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Cisco Webex Contact Center Campaign Manager User Guide

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CHAPTER 1

Preface

- [Change History, on page 1](#)
- [About this Guide, on page 1](#)
- [Audience, on page 2](#)
- [Communications, Services, and Additional Information, on page 2](#)
- [Field Notice, on page 2](#)
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- [Conventions, on page 3](#)

Change History

This table lists the changes that are made to this guide. Most recent changes appear at the top.

Change	See	Date
Initial Release of this Document		November 2020
Updated user details.	Users, on page 57	
Added new reports.	Usage Report or Billing Report, on page 59	
Removed Account Number from Forms in the Script Designer chapter.	Script Designer	

About this Guide

This guide explains how to use the features available in the Cisco Webex Contact Center List and Campaign Manager (LCM), a powerful campaign management tool that greatly enhances and accentuates the fundamental capabilities of Webex Contact Center. LCM manages upload, selection, and rescheduling of contacts in addition to providing important campaign management features.

REVIEW DRAFT - CISCO CONFIDENTIAL**Note**

This guide contains references to the following, which are not supported in this release:

- Progressive Campaigns

Only outbound preview campaigns are supported in this release.

- Email and SMS

Audience

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

Communications, Services, and Additional Information

- To receive timely, relevant information from Cisco, sign up at [Cisco Profile Manager](#).
- To get the business impact you're looking for with the technologies that matter, visit [Cisco Services](#).
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- Field Notices
- End-of-Sale or Support Announcements

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- Software Updates
- Updates to Known Bugs

For more information on creating custom subscriptions, see *My Notifications* at <https://cway.cisco.com/mynotifications>.

Documentation Feedback

To provide comments about this document, send an email message to the following address:
contactcenterproducts_docfeedback@cisco.com.

We appreciate your comments.

Conventions

This guide uses the following conventions.

Convention	Description
boldface font	Boldface font is used to indicate commands, such as user entries, keys, buttons, and folder and submenu names. For example: <ul style="list-style-type: none">• Choose Edit > Find• Click Finish.
<i>italic font</i>	Italic font is used to indicate the following: <ul style="list-style-type: none">• To introduce a new term. For example: A <i>skill group</i> is a collection of agents who share similar skills.• For emphasis. For example: <i>Do not</i> use the numerical naming convention.• An argument for which you must supply values. For example: IF (<i>condition, true-value, false-value</i>)• A book title. For example: See the <i>Cisco Webex Contact Center Agent Desktop User Guide</i>.

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Convention	Description
window font	<p>Window font, such as Courier, is used for the following:</p> <ul style="list-style-type: none">• Text as it appears in code or information that the system displays. For example: <code><html><title> Cisco Systems, Inc. </title></html></code>• File names. For example: <code>tserver.properties</code>.• Directory paths. For example: <code>C:\Program Files\Adobe</code>



CHAPTER 2

List and Campaign Manager

- [Overview, on page 5](#)
- [Starting the LCM Console, on page 6](#)
- [Home Page, on page 7](#)

Overview

List and Campaign Manager (LCM) is a powerful campaign management and list management tool. LCM 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, LCM 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 LCM 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 to 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.

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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. 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 LCM database.
- LCM creates contact files based on filters or system conditions.
- If the call is patched to an agent, business outcome is indicated by the agent.
- LCM 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, LCM supplies further contacts to Dialer.

LCM Console

LCM 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 LCM Console

To launch the LCM Console:

-
- Step 1** Log in to the Webex Contact Center Management Portal.
 - Step 2** Click the **Campaign Manager** link on the navigation bar.

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

Understanding the LCM Console

Click any module to open the specific page. The LCM Console module page is displayed. The look and feel of all module pages are similar.

The components on the LCM Console module page are explained below:

- **Page Header**—The page header contains the following:
 - **Expand or Collapse Left Navigation**—Use this to expand or 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, and so on, applicable to the menu item.

Home Page

The Home page, is the gateway to the LCM application. The Home page contains the following widgets:

- 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 LCM 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.

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- **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:

-
- Step 1** Click the **Settings** button on the header line of the **QuickLinks** widget to add a new quick link page.
 - Step 2** Select check boxes corresponding to the pages that you want listed in the **QuickLinks** widget.
 - Step 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.

-
- Step 1** Navigate to the **Campaign** listing page.
 - Step 2** Click the **Edit** button on the **Action** bar of the **Campaign** for which you want a quick link.
The **Campaign Configuration** page opens.
 - Step 3** Click the **Link** button on the desired configuration item to place the quick link on the widget.
 - Step 4** Click the **Delete** button to delete the quick link.
-

To-Do List

The LCM application provides an inbuilt to-do list, useful to track or manage activities to be handled by the Webex Contact Center 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

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

Adding a Task

To add a task:

-
- Step 1** Click **Add New** on the header line of the **To Do List** to add a new task.
 - Step 2** Enter a **Title** for the task. For example, Launch a Voice Campaign.
 - Step 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.
 - Step 4** Enter a **DateTime** for completion of the task.
 - Step 5** Click **Save**.
-

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CHAPTER 3

Campaign

Administrators can upload leads or 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 LCM 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, on page 12](#)
- [Getting Started, on page 12](#)
- [Create a Campaign, on page 13](#)
- [Configuring the Campaign, on page 18](#)

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Before You Start

As a prerequisite to creating a campaign, make sure that Webex Contact Center entry points, queues, and routing strategies to associate with your campaign have been created. For more information, see the [Cisco Webex Contact Center Setup and Administration Guide](#).

- After creating an outdial entry point in Webex Contact Center, you must enable it on the LCM Group page to make it available for selection when you create a Progressive campaign. For more information, see [Group, on page 35](#).
- 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 Webex Contact Center. In the case of Progressive campaigns, the team assignment needs to be configured in the Webex Contact Center 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 Webex Contact Center outdial entry point.

In addition, the following LCM-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). For more information, see [Modes, on page 38](#).



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, and so on. For more information, see [Contact Strategy, on page 53](#).

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. For more information, see [Time Zones, on page 39](#).

Getting Started


To access the Campaign module:

- Click **Campaign** in the menu pane on the left. The **Campaign** Home page appears.

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

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- **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.

Create a Campaign

To create a new Campaign:

-
- Step 1** Click the **Floating Action Button (FAB)**. This button is located at the bottom right corner of the page.
- Step 2** Create a campaign by completing four wizards. The wizards are:
- Campaign Detail
 - Campaign Group
 - Contact Strategy
 - Configuration Options
-

Campaign Detail

To create a Campaign Detail:

REVIEW DRAFT - CISCO CONFIDENTIAL**Before you begin**

[Create a Campaign, on page 13](#)

-
- Step 1** Enter a **Campaign Name**.
- Step 2** Enter a **Description**.
- Step 3** Select a **Date Range** for the campaign. The campaign operates between the start date and end date selected in this range, both days inclusive.
- Step 4** Select a **Time Range** for the campaign. The campaign operates on all days (in the selected date range) between the selected times.
- Step 5** Select a **Business Outcome Group** from the drop-down list.
- Step 6** 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.
- Step 7** 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. For more information, see [Time Zones, on page 39](#).

The various locations across the world are divided into time zones based on the longitude 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.

- Step 8** Click the **Next** button to complete the screen and navigate to the **Campaign Group** wizard.
-

Campaign Group

Before you begin

[Campaign Detail, on page 13](#)

-
- Step 1** Select the **Voice** check box.
- Step 2** Select the type of campaign group from **Dedicated Campaign Group** or **Shared List**.
- Note** Skip to Step 5 if you selected **Shared List**.
- Step 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.
- Step 4** Do one of the following:
- If this is a **Progressive** campaign, select an entry point from the drop-down list.

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- 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.

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

Contact Strategy

Before you begin

[Campaign Group, on page 14](#)

Step 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 to build a complete rescheduling strategy. 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.

Step 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. For more information, see [Create a Contact Strategy, on page 53](#).

Step 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.

Step 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.

Step 5 If your Contact Strategy is a Simple Strategy:

- Select a number for **Cycle Retry**. This is the number of cycles that the contact strategy operates before closing the contact.
- 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.
- Skip to Step [10](#).

Step 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.
 - Skip to Step [10](#) if you do not want to configure a **Transition Window**.

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- Step 7** If a **Transition Window** is to be applied to this campaign, turn the **Transition Window** switch **ON**.
Transition Window offers the ability to constrain or limit the number of attempts for each mode across a defined duration threshold. For more information, see [Transition Window](#).
- Step 8** From the **Transition Duration (Days)** number panel, select the number of days in the Transition Window to keep count of the attempts.
- Step 9** From the **Transition Attempts** number panel, select the number of attempts allowed in a Transition Window.
- Step 10** 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. For more information, see [Create a Contact Strategy, on page 53](#).
- Step 11** 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.
- Step 12** 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.
- Step 13** 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.
- Step 14** 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.

Before you begin

[Contact Strategy, on page 15](#)

- Step 1** Optionally enter a **Prefix**. A Prefix is the string prefixed to the uploaded contacts at the time of delivery to the dialer.
- Step 2** Optionally enter a **Suffix**. A Suffix is the string suffixed to the uploaded contacts at the time of delivery to the dialer.
- Step 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. For more information, see [Chaining, on page 21](#).

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- Step 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 compliant.
- Step 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.
- Step 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.
- Step 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. For more information, see [Server Scripts, on page 33](#). Choose from the following options:
- **Library**—Select a script from the script library.
 - **VBScript**—Execute a custom-written script.
- Step 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 LCM 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.
- Step 9** If your contacts have to be dialed in conformance with a **State Law**, turn the switch **ON**.
- Various geographical regions like states, countries, and so on have laws that regulate contact center operations. These laws can be configured at the application level and chosen as applicable to campaigns. For more information, see [State Law, on page 44](#).
- 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.

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- **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.

Step 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:

- Business Parameter
- Contact Selection Strategy
- Chaining
- Contact Lists
- Manage Contacts
- Schedule
- Scrub
- 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 or 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.

To create a Unique Identifier:

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Step 1 Click the **Add Unique Identifier** button to add a unique identifier.

Step 2 Complete the following fields:

- Enter a **Unique Identifier**.
- Click **Save**.

Create a Business Parameter

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

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

Step 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.

Step 3 Select a **Dimension** from the drop-down list, if available. Dimensions help build customized reports based on business fields. For more information, see [Dimension, on page 50](#).

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.

Step 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.

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

Step 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.

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

Step 8

Step 9 The number of business fields created and the number available are displayed in the top right corner of the grid.

Step 10 Using the **Reorder** button you can reorder the business fields.

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Contact Selection Strategy

A contact selection strategy (CSS) defines how you prioritize your contacts for dialing in an LCM 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 LCM 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 LCM 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.

Create a CSS Condition

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

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

Step 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.
 - Skip to Step 11, if you are using the simple condition builder.

Step 3 Enter an open bracket - (- in the first cell.

Step 4 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.

Step 5 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), and so on.

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- Step 6** Enter a value that this condition should meet for the contact to be selected for delivery.
- Step 7** Close the bracket.
- Step 8** Click the **Add** button to add another condition.
- Step 9** Complete Steps 3 through 7. Add as many conditions as you require for your CSS.
- Step 10** After you are done with conditions, click **Save** to complete.
- Step 11** If you are not using the Advanced Builder, use the simple builder.
- Step 12** 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.
- Step 13** 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), and so on.
- Step 14** Enter a value that this condition should meet for the contact to be selected for delivery.
- Step 15** Close the bracket.
- Step 16** Click the **Add** button to add another condition.
- Step 17** In the new line, select either **AND** or **OR** from the decision drop-down list.
- Step 18** You can keep adding more such condition groups. Click **Save** when you are done.
- Step 19** If you want to add more groups, select the **Add** button from the **Group Action**.
- Step 20** Repeat Steps 11 through 16.
- Step 21** Navigate to the **Order By** section decide the order in which you want the contacts to be delivered to the dialer, ascending or descending.
- Step 22** From the **System Fields/Business Parameters** drop-down list, select an appropriate item.
- Step 23** From the Sort drop-down list, select **Asc** or **Desc** for Ascending or Descending sort, respectively.
- Step 24** To add more sort orders, click the **Add** button.
- Step 25** 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 LCM Console for contacts to be chained from one campaign to another.

Mapping

- Step 1** In the **Name** field, enter a **Mapping Name** for this chaining configuration.
- Step 2** From the **Target Campaign** drop-down list, select one to chain selected contacts from this campaign.

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- Step 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.
- Step 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 **Target Business Field** to one **Source Business Field**.
- Step 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.
- Step 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.
- Step 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.

- Step 1** From the **Saved Mapping** list in the left pane, select a mapping.
- Step 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.
- Step 3** All the **Business Outcome Groups** for this campaign are populated in the **Group Name** drop-down list. Select a **Business Outcome Group**.
- Step 4** All the outcomes under to this **Business Outcome Group** are populated. Select the required **Business Outcomes** for chaining.
- Step 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.
- Step 6** All the **Call Strategies** that use the selected **Mode** are now displayed in the **Strategy Name** drop-down list.
- Step 7** All the **Telephony Outcomes** for the selected **Mode** and **Contact Strategy** pair are listed. Select the **Telephony Outcomes** for chaining.
- Step 8** Click the **Save** button to complete the chaining.
- Step 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.
- Step 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, and so on. The **Contact Lists** page shows, at a glance, all the contact lists that you have uploaded to the campaign.

- Step 1** Click the **Floating Action Button (FAB)**.
- Step 2** Click **Upload Contacts FAB** to upload contacts.

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Step 3 In the **SourceType** field, select **FormattedFile** 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.

Step 4 Complete the following:

- a) Click the **ChooseFile** 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.

Step 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. For more information, see [Profile, on page 46](#).

Step 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. LCM 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.

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Step 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.

Step 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.

Step 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.

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

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

Step 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.

Step 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 LCM Console. From the calendar, select a **Start Date** and an **End Date** for **Time to Live**.

Step 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.

Step 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.

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- Step 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, and so on.
- Step 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 LCM 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.

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

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- Step 3** You can also use the **Condition Builder** to build conditions for filter criteria to search contacts.
- Step 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.
- Note** Skip to Step 12 if you are using the simple condition builder.
- Step 5** Enter an open bracket in the first cell.
- Step 6** 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.
- Step 7** 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), and so on.
- Step 8** Enter a value that this condition should meet for the contact to be searched.
- Step 9** Close the bracket.
- Step 10** Click the **Add** button to add another condition.
- Step 11** After you are done with conditions, click **Save** to complete.
- Step 12** If you are not using the Advanced Builder, use the **Simple Builder**.
- Step 13** 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.
- Step 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), and so on.
- Step 15** Enter a value that this condition should meet for the contact to be searched.
- Step 16** Click the **Add** button to add another condition.
- Step 17** In the new line, select either **AND** or **OR** from the decision drop-down list.
- Step 18** You can keep adding more such condition groups. Click **Save** when you are done.
- Step 19** If you want to add more groups, select the **Add** button from the **Group Action** buttons.
- Step 20** Repeat Steps 13 through 19.
- Step 21** Proceed to the **Order By** section decide the order in which you want the contacts to be delivered to the dialer, ascending or descending.
- Step 22** From the **System Fields/Business Fields** drop-down list, select an appropriate item.
- Step 23** From the **Sort** drop-down list select, **Asc** or **Desc** for Ascending or Descending sort, respectively.
- Step 24** Click the **Add** button to add more sort orders.
- Step 25** 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.

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- Step 1** From the **Filter** section of the **Manage Contacts** screen, select the **Search Contacts** button.
- Step 2** Complete the [Condition Builder, on page 25](#).
- Step 3** Click the **Show Contacts** button to populate the contacts based on the conditions.
-

Reschedule or Reset Contacts

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

-
- Step 1** From the **Filter** section of the **Manage Contacts** screen, select the **Reschedule/ Reset Contacts** button.
- Step 2** There are two ways of selecting contacts to **Reschedule/Reset**. To directly select certain types of contacts, see Step 3. To select contacts through your own filter conditions, see Step 4.
- Step 3** Select the types of contacts you want to reschedule or 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.
- Step 4** Complete the [Condition Builder, on page 25](#).
- Step 5** Click the **Show Contacts** button to populate the contacts based on the conditions.
- Step 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.
- Step 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.
- Step 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.

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- Step 1** From the **Filter** section of the **Manage Contacts** screen, select the **Block Contacts** button.
- Step 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.
- Step 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.
- Step 4** Complete the [Condition Builder, on page 25](#).
- Step 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.
- Step 6** Click the **Show Contacts** button to populate the contacts based on the conditions.
- Step 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.
- Step 8** Click **Apply** to block 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.

-
- Step 1** From the **Filter** section of the **Manage Contacts** screen, select the **Manage Contacts** button.
- Step 2** There are two ways of selecting contacts to **Move**. To directly select certain types of contacts, see Step 3. To select contacts through your own filter conditions, see Step 4.
- Step 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.
- Step 4** Complete the [Condition Builder, on page 25](#).
- Step 5** Click the **Associate Fields** button to map the modes and business fields from the source campaign to those of the target campaign.
- Step 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.
- Step 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**.
- Step 8** Click **Apply** to complete associating the fields.

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

- Step 1** From the **Filter** section of the **Manage Contacts** screen, select the **Reassign Agents** button.
- Step 2** There are two ways of selecting contacts to **Move**. To directly select certain types of contacts, see Step 3. To select contacts through your own filter conditions, see Step 4.
- Step 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.
- 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.
- Step 4** Complete the [Condition Builder](#), on page 25.
- Step 5** Click the **Show Contacts** button to populate the contacts based on the conditions.
- Step 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.
- Step 7** Click **Action** to see the **Reassign Agent** dialog box to reassign the selected contacts to other agents.
- Step 8** Enter a new **Agent** to whom the call is to be reassigned. The call is allocated to the new agent.
- Step 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.

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-
- Step 1** There are three possible sources from where you 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.
- Step 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.
- Step 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. For more information, see [Profile, on page 46](#).
- Step 4** Complete the [Condition Builder, on page 25](#).
- Step 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 more information see, [Contact Selection Strategy, on page 20](#).
- **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.

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Note Holidays are added in the **System** menu. This section only allows you to select from the added Holidays. For more information, see [Holidays, on page 45](#).

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:

-
- Step 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.
- Step 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.
- Step 3** Click **Add** to add this schedule to the campaign.
- Step 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.
- Step 5** Repeat the process for as many days of the week as you require to configure the schedules for.
- Step 6** To delete any added scheduled time slot, click the **Delete** button.
- Step 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.

-
- Step 1** Click the **Add** button to add a new run time for the campaign.
- Step 2** Enter a Run Date for configuring the run time.
- Step 3** From the Time Panel, select a **Start Time** and an **End Time**.
- Step 4** Click the **Add** button to add more run times using Step 3.

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

- Step 5** When done, click the **Save** button.
- Step 6** To delete any configured run time, click the **Delete** button.
- Step 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.

To configure **Contact Mode Scheduling**:

-
- Step 1** The days are listed in the first column. Select the day to configure and turn the switch **ON**.
- Step 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.
- Step 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**.
- Step 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.
- Step 5** Click the **Add** button to add another time range.
- Note** You can add a maximum of three time ranges for a day.
- Step 6** Click the **Save** button to save the information.
- Step 7** To delete any configured run time, click the **Delete** button.
- Step 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.

-
- Step 1** The holidays available for selection are displayed.
- Step 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.
- Step 3** Click the **Save** button to save the information.
-

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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.

-
- | | |
|---------------|--|
| Step 1 | Expand the Expression Builder section to commence building an expression. |
| Step 2 | Click Create New to create a new expression. |
| Step 3 | Enter an Expression Name . |
| Step 4 | Select a Function from the drop-down list. |
| Step 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 . |
| Step 6 | Repeat Step 5 for Parameter 2 and Parameter 3 , if required. |
| Step 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.

-
- | | |
|---------------|--|
| Step 1 | Expand the Target section to set a target. |
| Step 2 | Enter a Category Name for the target you intend setting. |
| Step 3 | Enter a Description . |
| Step 4 | From the respective counters, select or enter figures for Daily Target , Weekly Target , and Monthly Target . |
| Step 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. |
| Step 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:

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- **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 LCM 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.

-
- Step 1** Expand the **Server Scripts** section.
- Step 2** Select one of **Pre-Call Script**, **Post-Call Script**, **SMS Script**, or **Email Script** buttons.
- Step 3** Enter a duration (in seconds) for the script to timeout if not executing.
- Step 4** Click **Import File** if importing a script file. Select the script file from the **Explorer** Window.
- Step 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:

-
- Step 1** Click **Edit** to edit a campaign.
- Step 2** 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.
- Step 3** Click **Start** to start a campaign that is in a stopped state. This button toggles with the Stop button.
- Step 4** Click **Stop** to stop a running campaign. This button toggles with the Start button.
- Step 5** Click **Flush** to flush a campaign of contacts.
- Step 6** Click **Delete** to delete a campaign. Ensure no contacts are pending delivery before deleting a campaign.
-



CHAPTER 4

Group

In LCM, all Webex Contact Center 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 LCM Group page.

When you create a Preview campaign, a campaign-specific group is automatically created in LCM 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.

- [Access a Group, on page 35](#)
- [Configure a Campaign Group, on page 36](#)

Access a Group

To access a Group:

-
- Step 1** Click **Group** in the menu pane on the left to open the **Group** page.
- The grid contains the **Campaign Group** name, **Description**, **Enable**, and **Actions**.
- Step 2** Turn the **Enable** switch **OFF** to stop contacts from being delivered to the dialer for all LCM campaigns in that campaign group.
- Step 3** Using the **Expand** button on the left of the grid, to expand the group to see the campaigns belonging to the **Campaign Group**.
- 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.
- Step 4** To change the **Deliverable Percentage**, click the **Edit** button under the **Action** column and change the Deliverable Percentage.

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Step 5 Click **Save** in the **Action** column to complete the change.

Configure a Campaign Group

To configure a Campaign Group:

Before you begin

[Access a Group, on page 35](#)

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

Step 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.

Step 3 In the **Time Zone** section, select a check box for each time zone you require for this campaign group. For more information, see [Time Zones, on page 39](#).

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

Step 5 Click **Save**.



CHAPTER 5

System

The **System** module helps you configure system-wide features for the LCM 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 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 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 LCM component or service

Access System Configuration

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

To see all configuration items on the **System** menu, click the **System Menu** button.

- [Modes, on page 38](#)
- [Time Zones, on page 39](#)
- [Compliance, on page 40](#)
- [Global Upload, on page 41](#)
- [Business Outcome, on page 41](#)
- [Area or Zip Code, on page 42](#)

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- [State Law](#), on page 44
- [Holidays](#), on page 45
- [URL](#), on page 45
- [Profile](#), on page 46
- [Other Settings](#), on page 49

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, and so on.), and SIP. LCM 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 LCM 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 LCM to configure Call Strategies, Chaining contacts from one campaign to another, meet statutory requirements such as DNC, NDNC, PEWC, Calling Window, and so on.



Note Only Voice modes are supported in this release.

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

Voice

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**.

-
- Step 1** Click the **Voice Mode** button.
The **Add Voice Mode** pop up opens.
- Step 2** Enter a **Mode Name**.
- Step 3** Enter a **Description** for the mode.
- Step 4** From the number panels, select a **Minimum Length** and a **Maximum Length** for the mode.
- Step 5** Click **Save**.
-

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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

To add **Time Zones** using the **Grid View**:

-
- Step 1** Click the **Time Zone** button from the **System Menu** to add **Time Zones**.
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.
 - Step 2** You can also use the **Search** box to search for time zones.
 - Step 3** Against the required time zone, turn the **Enable** switch **ON** to select as an applicable time zone for the application.
 - Step 4** Repeat Step [Step 3](#) for as many time zones as required.
-

Map View

To add **Time Zones** using the **Grid View**:

-
- Step 1** Click the **Time Zones** icon from the **System Menu** to add **Time Zones**.
The **Grid View** opens with the listing of all time zones.
 - Step 2** Click the **Map View** button to see the time zones in a **Map View**.
 - Step 3** Click an area in the map. A pop up displaying all time zones for the selected longitude appears.
 - Step 4** Select the required check box and click **OK** to confirm selection.
 - Step 5** Repeat Steps [3](#) and [4](#) for as many time zones as required.
-

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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.

To configure **Compliance** requirements:

-
- Step 1** Click the **Compliance** icon.
The **Compliance** screen opens.
- Step 2** Select an **Upload Type**. This determines the kind of compliance contacts DNC, NDNC, or PEWC, that are being uploaded.
- Step 3** Select an **Import Mode** from the following:
- **Append**—This appends the uploaded records to an already existing DNC, NDNC, or PEWC list.
 - **Overwrite**—This clears the existing list and *appends* new records to the list.
 - **Delete**—Records in the DNC, NDNC, or PEWC list matching those being uploaded are deleted.
- Step 4** 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.
- Step 5** 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 or Database upload, access credentials, business field mapping, and so on, virtually everything associated with an upload. All you have to do is select the file path, select a profile, and upload. For more information, see [Profile, on page 46](#).
- Step 6** Navigate to the **Field Mapping** section by expanding it.
- Step 7** 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.

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- **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.

- Step 8** 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.
- Step 9** 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.
- Step 10** Complete the **Campaign Specific Compliance** section next.
- Step 11** If the contacts uploaded are to be treated as DNC or NDNC or PEWC for specific campaigns, select the **Campaign Specific** check box.
- Step 12** Select the check boxes corresponding to campaigns to which this upload is applicable.
- Step 13** 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.

Configure Business Outcomes

By default, the wrap-up codes defined in the Webex Contact Center Provisioning module are added in LCM as business outcomes.

- Step 1** Click the **Business Outcome** icon.
The **Business Outcome** screen opens.
- Step 2** 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.
- Step 3** In the **Outcomes** wizard, click **Edit** in the **Actions** column corresponding to the outcome (wrap-up code) you want to configure.
- Step 4** Select the **Outcome Type**—**Failure** or **Success**.

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- Step 5** From the number panel, select the **Days** by which a contact is to be rescheduled for this outcome.
- Step 6** From the number panel, select the **Hours** by which a contact is to be rescheduled for this outcome.
- Step 7** 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.
- Step 8** Select a number for **Max Retries**, the maximum number of retries allowed for this outcome.
- Step 9** Select a number for the **Priority** adjustment for this outcome. Adjust this number appropriately to deliver this contact on a higher priority.
- Step 10** Turn the **Close Contact** switch **ON** if you want to close the contact for this outcome.
- Step 11** Turn the **Retain PCB** switch **ON** to retain the Personal Callback to the same agent, if applicable.
- Step 12** Click **Save** in the **Actions** column to save the changes to the selected **Outcome**.
- Step 13** Click **Save** on the lower right side of the screen save your changes.
-

View Outcome Settings

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

- Step 1** Open the **Business Outcome** screen.
- Step 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 or Zip Code

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

Zip Code

To add Zip Codes:

- Step 1** Click the **Area Zip Code** icon.
- This opens the **Zip Code** screen listing of all zip codes.
- Step 2** You can also use the **Search** box to search for zip codes.
- Step 3** 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 10.

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- Step 4** Click **Add Zip Code** to add a new zip code.
- Step 5** Enter a **Zip Code**.
- Step 6** Enter a **Zone Name** to which this zip code belongs.
- Step 7** Enter a **City** for this zip code. This is an optional field.
- Step 8** Enter a **State** for this zip code. This is an optional field.
- Step 9** Click **Save**.
- Step 10** If you are importing zip codes from flat files, click **Import Zip Code**.
- Step 11** Click **Choose File** to select a file to import zip codes from.
- Step 12** 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**.
- Step 13** Click **Import**.
- Step 14** 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 timezones
 - Duplicate records
 - Other failure
- Step 15** Click **Close**.
-

Area Code

To add **Area Codes**:

-
- Step 1** Click the **Area Zip Code** icon.
- This opens the **Area Code** screen listing of all area codes.
- Step 2** You can also use the **Search** box to search for zip codes.
- Step 3** 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 10.
- Step 4** Click **Add Area Code** to add a new area code.
- Step 5** Enter a **Area Code**.
- Step 6** Enter a **Zone Name** to which this area code belongs.
- Step 7** Enter a **City** for this area code. This is an optional field.
- Step 8** Enter a **State** for this area code. This is an optional field.
- Step 9** Click **Save**.
- Step 10** If you are importing area codes from flat files, click **Import Area Code**.
- Step 11** Click **Choose File** to select a file to import area codes from.

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- Step 12** 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**.
- Step 13** Click **Import**.
- Step 14** 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 timezones
 - Duplicate records
 - Other failure
- Step 15** Click **Save**.
-

State Law

Various geographical regions like states, countries, and so on, have laws that regulate contact center operations. You can configure these state laws in LCM 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 LCM 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.

- Step 1** Click the **State Law** icon.
The **State Law** screen opens.
- Step 2** Click **Add State Law** to add a new State Law.
- Step 3** Enter a **State Name**.
- Step 4** Select a **Zone Name** from the drop-down list.
- Step 5** From the **Time** panel, select a time range (Start - Stop) in which the state law operates.
- Step 6** To set state law applicability for different days of the week, select the **Set Week Days' Timing** check box.
- Step 7** Select the state applicability timing for each day of the week.
- Step 8** Click **Save**.
- Step 9** Navigate to the **Select Zip Code** section to select the zip codes that are applicable for this state law.
- Step 10** All zip codes mapped to this state law are populated.
- Step 11** You can use the **Search** box to search for specific zip codes.
- Step 12** 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.
- Step 13** Navigate to the **Select Area Code** section to select the Area codes that are applicable for this state law.
All area codes mapped to this state law are populated.
- Step 14** You can use the **Search** box to search for specific area codes.

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- Step 15** 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.
- Step 16** Navigate to the **Select Holiday** section to map holidays to this state law.
All the holidays are populated in this section.
- Step 17** 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.
- Step 18** Click **Save All** to complete creating and configuring State Law.
-

Holidays

Holidays are declared in various geographies on account of festivals, observances, birth anniversaries, and so on. 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.

-
- Step 1** Click the **Holidays** icon.
This opens the **Holidays** screen. Holidays, if any, are populated on the **Holidays** screen.
- Step 2** Click **Add Holiday** to add a new **Holiday**.
- Step 3** Enter a **Holiday Title**.
- Step 4** 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.
- Step 5** Click **Save**. The holiday is added to the list.
- Step 6** Click **Add Holiday to Campaign** to add the saved holidays to campaigns.
- Step 7** Select check boxes corresponding to the holidays you want to add to campaigns. To add all holidays, select the **Select All** check box.
A pop up shows the application-wide campaign list.
- Step 8** 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.
- Step 9** Click **Save**.
-

URL



Note DO NOT USE the URL feature in this release.

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

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-
- Step 1** Click the **URL** icon.
To **URL** screen opens. The screen shows the URLs already added to the application.
- Step 2** Click **Add URL** to add a new **URL**.
- Step 3** Enter a Web page **Name**.
- Step 4** Enter the URL for the Web page.
- Step 5** Enter a **Description** for the Web page.
- Step 6** 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.
- Step 7** 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 or NDNC or PEWC) contacts. The various activities associated with such uploads, setting parameters, mapping various fields, and so on are handled at the profile level and are not required to be repeated at the time of upload.

To create a Profile:

-
- Step 1** Click the **Profile** icon.
The **Profile** screen opens.
- Step 2** The **Profile** screen shows a listing of all the Profiles. Click the **Create Profile** button to add a new **Profile**.
- Step 3** Enter a **Profile Name**.
- Step 4** From the **Campaign ID** drop-down list, select a campaign to which this profile is attached.
- Step 5** Enter a **Profile Path**.
- Step 6** 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 or NDNC or PEWC contacts
- Step 7** Click **OK**.
- Step 8** There are two possible sources from where you 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.

REVIEW DRAFT - CISCO CONFIDENTIAL**Step 9**

If you are uploading 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.

Step 10

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.

Step 11

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, LCM 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.

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- Step 12** 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.
- Step 13** 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.
- Step 14** 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.
- Step 15** 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.
- Step 16** Complete the **Configuration** section next.
- Step 17** 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.
- Step 18** 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 LCM Console. From the calendar, select a **Start Date** and an **End Date** for **Time to Live**.
- Step 19** 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.
- Step 20** **Filter**—Contacts from lists can be filtered on the basis of two business fields.

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- **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

- Step 21** 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, and so on.
- Step 22** Click **Save Profile** to complete creating a **Profile**.
-

Other Settings

The other System settings that are required are:

- Attempt Counter
 - Dimension
 - Area Code Split by Substring
 - Alerter
-

Step 1 Click the **Other Settings** icon.

Step 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.

Before you begin

[Other Settings, on page 49](#)

Step 1 Click **Attempt Counter**.

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The **Outcomes** column lists all the telephony outcomes.

Step 2 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, and so on.

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

Step 3 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 LCM 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.

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

Step 2 Enter a **Dimension Name**.

Step 3 Enter a **Description**.

Step 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

Step 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**.

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

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

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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.

-
- Step 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.
 - Step 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.
 - Step 3** Click **Save**.
-

Alerter

The LCM 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.

-
- Step 1** Enter a **Sender Email ID**, this is displayed in the From field when the alerter sends out a mail.
 - Step 2** Enter an **SMTP** server name that the Email is sent from.
 - Step 3** Enter an **SMTP Port** that is reserved for the SMTP server.
 - Step 4** Enter a **User Name** for the SMTP server that LCM can use to send Emails.
 - Step 5** Enter a **Password** for the above User Name for authentication.
 - Step 6** Enter a **Recipient Email ID**. The alert Email is sent to this Email.
 - Step 7** To add more recipients, click **Add** and add Email IDs.
 - Step 8** To delete recipients, use the **Delete** button.
 - Step 9** Click **Save**.
-

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CHAPTER 6

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, and so on. 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 LCM 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 LCM Console, let us have a look at how contact strategies work.

- [Contact Strategy Types, on page 53](#)
- [Create a Contact Strategy, on page 53](#)

Contact Strategy Types

LCM 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, and so on.

Create a Contact Strategy

To create a Contact Strategy:

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-
- Step 1** Click **Contact Strategy** in the menu pane on the left to open the **Contact Strategy** page.
- Step 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.
- Step 3** To add more modes to this contact strategy, if required, click the **Add Modes** button and follow instructions in **Modes**.
- Step 4** Click **FAB** to add a new contact strategy.
- Step 5** Complete three widgets to add a new contact strategy.
-

Widget 1—Contact Strategy Name

To complete the Contact Strategy Name widget:

-
- Step 1** Enter a **Contact Strategy Name**.
- Step 2** Enter a **Description**.
- Step 3** Select a **Contact Strategy Type** from Simple, Advanced, or Callback.
- Step 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.
- Step 5** Click **Next** to navigate to the **Select Mode** widget.
-

Widget 2—Select Mode

To complete the Select Mode widget:

**Note**

- Follow Steps 1 through 5 for **Simple** and **Callback** contact strategies.
 - Start from Step 6 for **Advanced** contact strategy.
-

-
- Step 1** Select a **Mode**. All modes created are available for selection.
- Note** If you do not have a mode that applies to this contact strategy, create a new Mode by clicking the **Add** button.
- Step 2** Use the pop up time panel to select a **Time Range** for this contact strategy to be operational.
- Step 3** Turn the **PEWC** switch **ON** to enable PEWC for this contact strategy.
- PEWC**(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.
- Step 4** Click **Previous** to navigate to the previous screen at any time.

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Step 5 Click **Next** to navigate to the **Telephony Outcomes** widget.

Note Start from Step 6 for **Advanced** contact strategy.

Step 6 Select a **Mode**. All modes created are available for selection.

Note If you do not have a mode that applies to this contact strategy, create a new Mode by clicking the **Add** button.

Step 7 Use the pop up time panel to select a **Time Range** for this contact strategy to be operational.

Step 8 Use the slider to configure the **Mode Retries** for this contact strategy.

Step 9 Turn the **PEWC** switch **ON** to enable PEWC for this contact strategy.

Step 10 Turn the **Transition Retry** switch **ON** to enable a **Transition Window** for this contact strategy.

Transition Window

Transition Window offers the ability to constrain or 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 be reached out for dialing only a specified number of times during a specified time period. This is addressed by the Transition Window feature.

- **Mode-level Transition Window**—The type of rule that says a mobile number must be attempted not more than 3 times within 7 days.
- **Contact-level Transition Window**—Set at campaign level, this limits the number of attempts over a period of time. For example, attempt note more than three times (across all the phone numbers) in a week.

Note The campaign-level transition windows is applied only within a campaign.

Step 11 Use the **Transition Attempts** slider to fix the number of attempts in a transition window for this contact strategy.

Step 12 Use the **Transition Duration (Days)** slider to set the number of days for the transition window.

Step 13 Next is the **Retain Mode Retries while switches to Callback** switch.

- In the **ON** position, the remaining retries for this mode is retained when the contact switches to a Callback Strategy.
- In the **OFF** position, the retries count is initialized to zero when the contact switches to a Callback Strategy.

Step 14 Click **Previous** to navigate to the previous screen at any time.

Step 15 Click **Next** to navigate to the **Telephony Outcomes** widget.

Widget 3—Telephony Outcomes

To complete configuring the contact strategy:

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

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

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

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

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- Step 5** 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.
- Step 6** From the number panel, select a **Lead Score** for this Outcome.
- Lead Score** helps in identifying the most prospective customer to be reached out from a campaign. This score is available as part of contact selection strategy and can be set at the time of upload or wrap up, while defining the business / telephony outcome.
- Step 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.
- Step 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.
- Step 9** Select the **Close Contact** check box if you want to close the contact based on this outcome.
- Step 10** Select the **Remove Mode** check box if you want to remove the Mode for a combination of this contact strategy and this outcome.
- Step 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 the above instructions to configure more modes.
- Step 12** Click **Save** to complete creating and configuring a Contact Strategy.
-



CHAPTER 7

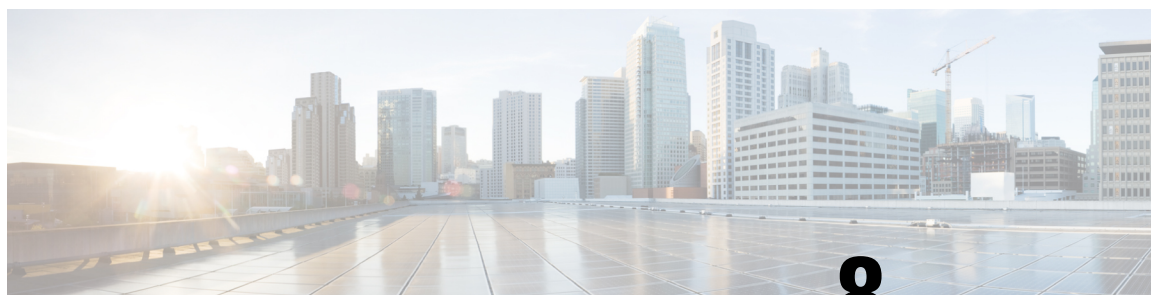
Users

- [Users, on page 57](#)

Users

Webex Contact Center users do not get imported into LCM. By default, users whose user IDs are provided at the time of provisioning LCM are granted super user privileges. The administrator can create additional users in LCM and assign the necessary roles. LCM is integrated with the Cisco Identity Service (SSO) for authentication.

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CHAPTER 8

Reports

Complete details of all reports on the LCM application are available in the [Cisco Webex Contact Center Campaign Manager Reports Guide](#).

- [License Reports](#), on page 59
- [Usage Report or Billing Report](#), on page 59

License Reports

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

- Concurrent Login Report
- Violation Report

For descriptions of all reports available from the LCM console, see the [Cisco Webex Contact Center Campaign Manager Reports Guide](#).

Usage Report or Billing Report

The **Usage Report** page (for Perpetual license model) and the **Billing Report** page (for Subscription license model) display the corresponding license consumption data. Access the **License** menu and click the **Usage** (or) **Billing** module to arrive at the corresponding page.

The **Usage Report** or **Billing Report** page for tenant model displays the usage reports for individual tenants. It features a tenant selection drop-down featuring the list of tenants. The tenants are listed in the order starting from the first created at the top to the last created in the bottom. The first created tenant is selected by default and the corresponding report is displayed. By default, the report displays the data for the current year with each month in an individual tab. The first tab displays the data for the current month, while the data for the previous months are available in the subsequent tabs. Clicking the arrow buttons allows to scroll through the tabs.

To view the month-wise reports for a different year, access the drop-down along the **Year** field to select from the list or manually enter a year. Thereby, the reports for the corresponding months (starting from the latest to the oldest month of the year, as applicable) are generated.

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Note The pre-defined time range allows to view the data for the last two calendar years only. For instance, if the current is 2019, the drop-down corresponding to the **Year** field allows to select or enter a calendar year within a range of 2017 to 2019. To view the data for an older year or a wider time range, access the **Custom Time Range** option.

To define a custom time period for the generating the Usage or Billing report:

Step 1 Select the **Custom Date Range** option.

Step 2 Click the **Start Date** field to select a Start Date and Time.

Step 3 Click the **End Date** field to select an End Date and Time.

Note By default, the **Start Date** and the **End Date** fields display the current date and the time, at which the **Usage Report** or **Billing Report** page is last opened.

Step 4 Click the **Show** button to generate the corresponding report data.

Note The month-wise classification of usage report is not applicable for **Custom Date Range** selection. The data for the defined time range is presented in a single list.

The **Refreshed Time** displays the last refreshed date and time of the usage report data. Access the **Refresh** button to refresh the data to the current.

The Usage or Billing Report is displayed as a table with the following columns:

- **Date**—Displays the dates for which the usage data is populated.
 - **Total Attempts**—Displays the total number of contact attempts made across channels that include calls, voice drop (that is, IVR calls), email and SMS for the given date.
 - **Agent**—This section includes the following columns of agent-specific data:
 - **Count**—Displays the count of agents, who handled the contacts for the given date.
 - **Calls Handled**—Displays the count of calls handled by the agents for the given date.
 - **Call (Hrs:Mins)**—Displays the total call duration of all the calls handled by the agents for the given date.
 - **Voice Drop**—This section includes the following columns of data specific to voice drop (IVR calls):
 - **Calls Handled**—Displays the count of IVR calls conducted for the given date.
 - **Call (Hrs:Mins)**—Displays the total duration of all the IVR calls conducted for the given date.
 - **Other Channels**—This section includes the following columns of data pertaining to non-voice channels:
 - **SMS**—Displays the count of SMS sent for the given date.
- Note** For two-way SMS, the count gets incremented for every transaction on each side.
- **Email**—Displays the count of Emails sent for the given date.

REVIEW DRAFT - CISCO CONFIDENTIAL**Data Drilldown**

The Usage Report or Billing Report offers a further drilldown of data agent-wise and time-wise. Access the expander arrow along each row to view the drilldown. By default, the table displays agent-wise drilldown.

The agent-wise drilldown features the details of individual agents - such as the corresponding agent names, calls handled, and total duration of all the calls handled individually.

To view the time-wise drilldown, select the **Time** option by clicking the corresponding radio button in the Show By field and access the expander arrows along each row to view the hour-wise drilldown.

The hour-wise drilldown data features the details captured for every hour, starting from the first minute to the sixtieth minute of an hour. Example, 14:01 to 15:00.

**Note**

The time is displayed in the 24-hour format for the time-wise display of the usage data.

Exporting Usage or Billing Report

The **Export** button allows to download the usage data into XLSX files. Exporting the report for a pre-defined time range (**Year** option) renders individual files for each month.

To export the usage data:

-
- Step 1** Click the **Export** button.
 - Step 2** Select the type of report (**Summary**, **Agent**, **Time**) to be downloaded, in the pop up that appears. For more information, see [License Usage Report Types](#), on page 61.
 - Step 3** If the exported report has a pre-defined time range, select the required months to export the data. The current month is selected by default. This step is not applicable if the time range is custom defined.
 - Step 4** Click the **Export** button in the pop up to download the corresponding report as an XLSX file.
-

License Usage Report Types

The following are the report types available to be exported as XLSX files:

- **Summary** (default selection)—This report type features the following columns of data:
 - **UsageDate**—Displays the dates for which the usage data is populated.
 - **TotalAttempts**—Displays the total number of campaign attempts made by the agents that include calls, voice drop (that is, IVR calls), email and SMS for the given date.
 - **AgentCount**—Displays the count of agents, who handled the campaign for the given date.
 - **AgentCallsHandled**—Displays the count of calls handled by the agents for the given date.
 - **AgentCallHours**—Displays the total duration of all the calls handled by the agents for the given date.
 - **VoiceCallsHandled**—Displays the count of voice drops conducted for the given date.

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- **VoiceCallHours**—Displays the total duration of all the voice drops conducted for the given date.
- **SMS**—Displays the count of campaign SMS sent for the given date.
- **Email**—Displays the count of campaign Emails sent for the given date.
- **Agent**—This report type features the following columns of data:
 - **UsageDate**—Displays the dates for which the usage data is populated.
 - **AgentName**—Displays the name of the agent, who handled the calls for the given date.
 - **AgentCallsHandled**—Displays the count of calls handled by the agents for the given date.
 - **AgentCallHours**—Displays the total duration of all the calls handled by the agents for the given date and hour.
- **Time**—This report type features the following columns of data:
 - **UsageDateTime**—Displays the date and the hour, for which the usage data is populated.
 - **TotalAttempts**—Displays the total number of campaign attempts made by the agents that include calls, voice drop (that is, IVR calls), email and SMS for the given date and hour.
 - **AgentCount**—Displays the count of agents, who handled the campaign for the given date and hour.
 - **AgentCallsHandled**—Displays the count of calls handled by the agents for the given date and hour.
 - **AgentCallHours**—Displays the total duration of all the calls handled by the agents for the given date and hour.
 - **VoiceCallsHandled**—Displays the count of voice drops conducted for the given date and hour.
 - **VoiceCallHours**—Displays the total duration of all the voice drops conducted for the given date and hour.
 - **SMS**—Displays the count of campaign SMS sent for the given date and hour.
 - **Email**—Displays the count of campaign Emails sent for the given date and hour.



CHAPTER 9

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 LCM console menu pane to open the Script Designer.

- [Campaign, on page 63](#)
- [Forms, on page 64](#)
- [Creating Global Variables, on page 64](#)
- [Script Block, on page 65](#)
- [Text - Welcome, on page 65](#)
- [Check Box, on page 65](#)
- [Multiple Choice, on page 66](#)
- [Choose from a List, on page 66](#)
- [Text-Thank You, on page 66](#)
- [Business Fields, on page 66](#)
- [Global Variables, on page 66](#)
- [Question Fields, on page 66](#)
- [Question Sequencing, on page 67](#)
- [Copying a Form, on page 68](#)
- [Library Functions, on page 68](#)
- [Reports, on page 69](#)

Campaign

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

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

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5. Click **Remove** at the top-right corner of the 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, 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 create 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 reuse 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.

Check Box

Drag and drop the **Check Box** icon on the left pane to display the screen.

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Multiple Choice

You can also configure a question that has multiple answers. You can list the answers that the agent can select from his desktop based on the customer's response.

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 for which the answers are 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 that is not on the list, the agent can dynamically add the item to the list and complete the selection. This addition will also be available in the list as 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 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 that you created as per [Creating Global Variables, on page 64](#) 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 (the answer that 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.

REVIEW DRAFT - CISCO CONFIDENTIAL**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 displays 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 correctly.

Expand the question to open the sequencing section.

You can validate some of the 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 that are displayed on the screen 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. You can select the list of questions sequentially.

- **Go to next question** - Select this option to go to the 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 for assigning values 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 to this field. You can also give a custom value. By assigning a new value to 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. 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

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can configure an 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. 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 the JavaScript function.

**Note**

You cannot reset the primitive types such as integer, float, decimal, string, etc.

1. Click the **Edit** button to edit the fields.
2. Click the **Delete** button to delete the condition.
3. 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 the form to other campaigns within the 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.

**Note**

You cannot copy forms across campaign groups.

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 (at the top-right corner of the screen), select **New Form** to create a new form or select the desired form to edit an existing form.

Library Functions

LCM provides a list of in-built JavaScript functions. You can also create customized JavaScripts in the Script Block.

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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 LCM application are available in the [*Cisco Webex Contact Center Campaign Manager Reports Guide*](#).

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CHAPTER 10

Teams

- [Teams, on page 71](#)

Teams

A team is a grouping of agents in Cisco Webex Contact Center. Teams that have been created in the Provisioning module of the Cisco Webex Contact Center portal are listed on the LCM **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.

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