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Outbound Contact Deployment Guide

Typical Data Flow Scenarios

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Typical Data Flow Scenarios

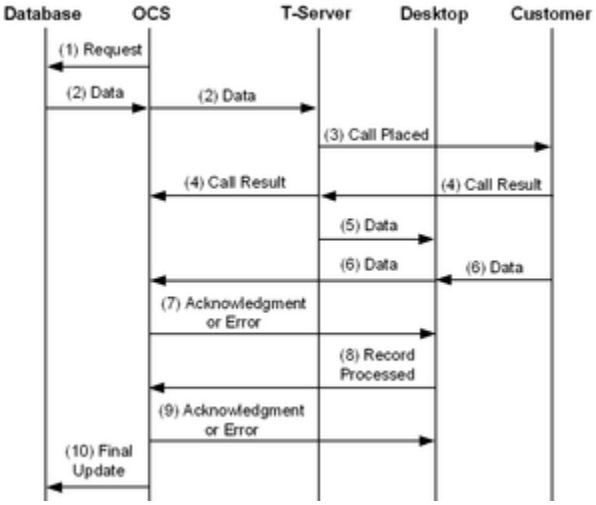
The following sections describes typical dialing scenarios for Predictive mode (or Progressive mode) and Preview mode.

Predictive Mode (or Progressive Mode)

The following is a typical data flow scenario for Predictive mode or Progressive mode:

1. When an outbound dialing session for the Campaign Group is started, OCS places the call.
2. If the call is answered by a "live" voice, it is connected to an agent. User data attached to the call is delivered to the agent's desktop.
3. The agent updates the user data and the call result. The agent then either processes the call or, if requested by the customer, reschedules the call for a later time as a personal or campaign callback.

The following figure illustrates the data flow for a typical Predictive mode or Progressive mode call. In this instance, the switch has Call Progress Detection (CPD) capability, and T-Server requests the switch to dial the customer number. Alternatively, you could configure the system with the CPD Server, which uses a Dialogic board to dial the call. In either case, the agent is already logged in to the system.



Predictive Mode Data Flow

OCS sends a request to the database to retrieve a record.

A record is sent back to OCS, which forwards it to T-Server along with a request to initiate a call.

T-Server initiates the call.

T-Server, or another device, interprets the call and determines that the call should be forwarded to an

agent. The call result information goes back to OCS.

At the same time, T-Server transfers the call and customer-specific information to an agent. The agent and the customer are now connected.

The customer provides data to the agent, who updates the record. This information might include a rescheduled call date and time, a do not call back request, or other data. The agent sends the updated record to OCS.

After receiving the request, OCS sends an acknowledgment or error message back to the agent.

Note:	The agent can update the record as many times as necessary. With each update, OCS stores the data to its internal buffer and responds with an acknowledgment or error message.

When the agent and customer have finished, and the call ends, the agent sends the final event to OCS that the record is completed.

OCS responds to the agent desktop with either an acknowledgement that the transaction is complete or with an error message.

At the same time, the final update goes to the database.

Preview Mode

The following is a typical data flow scenario for Preview mode:

1. The agent requests that Preview mode begin.
2. The agent requests a preview record.
3. The agent either rejects the record or makes the call.

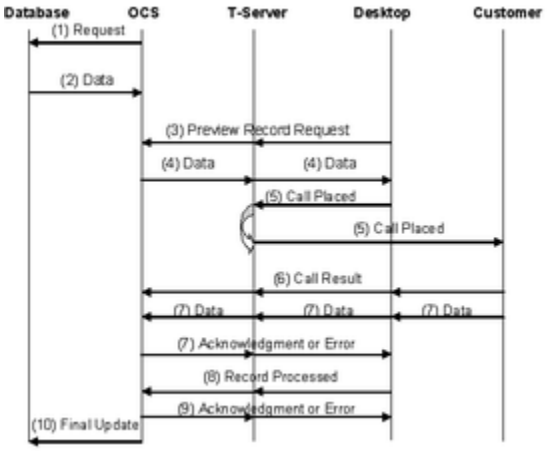
- If the agent rejects the record, it is returned to OCS. The agent then has two choices:
  - Request the end of Preview dialing mode and log out.
  - Return to Step 2.
- If the agent makes the call and if the customer requests no further calls for this campaign or no more calls ever, the agent requests OCS to mark the record as RecordCancel or DoNotCall. The agent then has two choices:
  - Return to Step 2.
  - Request the end of Preview dialing mode and log out.

If the call reaches the customer, the agent updates the call results and custom fields. Next, the agent can terminate the call, sending the final call transaction back to OCS, or the customer can ask to reschedule the call.

- The agent then receives the rescheduled record. The agent then has two choices:

    - Return to Step 2.
    - Request the end of Preview dialing mode and log out.
- If the call does not reach the customer, the agent can call an alternate (chained) record.
- If there are additional records in the chain, the agent requests a chained preview record and returns the beginning of this Step 3.
- If there are no additional records in the chain, the agent updates the call results and custom fields, sending the final call transaction back to OCS. The agent then has two choices:
    - Return to Step 2.
    - Request the end of Preview dialing mode and log out.

The data flow for Preview mode starts differently from that of the data flow for Predictive mode or Progressive mode, but is identical once the agent is connected to the customer. The following figure illustrates the data flow for a typical Preview mode call. The agent is already logged in to the system.



Preview Mode Data Flow

1. The agent reports to OCS that the agent is ready to begin work in Preview mode.
2. OCS sends back an acknowledgment or error message.
3. The database sends a record or records to OCS, which forwards the records to the agent. These records might include previously scheduled calls.
4. The agent signals T-Server to initiate a call. T-Server initiates the call.
5. T-Server determines that the call is connected and signals the agent. The agent determines the status of the connection (fax, answering machine, modem, or customer). If the call is connected to a customer, the agent proceeds with the call.
6. The customer provides data to the agent, who updates the record. This information might include a rescheduled call date and time, a Do Not Call request, or other data. The agent sends the updated record to OCS.
7. OCS either sends an acknowledgment or error message back to the agent.

Note:	The agent can update the record as many times as necessary. With each update, OCS stores the data to its internal buffer and responds with an

	acknowledgment or error message (Steps 6 through 8).

8. When the agent and customer have finished, and the call is terminated, the agent sends the final event to OCS that the record is completed.
9. OCS sends the agent either an acknowledgment that the transaction is complete or an error message.
10. At the same time, OCS sends the final update to the database.