same from within CM. This eliminates the need to browse a frequently seen web page by opening another browser tab.

1. To open the **URL** screen click the URL icon (shown below).

2. The URL screen opens as shown below.

3. The page shows the URLs already added to the application.

4. Click **Add URL** to add a new **URL**.

5. Enter a Web page **Name**.

6. Enter the URL for the Web page.

7. Enter a **Description** for the Web page.

8. Select the **Enable to System Menu** check box to display a shortcut to this URL on the System menu. This helps you access the URL in a single click without having to navigate to this screen.

9. Click Save. The URL is added to the list.

Profile

Profiles can be defined as shortcuts that help you through the entire gamut of contact-related uploads. Create and save various profiles. Use these profiles to upload (including Global Upload) contacts, scrub contacts, or upload Compliance (DNC/NDNC/PEWC) contacts. The various activities associated with such uploads—setting parameters, mapping various fields, etc. are handled at the profile level and are not required to be repeated at the time of upload.

Follow the steps listed below to create a **Profile**.

1. Click the Profile icon (shown below).

2. The Profile screen opens as shown below.

3. The **Profile** screen shows a listing of all the Profiles. Click the **Create Profile** button to add a new **Profile**.

4. Enter a **Profile Name**.

5. From the **Campaign ID** drop-down list, select a campaign to which this profile is attached.

6. Enter a **Profile Path**.

7. Select an **Upload Type** for this profile from the following options:

   - **Upload Contacts** - to upload contacts for CM to deliver to the Dialer
   - **Scrub Contacts** - to clear contacts in the CM database before a fresh upload
   - **Compliance** - to upload DNC/NDNC/PEWC contacts

8. Click **OK**.

9. There are three possible sources from where your can upload contacts:

   - **Formatted File**: The contacts are available in a formatted file with various fields separated by a common separator or a comma-separated file.
   - **Database**: The contacts are available in a **Database Table** or **View** and can be uploaded directly to the campaign from the database.

10. If you are uploading from a formatted file, complete the following:

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

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

11. If you are uploading from a database, complete the following:

    - Enter the database **Server Name**.
    - Enter the **Database Name** from which you intend uploading contacts.
    - Enter the **Username** for the application to access the database server.
    - Enter a **Password** for the above user to complete authentication.
    - Click the **Connect** button to establish contact with the database server.
    - From the **Table Name** drop-down list, select a table that contains the contacts to upload.
    - Click the Upload button to upload the contacts from the database table.

12. For all the uploaded contacts, complete **Field Mapping**.

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

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

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

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

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

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

   Note: A configuration file setting controls permission to this feature.

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

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

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

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

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

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

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

13. Proceed to **Modes Mapping**.

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

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

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

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

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

16. Complete the **Message Mapping** section by mapping both **Mailing Fields** and **SMS Fields**.

    • **Subject**: The subject line of the Email message.

    • **Body**: The Email message body.

    • **Attachment**: The path to the attachment file that goes with the Email. Ensure the contact upload file contains a field showing path of attachment file is located in the path mapped

    • **SMS Fields** - Map a field from the Message drop-down list.

17. Complete the **Configuration** section next.

18. Define the level for which this upload is applicable.

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

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

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

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

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

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

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

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

21. **Filter**: Contacts from lists can be filtered on the basis of two business fields.

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

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

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

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

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

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

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

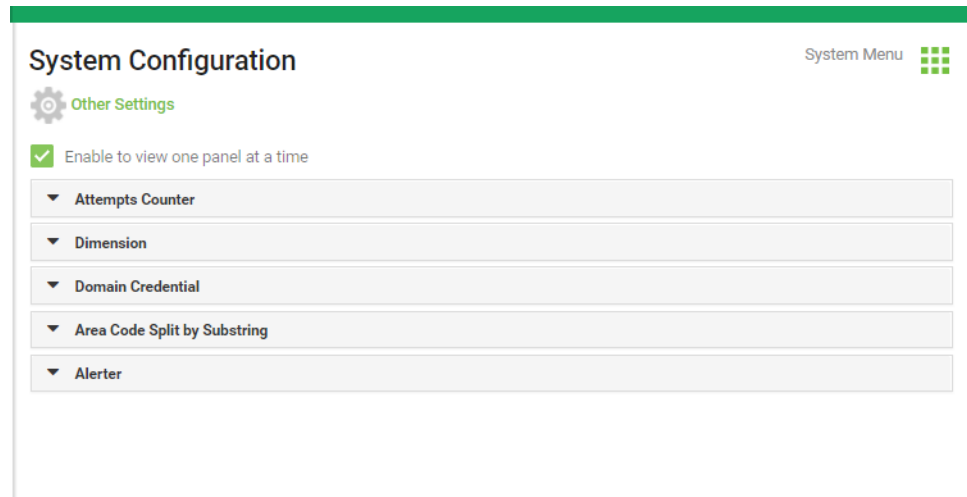23. Click **Save Profile** to complete creating a **Profile**.

Other Settings

The other System settings that are required are described in the following sections:

- Attempt Counter

- Dimension

- Area Code Split by Substring

- Alerter

1. Click the **Other Settings** icon (shown below).

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

Attempt Counter

Using the **Attempt Counter** you can assign outcome types to each pre-configured telephony outcome. Besides assigning outcome types, you can also keep a count of every retry made for contacts being dialed out from the application. The **Attempt Counter** screen is shown below:
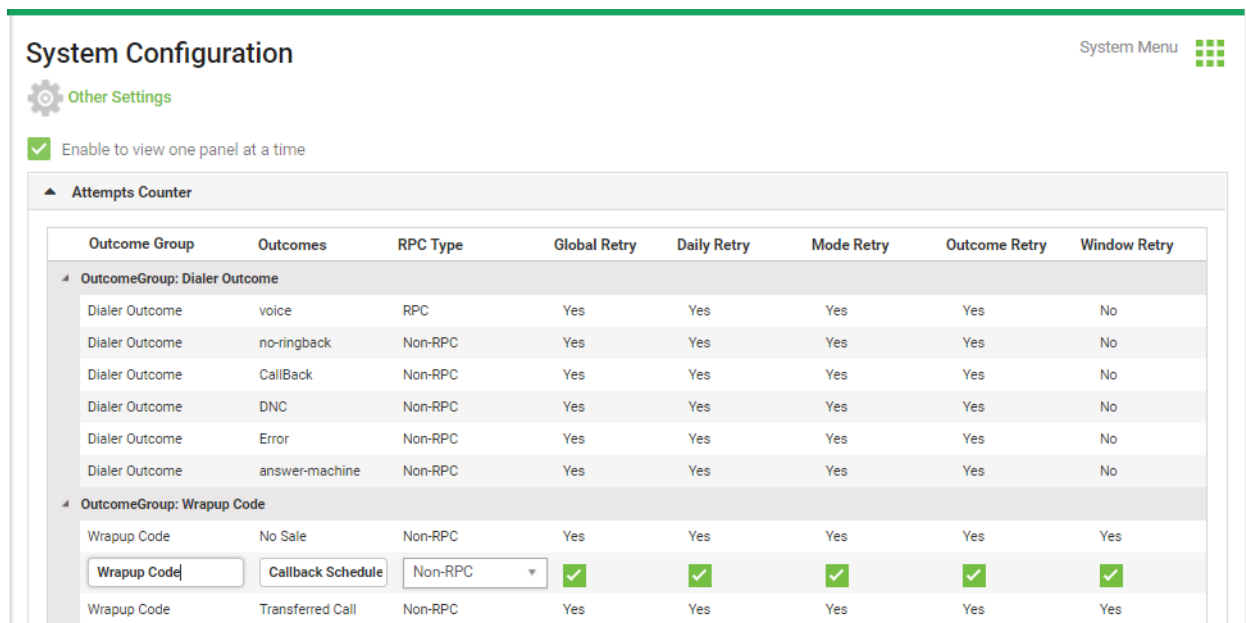
1. The **Outcomes** column lists all the telephony outcomes.

2. The **Type** column states the Outcome Type for each outcome—in this case Telephony Outcome.

3. The **RPC Type** column allows you to set the outcome as **RPC Type** or **Non-RPC Type**.

   - **RPC**: Right Party Contact is the telephony outcome when you can confirm that the person you intended to contact has responded to your voice call.

   - **Non-RPC**: This is the telephony outcome when your voice call is not answered by the intended person. For example, an answering machine, fax machine, no reply, etc.

   Note: You cannot add any new Telephony Outcome. You can only change the assigned outcome type from RPC to Non-RPC or vice versa.

4. The subsequent columns contain check boxes for **Global** Retry, **Daily** Retry, **Mode** Retry, **Outcome** Retry, and **Window** Retry. Select the check boxes corresponding to the outcomes that need to be counted (incremented). This determines if the maximum retries number is reached in respect of the various type of retries. Subsequent treatment of the contact is as configured.

Dimension

A powerful addition to the suite of CM reports, **Dimension** enables building of customized reports. This is in addition to the already built-in wide range of real-time and historical reports, dealt with in a separate user guide.

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

1. Click **Create Dimension** to create a new Dimension.

2. Enter a **Dimension Name**.

3. Enter a **Description**.

4. Enter a **Dimension Value**. For example, for a Business Field Card Type, the values may be Credit Card, Debit Card, Charge Card, or Loyalty Card. Assuming you want a customized report grouping enterprise-level data on credit card, you can enter Credit Card in this field

5. To add more values, click the **Add** button. In the same report mentioned above, you may also need data pertaining to Debit Card. Use this option to add another **Dimension Value**.

6. To delete existing values, use the **Delete** button.

7. Click **Save** to complete creating a new Dimension.

Area Code Split by Substring

Every contact that is uploaded has an area code, apart from the telephone number. The application needs to segregate the area code and the telephone number. Area Code Split by Substring helps in accomplishing this task.

1. Select a Start from the slider. This is the first character from where the area code starts. For example, if your contact details contain 12 digits and the area code commences in the first digit select 1 from the slider.

2. Select a **Length** from the slider. This is the first character from where the area code starts. For example, if your contact details contain 12 digits, and the area code is five digits long from the first digit, select 5 from the slider.

3. Click **Save**.

Alerter

The CM application is made up of various components and services. All of these have to work in tandem for the application to function smoothly and seamlessly. There is bound to be some disruption if any service does not work.

Alerter is a self-detecting facility on the application that scans all the services and components for proper working. If some service is down, the alerter sends out an alert by Email to a designated Email ID that is configured here.

1. Enter a **Sender Email ID**—this is displayed in the From field when the alerter sends out a mail.

2. Enter an **SMTP** server name that the Email is sent from.

3. Enter an **SMTP Port** that is reserved for the SMTP server.

4. Enter a **User Name** for the SMTP server that CM can use to send Emails.

5. Enter a **Password** for the above User Name for authentication.

6. Enter a **Recipient Email ID**. The alert Email is sent to this Email.

7. To add more recipients, click **Add** and add Email IDs.

8. To delete recipients, use the **Delete** button.

9. Click **Save**.

5 Contact Strategy

Contact Strategy is about configuring a set of rules for various modes. This set of rules decides the mode on which a contact is reached (usually based on the weight assigned to the mode), the time at which a contact is reached on a specific mode, the time when retries are dialed out on configured modes, etc. This means you must have a Contact Strategy in place which tells the application what to do to reach an elusive. You could, at the first unsuccessful try, reduce the priority for this mode, and then 'instruct' CM Console through your Contact Strategy to either try the contact on the mode with the next higher priority, reschedule the contact to a later time on the same mode, branch the contact to a different mode, or even close the contact. In short, your Contact Strategy configuration largely contributes to the success or otherwise of a campaign. Before we set about describing how to configure a Contact Strategy on CM Console, let us have a look at how contact strategies work.
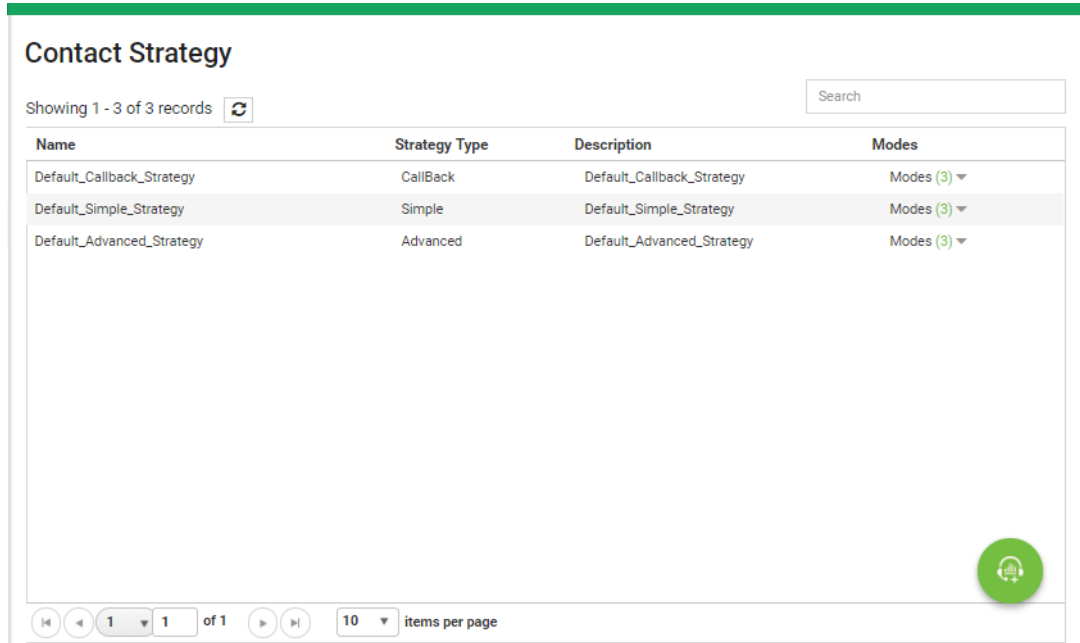
Contact Strategy Types

CM supports three types of contact strategy.

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

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

- **Callback Strategy**: A callback strategy allows the agents to set callback requested by the customer and configure various aspects as to how callback calls are handled with respect to dialing, agents, retries, contact status, etc.

Creating a Contact Strategy

Follow the steps listed below to create a Contact Strategy.

1. Click **Contact Strategy** in the menu pane on the left to open the Contact Strategy page.

2. In the grid displaying the available contact strategies, you can check out the modes for any contact strategy by clicking the Modes. All modes for the contact strategy are displayed.

3. To add more modes to this contact strategy, if required, click the Add Modes button and follow instructions in Modes.

4. Click FAB (shown below) to add a new contact strategy.

5. Complete three widgets to add a new contact strategy.

Widget 1 - Contact Strategy Name

Follow the steps listed in this section to complete the Contact Strategy Name widget.

1. Enter a **Contact Strategy Name**.

2. Enter a **Description**.

3. Select a **Contact Strategy Type** from Simple, Advanced, or Callback.

4. Turn the **Restrict Multiple Email and SMS** switch **ON** if you want to control sending of multiple Emails and text messages to the same contact. Turning this **ON** means the application sends only one Email or SMS to a contact for a specific campaign.

5. Click **Next** to navigate to the **Select Mode** widget.

Widget 2 - Select Mode

Follow these steps to complete the Select Mode widget

1. Select a **Mode** - all modes created are available for selection.

   Note: To create a new Mode and select it for this contact strategy, click ➕.

2. Use the pop-up time panel to select a **Time Range** for this contact strategy to be operational.

3. If you are creating a Simple or Callback contact strategy, skip to **Step** 5.

4. Use the slider to configure the **Mode Retries** for this contact strategy.

5. Turn the **PEWC** switch **ON** to enable PEWC for this contact strategy.

PEWC or **Prior Express Written Consent** - A compliance mandating telemarketers to obtain the prior express written consent of the called party for autodialed or prerecorded telemarketing calls to wireless numbers and prerecorded calls to residential landline.

6. If you are creating a Simple or Callback contact strategy, skip to **Step** 11.

7. Turn the **Transition Retry** switch **ON** to enable a **Transition Window** for this contact strategy.

Transition Window
Transition Window offers the ability to constrain/limit the number of attempts for each mode across a defined duration threshold. Situations may arise, due to some statutory regulations or requests, when contacts in a campaign can be reached out for dialing only a specified number of times during a specified time period. This is addressed by the Transition Window feature.

For example, a certain contact is to be reached only three times during a five-day period. When this contact comes for delivery to the Dialer on say, 1 July 2016, CM Console checks the dialed dates and time for the previous four days, that is 27 June to 30 June, 2016. If the contact has been dialed three times in the five-day period ending 1 July, 2016, the contact is not delivered. If the contact has been dialed twice (say 29 July and 30 July, 2016), another attempt is allowed on 1 July, 2016. Let us assume this attempt also requires a retry. The contact is next rescheduled 4 July, 2016—this ensures that the five-day, three-attempts configuration is not breached.

8. Use the **Transition Attempts** slider to fix the number of attempts in a transition window for this contact strategy.

9. Use the **Transition Duration (Days)** slider to set the number of days for the transition window.

10. Click **Previous** to navigate to the previous screen at any time.

11. Click **Next** to navigate to the **Telephony Outcomes** widget.

Widget 3 - Telephony Outcomes

Telephony Outcomes is the final widget to complete configuring the contact strategy.

1. The grid contains the **Outcomes** list. Configure your contact strategy for each outcome listed in the grid.

2. All rows are loaded with default values. Click the row to configure to change to editable mode and make required changes.

3. From the number panel, select the **Reschedule Time (D:H:M)** for the call to be rescheduled for this outcome.

4. From the number panel, select the **Max Retries** for this outcome. This is applicable only for **Advanced** or **Callback** contact strategies.

5. From the number panel, select a **Priority** for this outcome. The application delivers contacts to the Dialer based on the priority.

6. From the number panel, select a **Priority** for this outcome. The application delivers contacts to the Dialer based on the priority.

Priority is the adjustment you want to make to this mode for this outcome. For a set of contacts selected and ready for delivery, those with higher priority are delivered first to the Dialer.

7. Select a **Branch Mode**—an alternate mode to reach the contact on if the primary mode does not work out. This is applicable only for **Advanced** or **Callback** contact strategies.

8. Select the **Retain PCB** check box if the same agent has to service the customer in a callback. This is applicable only for **Callback** contact strategy.

9. Select the **Close Contact** check box if you want to close the contact based on this outcome.

10. Select the **Remove Mode** check box if you want to remove the Mode for a combination of this contact strategy and this outcome.

11. Click the **Save and Add Another Mode** button to save the Contact Strategy configured thus far, and continue configuring Contact Strategy for another mode. Follow instructions in "Widget 3 - Telephony Outcomes" to configure more modes.

12. Click **Save** to complete creating and configuring a Contact Strategy.

6 Users

CJP users do not get imported into CM. Do not create users or roles or perform any actions on the CM Users page.

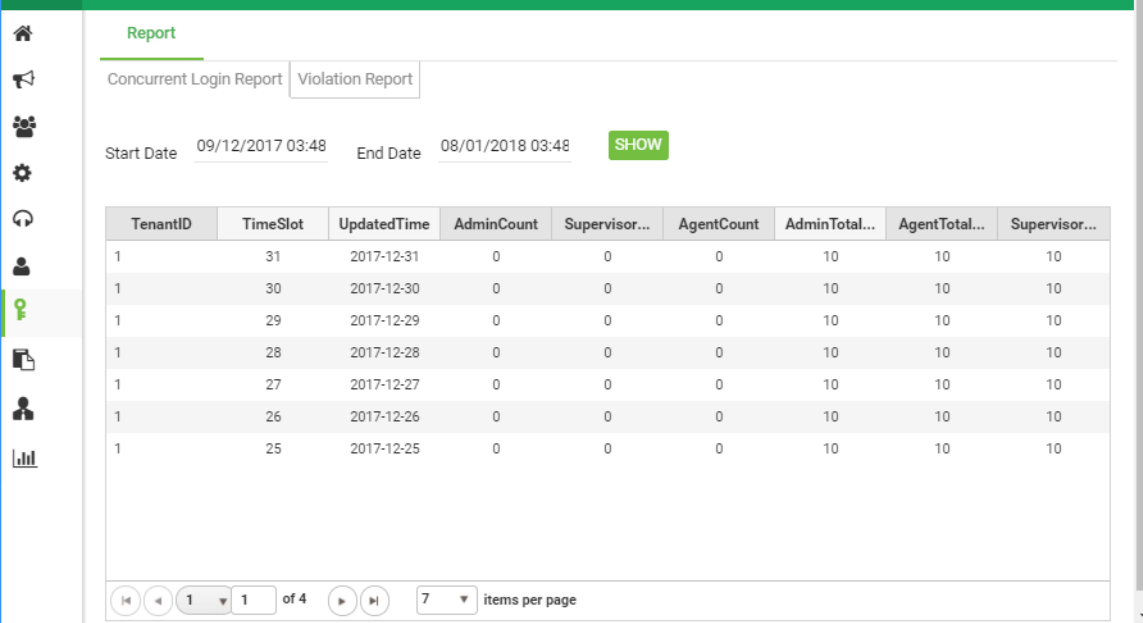CJP users whose profiles provide access to Campaign Manager are automatically given access to all the CM capabilities.

7 License Reports

The **License** page displays two Usage reports:

- Concurrent Login Report
- Violation Report

For descriptions of all reports available from the CM console, see the in the *Cisco Customer Journey Platform—Campaign Manager Reports Guide.*

8 Script Designer

Script Designer is a scripting tool that helps you configure call guides. Based on your script configuration, the tool automatically writes an executable script.

A call guide is a script for agents that displays predefined questions to be posed to a contact when a call is connected. Based on the answers, the agent can either proceed to the next question or ask a supplementary question taking off from the previous question. You can configure a set of questions, answers, and supplementary questions for the agents to use.

Click **Script Designer** on the CM console menu pane to open the Script Designer.
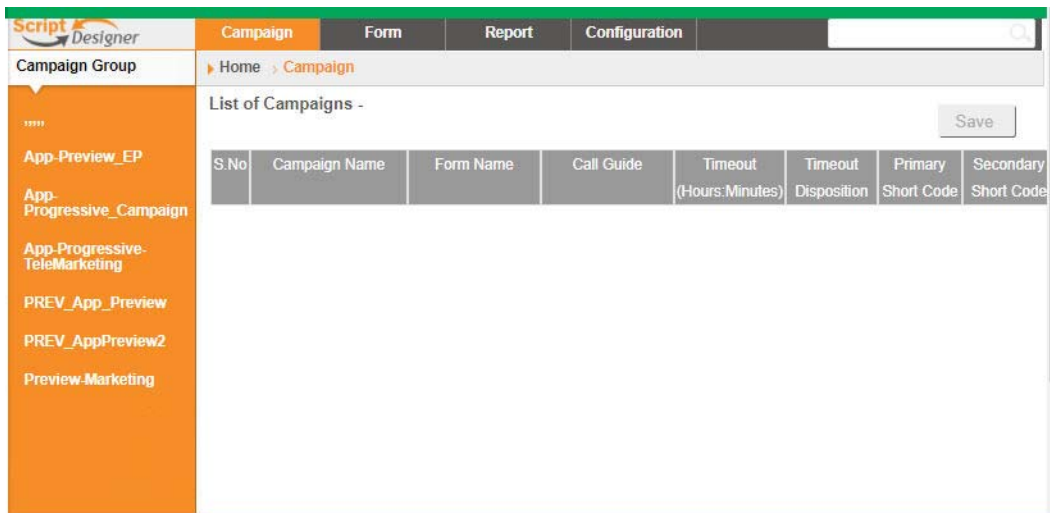
Topics covered in this chapter:

- Campaign

- Forms

- Question Sequencing

- Copying a Form

- Library Functions

- Reports

Campaign

Using the **Campaign** tab, select available campaigns from the displayed campaign groups, attach or replace questionnaire forms, and configure parameters for call guide.

All available campaign groups, except Shared List Campaigns, are displayed on the left pane of the screen. Click any campaign group to display all associated campaigns for this group. You can also use the **Search** box to search for campaigns.

Follow the steps listed below.

1. Select a **Campaign** from the list.

2. If a call guide already exists, select it from the **Call Guide** drop-down list. Otherwise, click the campaign name to create a new call guide and then select the **Call Guide** check box.

3. If a form already exists, select it from the **Form Name** drop-down list. Otherwise, click the campaign name to create a new form.

Forms

An administrator can create a set of predefined questions/messages and attach them to a form. Each question/message is popped to the agent handling the call.

Using the **Form** facility, create questions, write conditions to questions, and link one question to another based on the customer response. You can write a JavaScript function or use an in-built JavaScript function.

1. Select a **Campaign** from the list.

2. Navigate to the **Form** tab to create a form.

3. The following elements are available for configuration:
   - Global Variables
   - Script Block
   - Text
   - Option Choice

Creating Global Variables

You can assign values to Global Variables and use them in the call guide.

Note:

- This is an optional feature.
- Global Variables are case-sensitive.

1. Click **Global Variable** from the left pane.

2. Enter a **Key** and the assigned **Value**. For example, Account Type could be the key and Gold could be the value.

3. Click the **Add** button to add more global variables.

4. To delete a global variable, click the **Delete** button corresponding to the global variable you want to delete.

5. Click **Remove** on the top-right of this section to delete all global variables.

Script Block

You can write or use a JavaScript function to perform calculations, validate/decide business logic, or invoke a REST API Webservice. You can use any script function in the condition field, assign value, or call script fields. You can read global variables in the script but you cannot reset the value unless it is a non-primitive type.

Note:

- Script variable names and global variable names in the script should be unique.
- ActiveX components and AJAX call are not supported in the script block.
- You can use JQuery in the script block for call guides.

1. Drag and drop the **Script Block** icon on the left pane to display the screen.

2. Enter the script code text if it is a new script, or copy and paste from an existing script.

3. Click the **Remove** button to clear the script.

Text - Welcome

Using the **Text** configuration tool, you can configure questions for the call guide or edit questions in a call guide. The first 'question' is usually a welcome message that the agent reads out to the customer. You can use the Business Fields to populate the customer name.

1. Drag and drop the **Text** icon on the left pane to display the screen.

2. Continue the process to creating a call guide.

3. Click the **Save** button to save the question to the call guide.

4. Click the **Add** button to add more questions.

5. Click the **Edit** button to edit questions.

6. Click the **Delete** button to delete any question.

You can copy any question from the call guide and either re-use the same question in a different sequence or edit the question before using in a different sequence.

After welcoming the customer, proceed to create the next question using the form.

Account Number

After welcoming the customer, the call guide is configured for the agent to obtain the customer account number.

Check Box

Drag and drop the **Check Box** icon on the left pane to display the screen.

Multiple Choice

You can also configure a question that has multiple answers. You can list the answers that the agent selects from his desktop as the customer selects.

For example, the campaign has a question on the assets that a customer holds—home, car, motorcycle, etc. The agent can select multiple assets that the customer holds.

Choose from a List

You can also configure a question where the answer is in a list. The customer chooses one item from the list and the agent marks the selection on the desktop. In case the customer chooses an item not on the list, the agent can dynamically add the item to the list and complete selection. This addition will also be available in the list from the agent logs out and logs in afresh.

Drag and drop the **Choose from a list** icon on the left pane to display the screen.

Text - Thank You

When the entire flow is completed, the agent can sign off with any message—a Thank You or a promotional message. You can also tag a business field (for example, first name or a last name).

Business Fields

All business fields associated with a campaign are populated in this section.

From the left pane, drag and drop the business fields on the value fields to store business fields for conditions. [BFLD.BusinessFieldName] is the format for business field.

Global Variables

The global variables you created using "Creating Global Variables" (on page 101) are populated under the Global Variables section.

From the left pane, drag and drop the global variables on the value fields to set or store this global variable for the condition.

Question Fields

All question fields created for this form are populated here. Add any number of question fields (answer you received for this question) in a question block. You can use question fields in the text area or anywhere in the conditions fields.

From the left pane, drag and drop the question fields to set or store this answer for the selected condition.

> **Note:**
>
> - String is generally used as the datatype for Question Field. If you want to use a datatype other than string, use the corresponding JavaScript parsing functions such as (parseInt(), parseFloat(), etc.
>
> - Question field values are case-sensitive.

Hovering over the **Question** pane shows a slew of options that you can exercise:

1. Click the **Copy** button to copy a question.

2. Click the **Paste** button to paste a copied question from the clipboard.

3. Click the **Discard** button to discard the copied question that is in the clipboard.

4. Hold and drag the question to move the question to a different position—for example, from third question to fifth question.

5. Click the **Delete** button to delete a question; click **OK** to delete and dismiss the dialog box.

Question Sequencing

The call guide should be configured in a manner that it helps the agent to deal with the customer call in a proper and structured manner. Beginning with the welcome message, obtaining details, and then signing off with a farewell message—all of these can be accomplished by sequencing the questions properly.

Expand the question to open the sequencing section as shown below.
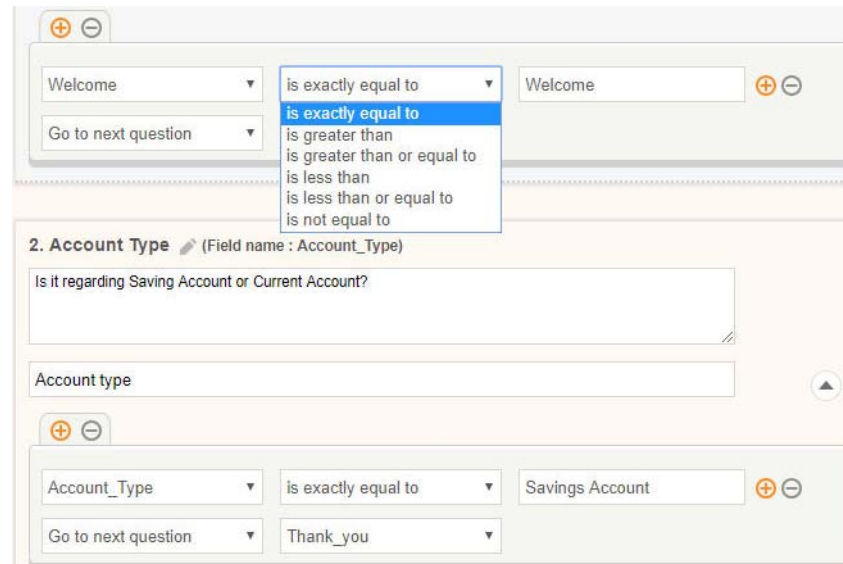
You can also validate some information that you obtain from the customer. For example, you can validate an account number—if the account is valid, the call guide should be configured for the next question; otherwise, the call guide should hint to the agent to inform about the invalid customer number and drop the call. The conditions shown can be used to validate the information given by the customer.

Once the information is validated, configure the next question that the agent should ask the customer. The list of questions can be selected as shown below.

After validation, you can configure different sequencing dependent on the customer response. You have the following options to configure the question sequencing:

- **Go to next question**: Select this option to go to a next question. In the Select question drop-down list, select the next question.

- **Reset & Go to next question**: Select this option to ask the next question to a customer by resetting the previous answers for the preceded questions. In the **Select question** drop-down list, select the next question to be followed after this question is sent.

- **Assign value**: Select this option to assign a value for a global variable. The screen shown below is displayed. In the **Select Variable** drop-down list, select the global variable for which you want to assign a value. In the adjacent field, use a business field, question field (the answer you received for this question), JavaScript function, or even a global variable as a value by dragging and dropping on this field. You can also give a custom value. By assigning a new value for a global variable, the old value is removed from the memory and the new value is taken. After assigning a value for a global variable, select the next option you want from the next drop-down list.

- **End session**: Select this option to end this session. The screen shown below is displayed. By selecting this option, the session stops after this question is sent. In the Select disposition drop-down list, select a business or telephony disposition. You can configure End session message such as Thanks for participating for the agent to read out to the customer.

- **Call script**: Select this option to call a JavaScript function. The screen shown below is displayed. Enter the script function name in the adjacent field to complete this action. By selecting this option, you can perform custom actions such as calling a Web service, validation, etc. Select the next option you want from the next drop-down list. You cannot return a value from JavaScript function.

> **Note:** You cannot reset the primitive types such as integer, float, decimal, string, etc.

Click the **Edit** button to edit the fields.

Click the **Delete** button to delete the condition.

Click the **Add** button to add an **OR** (or) **AND** condition.

> **Note:**
> - You can save a form without having to address the question or condition fields. Enter a form name and its description to save a form.
> - You can open an existing form to create questions and add conditions later.

Copying a Form

Click the **Copy** button to copy this form to other campaigns within this campaign group. When copying a form to other campaigns, make sure the business fields created in the campaigns are in sync with the business fields you configured in the form. The dialog box is shown below.

> **Note:** You cannot copy forms across campaign groups.

Copy Form

Select Campaign   -- Select --

Form Name

Create   Cancel

1. From the **Select Campaign** drop-down list, select the campaign to which you want to copy this form. Enter a unique name in the **Form Name** field.

2. Click **Create** to create a form. The **Saved successfully** message appears for confirmation.

3. Click **Delete** to delete a form. Click **OK** to delete and dismiss the dialog box.

4. From the **Select Form** drop-down list (see top-right of the screen), select **New Form** to create a new form or select the desired form to edit an existing form.

Library Functions

CM provides a list of in-built JavaScript functions. You can also create customized JavaScripts in the Script Block.

From the left pane, drag and drop the library functions on the value field. The format for library function is txml.(FunctionName). For example, txml.ToLower("GOLD").

Use Library Functions for the following fields:

- Assign Value
- Call Script
- Boolean Condition
- Value Field
- Text Area

Reports

Complete details of all reports on the CM application are available in the *Cisco Customer Journey Platform—Campaign Manager Reports Guide.*

9 Teams

A team is a grouping of agents in CJP. Teams that have been created in the Provisioning module of the CJP portal are listed on the CM **Team Mapping** page.

When you create a Preview campaign, you must assign one or more teams to the campaign. You can also assign teams to a Preview campaign on the Team Mapping page.

To see which campaigns are assigned to a team:

1. Click **Teams** in the menu pane on the left to open the **Team Mapping** page.

2. Click the **Expand** button to the left of a team name.

To assign a team to a campaign:

1. Click **Edit** in the **Action** column for the team you want to assign to a campaign.

2. On the **Campaign Mapping** screen that opens, select one or more preview campaigns.

3. Click **Save**.