



Tetherfi Campaign Manager

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1. Preface

Welcome to the *Tetherfi Campaign Manager 1.0 User Guide*. This document describes how to design and maintain campaign.

This preface provides an overview of this document, intended audiences and document version.

Tetherfi Campaign Manager application is a sophisticated outbound dialer for running successful campaigns. It is an easy-to-use web application with advanced features that anyone with the prior knowledge of using the web application can quickly grasp the features and successfully run an end to end campaign.

Who should read this guide?

This guide is intended for anyone managing outbound campaigns in Tetherfi Campaign Manager application.

Every effort has been made to present the application in an easy-to-understand manner. There are a significant number of unique features and market leading functionalities demonstrated here. Some of the terminologies might be new to you and there is a Glossary section provided to help you out.

Document Version

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document.

Glossary

No.	Short Form	Abbreviation
1	TCM	Tetherfi Campaign Manager
2	TMAC	Tetherfi Multimedia Agent Client
3	OCM	Omni Channel Management
4	VDN	Vector Directory Number

2. Access Management

TCM access is provided in OCM application. Let us see the configuration changes required.

Configuration in TCM

Administrator has to provide access to Supervisors and other users who will be accessing the TCM application. Certain configuration changes have to be made in the TCM to access it from OCM.

Below is the path of the configuration file.

TCMUI/ Web.config file

- `<add key="ApplicationAccesssType" value="role"/>`
ApplicationAccesssType value accepts page/role
- `<add key="CheckForUserAccess" value="1" />`.
It accepts value 0 or 1. It has to be always 1. Value if 1 will always check OCM for access.

OCM modules required for TCM access

OCM is an Omni Channel Management application. All the products of Tetherfi are provided access in OCM. TCM access procedure is explained in detail below.

There are 3 modules in OCM that are required to access TCM application.

1. Role Based Access Management
2. User Role Mapping
3. Campaign Manager

Role based Access Management module and User Role Mapping module are displayed in the Home menu.

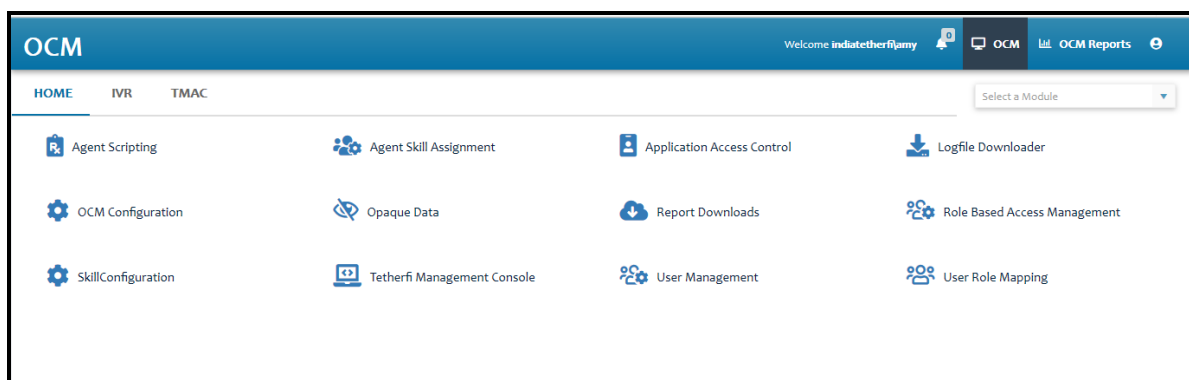


Figure 2.1 – Role Based access Management and User Role Mapping module in Home menu

Campaign Manager Module is present in the TMAC menu of OCM. This module will be displayed only if the logged in user is provided access to the module.

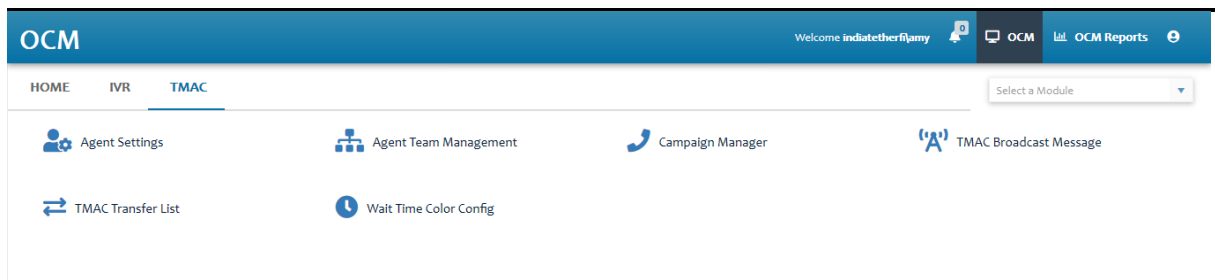


Figure 2.2 - Dynamic Contact fields in TMAC

Role Based Access Management

Different roles that are created will be available in this module.

Procedure:

1. In the **Home** menu, click on **Role Based Access Management** module
2. **Role Based Access Management** module will be displayed
3. All the roles that are created in OCM will be displayed in the grid
4. Select the role to which Campaign Manager module access has to be provided

The screenshot shows the OCM application interface with the 'Role Based Access Management' module selected. The table below lists the roles and their details:

Role Name	Last Changed By	Last Changed On
Administrators	indiatetherfi@vakhshith	26/03/2019 15:20:35
Builtin	IndiaTetherfiAdministrator	19/12/2018 18:47:58
IndiaTetherfiAdministrator	indiatetherfi@anitha	26/03/2019 15:22:56
jane	IndiaTetherfi@chetan	16/08/2018 11:20:50
Maker Checker	IndiaTetherfiAdministrator	07/03/2019 16:00:25
OCM Checker	indiatetherfi@chetan	23/11/2018 11:21:30
OCM Maker	IndiaTetherfiAdministrator	29/03/2019 13:45:24

Figure 2.3 – Selecting role in Role Based Access management module

5. Click on the selected role. Role Based User Access pop up window is displayed.

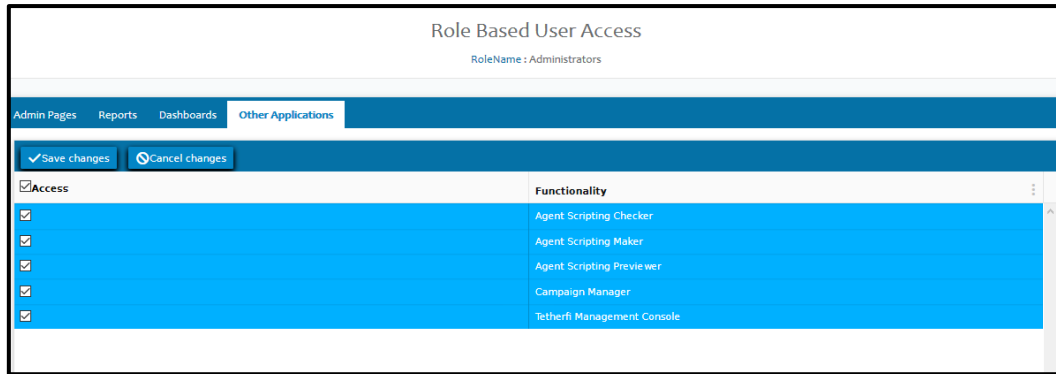


Figure 2.4 – Role Based User Access pop up window

6. Click on **Other Applications** tab.
7. Check **Campaign Manager**.
8. Close the pop up window
9. **Campaign Manager** module is now mapped to a Role

Now let us map the role to a user. This mapping has to be done in User Role Mapping module.

User Role Mapping

Procedure:

1. In the **Home** menu, click on **User Role mapping** module
2. Click on the user to whom the role has to be mapped
3. Add the role to the user

For the changes to be reflected, logout of OCM and login, Campaign Manager module will be displayed in the Home menu. Click on this module to navigate to TCM.

3. Home Menu

About Home Menu

Home menu is the default menu on navigating to the application. On clicking the Home menu, user will be navigated to Tetherfi Campaign Manager landing page. Home menu will be highlighted in green colour. There are 4 menus in the landing page menu bar.

1. Campaign
2. Contact
3. Skill
4. Schedule

By default, in the main menu bar, only Campaign menu will be highlighted and enabled. Rest of the menus are disabled. In the campaign menu bar, only **Add Campaign** button is enabled. Campaign grid is displayed below the menu bar.

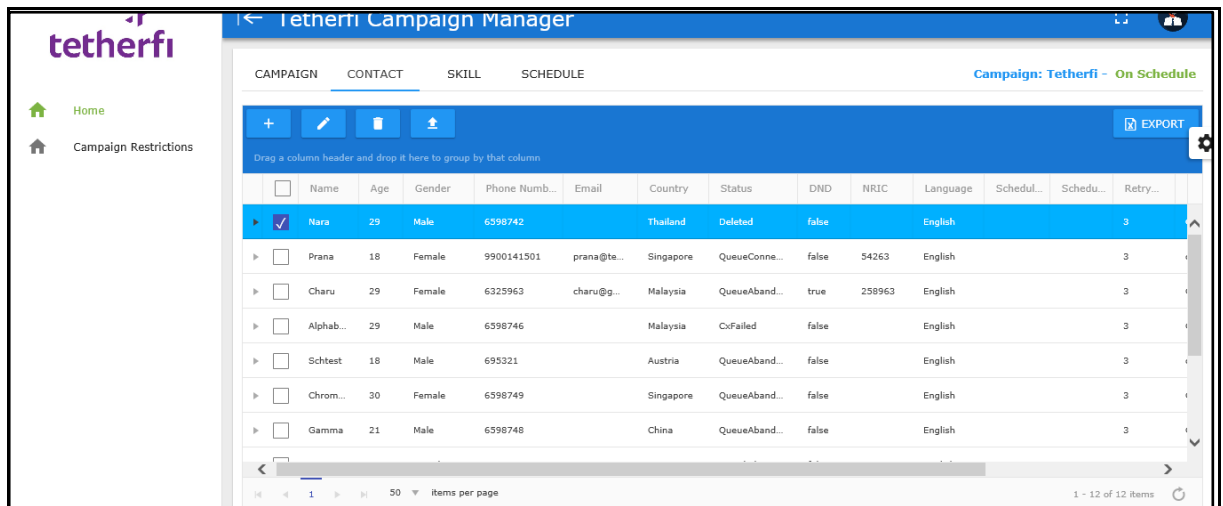


Figure 3.1 – Default Home Menu

4. Campaign Restrictions

About Campaign Restrictions

Campaign Restrictions is a menu feature provided to manage the 'Do Not Disturb' function. Through the Campaign Restriction feature, DND groups and respective DND Contacts are created and managed. This menu is provided below the Home menu on the left hand side of the main page.

Campaign Restrictions page is divided into sections. On the left hand side is the DND groups section and on the right hand side is the DND Lists section.

DND groups

In the DND groups section, DND list can be added, edited and deleted. Grid details can be exported using the Export feature.

Add DND group

Field/Button	Description
Name	Mandatory: Yes Editable: Yes Conditional display: No Prepopulated: No. name of the DND list Alert message: 'Name is required' message should be displayed when the field is left blank and add button is clicked. 'Name: <DND group name> already exists' message should be displayed when duplicate name is being added.
Status	Mandatory: Yes Editable: Yes Conditional display: No Prepopulated: No Type of field: Number counter It will be either 0 or 1. Status 0 means the DND group is disabled and 1 means enabled. Alert message: 'Status is required' message should be displayed when the field is left blank and add button is clicked.

Procedure:

1. In the left menu bar, click on **Campaign Restrictions** menu
2. click on **Add DND group** button
3. **Add DND group** pop up window opens
4. enter name and status

5. click on **Save**
6. DND group will be present in the DND group grid

5. Campaign Menu

About Campaign Menu

Campaign menu is used for creating and maintaining the campaign. Currently, only voice campaigns are available. User will be able to create, edit, delete, add DnD groups, clear the selection and export the campaigns to excel spreadsheet.

Presence on the screen: as a menu on the top menu bar within Home menu

Add Campaign:

Campaign is created using the tools present in Campaign toolbar. Added campaigns are displayed in the Campaign grid of the Campaign page.

Procedure:

7. In the top menu bar, click on **Campaign** menu
8. In the Campaign menu, click on **Add Campaign** button
9. **Add New Campaign** pop up window opens
10. Enter all the required fields
11. Click on **Add** button to add campaign or click on **Cancel** button to cancel the creation of new campaign
12. New campaign gets added to the Campaign grid on clicking the add button

Below are the attributes of a campaign:

Field/Button	Description
Campaign Name	Name of the Campaign Mandatory: Yes Editable: Yes Conditional display: No Alert message is displayed when the field is left blank. 'Name is required'
Campaign Status	Status of the Campaign Mandatory: Yes Editable: No Conditional display: No Prepopulated: Yes. New is the default status of the newly created campaign.
Campaign Type	It is a drop-down list containing different types of Campaign. Currently, only SIP campaigns are possible. Mandatory: Yes Editable: Yes Conditional display: No Drop down values: Agent SIP It is a configurable field. User can add additional channels in the TCampUI\campaign_scripts\global_vars.js file

	<p>var <code>campaignTypes</code> = [{ "text": "Agent SIP", "value": "AgentSIP" }]</p> <p>Alert message is displayed when the field is left blank. 'Campaign Type is required'</p>
Channel	<p>It is a drop-down list containing different channels available for Campaign. Currently, only Voice campaigns are possible.</p> <p>Mandatory: Yes Editable: Yes Conditional display: No Drop down values: Voice</p> <p>It is a configurable field. User can add additional channels in the TCampUI\campaign_scripts\global_vars.js file var <code>channels</code> = [{ "text": "Voice", "value": "Voice" }]</p> <p>Alert message is displayed when the field is left blank. 'Channel is required'</p>
Contact Type	<p>It is a drop-down list containing Contact Type of Campaign. Mandatory: Yes Editable: Yes Conditional display: No Drop down values: Campaign Contact</p> <p>It is a configurable field. User can add additional channels in the TCampUI\campaign_scripts\global_vars.js file var <code>contactTypes</code> = [{ "text": "Campaign Contact", "value": "CampaignContact" }]</p> <p>Alert message should be displayed when the field is left blank. 'Contact Type is required'</p>
Max Concurrent Calls	<p>Maximum number of calls that can be dialled out simultaneously from a campaign. Mandatory: Yes Editable: Yes Conditional display: No</p> <p>Alert message should be displayed when the field is left blank. 'Max concurrent calls is required'</p>
Dial Prefix	<p>Dial out code/trunk prefix Mandatory: No Editable: Yes Conditional display: No</p>
Intent	<p>Intent of the Campaign Mandatory: Yes Editable: Yes Conditional display: No</p>
Forever	<p>A checkbox, if it is checked, campaign will run forever. It will override the schedule that is created for the campaign. Mandatory: No Editable: Yes Conditional display: No</p>
Wait Time Before Dial(s)	<p>Time between Agent and Contact conferencing after the Agent is connected to the call. Mandatory: Yes Editable: Yes Conditional display: No</p>

	Alert message should be displayed when the field is left blank. 'Wait Time Before Dial is required'
Max Concurrent Calls	Maximum number of calls that can be made simultaneously for a campaign. Mandatory: Yes Editable: Yes Conditional display: No Alert message should be displayed when the field is left blank. 'Max concurrent calls is required'
Dynamic Contact Data fields	This field is used to create dynamic contact fields. These fields will be displayed for every contact of the campaign. Supervisor has to upload the contact's details in the same order as available in the campaign. Mandatory: No Editable: Yes Conditional display: No 2 text fields are available. First text field should be used to add the dynamic contact fields using the '+' button on the right side of the field. Alert messages: 'Item added to the list' message should be displayed when an item is added. 'Item already exists' message should be displayed when a duplicate item is added. 'Please provide the dynamic field name' message should be displayed when the field is left blank and '+' is clicked to add the item. Second field should have the added contact fields in drop down list. Values from the drop down list can be deleted using the delete icon on the right hand side of the drop down field. First entered value should be deleted first from the list. Alert messages: 'No item to delete' message should be displayed when the 'delete' icon is clicked at empty list
Direct Agent	A checkbox, if it is checked, . Mandatory: No Editable: Yes Conditional display: No
Retry Count	Maximum number of calls that can be made for a contact in a campaign. First call is counted as retry 1 and 1 st callback is counted as retry 2. By default, all the uploaded contacts of a campaign will have this as the retry count. Mandatory: Yes Editable: Yes Conditional display: No Alert message should be displayed when the field is left blank. 'Retry Count is required'
Screen Pop Type	display of campaign section in TMAC Auto populated drop-down list with values: Pop, iFrame Mandatory: Yes Editable: Yes Conditional display: No

	<p>It is a configurable field TCampUI\campaign_scripts\global_vars.js file var screenpopTypes = [{ "text": "Iframe", "value": "Iframe" }, { "text": "Pop", "value": "Pop" } </p> <p>Alert message should be displayed when the field is left blank. 'Screenpop Type is required'</p>
<p>Screen Pop URL</p>	<p>URL of the campaign section in TMAC. Auto populated drop-down list with configured values. Mandatory: Yes Editable: Yes Conditional display: No</p> <p>It is a configurable field. TCampUI\campaign_scripts\global_vars.js file var screenpopUrls = [{ "text": "Default", "value": "url" }, </p> <p>Alert message should be displayed when the field is left blank. 'Screenpop URL is required'</p>

Add new campaign
✕

Campaign Name *

Campaign Status

Campaign Type *

Channel *

Contact Type *

Max Concurrent Calls *

Dial Prefix

Intent *

Forever

Wait Time Before Dial(s) *

Dynamic Contact Data Fields +

✖

Direct Agent

Retry Count *

Pop Type *

Pop URL *

⊘ CANCEL ✓ ADD

Figure 5.1 – Add New Campaign

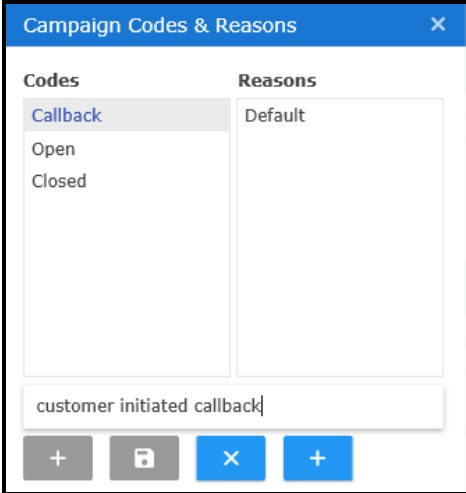

Campaign Grid

All Campaigns are available in the Campaign grid. It is a view page which has all the details added while creating a campaign. Field values remain same as that while creating the Campaign expect for the fields mentioned below.

Column Name	Description
Play	Newly created campaign will be New status. To run the campaign, campaign should be in Active status. This button is used to change the status to Active .

Pause	It is button to change the status of the campaign from Active to Paused .
Campaign Name	Name of the Campaign provided while creating the campaign
Campaign Status	<p>Status of the Campaign provided while creating the campaign.</p> <p>Status of the Campaign changes to below statuses 'New' – It is the status of the newly created campaign. Status remains 'New' till the Campaign is played. Active - Campaign status changes to 'Active' when the Campaign is played using the Play button available for the Campaign in the Campaign Grid. Paused - Campaign status changes to 'Paused' when the Campaign is paused using the Pause button available for the Campaign in the Campaign Grid. Deleted - Campaign status changes to 'Deleted' when the Campaign is deleted using the Delete button available in the Campaign menu bar.</p>
Campaign Type	value is same as that entered when the Campaign was created
Channel	value is same as that entered when the Campaign was created
Contact Type	value is same as that entered when the Campaign was created
Contact Counts	Count of the contacts for different call status
Intent	value is same as that entered when the Campaign was created
Forever	<p>True - if checkbox is checked while creating/editing the campaign False – if checkbox is unchecked while creating/editing the campaign</p>
Details	<p>It is a button on click of which Campaign details pop up window will be displayed. Certain attributes of a campaign that are provided while creating the campaign are not displayed as separate columns. They are displayed in the Campaign details pop up window.</p> <p>Below are the attributes that are displayed.</p> <ol style="list-style-type: none"> 1. Max concurrent calls 2. Wait time before dial(s) 3. Dial prefix 4. Dynamic contact data fields 5. Screen pop type 6. Retry count 7. Direct Agent 8. Screen pop url

<p>Codes and Reasons</p>	<p>It is a button. On click of Open Codes and Reasons button, 'Campaign Codes and Reasons' window is displayed.</p> <p>It has two sections. Codes on the left hand side and Reasons on the right hand side. A text field is available below these two section. By default, 'Add status code' is the placeholder text. 'Add Status Code', 'Update Status code', 'Clear All' and 'Add Reason Code' are the buttons below the text field.</p> <p>By default, 'Add Status Code', and 'Clear All' buttons will be enabled.</p> <p>Add status code: Status Code is added using the Add Status Code button.</p> <ol style="list-style-type: none"> 1. Enter the status code to be added in the text field. 2. Click on Add status code button 3. Status code will get added to the Codes section <p>Update status code: Status Code will be updated using the Update Status Code button.</p> <ol style="list-style-type: none"> 1. Select the status code to be edited from the Codes section 2. Selected status code gets highlighted 3. Add Status Code button is disabled and Update Status code, Clear All and Add Reason Code are enabled. 4. Update the code in the Edit status code or Add reason code text field 5. Click on Update status code button 6. Selected 'Status code' should get updated in the 'Codes' section <p>Clear All: Selections made in the 'Codes' and 'Reasons' section will get cleared and the buttons will be in the default status.</p> <p>Add Code Reason: Status Code Reason will be added to the selected Code using this button.</p> <ol style="list-style-type: none"> 1. Select the status code from the Codes section to which reason has to be added 2. Selected status code gets highlighted 3. Add Status Code button is disabled and Update Status code, Clear All and Add Code Reason are enabled.
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	<p>4. Add the code reason in the Edit status code or Add reason code text field</p>  <p>5. Click on Add Code Reason button</p> <p>6. Do you want to add code reason for the status code '<i>selected status code</i>'? message will be displayed</p>  <p>7. Confirm the addition of code reason by clicking on OK.</p> <p>8. Selected 'Status code' will have the 'Reason' section with the added Code Reason.</p> <p>Edit Code Reason:</p> <ol style="list-style-type: none"> 1. Select the Status Code and it's Reason from the 'Codes' and 'Reasons' section which reason has to be edited 2. Selected status code and reason gets highlighted 3. Add Status Code' and 'Add Code Reason' button will be disabled and 'Update Reason' and 'Clear All' are enabled. 4. Edit the code reason in the 'Edit code reason' text field 5. Click on Update Reason button 6. Selected Code Reason will have the 'Reason' section with the updated Code Reason.
<p>Last Changed by</p>	<p>Domain and user name of the user who last made changes to the campaign</p>
<p>Last Changed by</p>	<p>Date and time of the last change made to the Campaign. Date is of the format yyyy/mm/dd and time format is hh:mm:ss</p>

play	Pa...	Campaign Na...	Campaign...	Campaign...	Cha...	Contact Type	Contact Counts	Intent ↓	Fore...	Details	C & R	Last Chan...	Last Chan...
▶		Tetherfi	Active	AgentSIP	📞	CampaignCont...	Open - 7 CxFailed - 8 Deleted - 1 Open - 3 QueueAbandoned - 4	Demo	false	▼	🔗	WIN-CJ7BRGAEL3P	2019/04/10 09:54:26
▶		Tetherfi_Recall1	New	AgentSIP	📞	CampaignCont...		Demo	false	▼	🔗	WIN-CJ7BRGAEL3P	2019/04/16 18:09:08
▶		AMCampaign	New	AgentSIP	📞	CampaignCont...		Demo	false	▼	🔗	WIN-CJ7BRGAEL3P	2019/04/09 11:00:06
▶		DSTADD	New	AgentSIP	📞	CampaignCont...	Deleted - 1 Open - 1	Defense	false	▼	🔗		2018/10/31 12:24:19
▶		DSTA_TestCa...	Active	AgentSIP	📞	CampaignCont...	CxDialing - 1 CxDisconnected - 2 CxFailed - 8 CxRinging - 1 Deleted - 10 Expired - 11 InvalidNumber - 1 RetryExceeded - 5	Defence	true	▼	🔗		2018/10/30 07:47:37
▶		AmyTest1	Active	AgentSIP	📞	CampaignCont...	QueueDropped - 4	cheque	false	▼	🔗	system	2018/10/09 16:16:34

Figure 5.2 – Campaign grid

Edit Campaign:

Every Campaign created can be edited. To edit a campaign, it has to be in **Paused** status.

Procedure:

1. In the top menu bar, click on **Campaign** menu
2. Select the campaign to be edited from campaign grid
3. Click on **Pause** button if the campaign status is **Active**
4. click on **Edit Campaign** button
5. **Edit Campaign** pop up window opens. It will contain all the field values which were entered while creating the Campaign.
6. Edit the required fields
7. Click on **Update** button to update campaign or click on **Cancel** button to cancel the updation
8. Updated campaign is displayed in the Campaign Grid

Edit campaign [X]

Campaign Name * Tetherfi_Recall1

Campaign Status New

Campaign Type * Agent SIP ▼

Channel * Voice ▼

Contact Type * Campaign Cont... ▼

Max Concurrent Calls * 5 ▲▼

Dial Prefix 65

Intent * Demo

Forever

Wait Time Before Dial(s) * 10

Dynamic Contact Data Fields +

Marital status ▼

Direct Agent

Retry Count * 3 ▲▼

Pop Type * Iframe ▼

Pop URL * Tetherfi_Tes' ▼

CANCEL UPDATE

Figure 5.3 – Edit Campaign

Delete Campaign:

Every campaign that is created can be deleted.

Procedure:

1. In the top menu bar, click on **Campaign** menu
2. Select the campaign to be deleted from campaign grid
3. Click on **Delete** button in the toolbar
4. confirmation pop up window opens up with the message 'Do you want to delete the campaign 'Campaign <Campaign name>'?'.

5. **'Cancel'** and **'OK'** buttons are provided at the bottom right of the window.
6. On click of **'Cancel'** button, the campaign retains its previous status.
7. On click of **'OK'** button, status of the Campaign changes to Deleted.
8. Campaign status in the campaign grid changes to **'Deleted'**.

Features of a Deleted Campaign:

- No action can be performed on the deleted Campaign. On selecting the deleted campaign from the grid, an alert message **'This is a deleted Campaign'** is displayed to indicate that Campaign is not available for any changes.
- Other than the '+' Add Campaign button, rest of the buttons on the Campaign tool bar should be disabled.
- In the main menu bar, only 'Campaign' tab is enabled and rest of the tabs are disabled.
- Campaigns which are in 'New' and 'Paused' status can be deleted. When user tries to delete an active status campaign, an alert message **'Cannot delete active Campaign'** is displayed.
- An alert message, **'Cannot play deleted campaign'** is displayed when the user tries to play the deleted campaign.
- An alert message, **'Cannot pause deleted campaign'** is displayed when the user tries to pause the deleted campaign.

Add DND:

Do not disturb groups can be added to each campaign. Contacts which are in the 'DnD group' will not be contacted for the respective campaign as the DND status is True for these contacts. Using the 'Add DnD' button, multiple DnD groups can be added to each Campaign.

Procedure:

1. Select the Campaign from the Campaign grid
2. click on the **Add DND** button.
3. **DnD Groups** pop up window opens.
4. All the DnD groups that are enabled are present in the **DnD Groups** section on the left hand side of the window.
5. **Transfer to** button is available between **DND groups** list and **Selected DND groups** list
6. Select a DnD group and click on **Transfer to** button. Selected DnD group will be available in the 'Selected DnD groups' section on the right hand side of the window.

Delete DND:

DND groups can be deleted from the Selected Groups list. Contacts of such deleted DNDs have to be manually

Procedure:

1. Select the Campaign from the Campaign grid
2. click on the **Add DND** button.
3. DND groups are already present in the **Selected DND groups** list
4. Select the DND group from the **Selected DND groups** list that has to be deleted for a campaign
5. Click on the **Delete** button on the right side of the selected DND group
6. **Mapped DND successfully removed** message will be displayed.
7. DND group will not be present in the **Selected DND groups** list.

DND group after being added to the 'Select DND groups' list can get disabled in the Campaign Restrictions menu. In such a case, the DND group in the 'Select DND groups' list will be in Red.

Clear Selected

This feature is used to clear the selected Campaign in the Campaign Grid.

Procedure:

1. Select the Campaign from the Campaign grid
2. click on the **Clear Selected** button.
3. Other than the + add campaign button, rest of the buttons in the Campaign menu bar are disabled.
4. In the main menu bar, only **Campaign** tab will be enabled and rest of the tabs are disabled.

Export

Campaign grid contents can be exported to an .xlsx file using the 'Export' button. All the pages and columns in the campaign grid will get exported. Campaigns get exported in the same sort order as in the Campaign grid at that moment.

6. Contact Menu

About Contact Menu

Contact menu is used for creating and maintaining the Contacts of the Campaign. User will be able to create, edit, delete, upload contacts and export the contacts to spreadsheet.

Actions that can be performed from the Contact are Add Contact, Edit Contact, Delete Contact and Upload CSV. Export function is also provided.

Add Contact

A new Contact is created using the Add Contact button present in the contact menu bar. Contact can also be uploaded using the .CSV file upload template.

Let us add the contact through the add contact form from UI.

Procedure:

1. In the top menu bar, click on **Campaign** menu
2. Select the campaign from the Campaign grid
3. Click on the Contact tab
4. Click on the + button in the contact menu bar
5. Add Contact pop up window is displayed
6. Enter the required details and click on Save
7. Added contact will be displayed in the Contact grid

The screenshot shows a modal window titled "Add new contact" with a close button (X) in the top right corner. The form contains the following fields and values:

- Campaign Name: Tetherfi
- Channel: Voice
- Name *: Prana
- Age: 18
- Gender: Female
- Phone Number *: 9900141501
- Email: prana@tetherfi.com
- Country: Singapore
- DND:
- NRIC: 54263
- Language: English
- Scheduled Agent: (empty dropdown)
- Retry Count *: 3

At the bottom of the form, there are two buttons: "CANCEL" with a greyed-out icon and "ADD" with a blue checkmark icon.

Figure 6.1 – Add New Contact

Below table has the details of the contact form fields.

Field/Button	Description
Campaign Name	Mandatory: Yes Editable: No Conditional display: No Prepopulated: Yes. Type of field: Text name of the Campaign which should be same as the selected Campaign in Campaign grid
Channel	Mandatory: Yes Editable: No Conditional display: No Prepopulated: Yes. Type of field: Text Channel which should be same as the selected Channel in Campaign grid.
Name	Mandatory: Yes Editable: Yes Conditional display: No Prepopulated: No Type of field: Text Contact Name will be provided in this field. Alert message:

	'Name is required' message should be displayed when the field is left blank and add button is clicked.
Age	Mandatory: No Editable: Yes Conditional display: No Prepopulated: No Type of field: counter Age of the contact will be provided in this field.
Gender	Mandatory: No Editable: Yes Conditional display: No Prepopulated: No Type of field: drop down Gender of the contact will be provided in this field.
Phone Number	Mandatory: Yes Editable: Yes Conditional display: No Prepopulated: No Type of field: Text Contact Phone Number should be provided in this field. Alert message: 'Phone Number is required' message should be displayed when the field is left blank and add button is clicked.
Email	Mandatory: No Editable: Yes Conditional display: No Prepopulated: No Type of field: Text email of the contact will be provided in this field.
Country	Mandatory: No Editable: Yes Conditional display: No Prepopulated: No Type of field: drop down Displays all the countries
DND	Mandatory: No Editable: Yes Conditional display: No Prepopulated: No Type of field: Checkbox DND checkbox checked – contact will be marked as True and calls cannot be dialled out for this contact DND checkbox unchecked – contact will be marked as False and calls will be dialled out for this contact
NRIC	Mandatory: No Editable: Yes Conditional display: No Prepopulated: No Type of field: text NRIC of the contact will be provided in this field.
Language	Mandatory: No Editable: Yes Conditional display: No Prepopulated: Yes Type of field: text By default the language is English
Scheduled Agent	Mandatory: No Editable: Yes Conditional display: No Prepopulated: No Type of field: drop down list Lists all the logged in agents in TMAC application. Agents will have to have the skill of the campaign to be displayed here.
Scheduled Time	Mandatory: Yes Editable: Yes Conditional display: Yes Prepopulated: No Type of field: text

	It will be displayed only when an agent is selected in the Scheduled agent drop down field. It is of the format yyyy/mm/dd hh:mm:ss
Retry count	Mandatory: Yes Editable: Yes Conditional display: No Prepopulated: No Type of field: drop down list Alert message: 'Retry Count is required' message should be displayed when the field is left blank and add button is clicked.
Add	It is button. On click of this button, contact gets added and will be available in the contact grid.
Cancel	It is button. On click of this button, contact does not get added and will not be available in the contact grid.

Adding contact through file upload:

Bulk upload feature is provided to upload contacts. This is generally used when there is huge volume of contacts to be uploaded. Contact details will be provided in CSV file and uploaded. No other file extensions are accepted.

Procedure:

1. Enter the data in the .csv file format provided
2. Click on **Upload CSV** button
3. Select the file to be uploaded and click on **Upload** button

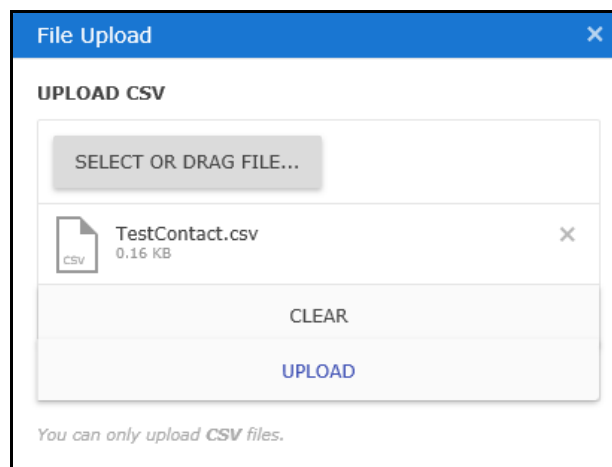


Figure 6.2 – Upload contacts through csv file

Let us see the values that can be provided for each of the columns in the csv file.

First 9 columns are dedicated to standard fields and columns from then on are dynamic fields. Dynamic fields have to be in the same order entered while creating the campaign.

Attaching the standard contact upload template. You have to use this template and file format.



ContactTemplate.csv
v

Column	Column Name	Input
A	Name	Mandatory: Yes Type of data: alphanumeric
B	Age	Mandatory: No Type of data: numeric
C	Gender	Mandatory: No Enter the values that are configured for this field. Male and Female are configured by default.
D	Phone Number	Mandatory: No Type of data: numeric
E	email	Mandatory: No
F	country	Mandatory: No
G	isDND	Mandatory: Yes Values: True or False
H	nric	Mandatory: No
I	Language	Mandatory: No English is the only language that is accepted now
J to n	Dynamic fields	Mandatory: No

There are many errors that are displayed if the expected input is not provided in the data columns. Below is the list of such error messages along with the conditions that result in the errors.

Condition	Error Message
Number of columns of the .csv file and the contact grid columns do not match	Number of csv columns do not match database columns.
Leave all the columns blank	Error in uploading contacts
Leave the name column blank	Name is not available in line <row having the issue>

Leave the phone number column blank	Phone number is not available for the contact name: <i><actual contact name></i> in line <i><row having the issue></i>
Enter the same name and same phone number combination	Name : <i><name></i> and Phone number : <i><phone number></i> already exists in database
Enter non numeric values in the phone number	Invalid Phone number: <i><entered value></i> in line: <i><row having the issue></i>
Leave the ISDND column blank	Invalid DND value in Line : <i><row number having the issue></i>

Contact Grid

Contacts that are added for a campaign will be displayed in the contact grid. By default, latest added contact will be displayed first in the contact grid.

Field/Button	Description
Expand button	On click of this button, contact call details are displayed.
Checkbox	Check this box to open an edit contact form for a contact
Name, Age, Gender, Phone Number, Email, country, DND, NRIC, Language	These are the standard fields of a contact. They will have the value that is provided while adding the contact.
Status	<p>displays the latest call status for the latest call.</p> <p>Different statuses are:</p> <ol style="list-style-type: none"> 1. Open: 2. Queuedialing 3. Queueconnected 4. Queueabandoned 5. Queuefailed 6. queuedropped 7. Agentconnected 8. Agentdisconnected 9. Cxdialled 10. Cxringing 11. Cxconnected 12. Cxfailed 13. Retryexceeded 14. Exception 15. Expired 16. Deleted 17. DACaccepted 18. DACrequesttiemout 19. DACrejected

Scheduled Agent	This field will be blank if there is no value provided while creating or editing the contact. For a callback contact, it will have the direct agent's Agent ID. If the callback is rescheduled by the supervisor to another agent other than the Direct agent then scheduled agent's Agent ID will be displayed.
Scheduled Time	This field will be blank if there is no value provided while creating or editing the contact. For a callback contact, it will have the rescheduled date and time. If the callback is rescheduled by the supervisor to another time then the
Retry Count	displays the Retry Count of the Contact entered while creating or editing the Contact
Source	
Last changed by	displays the domain and user name of the user who last change made change to the contact
Last changed on	Displays the last change date and time made to the contact

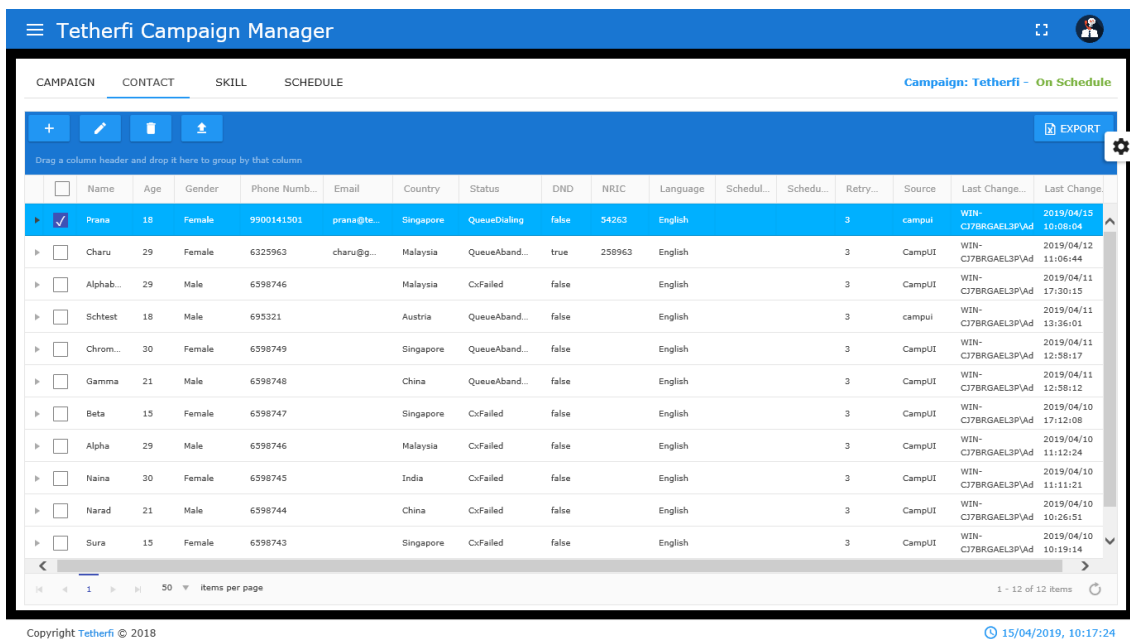


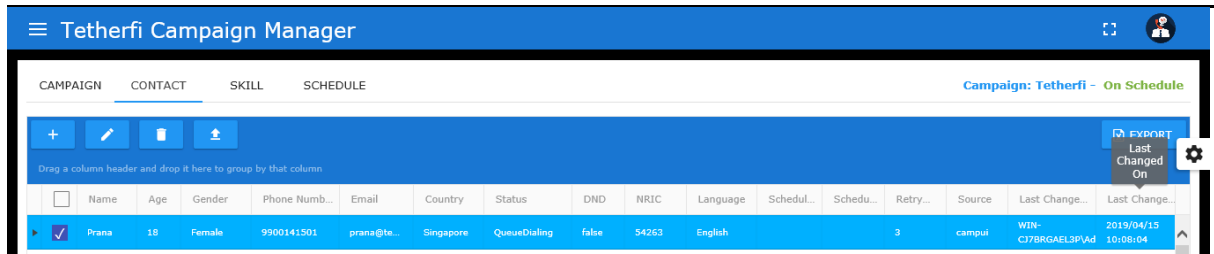
Figure 6.3 – Contact Grid

Edit Contact

Contact can be edited using the Edit Contact button present in the contact menu bar.

Procedure:

1. In the top menu bar, click on **Campaign** menu
2. Select the campaign from the Campaign grid
3. Click on the Contact tab
4. Select the contact to be edited. All the fields that were available while creating the contact should be available while editing as well.



5. Make the required changes and click on Update button

Edit contact
✕

Campaign Name

Channel

Name *

Age

Gender

Phone Number *

Email

Country

DND

NRIC

Language

Scheduled Agent

Retry Count *

⊘ CANCEL
✔ UPDATE

Figure 6.4 – Edit Contact

6. Edited contact will be updated in the grid

Below are the fields of the edit contact form.

Field/Button	Description
Campaign Name	Mandatory: Yes Editable: No Conditional display: No Prepopulated: Yes. Type of field: Text name of the Campaign which should be same as the selected Campaign in Campaign grid
Channel	Mandatory: Yes Editable: No Conditional display: No Prepopulated: Yes. Type of field: Text Channel which should be same as the selected Channel in Campaign grid.
Name	Mandatory: Yes Editable: Yes Conditional display: No Prepopulated: Yes Type of field: Text Contact Name provided while adding the contact will be displayed. Alert message: 'Name is required' message should be displayed when the field is left blank and add button is clicked.
Age	Mandatory: No Editable: Yes Conditional display: No Prepopulated: Yes Type of field: counter Contact Age provided while adding the contact will be displayed.
Gender	Mandatory: No Editable: Yes Conditional display: No Prepopulated: Yes Type of field: drop down Gender of the contact provided while adding the contact will be displayed.
Phone Number	Mandatory: Yes Editable: Yes Conditional display: No Prepopulated: Yes Type of field: Text Contact Phone Number provided while adding the contact will be displayed. Alert message: 'Phone Number is required' message should be displayed when the field is left blank and add button is clicked.
Email	Mandatory: No Editable: Yes Conditional display: No Prepopulated: Yes Type of field: Text email of the contact provided while adding the contact will be displayed.
Country	Mandatory: No Editable: Yes Conditional display: No Prepopulated: Yes Type of field: drop down Displays all the countries

DND	<p>Mandatory: No Editable: Yes Conditional display: No Prepopulated: Yes Type of field: Checkbox</p> <p>It will be checked or unchecked based on the input provided while creating the contact.</p>
NRIC	<p>Mandatory: No Editable: Yes Conditional display: No Prepopulated: Yes Type of field: text</p> <p>NRIC of the contact provided while adding the contact will be displayed.</p>
Language	<p>Mandatory: No Editable: Yes Conditional display: No Prepopulated: Yes Type of field: text</p> <p>By default the language is English</p>
Scheduled Agent	<p>Mandatory: No Editable: Yes Conditional display: No Prepopulated: No Type of field: drop down list</p> <p>Lists all the logged in agents in TMAC application. Agents will have to have the skill of the campaign to be displayed here.</p> <p>If the callback is scheduled and Direct Agent is logged off then this field will be blank and it will have the list of all the logged in agents with the campaign skill. Otherwise the Direct agent will be displayed by default.</p>
Scheduled Time	<p>Mandatory: Yes Editable: Yes Conditional display: Yes Prepopulated: No Type of field: text</p> <p>It will be displayed only when an agent is selected in the Scheduled agent drop down field. It is of the format yyyy/mm/dd hh:mm:ss</p> <p>For a callback contact, scheduled time will be the callback time provided by the Agent while submitting the callback. This time can be edited.</p>
Retry count	<p>Mandatory: Yes Editable: No Conditional display: No Prepopulated: No Type of field: drop down list</p> <p>Retry count provided while adding the contact will be displayed.</p>
Update	<p>It is button. On click of this button, contact gets updated and will be available in the contact grid.</p>
Cancel	<p>It is button. On click of this button, contact does not get added and will not be available in the contact grid.</p>

Delete Contact:

Every Contact that is created can be deleted.

Procedure:

1. Select a Contact that must be deleted from the Contact Grid.
2. On click of the **Delete Contact** button, a pop up window opens up with the message **'Do you want to delete the selected contact?'**

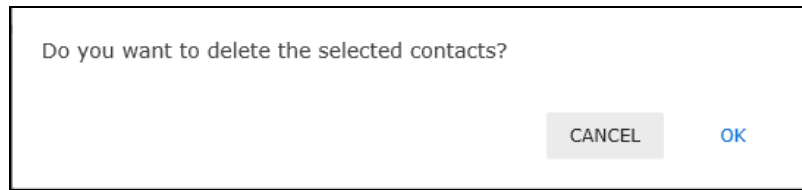


Figure 6.5 – Delete Contact confirmation pop up

3. **Cancel** and **OK** buttons are provided at the bottom right of the window.
4. On click of **Cancel** button, the contact retains its previous status.
5. On click of **OK** button, status of the Contact changes to Deleted and toaster **'Contact successfully deleted'** is displayed.
6. Contact status in the Contact grid will get updated to **Deleted**.

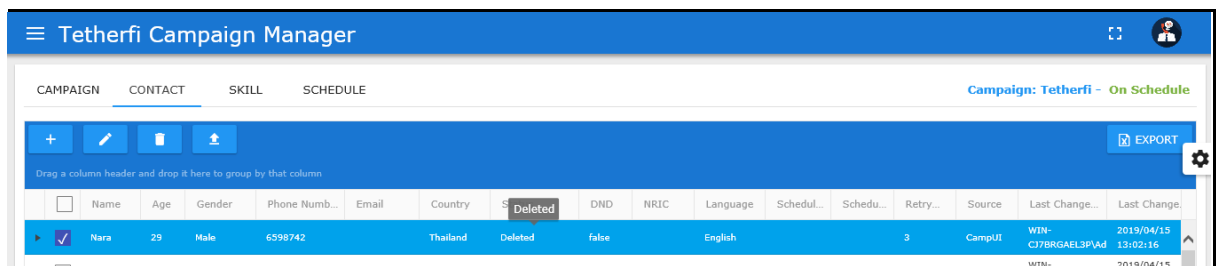


Figure 6.6 – Deleted Contact present in Contact grid

7. Multiple contacts can be deleted simultaneously by using the 'Check all' button. All the contacts get deleted, status changes to deleted and the **last changed on'** column gets updated to the time the contact was deleted. If there are contacts which are already deleted then those contacts' 'Last changed on' will not be changed.

7. Skill Menu

About Skill

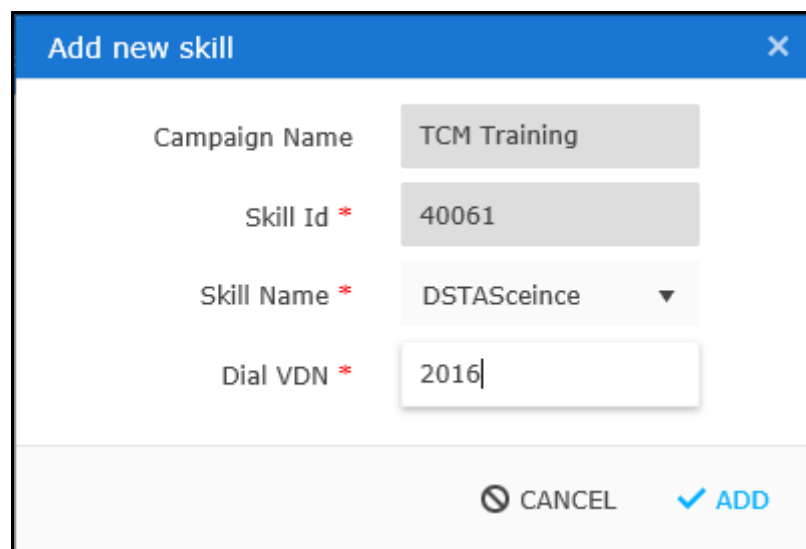
Every campaign has to have a skill. Agents who are having this skill will receive campaign call provided they are available. Let us see how a skill can be added to a campaign.

Add Skill

Skill related to the Campaign is added through the Skill feature provided in the main tabs. Skill can be added and edited using these buttons.

Procedure:

1. Select the Campaign from the Campaign grid and click on **Skill** menu.
2. Skill page is displayed. Select the skill to be updated.
3. Click on **Add Skill** button. **Add new skill** pop up window opens.
4. Select **Skill Name** from the drop down. **Skill ID** will be automatically populated.
5. Enter the **Dial VDN**
6. click on **Add** button provided at the bottom right of the window.
7. Skill gets added to the Campaign and can be seen in the **Skill grid**.



Campaign Name	TCM Training
Skill Id *	40061
Skill Name *	DSTASceince ▼
Dial VDN *	2016

CANCEL ADD

Figure 7.1 – Add new skill

Field/button	Column Data Information
Campaign Name	Mandatory: Yes Editable: No Conditional display: No Prepopulated: Yes Type of field: Text Name of the selected campaign
Skill ID	Mandatory: Yes Editable: No Conditional display: No Prepopulated: No Type of field: Text Default: blank Based on the selected Skill Name, Skill ID will be populated.
Skill Name	Mandatory: Yes Editable: Yes Conditional display: No Prepopulated: No Type of field: Drop down Default: blank It will have all the skills that are created in OCM, Skill assignment module
Dial VDN	Mandatory: Yes Editable: Yes Conditional display: No Prepopulated: No Type of field: Text Default: blank It will have the Dial VDN that is assigned to the skill in CM.

Skill Grid:

It is a grid which will display the Skill that is created and edited. It is a view page of the Skill.

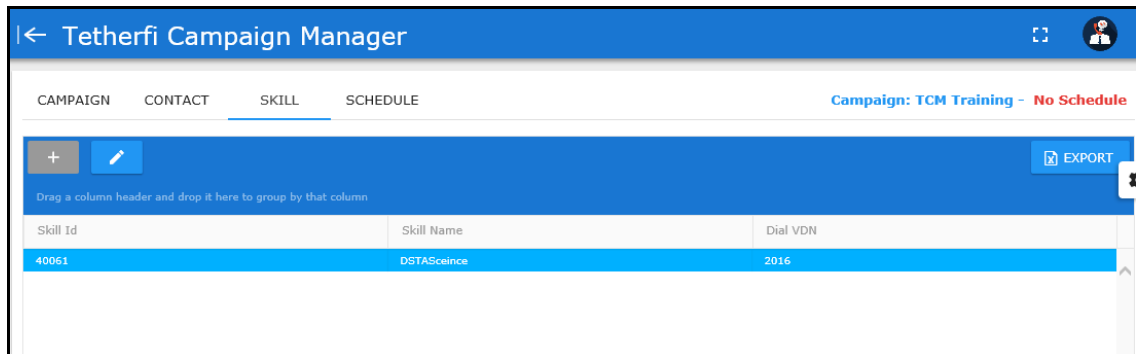


Figure 7.2 – Added skill in Skill grid

Skill Grid columns are detailed out in the below table.

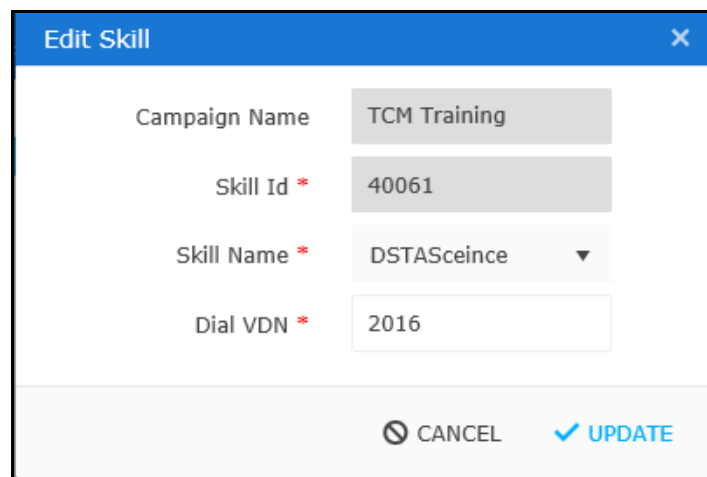
Column	Column Data Information
Skill ID	displays the skill ID of the selected skill while creating or editing the Skill
Skill Name	displays the name of the Skill entered while creating or editing the skill
Dial VDN	displays the Dial VDN of the Skill entered while creating or editing the Skill

Edit Skill

Added skill can be edited. Skill is updated using the Edit Skill feature. All the field functions remain the same as that of Add Skill feature.

Procedure:

1. Select the Campaign from the Campaign grid and click on **Skill** menu.
2. Skill page is displayed. Select the skill to be updated.
3. Click on **Edit Skill** button. **Edit Skill** pop up window opens.
4. edit all the required fields and click on **Update** button provided at the bottom right of the window.
5. Skill gets updated to the Campaign and can be seen in the **Skill grid**.



Campaign Name	TCM Training
Skill Id *	40061
Skill Name *	DSTASceince ▼
Dial VDN *	2016

Figure 7.3 – Edit skill

Delete Skill

Skill can only be updated. Skill cannot be deleted. Multiple skills cannot be added for a campaign.

Export Skill:

Skill can be exported to an .xls format file. File can be exported using the Export button present at the top right the skill grid.

8. Schedule Menu

About Schedule

Every campaign will have a schedule. It can be scheduled either by marking it **Forever** while creating/updating the Campaign or by creating a specific schedule through the **Schedule** menu.

When the Campaign is marked as Forever, it will run forever as long as the Campaign is 'Active'.

When the Campaign is not marked as 'Forever' while creating the Campaign such a Campaign should have a schedule. This schedule is created in the Schedule page.

Functions of Schedule menu:

There are two functionalities provided to manage the schedule.

1. Add a schedule
2. Edit the schedule

These two functionalities are described in detail below.

Note: A schedule cannot be deleted.

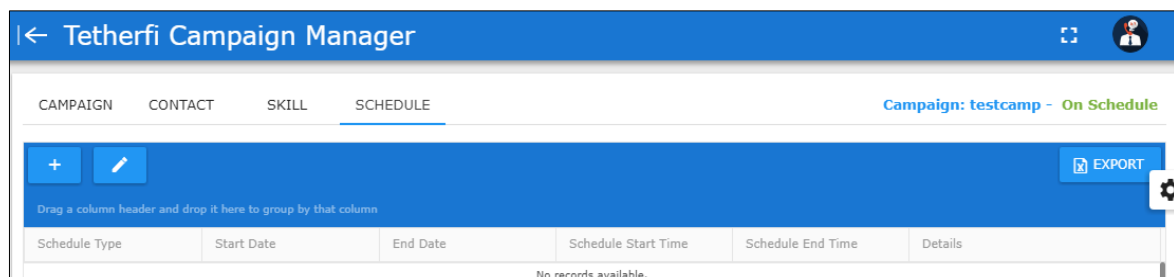


Figure 8.1- Schedule Tab

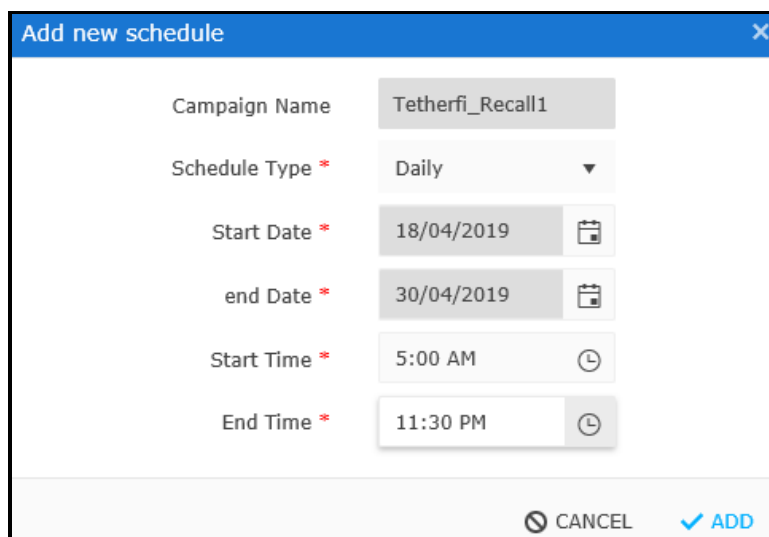
Add a schedule:

Schedule is added using the **Add Schedule** functionality.

Procedure:

1. Select the Campaign from the Campaign grid
2. Navigate to the schedule tab
3. Click on **Add** button present above the schedule grid
4. **Add New Schedule** pop up window is displayed
5. enter all the required data
6. click on **Add** button
7. new schedule is created and is displayed in the schedule grid

Properties of the Add New Schedule form:

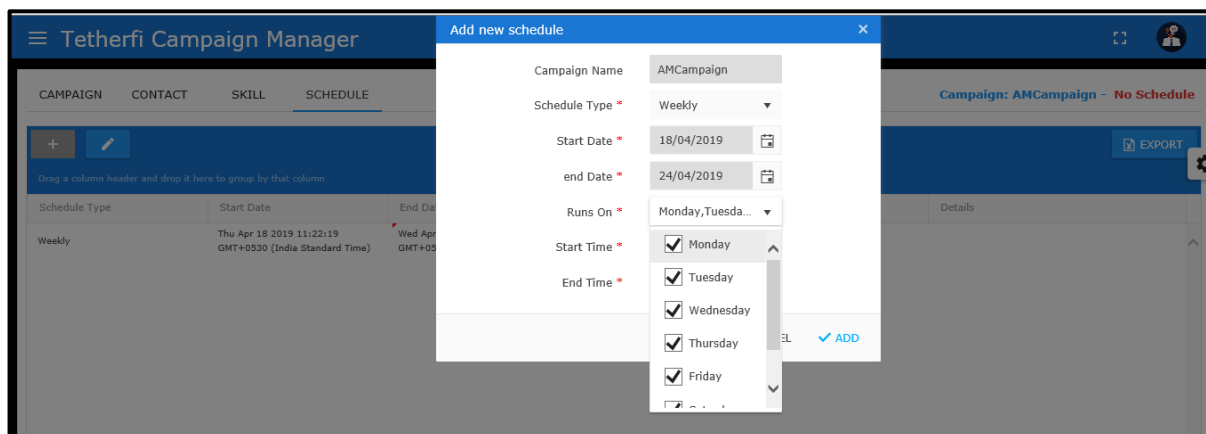


The screenshot shows a modal window titled "Add new schedule" with a close button (X) in the top right corner. The form contains the following fields:

- Campaign Name: Tetherfi_Recall1
- Schedule Type *: Daily (dropdown menu)
- Start Date *: 18/04/2019 (calendar icon)
- end Date *: 30/04/2019 (calendar icon)
- Start Time *: 5:00 AM (clock icon)
- End Time *: 11:30 PM (clock icon)

At the bottom right, there are two buttons: "CANCEL" with a circular arrow icon and "ADD" with a checkmark icon.

Figure 8.2 – Daily Schedule Type



The screenshot shows the "Add new schedule" modal window overlaid on the "Tetherfi Campaign Manager" interface. The modal form contains the following fields:

- Campaign Name: AMCampaign
- Schedule Type *: Weekly (dropdown menu)
- Start Date *: 18/04/2019 (calendar icon)
- end Date *: 24/04/2019 (calendar icon)
- Runs On *: Monday, Tuesda... (dropdown menu)
- Start Time *: Monday
- End Time *: Tuesday, Wednesday, Thursday, Friday

At the bottom right, there are two buttons: "CANCEL" and "ADD" with a checkmark icon.

Figure 8.3 – Weekly Schedule Type

Add new schedule
✕

Campaign Name

Schedule Type * ▼

Start Date *

end Date *

Runs On *

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Start Time *

End Time *

Figure 8.4 – Monthly Schedule Type

Properties	Detailed feature
<p align="center">Campaign Name</p>	<p>Mandatory: Yes Editable: No Conditional display: No Prepopulated: Yes.</p> <p>name of the Campaign will be same as the selected Campaign in Campaign grid.</p>
<p align="center">Schedule Type</p>	<p>Mandatory: Yes Editable: Yes Conditional display: No Prepopulated: No Type of field: Drop down list List values: Daily, Weekly, Monthly Schedule should run based on the value chosen from the list.</p> <p>Alert message: 'Schedule Type is required' message will be displayed when the field is left blank and add button is clicked.</p>
<p align="center">Start Date</p>	<p>Mandatory: Yes Editable: Yes Conditional display: No Prepopulated: No Type of field: Calender Start date of the campaign should be provided in this field.</p> <p>Alert message: 'Start Date is required' message will be displayed when the field is left blank and add button is clicked.</p> <p>'Selected date is a holiday, please choose other date.' Message will be displayed when there is an attempt to add the holiday as a start date.</p>
<p align="center">End Date</p>	<p>Mandatory: Yes Editable: Yes Conditional display: No Prepopulated: No Type of field: Calender End date of the campaign should be provided in this field.</p> <p>Alert message: 'End Date is required' message will be displayed when the field is left blank and add button is clicked.</p> <p>'Selected date is a holiday, please choose other date.' Message will be displayed when there is an attempt to add the holiday as a end date.</p>

<p style="text-align: center;">Runs On</p>	<p>Mandatory: Yes Editable: Yes Conditional display: Yes Prepopulated: No Type of field: Drop down list/calender</p> <p>Schedule Type: Weekly. Below list will be displayed only when the schedule type chosen is weekly. <u>List values:</u> Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday. Each of these are checkbox on the left hand side.</p> <p><u>Alert message:</u></p> <ul style="list-style-type: none"> • ‘Weekly runs on is required’ message will be displayed when the field is left blank and add button is clicked. Schedule Type chosen should be weekly. • ‘Please select atleast 7 days for weekly’ message should be displayed when the date range is less than a week. • Select a date range which is exactly a week. check a day which is a holiday and save by providing data in all other fields. Holiday day will be unchecked while being saved. <p>‘Schedule Type’: Monthly. Calendar should be displayed only when the schedule type chosen is monthly. <u>Alert message:</u></p> <ul style="list-style-type: none"> • ‘Please select dates to runs on’ message should be displayed when the field is left blank and add button is clicked. • Please select atleast 28 days for monthly message should be displayed when the date range is less than 28 days. • Dates chosen as runs on falls out of date range then the message ‘The selected days are out of range’ should be displayed.
<p style="text-align: center;">Schedule Start Time</p>	<p>Mandatory: Yes Editable: Yes Conditional display: No Prepopulated: No Type of field: clock List values: displays list of time with time starting from 12:00am with half an hour interval. Last value should be 11:55pm. It is the start time of the Campaign.</p> <p><u>Alert message:</u></p> <ul style="list-style-type: none"> • ‘Start time is required’- when the field is left blank and Add button is clicked. • ‘Start time should be greater than the current time’ – when the start time entered is past time. For eg: Start date: today’s date, End date: today’s date, Schedule start time: past time

Schedule End Time	Mandatory: Yes Editable: Yes Conditional display: No Prepopulated: No Type of field: clock List values: displays list of time with time starting from 12:00am with half an hour interval. Last value will be 11:55pm. It is the end time of the Campaign. <u>Alert message:</u> <ul style="list-style-type: none"> • 'End time is required' message will be displayed when the field is left blank and Add button is clicked. • 'End time should be greater than the start time' will be displayed when end time is less than the start time.
Add	It is a button to add the schedule
Cancel	It is a button to cancel the addition of the schedule

Edit a schedule:

Schedule is edited using the **Edit Schedule** functionality.

Procedure:

1. Select the Campaign from the Campaign grid
2. Navigate to the schedule tab
3. Select the schedule from the schedule grid
4. Click on **Edit** button present above the schedule grid
5. **Edit Schedule** pop up window is displayed
6. All the fields will have the values entered while creating the grid
7. edit the required data
8. click on **Update** button
9. selected schedule is updated and is displayed in the schedule grid

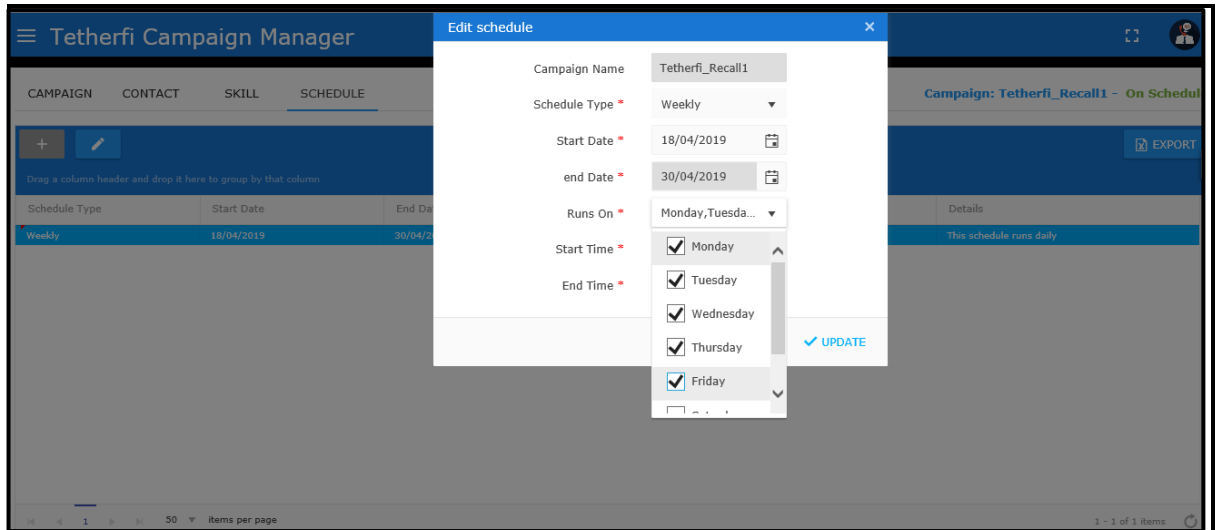


Figure 8.5 – Edit Schedule Type

Campaign schedule status:

Based on the schedule, there is change in Campaign schedule status displayed above the schedule grid.

Display on the screen: Campaign schedule status is available on the top right hand side in line with the menu.

Format of Campaign Schedule Status : Campaign: <Campaign Name> - <schedule status>

There are 5 different schedule statuses.

1. **No schedule:** this status should be achieved when 'Forever' field is unchecked while creating the Campaign and there is no specific schedule created through the schedule menu.

Edit campaign

Campaign Name * Tetherfi_Recall1

Campaign Status New

Campaign Type * Agent SIP

Channel * Voice

Contact Type * Campaign Cont...

Max Concurrent Calls * 5

Dial Prefix 65

Intent * Demo

Forever

Wait Time Before Dial(s) * 10

Dynamic Contact Data Fields

Marital status

Direct Agent

Retry Count * 3

Pop Type * Iframe

Pop URL * Tetherfi_Tesl

CANCEL UPDATE

Figure 8.6 – Campaign not Schedule: Forever unchecked

Tetherfi Campaign Manager

CAMPAIGN CONTACT SKILL SCHEDULE Campaign: Tetherfi_Recall1 - No Schedule

+ ✎ EXPORT

Drag a column header and drop it here to group by that column

Schedule Type	Start Date	End Date	Schedule Start Time	Schedule End Time	Details
No records available.					

Figure 8.7 – Campaign Status : No Schedule

2. **Off Schedule:** this status should be achieved when Campaign is off schedule.

Schedule Type	Start Date	End Date	Schedule Start Time	Schedule End Time	Details
Weekly	15/04/2019	30/04/2019	01:00 PM	11:55 PM	This schedule runs on Monday, Tuesday, Wednesday, Thursday, Friday

Figure 8.8 – Campaign Status : Off Schedule

3. **On Schedule:** this status should be achieved when
 - a. 'Forever' field is checked while creating the Campaign or
 - b. the schedule that is created through schedule menu is running for the duration that is mentioned

Schedule Type	Start Date	End Date	Schedule Start Time	Schedule End Time	Details
Weekly	01/01/2018	07/01/2018	01:00 AM	04:30 AM	This schedule runs on Tuesday

Figure 8.9 – Campaign Status : On Schedule

4. **Expired:** this status should be achieved when the schedule created through the Schedule menu has expired i.e. schedule end date and time is in past.

Schedule Type	Start Date	End Date	Schedule Start Time	Schedule End Time	Details
Daily	12/06/2018	14/06/2018	12:00 AM	11:55 PM	This schedule runs daily

Figure 8.10 – Campaign Status : Expired Schedule

5. **Pending:** this status should be achieved when the schedule that is created is yet to start.

Schedule that is created cannot be deleted. It can only be edited and updated.

9. Campaign details in TMAC

About TMAC

TMAC is a web application used by agents to attend calls, conduct the surveys and reschedule the call on request by the contact.

About Campaign details in TMAC

Contact information is displayed in TMAC so that Agents can view them during the call with the contact. These details are fetched from TCM when the call is received by the agent.

Campaign is a separate section in TMAC. On expansion of the section, connected contact's details are displayed.

There are 2 tabs in the Campaign section:

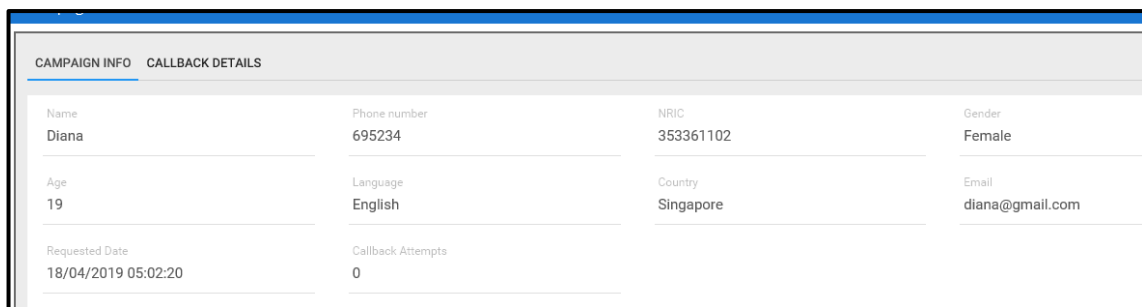
1. Campaign Info
2. Callback details

Each of the above tabs will be explained in detail.

Campaign Info

Campaign Info section has all the details of the contact who is currently connected to the agent.

All the standard fields and the dynamic fields that are added for a contact in the TCM is displayed here. Only DND field is not displayed here.



The screenshot shows a web interface with two tabs: 'CAMPAIGN INFO' (selected) and 'CALLBACK DETAILS'. Below the tabs is a table displaying contact information for a contact named Diana.

Name	Phone number	NRIC	Gender
Diana	695234	353361102	Female
Age	Language	Country	Email
19	English	Singapore	diana@gmail.com
Requested Date	Callback Attempts		
18/04/2019 05:02:20	0		

Figure 9.1- Standard Contact fields in TMAC

In the below figure, sample contact with dynamic fields are showcased. These fields are from Marital status till Identification. Since they are dynamic, each campaign can have a different set of dynamic fields. In the example considered here, below are the 12 dynamic fields.

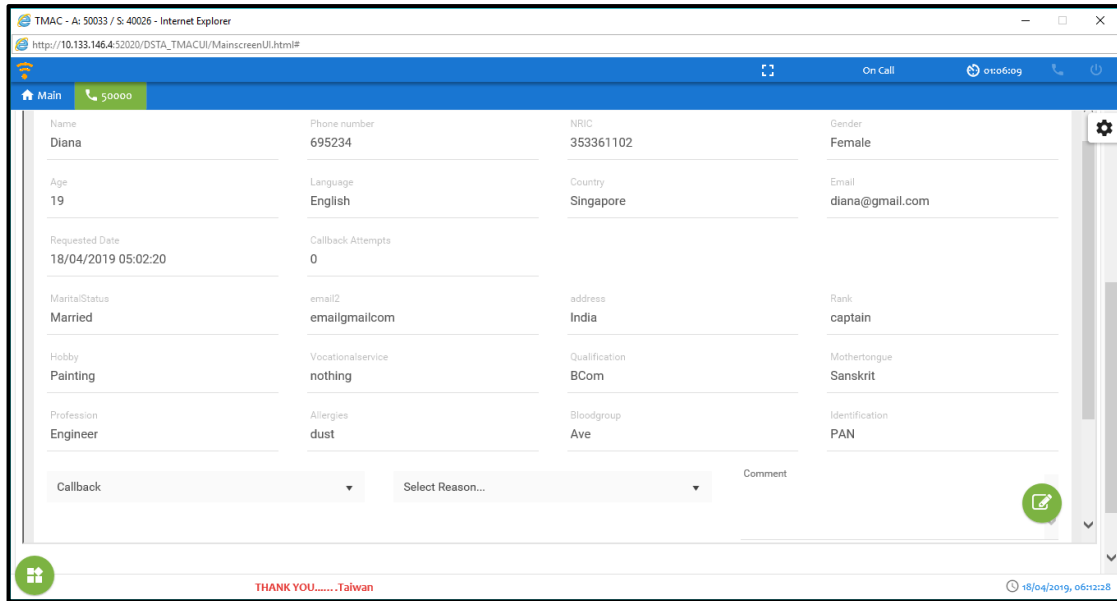


Figure 9.2- Dynamic Contact fields in TMAC

In addition to these fields, there are some more fields displayed. The details of all the fields are in below table.

Field/Button	Description
Name	Name of the Contact. Data is the same as that in Contact grid of TCM. This is a standard field. Editable: No Conditional display: No
Phone Number	Phone Number of the Contact. Data is the same as that in Contact grid of TCM. This is a standard field. Editable: No Conditional display: No
NRIC	NRIC of the Contact. Data is the same as that in Contact grid of TCM. This is a standard field. Editable: No Conditional display: No
Gender	Gender of the Contact. Data is the same as that in Contact grid of TCM. This is a standard field. Editable: No Conditional display: No
Age	Age of the Contact. Data is the same as that in Contact grid of TCM. This is a standard field. Editable: No Conditional display: No
Language	Language of the Contact. Data is the same as that in Contact grid of TCM. This is a standard field. Editable: No Conditional display: No

Country	<p>Language of the Contact. Data is the same as that in Contact grid of TCM. This is a standard field.</p> <p>Editable: No Conditional display: No</p>
Email	<p>Language of the Contact. Data is the same as that in Contact grid of TCM. This is a standard field.</p> <p>Editable: No Conditional display: No</p>
Requested Date	<p>Date and time when the call was dialled out.</p> <p>Editable: No Conditional display: No</p>
Callback Attempts	<p>It is the number of times the call is dialled out to the contact. It starts with 0. First call to the customer is counted as 0 attempt.</p> <p>Editable: No Conditional display: No</p>
Codes	<p>It is a drop down list and has codes related to the call. Data is from Codes and Reasons of the Main Campaign for the first call. For callbacks, data is from Codes and Reasons of the Recall Campaign.</p> <p>Mandatory: Yes Editable: Yes Conditional display: No</p> <p>It is a configurable field. By default, certain codes are already available for a new campaign. However, codes can be edited. Configuration file for this field: TCampUI/campaign_scripts/config.js</p>
Reasons	<p>It is a drop down list and has reasons for the selected code. Data is from Codes and Reasons of Main Campaign for the first call. For callbacks, data is from Codes and Reasons of the Recall Campaign.</p> <p>Mandatory: Yes Editable: Yes Conditional display: No</p> <p>It is a configurable field. By default, certain reasons are already available for a new campaign. However, codes and its reasons can be edited. Configuration file for this field: TCampUI/campaign_scripts/config.js</p>
Comments	<p>It is the comment provided by the agent during On call or on ACW. These comments will be available for the agent when a callback is received for the contact.</p> <p>Mandatory: No Editable: Yes Conditional display: No</p>
Reschedule Date	<p>Callback date to call the customer. It is calender function. Date range for this field is fetched from the Recall campaign's schedule.</p> <p>Holiday feature: Holidays that are entered in the IVR Hoilday module in OCM application will be disabled here. During these days, callback cannot be scheduled.</p>

	Mandatory: Yes Editable: Yes Conditional display: Yes It is displayed only when the status code is Callback .
Reschedule Time	It is the callback time to call the customer. This field fetches time slots from the Recall campaign's schedule. Mandatory: Yes Editable: Yes Conditional display: Yes It is displayed only when the status code is Callback .
Callback phone number	Mandatory: Yes Editable: Yes Conditional display: Yes It is displayed only when the status code is Callback .
Submit	It is configurable. If the configuration key is True, it will be enabled only when the call ends and agent is on ACW. Always set this as True. Configuration file for this field: TCampUI/campaign_scripts/tmac_campaign.js var <code>disableCallbackSubmitBtn</code> = true;
Clear	It is button. It clears all the editable fields that have entry.

Reschedule Call

Call is rescheduled for a contact when the contact is not able to continue the call for various different reasons.

Note: Rescheduled call is always placed in the **Recall campaign** and is a Direct Agent campaign. It is a scheduled campaign and usually does not run a **Forever** schedule.

Procedure:

1. In the TMAC application, end the call with the contact by clicking on End Call button in call action tool bar. Agent will be in ACW status.
2. Expand the Campaign section
3. select the Code as Callback and select the reason. Rescheduled Date and Time field will be displayed.
4. Select the Rescheduled Date and Time and callback phone number

Figure 9.3- Reschedule date, time and call phone number

5. Click on Submit button
6. Callback Rescheduled successfully toaster is displayed
7. In the TCM application, contact is moved to Recall campaign

	Name	Age	Gender	Phone Num...	Email	Country	Status	Det...	DND	NRIC	Language	Scheduled A...	Schedule...	Retry...	Source
	TestNew2019	18	Female	25631		Singapore	Open	▽	false	589632	English	50033	2019041...	4	campui
	Diana	19	Female	4859632	diana@gmail.com	Singapore	QueueDialing	▽	false	353361102	English	50033	2019041...	3	campui

Figure 9.4- Callback contact record in Recall campaign grid

8. In the Recall campaign, contact grid displays the Contact with the Scheduled Agent, date and Time
9. In TMAC, direct agent receives a pop up “Callback for <contact name contact number> .

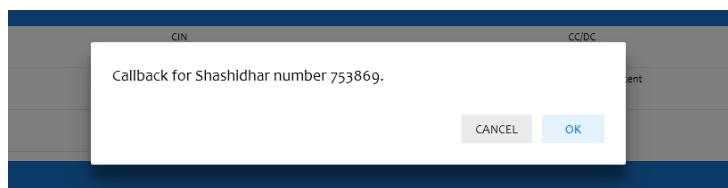


Figure 9.5- Callback pop up received by agent

10. Agent click on Ok to receive the call
11. Callback is received by the Direct Agent

10. Campaign end to end callflow

Steps to

1. In the TCM application, create a campaign
2. In campaign restrictions menu, create the DND group and add DND contact list
3. In home menu, select the campaign and click on Add DND
4. Select the DND groups and add them to the campaign
5. Click on Add contacts to the campaign
6. If the added contact is in the DND groups of the campaign, contact DND status will be True
7. To dial out to DND True contacts, edit the Contact and uncheck the DND, Contact will be dialed out
8. In TMAC, available agent auto receives the call and is connected to the contact
9. Survey window opens up with the survey that is mapped to the campaign's intent
10. With the contact's consent, call is rescheduled with the code as Callback and any reason, rescheduled date and time.
11. Rescheduled call is placed in the Recall campaign
12. Recall take place on the scheduled date and time

11.Call Routing

About call routing from TCM:

Calls are dialed out from the TCM for the contacts loaded to TCM.

Use Case: Call routing without schedule

Entry Condition: In Campaign form, uncheck **Forever** checkbox
Campaign status – Active,
Campaign schedule – No schedule
Contacts are loaded to the Contact menu

Expected behaviour: Contacts will be not dialed out from the TCM and contact status will be **Open**

Use Case: Call routing without Skill for Campaign

Entry Condition: Campaign status – Active,
Campaign schedule – On schedule
Contacts are loaded to the Contact menu
Skill – no skill added to the campaign

Expected behaviour: Contacts will be not dialed out from the TCM and contact status will be **Open**

Use Case: Call routing based on first – in first – out protocol

Entry Condition: Campaign status – Active,
Campaign schedule – Pending
Contacts are loaded to the Contact menu
Campaign Schedule changes to On schedule
Contacts are loaded to the Contact menu

Expected behaviour: Contacts that were uploaded first that is when the campaign schedule was pending should be dialled out first. Calls are dialled out based on the first-in first-out protocol.

Use Case: Call routing based on Max concurrent calls feature

Entry Condition: In Campaign form, enter the Max concurrent calls in numbers
Campaign status – Active,
Campaign schedule – On schedule
Contacts are loaded to the Contact menu

Expected behaviour:

- contacts equal to the max concurrent calls provided for a campaign are dialed out
- These contacts will move to **queue dialing** and then to **queue connected** status after they get connected to the queue in Avaya CM
- Contacts that are greater in number than the max concurrent calls number will be in Open status. These contact calls will be move to queue when the calls in queue(CIQ) move out to Agent. At any point of time CIQ for a campaign will always be equal to Max Concurrent calls for campaign.

Use case: Contact expiry time for a campaign

Entry Condition: Campaign status – Active,
 Campaign schedule – On schedule
 Contacts are loaded to the Contact menu

Configuration changes:

In TCMServer folder/ Template.config file
 <add key="ContactExpiryTime" value="tmc.conf.contactExpiryTimeInMin" />
 TCMServer/ TCAMPConfig.json file
 "tmc.conf.contactExpiryTimeInMin": "129600". Eg: setting contact expiry time to 90 days in mins.

Expected behaviour: Contacts will be in open status till the contactexpirytimeinMin condition is met. Contact status will be **Expired** if is it not dialed out within the expiry time.

Use case: Call routing for a holiday

Entry Condition: Campaign status – Active,
 Current day - holiday
 Contacts are loaded to the Contact menu

Configuration changes: None

Expected behaviour: Campaign schedule status will be changed to **Off schedule** for a holiday. Calls will not be dialed out on a holiday.

Use case: Call routing to VDN

Entry Condition: In Campaign form, enter the Max concurrent calls in numbers
 Campaign status – Active,
 Campaign schedule – On schedule
 Contacts are loaded to the Contact menu
 Campaign Skill is added

Expected behaviour: Campaign call should be routed to the VDN first and then it should be routed to the skill of the campaign

Use case: Call routing when Direct Agent is Available

Entry Condition: Agent has scheduled callback
At the scheduled time, Direct Agent is Available

Expected behaviour: Direct Agent should receive a pop up requesting for call acceptance. On accepting the call by clicking OK, Agent receives the call and call status should be **On call**.

In TCM, contact call status should have a DACaccepted

Use case: Call routing when Direct Agent is on ACW

Entry Condition: Agent has scheduled callback
At the scheduled time, Direct Agent is on ACW

Expected behaviour: *In TCM*, Direct Agent should receive a pop up requesting for call acceptance. On accepting the call by clicking OK, Agent receives the call and call status should be **ACW – On call**.

In TCM, contact call status should have a DACaccepted

Use case: Call routing when Direct Agent is On call

Entry Condition: Agent has scheduled callback
At the scheduled time, Direct Agent is busy to receive the callback
Supervisor has not scheduled the call to another agent

Expected behaviour: Campaign call should be routed to the Direct Agent first

In TCM, contact call status should have a DACaccepted

Use case: Call routing for calls already in queue and campaign expires

Entry Condition: Calls are in queue at the end of last day of campaign

Expected behaviour: On the next day of the campaign expiry, call should be routed to the Agent who has the campaign's skill and it should be received by the agent as a campaign call.

12. Generic Features

Some of the features are available across the application. Pagination, Sorting and Grouping features are available in every grid.

Pagination

Grid is provided with pagination feature at the bottom left of the grid. Items per page can be 25, 50 or 100. Based on the selection made, that many items are displayed in the grid. If the number of items are more than the chosen items per page, items are moved to the next page. Number of pages are displayed on the bottom right of the grid. It also displays the page number on which the user is currently present.

Refresh button is provided at the bottom right of the grid. Grid should be auto refreshed after every event that is related to the grid.

Sorting

Columns in the grid have a default sort order. They can also be sorted by ascending and descending order.

Grouping

All columns in the grid can be grouped and there can be sub groups created for better view.