Genesys 7.6

Proactive Routing

Solution Guide

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Document Version: 76g_sg-pr_10-2008_v7.6.001.00

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Preface

Welcome to the *Genesys 7.6 Proactive Routing Solution Guide*. The Genesys Proactive Routing solution results from the integration of the Outbound Contact product with the Customer Interaction Management (CIM) platform (see page 16). Along with other features, this integration provides the ability to:

- Proactively route interactions generated in `Push Preview` mode to Genesys Agent Desktop.
- Completely process Calling List and Do Not Call List records solely from the logic of a routing strategy without agent intervention.

Deploying proactive routing requires configuring various Genesys products. To prevent the solution configurer from having to consult multiple product guides, this guide consolidates proactive routing configuration information into one guide. It starts with a proactive routing overview and continues with how to configure the component products. It concludes with running a Proactive Routing solution and sample strategies that demonstrate "agent-less" proactive routing for multimedia interactions.

This document is valid only for the 7.6 release(s) of this product.

`Note:` For versions of this document created for other releases of this product, please visit the Genesys Technical Support website, or request the Documentation Library DVD, which you can order by e-mail from Genesys Order Management at `orderman@genesyslab.com`.

This preface provides an overview of this document, identifies the primary audience, and lists related reference information:

Intended Audience

The *Genesys 7.6 Proactive Routing Solution Guide* is primarily intended for those involved in deploying Proactive Routing. This guide assumes that you have already installed and are familiar with the component products:

- Genesys Outbound Contact
- Genesys Universal Routing
- Genesys Multimedia (part of CIM platform)

This guide also assumes that you have a basic understanding of:

- Computer-telephony integration concepts, processes, terminology, and applications.
- Network design and operation.
- Genesys Framework architecture and functions including Configuration Manager.

Chapter Summaries

In addition to this preface and an index on page 111, this guide contains the following chapters:

- Chapter 1, "Overview," on page 15, begins by defining proactive routing in general, describes proactive routing from a solution standpoint, summarizes the Genesys products that must be integrated for proactive routing, shows processing flow, lists business use cases, and ends with proactive routing features and benefits.
- Chapter 2, "Configuring Outbound Contact for Proactive Routing," on page 31, describes Outbound Contact objects, configuring the Outbound Contact Server `Application` object, configuring the Campaign Group object, and modifications made to the communication protocol between Outbound Contact and Agent Desktop.
- Chapter 3, "Configuring Multimedia for Proactive Routing," on page 45, describes obtaining the required technical license, Outbound Contact Server and Interaction Server communication, and configuring the Interaction Server object.
- Chapter 4, "Configuring Universal Routing for Proactive Routing," on page 49, describes strategy support for proactive routing, configuring proactive routing strategies, using the Outbound strategy-building objects, opening the window where you create multimedia routing strategies, creating business processes that contain multimedia routing strategies, loading strategies on virtual routing points, setting an environment option, and routing based on agent capacity.

- Chapter 5, “Configuring Agent Desktop and Login Dialog Box,” on page 75, describes agent capacity rules, how to specify the media types that appear in the login dialog box for Agent Desktop, as well as an option that controls workflow postprocessing.
- Chapter 6, “Using Proactive Routing,” on page 83, summarizes the steps for creating and launching a proactive routing Campaign.
- An appendix, “Strategy Samples” on page 93, contains sample multimedia strategies that demonstrate how to use the Add Record, Do Not Call, Processed, Reschedule, and Update Record Outbound strategy-building objects for “agent-less” processing of Campaign List records.

Related Resources

This guide assumes you have already installed and configured the component products listed below.

Outbound Contact

Consult these documents:

- *Outbound Contact 7.6 Deployment Guide*, which provides instructions on installing and configuring Outbound Contact 7.6 components using the Configuration Wizards and Configuration Manager, as well as information about configuration options.
- *Outbound Contact 7.6 Reference Manual*, describes application features for Outbound Contact 7.6 and provides information about constants and communication protocols.
- *Outbound Contact Manager 7.6 Outbound Contact Manager Help* file, which describes how to use Outbound Contact Manager when running a proactive routing Campaign.

Universal Routing

Consult these documents:

- *Universal Routing 7.6 Deployment Guide.* The first part of the guide provides information you will need to get started: A high-level overview of Universal Routing features and functions, including product architecture, system availability, redundancy information and deployment-planning. The second part of the guide provides instructions for deploying Universal Routing components, and describes how to start and stop these components once you have configured and installed them.

- *Universal Routing 7.6 Reference Manual*, which describes and defines routing strategies, IRD objects, Universal Routing Server and other server functions and options, number translation, pegs, and statistics used for routing.
- *Universal Routing 7.6 Business Process User's Guide*. This guide contains step-by-step instructions for creating interaction workflows (business processes), which direct incoming customer interactions through various processing objects. The goal is to generate an appropriate response for the customer.
- *Universal Routing 7.6 Interaction Routing Designer Help*, which describes how to use Interaction Routing Designer to create routing strategies. It also describes the Interaction Workflow view where you create business processes that route incoming interactions through various processing objects with the goal of generating an appropriate response for the customer.
- *Universal Routing 7.6 Routing Application Configuration Guide*, which contains information on the various types of routing solutions that can be implemented, including skills-based routing, business-priority routing, share agent by service level agreement routing, and cost-based routing.

Multimedia

Consult these documents:

- *Multimedia 7.6 Deployment Guide*, which includes a high-level overview of features and functions of Genesys Multimedia together with architecture information and deployment-planning materials. It also introduces you to some of the basic concepts and terminology used in this product.
- *Multimedia 7.6 User's Guide*, which provides overall information and recommendations on the use and operation of Genesys Multimedia.
- *Multimedia 7.5 Open Media Interaction Models Reference Manual*, which presents a set of basic interaction models, showing the components involved and the messaging (requests, events) among them.

Genesys

Consult these documents:

- *Genesys 7 Events and Models Reference Manual*, which provides information on most of the published Genesys events and their attributes, and an extensive collection of models describing core interaction processing in Genesys environments.
- "Multimedia, Outbound Contact, and Universal Routing Log Events" in *Framework 7.6 Combined Log Events Help*, which is a comprehensive list and description of all events that may be recorded in Management Layer logs.

- The *Genesys Technical Publications Glossary*, which ships on the Genesys Documentation Library DVD and provides a comprehensive list of the Genesys and CTI terminology and acronyms used in this document.
- The *Genesys 7 Migration Guide*, also on the Genesys Documentation Library DVD, which provides a documented migration strategy from Genesys product releases 5.1 and later to all Genesys 7.x releases. Contact Genesys Technical Support for additional information.
- The Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support website at http://genesyslab.com/support.

Information on supported hardware and third-party software is available on the Genesys Technical Support website in the following documents:

- *Genesys Supported Operating Systems and Databases*
- *Genesys Supported Media Interfaces*

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Chapter

1 Overview

This chapter begins with a general definition of proactive routing. It then describes proactive routing from a Genesys solution standpoint, continues with overviews of the Genesys products required for proactive routing, and presents various business use cases that could be solved with proactive routing. The chapter ends with a list of proactive routing features and benefits and a task flow of steps to create a Proactive Routing solution.

The information in this chapter is divided among the following topics:

The CIM Platform

To create the capability for proactive routing, Genesys integrated its Outbound Contact product with the Genesys Customer Interaction Management (CIM) platform. The CIM platform consists of the following:

- Management Framework
- Reporting (CC Analyzer, CCPulse+)
- Interaction Management, which in turn consists of:
  - Universal Routing
  - Interaction Workflow
  - Knowledge Management
  - Content Analysis
  - Universal Contact History

On top of the CIM Platform are various media channels, including Open Media, which includes interactions generated in `Push Preview` mode used by a Proactive Routing solution. Figure 1 shows a graphical representation:

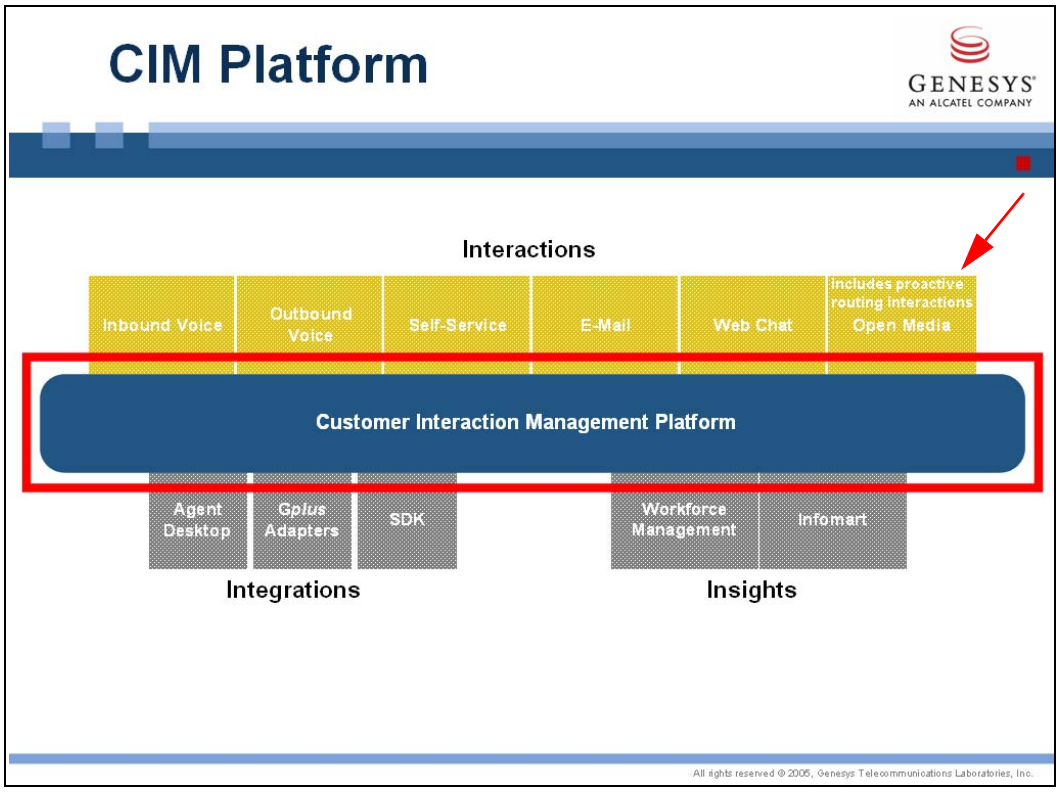

Figure 1: Customer Interaction Management Platform

What Is Proactive Routing?

In general, proactive routing means using the Genesys software to send potential customer interactions to agents prior to customer contact when running a *Campaign*. Examples of Campaigns include a telephone collection Campaign aimed at customers with outstanding balances on credit cards or an e-mail Campaign marketing a new product. The goal is to prepare agents prior to the actual customer contact during the running of a Campaign. Contrast proactive routing with the routing of interactions that originate from customers. Proactive routing can also be used for agent work items initiated in-house.

What Is a Proactive Routing Solution?

> Note: This guide sometimes refers to proactive interactions as *interactions generated in* `Push Preview` *mode*. From a Genesys Configuration Database standpoint, they are Open Media interactions with a `media type` of `outboundpreview` (see Figure 13 on page 51).

A Proactive Routing solution provides the ability to:

1. Preview interactions in Push Preview mode on Agent Desktop prior to sending voice or non-voice responses (depending on the type of contact information supplied with the push preview interaction) to customers (see "Handling Preview Interactions" on page 85). `Push Preview` mode was new starting with 7.5.
2. Completely process Calling List and Do Not Call List records solely from the logic of a routing strategy without agent intervention.
3. Use the same Outbound List and Campaign Management capabilities for managing both voice and non-voice interactions.
4. Configure the solution to select agents based on business rules contained in routing strategies while still considering agent capacity rules (see page 70).

For a complete list of features and benefits, see page 26.

Proactive Routing Strategies

You can create proactive routing strategies that use the following Outbound strategy-building objects for "agent-less" processing of Campaign List records: Add Record, Reschedule, Update, Do Not Call, and Processed (see "Strategy Samples" on page 93). Example of agent-less processing (second strategy):

1. A customer calls, but abandons the call before an agent can answer.
2. The first routing strategy detects the abandoned call.

3. The routing strategy uses the Create Interaction IRD strategy-building object to create a customer interaction record in the Universal Contact Server Database and then writes the interaction to a queue in a business process (see Figure 54 on page 94).
4. A second strategy in the business process uses the Add Record object to add the customer to a specified Calling List without agent intervention.

The Calling List can subsequently be used by an Outbound Campaign that dials out these customers during off peak hours and has the agent apologize and follow up (see Step 1 on page 22).

Component Products

The ability to proactively route interactions of the `outbound preview` media type to the Agent Desktop is enabled through the integration of the following Genesys products/servers:

- Outbound Contact and Outbound Contact Server (the dialing engine)
- Universal Routing and Universal Routing Server (the routing engine)
- Multimedia and Interaction Server (the workflow engine)

Outbound Contact Server's `Push Preview` mode pushes interactions to the Genesys Agent Desktop using intercommunication between Interaction Server and Universal Routing Server.

Each Genesys product is briefly summarized below. For more information, start with the product's deployment guide. The instructions in this guide assume each component product is already installed.

Outbound Contact

Outbound Contact is an automated system that is used to create, modify, and run outbound Campaigns (for example, a dialing Campaign or an e-mail Campaign) in which agents interact with customers.

A Campaign is a flexible master plan that organizes Outbound Lists for the purpose of contacting customers and handling contact results. Each Outbound List record contains a Campaign name and Campaign ID, as well as customer contact information such as a phone number and e-mail address.

Running a Campaign (such as a marketing Campaign) involves launching the Campaign, monitoring it, and making any necessary adjustments. To perform these tasks, Outbound Contact users can:

- Create *Outbound Lists* (such as Calling Lists) from customer contact information.

> `Note:` Since Outbound Contact 7.6 supports multiple media types, this guide sometimes substitutes "Outbound List" for "Calling List."

Outbound Lists are generated from customer information in database tables. Records can store customer phone numbers, e-mail addresses, and other customer/business-related data.

- Group Outbound Lists into *Campaigns* for outbound dialing and other types of contact. See above note.
- Share Campaigns among multiple agent groups.
- Create Campaign sequences with the Campaign Sequence object, which provides predefined thresholds and automatic agent assignments.
- Chain records for a customer (multiple call records).
- Choose different dialing modes.
- Define treatments and scheduled calls for unsuccessful calls on each Calling List.
- Monitor Campaigns using Reporting tools.
- Apply Do Not Call (or Do Not Contact) by type of customer contact information or customer ID.

Outbound Contact has a client/server architecture consisting of the following components: Outbound Contact Server, Outbound Contact Manager, Call Progress Detection Server, CPD Proxy Server

Note: For more information on these components, start with the *Outbound Contact 7.6 Deployment Guide* on the Genesys documentation library DVD.

Universal Routing

Universal Routing (comprised of Enterprise Routing and Network Routing) consists of the following components: Universal Routing Server, Interaction Routing Designer, and Custom Server.

Universal Routing enables intelligent distribution of interactions throughout the enterprise, whether you have a single-tenant or a multi-tenant environment. Universal Routing can direct interactions from a wide variety of platforms, such as toll-free carrier switches, premise PBXs or ACDs, IVRs, IP PBXs, e-mail servers, web servers, and workflow servers. It can handle pure-voice, multimedia, and blended environments, enabling routing of each media type based on appropriate criteria.

Routing Strategies

An integral part of Universal Routing are the routing strategies created in a graphical user interface called Interaction Routing Designer (IRD).

- IRD enables you to create, test, modify, and load routing strategies.

- Universal Routing Server (URS or “Router”) executes the routing strategy instructions.

A routing strategy is a set of decisions and instructions that tell URS how to handle and where to direct interactions under different circumstances. Think of a strategy as a structured set of choice-points, each of which analyzes some aspect of the current interaction. The data that a strategy uses to analyze an interaction includes facts related to the interaction itself, the customer initiating the interaction, the state of the contact center, the particular point in time, and so on. At any given choice-point, only one of several possible outcomes can be optimal. URS determines which outcome is optimal and sends the interaction along a specified route accordingly. The appendix on page 93 contains sample strategies.

Note: For more information on these components, start with the *Universal Routing 7.6 Deployment Guide* on the Genesys documentation library DVD.

Multimedia

Genesys Multimedia (formerly Multi-Channel Routing) is a cover term for Genesys components that work together to manage interactions whose media is something other than traditional telephonic voice (for example, e-mail or chat).

Multimedia includes some parts of the CIM platform, plus certain of the media channels that run on top of the Platform:

- From the CIM Platform, the following Interaction Management functions:
  - Interaction Workflow—centralized handling of interactions irrespective of media type
  - Knowledge Management—creation and maintenance of standard responses and screening rules (often used for e-mails)
  - Content Analysis—optional enhancement to Knowledge Management, applying natural language processing technology to categorize interactions (often used for e-mails)
  - Universal Contact History—storage of data on contacts and on interactions (linked as threads)
- From the media channels, at least one of the following functions:
  - Genesys E-mail—e-mail
  - Genesys Web Media—chat
  - Genesys Open Media—ability to add customized support for other media (fax, for example). Note: The `outbound preview` media type used for a Proactive Routing solution is another example of Open Media.
  - Optionally, Web Collaboration—the ability for agents and customers to cobrowse (simultaneously navigate) shared web pages.

Genesys Multimedia components work together to handle interactions from disparate media-based devices. It allows you to centralize your handling of the various communication channels that customers use to reach your interaction contact center. Genesys Multimedia components include (but are not limited to):

- Interaction Server, which is the central interchange for interaction flow. It works in concert with Universal Routing Server to route non-voice interactions based on interaction workflows.
- Universal Contact Server, which interfaces with a Universal Contact Server Database that stores customer information and other data used for processing interactions

Note: For more information on these and other Multimedia components, start with the *Multimedia 7.6 Deployment Guide*.

Agent Desktop

Agent Desktop is a Genesys application that enables online communication between customers and companies. Many customers design their own agent desktop applications, and so will build interfaces that best reflect the business needs of their environments. If you plan on using the Genesys Desktop in `Push Preview` mode for proactive routing, make note of the following series of steps your agents will encounter between the time the outbound preview interaction arrives at their desktops and the beginning of their work with customers.

To engage in proactive routing in `Push Preview` mode with the Genesys Desktop, agents should:

1. Accept the outbound preview interaction when it arrives at the desktop.
2. Review details about the interaction they are about to have with the customer.
3. Click the appropriate button to create a new interaction that instantiates that contact with the customer.

For more information on Agent Desktop as it relates to Proactive Routing, start with “Configuring Agent Desktop and Login Dialog Box” on page 75.

New in This Release

There is no new functionality in the initial 7.6 release of the Proactive Routing solution.

Preview Interaction Flow

Figure 2 shows a flow diagram for a preview interaction (shaded area).

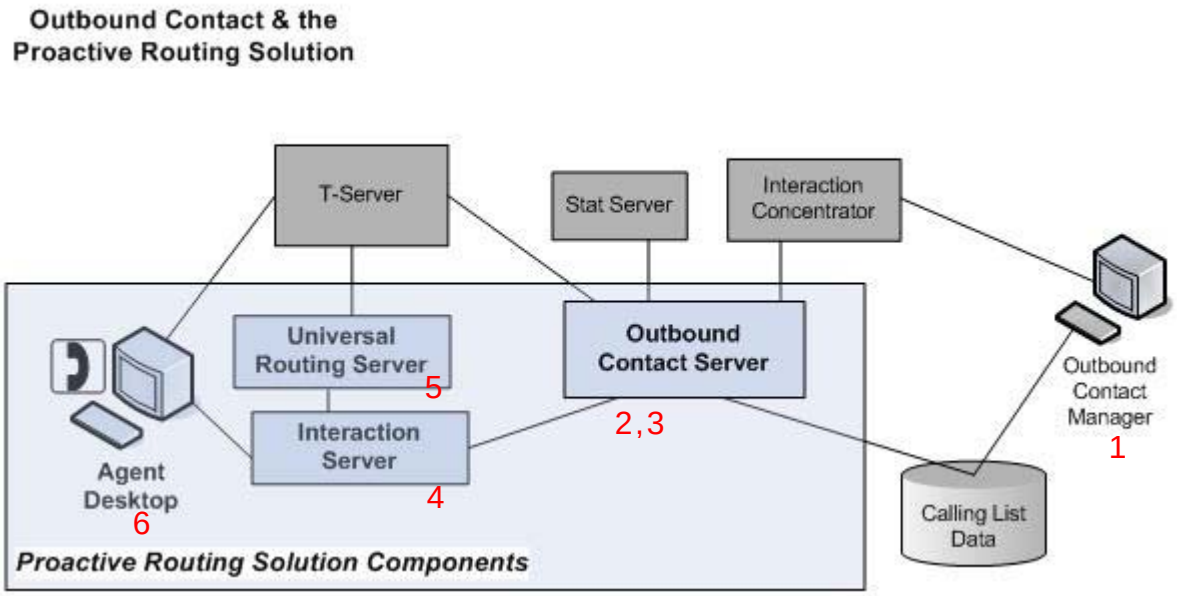

Figure 2: Preview Interaction Flow

Note: The numbers below are keyed to the diagram in Figure 2.

1. Someone starts an outbound Campaign in Outbound Contact Manager.
2. Outbound Contact Server gets information about the Campaign from the Configuration Database via Database Server.
3. Outbound Contact Server sends the interaction in `Push Preview` mode to Interaction Server, which will work with Universal Routing Server to get agent availability.
4. Universal Routing Server notifies Interaction Server that an agent is available for the push-preview interaction.
5. Interaction Server delivers the push-preview interaction to the Agent Desktop (see Figure 48 on page 87).
6. The agent handles the interaction. For example, the agent may preview the record, contact the customer, update the record, reschedule, or mark as Do Not Call. The final result of the interaction is sent to Outbound Contact Server.
7. Outbound Contact Server finalizes the record and updates the calling list in the database.

Business Use Cases

Business use cases for a Proactive Routing solution fall into the following categories:

- **High value/low volume activities such as:**

  Multi-lingual Outbound Campaign

  Flexible callback routing

  Last minute pre-dial check
- **Strategic interactions such as:**

  Training Campaigns

  Automated follow-up list development
- **Non-voice communications (multimedia interactions)**

  Outbound multimedia Campaigns (including e-mail, chat, SMS).

The next section presents some specific use cases.

Use Case #1: Multi-lingual Outbound Campaign

A Proactive Routing solution could be used to implement the following use case:

- Single Campaign running in `Push Preview` mode (calls are dialed only after the agent first previews a Calling List record and manually requests the call to be dialed).
- Customers on the Calling List speak different languages.
- Agents possess multiple language skills, with those `Skills` defined in the Configuration Database and assigned to the `Person` (agent) object.
- Routing interactions to agents is accomplished by URS executing a routing strategy, matching the customer's primary language with agent language skills.
- This is a multi-lingual fraud protection Campaign directed at credit card customers because a recent transaction triggered the suspicion of fraud.
- Calling List is generated dynamically (new records arrive, old records may disappear as customers call in themselves).
- Customer's language is contained in the interaction as a record attribute.
- Each agent's language is identified as a `Skill` object in Configuration Manager and the `Skill` object is assigned to the `Person` (agent) object.
- Outbound records routed to appropriate language agents in `Preview` mode.
- If the attempt to contact the customer fails (exceeds five hours), solution generates an e-mail with the text: `We blocked your card for the fraud suspicion. Tried to contact you. Please call this number.`

- The Campaign attempts to contact high-value customers first (`Customer Segment` specified as a record attribute).
- If the customer calls in, the call is matched with the case (record) and the record is updated with the appropriate result.
- Agents are blended (can work with media channels other than `voice`). Priority is defined by customer value, but inbound calls with the same value have a higher priority than outbound.

Use Case #2: Callback Routing

A Proactive Routing solution could be used to implement the following use case:

- Contact center with specific business requirements associated with outbound calls and callback distribution among agents.
- Outbound agents are divided into relatively small teams (5-7 people) with specific revenue objectives.
- When an outbound call results in a callback request, this callback request must be managed by the same agent team in order to keep track of the revenue.
- Outbound call distribution is implemented according to the following rules:
  - `Predictive` dialing mode is used to dial new calls (records); agent availability is predicted.
  - Answered calls are delivered to any Campaign agent.
  - If Personal Callbacks are scheduled during this predictive outbound campaign, they should be handled using `Push Preview` mode (records are delivered to agents who scheduled a Callback and are dialed when the agent manually requests a call to be dialed).
- To achieve this, a new campaign with a new calling list pointed to the same calling list DB table and a filter to select only records of type `Personal CallBack` should be created.
- The same group of agents which runs predictive campaign mentioned above should be assigned to this new Campaign, which is to be running in `Push Preview` dialing mode.

Note: In order for OCS to be able to retrieve those Personal Callbacks for the second campaign and deliver them to participating agents, the agent who schedules a Personal Callback should update the calling list's `campaign_id` field with the `DBID` of a second campaign which runs in `Push Preview` mode.
Additionally, the OCS option `direct-personal-callback` should be set to `FALSE`.

- The Solution then delivers the Personal Callback record to the requesting agent by means of a second campaign.
- Routing strategy logic ensures that if the requesting agent is not available, the callback is delivered to the requesting agent's team.

Use Case #3: Last minute Pre-Dial Check

A Proactive Routing solution could be used to for the following use case:

- Collection Campaign running in preview mode.
- Preview records are routed to agents with routing strategy.
- Before sending the record to the Agent Desktop, the strategy checks if customer still has an outstanding balance or whether the issue was resolved after the Calling List was built for the collection Campaign. If the issue is resolved, the record is completed without sending it to the agent.

Use Case #4: Training Campaign

A Proactive Routing solution could be used for the following use case:

- There is a shortage of agents trained (skilled) for selling product XYZ in a call center. It is identified that at least 20 more agents should be trained for this skill.
- An online web session delivers agent training to individual agents so that training time does not negatively affect Service Level (for example, you may want to deliver 60% of interactions in less than 10 seconds).

To handle this use case, create a Proactive Campaign with 20 training work items. Route these work items to idle agents during low traffic times who are the best choice for this task (have adjacent skill but not the required skills).

Use Case #5: Automated follow-up list development

A Proactive Routing solution could be used for the following use case:

- Automatically develop a Calling List to follow up on inbound calls, abandoned during traffic peaks.
- A routing strategy detects the abandoned calls and adds a record to the specified list with the parameters of the incoming interaction.

Use the Calling List for an outbound Campaign that dials these customers during off peak hours to apologize and to follow up.

Use Case #6: Simple Outbound E-mail Campaigns

A Proactive Routing solution could be used for the following use case:

- Create a template for the outbound e-mail.

- Create an Outbound List with e-mail address as one of the record attributes.
- Configure a Campaign for proactive interaction routing.
- Routing strategy does not route interactions to the Agent Desktop, but instead sends outbound e-mails using integrated Genesys E-mail capabilities.

Features and Benefits

A Proactive Routing solution has the following features and benefits:

- Supports the new `outbound preview` media type (see Figure 13 on page 51).
- As the result of a treatment, an interaction of one media type can trigger an interaction of a different media type. For example, if an attempt to contact a customer fails, the solution can be configured to generate an e-mail with the text: `Tried to contact you. Please call this number` (see "Use Case #1: Multi-lingual Outbound Campaign" on page 23).
- Provides Outbound (customer contact) List management capabilities that are media-independent; Outbound Lists can include media types other than `voice` (Calling Lists).
- Provides the ability to map the definition of an Outbound List record attribute to a predefined `Business Attribute` in Configuration Manager (see Figure 13 on page 51).
- Provides the ability to push an Outbound List preview record to an agent from a routing strategy.
- Using new Outbound strategy-building objects (see "Strategy Samples" on page 93), provides the ability to:

  Create a record in a specified Outbound List from the logic of a routing strategy.

  Add a Do Not Call (DNC) item to a specified DNC list from a routing strategy or from Agent Desktop.

  Update a record in a specified Calling List from a routing strategy. This can be any result/update while processing another interaction of any type in a routing strategy.

  Reschedule a customer call on a Calling List from the logic of a routing strategy.
- Solution design ensures that if an agent is available and there is an outbound interaction that can be delivered to this agent, the interaction is delivered to the agent.
- Allows you to associate a routing strategy with an Outbound Campaign via a new routing target Selection object called `Campaign Group`.

- Provides access to proactive interaction data (see Figure 48 on page 87).
- Allows reporting on proactive record processing.
- Considers agent capacity rules when delivering proactive interactions to agents (see page 75).
- Proactive Interactions (records) being routed (not yet distributed to and accepted by an agent) are dynamically affected by changes that cancel the dialing need for particular proactive interaction.
- Addresses component failovers and temporary disconnects between components.
- Interactions delivered to Agent Desktop in `Push Preview` mode are Open Media interactions.
- When proactive interactions are delivered to agents in `Push Preview` mode, agents can exercise all currently available functionality.
- Agents can accept/reject interactions in `Push Preview` mode with a custom `Reason Code`.
- Interactions in `Push Preview` mode rejected by agents do not lose their place at the top of the Universal Routing Server queue because of the reject.
- Interactions in `Push Preview` mode not accepted by agents within a configured time-out are automatically rejected.
- Agents can directly request previewing the rest of a chain of Calling List records, bypassing the routing mechanism.
- Universal Routing Server will not distribute an interaction to the agent, who recently rejected the interaction (within a configured time interval in the past).

Proactive Routing Solution Task Flow

Table 1 summarizes the task flow for configuring and using a Proactive Routing solution

Table 1: Task Flow for configuring and using a Proactive Routing solution

Objective	Related Procedures and Actions
1. Configure Outbound	**1.** Install and configure Outbound Contact as described in the *Outbound Contact 7.6 Deployment Guide*. **2.** Configure the applicable Outbound objects for proactive routing as described in Chapter 2, "Configuring Outbound Contact for Proactive Routing" on page 31. **3.** , page 35 **4.** Configuring the Campaign Group object, page 37
2. Configure Multimedia	**1.** Install and configure Multimedia as described in the *Multimedia 7.6 Deployment Guide*. **2.** Obtain the technical license as described on page 45. **3.** Configuring the Interaction Server application object, page 46

Table 1: Task Flow for configuring and using a Proactive Routing solution (Continued)

Objective	Related Procedures and Actions
3. Configure Universal Routing and create strategies	**1.** Install and configure Universal Routing as described in the *Universal Routing 7.6 Deployment Guide*. **2.** Configure the proactive routing strategies: **a.** Opening the Routing Design window, page 53 **b.** Navigating to the Interaction Design location within IRD, page 54 **c.** Creating a new multimedia strategy, page 55 **d.** Editing an existing multimedia strategy, page 57. **3.** Configure strategies for agent-less processing of Campaign and Do Not Call List records using the routing strategy samples shown in the Appendix starting on page 93. **4.** Creating the Universal Routing Server environment option, page 67 **5.** Loading multimedia strategies, page 61.
4. Configure Agent Desktop	**1.** Install and configure Agent Desktop as described in the *Genesys Desktop 7.6 Deployment Guide*. **2.** Assigning capacity rules, page 76 **3.** Specifying login media types, page 79
5. Run a campaign	**1.** Verifying Push Preview mode, page 83. **2.** Logging into Outbound Contact Manager, page 84 **3.** Starting a campaign, page 85

Chapter

2 Configuring Outbound Contact for Proactive Routing

This chapter describes how to configure Outbound Contact for a Proactive Routing solution. It summarizes the Outbound Contact configuration objects that must be created, describes Configuration Manager entries specific to proactive routing, the Outbound Contact Server options that affect proactive routing, and changes in the communication protocol to support proactive routing.

The information in this chapter is divided among the following topics:

Installing Outbound Contact

The instructions in this chapter assume that the Genesys Outbound Contact product is already installed and running as described in the *Outbound Contact 7.6 Deployment Guide*. This includes Outbound Contact Manager.

Creating Outbound Contact Objects

The instructions in this chapter assume you have already created the following Outbound Contact objects using either Configuration Manager or Outbound Wizard as described in the *Outbound Contact 7.6 Deployment Guide*:

- `Calling List` objects, which are representations of tables in any database to which Outbound Contact components are given access. They contain records that store, among other information, a collection of phone numbers and other customer and business-related data.
- `Campaign` objects, which are flexible master plans that organize Calling Lists and Agent Groups (or Place Groups) for dialing calls and handling call results.
- A `Table Access` object, which defines the relationships among Calling List(s), Formats, and a database table. This object points to a database table of a specified format by providing a Database Access Point
- `Field` objects, which defines a field in a Calling List database table. Fields are single pieces of data (for example, a phone number) within a record.
- `Filter` objects, which specify the criteria for data selection from a database table. Outbound filters are applied to Calling Lists.
- `Timezone` objects, which Outbound Contact uses in call records to determine the customer contact's time zone.
- `Treatment` objects, which define what Outbound Contact Server should do with a call that does not reach the intended party.
- `Campaign Group` objects, which are defined as a Campaign (a set of Calling Lists) that is assigned to work resources such as an `Agent Group` or a `Place Group`.

> Note: The above objects can be created using the Outbound Wizard or in Configuration Manager. For general information on creating these objects, see the *Outbound Contact 7.6 Deployment Guide* and the *Outbound Contact 7.6 Outbound Contact Manager Help*. This chapter focuses on Configuration Manager entries specific to deploying a Proactive Routing solution.

Procedure: Opening Configuration Manager

Purpose: A number of procedures will require opening Configuration Manager to make configuration changes. This procedure summarizes the steps needed to login to the interface.

Start of procedure

1. From the `Start` menu on your PC, open the Configuration Manager login dialog window. The default path is `Start > Genesys Solutions > Framework > Configuration Manager > Start Configuration Manager`. As an alternative, click the Configuration Manager desktop shortcut.
2. Complete the login dialog and click `OK` to open Configuration Manager. Figure 3 shows an example Configuration Manager for a `Multi-Tenant` environment.

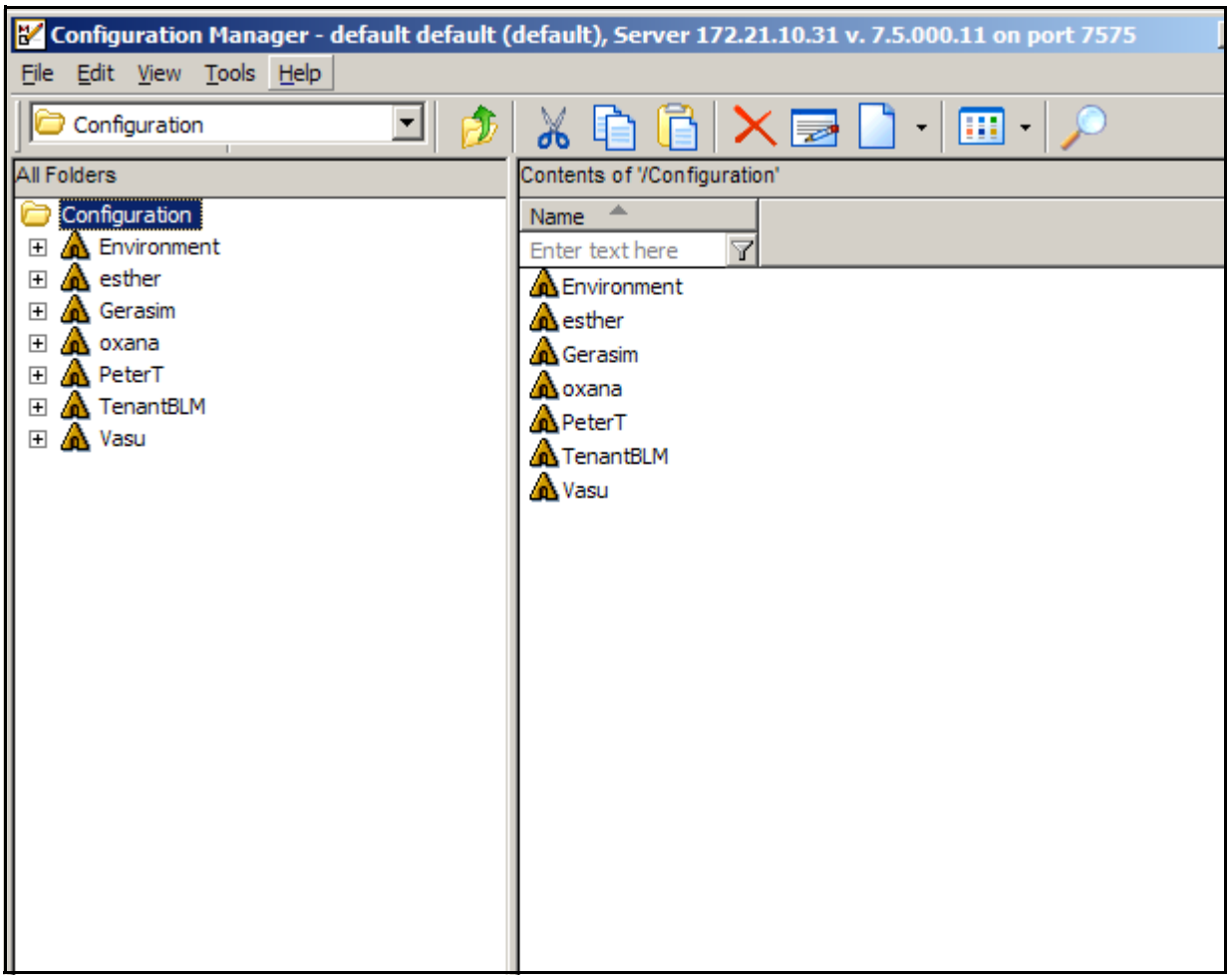

Figure 3: Configuration Manager, Example Multi-Tenant Environment

3. Expand the `Environment` folder (see Figure 4).

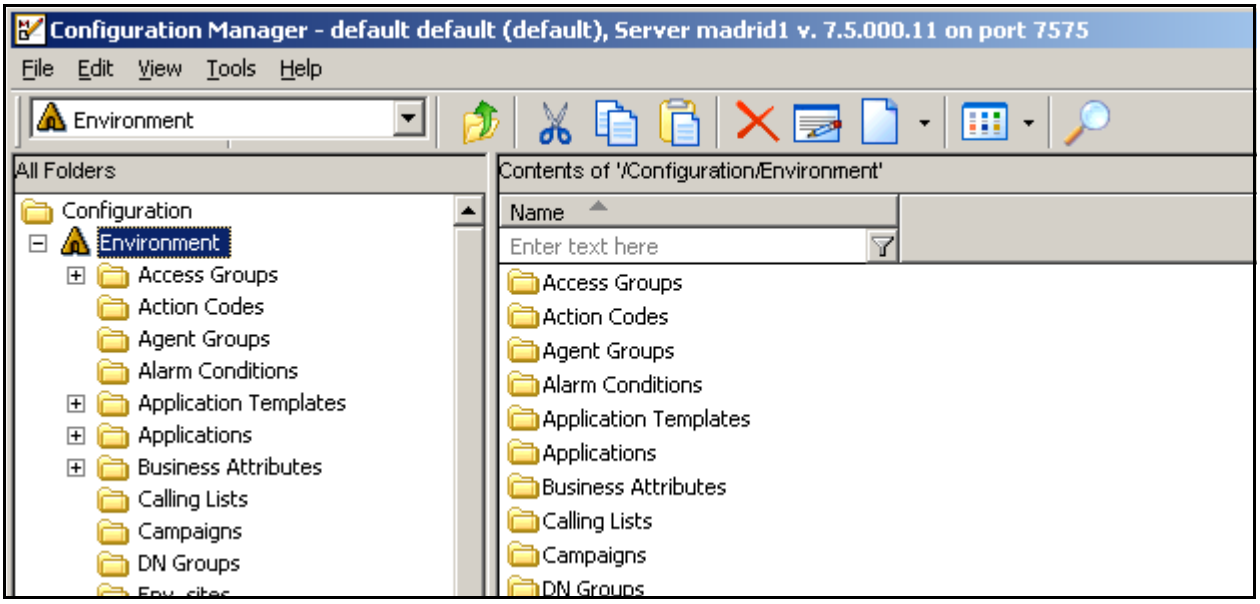

Figure 4: Configuration Manager, Example Environment Folder

End of procedure

External Services Protocol

Interaction Server uses External Services Protocol to communicate with servers that perform a specific service when requested to do so. Such servers are called *ESP servers*. Outbound Contact Server is an ESP server, as is E-mail Server Java when it generates an acknowledgment or autoresponse (although when E-mail Server Java processes incoming or outgoing e-mails, it functions as a media server).

One of the main purposes of ESP protocol is to provide a uniform way to call services provided by some servers from a routing strategy. Many multimedia-related objects in IRD (such as Forward, Autoresponse, Classify, and Screen) are implemented using ESP. When Universal Routing Server processes such an object in a strategy, it sends request for particular service to Interaction Server, which then redirects it to another server (such as E-mail Server, Chat Server, Classification Server) which provide the required service.

In the case of Outbound Contact Server, when Universal Routing Server processes the Outbound strategy-building objects in strategy (see “Outbound Objects” on page 93), it calls OCS (via Interaction Server) using ESP protocol to do particular tasks, such as updating a record or marking a record as “processed.” This means that if a strategy contains an Outbound object (such as Processed) and no ESP port is configured in OCS, then the call of this Processed object will fail and record will be never marked as “processed.”

Procedure:
Configuring Outbound Contact Server's ESP port

Purpose: Configure the `ESP Port` in the `Server Info` tab so ESP protocol can be used

Start of procedure

1. Login to Configuration Manager as described in Opening Configuration Manager, page 32.
2. Expand the `Applications` folder, then select the `Tenant` and Outbound Contact Server `Application` object (see Figure 5).

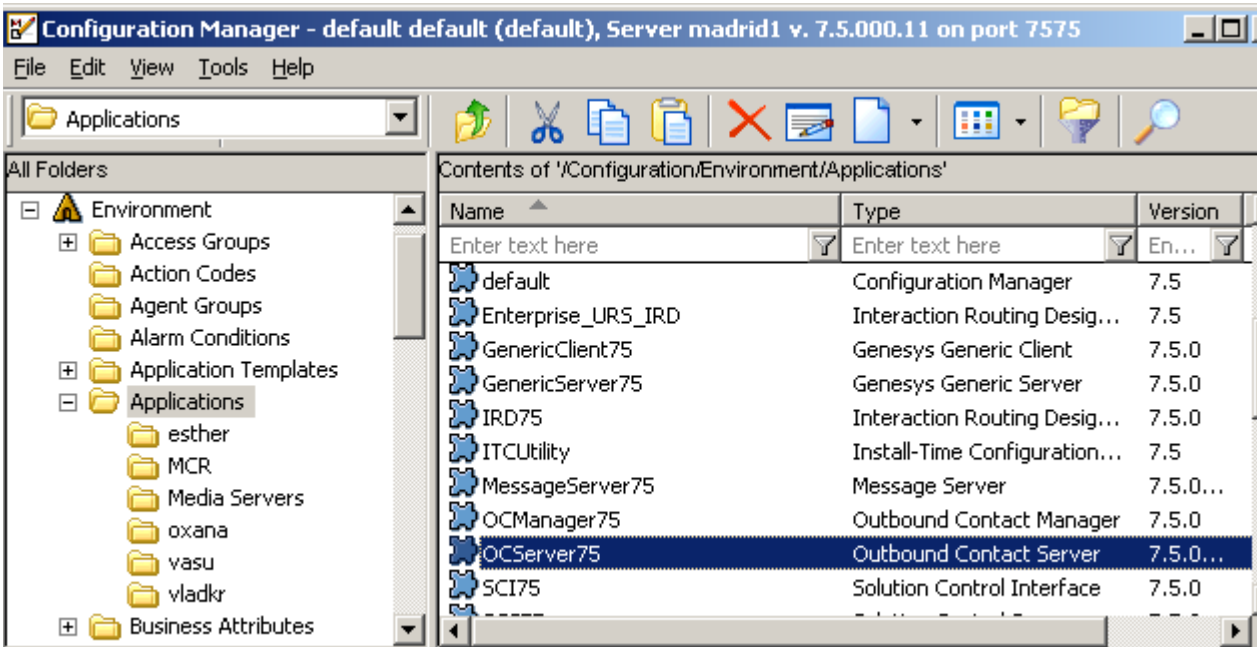

Figure 5: Configuration Manager, Example Outbound Server Application

3. Double-click the Outbound Server `Application` object and select the `Server Info` tab.
4. Add a separate port of `ESP` (External Service Protocol) type to the `Ports` list. Figure 6 shows an example entry in Configuration Manager:

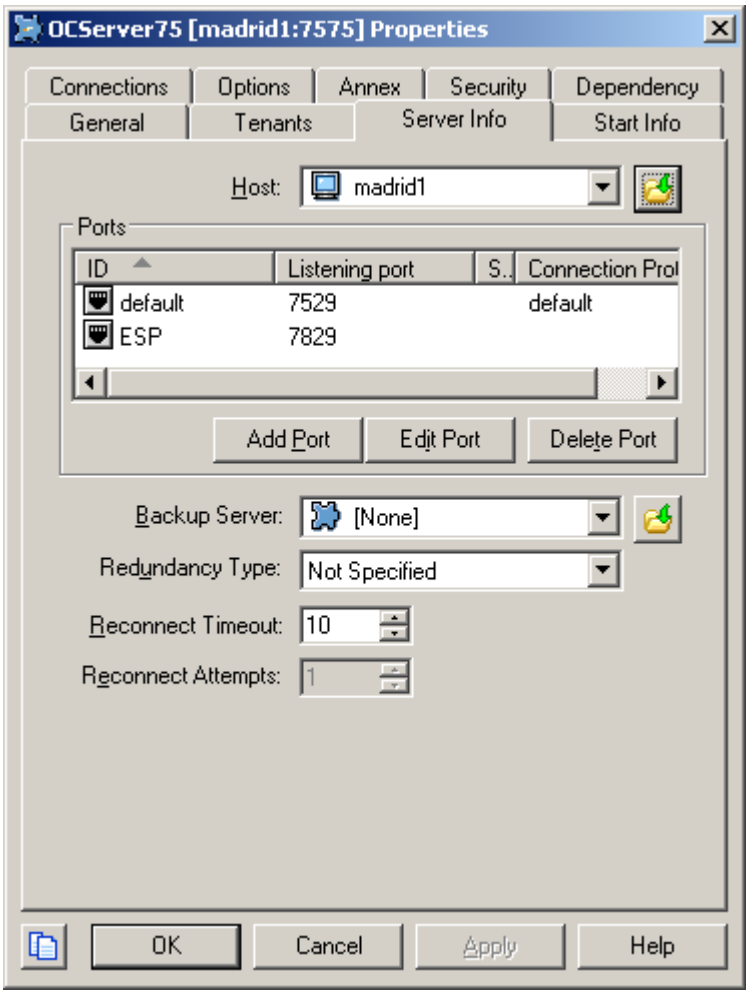

Figure 6: Outbound Contact Server Application, Server Info Tab

Interaction Server uses the `ESP` port to connect to OCS. If the `ESP` port is not present, or is set to `0`, or is not an integer value, Interaction Server does not connect to OCS and so OCS/External Service Protocol functionality is disabled.

End of procedure

Next Steps

- Configuring the Campaign Group object

Procedure:
Configuring the Campaign Group object

Purpose: Configure a `Campaign Group` object that uses the `Push Preview` dialing mode. `Campaign Group` objects are located within a subfolder under the `Campaign` object in Configuration Manager. Figure 7 shows example `Campaign Group` objects.

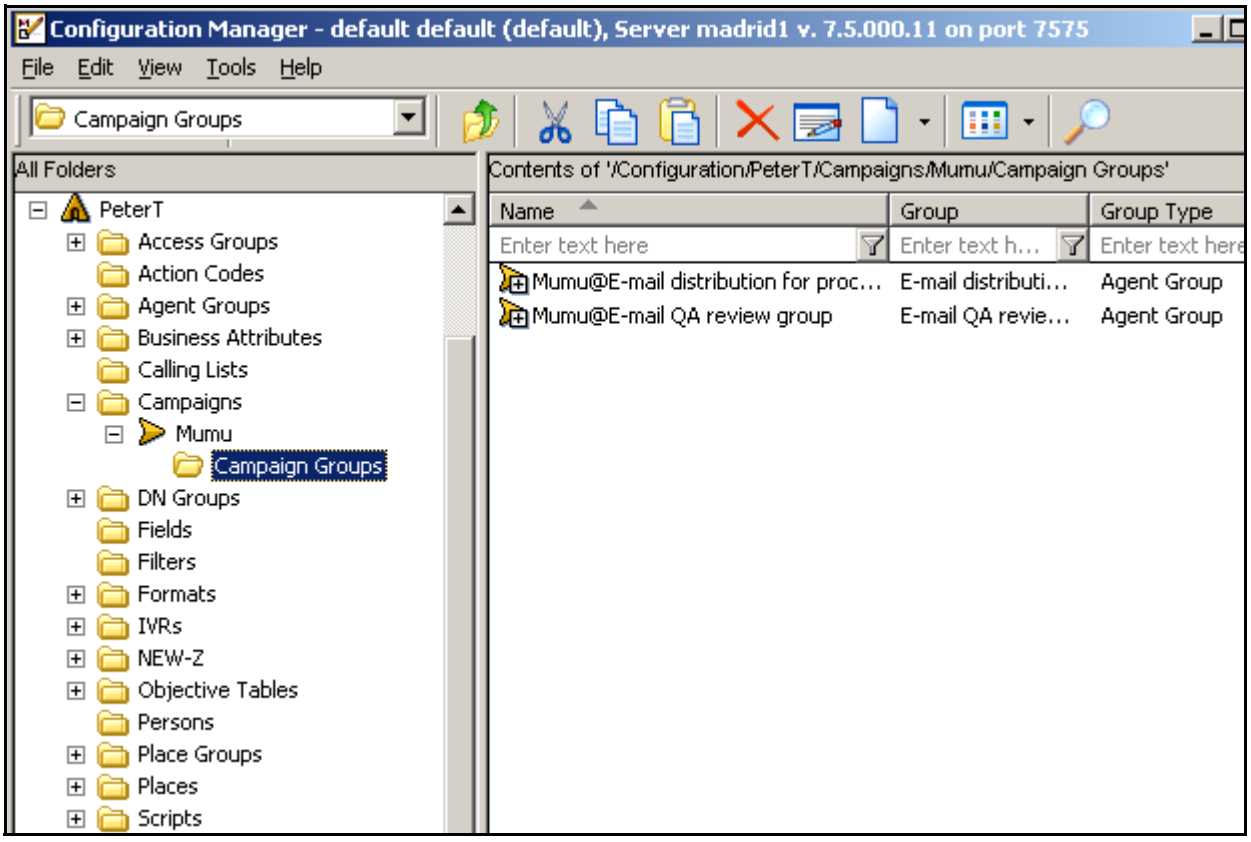

Figure 7: Example Campaign Group Object

Start of procedure

1. Open Configuration Manager as described in Opening Configuration Manager, page 32.
2. To create the `Campaign` object under the `Campaigns` folder, right-click the `Campaigns` folder and select `New` > `Campaign`.
3. Click the `+` sign on the `Campaign` object in order to show the `Campaign Group` folder.
4. Right-click this folder and select `New` > `Campaign Group`.
5. Complete the `General` tab. Figure 8 shows example entries:

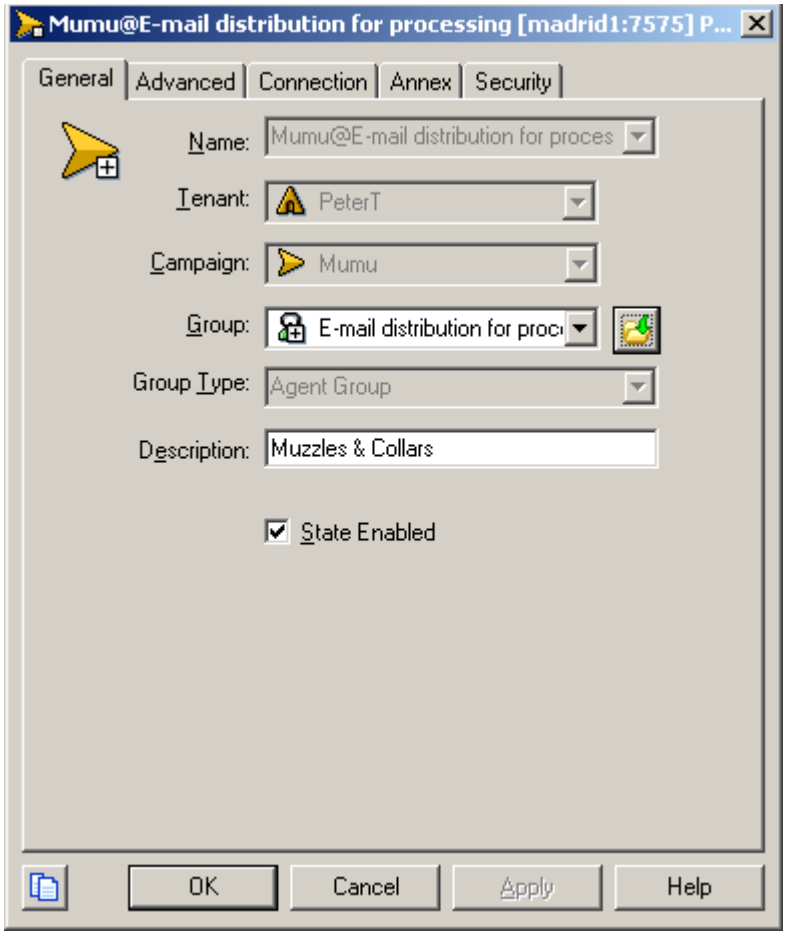

Figure 8: Campaign Group Object, Example General Tab

6. Click the `Advanced` tab of the `Campaign Group` object.
7. In the `Dialing Mode` field of the `Campaign Group` object, select `Push Preview`.

Note: A Preview Only license limits the use of OCS to this one dialing mode. When a user licensed for Preview Only selects a different dialing mode and attempts to start a Campaign, OCM displays a message to alert the user. A full license is required to run Campaigns in all dialing modes.

For information on when you need to stop and re-start a Campaign if switching dialing modes, see the *Outbound Contact 7.6 Outbound Contact Manager Help*.

---

8. In the `Interaction Queue` field, select the queue that OCS will deliver interactions to in `Push Preview` mode. This is also the queue that agents will login to in order to receive interactions generated in `Push Preview` mode (see Figure 35 on page 72). When a session starts, Outbound Contact Server pushes interactions generated in `Push Preview` mode to the named interaction queue on Interaction Server.

9. Configure the `Max Queue Size` field for the number of records to buffer to Interaction Server.

Figure 9 shows example entries in the `Advanced` tab.

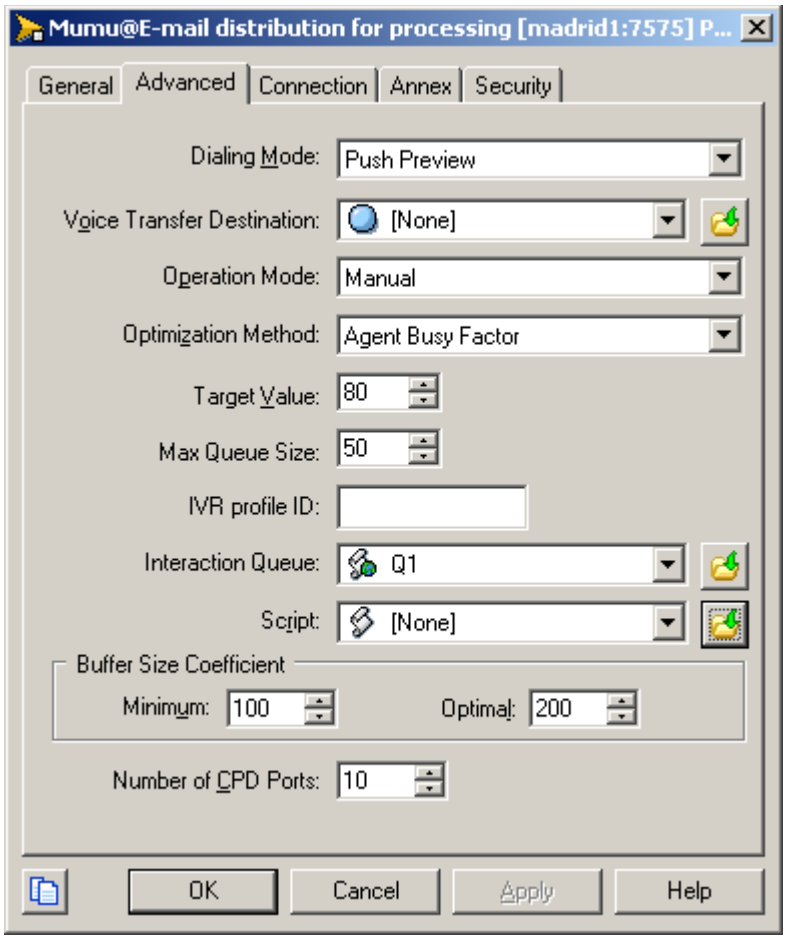

Figure 9: Campaign Group Object, Advanced Tab

Check that the `Connection` tab of the Campaign Group object contains the name of your Interaction Server (see Figure 10).

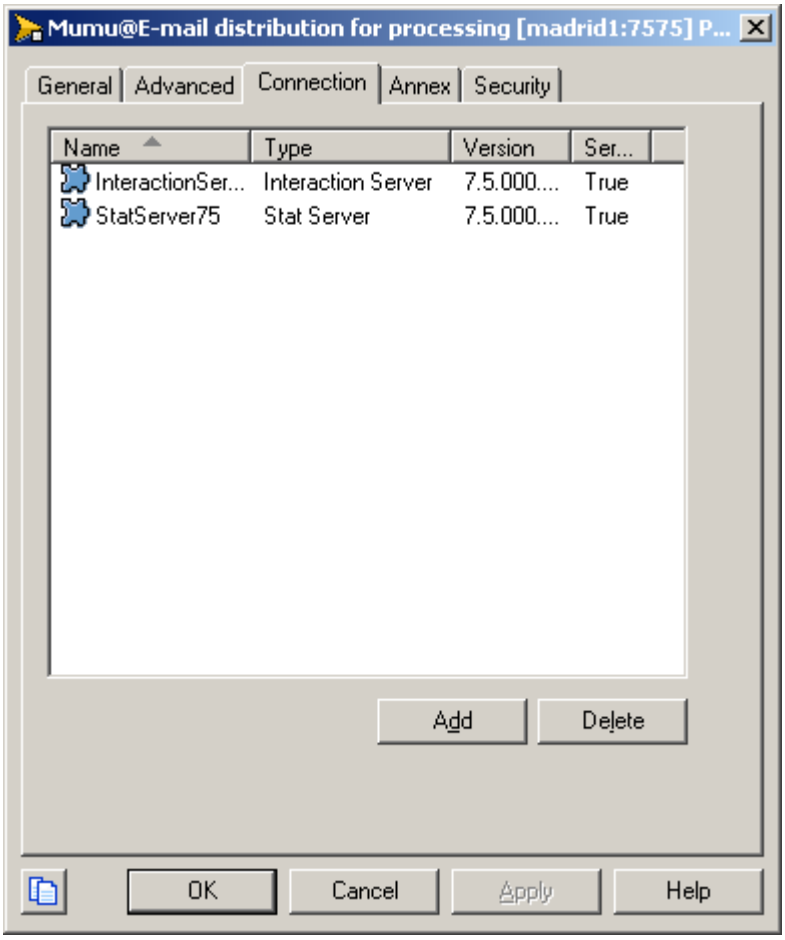

Figure 10: Campaign Group Object, Connection Tab

End of procedure

Outbound Contact Server options specific to Proactive Routing

In addition to the usual Outbound Contact Server configuration, there are two options that are specific to Proactive Routing. This section describes the `direct-personal-callback` and `interaction-media-type` options.

direct-personal-callback

Default Value: `TRUE`

Valid Values: `TRUE/FALSE` or `YES/NO`

This option controls how `personal callback` records are processed. When the value is set to `TRUE`, OCS will submit the personal callback interaction directly to the agent. When the value is set to `FALSE`, OCS will submit the personal

callback interaction to an interaction queue assigned to the Campaign Group. This allows the routing strategy to distribute the interaction.

Note: This option is only used with Interaction Server in Push Preview mode.

interaction-media-type

Default Value: outboundpreview
Valid Values: Any valid value for the Media Type Business Attribute

This option defines the media type of the interaction submitted to Interaction Server. To support proactive routing when submitting interactions generated in Push Preview mode to Interaction Server, Outbound Contact Server creates interactions with the outboundpreview media type by default. Normally, you will not change this default for a Proactive Routing solution. This option also can be configured at the Calling List object level.

Note: The OCS template does not contain the interaction-media-type option. Define the option only if you do not want to use the default of outboundpreview. Any media type that has been configured as a Media Type Business Attribute in Configuration Manager can be used as the value for this option.

Procedure: Configuring Outbound Contact Server options for Proactive Routing

Purpose: This procedure describes how to edit the configuration of Outbound Contact Server options that are specific to Proactive Routing.

Start of procedure

1. Open Configuration Manager as described in Opening Configuration Manager, page 32.
2. Open the Outbound Contact Server Application object.
3. Click the Options tab.
4. Locate the direct-personal-callback option in the options list.
5. Double-click the option if you wish to change the value.
6. Click OK to apply your changes.
7. If the interaction-media-type option does not appear in the list, and you do not want to use the default value of outboundpreview, you must create the option. Click the New Option icon to open the dialog box.

8. Enter the option name `interaction-media-type` and the desired value of the option.
9. Click `OK` to save the option and its value.

End of procedure

Communication Protocol Modifications

Proactive routing interactions use the standard API of Interaction Server (similar to User Events in voice T-Server). The content of specific protocol messages is the same as the Outbound Desktop protocol, currently used for processing of Outbound voice calls/previews. All chain/record processing functionality, implemented for Outbound Voice, is supported for proactive interaction routing.

Modifications for Proactive Routing

This section shows the modifications already made to the Outbound Contact Server (OCS) and Agent Desktop communication protocol in order to enable proactive routing.

- Agent Desktop uses this protocol to send requests to OCS.
- OCS uses it to send information and acknowledgments to the Agent Desktop and the Outbound List (Calling List) database.

To support proactive routing, Genesys added certain fields and attributes the User Event data structure.

User Event Modifications

User Events, which include attached User Data, are messages that provide a documented protocol of the interactions between OCS and the Agent Desktop application. There are two types of User Events:

1. Agent desktop request to OCS. All messages that travel from the desktop to OCS have the key `GSW_AGENT_REQ_TYPE`.
2. OCS to desktop, either a response to a desktop request, or an unsolicited notification from OCS. All messages that travel from OCS to the desktop have the key `GSW_USER_EVENT`.

Genesys modified this second type of User Event protocol to support proactive routing.

Table 2 shows the additional data keys added that enable proactive interaction functionality in the desktop (shown for information only).

Table 2: Proactive Interaction Attached Data

Data Key	Type	Description
GSW_AGENT_ID	String	AgentID of the agent assigned to the proactive interaction record.
GSW_SWITCH_DBID	Integer	DBID of the Switch.

Note: If a proactive interaction was created for a personal callback, the `GSW_AGENT_ID` and `GSW_SWITCH_DBID` attributes identify the agent who scheduled that callback so URS can make a decision on how to distribute it.

Media Type Modifications

Table 3 provides information about identifying the media types that correspond to the `Media Type Business Attribute` in Configuration Manager. `GSW_CONTACT_MEDIA_TYPE` defines how to contact the customer.

Table 3: Media Type Business Attribute

Data Key	Type	contact_info_type Field	Description
GSW_CONTACT_MEDIA_TYPE	string	0	any (NoContactType)
		1	voice (HomePhone)
		2	voice (DirectBusinessPhone)
		3	voice (BusinessWithExt)
		4	voice (Mobile)
		5	voice (VacationPhone)
		8	voice (VoiceMail)
		10	e-mail (E-mail)

Note: For more information on Outbound Contact communication protocols, including those used for Telephony and User events, consult the *Outbound Contact 7.6 Reference Manual*, specifically the section on proactive interaction protocols.

Chapter

3 Configuring Multimedia for Proactive Routing

This chapter describes the required technical license, the communication between Outbound Contact Server and Interaction Server, and the instructions for configuring the Interaction Server `Application` object.

The information in this chapter is divided among the following topics:

Installing Multimedia

The instructions in this chapter assume that the Genesys Multimedia product is already installed and running as described in the *Multimedia 7.6 Deployment Guide*.

Obtaining the Technical License

In the 7.6 release of Outbound Contact, dialing modes such as `Push Preview` used for proactive routing, do not requires a technical license. Multimedia's Interaction Server does require a technical license for Open Media interactions (`ics_custom_media_channel` feature). For more information, refer to the *Genesys 7 Licensing Guide*, Appendix B, Genesys Feature Names.

OCS and Multimedia Communication

Proactive routing requires communication between Outbound Contact Server (OCS) and Multimedia's Interaction Server. OCS and Interaction Server communicate with each other in several ways:

- Submitting/stopping interactions (direction: from OCS to Interaction Server).

  Uses Interaction Server API for submitting a new interaction and stopping an existing interaction. Following messages are used:

  `RequestRegisterClient` for registration with Interaction Server.

  `RequestSubmit` for submitting an interaction.

  `RequestStopProcessing` for stopping the processing of an interaction.

  Interactions created upon request from OCS may be finished by OCS, after getting a command, such as DoNotCall. In addition, interactions may also be finished by Agent Desktop and routing strategies.
- Preview specific processing (direction: from Agent Desktop to OCS through Interaction Server). Examples: request chain, do not call, reschedule, cancel, add record, record processed.
- Interaction transfer between agents (direction: from Agent Desktop to Interaction Server).
- Making "online" media calls (IM, voice) (direction: from Agent Desktop to a Media Server).
- Media call transfers between agents (direction: from Agent Desktop to a Media Server and Interaction Server).
- Logging in UCS (direction: from Agent Desktop and Interaction Server to UCS).

Procedure: Configuring the Interaction Server application object

Purpose: Configure the Interaction Server `Application` object to enable communication with OCS.

Start of procedure

1. Open Configuration Manager as described in Opening Configuration Manager, page 32.
2. Open the `Applications` folder.
3. Open the Interaction Server `Application` object.
4. Add your Outbound Contact Server in the `Connections` tab. Figure 11 shows an example entry.

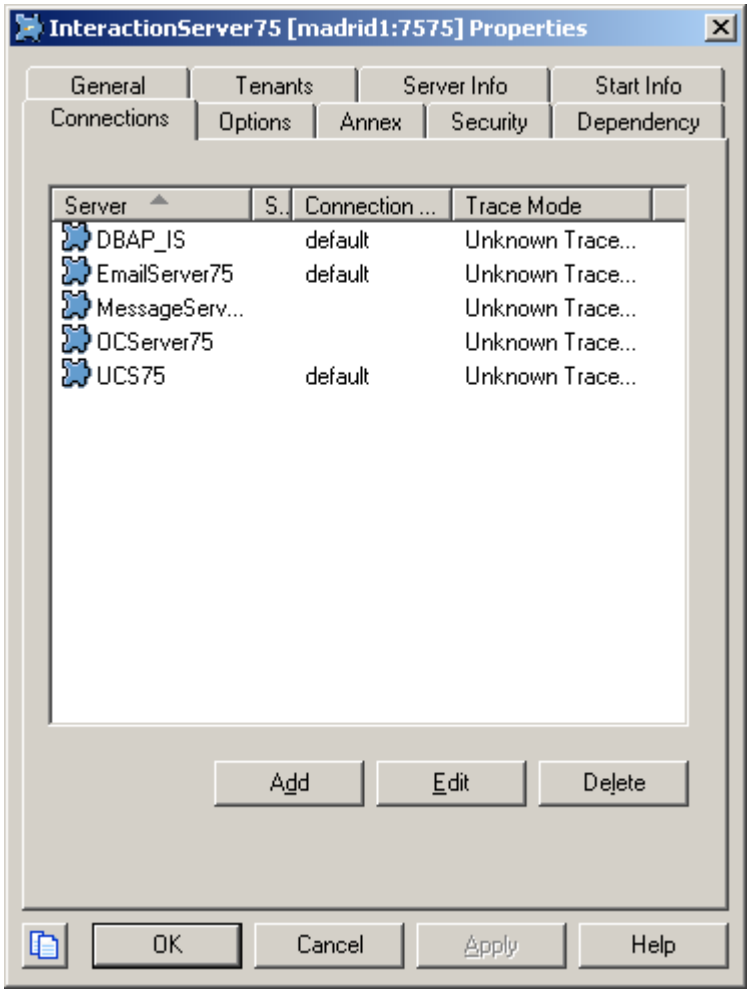

Figure 11: Interaction Server Application Object, Connections Tab

Other than adding Outbound Contact Server, there are no other special entries for Proactive Routing.

End of procedure

Chapter

4 Configuring Universal Routing for Proactive Routing

This chapter describes the new Outbound strategy-building objects for use when creating “agent-less” proactive routing strategies, how to open the window for creating proactive routing strategies, loading strategies on virtual routing points, setting an option that lets Universal Routing Server and Outbound Contact Server communicate, routing based on agent capacity, and general information on configuring proactive routing strategies.

The information in this chapter is divided among the following topics:

Installing Universal Routing

The instructions in this chapter assume that the Genesys Universal Routing product is already installed and running as described in the *Universal Routing 7.6 Deployment Guide*.

Strategy Support for Proactive Routing

Note: An appendix on page 93 contains sample strategies.

Interaction Routing Designer (IRD) provides strategy-building objects that support Genesys Outbound Contact and proactive routing. Figure 12 shows the Routing Design window, used for creating and editing strategies, after clicking the Outbound icon to drop down the Outbound objects toolbar.

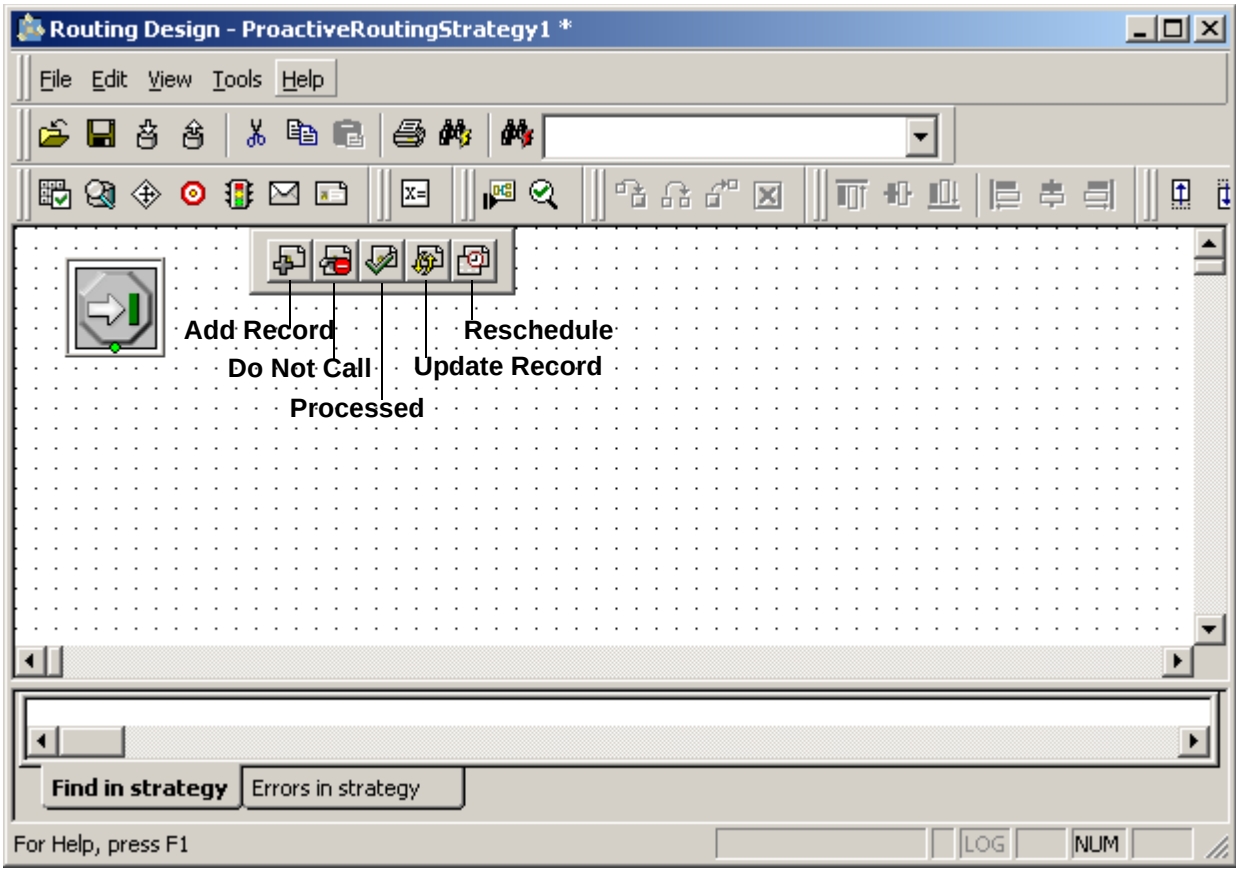

Figure 12: Outbound Toolbar in IRD's Routing Design Window

Use these objects for automatic ("agent-less") building of customer Calling Lists, to finish processing Calling List records, to reschedule customer calls, and to update Calling List records. You can also add customer records to Do Not Call lists from within a strategy.

Note: In addition to the appendix, you can also find technical background information on these objects in the *Universal Routing 7.6 Reference Manual*.

Using the Outbound Objects

You use the Outbound objects in routing strategies that route interactions with a Media Type of `outbound preview` (see Figure 13).

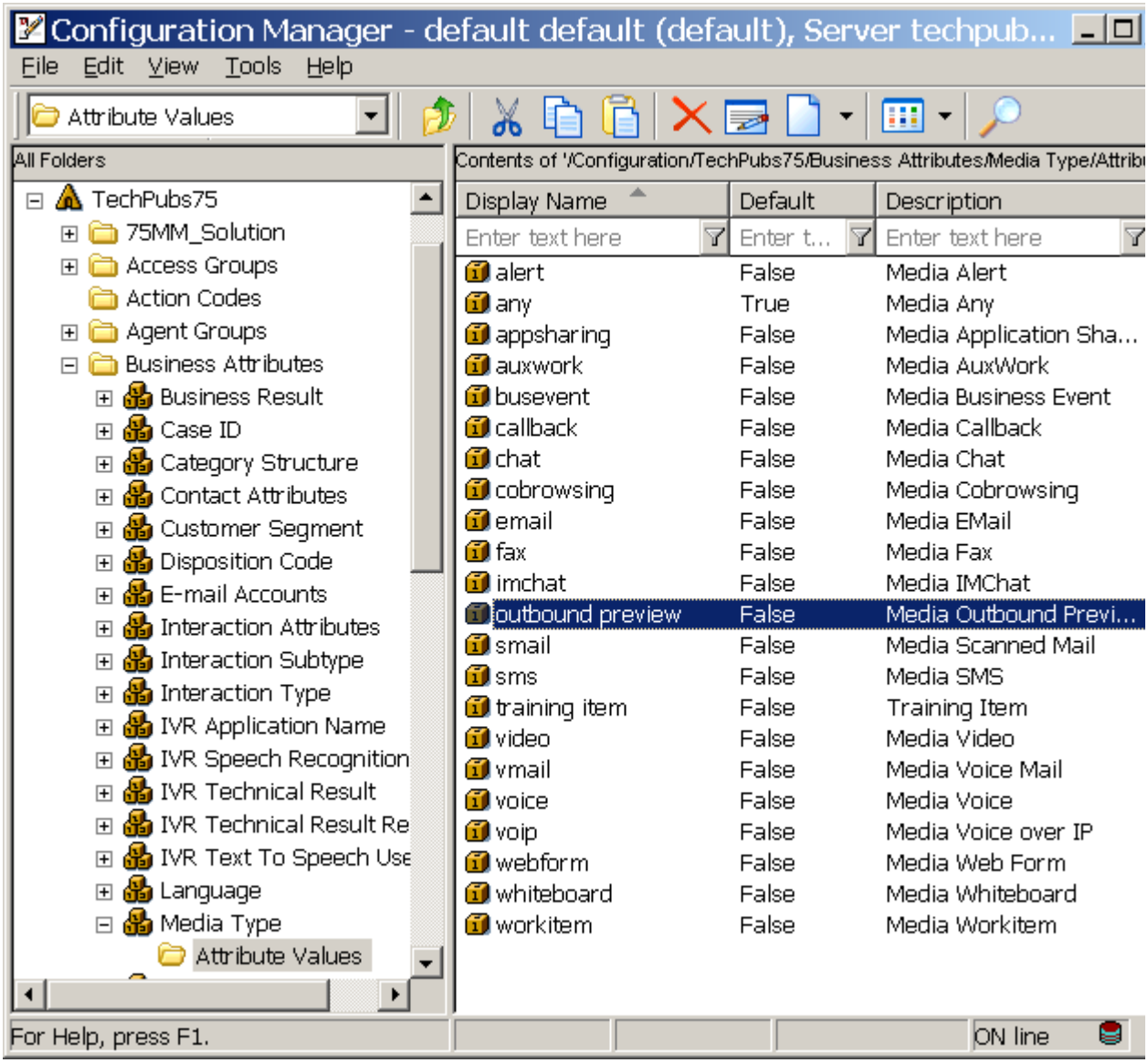

Figure 13: Business Attributes Folder, Outbound Preview Media Type

These types of strategies are contained in business processes created in IRD's `Interaction Design` window.

About Business Processes

Figure 14 shows an example business process in IRD's `Interaction Design` window called `BP_7.5`.

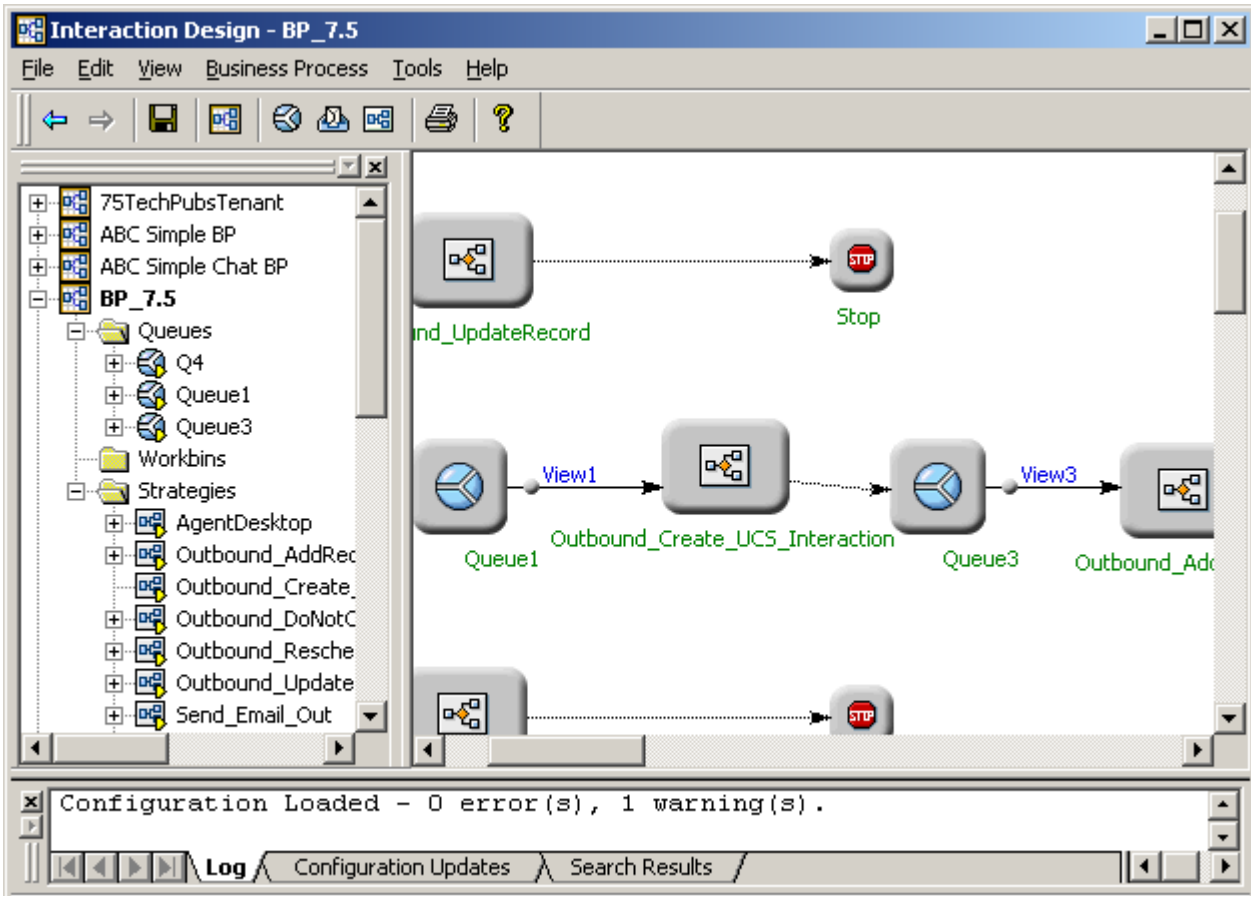

Figure 14: Business Process in Interaction Design Window

Objects within business processes define the interaction processing steps that enable you to accomplish specific business objectives. To do this, a business process uses queue, view, strategy, and workbin objects. When multiple business processes are connected via queues, this creates an *interaction workflow*. For more information on business processes, start with *Universal Routing 7.6 Interaction Routing Designer Help*. Also see *Universal Routing 7.6 Business Process User's Guide*.

Procedure:
Opening the Routing Design window

Start of procedure

1. From the `Start` menu on your PC, open the Interaction Routing Designer login dialog window. The default path is `Start > Genesys Solutions > Routing > Interaction Routing Designer > Start Interaction Routing Designer`.
2. Complete the login dialog and click `OK`. The Interaction Routing Designer main window opens. Figure 15 shows the window with example strategies.

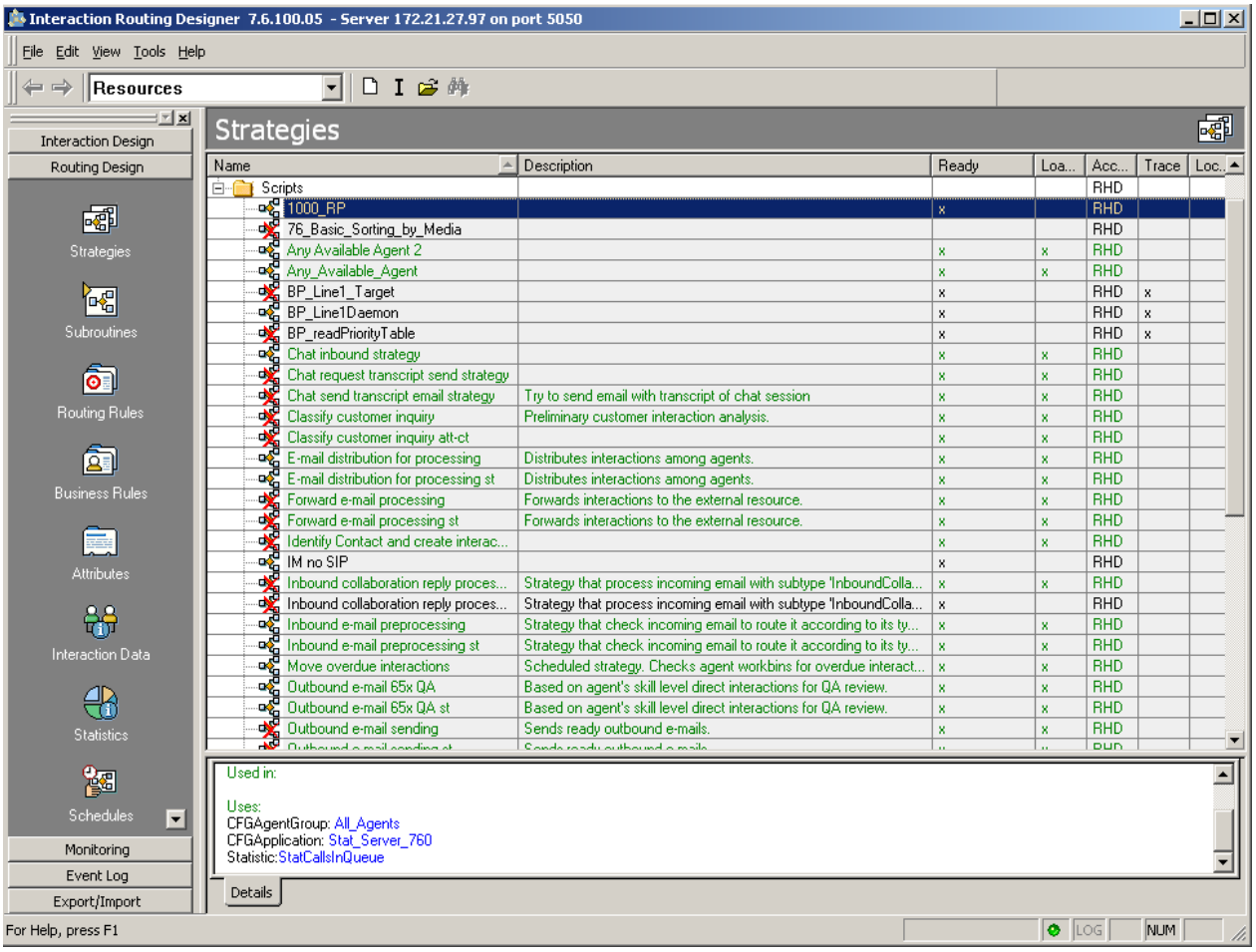

Figure 15: Interaction Routing Designer Main Window

End of procedure

Procedure:
Navigating to the Interaction Design location within IRD

Purpose: When processing multimedia interactions (such as `outbound preview`), you open the `Routing Design` window from a location within IRD called `Interaction Design`.

Start of procedure

1. Run Interaction Routing Designer as described in Opening the Routing Design window, page 53.
2. On the left side of the IRD main window, click the `Interaction Design` shortcut bar (see Figure 16).

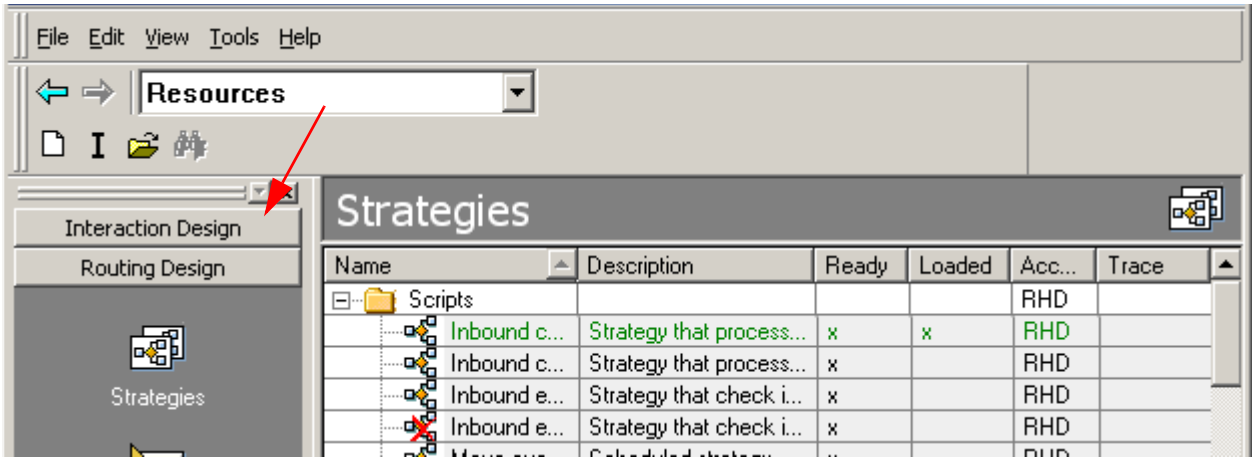

Figure 16: Interaction Design Shortcut Bar

The window now lists existing business processes. A `Business processes` icon appears on the left (see Figure 17).

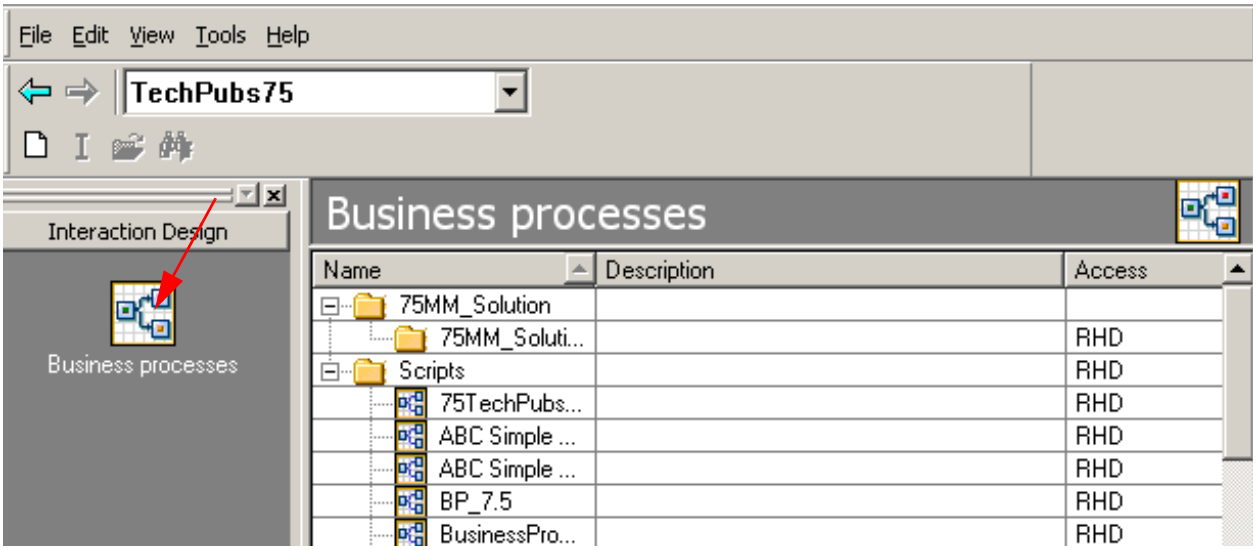

Figure 17: Business Process List View

End of procedure

Next Steps

- If you wish to create a new multimedia strategy, see Creating a new multimedia strategy.
- If you wish to edit an existing multimedia strategy, see Editing an existing multimedia strategy.

Procedure: Creating a new multimedia strategy

Purpose: To create a new multimedia strategy from inside the `Interaction Design` window. You must first create a new business process.

Start of procedure

1. Click the `Business Processes` icon on the left side of the window (see Figure 17).
2. Select `New` from the `File` menu. The `Interaction Design` window opens. IRD gives the business process a temporary name, which you can edit. Empty `Strategies` and `Subroutines` folders also appear (see Figure 18).

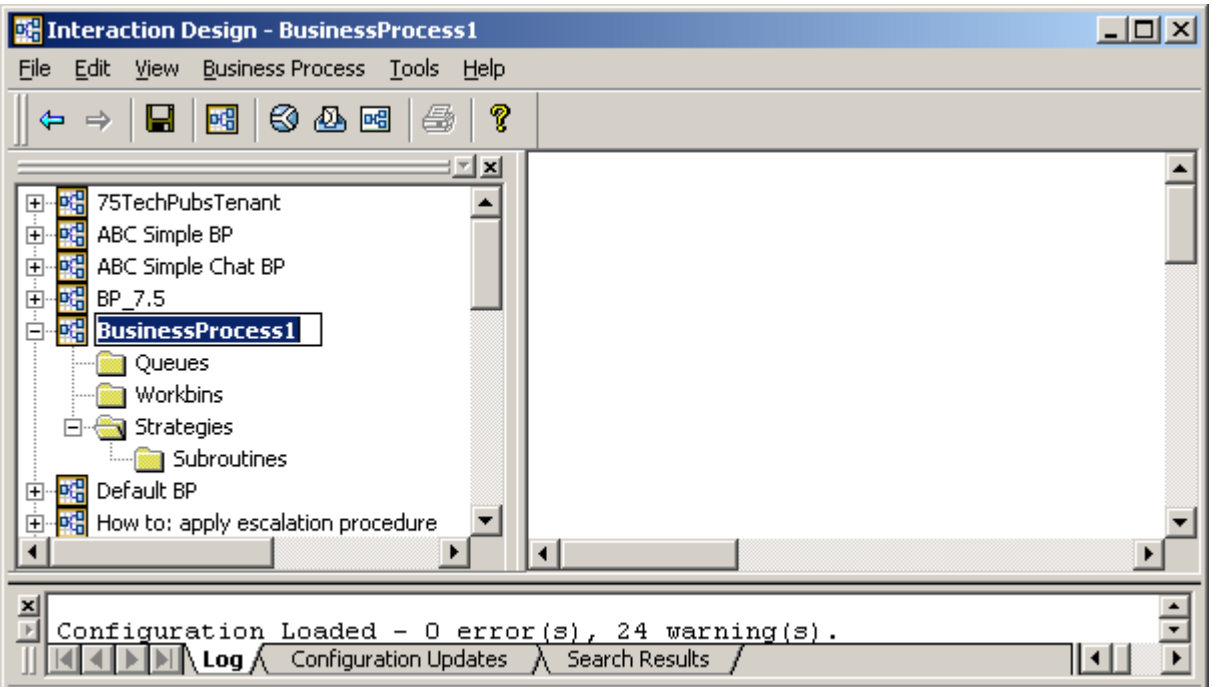

Figure 18: New Business Process With Temporary Name

3. Name, create, and save the `Business Process` object.
4. To create a new multimedia strategy, one method is to click the `Business Process` menu and select `New Strategy`. The `New` dialog box opens (see Figure 19).

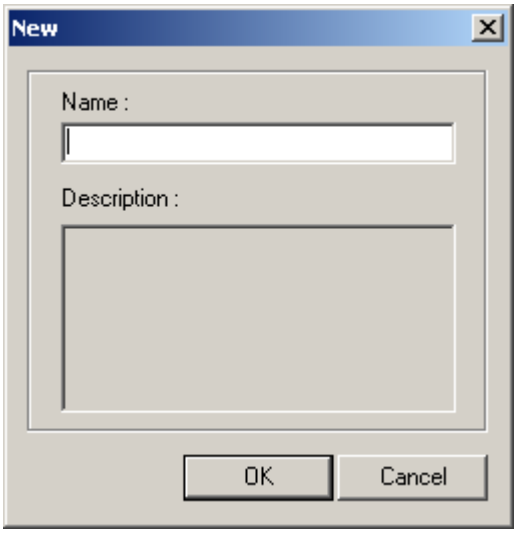

Figure 19: New Dialog Box for Creating New Strategy

Name and describe the strategy and click `OK`. An empty `Routing Design` window opens containing only an entry object (see Figure 20).

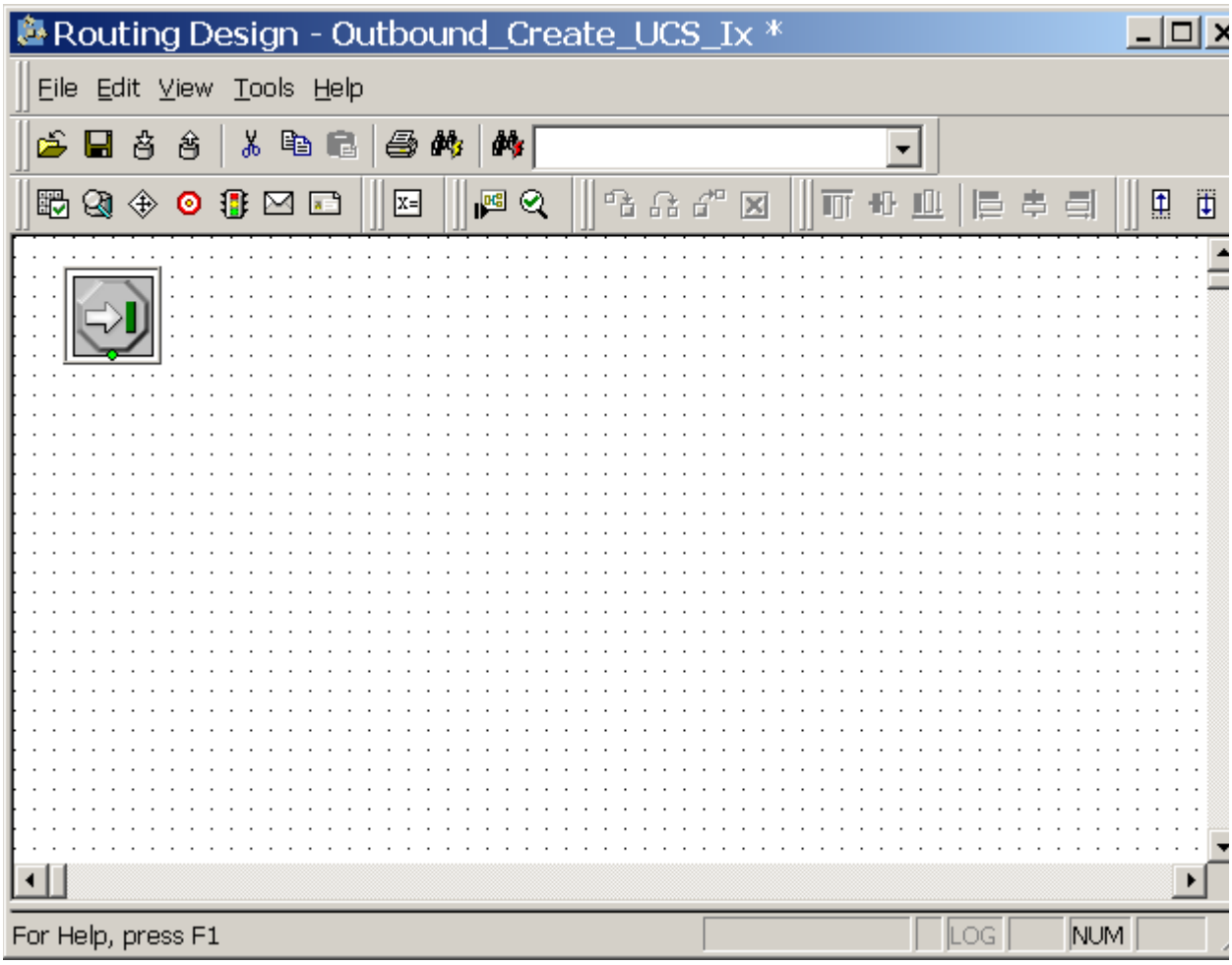

Figure 20: Routing Design Window

5. Create the strategy as described in the *Universal Routing 7.6 Interaction Routing Designer Help*. Also refer to the *Universal Routing 7.6 Business Process User's Guide*. For sample strategies, see page 93.

End of procedure

Next Steps

- Loading multimedia strategies

Procedure: Editing an existing multimedia strategy

Purpose: To edit an existing multimedia strategy contained in a business process.

Start of procedure

1. Double-click the `Business Processes` icon (see Figure 17 on page 55) to bring existing business processes into view.
2. Double-click an existing business process row. The `Interaction Design` window opens. Figure 21 shows the window when editing an existing business process called `BP_7.5`.

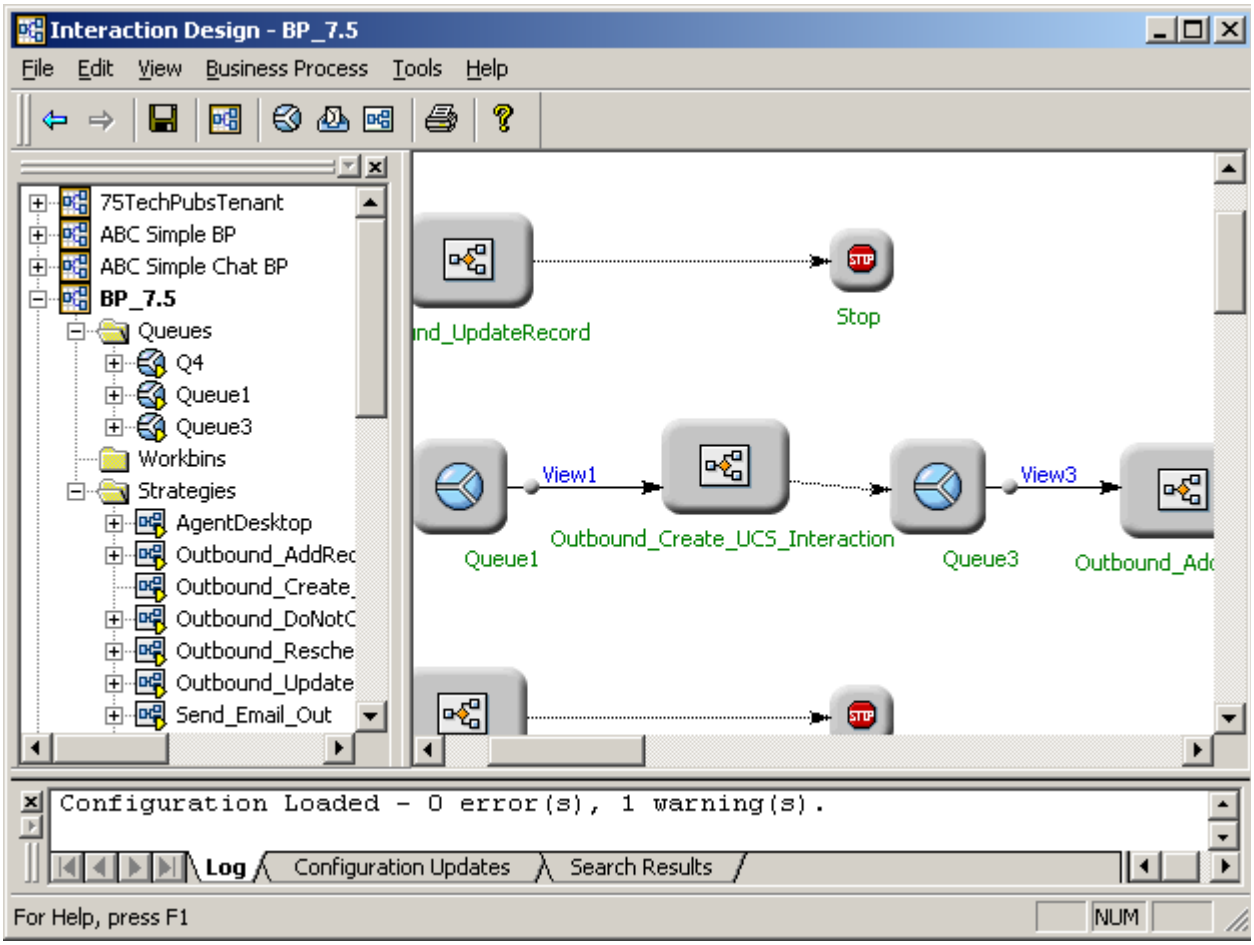

Figure 21: Interaction Design Window

Assume you wish to edit the strategy `Outbound_Create_UCS_Interaction` shown in Figure 21 on page 58.

3. To edit a strategy in the `Interaction Design` window, locate it in the browser area of the `Interaction Design` window. Right-click the strategy and select `Edit/View` strategy from the shortcut menu (see Figure 22)

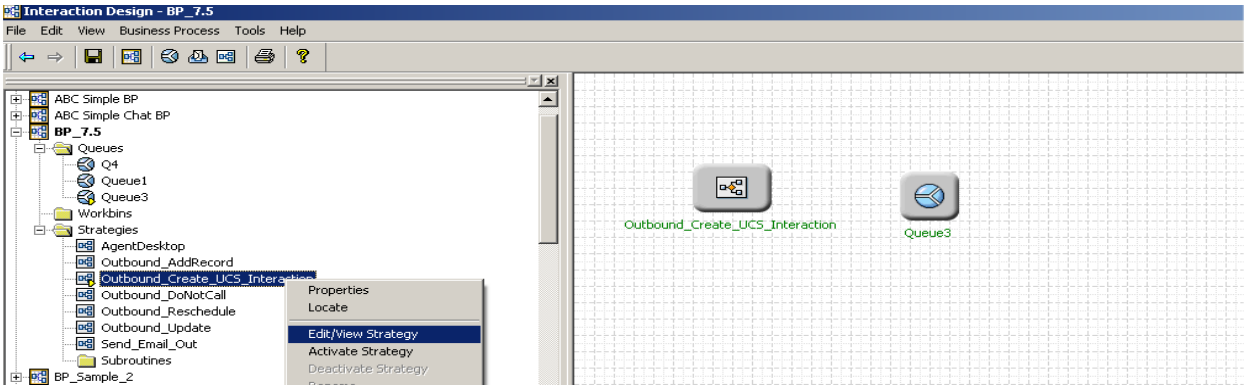

Figure 22: Editing a Strategy in Interaction Design

> Note: If the strategy is loaded on a virtual routing point, a message displays prompting you to unload the strategy.

Assuming you have access to where the graphical portion of the strategy is stored (`.rbn` file), the strategy opens in the `Routing Design` window (see Figure 23).

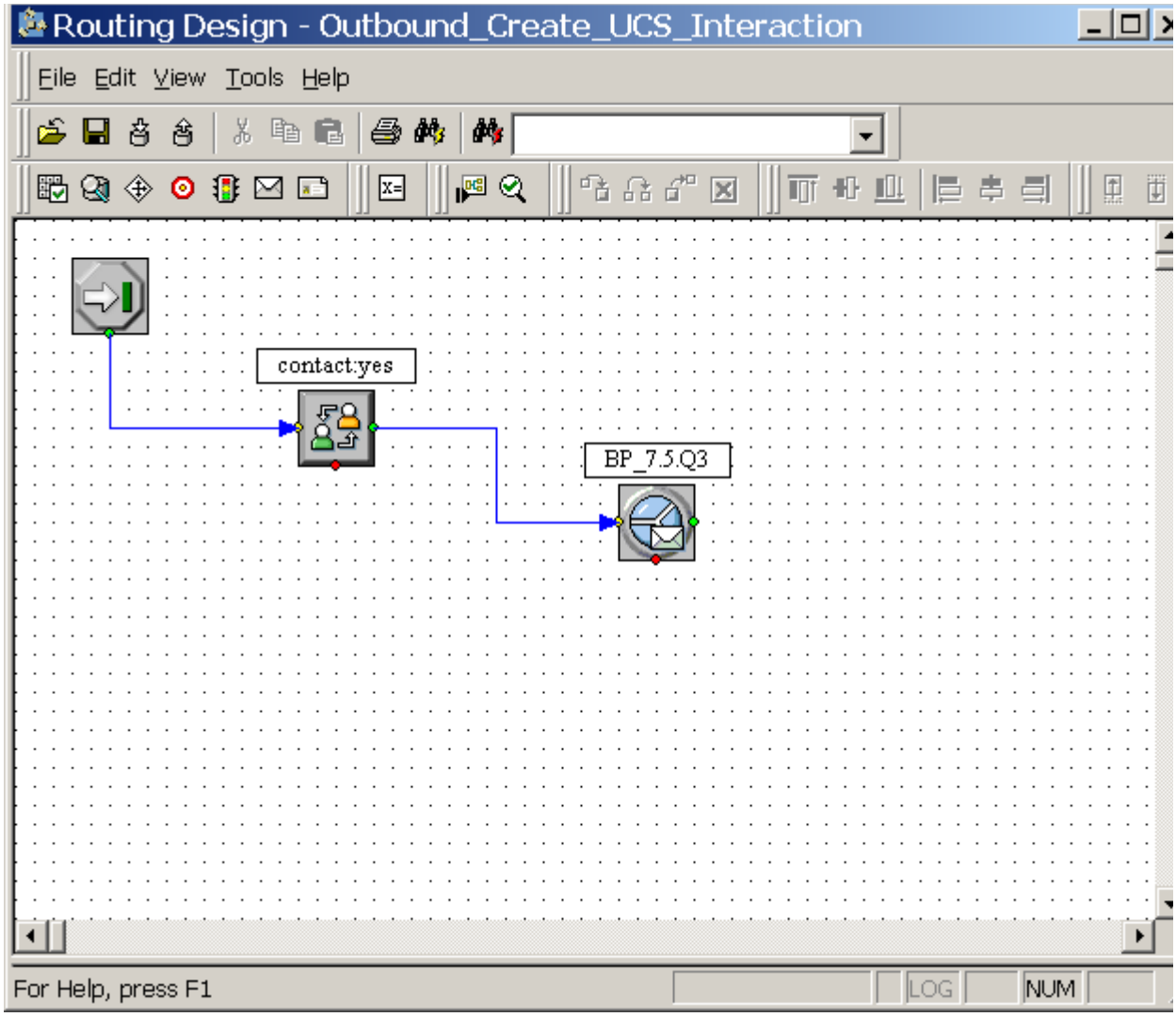

Figure 23: Strategy in Routing Design Window

4. Edit the strategy as described in the *Universal Routing 7.6 Interaction Routing Designer Help*. You can also refer to the *Universal Routing 7.6 Business Process User's Guide*. For sample strategies, see page 93.

End of procedure

Next Steps

- Loading multimedia strategies

Independent Objects Folder

IRD's `Interaction Design` window has a folder named `Independent Objects` (see Figure 24).

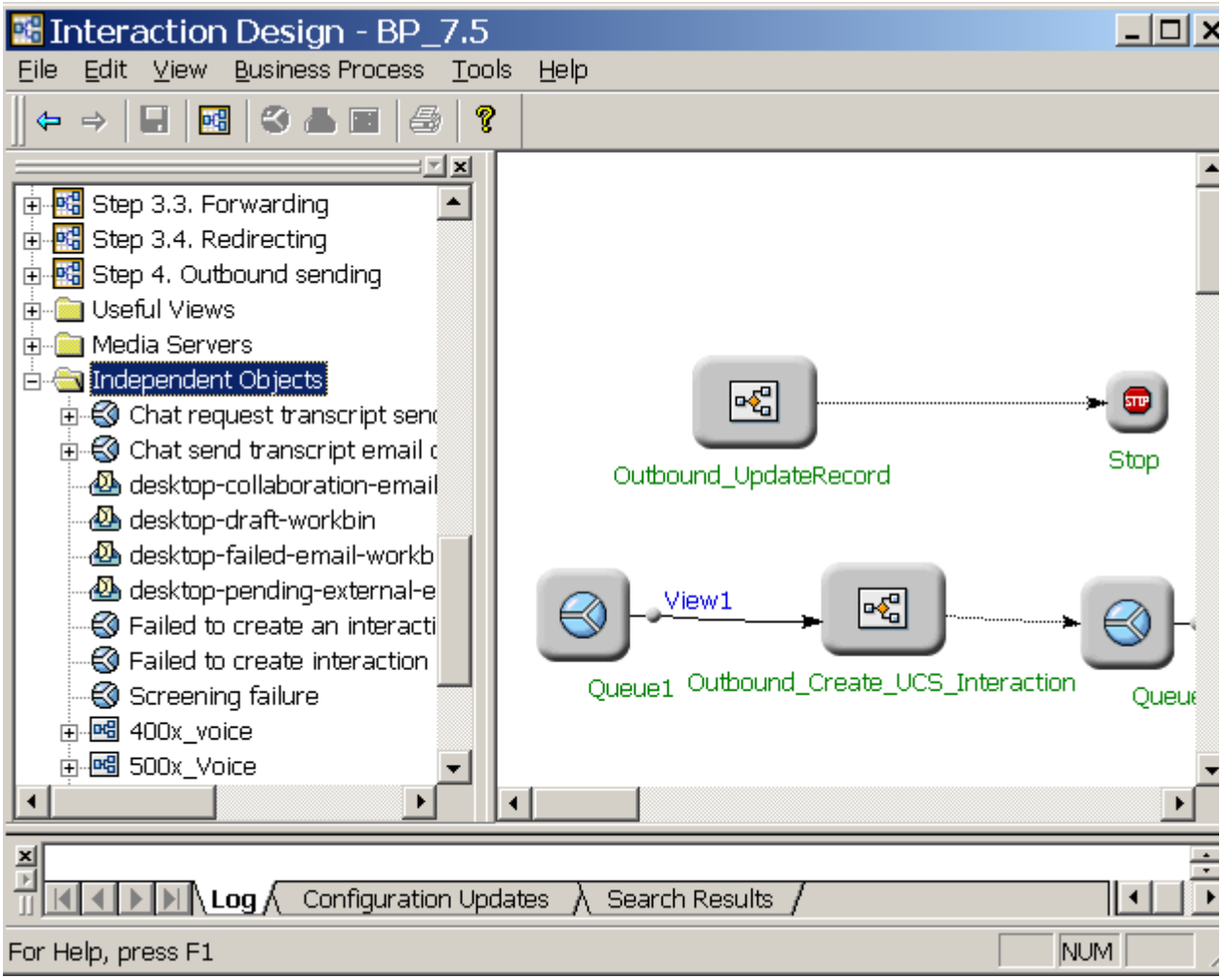

Figure 24: Independent Objects Folder

Any Interaction Design object that does not belong to a business process (including both voice and non-voice strategies created outside of the `Interaction Design` GUI) appears in this folder. You can select a strategy object that appears in this folder and drop it into the `Strategies` folder of a business process.

Procedure: Loading multimedia strategies

`Note:` For step-by-step instructions on loading multimedia strategies using the Strategy Activation Wizard, see the topic on activating strategies in the *Universal Routing 7.6 Interaction Routing Designer Help*. The information below summarizes the process.

Purpose: To activate routing strategies associated with the other Interaction Design objects used in a business process like queues and workbins. In the case of a multimedia interaction, there is no physical switch present as there is for a voice interaction. Instead, the switch, as well as the routing point configured on such a switch, is a virtual one. In this case, you activate (load) the strategy using the `Strategy Activation Wizard` in the `Interaction Design` window.

Note: Make sure the Proactive Routing strategy you want to activate appears in the `Interaction Design Workflow Viewer` before you begin loading it to the routing point. Unlike the strategies that use Multimedia objects, strategies that use Outbound objects will not automatically appear in `Interaction Design Workflow Viewer`. You will need to drag them from the browser area and drop them to the workflow viewer.

Start of procedure

1. Open the the `Strategy Activation Wizard` using one of these methods:
   - Right-click the `Strategy` object in the browser or workflow viewer and select `Activate Strategy` from the shortcut menu (see Figure 25).

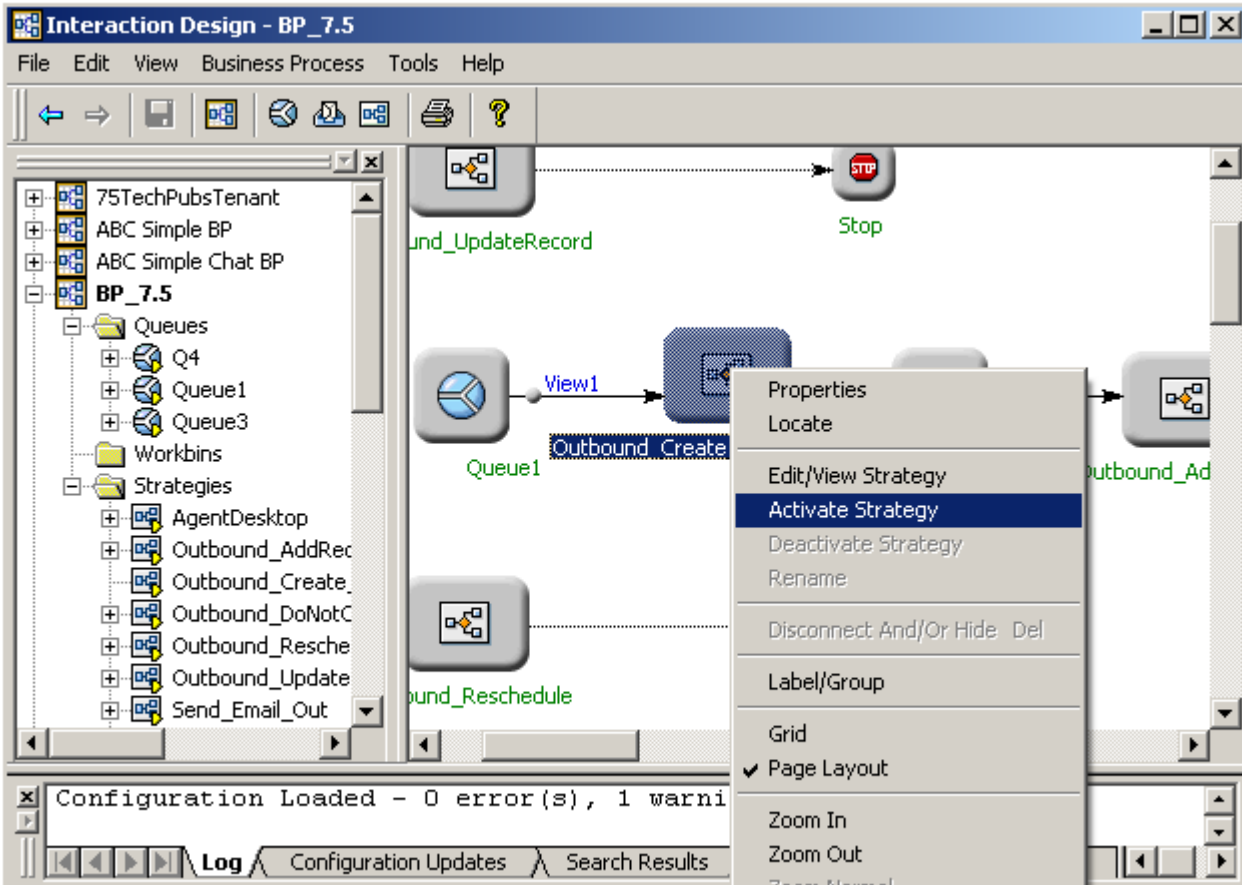

Figure 25: Interaction Design, Activating a Strategy

- For a currently open business process, highlight the name in the object browser and select `Activate Strategy` (ies) from the `Tools` menu. Using this method, you can activate multiple strategies at once.

With either method, the `Strategy Activation Wizard` opens.

- If a connection does not exist between the Switch and the Interaction Server in Configuration Manager, the Wizard displays a warning.
- If the connection does exist, the Wizard prompts you to select an Interaction Server as shown below (see Figure 26).

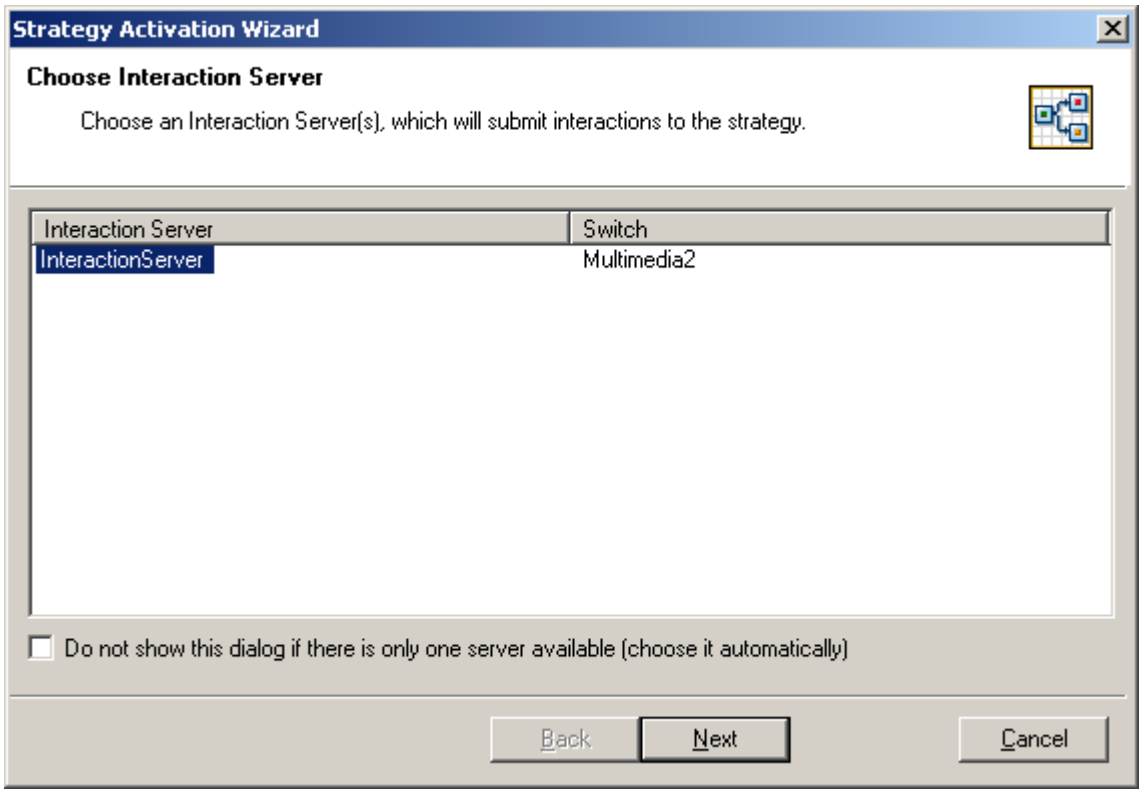

Figure 26: Strategy Activation Wizard for Multimedia Interactions

2. Select an Interaction Server that will submit interactions to the routing strategy and click `Next`.
   - If a connection does not exist between the Interaction Server and the Universal Routing Server in Configuration Manager, the Wizard displays a warning.
   - If the connection does exist, the Wizard prompts you to select a Universal Routing Server as shown below (see Figure 27).

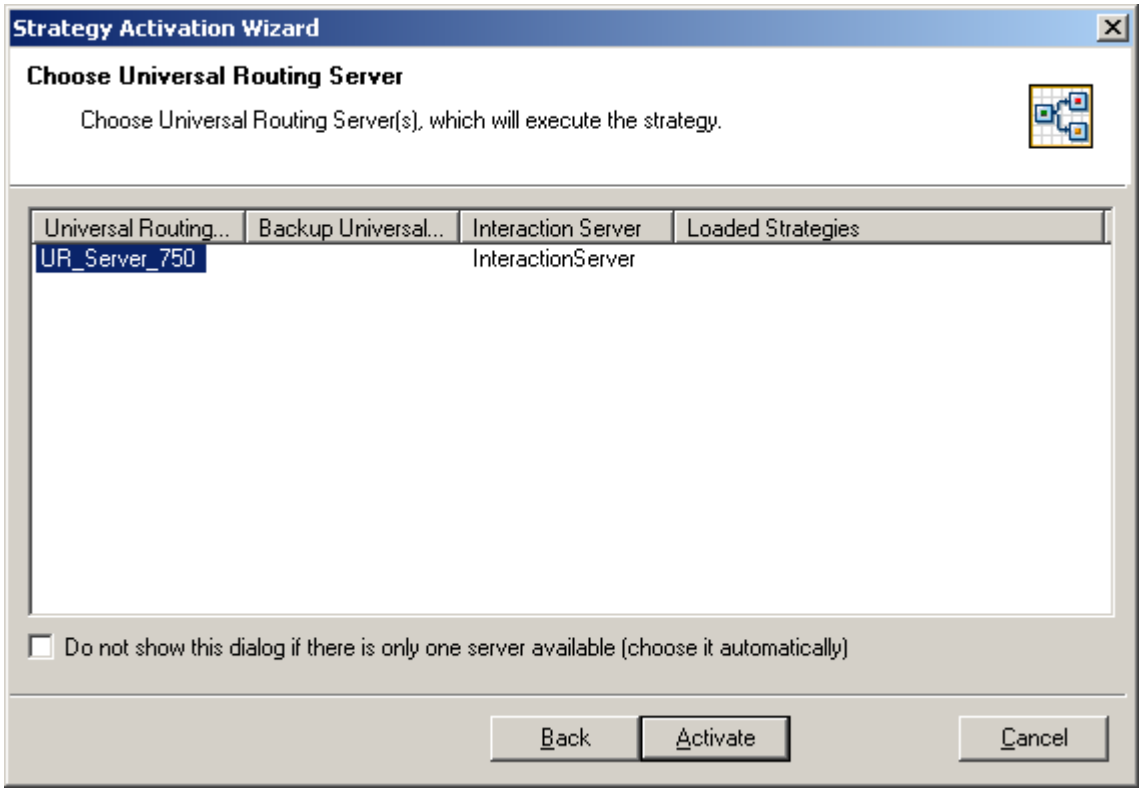

Figure 27: Strategy Activation Wizard, Select Universal Routing Server

3. Select a Universal Routing Server and click `Activate`. The Wizard indicates the strategy is marked for activation and the result of activation (see Figure 28).

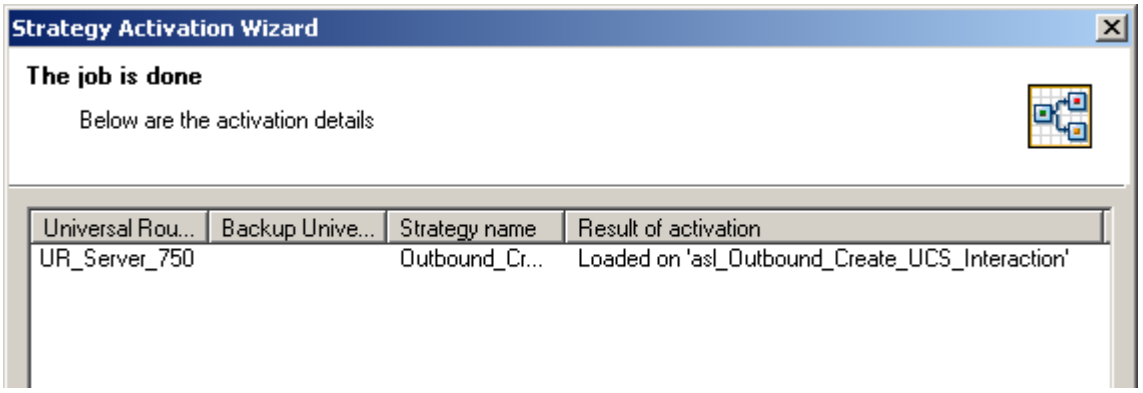

Figure 28: Strategy Activation Wizard, Strategy Activation Details

4. Click `Close`. Activated strategies are marked with a green arrow in the upper right corner in the workflow viewer and in the object browser (see Figure 25 on page 62). In IRD's `Loading View`, the multimedia strategy appears loaded to the virtual routing point automatically created during the strategy activation process (see Figure 29).

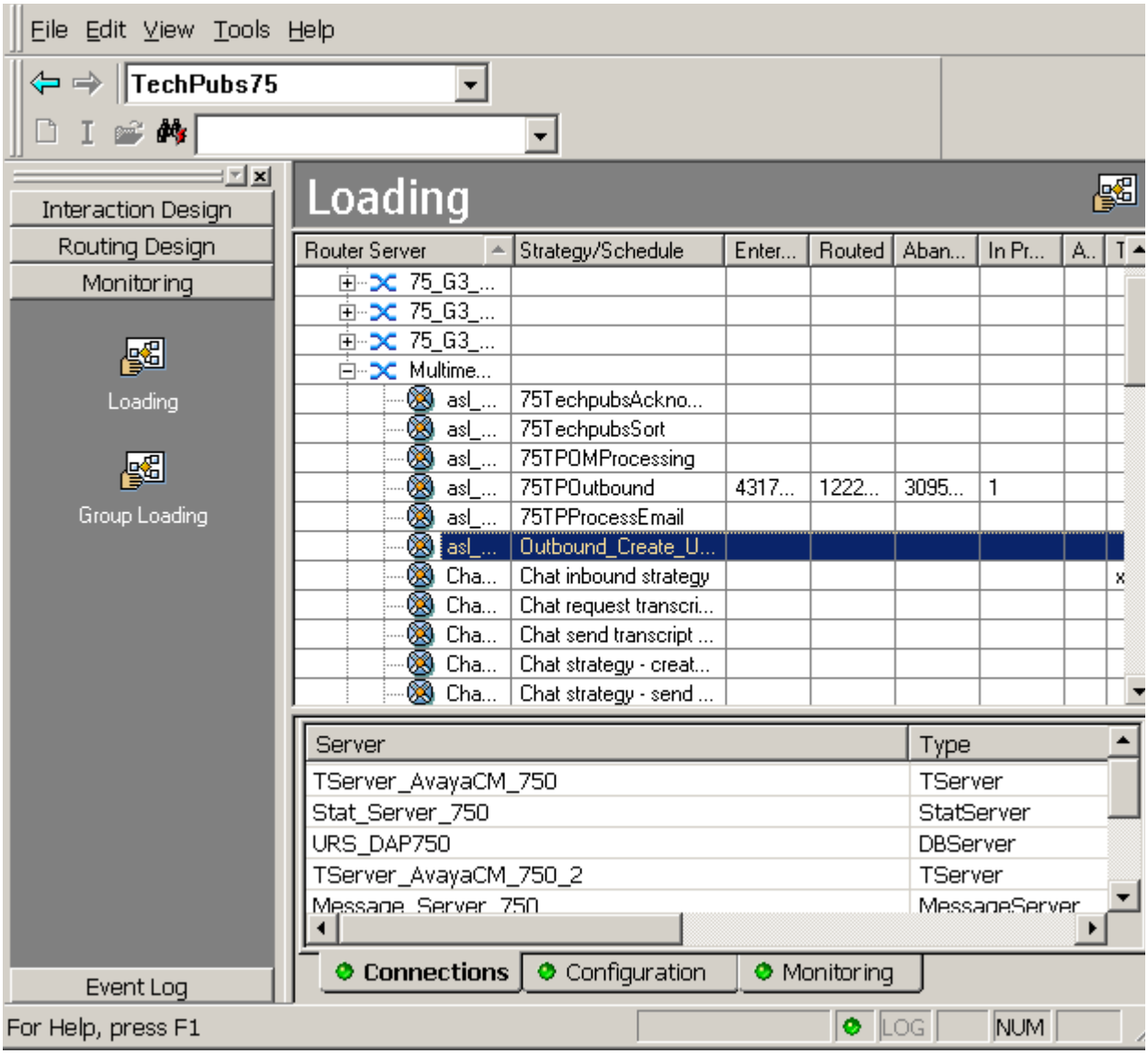

Figure 29: IRD Monitoring View, Strategy Loaded

End of procedure

Universal Routing Server options specific to Proactive Routing

In addition to the usual Universal Routing Server configuration, there are two options specific to Proactive Routing. This section describes the `environment` and `use_agent_capacity` options and how they are configured.

environment

Default value: none
Valid values: Comma-separated list of environment parameters of which URS needs to be aware. In 7.6, the only valid value is `outbound`.

The purpose of this option is to inform URS about various environment parameters in case there are some actions URS should undertake to guarantee successful functioning in that particular environment.

Set this option to `outbound` if you wish to notify URS that all `Persons` (agents)/`Places` in its configuration environment can potentially participate in some Outbound Campaign (not just members of some Campaign Group used in a strategy).

Use Case

Starting with 7.5, URS and Outbound Contact Server can cooperate for the purpose of sharing multi-skilled agent `Persons` and/or `Places`. A special statistic `CurrentAgentAssignment`, provides information about the activity that the Agent/Place is currently busy with (assigned to). Activities can be related to inbound interactions or Campaign Group activities, such as proactive routing. Use the `environment` option to ensure that a `Person`/`Place` busy with one of these activities does not get any calls associated with any other activities.

By default, URS opens the `CurrentAgentAssignment` statistic for agent `Persons`/`Places` from a Campaign Group specified as target in a strategy (Routing Selection object or Route Interaction object). Since URS does not know the current activity for all other agent `Persons`/`Places`, it is possible (if those multi-skilled agents participate in multiple activities) for URS to send calls associated with other activities.

When the `environment` option is set to `outbound`, URS opens the `CurrentAgentAssignment` for *all* agent `Persons` or `Places`. As a result, *all* agent `Person`/`Places` become protected from calls related to different activities, no matter how they are addressed in strategies.

use_agent_capacity

Default value: `TRUE`
Valid values: `TRUE`, `FALSE`

Starting with Universal Routing 7.0.1, URS is required to use agent capacity information supplied by Stat Server when routing non-voice interactions. For example, URS must use agent capacity information in a blended environment (such as when routing e-mail plus voice or e-mail plus chat) or when routing other media types (such as when routing only e-mail or only chat). URS can use agent capacity information provided by Stat Server to determine an agent's ability to accept a particular interaction at a particular time. When factoring in agent capacity information, URS selects from the pool of agents with the

required business skills and chooses the available agent(s) based on agent capacity information (instead of current agent state).

In order to use proactive routing, the `use_agent_capacity` option must remain set to `TRUE`. If you want more information on this option, see the chapter on options in the *Universal Routing 7.6 Reference Manual*.

Configuring Universal Routing Server options specific to Proactive Routing

Procedure: Creating the Universal Routing Server environment option

Purpose: To create the `environment` option, which is not part of the Universal Routing Server Application Template.

Start of procedure

1. Open Configuration Manager as described in Opening Configuration Manager, page 32.
2. Open the Universal Routing Server `Application` object. Figure 30 shows an example.

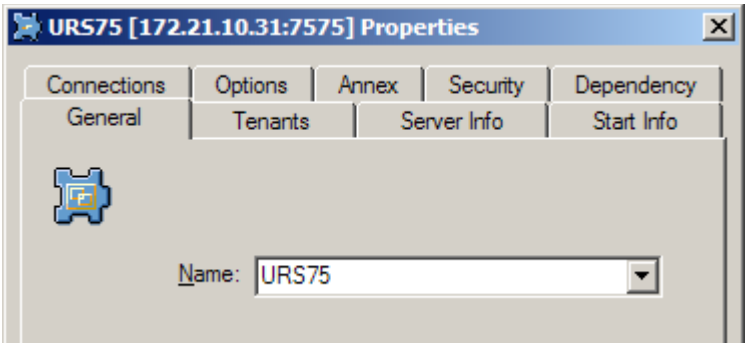

Figure 30: Universal Routing Server Application Object

3. Click the `Options` tab (see Figure 31).

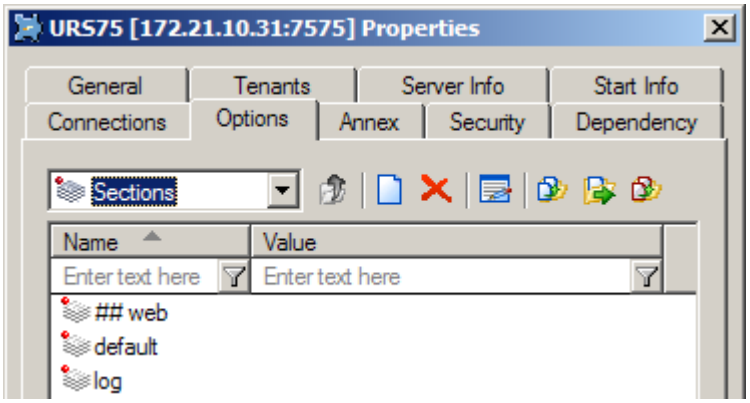

Figure 31: Options Tab in Universal Routing Server Application Object

4. Double-click the `default` section.
5. Click the button to create a new section/option (see Figure 32).

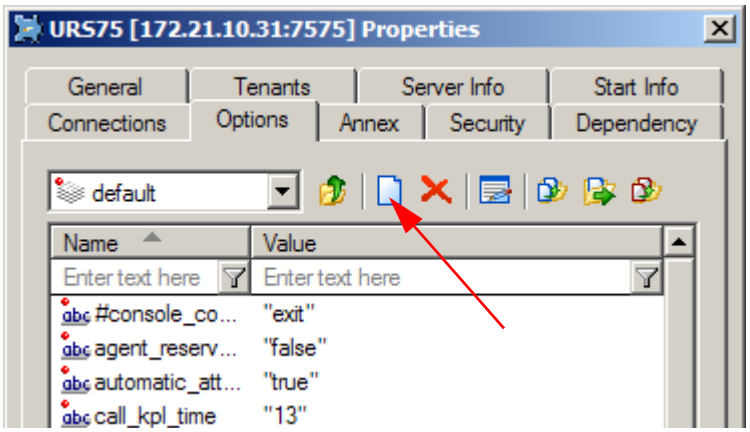

Figure 32: Button to Create a New Section/Option

6. In the resulting dialog box, view the option name and value (see Figure 33).

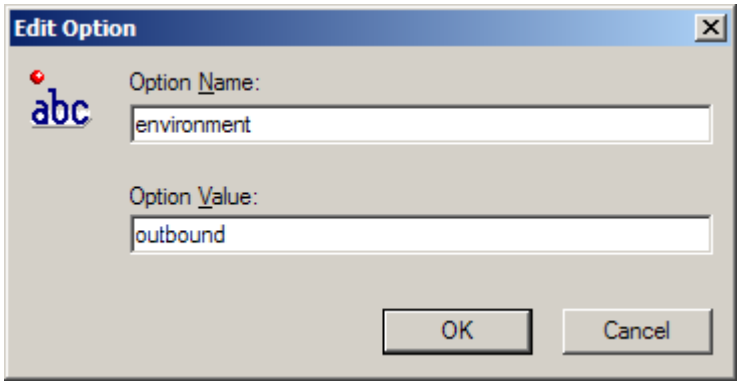

Figure 33: Edit Option Dialog Box

7. Click OK. The option appears in alphabetical order in the options list (see Figure 34).

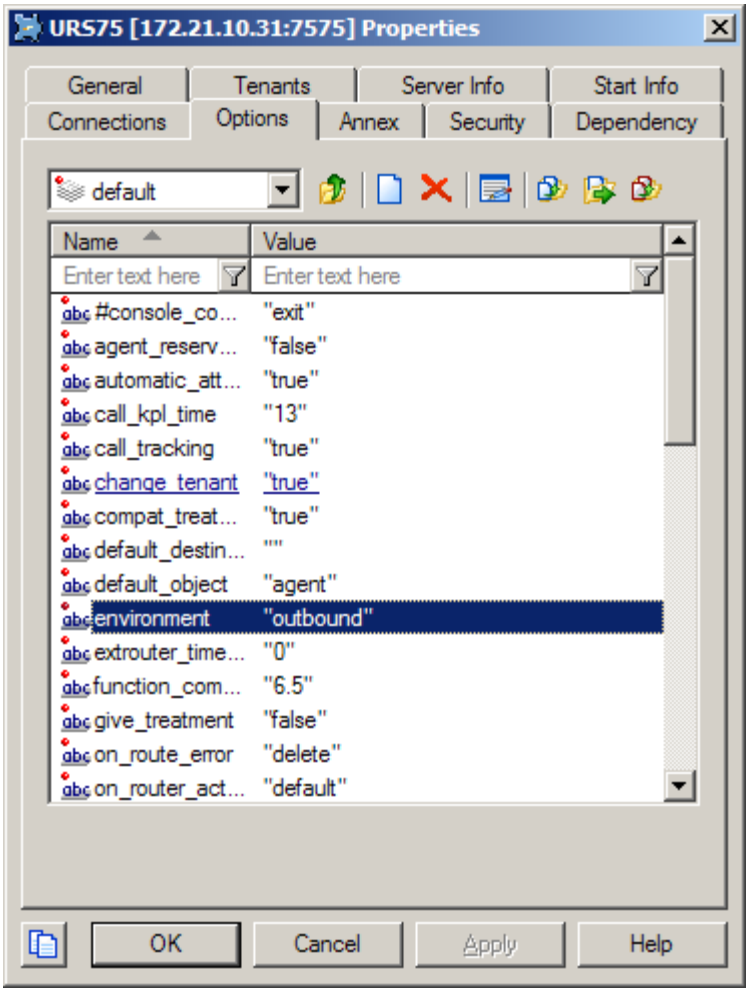

Figure 34: Outbound Contact Server Application Object, OCServer Section

8. Click OK. The option appears in alphabetical order in the options list.

End of procedure

Next Steps

- Configuring the Universal Routing Server use_agent_capacity option

Procedure:
Configuring the Universal Routing Server use_agent_capacity option

Purpose: To verify the `use_agent_capacity` option is set to `TRUE` as is required for Proactive Routing.

Start of procedure

1. Open Configuration Manager as described in Opening Configuration Manager, page 32.
2. Open the Universal Routing Server `Application` object.
3. Click the `Options` tab.
4. Locate the `use_agent_capacity` option in the list.
5. If necessary, double-click the option and change the value to `TRUE`. Click OK to apply your changes.

End of procedure

Next Steps

- Review the next section for more information on Agent Capacity Rules.

Routing Based on Agent Capacity Rules

Resource Capacity Planning (RCP) represents Genesys's latest methodology for distributing contact center interactions.

Capacity Rule Definition

A major element of RCP is a capacity rule, which defines a resource's ability to handle multiple interactions. For RCP methodology, the term resource is synonymous with a `Person` object that is configured as an Agent and defined in Configuration Manager.

A capacity rule is a set of logical expressions that specify the boundaries of a resource's ability to handle one interaction or more than one simultaneous interaction of differing media types.

URS can use agent capacity information provided by Stat Server to determine an agent's ability to accept a particular interaction at a particular time. URS is required to use agent capacity information when routing non-voice interactions. For example, URS must use agent capacity information in a blended environment (such as when routing e-mail plus voice or e-mail plus

chat) or when routing other media types (such as when routing only `outbound preview` or only `e-mail` media types).

Agent Capacity Option

The URS Application template sets the `use_agent_capacity` option to `TRUE`. This is because Genesys assumes that many new customers installing Universal Routing 7.6 are or will be routing both voice and non-voice interactions and will want to use agent capacity rules. In order to use proactive routing, the `use_agent_capacity` option must remain set to `TRUE`. If you want more information on this option, see the section "Universal Routing Server options specific to Proactive Routing" earlier in this chapter, or the chapter on options in the *Universal Routing 7.6 Reference Manual*.

Hints on Configuring Proactive Strategies

Note: For information on enabling proactive interaction functionality on the Agent Desktop (also known as `Push Preview` mode), see the chapter on Communication Protocols, Proactive Interaction Support section, in the *Outbound Contact 7.6 Reference Manual*.

Keep the following in mind when configuring proactive routing strategies:

- You can configure routing strategies to distinguish proactive interactions (outbound records) from inbound interactions.

  Records generated in `Push Preview` dialing mode are submitted with a `Media Type` of `outbound preview`. Outbound Contact Server (OCS) delivers them according to Agent Capacity rules and current agent activity. Agents may process them in parallel with any other kind of interactions.

  To be able to receive records generated in `Push Preview` mode, the agent must be logged into an Interaction Server Place and into Media Channel `outbound preview`. To access an interaction's `Media Type`, use the `GetMediaTypeName[mediaId]` and `GetMediaType[]` functions.

  Example:

  ```
  If (GetMediaTypeName[GetMediaType[]]='outbound preview') then · else
  ·
  ```

- When submitting interactions generated in `Push Preview` mode to Interaction Server, OCS specifies the `Media Type` of the interaction that should be created for contacting the customer (see Table 4).

Table 4: OCS Media Type Specification

Key	Type	Value
GSW_CONTACT_MEDIA_TYPE	String	Media type corresponding to Media Type Business Attribute value. Use standard user data access functions such as UData[key] to access user data including GSW_CONTACT_MEDIA_TYPE.

- Universal Routing 7.6 is not hard-coded to handle rejected interactions. Similar to Ring-No-Answer situations, you must configure routing strategies to handle rejected interactions such as:
  - Restoring rejected interaction positions in waiting queues by using age of interaction.
  - Marking rejected interactions with attached data then analyzing the attached data.

Delivering Proactive Interactions to Agent Desktop

In order to deliver proactive routing interactions to Agent Desktop in `Push Preview` mode, you must use the Route Interaction strategy-building object (the same object you use to deliver e-mail interactions to the Desktop). Figure 35 shows an example business process fragment.

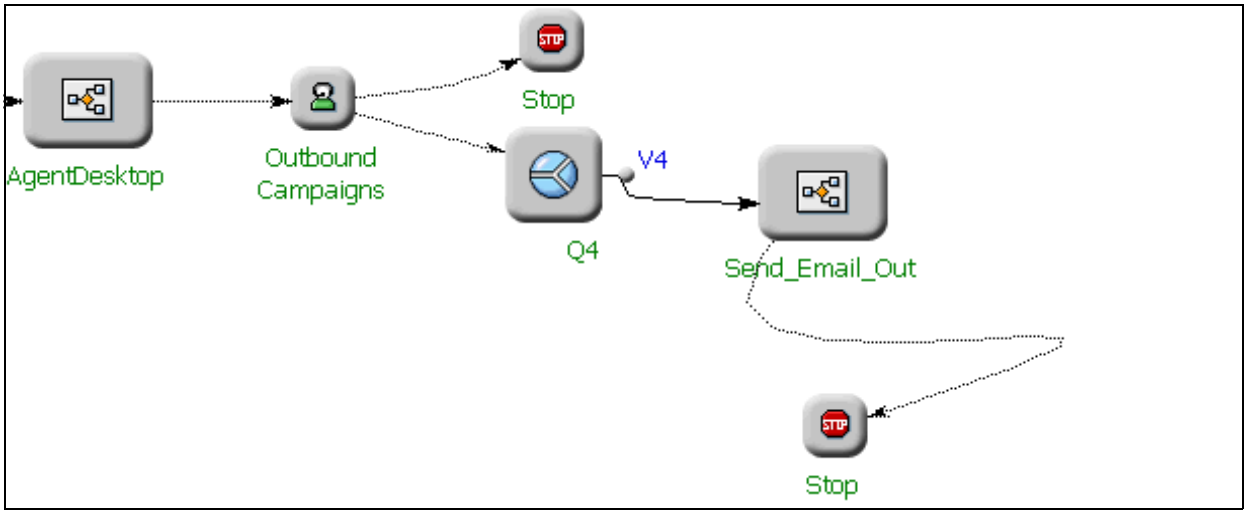

Figure 35: Delivering Proactive Interactions to Agent Desktop

The `Agent Desktop` strategy in Figure 35 contains a Route Interaction object (see Figure 36).

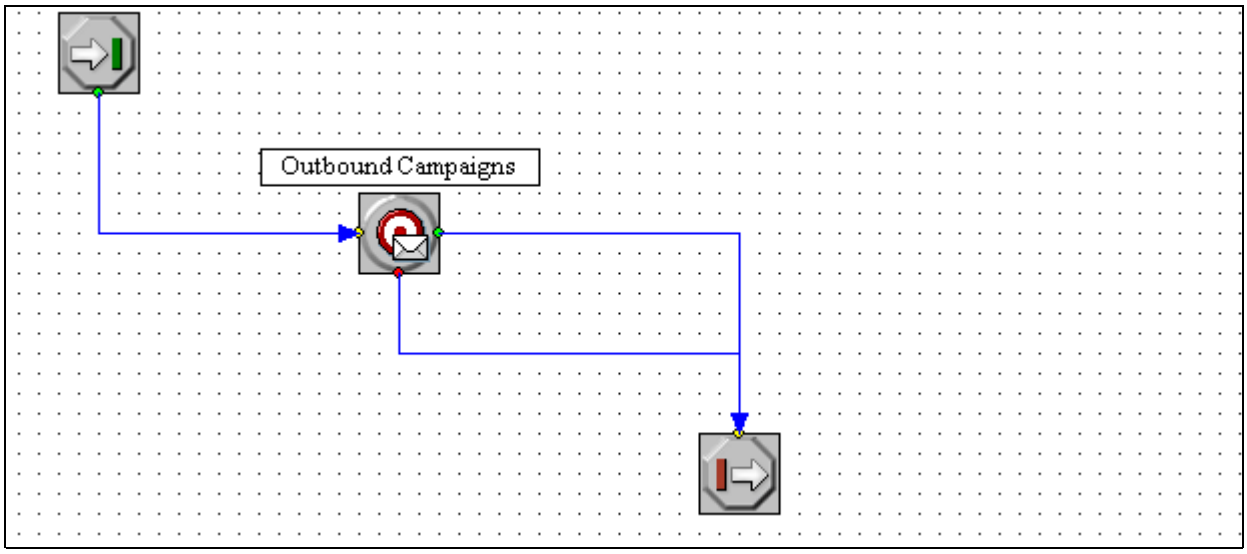

Figure 36: Strategy Containing Route Interaction Object

As shown in Figure 35, the Route Interaction object routes to an `Agent Group` named `Outbound Campaigns`. As also shown in Figure 35, this `Agent Group` writes to a queue (`Q4`) for outbound sending of e-mails interactions (handled by the `Send_Email_Out` strategy). Figure 37 shows both tabs in the Route Interaction Properties dialog box.

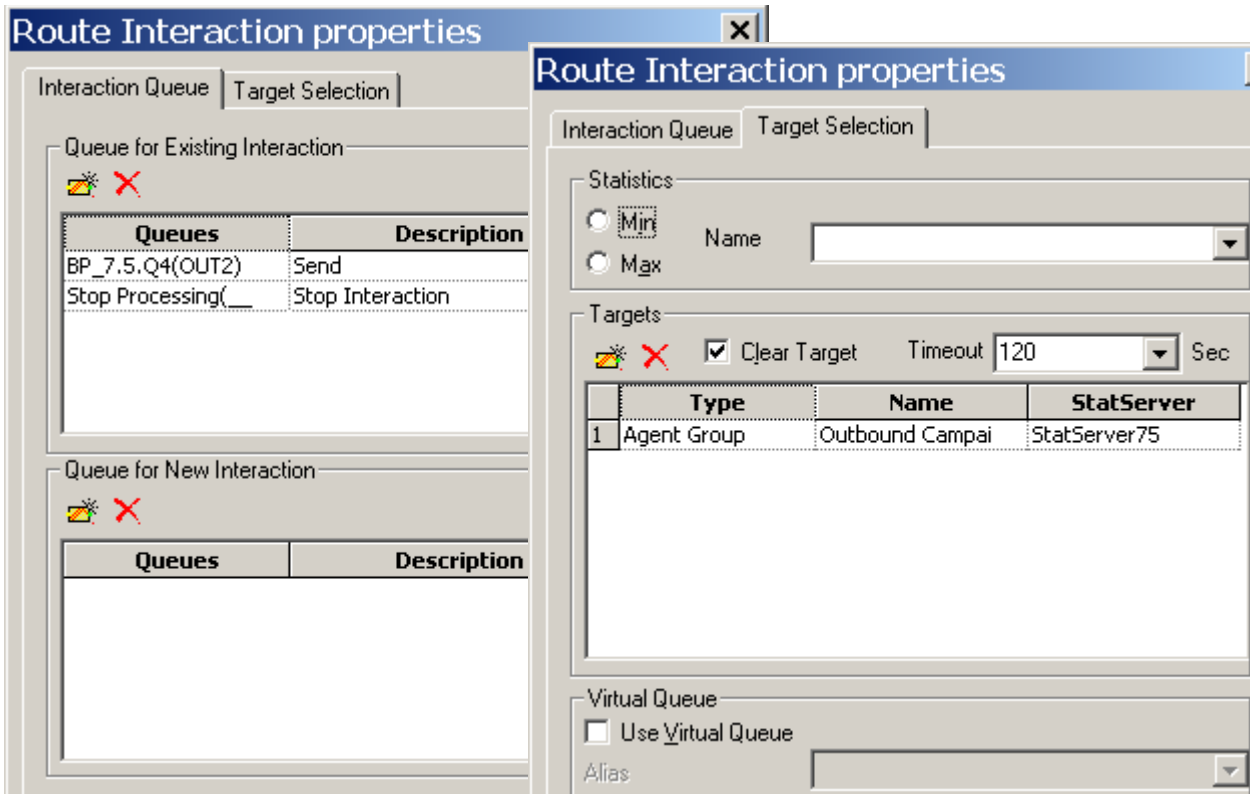

Figure 37: Route Interaction Object

Chapter

5 Configuring Agent Desktop and Login Dialog Box

This chapter describes how agent capacity rules affect the login dialog box used by Genesys Agent Desktop.

The information in this chapter is divided among the following topics:

Installing Agent Desktop

The instructions in this chapter assume that the Genesys Multimedia product is already installed and running as described in the *Genesys Desktop 7.6 Deployment Guide*.

Agent Capacity Rules

The Agent Desktop login dialog box uses agent capacity rules to define the media types that the agent can receive so you must specify that the agent can receive the `outbound preview` media type associated with proactive routing.

> Note: If you need a review of agent capacity rules, see "Routing Based on Agent Capacity Rules" on page 70.

The instructions in this chapter assume that the agent capacity rules are already configured as described in the *Genesys 7.1 Resource Capacity Planning Guide*. It also assumes you have already included `outbound preview` as a media type in one or more capacity rules.

Example Agent Capacity Rule

Figure 38 shows an example agent capacity rule (`Script` object) that includes `outboundpreview`.

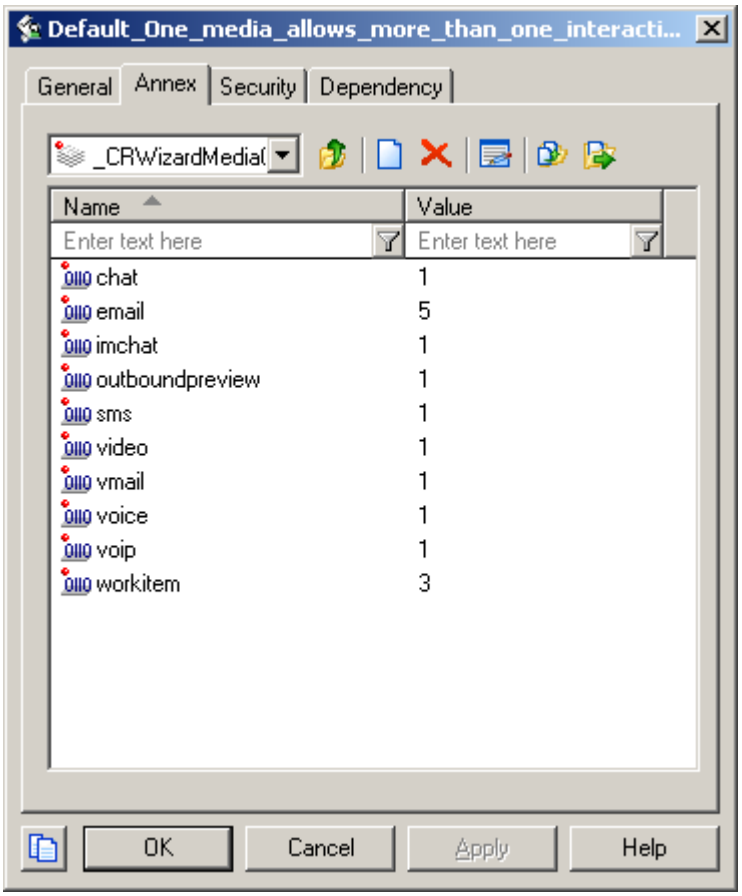

Figure 38: Example Agent Capacity Rule

Procedure: Assigning capacity rules

Purpose: You can assign agent capacity rules at the `Tenant` (default), `Person` (agent), and `Place` levels. This procedure outlines how to assign capacity rules at the agent level.

Start of procedure

1. Open Configuration Manager as described in Opening Configuration Manager, page 32.
2. Open the `Persons` folder and any other folder in order to select the agent to have the capacity rule assigned.

3. Click the `Agent Info` tab.
4. Opposite `Capacity Rule`, click the browse button. Configuration Manager looks in the `Scripts` folder.
5. Find/select the capacity rule.

Figure 39 shows the above capacity rule in Figure 38 on page 76 assigned to an agent in the `Person Properties` dialog box.

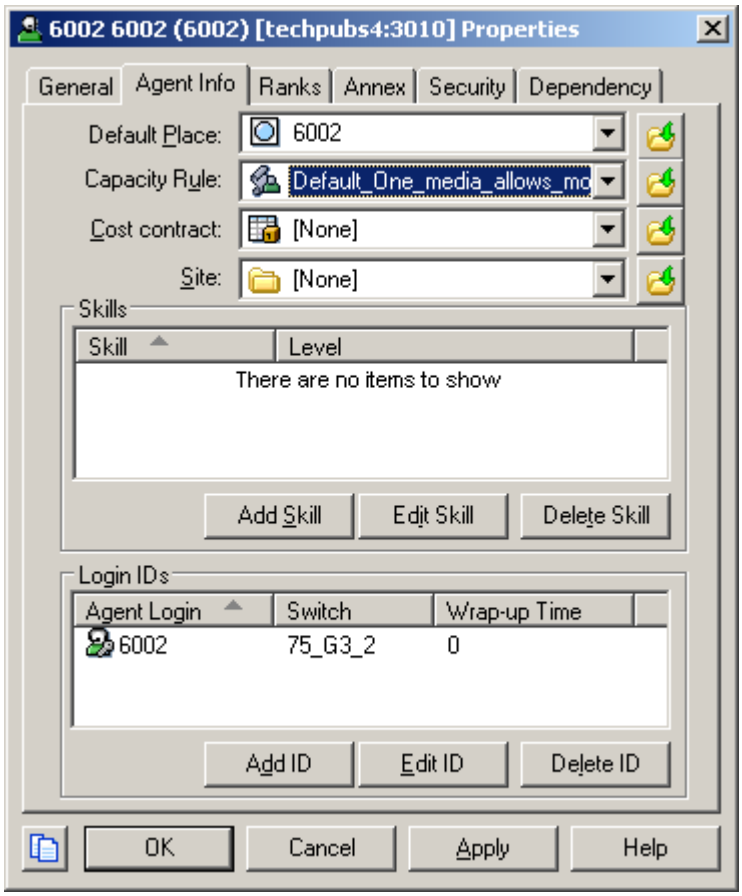

Figure 39: Person Properties Dialog Box, Capacity Rule in Agent Info Tab

If the capacity rule shown in Figure 38 was associated with the agent logging in, then `outbound preview` is listed in the Agent Desktop login dialog box (see Figure 40).

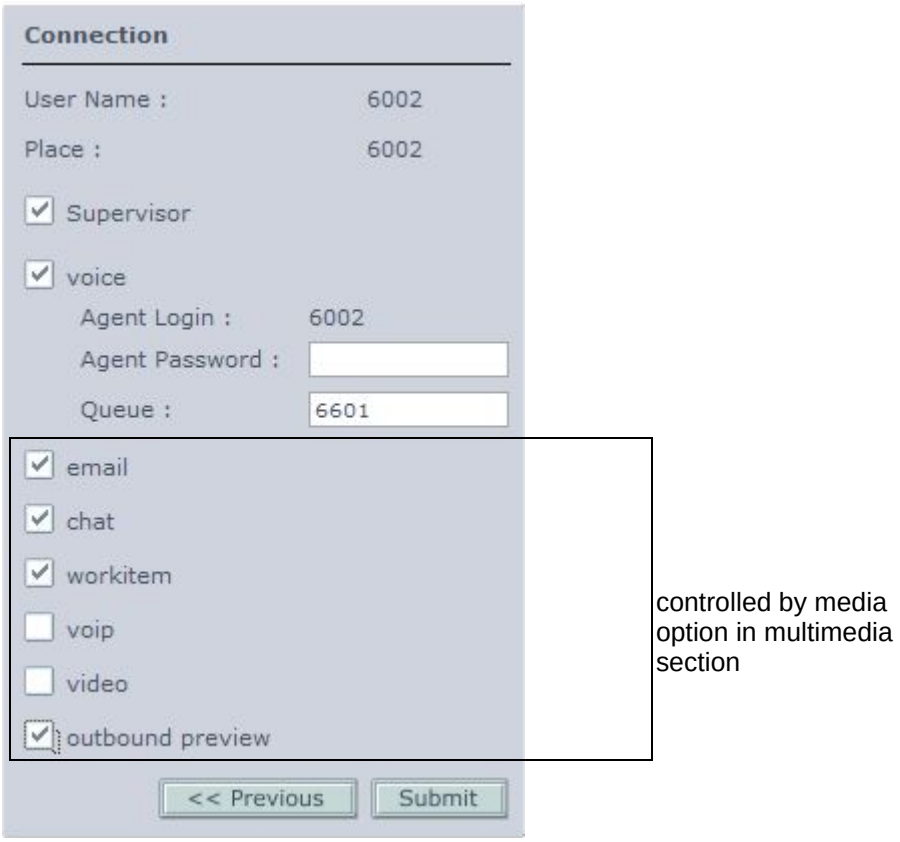

Figure 40: Dialog Box for Logging In

In order to receive outbound preview interactions, the agent must check `outbound preview` along with any other desired other media types.

End of procedure

Agent Desktop options specific to Proactive Routing

In addition to the usual Agent Desktop configuration, there are two options specific to Proactive Routing. This section describes the `media` and `preview-park-queue` options and how they are configured.

media

Default Value: `email, chat`

Valid Values: <Any valid media name>

This option is a comma-separated list of media names. This option defines the list of media that is proposed to the agent in the login window.

preview-park-queue

Default Value: `__STOP__`
Valid Values: Any valid Interaction Queue name.

This option enables an agent to transfer ownership of a proactive interaction to the transfer target when a proactive interaction voice call is transferred. This enables the appropriate postprocessing to be applied after target of the transfer releases.

Procedure: Specifying login media types

Purpose: Figure 40 does not list all the media types shown in the capacity rule in Figure 39 on page 77. This is because you can specify the media types shown in the `Connect` dialog box via the `media` option in the Agent Desktop `Application` object. This procedure outlines how to do so.

Start of procedure

1. Open Configuration Manager as described in Opening Configuration Manager, page 32.
2. Open the `Applications` folder.
3. Open the Agent Desktop `Application` object (see Figure 41).

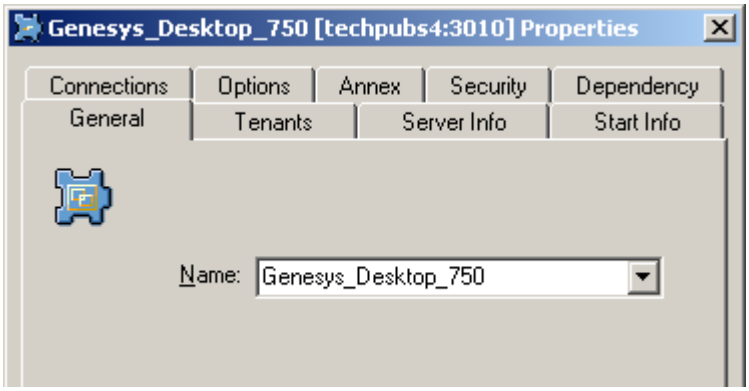

Figure 41: Agent Desktop Application Object

4. Click the `Options` tab (see Figure 42).

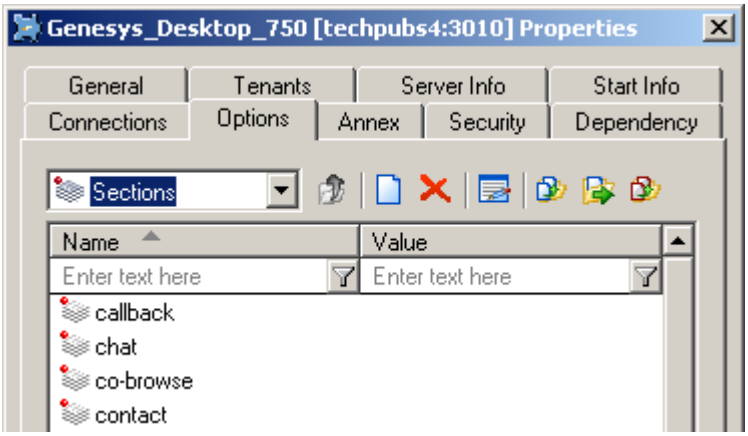

Figure 42: Agent Desktop Application Object, Options Tab

5. Select the `multimedia` section and click the icon to edit the section/option (see Figure 43).

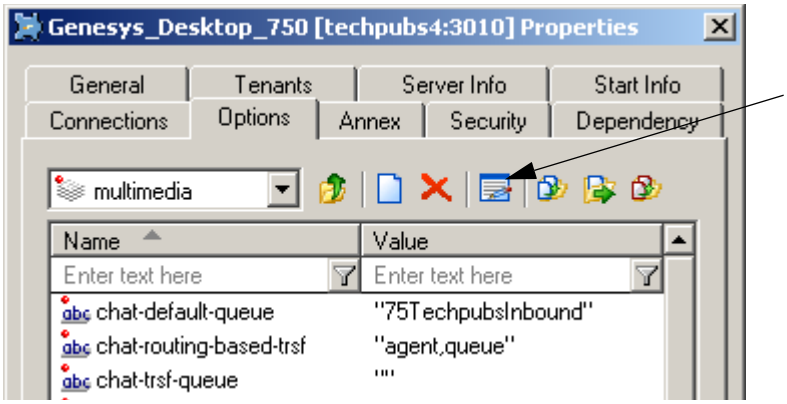

Figure 43: Icon to Edit Section/Option

6. In the resulting dialog box where you specify the media types to be shown in the login dialog box, add the `outboundpreview` media type. Figure 44 shows an example completed dialog box.

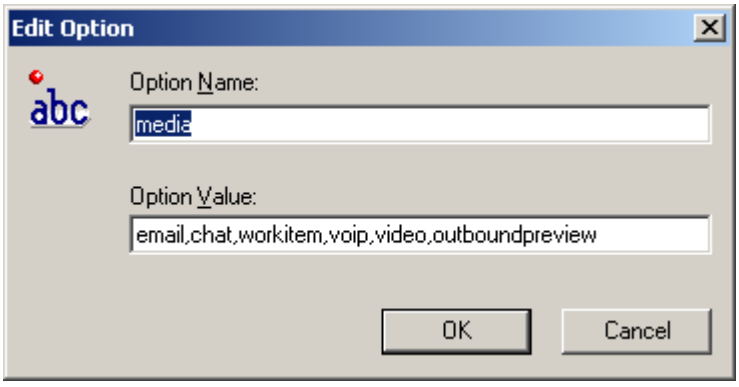

Figure 44: Edit Option Dialog Box

7. Click `OK`. The media option includes `outboundpreview` (see Figure 45).

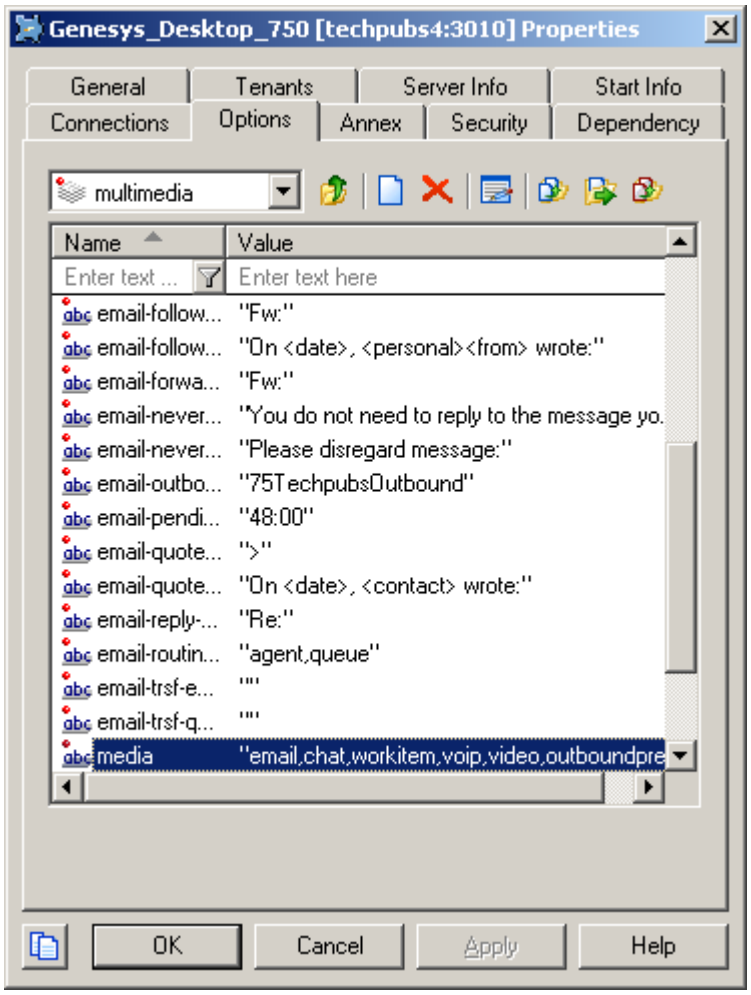

Figure 45: Media Option After Adding Outboundpreview

End of procedure

Procedure:
Setting the preview-park-queue option

Purpose: To ensure proper handling of workflow post-processing features, you may also wish to set the `preview-park-queue` option in the `outbound` section of the Agent Desktop `Application` object.

Start of procedure

1. Open Configuration Manager as described in Opening Configuration Manager, page 32.
2. Open the `Applications` folder.
3. Open the Agent Desktop `Application` object (see Figure 41).

4. Click the `Options` tab (see Figure 42).
5. Select the `outbound` section and click the icon to edit the section/option (see Figure 43).
6. Set the `preview-park-queue` option to `__STOP__` (the default value), or any valid Interaction Queue name.

Note: For more information on the `preview-park-queue` option, see the section on handling Outbound and Callback interactions in the *Agent Desktop 7.6 Deployment Guide*.

---

7. Click `OK`.

End of procedure

Chapter

6 Using Proactive Routing

The information in this chapter is divided among the following topics:

Running a Proactive Campaign

After reviewing the other steps in the Task Flow for configuring and using a Proactive Routing solution, page 28, continue with the steps in this chapter for running a proactive routing Campaign.

Procedure: Verifying Push Preview mode

Purpose: Before running the Campaign, certain settings must be verified in Configuration Manager.

Start of procedure

1. Open Configuration Manager as described in Opening Configuration Manager, page 32.
2. In the `Environment` folder for the applicable `Tenant`, open the Outbound Server `Application` object.
3. In the `Resources` folder, open the `Campaigns` folder and select the applicable `Campaign Group` object and click the `Advanced` tab.
4. In the `Dialing Mode` field of the `Campaign Group` object, check that `Push Preview` is selected.

End of procedure

Procedure:
Logging into Outbound Contact Manager

Purpose: Proactive routing Campaigns are run from Outbound Contact Manager (OCM). This procedure outlines how to login to OCM.

Start of procedure

1. From the `Start` menu on your PC, the default path is `Start > Genesys Solutions > Outbound Contact > Outbound Contact Manager > Start Outbound Contact Manager`.
2. Complete the login dialog and click `OK` to open OCM. Figure 46 shows an example OCM when the `Dialing Mode` is set to `Push Preview` (see Figure 9 on page 39).

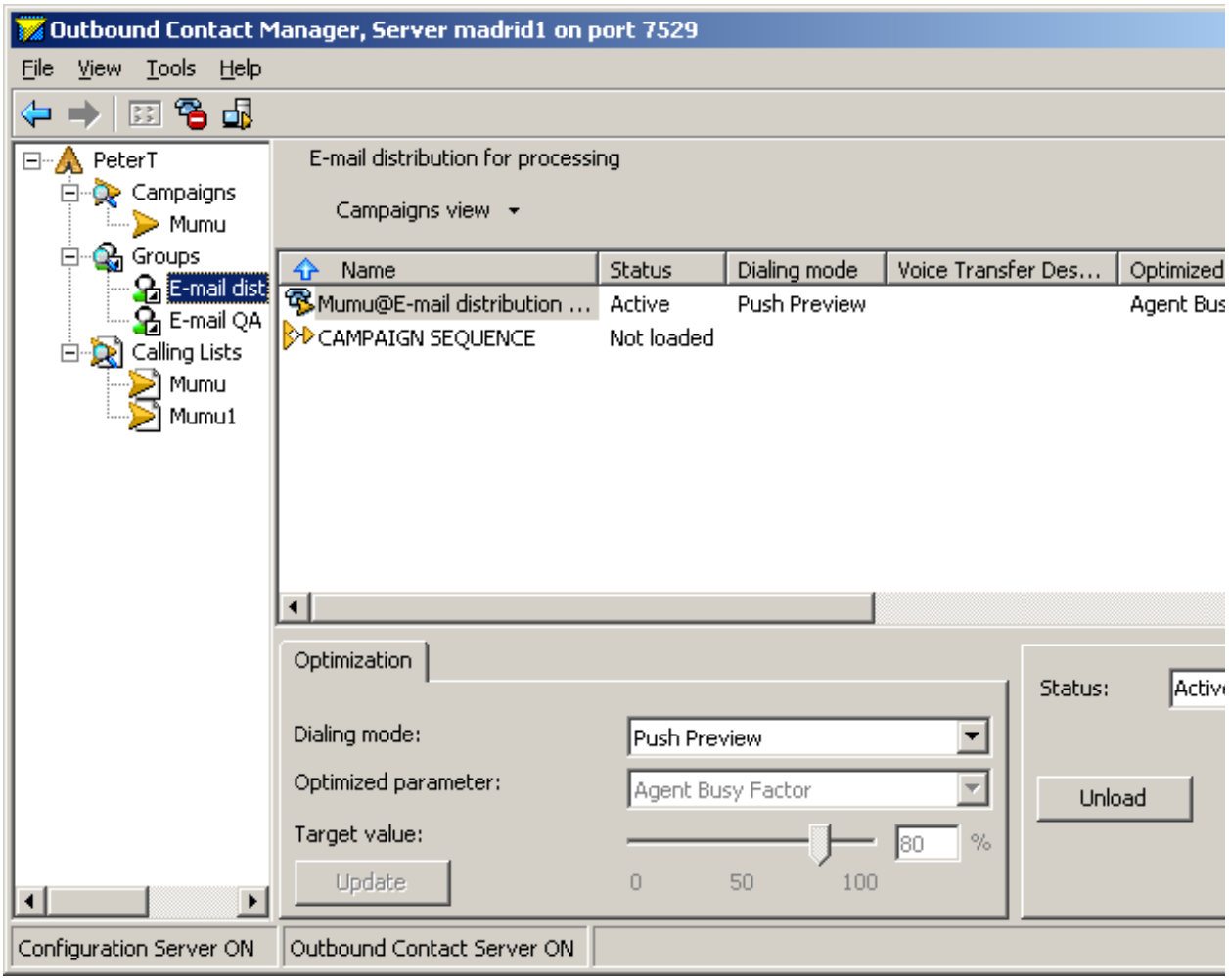

Figure 46: Outbound Contact Manager, Push Preview Mode

End of procedure

Procedure:
Starting a campaign

Purpose: This procedure outlines how a Supervisor would start a Campaign in OCM.

Start of procedure

1. Open the `Campaigns` directory and select a Campaign from the list. Verify that the `Groups` view displays.
   - The `Status` field displays `Not Loaded`.
   - The `Load` button is available.
   - The `Start` button is unavailable.
2. Click `Load` or select `Load` from the `Tools` menu.
   - The `Status` field changes to `Active`.
   - The `Load` button changes to `Unload`.
   - The `Start` button becomes available.
3. Click `Start`.
   - The `Status` field changes to `Running`.
   - The `Unload` button becomes unavailable.
   - The `Start` button changes to `Stop`. After starting, stopping is the only option available for this Campaign.

Note: For more detailed information, consult the *Outbound Contact 7.6 Outbound Contact Manager Help*.

End of procedure

Handling Preview Interactions

Before actually contacting the customer, an agent working on an outbound Campaign (for example: collections, telemarketing, or fund raising) is able to both receive interactions in Push Preview mode and request preview records. To work on the Campaign, the agent must first log in using the dialog box shown in Figure 40 on page 78.

Campaign Status Notification for Agents

Outbound Contact Server sends Campaign Status Notifications to Agent Desktops through T-Server. Since the notifications are sent through T-Server, only agents that are logged into voice media will receive them. When an

outbound Campaign is loaded and started in Push Preview mode, voice media agents that has associated with the corresponding Campaign Group will receive campaign status change notifications from Outbound Contact Server provided that all of the following are true:

- the agent is logged into voice media
- the agent is logged into outbound preview media
- both voice and outbound preview media types are listed in the capacity rules on the Agent Info tab of the properties of the agent's Person object in Configuration Manager.

There are no campaign status notifications sent to agents through Interaction Server. Agents who are only logged into outbound preview media and run pure multimedia campaigns do not receive notifications when an outbound Campaign is loaded and started in Push Preview mode.

Note: Outbound Contact Server only assigns agents to specific outbound campaigns when the campaigns are running in one of the auto-dial modes (Predictive or Progressive). Agents who are logged into Voice media and participating in Push Preview campaigns will instead be considered by OCS to be assigned to inbound activity. These agents will receive corresponding Agent Assignment notifications when campaigns are loaded, or when logging into an already active campaign.

Working on Push Preview Mode Calls

If the Campaign to which the agent is assigned is running in Push Preview mode, then the first available interaction is routed to the agent's desktop. A yellow Outbound Campaign icon (shown below) flashes in the upper left corner of the screen (see Figure 47).

Figure 47: Icon for Outbound Preview Interaction

The Desktop displays an Outbound preview interaction form while the interaction continues to ring and its icon continues to flash. The agent then does one of the following:

- Clicks Accept to take ownership of the interaction. (If the agent does not click Accept within a configurable time period, the interaction is automatically rejected and returned to the top of the interaction queue.)
- Clicks Reject to send the interaction back to the top of the queue.

If the agent clicks the Accept button, the agent has then taken ownership of the interaction. The icon for the Outbound preview interaction stops flashing.

Desktop Interface for Voice Preview Interaction

Figure 48 shows Agent Desktop for a voice preview interaction after clicking Accept.

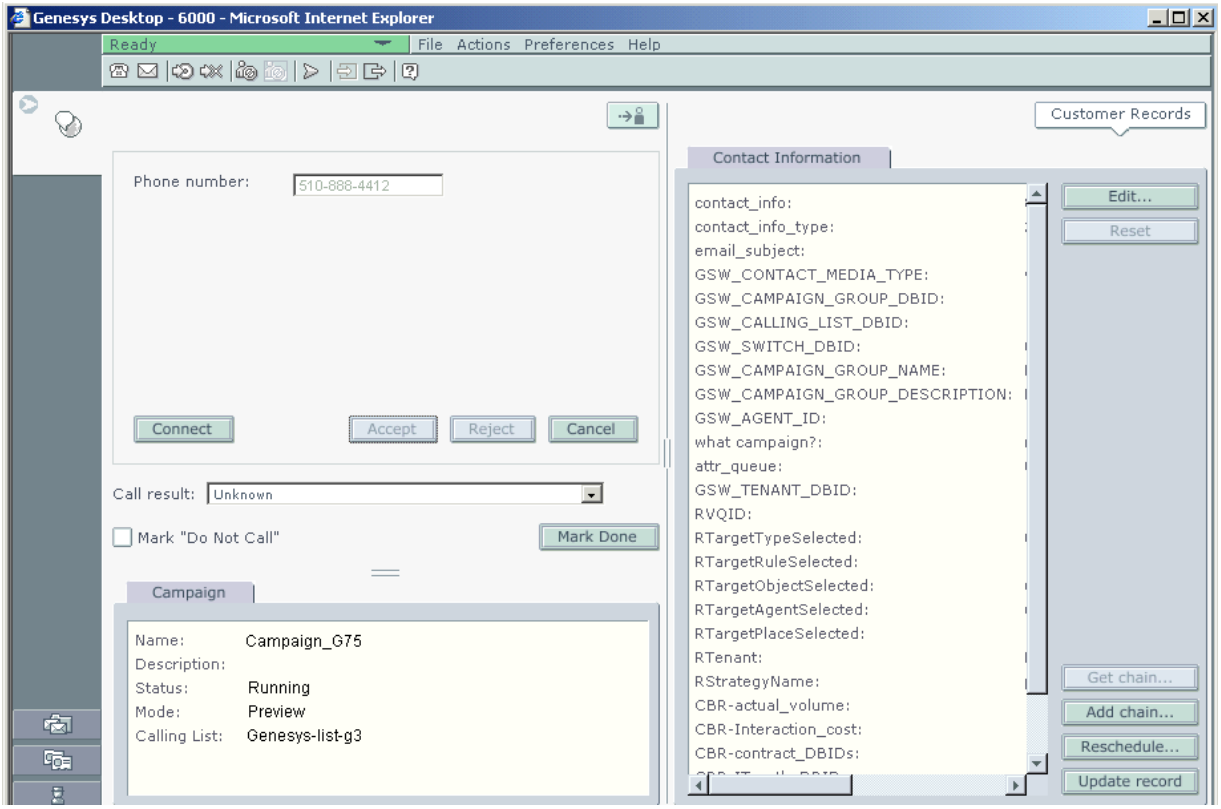

Figure 48: Agent Desktop, Preview Interaction, Voice

> Note: Genesys Agent Desktop is a customizable product. Your company's Agent Desktop may appear different than the examples shown.

The Contact Information tab contains editable fields from the interaction User Data.

After clicking Accept, the agent then does one or more of the following:

1. Clicks the Connect button to dial the call (see Figure 49).

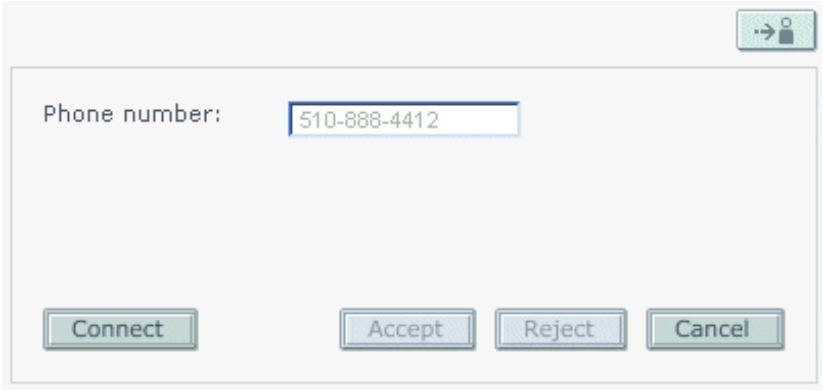

Figure 49: Connect Button

2. Selects or enters the contact phone number to make the call, and then clicks `Connect`. Before clicking the `Connect` button, the agent may need to edit the number by adding a prefix. To select another number, the agent clicks `Get Chain` (if available).
3. Clicks `Cancel` to send the interaction back to the queue and remove ownership of the interaction.
4. Clicks `Edit` to make changes to the Campaign information for this contact.
5. Clicks `Add chain` to add additional phone numbers that are associated with the contact.
6. Clicks `Reschedule` to set a different time for this contact to be called.
7. Clicks `Update record` to save changes to the information for this contact.

Note: When processing Campaign List records, items 5 through 8 can be handled without agent intervention using the Outbound strategy-building objects discussed in "Strategy Samples" on page 93.

Once the agent clicks the `Accept` button shown in Figure 48, he can then click `Connect` to create the voice interaction. Figure 50 shows the Genesys Agent Desktop for a voice interaction while talking to a customer.

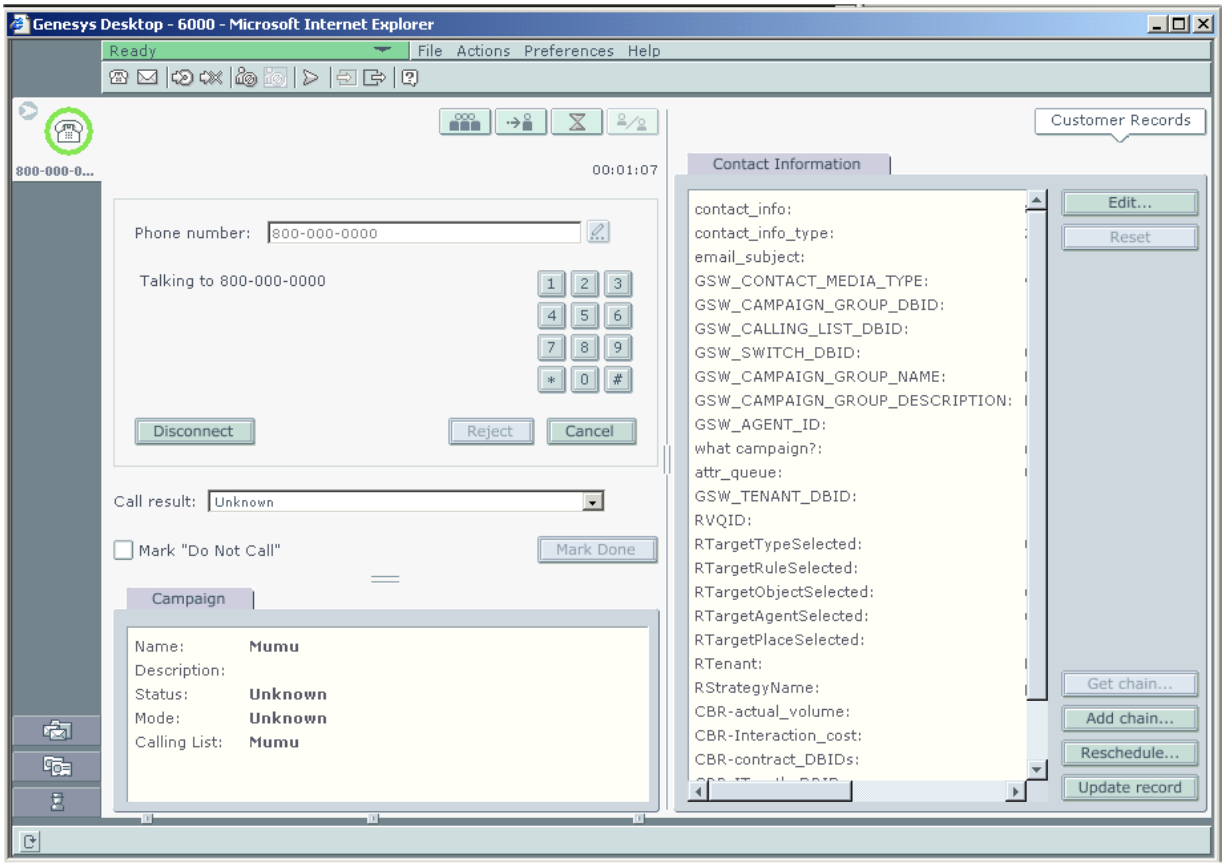

Figure 50: Agent Desktop, Voice Interaction After Outbound Preview

Desktop Interface for E-mail Preview Interaction

In addition to accepting preview interactions for voice contact with customers, a Proactive Routing solution allows agents to accept non-voice preview interactions, such as preview interactions prior to contacting customers via e-mail.

Figure 51 shows the Genesys Agent Desktop after clicking `Accept` for an Outbound preview interaction with an e-mail address as the customer contact information.

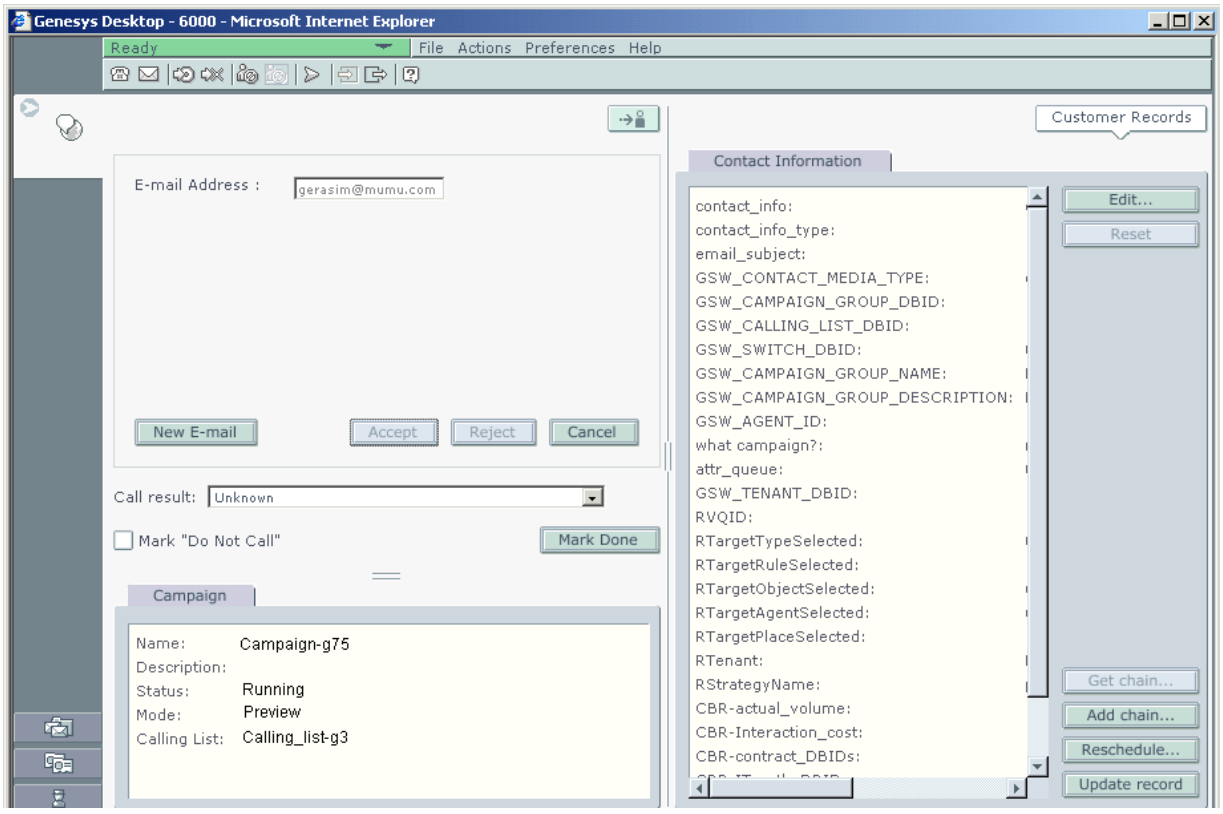

Figure 51: Agent Desktop, Preview Interaction, E-mail

Once the agent clicks the `Accept` button shown in Figure 51, he can then click `New E-mail` (see Figure 51) to create an interaction. Figure 52 shows the interface for creating a new interaction of the `e-mail` media type.

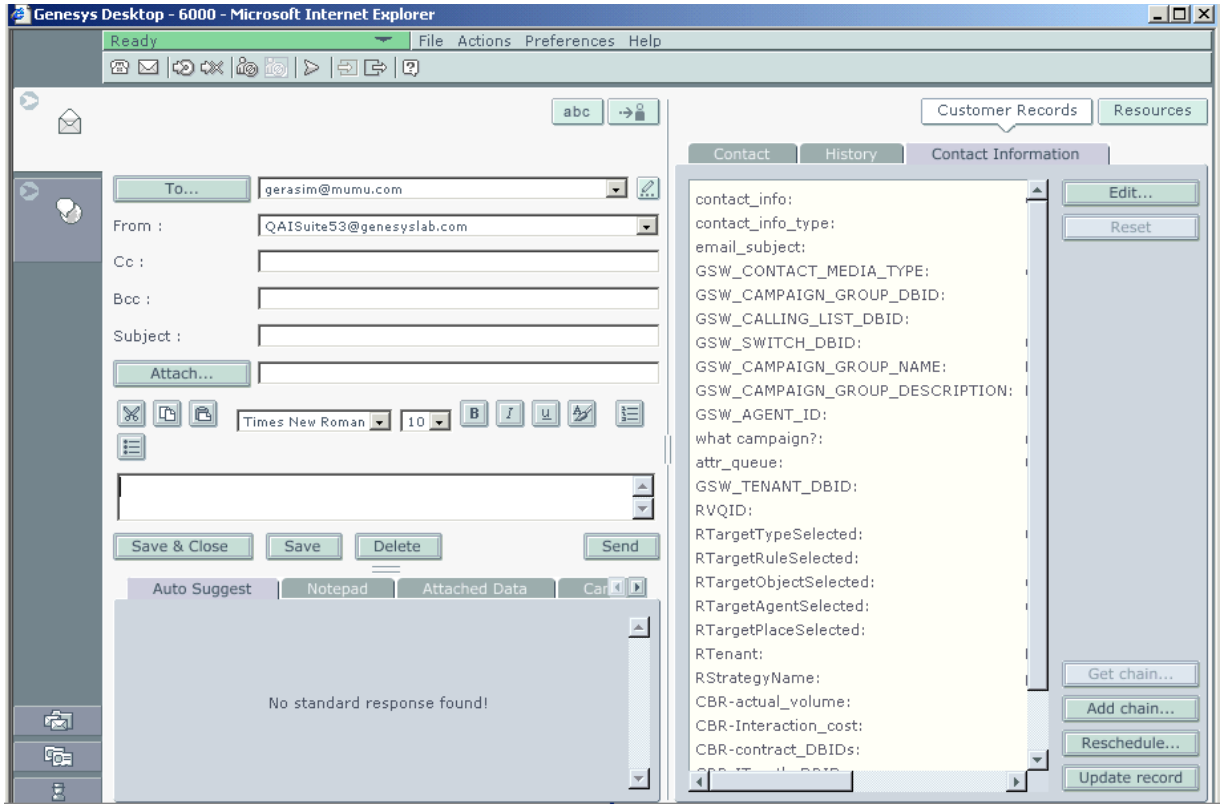

Figure 52: Generating E-mail Interaction After Outbound Preview

> Note: For detailed information on the Genesys Agent Desktop user interface, including how to use it to accept calls and `Push Preview` mode, consult the *Genesys Desktop 7.6 Agent Help*.

Appendix

Strategy Samples

This appendix demonstrates how to use IRD's Outbound strategy-building objects (see Figure 12 on page 50) for processing of Campaign List and Do Not Call List records solely from the logic of a routing strategy without agent intervention.

Be aware that Interaction Server must be installed in order to work with a Proactive Routing Solution.

This appendix is divided into the following topics:

Note: For information on routing interactions to the desktop, see "Delivering Proactive Interactions to Agent Desktop" on page 72.

Outbound Objects

The Outbound toolbar in the `Routing Design` window (see Figure 12 on page 50) provides strategy-building objects that support Genesys Outbound Contact. Figure 53 shows the toolbar for the Outbound objects.

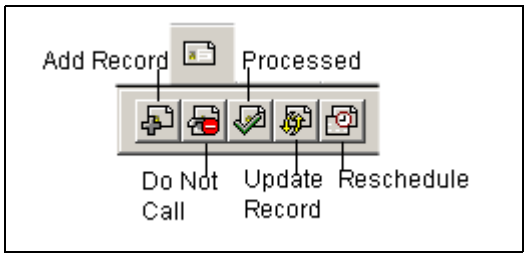

Figure 53: Outbound Objects Toolbar

> **Note:** The Outbound objects are designed to be used in strategies configured for proactive routing functionality, which are Open Media interactions processed with the `outboundpreview` media type.

This appendix contains sample strategies that demonstrate how to use the Outbound objects.

For additional information on using these objects, including field descriptions, returned results and fault codes, consult the *Universal Routing 7.6 Interaction Routing Designer Help*. Also see *Universal Routing 7.6 Reference Manual* and the *Outbound Contact 7.6 Reference Manual.*

Add Record

Use the Add Record object to automate building of Calling Lists by adding a new record to a specified Outbound List, such as a Calling List. For example, use to develop a Calling List, such as one to follow up on inbound calls that were abandoned during traffic peaks. You can then configure a routing strategy to detect abandoned calls and add records to the Calling List with the parameters of the incoming interactions. The Calling List can subsequently be used by an Outbound Campaign that dials out these customers during off peak hours and has the agent apologize and follow up.

Strategy in Business Process Using Add Record

Figure 54 shows a business process (see note on page 52) containing a strategy (`Outbound_AddRecord`) that uses the Add Record object.

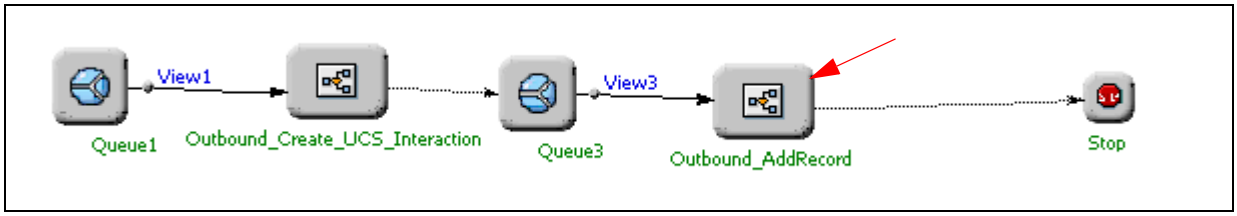

Figure 54: Business Process Containing Outbound_AddRecord Strategy

This business process uses a view (`View 1`) to extract a customer interaction from a queue (`Queue1`) and submits the interaction to a strategy (`Outbound_Create_UCS_Interaction`). This strategy creates a customer interaction record in the Universal Contact Server (UCS) Database associated with a new or existing customer and then writes the interaction to a queue (`Queue 3`). Another view exacts the customer interaction from the queue and submits it to a second strategy, `Outbound_AddRecord` (see Figure 55).

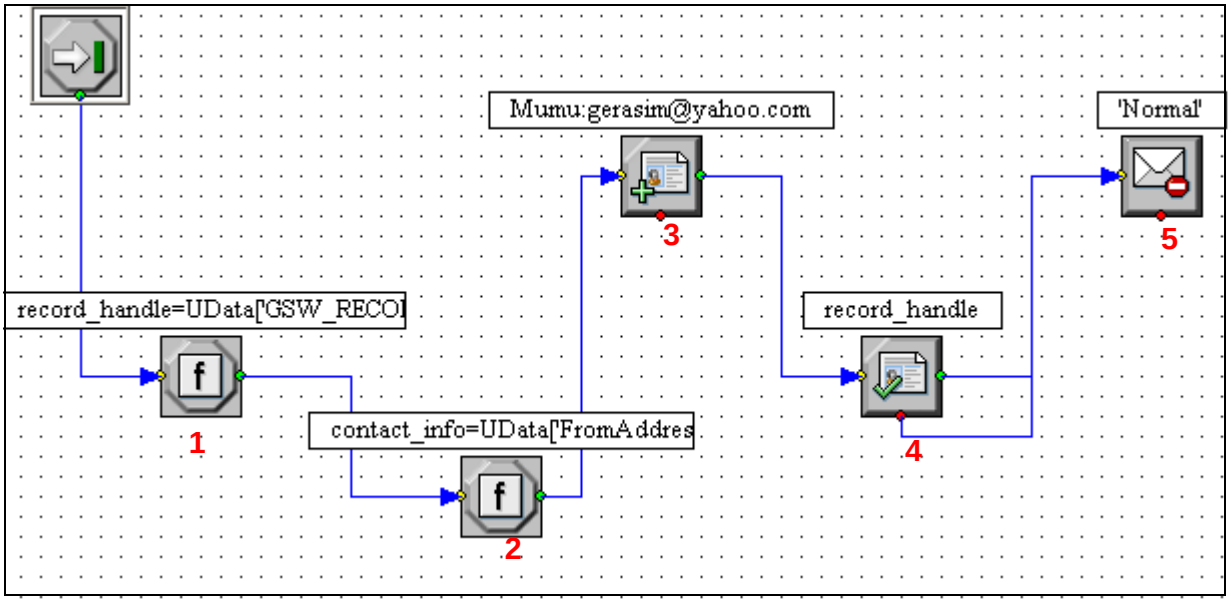

Figure 55: Outbound_AddRecord Strategy

The numbers below are keyed to the strategy shown in Figure 55.

1. After the Entry object in the upper left corner, the first object in the strategy is a Function object. Figure 56 shows its properties dialog box.

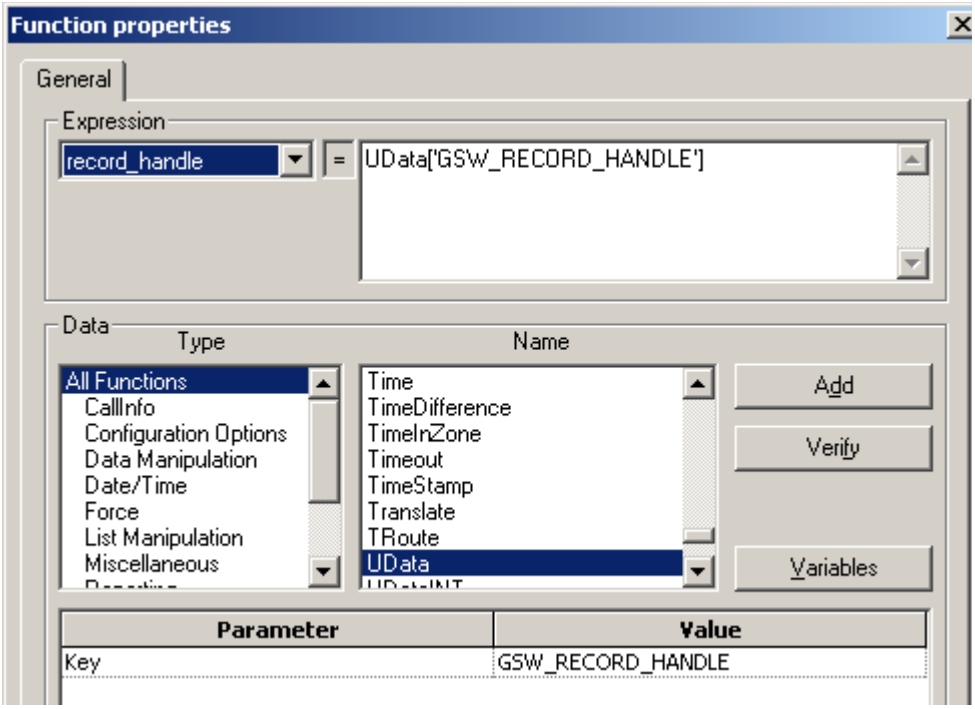

Figure 56: Function Object #1, UData Function

The function object uses the UData function to extract a value from the `GSW_RECORD_HANDLE` field and write it to the `record_handle` variable.

Note: When OCS retrieves a record, it creates a unique record identifier. (GSW_RECORD_HANDLE) that identifies the record. This attribute identifies the record to which attached data pertains in a user event. Any communication between Interaction Server and OCS concerning this record requires a key value with the GSW_RECORD_HANDLE. The key-value GSW_RECORD_HANDLE is internally generated and is not related to the RECORD_ID field of the call record.

2. The interaction then goes out the exit port to a second Function object (see Figure 57).

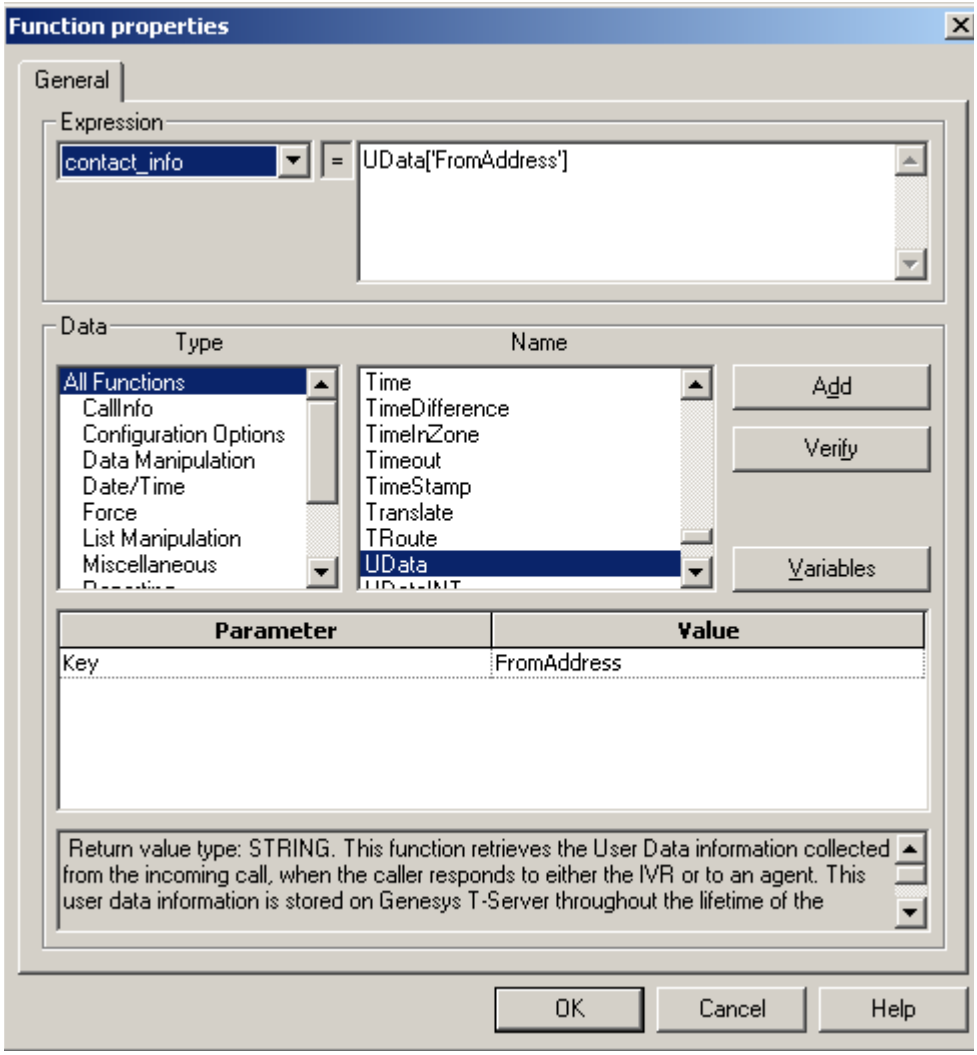

Figure 57: Function Object #2, UData Function

The function object uses the UData function to extract a value from the FromAddress field in the User Data (an e-mail address) and writes it to the contact_info variable.

3. The interaction then goes out the exit port to an Add Record object. Figure 58 shows its properties dialog box.

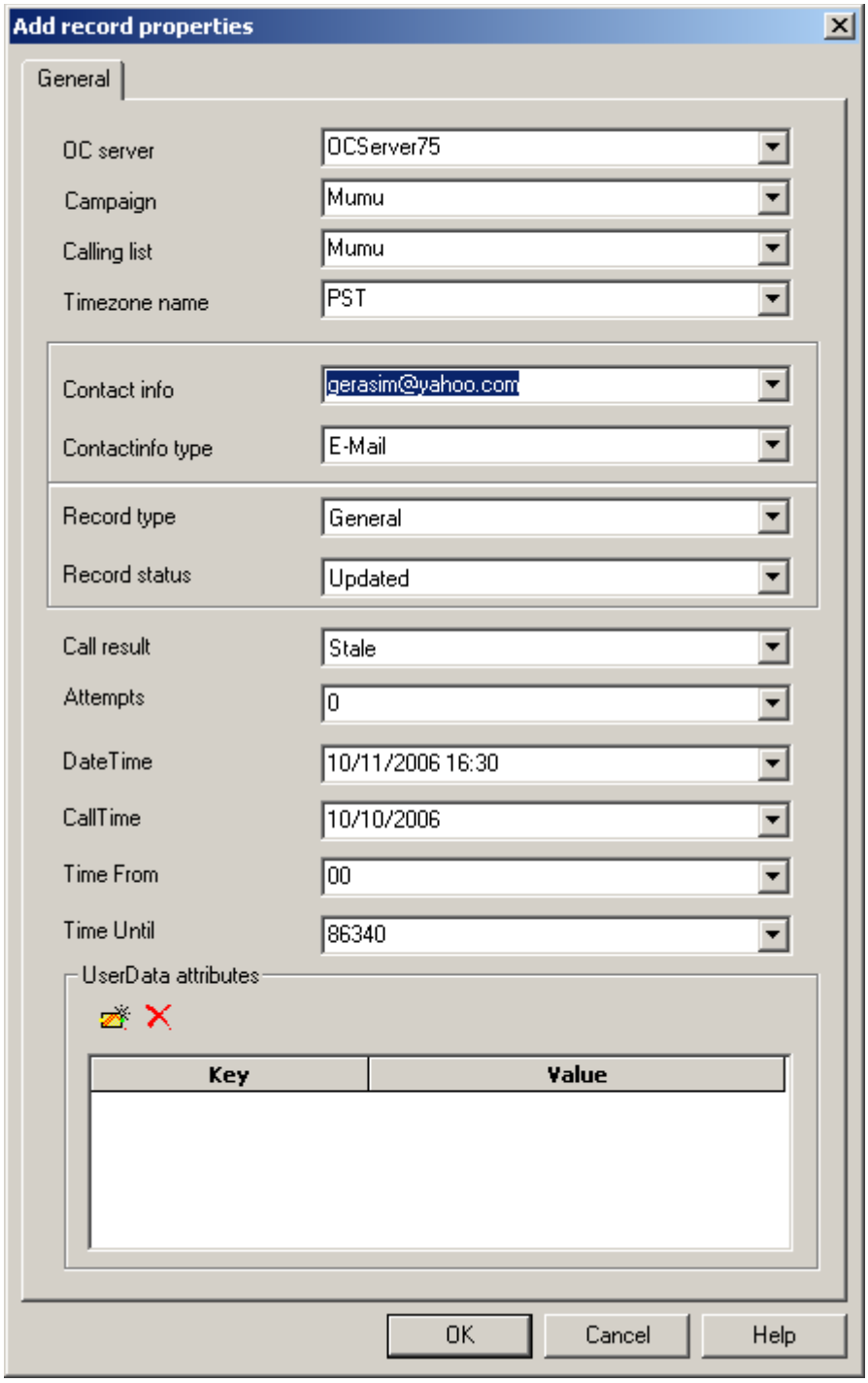

Figure 58: Add Record Object

The Add Record object adds the customer record to a `Campaign` named `Mumu` and a `Calling list` also named `Mumu`. The `Contact info` field takes its value from the `contact_info` variable (see Figure 59).

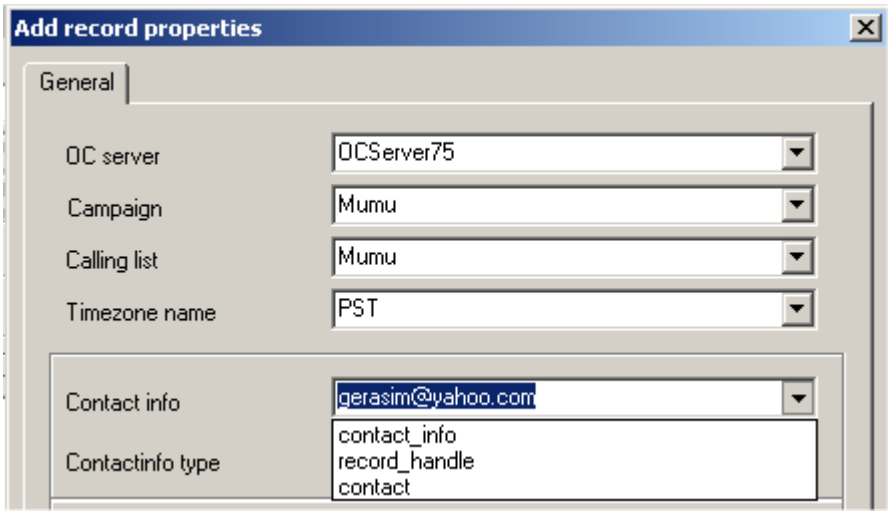

Figure 59: Contact Info value Taken From contact_info Variable

4. The interaction then goes out the exit port to another Outbound object, the Processed object.

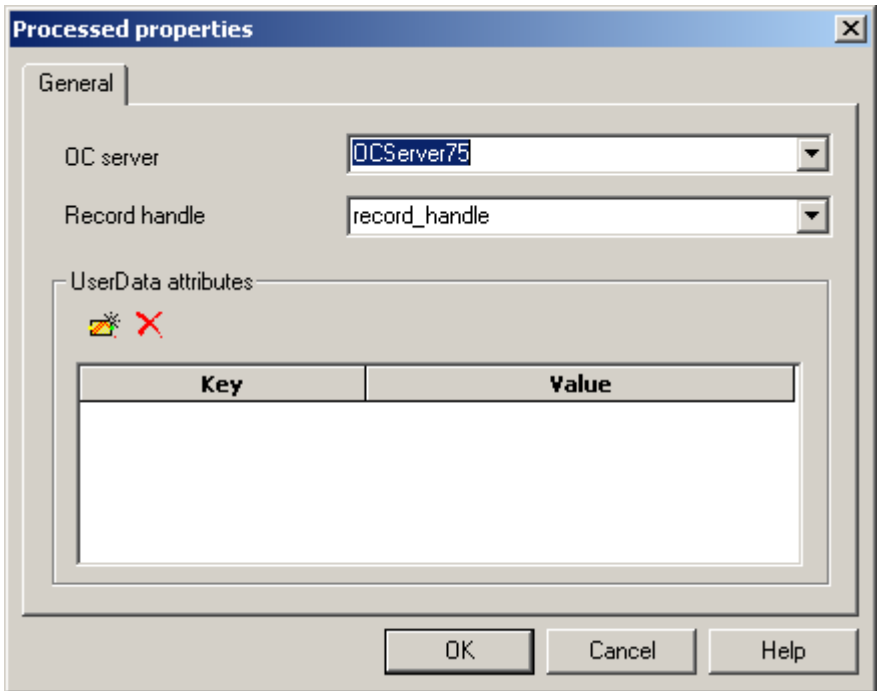

Figure 60: Processed Object

The Processed object marks a record as requiring no further handling. The value for the `Record Handle` field is taken from the `record_handle` variable.

5. The interaction then goes out the exit port to a Stop object (see Figure 61).

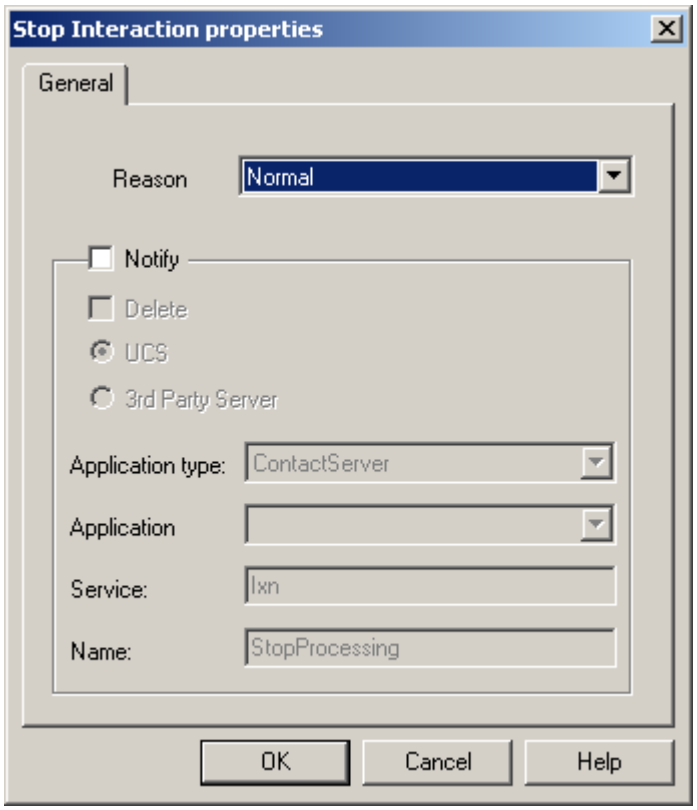

Figure 61: Stop Object, Reason: Normal

The Stop object notifies Universal Contact Server that interaction processing has stopped for a particular strategy in a business process (see Stop node in Figure 54 on page 94).

Do Not Call

Use the Do Not Call object to add a phone number or e-mail address to a specified Do Not Call List and mark the corresponding record as Do Not Call.

Note: Use the Do Not Call and Processed (page 104) objects to finalize Outbound record processing. You cannot use other Outbound objects to process records with the same Record Handle after using Processed or DoNotCall in a strategy flow.

The Do Not Call object prevents a record from being dialed by any Campaign. If a record is marked as Do Not Call, Outbound Contact Manager rejects all subsequent requests for the record.

When URS executes this object in a strategy, it sends (via Interaction Server) a DoNotCall request to OCS. Using the `GSW_RECORD_HANDLE` provided, OCS:

- Identifies the record and updates the record type as `NoCall`.
- Enters the phone number and e-mail address or customer ID of this record in the `gsw_donotcall_list` (table).

If you require more information on Do Not Call Lists in general, see the section on submitting Do Not Call requests in the *Outbound Contact 7.5 Reference Manual*.

Sample Strategy

Figure 62 shows a sample strategy containing a Do Not Call object.

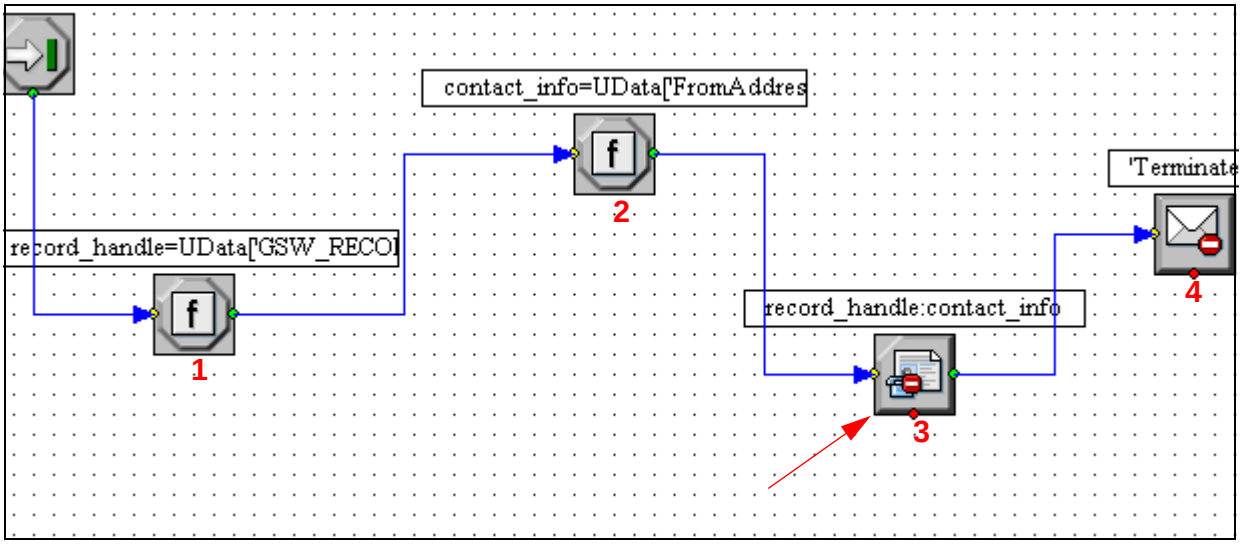

Figure 62: Strategy Containing Do Not Call Object

> Note: Assume that this strategy is contained in a business process similar to the one shown in Figure 54 on page 94 and that the interaction comes into the strategy from a queue in the business process.

The numbers below are keyed to the strategy in Figure 62.

1. After the Entry object in the upper left corner, the first object in the strategy is a Function object. Figure 72 shows its properties dialog box.

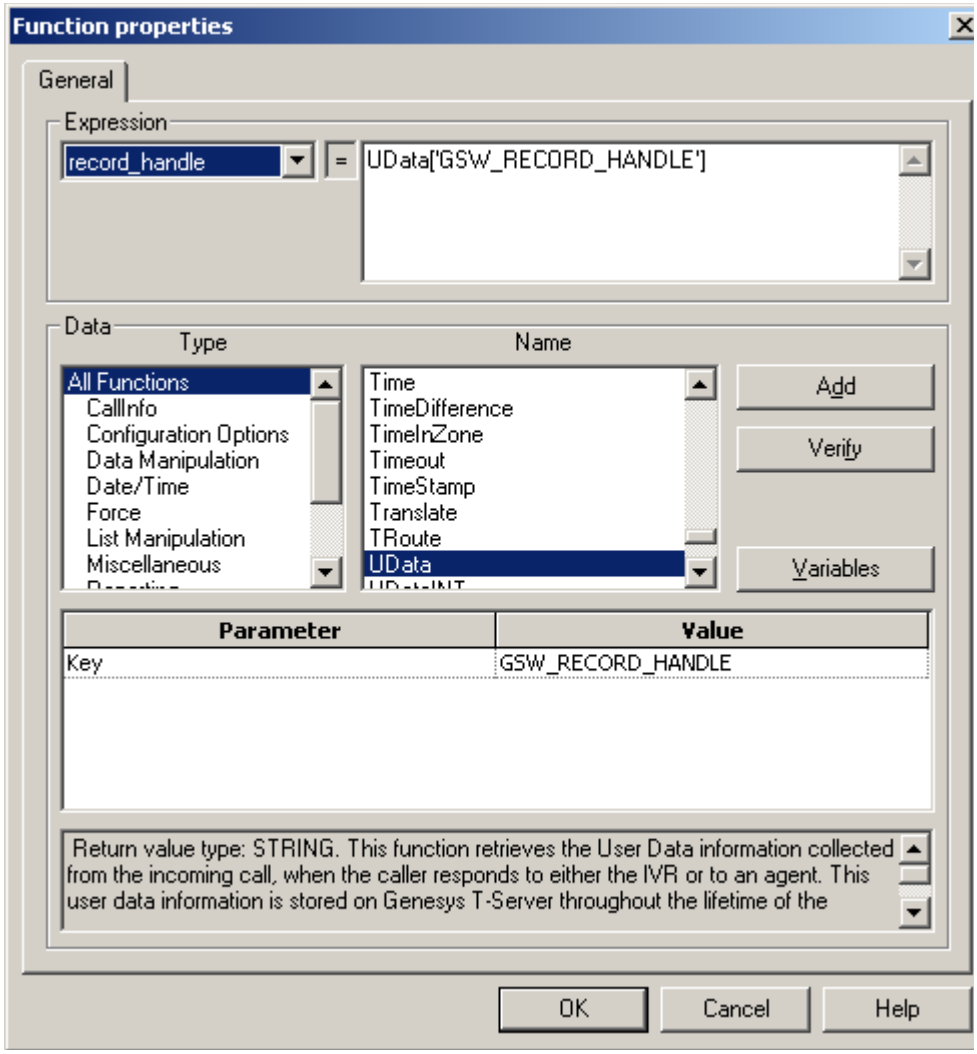

Figure 63: Function Object #1, UData Function

The function object uses the UData function to extract a value from the `GSW_RECORD_HANDLE` field (see note on page 96) on and write it to the `record_handle` variable.

2. The interaction then goes out the exit port to a second Function object (see Figure 57).

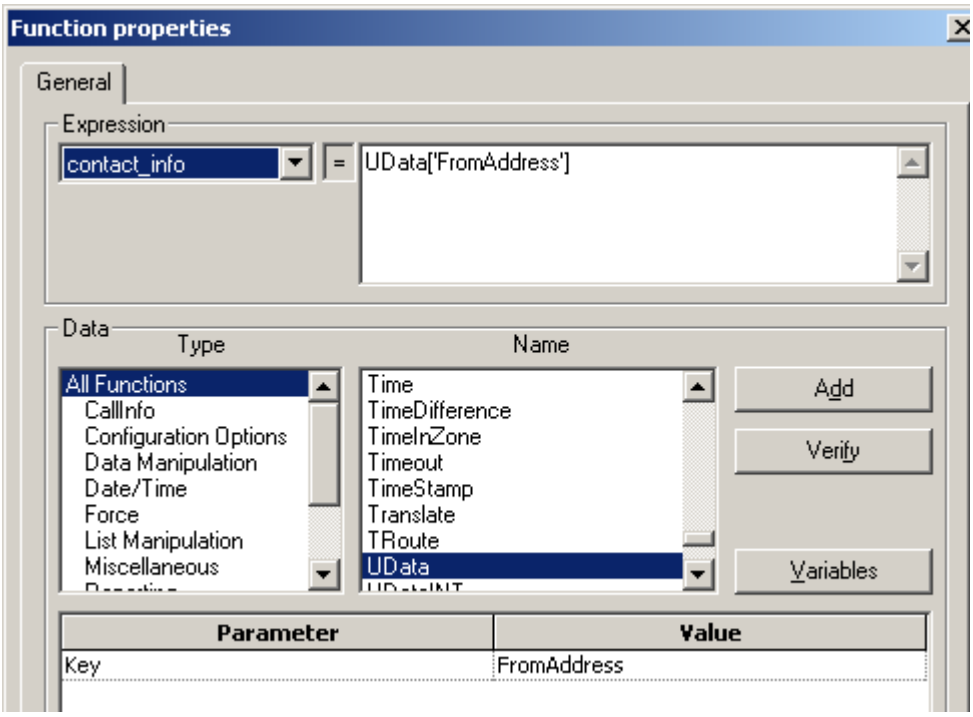

Figure 64: Function Object #2, UData Function

The function object uses the UData function to extract a value from the `FromAddress` field in the User Data (an e-mail address) and writes it to the `contact_info` variable.

3. The interaction then goes out the exit port to a Do Not Call object. Figure 58 shows its properties dialog box.

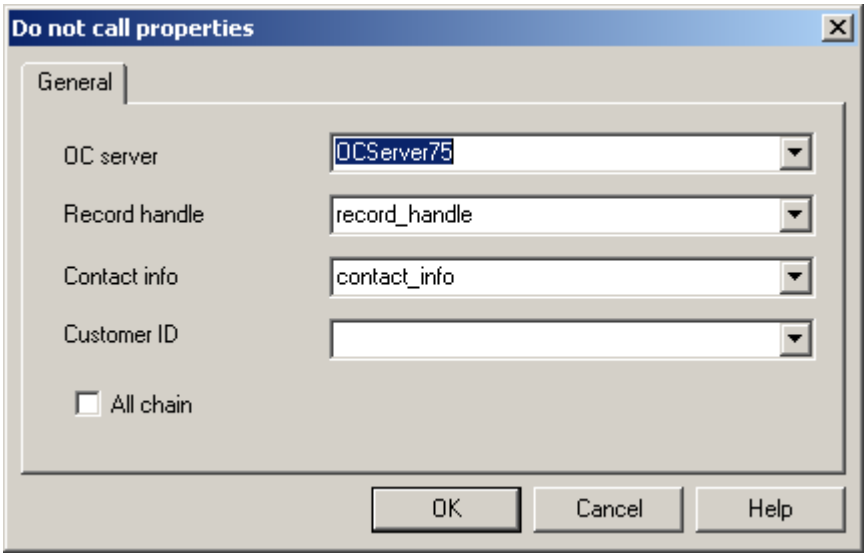

Figure 65: Do Not Call Object

This object updates the Calling List record that you specify via the `Record handle` field (see note on `GSW_RECORD_HANDLE` on page 96).

Note: You can specify the customer not to be contacted via the `Contact info` field or the `Customer ID` field.

The sample strategy uses the `Contact info` field, which gets its value from a variable called `contact_info`.

4. The interaction then goes out the exit port to a Stop object. (see Figure 66).

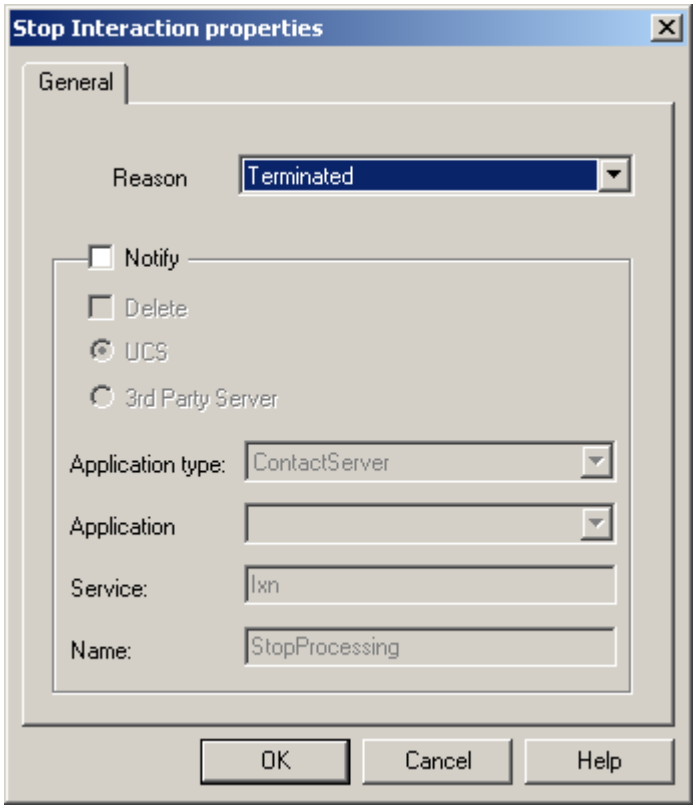

Figure 66: Stop Object, Reason: Terminated

The Stop object notifies Universal Contact Server that interaction processing has stopped for a particular strategy in a business process.

Processed

> Note: Use the Processed and Do Not Call (page 99) objects to finalize Outbound record processing. You cannot use other Outbound objects to process records with the same Record Handle after using Processed or DoNotCall in a strategy flow.

In the Outbound Contact 7.6 product, when an agent finishes processing a Calling List record, Genesys Desktop sends a `RecordProcessed` event to indicate that the record is processed and OCS updates the record accordingly. Use the Processed object in a strategy to have URS request that Outbound Contact Server finish processing a record created as a result of a customer call that was previously:

- Initiated from a Calling List
- Automatically dialed by the Genesys Outbound Contact product
- Routed to an agent when the potential customer answered

When URS executes this object in a strategy, it results in an External Service Request to Outbound Contact Server. Since the request goes through Interaction Server, you must have that component installed.

Sample Strategies

The following sample strategies demonstrate usage of the Processed object:

- Add Record, see Figure 60 on page 98.
- Update Record, see Figure on page 108

Reschedule Object

Use the Reschedule object to reschedule a customer call on a Calling List. A record is typically rescheduled during a call when a customer requests a callback at a certain time.

As described in the section on scheduling and rescheduling records in the *Outbound Contact 7.6 Reference Manual*, Outbound Contact supports two methods for rescheduling records:

1. Using `RecordReschedule` to reschedule a call.
2. Using `ScheduledRecordReschedule` when a rescheduled call cannot be completed and must be set for another time.

The Reschedule object emulates the first method. URS sends OCS (through Interaction Server) a `RecordReschedule` message and receives a `RecordRescheduleAcknowledge` in return.

When URS executes this object in a strategy contained in a business process, it results in an External Service Request to Outbound Contact Server.

Sample Strategy

Figure 67 shows a sample strategy containing a Reschedule object.

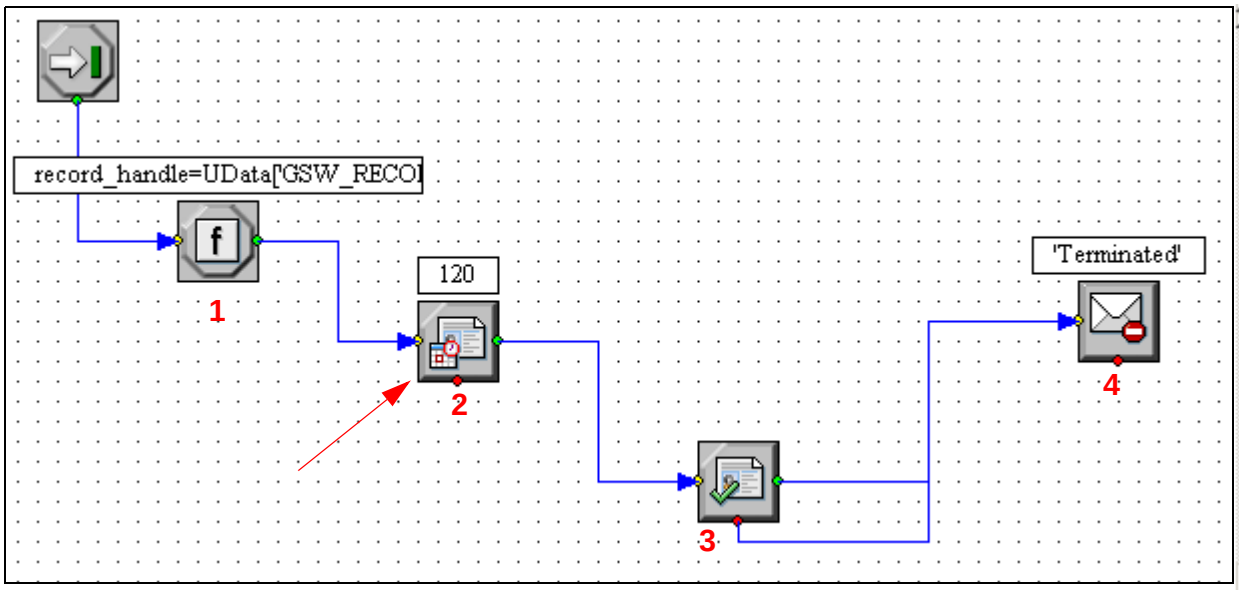

Figure 67: Strategy Containing Reschedule Object

Note: Assume that this strategy is contained in a business process similar to the one shown in Figure 54 on page 94 and that the interaction comes into the strategy from a queue in the business process.

The numbers below are keyed to the strategy in Figure 67.

1. After the Entry object in the upper left corner, the first object in the strategy is a Function object. Figure 68 shows its properties dialog box.

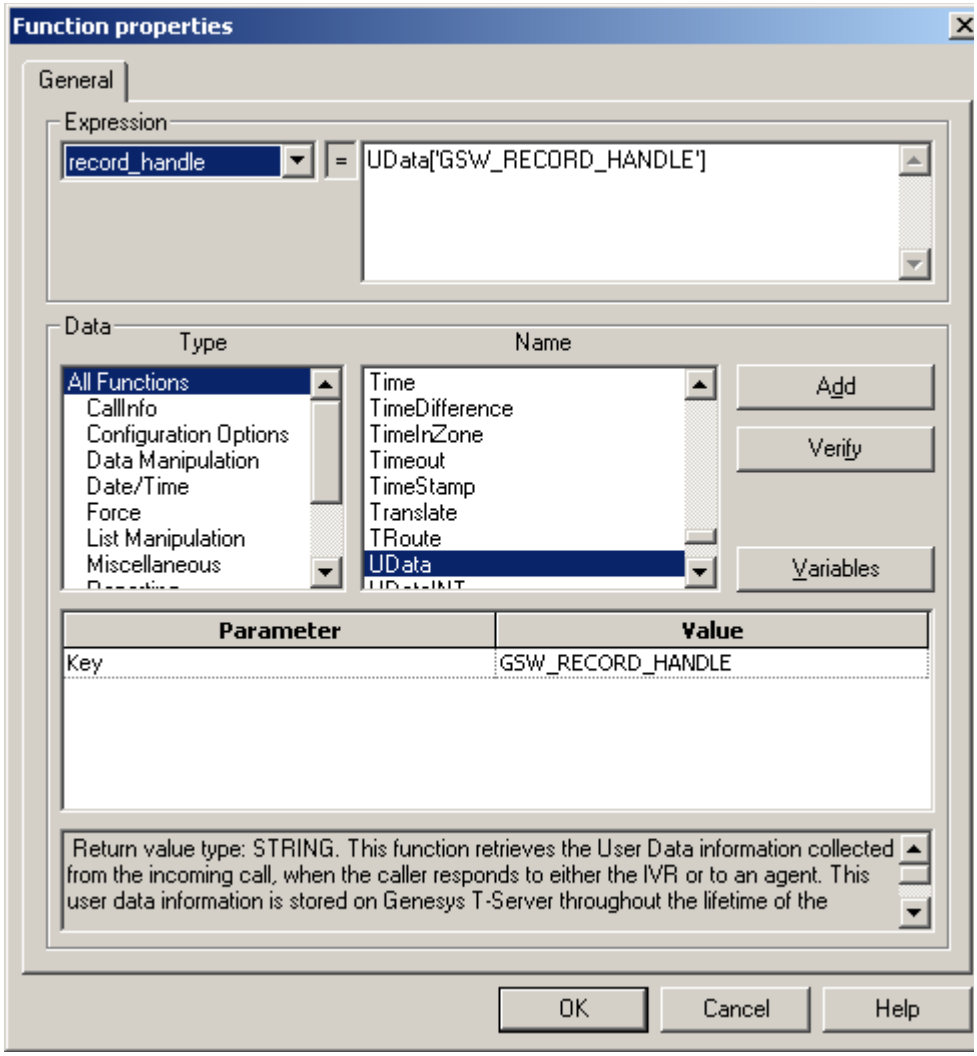

Figure 68: Function Object #1, UData Function

The Function object uses the UData function to extract a value from the `GSW_RECORD_HANDLE` field (see note on page 96) and write it to the `record_handle` variable.

2. The interaction goes out the exit port to an Outbound Reschedule object (see Figure 69).

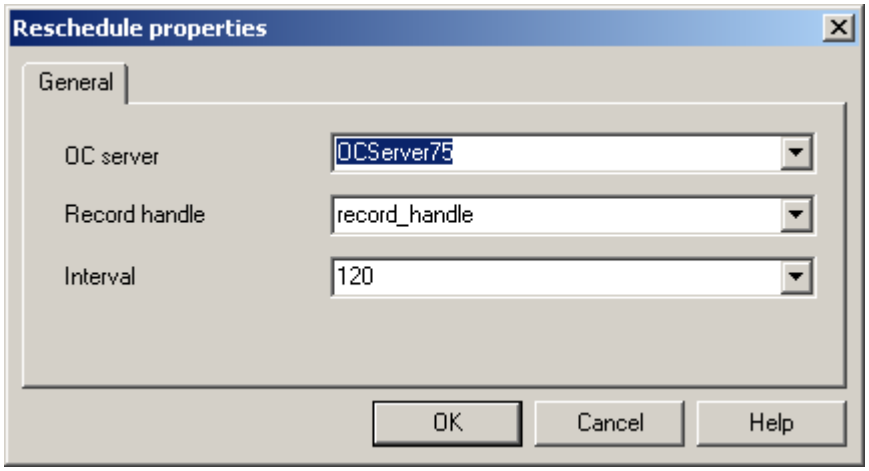

Figure 69: Reschedule Object

This object updates the Calling List record that you specify via the `Record handle` field (see note on `GSW_RECORD_HANDLE` on page 96). The Interval field can contain either the customer's requested callback time or you can select a variable for the interval in minutes from the requested callback time.

3. The interaction then goes out the exit port to a Processed object (see Figure 70).

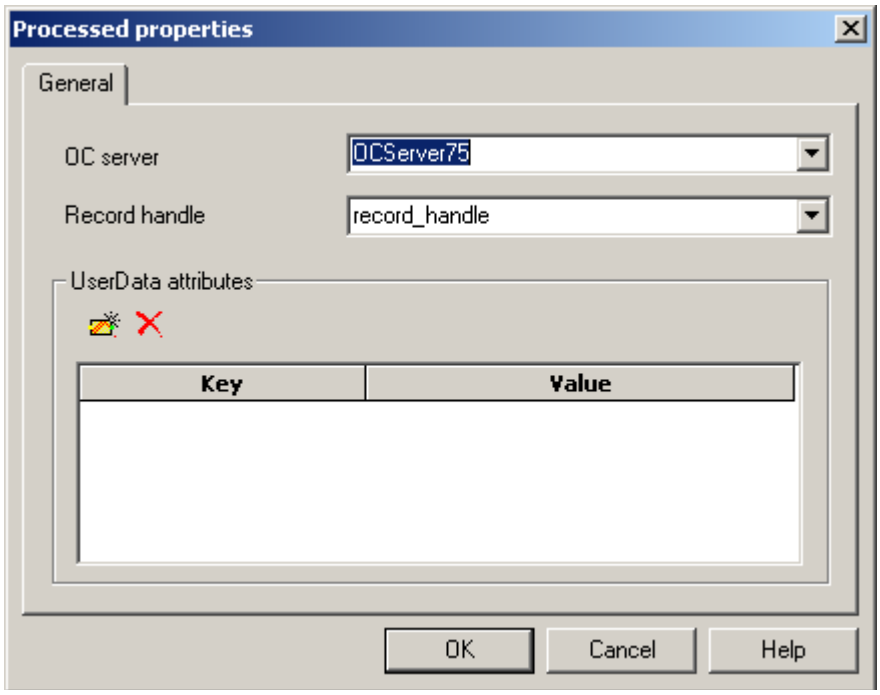

Figure 70: Processed Object

The Processed object marks a record as requiring no further handling. The value for the `Record Handle` field is taken from the `record_handle` variable.

4. The interaction then goes out the exit port to a Stop object (same as Figure 66 on page 103).

The Stop object notifies Universal Contact Server that interaction processing has stopped for a particular strategy in a business process.

Update Record

Use this object to update a Calling List record that you specify via a `RecordHandle` parameter (see page 96).

The resulting `UpdateCallCompletionStats` request updates Genesys modifiable mandatory fields and custom fields in a record to OCS. In Predictive Dialing mode, this request can be used to overwrite the call result detected by call progress detection when needed. Or you can overwrite a call result `answer` with the call result `wrong party`.

When URS executes this object in a strategy, it results in an External Service Request to Outbound Contact Server.

Sample Strategy

Figure 71 shows a sample strategy containing an Update Record object.

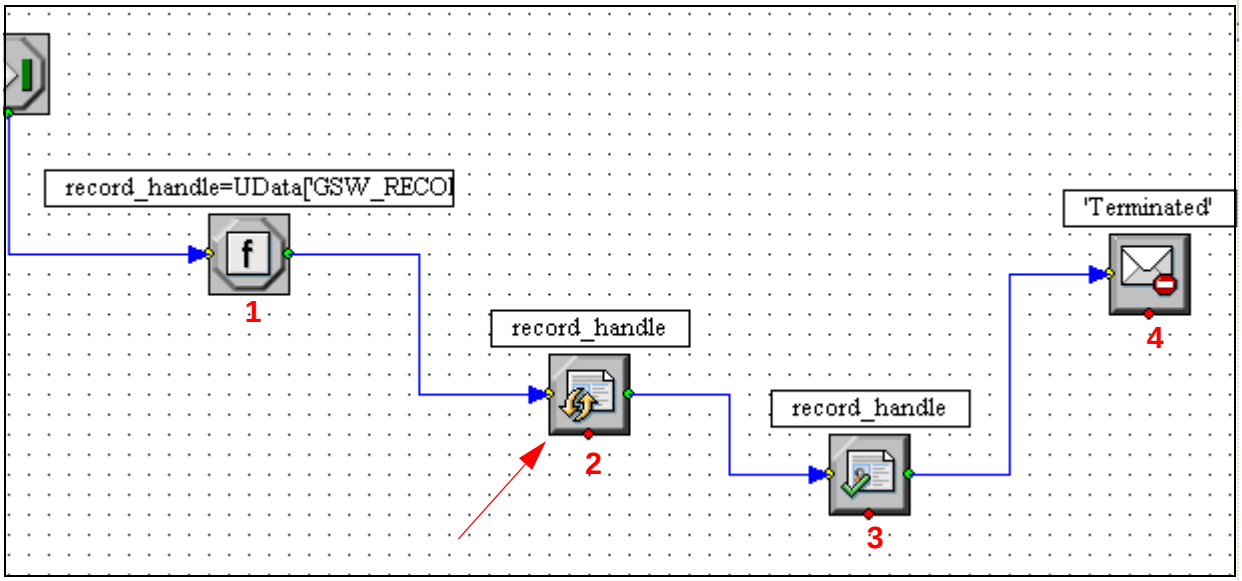

Figure 71: Outbound_UpdateRecord

Note: Assume that this strategy is contained in a business process similar to the one shown in Figure 54 on page 94 and that the interaction comes into the strategy from a queue in the business process.

The numbers below are keyed to the strategy in Figure 71.

1. After the Entry object in the upper left corner, the first object in the strategy is a Function object. Figure 72 shows its properties dialog box.

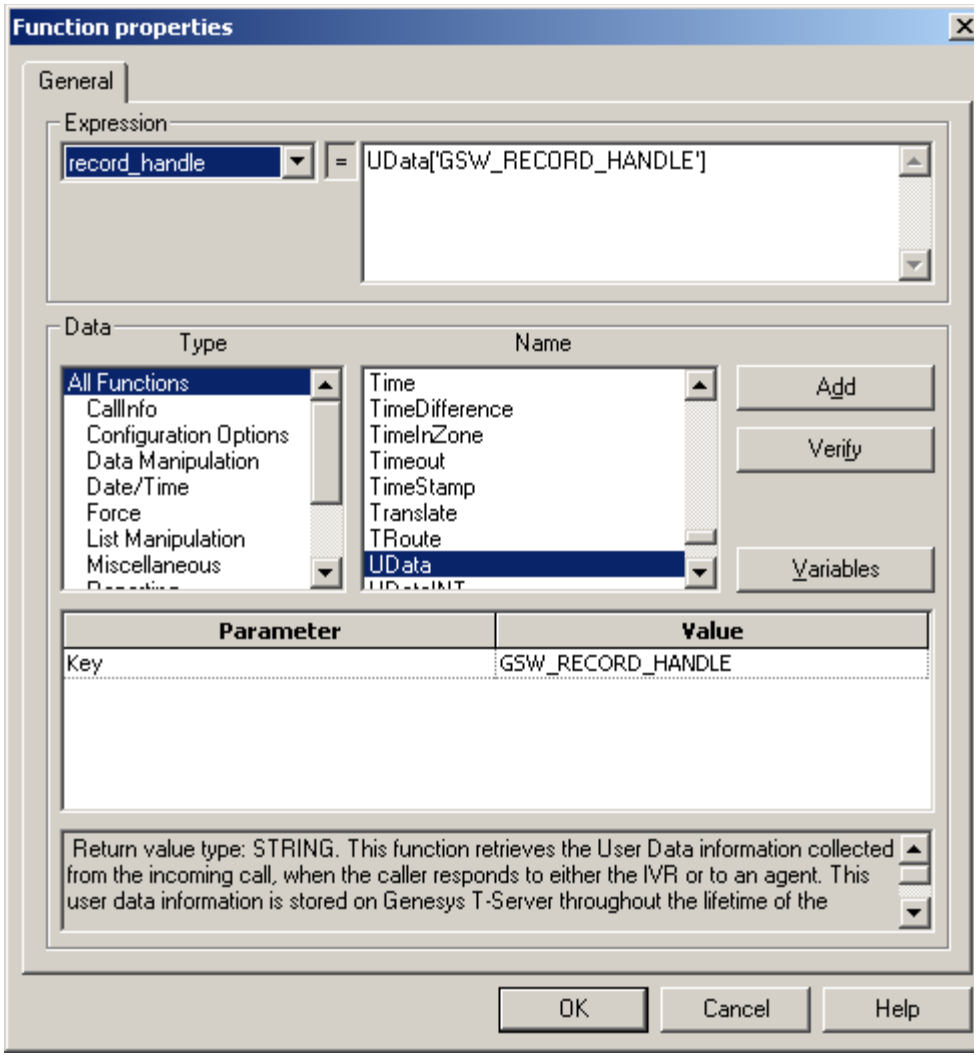

Figure 72: Function Object #1, UData Function

The Function object uses the UData function to extract a value from the `GSW_RECORD_HANDLE` field and write it to the `record_handle` (see note on page 96) variable.

2. The interaction then goes out the exit port to an Update Record object (see Figure 73).

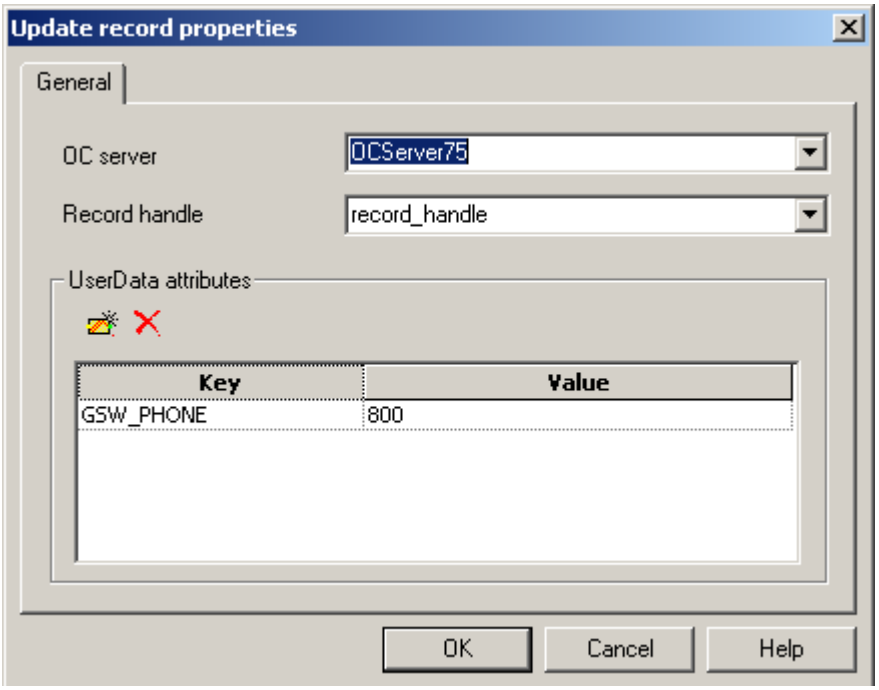

Figure 73: Update Record Object

This object updates the Calling List record that you specify via the Record Handle field (see note on `GSW_RECORD_HANDLE` on page 96). Under `UserData attributes`, the User Data `Key (GSW_Phone)` and `Value (800)` to be added/updated are specified.

3. The interaction then goes out the exit port to another Outbound object, Processed (same as Figure 70 on page 107).

The Processed object marks a record as requiring no further handling. The value for the `Record Handle` field is taken from the `record_handle` variable.

4. The interaction then goes out the exit port to a Stop object (same as Figure 66 on page 103).

The Stop object notifies Universal Contact Server that interaction processing has stopped for a particular strategy in a business process.

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