

Campaigns

Organisation of Campaigns

Campaigns are the heart of how the dialler operates. These provide:

- The organisation of the contacts to be called, by topic or source. **Sub Campaigns** are used to organise contacts.
- The organisation of agents and on what topics they should work. **Master Campaigns** are used to organise this aspect of the dialler.

Master Campaigns

Agents log into a master campaign. A master campaign defines the following:

- The ACD group which is associated with the master campaign.
 - Agents, who are members of the associated ACD group, can log-in to the master campaign.
- How the dialler operates. There are two modes:
 - Preview dialling
 - Manual dialling / CTI
 - IVR dialling
- Active times for the master campaign

The operation of dialler modes is discussed in a separate section.

Sub Campaigns

Sub Campaigns contain the contacts to be called. Contacts are loaded into the dialer via an export / import mechanism.

The sub campaign defines the following:

- The service number, which should be transmitted, when a contact is dialled
- The language of the campaign
- The dialler behaviour, amongst other things:
 - The maximum ring time
 - Waiting time between attempts
 - The number of tries per contact
- Active times for the sub campaign
 - Calls to contacts are only initiated during active times
- Time windows for trying various telephone numbers which influence the flow of contacts through the campaign
- Result codes
- The contacts themselves

Mapping of Campaigns

A master campaign can be associated with any number of sub campaigns. A sub campaign can also be associated with any number of master campaigns.

The mapping has an associated weight. This defines the relation of contacts which will be dialled from each of the associated campaigns.

For example:

- Weight campaign A = 50
- Weight campaign B = 25
- Weight campaign C = 25

In this example, the dialler will try to call 2 contacts from campaign A for every one called from campaigns B and C.

Note: The actually dialled contacts are influenced by further factors:

- Follow up times
- Time windows
- Activation times

It is therefore not given that this relation 2:1:1 must ensue. The dialler will, however, use these weights whenever a new contact is required.

Fields

Master Campaign

Tab	Field	Description
Master Data	ID	The ID of the campaign (database ID field).
	Name	The name of the campaign.
	Master Campaign	Set, for all master campaigns.
	Test Campaign	If a campaign is set to be a test campaign, then all calls from this campaign are marked as test calls. This affects the statistics, and also requests made via APIs to the back end system.
	ACD Gruppe	The ACD group which this campaign is associated with. Only agents who are members of this ACD group can log-in to the campaign.
Dialler Parameter	Dialler Type	The dialler type, which defines how the dialler operates - manual (CTI or Manual), preview (Preview Dialling), or IVR (IVR Dialler).
	IVR Parameters	If The IVR Dialler Option is chosen, This section will appear.
	Routing Application	When contacts are reached, they are routed to the selected routing application (like in an inbound IVR).
	Parallel Lines	The system dials contacts automatically, up to this maximum number of parallel lines.
Active Times	Active	Whether the campaign is active. When campaigns are deactivated, agents cannot login to the campaign.
	Start	Start of the campaign. Before this date / time, agents cannot login to the campaign.
	End	End of the campaign. After this date / time, agents cannot login to the campaign.
	Opening Times	The campaign is only active during the specified opening times. Outside of these times, agents cannot login to the campaign.
	Holidays List	The campaign is only active when not a holiday. When a holiday, agents cannot login to the campaign.
Agent Parameters	Agent Status Manual Post Call	This is the status to which agents are moved, when they record a result code and choose the option "Save and manual post call".
	Agent Status Pause	This is the status to which agents are moved, when they record a result code and choose the option "Save and pause".

Sub-Campaigns	Mapping Table	<p>This page is used to map the sub-campaigns to the master campaign. Sub-campaigns can also be activated / deactivated on this page.</p> <p>Note: deletion of a mapping deletes the mapping only, and not the campaign itself.</p>
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Sub-Campaign

Tab	Field	Description
Master Data	ID	The ID of the campaign (database ID field).
	Name	The name of the campaign.
	Foreign System ID	The ID of the campaign in an external system is stored here. The foreign system ID is used when contacts are automatically imported via (for example) a SOAP interface or an API to identify the campaign in the jtel system. WARNING: you should not usually change this unless you know exactly what you are doing.
	Master Campaign	Not set, for all sub-campaigns.
	Servicer Number	The service number, to which the statistics are associated for this campaign. Also defines the calling party number to be signalled, if no alternative is specified below.
	Language	The language of the campaign. Used when announcements are required in the call flow.
	Caller ID Overwrite	If this option is set, the caller id will be overwritten with the specified value, when outbound calls are made.
	Caller ID	The value with which the caller id will be overwritten.

CRM URL

The CRM URL, shown to agents, when calls are connected.

The following variables can be used in the url:

Variable	Meaning
\$date_time	The current date and time in the format %Y-%m-%d %H:%i:%s
\$service_number	The service number associated with the current dialler campaign.
\$service_name	The service number name associated with the current dialler campaign.
\$caller	The number being dialled on the contact. Note - as usual with the jtel system, the variable \$caller always refers to the outside caller / called party, and never to the internal agent or service number.
\$agent_name	The name of the agent making the call.
\$agent_firstname	The first name of the agent making the call.
\$agent_number	The number of the agent making the call.
\$agent_id	The ID of the agent (UsersID) making the call.
\$agent_tel	The telephone number of the agent (currently logged into telephone) making the call.
\$agent_uid	The UID of the agent making the call.
\$group_name	The name of the ACD group associated with the dialler campaign when the call is made.
\$group_number	The number of the ACD group associated with the dialler campaign when the call is made.
\$diallercampaign_name	The name of the dialler sub-campaign which the dialler contact is in.
\$diallercontact_name	The name of the dialler contact.
\$diallercontact_firstname	The first name of the dialler contact.
\$diallercontact_external systemlink	The external system link (X-Link) saved in the dialler contact.
\$diallercontact_userdata	The user data field of the dialler contact.

Dialer Parameter	Maximum Ring Time (s)	The maximum ring time allowed, before the dialler records a "no answer" result.
	Maximum Tries per Contact	If this count of tries to reach a contact is reached, the contact is closed with the configured following result code.
	Result Code Maximum Tries Reached	The result code, with which contacts are closed, when the maximum number of tries is reached.
	Maximum Busy Tries in One Series	This parameter defines the number of consecutive busy attempts count as one attempt to reach the contact. When this count of consecutive busy signals is reached, the number of tries is increased by one, and the contact is moved to the next time window.
	Delay Time between Busy Tries in One Series (s)	This delay is used between individual tries in a busy series. The number of consecutive busy tries is increased, and the delay is applied to the contact before it is tried again.
	Delay Time between Non-Busy Call Attempts	When not reached, this delay is applied to the contact. If the contact would be moved out of the time window, then the next time window is selected.
	Result Code No More Telephone Numbers	When all numbers in a contact are invalid, this code is recorded.
	Result Code Answering Machine	If an agent is connected to an answering machine, then the answering machine button can be used, if configured, to record this result code directly.
	Prompt Automated Message on Answering Machine	When configured, an audio file can be played to an answering machine. Note: the agent should wait until the answering machine actually starts recording.
	GDPR Announcement after Agent Call	The GDPR announcement will automatically be played to callers after a successful agent call. The configured prompt should contain information on data protection and privacy.
	Close Contacts on Incoming Calls	When an incoming call is made to an associated ACD group (via the master campaign), contacts can be closed by the system when agents are reached.
	Close on Matching Caller-ID	Whether contacts should be closed when the caller ID matches.
	Close on Matching User Data	Whether contacts should be closed when the User Data field matches.
	Result Code Incoming Call	What result code should be recorded, when contacts are closed.
	Only Close on TAC Export Code Match	Setting this option causes the system to only close contacts, when the agent records a transaction code, whose export key matches those configured in the list below.
	TAC Export Keys	List of export keys, comma separated, which cause the contacts to be closed.
	Result Code IVR Connected	If the IVR dialler reaches a contact, what result code should be recorded when the call is not put through to an agent.
	Result Code Agent Connected	If the IVR dialler reaches a contact, what result code should be recorded when the call is put through to an agent.
	External System Query Active	Whether a REST query to an external system should be performed. The query is performed before dialling a contact.
	External System Query URL	The URL for the external system.

	Result Code Abort External System	The result code which should be recorded, when the call should not be placed according to the external system.
Active Times	Active	Whether the campaign is active. When campaigns are deactivated, agents cannot login to the campaign.
	Start	Start of the campaign. Before this date / time, agents cannot login to the campaign.
	End	End of the campaign. After this date / time, agents cannot login to the campaign.
	Opening Times	The campaign is only active during the specified opening times. Outside of these times, agents cannot login to the campaign.
	Holidays List	The campaign is only active when not a holiday. When a holiday, agents cannot login to the campaign.
Agent Parameters	Post Call Interval	The automatic post call time in seconds after calls via this campaign. Note: due to the recording of result codes and the operation thereof, it is not recommended that this be used in combination with preview mode.
	Contact Preview Time (s)	In preview campaigns, the number of seconds during which a dialler preview is active.
	Custom Client Field Layout	The standard field layout is 0. If the set layout is not found, the standard layout will be used.
	Release contacts after stopping dialling	When this option is selected, reserved contacts are freed and given back to the pool when the agent stops the dialler.
Time Windows	Configuration List	<p>The configuration of the time windows determines when which telephone number in the contact will be dialler. The algorithm is as follows:</p> <ul style="list-style-type: none"> • not yet dialled contacts are moved, according to the weight of the sub-campaigns, into the current time window • one try to reach the contact is made • if this is not successful, the following happens: <ul style="list-style-type: none"> ◦ either a busy series is started ◦ or the contact is delayed • For a delay, the next time window might be used, if the contact would be moved outside of the current time window. The time delay is the minimum which will be applied. • If the next time window starts at the same time or earlier than the current window, the delay will be moved to the next day <p>By defining time windows, it is possible (if the data is organised accordingly - the telephone numbers) to ring certain numbers at certain times of day. For example, if field 1 is the business phone, field 2 the mobile phone, and field 3 the home phone, it might make sense to define the following:</p> <ul style="list-style-type: none"> • Time window 1 - 08:00 bis 17:00 • Time window 2 - 08:00 bis 20:00 Uhr • Time window 3 - 17:00 bis 20:00 Uhr
Result Codes	Configuration List	This list is used to define result codes for the campaign. The global list of result codes is imported when the campaign is created. If this list is empty, a default set of result codes is created to ensure the dialler can operate.
Contacts	Configuration List	<p>This page is used to edit and delete the contacts in the campaign.</p> <p>Furthermore, contacts can be imported / exported on this page.</p>
	Configuration List - Function Reset	This function resets all intermediate counters / tries for the contact in the dialler. This function can only be used when a contact is locked.
	Configuration List - Function Lock	Locks a contact to enable further editing functions.

	Configuration List - Function Unlock	Unlocks a contact giving control back to the dialer.																																																		
	Columns	<p>Here is a description of the Contact tab columns</p> <table border="1" data-bbox="519 252 1317 1391"> <thead> <tr> <th data-bbox="519 252 721 306">Variable</th> <th data-bbox="721 252 1317 306">Meaning</th> </tr> </thead> <tbody> <tr> <td data-bbox="519 306 721 354">Campaign</td> <td data-bbox="721 306 1317 354">The name of the Dialler Sub Campaign</td> </tr> <tr> <td data-bbox="519 354 721 402">User data</td> <td data-bbox="721 354 1317 402">Foreign system key or ID.</td> </tr> <tr> <td data-bbox="519 402 721 450">Client</td> <td data-bbox="721 402 1317 450">The client.</td> </tr> <tr> <td data-bbox="519 450 721 497">Service</td> <td data-bbox="721 450 1317 497">The service.</td> </tr> <tr> <td data-bbox="519 497 721 545">Reference Number</td> <td data-bbox="721 497 1317 545">Reference Number e.g. from the foreign system.</td> </tr> <tr> <td data-bbox="519 545 721 593">Start Date</td> <td data-bbox="721 545 1317 593"></td> </tr> <tr> <td data-bbox="519 593 721 641">End Date</td> <td data-bbox="721 593 1317 641"></td> </tr> <tr> <td data-bbox="519 641 721 689">Manufacturer</td> <td data-bbox="721 641 1317 689"></td> </tr> <tr> <td data-bbox="519 689 721 737">Model</td> <td data-bbox="721 689 1317 737"></td> </tr> <tr> <td data-bbox="519 737 721 785">Tag</td> <td data-bbox="721 737 1317 785"></td> </tr> <tr> <td data-bbox="519 785 721 833">Name</td> <td data-bbox="721 785 1317 833">Name of the contact.</td> </tr> <tr> <td data-bbox="519 833 721 880">First Name</td> <td data-bbox="721 833 1317 880">First Name of the contact.</td> </tr> <tr> <td data-bbox="519 880 721 928">Company</td> <td data-bbox="721 880 1317 928">Company of the contact.</td> </tr> <tr> <td data-bbox="519 928 721 976">Postal Code</td> <td data-bbox="721 928 1317 976">Postal Code of the contact.</td> </tr> <tr> <td data-bbox="519 976 721 1024">City</td> <td data-bbox="721 976 1317 1024">City of the contact.</td> </tr> <tr> <td data-bbox="519 1024 721 1072">Country</td> <td data-bbox="721 1024 1317 1072">Country of the contact.</td> </tr> <tr> <td data-bbox="519 1072 721 1120">Amount</td> <td data-bbox="721 1072 1317 1120"></td> </tr> <tr> <td data-bbox="519 1120 721 1168">Office 1</td> <td data-bbox="721 1120 1317 1168">The first telephone number of the contact.</td> </tr> <tr> <td data-bbox="519 1168 721 1216">Reserved Agent</td> <td data-bbox="721 1168 1317 1216">UID of the agent, which has reserved this contact.</td> </tr> <tr> <td data-bbox="519 1216 721 1264">Follow-Up Agent</td> <td data-bbox="721 1216 1317 1264">UID of the agent, which owns the follow up appointment or delay.</td> </tr> <tr> <td data-bbox="519 1264 721 1311">Appointment / Delay</td> <td data-bbox="721 1264 1317 1311"></td> </tr> <tr> <td data-bbox="519 1311 721 1359">Last Result</td> <td data-bbox="721 1311 1317 1359"></td> </tr> <tr> <td data-bbox="519 1359 721 1407">Result Code</td> <td data-bbox="721 1359 1317 1407">The Result Code of the dialler call.</td> </tr> <tr> <td data-bbox="519 1407 721 1455">Contact Available</td> <td data-bbox="721 1407 1317 1455">yes if the contact was available.</td> </tr> </tbody> </table>	Variable	Meaning	Campaign	The name of the Dialler Sub Campaign	User data	Foreign system key or ID.	Client	The client.	Service	The service.	Reference Number	Reference Number e.g. from the foreign system.	Start Date		End Date		Manufacturer		Model		Tag		Name	Name of the contact.	First Name	First Name of the contact.	Company	Company of the contact.	Postal Code	Postal Code of the contact.	City	City of the contact.	Country	Country of the contact.	Amount		Office 1	The first telephone number of the contact.	Reserved Agent	UID of the agent, which has reserved this contact.	Follow-Up Agent	UID of the agent, which owns the follow up appointment or delay.	Appointment / Delay		Last Result		Result Code	The Result Code of the dialler call.	Contact Available	yes if the contact was available.
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