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THE DO NOT CALL PROCESS

This document details the Do Not Call Process feature of the Synthesys Dialler.

The Do Not Call Process has been specially designed to allow customers flexibility in terms of how they manage customer instructions/wishes to opt out of being contacted whilst allowing the operator to adhere to regulatory constraints or internal compliance rules.

Core to this process is the barring of telephone numbers or email addresses so that no contact may be made with a specified contact.

Key components used to maximise the benefits of this feature are as follows:

- The Phoenix_DoNotCall table (held within the systems Phoenix database)
- DNCScope, Call List Property setting.
- UseGlobalDNC Call List Property setting.
- DNC Call Result in the Recycling Rules
- Dialler Web Service

The **Phoenix_DoNotCall table** is used to hold telephone numbers (and where relevant email addresses) as well as additional information such as to inform the Dialler for how long a call should be blocked from being called. If the call should be blocked universally (call centre wide), or only for a particular Entity (CRM prefix), Campaign or List, also if it should be blocked when dialing predictively or also when making preview, power, or progressive dials.

The **DNCScope** Settings property (default set to Entity/ CRM Prefix) is used by the Dialler to determine which record to insert into the Phoenix_DoNotCall table.

The **UseGlobalDNC** Settings property **(**default setting ticked = True) notifies the system to check the entries in the Phoenix_DoNotCall table before making a call.

DNC Call Result is a configurable call outcome that allows you to add details to the DNC table following a customer expressing a wish to not be contacted.

The **Dialler Web Service** API contains a method 'AddToDoNotCallTable' that allows developers to build an application to add entries to the Phoenix_DoNotCall table.

The Phoenix Do Not Call Table

The Phoenix_DoNotCall table holds telephone numbers (and email addresses where relevant) plus any additional information the Dialler needs to determine whether to allow a call.

Records can be added to the Do Not Call Table via Recycling Actions, via the Dialler Webservice API (for which documentation can be supplied) or by inserting records directly into the table using SQL. Field definitions are as follows:

Field Name	Example of Content	Description
Id	913	Will be generated automatically when importing data. (Sequential Number)
Expires	2016-07-09 15:56:37.237	The 'Datetime' up to which the number should be blocked from being dialled.
Telephone	07811353111	The Telephone number, or Email address that should be blocked.
Flags	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. **DPS**, for example, means do not dial in preview/progressive mode, do not dial in predictive/ power mode, and do not send SMS (for the specified time for this record).
Scope	Entity	Entries are either **List** OR **Campaign** OR **Workspace** OR **Entity** OR **Customer** OR **Global** Shows if the call should be blocked call centre wide (Global), or only for a particular Account (Workspace), Campaign, Outbound List, Customer id (Customer**)** or CRM prefix (Entity).
ScopeId	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).
Source	Predictive Dialler	Information about the source of this record, i.e. Predictive Dialler **OR** DoNotCallTableControl, (showing Campaign ID and Sequence ID) **OR** DialWebService: Web Service If you populate the table manually, enter free text into the Source field for labelling your import.
Info	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 module is set to remove any entries that have expired more than 30 days ago from the Phoenix_DoNotCall table automatically. This default setting, like other Housekeeper settings, can be changed as required. For more information about this please contact your Noetica representative.

Populating the DNC Table

There are three methods of inserting record(s) into the table. These may be used in isolation or conjunction with each other.

Dialler Web Service

As part of the **Dialler Web Service API** the method 'AddToDoNotCallTable' is used to insert entries to the Phoenix_DoNotCall table. Parameters in the table should be set as outlined in the specification shown in the above table.
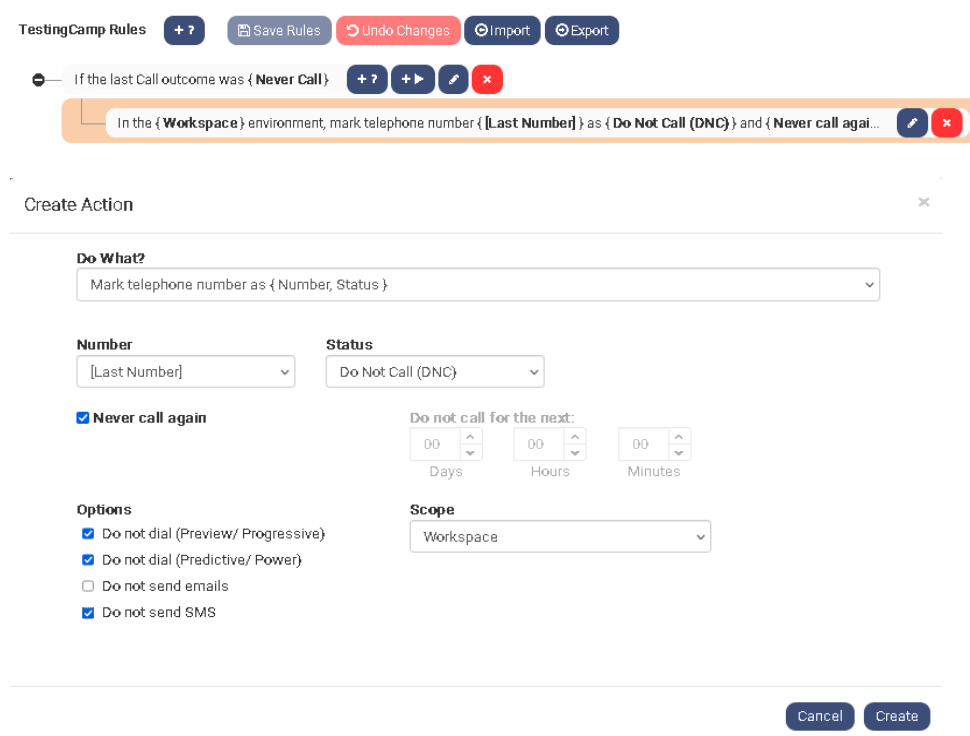
The web service API is provided as a SOAP API. For further information on this and other API methods available please contact your Noetica Representative.

Using the Outcome of a Call

By default, the system generated outcomes (when in predictive mode) Answerphone and Nuisance Call will lead to an entry being inserted into the DNC call table. Whilst primarily to comply with strict regulations in the United Kingdom this is seen as best practice but may be changed on request if you wish to alter this behaviour (please speak to your Noetica representative).

Calls with an outcome of Answerphone are inserted into the table with an expiry date /time 24 hours in the future. Calls with an outcome of Nuisance Call are inserted into the table with an expiry date/time 72 hours in the future.

Using the Recycling module within Campaign Manager further outcomes may be added. For example, in the action below in the Recycling Editor, a rule has been created that inserts the last number dialled into the table where the outcome Never Call is used.

Direct SQL Insertion

An advanced method for populating the table this is commonly used where large volumes of records need to be inserted in the table for example when bringing in a list from a 3rd party source such as a CRM. This process requires Noetica engineering resources. Please contact your Noetica representative.
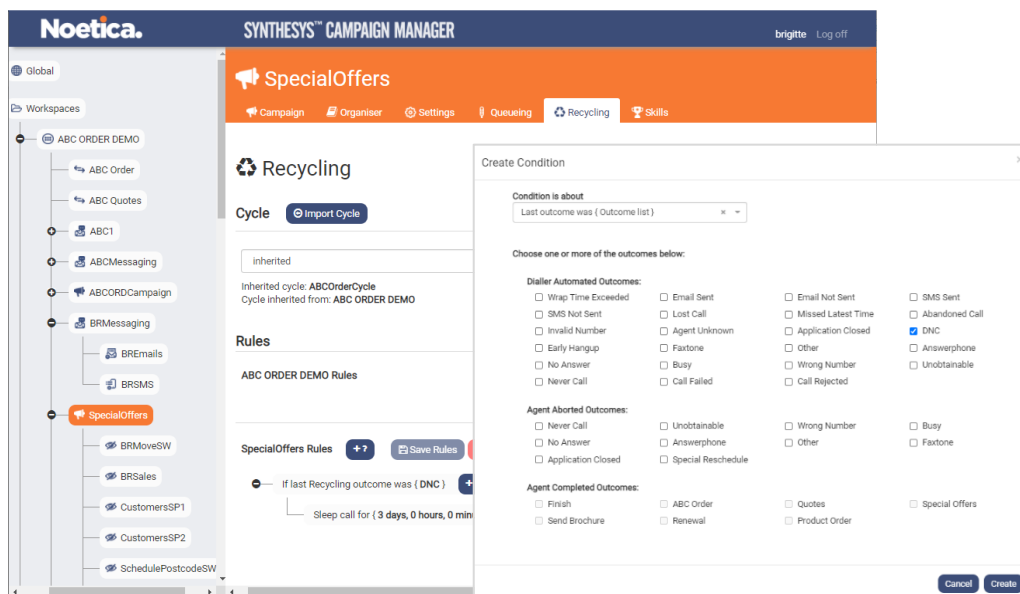
RECYCLING DNC CALL RESULT

When a call (or email) from an outbound campaign list is barred and classified by the system as DNC it will immediately be recycled.

This is true regardless of call type (preview or predictive). It is necessary to consider this when designing your recycle rules as otherwise the record will be returned to the Queue state and another contact attempt will be made. As it is likely to still be barred, a circular action will occur (often referred to as "spinning").
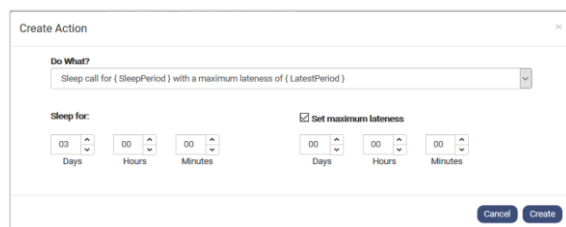
To avoid this, any outcome marked as 'DNC' by the dialler needs to be dealt with in Recycling with an appropriate rule.

To create your DNC recycling rule and required action, select the list in the tree in Campaign Manager, select the **Recycling (**Call Recycling) tab at the top right of the dialog. In the **Rules** section of the recycling dialog:

- Click the **+? Create Condition** button at top root level.
- From the **Condition is about** menu, select **Last Outcome was** and tick **DNC.**

- Next, click the **+> Action** button on the '' Last Outcome was {Dnc}' rule.
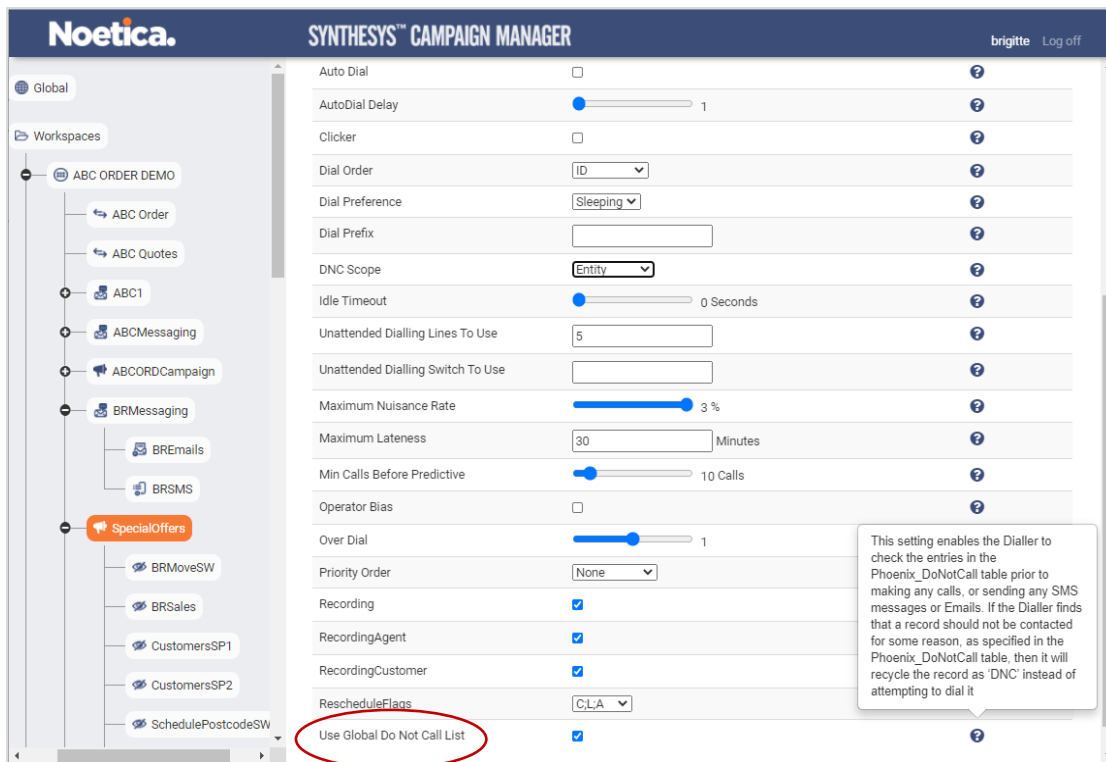- From the **Do What** menu, select Sleep call for {SleepPeriod} with a maximum lateness of {LatestPeriod}.

- Select the appropriate time to sleep the record, as relevant to your business.
- If you tick the Set maximum lateness box, you can also select the latest time during which to present the record.
- Before making the next dial, the system 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.
- Clearly if you never wish to call this record again, create an Action to Stop Recycling.

USE GLOBAL DNC LIST SETTING

The **UseGlobalDNC** function tells the system that for this list it is to check the Do Not Call table. By default, is selected for all Lists.

To set **UseGlobalDNC**

- Select the Campaign or List that you want to view or manage.
- Click the **Settings** tab..
- Scroll down the list of properties displayed to **UseGlobalDNC.**
- Tick the UseGlobalDNC box to set the property to **True,** enabling the DNC procedure, allowing the system to check the Phoenix_DoNotCall table for DNC entries, prior to dialling or sending SMS or Email messages.

Disabling the Global Do Not Call List checkbox may be useful in scenarios where it would not necessarily be appropriate for customers to opt out of contact. For example, collections activity or where emergency contact was required.

*If the UseGlobalDNC is set to **False**, the system will ignore entries in the Phoenix_DoNotCall table, EXCEPT if the 'Source' of the record is Predictive Dialler, in which case the system will follow the DNC process, regardless of the UseGlobalDNC setting (this again is to ensure the regulatory compliance mentioned earlier is adhered too).*
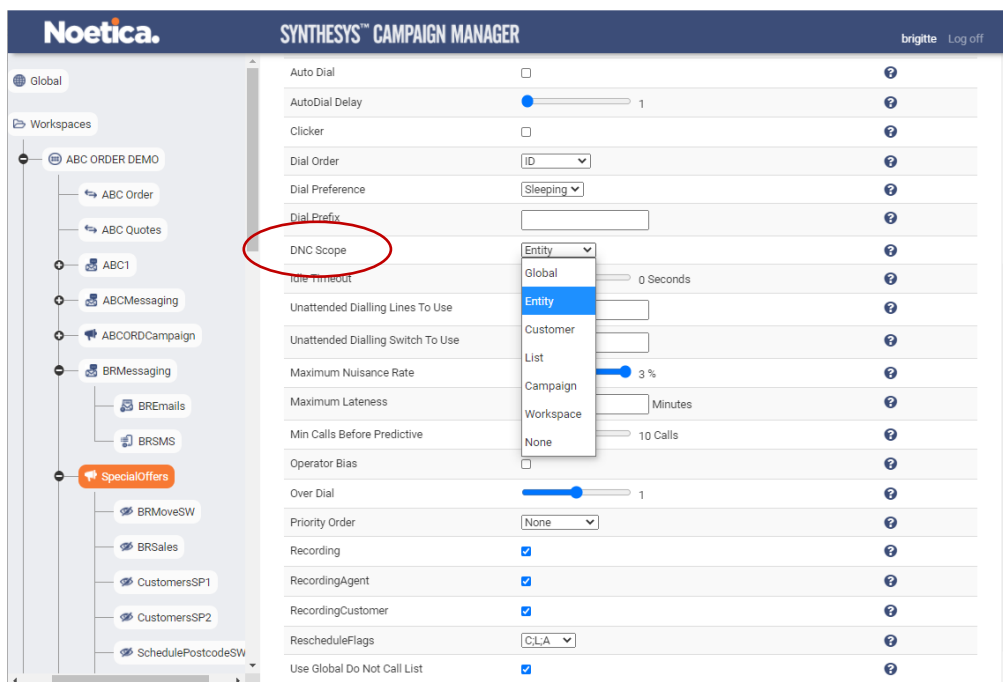
DNC SCOPE LIST SETTING

The **DNCScope** property is used by the Dialler to determine the scope when inserting a contact number into the Phoenix_DoNotCall. This could be in response to a call classified as an abandoned/nuisance call or answering machine or it could be based on a configured outcome in Recycling.

Note that the parameters passed to the Phoenix_DoNotCall table for Nuisance calls and Answerphones are usually set to a default. Please contact your Noetica Representative as mentioned to discuss changing this behaviour.

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

To override the default DNCScope setting

- Select the campaign or list that you want to view or manage.
- Click the **Settings** tab at the top right of the Campaign Manager dialog.
- Scroll down the list of properties displayed, to **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 call 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 system will follow the DNC process, checking the Phoenix_DoNotCall table for blocked calls.