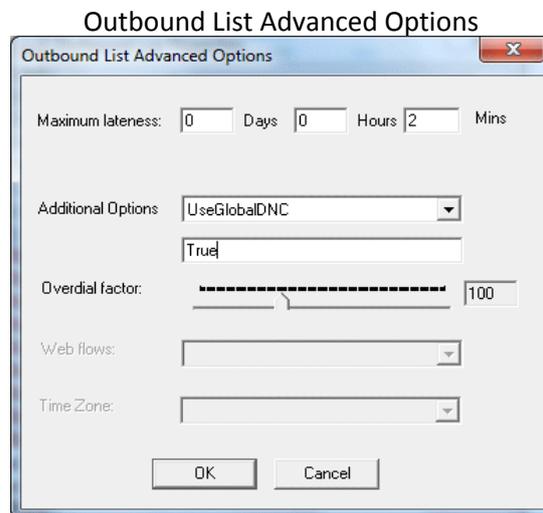
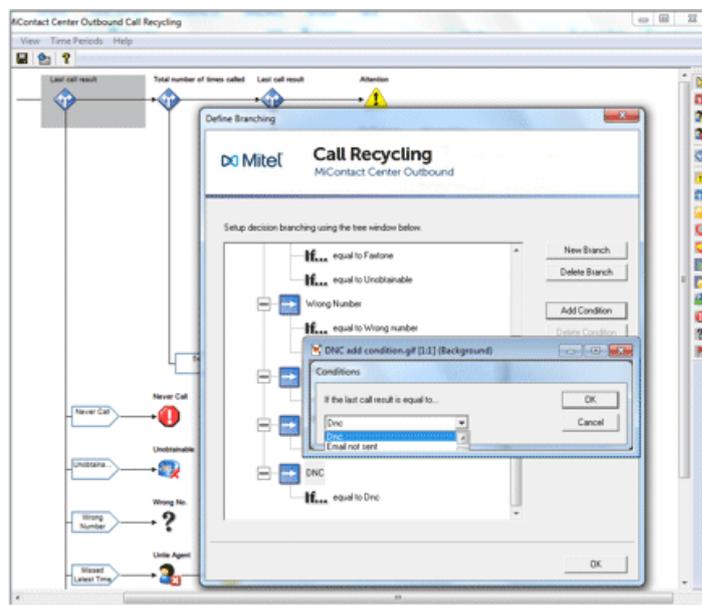


# IMPROVEMENTS TO THE DO NOT CALL PROCESS

## Synthesys.Net



## Recycling Designer



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## IMPROVEMENTS TO THE DO NOT CALL PROCESS

To reduce the impact of persistent nuisance calls in an automated (predictive) environment, Ofcom specify that in the UK, a telephone number receiving an abandoned or Nuisance Call (NC) may not be called again without the guaranteed presence of an agent for 72 hours and in case of an answering machine not for 24 hours. Please note that the call back period allowed may be different for other countries and can be adjusted accordingly.

To assist our customers with the compliance to Ofcom regulations, we have improved the functionality of our dialler and the Do Not Call (DNC) process. The improvements include:

- The **Phoenix\_DoNotCall** table
- **DNCScope**, Outbound list property setting
- **UseGlobalDNC** Outbound list property setting
- **DNC call result** in the Recycling rules
- **Dialler Web Service**



The **Phoenix\_DoNotCall table** is used to hold telephone numbers (and email addresses) from TPS and Do Not Call lists, and any additional information to inform the PD for how long a call should be blocked (i.e. 24 hours if the dialler detects an answering machine, or 72 hours in case of an abandoned/ nuisance call), if the call should be blocked universally (call centre wide), or only for a particular Entity (CRM prefix), account, campaign or call list, and if it only should be blocked when dialling predictively or also when making preview, power, or progressive dials.

The **DNCScope** Outbound list advanced property, (default set to Entity/ CRM Prefix), is used by the Predictive Dialler to determine which record to insert into Phoenix\_DoNotCall table in response to an abandoned/ nuisance call or answering machine (AMD). Described in Outbound Properties: DNCscope section below.

The **UseGlobalDNC** Outbound list advanced property, (default setting True), enables the PD to check the entries in the Phoenix\_DoNotCall table before making any calls. If the PD finds that a record should not be called for some reason, as specified in the Phoenix\_DoNotCall table, then it will recycle the record as 'DNC' instead of attempting to dial it. In the Recycling Designer, customers need to set up appropriate recycling rules to determine when the next dial attempt should be made for records marked as 'DNC' by the PD. Described in Outbound Properties: UseGlobalDNC section below.

In the **Dialler Web Service**, the new method 'AddToDoNotCallTable' is used to add entries to the Phoenix\_DoNotCall table from within a Synthesys webflow at runtime, using either the Web Service Input or Web Service Output Actions in the Synthesys.Net Interaction Studio (described in Dialler Web Service section below).



Contact centre administrators can adjust the DNC settings for individual Outbound lists using the UseGlobalDNC and DNCscope Outbound List Advanced Properties, described in more detail on pages 5 and 6. To discuss an overall change to the default behaviour to accommodate specific business requirements, please contact the Noetica Technical Support.

## THE PHOENIX DO NOT CALL TABLE

The Phoenix\_DoNotCall table holds telephone numbers (and email addresses) from TPS and Do Not Call lists, plus any additional information the PD needs to determine whether or not to make a call.

Available Fields:

Field Name	Example of Content	Description
<b>Id</b>	913	Will be generated automatically when importing data. (Sequential Number)
<b>Expires</b>	2016-07-09 15:56:37.237	The 'Datetime' up to which the call should be blocked, i.e. 72 hrs for nuisance calls, 24 hrs for Answer Machine. When the time displayed has expired, the PD will be able to dial the record again.
<b>Telephone</b>	07811353111	The Telephone number, or email address that should be blocked.
<b>Flags</b>	P	D – Do not dial (Preview/ Progressive) P – Do not dial (Predictive/ Power) E – Do not send emails S – Do not send SMS One or more of the options can be added. <b>DPS</b> , for example, means don't dial in preview/progressive mode, don't dial in predictive/ power mode and don't send SMS (for the specified time for this record).
<b>Scope</b>	Entity	Possible entries are either <b>List OR Campaign OR Workspace OR Entity OR Customer OR Global</b> Shows if the call should be blocked call centre wide (Global), or only for a particular Account (Workspace), <b>Campaign</b> , Outbound <b>List</b> , Customer id (Customer) or CRM prefix (Entity).
<b>Scopeld</b>	JANPD	For the entries LIST/ CAMPAIGN/ WORKSPACE, shows the Id (in Phoenix) of the object, i.e. for Entity, the CRM prefix (JANPD), for Customer, a combination of CRMPrefix.CustomerID (separated by a full stop, i.e. JANPD.TRN_29).
<b>Source</b>	Predictive Dialler	Information about the source of this record, i.e. Predictive Dialler <b>OR</b> DoNotCallTableControl, (showing Campaign ID and Sequence ID) <b>OR</b> DialWebService: Web Service  If you populate the table manually, enter free text into the Source field, for labelling your import.
<b>Info</b>	JANPD Predictive Dialler Nuisance Call to JANPD.TRN_29 at 2016-07-06 15:56:37	Additional information about the reason for the record, e.g. Predictive Dialler Nuisance call to CRMPrefix.CustomerId at <datetime>. If you populate the table manually, enter free text into the Info field, for labelling your import.



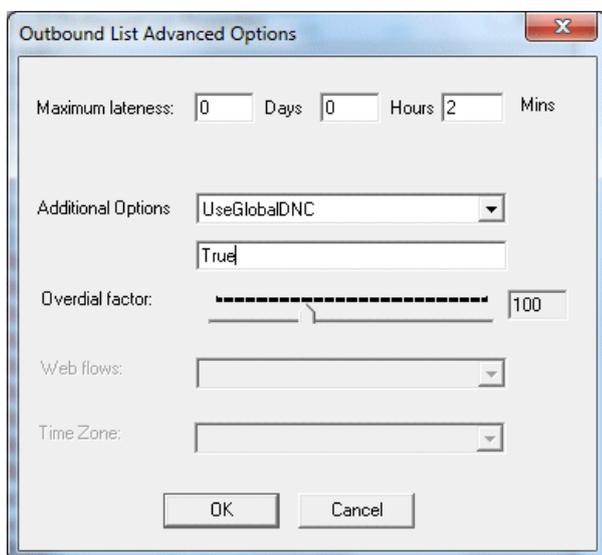
*The housekeeper, by default, is set to remove any entries that have expired for more than 30 days from the Phoenix\_DoNotCall table automatically. This default setting, like other Housekeeper settings, can be changed as required.*

## OUTBOUND PROPERTY: USE GLOBAL DNC

The **UseGlobalDNC** function is turned on by default for all outbound lists, to enable the PD to check entries in the Phoenix\_DoNotCall table, to determine whether or not to make a call.

To set **UseGlobalDNC** for individual outbound lists

- Right click on your Outbound list, and select **Properties**.
- In the **Outbound List Properties** dialog, click the **Advanced** button, to open the Outbound List Advanced Options page.
- From the Additional Options drop down menu select **UseGlobalDNC**.
- Set UseGlobalDNC to **True**, to enable the DNC procedure, allowing the PD to check the Phoenix\_DoNotCall table for DNC entries.



With **UseGlobalDNC** set to **True** (default setting), the PD will check the entries in the Phoenix\_DoNotCall table before attempting to dial the record. If the PD locates a record that should not be dialled, as per entry in the Phoenix\_DoNotCall table, it will recycle the call as 'DNC' instead of dialling it.

Ensure that you set up your recycling rules using the **DNC call result** in the Recycling Designer, to instruct the dialler when to attempt the next dial for DNC outcomes.

If the **UseGlobalDNC** is set to **False**, the PD will ignore entries in the Phoenix\_DoNotCall table, EXCEPT if the 'Source' of the record is Predictive Dialler, in which case the PD will follow the DNC process, regardless of the UseGlobalDNC setting.

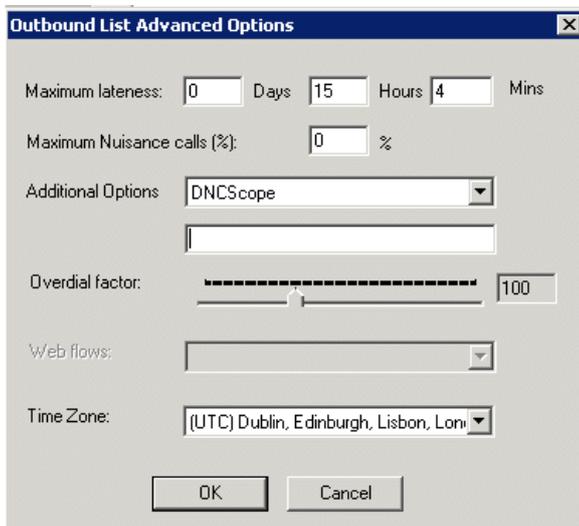
## OUTBOUND PROPERTY: DNC SCOPE

The **DNCScope** property is used by the Predictive Dialler when deciding which record to insert into Phoenix\_DoNotCall in response to an abandoned/ nuisance call or answering machine.

The default for the DNCScope is set to Entity (CRM Prefix) for all outbound lists, to ensure that the PD does not dial the specified telephone number for any customers for this CRM prefix for the specified time.

To override the default DNCScope setting for individual outbound lists

- Right click on your Outbound list, and select *Properties*.
- In the **Outbound List Properties**, click the **Advanced** button, to open the *Outbound List Advanced Options* page.
- From the *Additional Options* drop down menu, select **DNCScope**.
- Enter **Global** to specify that the call should be blocked **Globally** (Call Centre wide), OR **Entity** to block the call for this CRM prefix (default setting), or, if you only wish to block the call for a particular customer id, list, campaign or workspace (account), enter either **Customer**, OR **List**, OR **Campaign** OR **Workspace**.
- Enter **None**, if you do NOT wish the Predictive Dialler to enter any records for the selected Outbound list into the Phoenix\_DoNotCall table.




The **DNCScope** property can be used in combination with the **UseGlobalDNC** property.

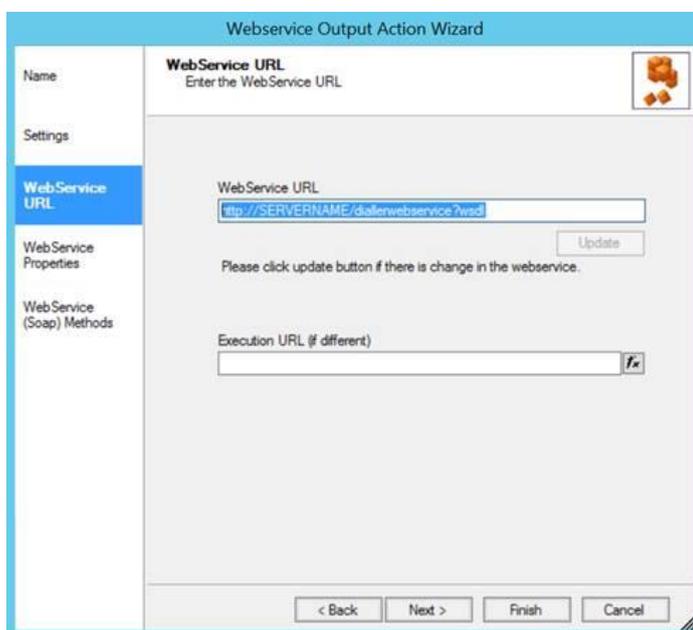
If the **DNCScope** is set, either for the List OR Campaign OR Workspace OR Entity OR Customer OR Global, and the **UseGlobalDNC** is **True** (default setting), the PD will follow the DNC process, checking the Phoenix\_DoNotCall table for blocked calls.

## DIALLER WEB SERVICE

In the **Dialler Web Service**, the method 'AddToDoNotCallTable' is used to add entries to the Phoenix\_DoNotCall table from a Synthesys webflow at runtime.

To connect to the dialler web service, you can either use the **Web Service Input Action** (to update the Phoenix\_DoNotCall table immediately) or the **Web Service Output Action** (to update the table on finishing the call).

- Open the Synthesys.Net Interaction Studio.
- Select the **Web Service Input** or **Web Service Output Action** from the *Core Actions* part of the Toolbox and drop it at the desired part of the Webflow (In our example, we have used the Web Service Output Action).
- Enter a name for the Web Service Output Action, and in the **Settings** page, under the **Webflow Filter** option, select if the output that you generate should include aborted calls or not, or aborted calls only.

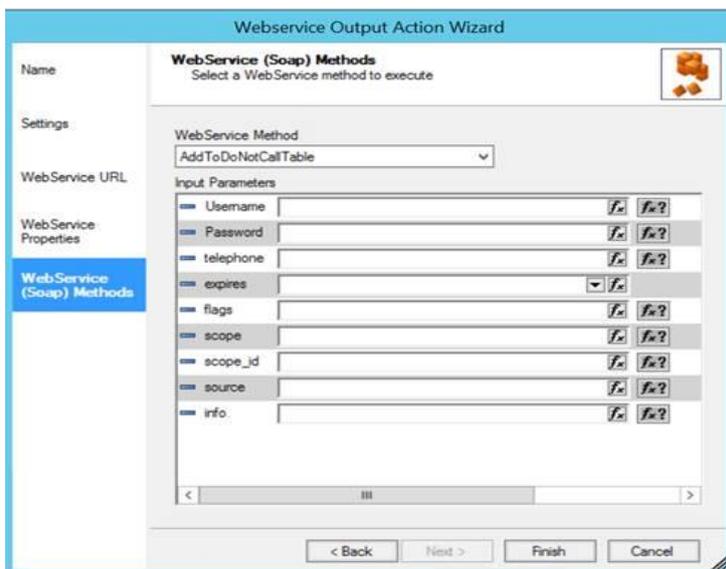


- In the **Web Service URL** part of the wizard, enter the details of the web service that you wish to call, i.e. `http://servername/diallerwebservice?wsdl`. If the URL that is used at runtime is different to that used at design time when taking test calls, you can enter or calculate the **Execution URL** into the Execution URL field.
- The *WebService properties* page will display any properties that are available from the web service, and allows the user to set the values to be sent to the properties.
- The *WebService Methods* page displays the methods that are available from the web service and allows users to specify any data that is required for these methods.

## WebService Methods

In the *WebService Methods* page of the Web Service Action wizard

- Select “AddToDoNotCallTable” to display the corresponding parameters available for this method.
- Set the values to be passed to each parameter. These can be hard coded or you can set a calculation using the calculations  icon, to make the parameter dynamic.



Option	Used to add/ specify
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<b>Username</b>	Synthesys user credential/ name
<b>Password</b>	Synthesys user password
<b>telephone</b>	The telephone number or email address that should be blocked.
<b>expires</b>	The expiration date and time [clarify this]
<b>flags</b>	D – Do not dial (Preview/ Progressive) P – Do not dial (Predictive/ Power) E – Do not send emails S – Do not send SMS Adding <b>DPS</b> , for example specifies don't dial in preview/progressive mode, don't dial in predictive/ power mode and don't send SMS for the specified time for this record.
<b>scope</b>	Specify if the call should be blocked at a <b>Global level</b> (Call Centre wide), or only for a particular <b>Customer, Entity</b> (CRM prefix), call <b>List, Campaign</b> or <b>Workspace</b> (account).
<b>scope_id</b>	Used to block a particular LIST or CAMPAIGN or WORKSPACE or ENTITY. To block a specific list, for example, enter the Outbound ID for that list, to block a specific CAMPAIGN, enter the Campaign ID, to block a specific WORKSPACE, enter the Account ID, to block a specific ENTITY, enter the CRM prefix.
<b>source</b>	Information about the source of this record, i.e. DiallerWebService: Web Service
<b>Info</b>	Any additional information regarding the entry, as required.

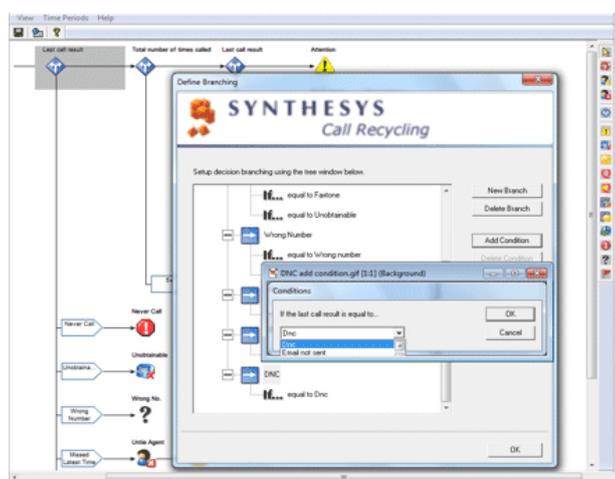
Click **Finish**, to display the configured Web Service action in the webflow design area.

## RECYCLING DNC CALL RESULT

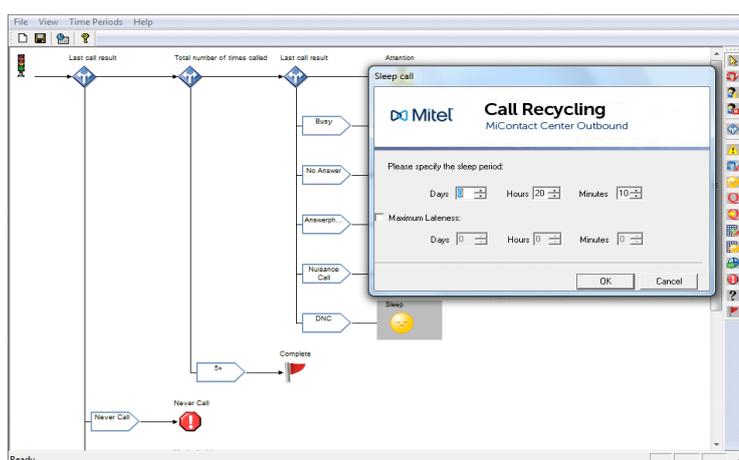
Any outcome marked as 'DNC' by the PD needs to be dealt with in the Recycling engine, by creating recycling rules based on the **DNC** call result, to specify when the PD is to attempt the next dial.

The Synthesys Call Recycling Designer is launched from the Outbound Manager.

- Locate and right click on the relevant outbound list and select **Set Recycling Rules** from the drop down menu.
- Add a new branch called **DNC** to your first **Last call result** branch in the Recycling Designer, add the condition **Dnc** to your DNC branch and click ok.



- End the DNC branch with a Sleeping icon and sleep it for the appropriate time, as relevant to your business.
- Before making the next dial, the PD will check entries in the Phoenix\_DoNotCall table. If it finds that the record is still blocked, it will recycle the record again as 'DNC' instead of attempting to dial it.



*If the Dnc option is not enabled in Synthesys Call Recycling, please contact the Noetica technical support, who will add the option to the recycling results table for you.*

# NOTES