



Administering Avaya Proactive Outreach Manager

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Chapter 1: Introduction

Purpose

This document provides information about how to use the features of Avaya Proactive Outreach Manager.

Intended audience

This document is intended for contact center administrators who want to create and manage agent-assisted or automated outbound campaigns for the voice, email, SMS, and custom channels.

Change history

Issue	Date	Summary of changes
4.1	November, 2025	The following information is updated: • New in this release section is updated. • In the Purge Schedules page field descriptions topic, Database Reindexing field description is added. • In the Edit POM Server page field descriptions and in the POM Global Settings page field descriptions, the Load Monitor Service component is added in the Categories and Trace Levels field. • In the POM Health Monitor page field descriptions, System Load tab detail is added. • In the following topics, a note about restrictions due to heavy load is added: - Contact Lists overview - File Splitter overview - Do Not Call (DNC) overview - Creating a data source schedule - Running a data source - Upload Contacts page field descriptions - About contact data source • Information related to POM monitor and cache service is removed as POM monitor and cache service are obsolete from this release. • In the New Contact List page field descriptions, the plus (+) character to the list of disallowed characters for the Name field. • In the Purge Schedules Overview topic, a note about purge restriction is added. • In the Purge Schedule Configurations chapter, Database reindexing overview topic is added. • In the POM Home page field descriptions topic, System Restrictions widget information is added. • In the Call node topic, note added in the Preview Time (Sec) field about the time mismatch of a few seconds due to network latency.

Table continues...

Issue	Date	Summary of changes
		• In the POM Reports topic, a note about report restriction is added. • In the POM Manager page field descriptions, Load Monitor component is added to the Service Names. • In the POM Servers Overview topic, Load Monitor service detail is added.
Release 4.0.2 SP4, Issue 1	Feb 2025	The following information is updated: • User interface is updated for the following pages: - Agent Address Books - Agent Attributes - Agent Configuration - Agent Group Configuration • The Contacts tab and the Excluded Contacts tab is updated to display only 15 column attributes by default. • Updated the table for the supported date and time formats for databases in filter templates.

Table continues...

Issue	Date	Summary of changes
Release 4.0.2 SP3, Issue 1	June 2024	The following information is updated: • In the POM Home overview topic, more information about System Notifications widget is added. • In the POM Home page field descriptions topic, more information about System Notifications widget is added. • In the New / Edit Filter Template page field descriptions topic, in the Sort Details section, in the page field description of Value, a Note is added. • In the Contacts tab field descriptions topic, more information about the Contacts tab is added. • In the POM Health Monitor page field descriptions, in the POM System Limits section, information about the Total Number of Callbacks header is added. • In the Global Configurations page field descriptions topic, in the Campaign Settings section, information about Allow Sorting By Phone Attribute option is added. • In the New / Edit Rule page field descriptions topic, in the Nuisance Frequency section, information about the Same Calendar Day option is added. • In the Contact Attributes chapter, in the Overview topic, in the list in Table 1: System attributes with the system-generated values, information about a new system attribute (<code>addedOn</code>) is added. • In the New Data Source first page field descriptions topic, for the Check phone numbers/E-Mails for DNC option, a Note is added. • In the Uploading contacts topic, for the Check phone numbers/E-Mails for DNC option, a Note is added. • In the Upload Contacts page field descriptions topic, for the Check phone numbers/E-Mails for DNC option, a Note is added. • In the Roles and privileges topic, in the Contact List section, information about the Exclude Contacts role is added. • In the Excluding contacts from a contact list topic, information is added about the Exclude for Days field. • In the Excluded Contacts page field descriptions topic, information is added about the Exclude Until field. • In the Add Excluded Contacts page field descriptions topic, information is added about the Exclude for Days field.

Table continues...

Issue	Date	Summary of changes
		• In the New / Edit Campaign page field descriptions topic, information about User Contact ID and Customer ID is added and more information about Filter Template is added. • In the New Contact List page: Details tab field descriptions topic, an option to select an attribute for DNC is added. • In the Add Address/User Contact ID/Customer ID To DNC List page field descriptions, information about DNC for Days, User Contact ID, and Customer ID is added. • In the Add Multiple DNC Addresses/User Contact IDs/ Customer IDs page field descriptions, information about DNC for Days, User Contact ID, and Customer ID is added. • In the DNC List Details page field descriptions topic, information about ID Type and the DNC Until column is added. • In the New Data Source second page (for file import) field descriptions topic, for the Local File Import, SFTP File Import, and the Browse File options, information is added about the record format of a DNC address in a file. The file uploads to the POM server. • In the Uploading contacts topic, for the Exclude Contacts option, information is added about the record format of a DNC address in a file. The file uploads to the POM server. • In the Add DNC data source page field descriptions topic, for the Upload Addresses From Following File option, information is added about the record format of a DNC address in a file. The file uploads to the POM server. • In the DNC Registered Contact Details page field descriptions topic, information about ID Type and the DNC Until column is added. • In the Campaign strategy node topics, in the Call, SMS, Mail, Custom action node, Address sections, in the page field description of Min Contact Time, a note updated. • In the Campaign Manager page field descriptions topic, information about the Stop option and Organization column is added. The following topic is added: • Stopping a campaign

Table continues...

Issue	Date	Summary of changes
Release 4.0.2 SP2, Issue 1.2	October 2023	The following information is updated: • In the New / Edit Campaign page field descriptions topic, information about Time Zone Phone Attributes, User Preferred Time, Timezone of Zipcode is added. • In the New / Edit Rule page field descriptions topic, in the description of Add Condition, a URL is added to navigate a user to the Supported formats of day, date, and time for databases in Attribute and System Restrictions page. • In the Supported formats of day, date, and time for databases in Attribute and System Restrictions topic, while defining rule conditions, a new example of using the special keyword, \$TODAY with DATE or TIMESTAMP datatypes is added. • In the Supported formats of day, date, and time for databases in Attribute and System Restrictions topic, in the Support for special keywords in Rule query editor section, a new keyword for the TIMESTAMP datatype is added. • In the Edit Callback page field descriptions topic, a Note is added. • In the Contact Lists page field descriptions topic, an option to upload contacts into a contact list is added. • In the Data Source tab field descriptions topic, in the Actions row, a Note is added about available action items for the data sources created with Upload File option. • In the POM Home overview topic, information about System Notifications widget is added. • In the POM Home page field descriptions topic, in the Columns row, information about System Notifications widget is added. • In the POM Health Monitor page field descriptions, information about POM System Limits is added. • In the Roles and privileges topic, in the Contacts table, section, in the Contact List section, information about the Export Contacts role is added. • In the Agent Scripts topic, information about enhanced security is added. The following topics are added: • Exporting Contacts from a Contact List. • Export Contacts dialog box field descriptions. • Exporting Contacts from a database.

Table continues...

Issue	Date	Summary of changes
		• Export Contacts page field descriptions • Contact Lists page field descriptions • Attribute Selection page field descriptions • Overview of SIP codes • Adding a SIP code to completion code mapping • Modify a SIP code to completion code mapping • Delete a SIP code to completion code mapping • SIP code to Completion Code page field descriptions
Release 4.0.2 SP1, Issue 1.1	March 2023	• Updated the description of the <code>Next State After</code> property in the Result node topic. • Added an example of using the special keyword, <code>\$TODAY</code> with <code>TIME</code> or <code>TIMESTAMP</code> datatypes while defining rule conditions. • Updated the topic Supervisor Configuration page field descriptions.

Table continues...

Issue	Date	Summary of changes
Release 4.0.2, Issue 1.0	October 2022	Added the following information: • Advanced guard time with follow-the-sun dialing. • Change pacing type of a Call task node in real time. • Enable or disable Silence Call Detection for Call task nodes with Custom, None, Skill Based, and Time Based pacing types. • SFTP configuration section under Managing configurations. • Sorting option description in the New in this release section. • Exporting completion codes to the campaign export .csv file. • Procedure for accessing the Audit Log Viewer. • Unmask Contact Attributes role description in the Managing users section. • Added the following procedures in the Managing users section: - Modifying users - Deleting users • Added the following sections in the Contact lists section: - The Allow bulk import feature description. - Procedure for viewing a contact data source information. • Added the following sections in the Contact Attribute section: - New predefined phone and zip code type of attributes. - Procedure for generating CSV templates for attributes. - Separate tables for system attributes with system-generated values and user-defined values. • Added the following sections in the DNC Lists section: - The recommended path for uploading DNC local files. - The DNC preview splitter status list. • In the Managing Agents section, added an example of a CSV file for importing agents. Updated the following information: • Date and time formats in the Date and time formats for databases in filter templates topic.

Table continues...

Issue	Date	Summary of changes
		• Supported time zone after enabling the advanced guard time topic. • Navigation information in topics according to the new GUI. • List of associated attributes that are added with a phone attribute in the Contact Attribute section.

Chapter 2: Proactive Outreach Manager

Proactive Outreach Manager overview

Proactive Outreach Manager (POM) provides outbound campaign management capability for voice, email, SMS, and custom channels.

POM contains the following modules:

- **Manager:** Use this module to create and manage agent-assisted or automated outbound campaigns. You can associate contact lists, containing contact information of your customers, with the campaigns. You can then run the campaigns to communicate with your customers.

For example, a bank can create and run an outbound campaign to provide information about the upgraded banking services to its customers.

- **Dashboard:** Use this module to access Supervisor Dashboard and perform real-time monitoring of the active campaigns.

You can monitor campaign-related resources and activities, such as, staffed agents, active contact data and Do-Not-Call (DNC) information import jobs. You can also view the inbound skills and license summary information.

The modules that are available to you depend on the role that is assigned to your user account.

New in this release

New features and enhancements in the Avaya Proactive Outreach Manager Release 4.1

Load Monitoring Service

A new Load Monitoring service is introduced to monitor the load of the POM system. When the load exceeds the defined threshold, restrictions are imposed on the execution of some of the heavy operations of the system, such as imports, reports, and purges. This guards POM from breaking, and it also reduces the impact on POM especially during production.

System alarms are raised to notify the user about the load situation for timely remediation.

Dynamic guardrails

Dynamic guardrails are introduced in this release to protect POM from any failure, ensuring smooth operations during production. When the POM system is under heavy load, POM imposes

guardrails on the operations that are resource intensive. As the POM system load reduces, the restrictions are removed.

guardrails are applied to the following POM operations:

- Contact list imports and uploads: Simultaneous running of multiple imports or uploads of contact lists is restricted. The count of contact list imports or uploads that can run in parallel varies based on the amount of load on the POM system. The higher the load, the higher the restriction and the lesser the number of imports and uploads that are allowed to run simultaneously.
- Count of records for import and uploads: The count of records allowed for imports or uploads varies based on the load of the POM system. The higher the load, the higher the restriction, and the lesser the number of imports and uploads allowed.
- POM reports: All the POM reports are disabled if the POM system is under high load.
- Purge schedule: The current iteration of the scheduled purge is skipped when POM system is under high load.

System Restrictions Widget on POM Home Page

A new System Restrictions widget is introduced that displays the restrictions that are imposed based on the POM system load. This is a smart widget on the POM Home page, which is displayed when the current system load of POM exceeds the predefined threshold.

Smart Notification Widget Enhancement

The Smart Notification widget is enhanced to introduce the alert for purge operations. A notification is displayed if the last scheduled purge did not complete.

Records filtering improvement

Filtering of records is improved and is faster than before. If the **pause dialing during contact selection** option is selected, the filtration speed is the highest.

Database Reindexing

A POM admin or POM super admin can rebuild POM database indexes. Indexes are required to be rebuilt periodically according to the Avaya recommended ideal frequency. Database reindexing improves the overall performance of POM.

Reindexing is best performed during maintenance hours and should never be done during business hours to ensure the POM system stability.

Removal of POM Cache and POM Monitor

The POM Monitor and POM Cache Service have been deprecated and are no longer available to use from this release.

Related links

[New features and enhancements in the earlier releases](#) on page 25

New features and enhancements in the earlier releases

New features and enhancements in the Avaya Proactive Outreach Manager Release 4.0.2 service pack 4

Agent preferred campaigns

With this enhancement, agents will have an option to select one or more preferred campaigns. New Agent APIs allow agents to select and view their preferred campaigns. POM attach the agent to one of their preferred campaigns based on the existing agent assignment logic. New REST APIs are provided for the supervisor to view and change the agent's preferred campaigns. This provides greater control to the supervisors for configuring the agents to join specific campaigns. Supervisor Dashboard provides a real-time view to the supervisors to see the preferred campaigns of the agents. Supervisors can also add/change the preferred campaigns of the agents in real-time from Supervisor Dashboard without restarting any service.

New API to get Contacts

New API to get contacts is provided with this release. This new API is highly efficient, has better response time and is optimized to put less load on DB even for frequent executions. It is highly recommended to use this new API instead of the older one.

Efficient Contacts and Exclude Contacts tabs in User Interface

With this release, the Contacts tab and the Exclude Contacts tabs in Contact Lists user interface are enhanced to load the contacts faster, which improves the user experience.

User Experience Enhancements

The following user interface pages are upgraded to provide a better user experience:

- Agent Attributes
- Agent Address Book
- Agent Group Configuration
- Agent Configuration

New features and enhancements in the Avaya Proactive Outreach Manager Release 4.0.2 service pack 3

Option to make phone attributes available for sorting on the filter template page

POM 4.0.2 SP3, provides a new option/setting/check box (**Allow Sorting By Phone Attribute**) in Campaign settings.

If you enable this option, POM makes the Phone attributes of a filter template available for sorting on the filter template page. The changes to the **Allow Sorting By Phone Attribute** check box do not impact an existing filter template that has phone attributes.

If you clear the **Allow Sorting By Phone Attribute** check box, the Phone attributes do not appear on the Value drop-down menu.

Option to count nuisance call attempts on the same calendar day

POM 4.0.2 SP3 provides a new option (Same Calendar Day) in the Rule Category in the Nuisance Frequency area.

If you enable this option, the rule engine counts the nuisance call attempts for the same calendar day till midnight of the contact's time zone.

Option to customize the display of contact attributes of a contact list

In POM 4.0.2 SP3, if you select a particular contact list, the Contacts tab has a new icon  to customize the display (show/hide) of the contact attributes of that contact list.

Option to customize the display of the Organization column on Campaign Manager page

In POM 4.0.2 SP3, the Campaign Manager page has a new icon . A non-org user can use the icon to enable POM to customize the display (show/hide) the **Organization** column.

Enhancement to POM Health Monitor page that displays adherence to POM System Limits

POM Health Monitor page displays the **POM System Limits** tab.

Earlier to POM 4.0.2 SP3, the **POM System Limits** tab displayed the supported limits for:

- Total number of Contacts per contact list
- Total number of Contacts per campaign
- Total number of Contacts in the POM database
- Total number of records in the Contact Attempts History table

In POM 4.0.2 SP3, the **POM System Limits** tab also displays the supported limits for:

- The total number of campaigns that exceeds the supported system limit or the threshold percentage for callbacks.
- The total number of callbacks in the POM database that exceeds the supported system limit or the threshold percentage.
- The total number of organizations that exceeds the supported system limit or the threshold percentage for callbacks.

POM System Limits page also displays the system adherence to the supported limits for these categories.

Enhancement to Smart Notification Widget on POM Home Page

Earlier to POM 4.0.2 SP3, the POM Home page displayed the System Notifications widget only when POM detected that the supported system limits or the threshold for system limits were exceeded.

In POM 4.0.2 SP3, the POM Home page also displays the System Notifications widget when POM detects that the logged in user has the permission to access the POM Health Monitor.

New system attribute to calculate age of contacts

POM now provides a new system attribute (`addedOn`) that displays the time when a new contact was imported, uploaded, or added into a contact list. This attribute is a part of all contact lists for all organizations. With this attribute, a user can filter contacts based on their age.

Timed DNC

POM provides an option to a user to specify the number of days for which an address remains in a DNC list.

Enhanced DNC

Currently, the DNC feature in POM works only on address (Phone number, Email, or SIP number), that is if one address of a customer is in a DNC list, then the POM dialer can reach to the same customer on the other address.

However, if a customer does not want to receive any call on any of their addresses, the entire customer record needs to be in the DNC list.

With the Enhanced DNC feature, POM can restrict the entire customer record based on the customer ID or by user contact ID.

Quick stop functionality for campaigns

With this feature, a user can stop a campaign that is in the running state.

Timed Exclusion

As an extension of the Excluded Contacts feature, POM now provides a functionality to exclude the contacts from a contact list for a certain number of days.

New features and enhancements in the Avaya Proactive Outreach Manager Release 4.0.2 service pack 2:

Sip Code to Completion Code Mapping

When POM receives a telephony event through MPP or EP, the telephony event contains a SIP code or event. This sip code or event is mapped to a system completion code, which is then used to dispose the record.

With this feature, a user can change this default mapping and map a custom completion code to a sip code or event. The mapped completion code is then used to dispose the record.

New category of completion codes for SIP Codes

The SIP Code to completion code mapping is a system-wide/global configuration, and hence common for all organizations. This new SIP type of completion code is required to be created only for mapping with SIP codes.

Only an administrator user can see, add, edit, or delete SIP type of completion codes.

Enhanced Rules to reduce evaluation of number of rules

Enhanced rules to use the current number that POM dials regardless of the phone attribute it is a part of.

With this option, you can:

- Avoid the need to create multiple rules for multiple phone or call attributes.
- Improve operating performance by reducing the number of rules that POM evaluates at the time of dialing.

This is the default option for all new rules.

Separate database for POM Reports

By default, POM retrieves reports from the database to which POM is currently connected.

With this feature, POM retrieves reports from a replicated database. This reduces the load on the primary database, since POM can fetch reports from the replicated database.

The replicated database is of the same type as the POM database and has the same information as the POM database. The replicated database is of the same version of the POM database and has the same schema.

Delete contacts from contact list based on filter template

POM has a feature of emptying the contact list as well as deleting the records while uploading a contact list or while creating a datasource.

As an extension of this feature, users can now delete specific contacts by using a filter template. POM deletes the contacts that match the criteria in the filter template.

If the contact list is associated to a running campaign, POM deletes the contacts from the running campaign. This reduces the contacts in an ongoing infinite campaign.

Export contact list to a text file

With this feature, a user can download contacts from a contact list. POM exports the contacts to a text file, such as a `.csv` file. Users have a choice to select the attributes to export and also have an option to specify a delimiter of their choice.

Users also have a choice to export from a different database which is of the same version, type as the database to which POM is currently connected, and also has the same schema.

Enhanced Security for Agent Scripts

User has an option to enable enhanced security for Native Agent Scripts on the Global Configurations page.

Enhanced Health Monitor that displays adherence to POM System Limits

POM Health Monitor page now displays the **POM System Limits** tab.

The POM System Limits tab displays the supported limits for:

- Total number of Contacts per contact list
- Total number of Contacts per campaign
- Total number of Contacts in the POM database
- Total number of records in the Contact Attempts History table

POM System Limits page also displays system adherence to the supported limits for the above mentioned categories.

Smart Notification Widget on POM Home Page

The POM Home page displays the **System Notifications** widget only when POM detects that the supported system limits or the threshold for system limits are exceeded. This new widget is not displayed when the system is within the supported limits for specific categories. With this feature, a user can ensure that the system is well under the supported limits for specific categories before it starts impacting production.

New features and enhancements in the Avaya Proactive Outreach Manager Release 4.0.2 service pack 1

Quick upload functionality for Contact Lists

With the quick upload functionality, users will be able to upload contacts into a contact list using a `.csv` file directly from the Contact Lists page without creating a datasource.

Support \$TODAY for timestamp type of attribute in Rule Engine

While creating a rule, users will be able to provide \$TODAY as a value for all timestamp type of attributes.

Capability to manage agents in real-time without Supervisor role

Supervisor role was mandatory to manage agents in real-time through Monitor or Supervisor Dashboard. The operations include View active agents, release from outbound, move to job, place agent on break, force logoff. Users with one or more of these individual roles will now be able to manage agents in real-time through Monitor or Supervisor Dashboard, without requiring Supervisor Role.

New features and enhancements in the Avaya Proactive Outreach Manager Release 4.0.2

Advanced guard time with follow-the-sun dialing

In this release, POM picks up a record for dialing from the operational database only when the guard time of at least one of these phone attributes is open for dialing. With this, the number of records getting restricted, if the guard times are not open, reduces significantly. Additionally, follow-the-sun dialing can now be achieved by sorting with phone's time-zone attribute in the Filter Template.

You can specify phone attributes in the **Time Zone Phone Attributes** field on the Campaign Creation page to configure the follow-the-sun dialing feature.

In addition, you can also enable the following on the Campaign Creation page:

- **User Preferred Time:** To use the values from the Phone Allowed Time and Phone Disallowed Time attributes of a phone attribute for determining the guard time of the phone attribute.
- **Timezone of Zipcode:** To use the zip code-based guard time of a record for determining the guard time of each phone attribute.

If you enable the **User Preferred Time** and **Timezone of Zipcode** options, POM determines the intersecting time between the guard time of a phone attribute, user preferred time, and zip code-based guard time as the final guard time for the phone attribute.

To pick up those phone attributes for dialing first whose time zone closes first, you can configure a sort condition for the `<Phone attribute name> Time Zone` attribute in the filter template that is associated with the contact lists of the campaign and specify the sort order as Descending.

Time zone for Zip-code and Zip-State

Additional attributes to specify two Zip-codes, two Zip-States, and their corresponding Time-zones with each record are now available with this release. Guard time specified for a country and state is then applied for the records which has that country value in Country Predefined attribute, and state in Zip-state attributes.

If you create a custom attribute of type phone, POM automatically creates the Allowed Time and Disallowed Time attribute for the phone attribute.

The following predefined zip code type of attributes are introduced:

- Zipcode Time Zone Predefined
- Zipcode State Predefined

- Zipcode1 Predefined
- Zipcode1 Time Zone Predefined
- Zipcode1 State Predefined

Dialing based on User Preferences

This release provides additional child attributes for each phone type of attribute to provide user's preference of allowed time to call as well as disallowed time to call.

The following new predefined phone and zip code type of attributes are introduced:

- Phone 1 Allowed Time
- Phone 1 DisallowedTime
- Phone 2 Allowed Time
- Phone 2 DisallowedTime

System Health Monitor

A user can see information about the System resource consumption, such as CPU, memory, database connections on the System Health Monitor.

Time based finish criteria for Campaign

POM now supports Abort At feature for time-based finish criteria. Users can now provide Date and Time at which the job should be aborted. Date is optional, but time field is mandatory. Users can also set this criteria for a running campaign from POM Dashboard.

Sorting option for the items in a column

For all the pages in POM, you can click a column to sort the items in the column.

Note:

On the File Splitters page, the column sorting feature is disabled for the **Unfiltered Records File Path** column.

Bulk Import option for Automatic File Import

POM now supports bulk import for Automatic File Import into POM contact list. Users can now select this option and provide a file name. POM will use this file name as a prefix and will search all files matching the pattern FILENAME[0-9]*. All files matching this pattern will be imported using the single Automatic File Import data source. For example, if a user provides the file name as CreditContactList.csv, then users could copy file with name CreditContactList1.csv, CreditContactList2.csv, CreditContactList302.csv and so on. POM will import contacts from all these files using the same data source.

When you create a contact data source for automatic file import, you can enable the **Allow Bulk Import** option to import multiple local files simultaneously. The file names must be the same containing incremental numbering. You can also exclude multiple contact files simultaneously with this feature.

Change pacing type of a Call task node in real time

You can set the **Runtime Change Pacing Type** property of a Call task node to ON so that an authorized user can change the pacing type of the Call task node from the Supervisor Dashboard in real time.

You can change the pacing type only between Preview, Progressive, Cruise Control, and Expert Call Ratio in real time.

Campaign Export

The account administrator will be able to download campaign export files on their local machine. Campaign export files can also be copied to customer's SFTP location, if the SFTP server is configured.

System Completion Code Name in export data

System Completion Code Name can be included in export data. This can be enabled/disabled through a configuration. By default it is enabled.

SFTP configuration

On the Configurations tab, you can use the **SFTP Configuration** option to configure SFTP servers in POM.

You can then associate an SFTP server with a campaign. POM exports the data of successfully attempted contacts along with the completion codes and other related details to the SFTP server after the campaign completes.

Configure Silence Call Detection for agentless voice campaigns

You can configure Silence Call Detection for Call task nodes with Custom, None, Skill Based, and Time Based pacing types.

Enhancements in User Experience

The following pages provide an enhanced user experience:

- Home Page
- Campaign Manager
- Contact List
- Filter Templates
- Completion Codes
- Campaign Attributes
- Contact Attributes
- Rule Editor
- File Splitter
- Purge Schedule
- Holiday
- Global Configuration

Common enhancements in User Experience

- All table actions column icons are moved under 3 dot action menus.
- Long forms are divided into multiple sections and its easy to navigate between the sections with tabs/bookmarks. The Form errors highlighted for each section in tabs with an error icon. They are implemented in CCW and global configurations.

- A user can add multiple campaign/contact attributes at once.
- A user can view and perform small actions on same page instead of navigating to other page. Options such as Save as campaign, Associate organizations, Strategy summary are provided.

Related links

[New in this release](#) on page 23

Logging on to Proactive Outreach Manager

Procedure

1. In a web browser, type the following URL:
https://<IP address of the primary POM server>
The Avaya Experience Portal sign-in page is displayed.
2. In the **User Name** field, type your user name.
3. In the **Password** field, type your password.
4. Click **Logon**.
The Home page of Avaya Experience Portal is displayed.
5. In the navigation pane, click **Proactive Outreach > Manager**.

Result

The Home page of Proactive Outreach Manager is displayed.

POM Home overview

The Experience Portal web console displays the POM Home page. The POM Home page provides options to customize the view of the page. Each view displays specific information.

For example, the Campaigns view displays information about the campaigns that are scheduled, started, and completed.

By default, the POM Home page displays information through the following views:

- Favorites
- Campaigns
- Contacts List
- Agents
- System Notifications

POM displays this widget when:

- POM detects that the system limits or the threshold for system limits have exceeded. For more information, [System Notifications widget](#) on page 36.
- The logged in user has permission to access POM Health monitor. For more information on roles and access permission, see [Roles and privileges](#) on page 46.

You can turn on or turn off the display of the Favorites, Campaigns, Contacts List, and Agents views.

 Note:

You can customize the views based on the user role and the privileges assigned for campaigns, contact lists, agent monitor view, and favorite links. The POM Home page restricts the organization-level data circulation for campaigns and contact list counts. You might need to refresh the POM Home page to view the complete information.

For Internet Explorer 11.0, to add the web URL of the primary POM server, open a Microsoft Edge web browser, then enable the Internet Explorer mode, and then use the **Compatibility View Settings** option to add the web URL of the primary POM server.

Customizing POM Home page

About this task

Use this procedure to customize the POM Home page views and user-interface elements.

You cannot customize the System Notifications view.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.

The POM Home page is displayed.

2. To customize user views, click  and in the Customize Users View dialog box, do the following:
 - a. From the **Select Views** list, select from the following options as required:
 - **Campaigns**
 - **Contact List**
 - **Agents**
 - **Favorites**
 - b. In **Auto Refresh Rate (In seconds)**, specify the value as required.

3. To customize the Favorites column view, in the Favorites column, click  and do the following:
 - In the Favorites dialog box, from **Favorite List**, enable the options as required, and click **Save**.
4. To customize the Campaigns column view, in the Campaigns column, click  and do the following:
 - a. In the Customize Campaign List View dialog box, enable the options from the **Item** list as required.
 - b. To add a new option to the list, click **Add New Item**, add relevant information in the Add New Item dialog box, and click **Add**.
 - c. To delete an item from the list, select the item and click , and in the Delete dialog box, click **Delete**.
 - d. Click **Save**.
5. To customize the Contact List column view, in the Contact List column, click  and do the following:
 - a. In Customize Contact List View dialog box, enable the options from the **Item** list as required.
 - b. To add a new option to the list, click **Add New Item**, add relevant information in the Add New Item dialog box, and click **Add**.
 - c. To delete an item from the list, select the item and click , and in the Delete dialog box, click **Delete**.
 - d. Click **Save**.
6. To customize the Agents column view, in the Agents column, click  and do the following:
 - a. In the Customize Agents View dialog box, enable the options from the **Item** list as required.
 - b. To add a new option to the list, click **Add New Item** and add relevant information in the Add New Item dialog box, and click **Add**.
 - c. To delete an item from the list, select the item and click , and in the Delete dialog box, click **Delete**.
 - d. Click **Save**.

Related links

[POM Home page field descriptions](#) on page 35

POM Home page field descriptions

POM Home page

Use this page to display columns such as Campaigns, Contact List, Agents, and Favorites used to display specific statistics. You can also use this page to customize the POM Home page.

Field or Button	Description
Last Poll	Displays the date and time when the page is last refreshed.
	Use to refresh the POM Home page.
	Use to go to the Customize Users View dialog box to customize the POM Home page.
Columns	Displays the following columns on the POM Home page to view specific statistics: • Campaigns • Contact List • Agents • Favorites • System Notifications For users who have permission to access Health monitor, POM displays this widget when the system limits or the threshold for system limits are exceeded. For more information, see System Notifications widget on page 36.

POM displays the Customize Users View dialog box to customize the POM Home page when you click . Use this dialog box to select the required views, set the auto-refresh rate, and change the positions of the columns on the page.

Field or Button	Description
Select Views	Use to select the following columns to view specific statistics and links on the POM Home page: • Campaigns • Contact List • Agents • Favorites

Table continues...

Field or Button	Description
Auto Refresh Rate (In seconds)	Use to set the auto-refresh rate for the page. The default value is 60. The minimum value is 10. The Experience Portal web console refreshes the POM Home page based on this value. When you log in to the Experience Portal web console for the first time, the POM Home page displays the agent details as 0. The POM Home page displays the agent details after the first polling interval.
Save	Use to save the changes.
Cancel	Use to cancel the changes and return to the POM Home page.

Favorites column

Use this column to view and customize your favorite page links. You can click the links to navigate to the corresponding pages.

Field or Button	Description
	Use to go to the Favorites dialog box to customize the Favorites column.
Favorite list	Use this list to select the following items displayed in the Favorites column: • Agent Address Book • Contact Lists • DNC Lists • Completion Codes • POM Settings • POM Manager • Global Phone Number Reject Patterns
Actions	• Hide / Show - Use to show or hide an item from the Favorites column. •  - Use to arrange the items in the Favorite List.
Save	Use to save the changes.
Cancel	Use to cancel the changes and return to the POM Home page.

System Notifications widget

POM displays this widget when POM detects that the supported system limits or the threshold for system limits are exceeded or when the purge was not executed.

In this widget, POM provides information about one or more of the following scenarios:

- The total number of the contact lists in which the number of contacts exceeds the supported system limit.
- The total number of the contact lists in which the number of contacts exceeds the threshold percentage.
- A campaign for which the total number of contacts across all the contact lists configured for the campaign (without applying filter criteria) exceeds the supported system limit of number

of contacts in a campaign, is also considered as exceeding supported system limits. Total number of all such campaigns is displayed.

- A campaign for which the total number of contacts across all the contact lists configured for the campaign (without applying filter criteria) exceeds the threshold percentage of number of contacts in a campaign, is also considered as exceeding threshold percentage. Total number of all such campaigns is displayed.
- The total number of contacts in the POM database that exceeds the supported system limit.
- The total number of contacts in the POM database that exceeds the threshold percentage.
- The total count of records in the `contact_attempts_history` table in the POM database that exceeds the supported system limit.
- The total number of records in the `contact_attempts_history` table in the POM database that exceeds the threshold percentage.
- The total number of campaigns that exceeds the supported system limit for callbacks.
- The total number of campaigns that exceeds the threshold percentage for callbacks.
- The total number of callbacks in the POM database that exceeds the supported system limit.
- The total number of callbacks in the POM database that exceeds the threshold percentage.
- The total number of organizations that exceeds the supported system limit for callbacks.
- The total number of organizations that exceeds the threshold percentage for callbacks.
- Displays a purge notification if the last purge schedule was not executed.

For more information, the **System Notifications** widget displays an option to navigate to the **POM System Limits** tab on the POM Health Monitor page.

Field or Button	Description
::	Drag to change the position of the column.
More details	Click to navigate to the POM System Limits tab on POM Health Monitor to see more information about the campaigns, contacts, contact lists, and records that exceed the system limit.

System Restrictions widget

The system restrictions widget displays information about restrictions based on the current system load. This widget is displayed only when the current system load exceeds the pre-defined threshold limit.

In this widget, POM provides information about the following applied restrictions:

- Maximum x parallel imports are allowed.
- Imports with the maximum of x records per import are allowed.
- Reports are temporarily blocked.

The value of x is calculated depending on the current load of the POM system. For more information about the parameters considered to determine the POM system load, see the *System Load* section in the [POM Health Monitor page field descriptions](#) on page 553.

For more information, the **System Restrictions** widget displays an option to navigate to the **System Load** tab on the POM Health Monitor page.

Field or Button	Description
⋮	Drag to change the position of the column.
More details	Click to navigate to the System Load tab on POM Health Monitor to see more information about the system load.

When POM detects that the current system load exceeds the pre-defined threshold limit, POM applies restrictions on parallel imports, large imports, and reports, and the system restrictions window then opens and provides information about the restrictions.

POM applies restrictions for the smooth running of the POM system and avoiding breakdowns during production.

The system restrictions window is displayed only once during each user session, either when the user visits the POM Home page or the POM Health Monitor page.

Campaigns column

This column displays different campaign statistics. To customize a Campaigns column view, you can add a label name and select the campaign state and date. The Campaigns column displays statistics using a pie chart and list with the count and label.

Field or Button	Description
⋮	Drag to change the position of the column.
	Use to go to Customize Campaign List View dialog box to customize the Campaigns column.

Table continues...

Field or Button	Description
Add New Item	Use to add items in the Item list. Specify the following in the Add New Item dialog box: • Item Name: Use to specify a name for the item. • State: Use to select the state of the campaign. The available options are: - Running - Paused - Completed - Scheduled • Duration: Use to select the period to display the campaign records. - Between: Select the Start Date and End Date using the calendar wizard.  Note: The End Date must be after the Start Date. - Predefined Values: Select from the following values as required: • All • Today • Yesterday • Tomorrow • This Week • Next Week • Last Week • This Month • Next Month • Last Month
Item	Use this list to select the items to display in the Campaigns column. The list displays the items that you add using Add New Item.  Note: The Campaigns column can display a maximum of five items.

Table continues...

Field or Button	Description
Actions	• Hide / Show - Use to show or hide an item from the Campaigns column. •  - Use to delete an item from the Campaigns column. •  - Use to display more options such as Delete.  Note: POM displays  when you point the mouse over an Item list area.
Save	Use to save the changes.
Cancel	Use to cancel the changes and return to the POM Home page.

Contact List column

This column displays different contact list statistics. To customize a Contact List column view, you can add a label name and select the contact list state and date. The Contact List column displays statistics using a pie chart and list with the count and label.

Field or Button	Description
	Drag to change the position of the column.
	Use to go to Customize Contact List View dialog box to customize the Contact List column.

Table continues...

Field or Button	Description
Add New Item	Use to add items in the Item list. Specify the following in the Add New Item dialog box: • Item Name: Use to specify a name for the item. • State: Use to select the state of the contact list. The available options are: - Running - Paused - Completed - Scheduled • Duration: Use to select the period to display the contact list records. - Between: Select the Start Date and End Date using the calendar wizard.  Note: The End Date must be after the Start Date. - Predefined Values: Select from the following values as required: • All • Today • Yesterday • Tomorrow • This Week • Next Week • Last Week • This Month • Next Month • Last Month
Item	Use this list to select the items to display in the Contact List column. The list displays the items that you add using Add New Item.  Note: The Contact List column can display a maximum of five items.

Table continues...

Field or Button	Description
Actions	• Hide / Show - Use to show or hide an item from the Contact List column. •  - Use to delete an item from the Contact List column. •  - Use to display more options such as Delete.  Note: POM displays  when you point the mouse over an Item list area.
Save	Use to save the changes.
Cancel	Use to cancel the changes and return to the POM Home page.

Agents column

This column displays different agent statistics. The Agents column displays statistics using a pie chart and lists with the count and label. To customize the Agents column view, you can add a label name and select the agent and the agent state. The Agents column displays statistics using a pie chart and list with the count and label.

Field or Button	Description
	Drag to change the position of the column.
	Use to go to Customize Agents View dialog box to customize the Agents column.
Add New Item	Use to add items in the Item list. Specify the following in the Add New Item dialog box: • Item Name: Use to specify a name for the item. • State: Use to select the state of the agent. The available options are: - Ready - Busy - After Call Work - Not Ready  Note: The Not Ready state on the POM Home page also includes the Pending Not Ready agents. • Select Agents: Use to select the following: - Id- Agent ID. - Ext- Agent extension number. You must first select the Id or Ext option and then select the corresponding value.

Table continues...

Field or Button	Description
Item	Use this list to select the items to display in the Agents column. The list displays the items that you add using Add New Item.  Note: • The Agent Details item is added by default. You cannot delete this item. • If the agent count exceeds 800 agents assuming the agent ID is an eight-characters long, POM disables the link on the count (number). After the number of agents decreases, POM automatically enables the link.
Actions	• Hide/Show - Use to show or hide an item from the Agents column. •  - Use to delete an item from the Agents column. •  - Use to display more options such as Delete.  Note: POM displays  when you point the mouse over an Item list area.
Save	The button to save the changes.
Cancel	Use to cancel the changes and return to the POM Home page.

Related links

[Customizing POM Home page](#) on page 33

Supported languages

Avaya Proactive Outreach Manager user interface is available in the following G14 languages:

- English
- Chinese, Simplified
- Spanish
- French, Parisian
- German
- Italian
- Japanese
- Korean
- Portuguese, Brazilian
- Russian

POM Reports

You can generate POM reports through the Experience Portal web console.

You can generate standard reports and custom reports. You can also schedule reports to be generated later.

Reports do not work when POM is on high load. When POM is on high load and you run reports, the following errors occur:

- For standard and custom reports, reports do not run, and POM displays the following **message**: POM is currently on high load and cannot run reports. Please wait a few minutes and try again.
- For schedule reports, reports are generated with no data, instead it contains the following **message**: POM is currently on high load and cannot run reports. Please wait a few minutes and try again.

 Note:

If you use a separate database for reports, reports can run normally even if POM is running on high load.

For more information about reports, see *Using Avaya Proactive Outreach Manager Reports*.

Chapter 3: Managing Users

User Management overview

The Experience Portal web console displays the Roles page in the User Management tab. On the Roles page, you can add the roles specific to Avaya Proactive Outreach Manager (POM) and change or delete a custom role. You can use the Experience Portal Management System (EPM) interface to add, change, and delete user accounts. You can assign various roles and privileges to different users and specify the security options for all users. EPM can optionally gain access to the user accounts in your corporate directory, with the parameters you configure from the Lightweight Directory Access Protocol (LDAP) settings. For more information about EPM, see *Administering Avaya Experience Portal*.

On the Roles page, you can view the following POM-specific roles:

- **POM Administration:** User accounts with POM Administration access can administer the functioning of POM through Experience Portal.
- **POM Campaign Manager:** User accounts with POM Campaign Manager access can manage the different campaigns created. With this user role, you can create, edit, and delete campaigns in POM.
- **POM Supervisor:** By default, a user with a supervisor role has access to Supervisor Dashboard. The supervisors can see and manage only the agents that are assigned to them if you enable the **Agent and supervisor configuration** on the Global Configurations page. The supervisors can also see and manage the campaigns of the organization to which they belong if multitenancy Organizations is enabled on Experience Portal.
- **POM Contact Attributes Unmask:** A user with this role can unmask contact attributes.

For information about the fields on the Roles page, see *Avaya Experience Portal Documentation library* or use the context sensitive **Help** button at the top-right corner of the screen.

 Note:

Org POM Campaign Manager and Org POM Supervisor roles are visible only if you enable multitenancy.

 Important:

If you have a global administration role, ensure that you do not make changes to any other elements such as campaigns, contact lists, campaign strategies, and agent scripts that belong to an organization.

! Important:

As POM uses the name default for its internal usage, an administrator should not create an organization in the Experience Portal with the name default.

Roles and privileges

Campaigns

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
Campaign Manager					
Add Campaign	No	Yes	Yes	No	No
Change Campaign	No	Yes	Yes	No	No
Delete Campaign	No	Yes	Yes	No	No
Run Now	No	Yes	Yes	No	No
Create Campaign Schedule	No	Yes	Yes	No	No
Pause Campaign Schedule	No	Yes	Yes	No	No
Resume Campaign Schedule	No	Yes	Yes	No	No
Delete Campaign Schedule	No	Yes	Yes	No	No
WFO Recording	No	Yes	Yes	No	No
Campaign Strategy					
Add Campaign Strategy	No	Yes	Yes	No	No
Change Campaign Strategy	No	Yes	Yes	No	No
Delete Campaign Strategy	No	Yes	Yes	No	No

Table continues...

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
Campaign Restrictions					
This privilege is obsolete. You can configure campaign restrictions by using the Attribute and System Restrictions rule.					
Change Campaign Restriction	This privilege is obsolete.				
Campaign Attributes					
Add Campaign Attribute	No	Yes	Yes	No	No
Change Campaign Attribute	No	Yes	Yes	No	No
Delete Campaign Attribute	No	Yes	Yes	No	No
Completion Codes					
Add Custom Completion Codes	No	Yes	Yes	No	No
Change Custom Completion Codes	No	Yes	Yes	No	No
Delete Custom Completion Codes	No	Yes	Yes	No	No
Rules					
Add Campaign Rule	No	Yes	Yes	No	No
Edit Campaign Rule	No	Yes	Yes	No	No
Delete Campaign Rule	No	Yes	Yes	No	No
Callback Manager					
Delete Callback	No	Yes	Yes	No	No
Extend Callback	No	Yes	Yes	No	No
Callback Details	No	Yes	Yes	No	No

Table continues...

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
Reschedule Callback	No	Yes	Yes	No	No
Terminate Callback	No	Yes	Yes	No	No
Edit Callback	No	Yes	Yes	No	No
SipCode Event Completion Code Mappings	Yes	No	No	No	No

*** Note:**

If you create a custom role using POM Campaign Manager as the base role and assign the Add Campaign Strategy privilege to the custom role, the system automatically assigns the Change Campaign Strategy privilege. However, the system does not indicate the change on the screen.

If you assign the Change Campaign Strategy privilege to the custom role, the system does not automatically assign the Add Campaign Strategy privilege.

Contacts

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
Contact List					
Add Contact List	No	Yes	Yes	No	No
Change Contact List	No	Yes	Yes	No	No
Delete Contact List	No	Yes	Yes	No	No
Empty Contact List	No	Yes	Yes	No	No
Associate Organizations with Contact Lists	No	Yes	No	No	No
Associate Attributes with Contact Lists	No	Yes	No	No	No
Show All Contacts	No	Yes	Yes	No	No
Run Now	No	Yes	Yes	No	No

Table continues...

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
Exclude Contacts	No	Yes	Yes	No	No
Export Contacts	Yes	No	No	Yes	Yes
Contact Data Sources	No	Yes	Yes	No	No
Add Contact Data Source	No	Yes	Yes	No	No
Change Contact Data Source	No	Yes	Yes	No	No
Delete Contact Data Source	No	Yes	Yes	No	No
Schedule Contact Data Source	No	Yes	Yes	No	No
Contact Attributes					
Add Contact Attributes	No	Yes	Yes	No	No
Change Contact Attributes	No	Yes	No	No	No
Delete Contact Attributes	No	Yes	Yes	No	No
Associate Contact Attributes	No	Yes	No	No	No
Generate CSV Template	No	Yes	Yes	No	No
Unmask Contact Attributes	No	No	No	No	No

DNC

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
DNC List					
Add DNC List	No	Yes	Yes	No	No

Table continues...

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
Change DNC List	No	Yes	Yes	No	No
Delete DNC List	No	Yes	Yes	No	No
Empty DNC List	No	Yes	Yes	No	No
Show All Addresses	No	Yes	Yes	No	No
Add DNC Data Source	No	Yes	Yes	No	No
Change DNC Data Source	No	Yes	Yes	No	No
Delete DNC Data Source	No	Yes	Yes	No	No
Run Now	No	Yes	Yes	No	No
Schedule DNC Data Source	No	Yes	Yes	No	No
List DNC Addresses	No	Yes	Yes	No	No
Add DNC Addresses	No	Yes	Yes	No	No
Delete DNC Addresses	No	Yes	Yes	No	No
Search DNC Addresses	No	Yes	Yes	No	No
List DNC Groups					
Add DNC Group	No	Yes	Yes	No	No
Edit DNC Group	No	Yes	Yes	No	No
Delete DNC Group	No	Yes	Yes	No	No
DNC List To Group Assignment	No	Yes	Yes	No	No

Configurations

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
Data center configuration					
Add data center group	Yes	No	No	No	No
Edit data center group	Yes	No	No	No	No
Delete data center group	Yes	No	No	No	No
Servers					
Add POM Server	Yes	No	No	No	No
Change POM Server	Yes	No	No	No	No
Delete POM Server	Yes	No	No	No	No
Change POM Global Settings	Yes	No	No	No	No
POM Health Monitor	Yes	No	No	No	No
POM Manager	Yes	No	No	No	No
Start POM Server	Yes	No	No	No	No
Stop POM Server	Yes	No	No	No	No
Outbound Settings	Yes	No	No	No	No
Add Voice Server	Yes	No	No	No	No
Change Voice Server	Yes	No	No	No	No
Delete Voice Server	Yes	No	No	No	No
POM Zone Configuration					
Change Zone Configuration	No	No	No	No	No
POM Zone Licensing					
Change Licenses	No	No	No	No	No

Table continues...

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
Agent, CTI, CMS and CCElite					
Add Agent, CTI, CMS and CCElite	Yes	No	No	No	No
Change Agent, CTI, CMS and CCElite	Yes	No	No	No	No
Delete Agent, CTI, CMS and CCElite	Yes	No	No	No	No
Context Store Server Configuration					
Add Context Store Server	Yes	No	No	No	No
Edit Context Store Server	Yes	No	No	No	No
Delete Context Store Server	Yes	No	No	No	No
Global Configurations					
Change Global Configurations	Yes	No	No	No	No
Purge Schedules					
Change Purge Schedule	Yes	No	No	No	No
Country Specific Phone Settings					
Global Phone Reject Pattern	Yes	No	No	No	No
Add Global Phone Reject Pattern	Yes	No	No	No	No
Change Global Phone Reject Pattern	Yes	No	No	No	No
Delete Global Phone Reject Pattern	Yes	No	No	No	No
Country Setting	Yes	No	No	No	No
Add Country Setting	Yes	No	No	No	No

Table continues...

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
Change Country Setting	Yes	No	No	No	No
Delete Country Setting	Yes	No	No	No	No
Phone Reject Pattern	Yes	No	No	No	No
Add Phone Reject Pattern	Yes	No	No	No	No
Change Phone Reject Pattern	Yes	No	No	No	No
Delete Phone Reject Pattern	Yes	No	No	No	No
Time Zone Area Code Mapping	Yes	No	No	No	No
Add Time Zone Area Code Mapping	Yes	No	No	No	No
Change Time Zone Area Code Mapping	Yes	No	No	No	No
Delete Time Zone Area Code Mapping	Yes	No	No	No	No
Advanced Guard Time Configuration	Yes	Yes	Yes	No	No
Import Area Code Mapping	Yes	Yes	Yes	No	No
Area Code Import	Yes	Yes	Yes	No	No
Export Area Code Mapping	Yes	Yes	Yes	No	No
Area Code Export	Yes	Yes	Yes	No	No
Download Exported Area Code Mapping	Yes	Yes	Yes	No	No
Guard Time Configuration	Yes	Yes	Yes	No	No

Table continues...

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
Save Default Time Zone And Guard Time	Yes	Yes	Yes	No	No
Add Time Zone Mapping	Yes	Yes	Yes	No	No
Edit Time Zone Mapping	Yes	Yes	Yes	No	No
Delete Time Zone Mapping	Yes	Yes	Yes	No	No
Add State Mapping	Yes	Yes	Yes	No	No
Edit State Mapping	Yes	Yes	Yes	No	No
Delete State Mapping	Yes	Yes	Yes	No	No
Area Code Configuration	Yes	Yes	Yes	No	No
Add Area Code Mapping	Yes	Yes	Yes	No	No
Edit Area Code Mapping	Yes	Yes	Yes	No	No
Delete Area Code Mapping	Yes	Yes	Yes	No	No
Dialing Rule	Yes	No	No	No	No
Add Dialing Rule	Yes	No	No	No	No
Change Dialing Rule	Yes	No	No	No	No
Delete Dialing Rule	Yes	No	No	No	No

Agents

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
Agent Address Book					
Add Contact	No	Yes	Yes	No	No
Change Contact	No	Yes	Yes	No	No

Table continues...

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
Delete Contact	No	Yes	Yes	No	No
Agent Scripts					
Add Agent Script	No	Yes	Yes	No	No
Change Agent Script	No	Yes	Yes	No	No
Delete Agent Script	No	Yes	Yes	No	No
Agent Attributes					
Add Agent Attribute	No	Yes	Yes	No	No
Change Agent Attribute	No	Yes	Yes	No	No
Delete Agent Attribute	No	Yes	Yes	No	No
Agent Configuration					
Add Agent	No	No	No	No	No
Delete Agent	No	No	No	No	No
Import Agent	No	No	No	No	No
Agent To Organization Assignment	No	No	No	No	No
Agent Group Configuration					
Create Agent Group	No	No	No	No	No
Edit Agent Group	No	No	No	No	No
Delete Agent Group	No	No	No	No	No
Agent To Group Assignment	No	No	No	No	No

Supervisor

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
Supervisor Configuration					

Table continues...

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
Change Agent Group Assignment	No	No	No	No	No

Dashboard

Applies to Supervisor Dashboard.

For information about the role and privileges-based options that are available on the Supervisor Dashboard web interface, see [Role and privileges-based access to the Supervisor Dashboard web interface](#) on page 57.

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
Campaigns View					
Pause Campaign	No	Yes	Yes	Yes	Yes
Resume Campaign	No	Yes	Yes	Yes	Yes
Stop Campaign	No	Yes	Yes	Yes	Yes
Contacts Data Import View					
Pause Contacts Data Import	No	Yes	Yes	Yes	Yes
Resume Contacts Data Import	No	Yes	Yes	Yes	Yes
Stop Contacts Data Import	No	Yes	Yes	Yes	Yes
DNC Data Import View					
Pause DNC Data Import	No	Yes	Yes	Yes	Yes
Resume DNC Data Import	No	Yes	Yes	Yes	Yes
Stop DNC Data Import	No	Yes	Yes	Yes	Yes
View Active Agents					
Release From Outbound	No	Yes	Yes	Yes	Yes
Move To Job	No	Yes	Yes	Yes	Yes
Place on Break	No	Yes	Yes	Yes	Yes

Table continues...

Roles and privileges	POM Administration	POM Campaign Manager	Org POM Campaign Manager	POM Supervisor	Org POM Supervisor
Force Logoff	No	Yes	Yes	Yes	Yes
View License	No	Yes	Yes	Yes	Yes
View Zone Failover Settings	No	Yes	Yes	Yes	Yes
Allow Zone Failover	No	No	No	No	No
View Inbound Skills	No	Yes	Yes	Yes	Yes
Refresh Agent Skills (Allows the user to refresh the agent skills for CCElite)	Yes	No	No	Yes	Yes

POM Home Page Views

Campaign View	Yes	No	No	No	No
Contact List View	Yes	No	No	No	No
Agent View	Yes	No	No	No	No
Favorite View	Yes	No	No	No	No

Role and privileges-based access to the Supervisor Dashboard web interface

The POM Supervisor Dashboard is used for real-time monitoring of the active campaigns, staffed agents, licenses, inbound skills for Call Center Elite, data import jobs, and DNC import jobs that are configured in POM.

The options that are available on the Supervisor Dashboard web interface for a user account depend on the role and privileges that are assigned to the user account for the **Monitor** component.

For more information, see [Roles and privileges](#) on page 46.

For information about Supervisor Dashboard, see *Using Avaya Proactive Outreach Manager Supervisor Dashboard*.

The following table provides information about the role and privileges-based options that are available on the Supervisor Dashboard web interface:

Role privileges	Options available on the Supervisor Dashboard web interface
Campaign View	• System dashboard and pages available: - Active Campaigns dashboard - Active Campaigns Details page - Multiple Campaigns Details page • Displays the customization options for the Active Campaigns dashboard, Active Campaigns Details page, and Multiple Campaigns Details page on the User Preferences page. • Displays the Active Campaigns data category when creating and editing custom views. The user can use this data category to create a custom view for the Active Campaigns data.
Pause Campaign	Displays the Pause option in the Active Campaigns system dashboard. The user can use the Pause option to pause a running campaign.
Resume Campaign	Displays the Resume option in the Active Campaigns system dashboard. The user can use the Resume option to resume a paused campaign.
Stop Campaign	Displays the Stop option in the Active Campaigns system dashboard. The user can use the Stop option to stop a campaign.
Contacts Data Import View	• System dashboard and page available: - Imports dashboard Details of the running contact import jobs are displayed in the Imports dashboard. - Active data import job details page • Displays the customization options for the Imports dashboard and Active data import job details page on the User Preferences page. • Displays the Imports data category when creating and editing custom views. The user can use this data category to create a custom view for the running data import jobs.
Pause Contacts Data Import	Displays the Pause option for a data import job in the Imports system dashboard. The user can use the Pause option to pause a running data import job.

Table continues...

Role privileges	Options available on the Supervisor Dashboard web interface
Resume Contacts Data Import	Displays the Resume option for a data import job in the Imports system dashboard. The user can use the Resume option to resume a paused data import job.
Stop Contacts Data Import	Displays the Stop option for a data import job in the Imports system dashboard. The user can use the Stop option to stop a data import job.
DNC Data Import View	• System dashboard and page available: - Imports dashboard Details of the running DNC import jobs are displayed in the Imports dashboard. - Active DNC import job details page • Displays the customization options for the Imports dashboard and Active DNC import job details page on the User Preferences page. • Displays the Imports data category when creating and editing custom views. The user can use this data category to create a custom view for the running DNC import jobs.
Pause DNC Data Import	Displays the Pause option for a DNC import job in the Imports system dashboard. The user can use the Pause option to pause a running DNC import job.
Resume DNC Data Import	Displays the Resume option for a DNC import job in the Imports system dashboard. The user can use the Resume option to resume a paused DNC import job.
Stop DNC Data Import	Displays the Stop option for a DNC import job in the Imports system dashboard. The user can use the Stop option to stop a DNC import job.
View Active Agents	• System dashboard and page available: - Staffed Agents dashboard - Staffed Agents details page • Displays the customization options for the Staffed Agents dashboard and Staffed Agents details page on the User Preferences page. • Displays the Staffed Agents data category when creating and editing custom views. The user can use this data category to create a custom view for the Staffed Agents data.
Release From Outbound	Displays the Release From Outbound option in the Staffed Agents system dashboard. The user can use the Release From Outbound option to release an agent from outbound job.

Table continues...

Role privileges	Options available on the Supervisor Dashboard web interface
Move To Job	Displays the Move To Another Job option in the Staffed Agents system dashboard. The user can use the Move To Another Job option to move an agent to another job.
Place on Break	Displays the Forced Break option in the Staffed Agents system dashboard. The user can use the Forced Break option to move an agent to a forced break.
Force Logoff	Displays the Forced Logout option in the Staffed Agents system dashboard. The user can use the Forced Logout option to force log out an agent.
View License	• System dashboard available: - License Summary dashboard • Displays the customization options for the License Summary dashboard on the User Preferences page. • Displays the License Summary data category when creating and editing custom views. The user can use this data category to create a custom view for the License Summary data.
View Zone Failover Settings	Displays the Zone Settings icon on the Supervisor Dashboard web interface. The user can click the Zone Settings icon to view the zone settings.
Allow Zone Failover	Enables the Save button in the Zone Settings dialog box in the Supervisor Dashboard. Thereby, allowing the user to change the state of a zone, assign a failover zone, and save the changes.
View Inbound Skills	• System dashboard available: - Inbound Skills dashboard • Displays the customization options for the Inbound Skills dashboard on the User Preferences page. • Displays the Inbound Skills data category when creating and editing custom views. The user can use this data category to create a custom view for the Inbound Skills data.

Adding users

Procedure

1. In the navigation pane, click **User Management > Users**.
2. On the Users page, click **Add**.

Experience Portal displays the Add User page.

3. If organizations are enabled, from the **Organization** list, select the organization.
4. In the **Name** field, type the user name.

You can type maximum 40 characters.

5. Click one of the following:

- **Yes** to enable this user's access to Experience Portal.
- **No** to disable this user's access to Experience Portal.

6. Select the **Roles** check box to assign a predefined role to a user.

You can select more than one check box to assign the privileges of the selected roles to the user..

7. Enter **Password** to access your account.

8. Re-enter password in **Verify Password** field.

9. Select the **Enforce Password Longevity** check box to enable the user to use the password longevity settings Experience Portal. If you do not select this option, the password for this account will not expire.

10. Click **Save**.

The organizational user with a custom role cannot change the following settings:

- Data Center Configuration
- Servers
- Outbound Settings
- POM Manager
- POM Zone Configurations

Only the user with administrator role can make the changes.

- POM Zone Licenses
- CC Elite Configurations
- Context Store Configurations
- Global Configurations
- Purge Schedules
- Country Specific Phone Settings
- AACC Configuration
- Oceana Configuration

An organizational user has read-only rights for these pages.

When an administrator adds an organization-specific custom role, POM does not display change permissions on these pages.

Modifying users

Procedure

1. In the navigation pane, click **User Management > Users**.
2. On the Users page, click the user name for which you want to modify roles.
3. Click one of the following:
 - **Yes** to enable access to Experience Portal.
 - **No** to disable access to Experience Portal.
4. In the **Roles** area, select or clear the check boxes to assign or remove predefined or custom roles.
5. In the **Password** field, type the password to access your account if you want to change the users password.
6. In the **Verify Password** field, retype the password.
7. Select the **Enforce Password Longevity** check box to enable the user to use the password longevity settings on Experience Portal.

If you do not select this option, the password for this account will not expire.
8. Click **Apply** to apply the changes and continue editing.
9. Click **Save** to apply and save the changes, and return to the Users page.

Deleting users

About this task

Procedure

1. In the navigation pane, click **User Management > Users**.
2. On the Users page, click the selection box next to the user name for the user you want to delete.
3. Click **Delete**.

Adding user roles

About this task

Use this procedure to add privileges to a custom role.

Procedure

1. In the navigation pane, click **User Management > Roles**.
 2. On the Roles page, click **Add**.
Experience Portal displays the Add New Role page.
 3. In the **Name** field, type the role name.
 4. Click one of the following for password Longevity:
 - **System**: to disable the access of a user to Experience Portal after the number of days configured in the Experience Portal Login Options page.
 - **Custom**: to disable the access of a user to Experience Portal after the user exceeds the time that you set.
You can set a maximum time of 60 days.
 5. From the **Start with Role** list, select a predefined role on which you want to base the new role.
The new role has all privileges of the base role. You can add or delete privileges.
-  **Important:**
You can view the Org-related roles only if you enable organizations in POM.
6. Click **Continue**.
 7. From the **Add New Role** list, select the privileges that you want to add to the created role.
 8. Click **Apply** to apply the changes and continue editing.
 9. Click **Save** to apply and save the changes, and return to the Roles page.

Modifying user roles

About this task

Procedure

1. In the navigation pane, click **User Management > Roles**.
2. On the Roles page, click the required user role name.
3. Use the drop-down arrows to expand the privileges as required.
4. Click **View Only** selection box next to a privilege to give read-only permission for the privilege.
5. Click **Apply** to apply the changes and continue editing.
6. Click **Save** to apply and save the changes, and return to the Roles page

Deleting user roles

About this task

Use this procedure to delete custom roles.

Procedure

1. In the navigation pane, click **User Management > Roles**.
2. On the Roles page, select the check box next to the custom role you want to delete.
3. Click **Delete**.

Chapter 4: Managing Licenses

Licensing overview

The Experience Portal Management System (EPMS) regularly contacts an Avaya WebLM server to determine the number of licenses authorized for the system.

The EPMS plug-in gets the licenses from Avaya Experience Portal and distributes the licenses periodically between all online Avaya Experience Portal servers.

Editing License Settings

About this task

Use this procedure to configure the number of outbound ports in the POM license.

Experience Portal Manager (EPM) uses the configured outbound ports to ping an Avaya WebLM server, to count the licenses authorized for the system.

The EPM plug-in fetches the licenses from Avaya Experience Portal and deploys them on all POM servers.

Procedure

1. In the navigation pane, click **Security > Licensing**.
2. On the Licensing page, click the  icon in any of the following fields:
 - **License Server Information**: to edit the URL for connecting to the license server.
 - **Experience Portal**: to edit information about Experience Portal license settings.
 - **Proactive Outreach Manager**: to edit information about POM license settings.
3. (Optional) If you choose **License Server Information**, do the following:
 - a. In the **License Server URL** field, type the URL of the license server.
 - b. Click **Verify** to connect to the server, to check whether the URL is valid.
 - c. Click **Apply**.
 - d. Click **Save**.

4. **(Optional)** If you choose **Experience Portal**, type values in the **Minimum** and **Maximum** fields for the following:
 - **Announcements Ports**
 - **Email Units**
 - **SIP Signaling Connections**
 - **SMS Units**
 - **Telephony Ports**
5. If you choose **Proactive Outreach Manager**, type values in the **Minimum** and **Maximum** fields for the following:
 - **External Selection**
 - **Manual Agents**
 - **Maximum Outbound Ports**

Configure outbound ports equal to or less than the telephony ports configured on the Avaya Experience Portal system.
 - **Predictive Agents**
 - **Preview Agents**
 - **Agent Web API Service**

Licensing page field descriptions

To view the Licensing page through Avaya Experience Portal web portal, you must click **Security > Licensing** in the navigation pane. This page displays the Proactive Outreach Manager server license information.

Field or Button	Description
EMAIL Channels	Specifies a Boolean license. If you have email licenses then the value is non zero else the value is zero. A non-zero number enables POM to use the Avaya Experience Portal Email services to send e-mails, a zero value means POM is not enabled to send e-mails.
External Selection	Displays the number of licenses provided in POM for the External Selection feature.
Manual Agents	Displays the number of Manual agents allowed to log into POM.
Maximum Outbound Ports	Displays the number of ports provided for outbound calls.  Important: Configure outbound ports equal to or less than the telephony ports configured in Avaya Experience Portal.

Table continues...

Field or Button	Description
Predictive Agents	Displays the number of predictive agents allowed to log into POM.
Preview Agents	Displays the number of preview agents allowed to log into POM.
SMS Channels	Specifies a Boolean license. If you have SMS licenses, then the value is non zero, else the value is zero. A non-zero number enables POM to use the Avaya Experience Portal SMS services to send an SMS message. A zero value means POM is not enabled to send an SMS message.
Agent Web API Service	Displays the number of licenses provided for Agent Web API Service used by agent desktops such as Avaya Workspaces for Elite.
Version	Specifies the current major version of POM.
Expiration Date	The date when the license expires.
Last Successful Poll	Specifies the time stamp of the last successful instance of POM polling the WebLM License server.
Last Changed	Specifies the time stamp of the last changes.
Edit 	Use to edit the license information.

POM License Settings page field descriptions

Field or Button	Description
External Selection	Specifies the minimum and maximum number of licenses for external selection feature. • Minimum: The minimum number of external selection licenses required. • Maximum: The maximum number of external selection licenses required. The values you specify are the total number of licenses you can use. The system considers the maximum value you specify here as the <i>System capacity</i>. For more information, see Licenses page field descriptions on page 565.
Manual Agents	Specifies the total number of available Manual agent licenses. These licenses are reserved for Manual dial campaigns and are consumed every time an agent is attached to a Manual campaign. The license is released after the agent logs out or detaches from the campaign. • Minimum: The minimum number of manual licenses required. • Maximum: The maximum number of manual licenses required.

Table continues...

Field or Button	Description
Maximum Outbound Ports	Specifies the number of ports. • Minimum: The minimum number of outbound ports required. • Maximum: The maximum number of outbound ports required. The values you specify are the total licenses you can use. The system considers the maximum value you specify here as the System capacity. For more information, see Licenses page field descriptions on page 565.
Predictive Agents	Specifies the total number of available predictive agent licenses. • Minimum: The minimum number of predictive agent licenses required. • Maximum: The maximum number of predictive agent licenses required. The values you specify are the total licenses you can use. The system considers the maximum value you specify here as the <i>System capacity</i>. For more information, see Licenses page field descriptions on page 565.
Preview Agents	Specifies the total number of available preview agent licenses. • Minimum: The minimum number of preview agent licenses required. • Maximum: The maximum number of preview agent licenses required. The values you specify are the total licenses you can use. The system considers the maximum value you specify here as the <i>System capacity</i>. For more information, see Licenses page field descriptions on page 565.
Agent Web API Service	Specifies the total number of available agent web API Service licenses. • Minimum: The minimum number of agent web API Service licenses required. • Maximum: The maximum number of agent web API Service licenses required. The values you specify are the total licenses you can use. The system considers the maximum value you specify here as the <i>System capacity</i>. For more information, see Licenses page field descriptions on page 565.
Save	Use to save the settings.
Apply	Use to apply the settings.

Chapter 5: Managing campaigns

Campaigns overview

A campaign delivers messages to all its contacts through email, SMS, voice, and custom channels.

You can use POM to create agent-based or automated agentless campaigns.

Campaigns can be of the following two types:

- **Finite campaign:** A finite campaign stops after processing all contacts or when the campaign meets the specified finish criteria.
- **Infinite campaign:** An infinite campaign does not stop after processing all contacts, and you cannot specify a finish criteria for an infinite campaign. You must stop an infinite campaign manually.

Use infinite campaigns to add contacts dynamically by using the POM web services.

You can associate the following with a campaign:

- **Contact lists and filter templates:** To specify the contact (customer) records to be attempted from the campaign. You can associate one or more contact lists with a campaign.

You can associate a filter template to the contact list. POM applies the filter criteria to the contact list at the start of the campaign and selects only those contacts that meet the specified filter criteria. The campaign runs based on the filtered records from the contact list.

For more information about contact list and filter templates, see [Contact list and filter template association for a campaign](#) on page 107.

- **Skill:** To determine the suitable agents, with the skill, to be acquired for the campaign.
- **Campaign strategy:** To define the pacing type of the campaign, and various actions to take on a contact record during the campaign. For example, you can define the retry parameters for unsuccessful contact attempts such as Call Busy or Ring No Answer.

In an action, you can choose the notification channel as either voice, SMS, email, or custom action to notify the contact.

For more information about campaign strategy, see [Overview](#) on page 194.

- **DNC lists:** To determine the contacts who have opted out from receiving calls, emails, and SMS messages from the campaign. You can associate one or more Do Not Call (DNC) lists with the campaign.
- **Completion codes:** To define the outcome of the contact attempts.

You can associate one or more custom completion codes with a campaign.

For example, if you have a blood donation campaign, when a potential donor answers the call, POM plays a custom Avaya Orchestration Designer application message that prompts the potential donor to press 1 if interested or 2 if not interested. On pressing 1 or 2, the Avaya Orchestration Designer application updates the appropriate completion code (Interested in Blood Donation or Not interested in Blood Donation) by using Pluggable Data Connector (PDC).

In case of an agent-based campaign, the agent can select a custom completion code to indicate the outcome of the call.

- **Rules:** To apply restrictions on contact attempts based on contact or address, number of attempts, channel type, last attempt completion code, nuisance frequency, or attribute and system values such as, DNC, day, date, and time.

You can also perform additional configurations for a campaign, such as, assign a holiday to a campaign if you do not want POM to attempt the contact records during the holiday.

You can also specify the dialing order for the priority, regular, and retry records in a campaign.

To run agent-based campaigns, SIP and Campaign Manager connections are mandatory. Ensure that you have SIP ports reserved for POM applications and campaigns.

Agentless voice notification campaigns can run without Campaign Manager if SIP Proxy is available. Email and SMS notification campaigns can work standalone without SIP or Campaign Manager.

Note:

When running agent-based campaigns, for Call Classification Analysis (CCA) to detect an answering machine and prevent the calls from getting delivered to a live agent, disable the compliance timers. CCA also gets more time to detect an answering machine or answer human, which improves detection efficiency.

For more information about compliance timers, see *Enable Compliance Timers* on [New / Edit Campaign page field descriptions](#) on page 78.

A finite campaign can end after processing all the contacts, or you can define any one of the following finish criteria for the campaign:

- **Goal-based campaign:** A goal-based campaign stops after receiving an expected number of responses from its contacts.

For example, you can configure a goal-based campaign to terminate when the payment amount collected is greater than 30000.

In such campaigns, if the amount collected attribute is present in multiple contact lists, the campaign calculates the value of the amount collected attribute for all contact lists, and terminates the campaign after the criteria are achieved.

For other campaigns, where only the contact list associated with the campaign is considered, use distinct attributes across contact lists to set different goals for each of the campaigns.

- **Time-based campaign:** A time-based campaign stops after running for a specific duration or at a specific date and time. For example, you can configure a time-based campaign to terminate after running for 12 hours from the campaign start time.
- **Completion code-based campaign:** A completion code-based campaign stops after the campaign achieves a specific completion code condition. For example, you can

configure a completion code-based blood donation campaign to stop after receiving 50 AcceptedResponse completion codes.

*** Note:**

When you set finish criteria for a completion code-based campaign, ensure you set the archival at the job end.

For agent-based campaigns, if you use system completion codes as the completion criteria, the campaign might not stop after meeting the criteria because completion codes are overwritten based on the completion codes given by an agent.

After creating a campaign, you can run the campaign immediately or schedule it to run at a specified date and time. You can run a campaign once or multiple times.

For example, you can schedule a birthday campaign to run daily and a credit card notification campaign to run every Monday.

For recurring campaigns, the frequency of recurrence can be daily, weekly, monthly, or you can customize the frequency according to your requirement.

*** Note:**

You can run another job of the same campaign only if the job is in a **Completed, Creating History** state.

For more information about campaign job states, see [Campaign job states](#) on page 71.

A global user has access to all the campaigns across organizations. An Org user has access to the campaigns created by users belonging to a specific organization.

*** Note:**

A global user does not belong to any organization and has the POM Administration and POM Campaign Manager roles. An organization user (Org user) belongs to an organization created in Avaya Experience Portal and has the Org POM Campaign Manager role.

Campaign job states

You can use Supervisor Dashboard to monitor an active campaign. You can also pause, resume, or stop a campaign using Supervisor Dashboard.

The following are the primary states of a campaign job:

- *Job Queued*: The job is queued for running and is not performing any operations.
- *Job Active*: The job is running and is performing operations.
- *Job Completed, Creating History*: The job has stopped and is creating reports-related information in the database. The job has completed contacting all records, and there are no more records remaining.
- *Job Pause*: A user initiated a pause action on the job. After this state, the job moves to the Pausing state.

- *Job Pausing*: The job is pausing. After this state, the job moves to the Paused state.
- *Job Paused*: The job is paused and is not attempting any records. For agent-based campaigns, all agents are released from the job.
- *Running, Filter In Progress*: The job is filtering the records according to the filter criteria, and the contact attempts are also in progress.
- *Queued, Filter In Progress*: The job is filtering the records according to the filter criteria, and the contact attempts did not start.
- *Job Resumed*: The user initiates a resume action on the job. After this state, the job moves to the Active state.
- *Job Stop*: The user initiates a stop action on the job. After this state, the job moves to the Stopping state.
- *Stopped, Callback*: The user stopped the job, and the job is waiting for callback records to complete.
- *Stop, StoppedCallback*: The user initiates a stop action on the job in the StoppedCallback state.
- *Job Stopped*: The user stopped the job, and the job does not perform any further operations.
- *Job Stopping*: The job is stopping the contact attempts. After this state, the job moves to the Stopped state.
- *Callback*: The job is completed. Attempts on all contacts are complete, except callbacks. A job in callback state has only callbacks waiting for their attempt time to arrive.

There can be multiple states of a single campaign job. For example:

- A job can be in Running state and also in Filter in Progress state. This means that the job is attempting the records and filtering the records according to the selection criteria mentioned on the Campaign Creation page and in the campaign strategy.
- A job can be in Completed state and in Creating History state. This means that the job has completed attempting all records and there are no more records remaining, and the job moves the records to the archival state.

List of campaign-related resources and configurations for creating and managing a campaign

Campaign-related resources

The following table lists the campaign-related resources needed for creating a campaign. You can associate these resources to the campaign according to your requirement.

No.	Task	Description	Related topics	Notes	✓
1	Create a contact list	Associate contact lists with the campaign to determine the contacts to be processed from the campaign. You must associate at least one contact list with the campaign.	• Contact Lists overview on page 331 • Adding a contact list on page 332 • New / Edit Campaign page field descriptions on page 78		
2	Create custom contact attributes	Associate the custom or predefined contact attributes with the contact list to define the properties of the contact data. For example, First Name and Last Name. Ensure the attributes in the source file, from where you import the contacts data into the contact list, match the attributes associated with the contact list.	• Overview on page 409 • Adding contact attributes on page 419 • Associating attributes with a contact list on page 387		
3	Create a filter template for the contact list	Associate a filter template with the contact list of the campaign to filter the contacts based on specific criteria. If you associate a filter template with the contact list, POM processes only the filtered contacts. For example, create a filter template to filter contacts with credit card type as Platinum.	• Overview on page 315 • Creating a filter template for campaigns or file splitters on page 315 • New / Edit Campaign page field descriptions on page 78		
4	Create a filter template for file splitter	Create a filter template for file splitter if you want to create a file splitter.	• Overview on page 315 • Creating a filter template for campaigns or file splitters on page 315		

Table continues...

No.	Task	Description	Related topics	Notes	✓
5	Create a file splitter	Use file splitter to split a large .csv source file containing contacts data into multiple contact lists, and import the contact lists in POM.	• Overview on page 486 • Adding file splitters on page 486		
6	Create Do Not Call (DNC) lists	Use DNC list to determine the contacts who have opted out from receiving calls, emails, and SMS messages from the campaign.	• Overview on page 468 • Adding a DNC list on page 468		
7	Create a DNC group	Add DNC lists to a DNC group and associate the DNC group with the campaign to determine the contacts who have opted out from receiving calls, emails, and SMS messages from the campaign.	• Adding a DNC group on page 484 • Assigning DNC lists to a DNC group on page 484 • New / Edit Campaign page field descriptions on page 78		
8	Create custom completion codes	Associate the custom completion codes with the campaign. The associated completion codes are available to the agent through the agent desktop. The agent can use a completion code to mark the outcome of a contact attempt. For example, Opted free trial. The associated completion codes are also available to a custom application.	• Overview on page 173 • Adding a completion code on page 189 • New / Edit Campaign page field descriptions on page 78		

Table continues...

No.	Task	Description	Related topics	Notes	✓
9	Create rules	Associate rules with the campaign to define restrictions for the contact attempts based on contact or address, number of attempts, channel, last attempt completion code, or attribute values and system restrictions. For example, you can create a rule to allow maximum three call attempts in 24 hours, and associate the rule with the campaign.	• Overview on page 270 • Creating a rule on page 272 • Associating and disassociating rules with a campaign on page 120		
10	Configure holidays	Associate holidays with the campaign to restrict POM from attempting contacts during the holidays.	• Overview on page 647 • Adding a holiday on page 647 • Associating and disassociating holidays with a campaign on page 119		
11	Configure an SFTP server	Associate an SFTP server with the campaign to export the successfully attempted contacts data along with the completion codes and other result details to the SFTP server after the campaign is completed. Alternatively, you can also download the exported files by clicking  > Export Files on the Campaign Manager page.	• Adding SFTP server on page 654 • New / Edit Campaign page field descriptions on page 78		

Table continues...

No.	Task	Description	Related topics	Notes	✓
12	Create campaign attributes	Use campaign attributes in agent scripts to track and monitor the performance of the campaign. For example, create a FundsCollected attribute and use it in an agent script. During the call, the agent can update the funds collected amount in the FundsCollected attribute through the agent desktop.	• Overview on page 170 • Adding a campaign attribute on page 171		
13	Create agent attributes	Use agent attributes in agent scripts to track and monitor the performance of the agent.	• Overview on page 511 • Creating agent scripts on page 511		
14	Create an agent script	Associate an agent script with the Agent node of the campaign strategy of the campaign. The associated agent script is available to the agent through the agent desktop during the call. The agent can use the agent script to gather or update information during a call.	• Overview on page 511 • Creating agent scripts on page 511		
15	Create a campaign strategy	Associate a campaign strategy with the campaign to define the campaign pacing type and various actions to be performed on a contact during the campaign. You can also set various rules for a specific contact, such as, time restrictions and number of retries. You must associate a campaign strategy to the campaign when creating the campaign.	• Overview on page 194 • Creating a campaign strategy on page 209 • New / Edit Campaign page field descriptions on page 78		

Other configurations

The following table lists the other configurations for creating and managing campaigns:

No.	Task	Description	Related topic	Notes	✓
1	Configure global settings	To manage settings, such as call, campaign, callback, and DNC, across all campaigns.	Configuring global settings on page 566		
2	Configure country specific phone settings	To define phone number reject patterns, time zone and area code mappings, time zone-specific and state-specific guard time, and dialing rules.	Overview on page 602		
3	Configure purge schedules	To purge the campaign and agent data, contact list import files, export files, DNC import files, splitter files, and database entries of import at regular intervals.	Overview on page 595		

After you create and run a campaign, you can use the Supervisor Dashboard to perform real-time monitoring of the active campaigns. You can also monitor campaign-related resources and activities, such as, staffed agents, and active contact data and Do-Not-Call (DNC) information import jobs.

You can also view the successfully attempted contacts data of a campaign after running the campaign.

For more information, see [New / Edit Campaign page field descriptions](#) on page 78.

Managing Campaigns

Creating a campaign

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Manager**.
3. On the Campaign Manager page, click **New Campaign**.
4. On the New Campaign page, add the relevant information on the **Details**, **Campaign**, **Contacts**, **Completion Codes**, **Completion Processing**, **Media**, and **Additional Parameter** tabs.
5. Click **Save**.

New / Edit Campaign page field descriptions

Details tab

Field or Button	Description
Campaign Information	
Name	Type a unique name for the campaign. After you create a campaign, you cannot edit its name. The maximum allowed length is 80 characters. Campaign name cannot contain the following special characters: space and { , (, @ , ~ , ` , ! , ' , ; , , # , \ , \$, % , & , ? , " , < , > ,) , }
Description	Type a description for the campaign. The maximum allowed length is 255 characters. Campaign description cannot contain the following special characters: ^ , ~ , ` , ! , ' , ; , , \$, # , \ , < , > , & , "

Campaign tab

Field or Button	Description
Campaign Strategy Configuration	
Select Campaign Strategy	Click the campaign strategy you want to associate with the campaign. This field displays only those campaign strategies that are in a Completed state. POM uses the campaign strategy to determine the actions to be taken on the contact records during the campaign. For example, in an action, you can define the retry parameters for unsuccessful contact attempts such as call busy and ring no answer. For more information about campaign strategies, see Overview on page 194.
Refresh	Click to refresh the list of campaign strategies in the Campaign Strategy field.
View Strategy	Click to view the details of the selected campaign strategy.
Campaign Type Configuration	

Table continues...

Field or Button	Description
Campaign Type	Click the type of campaign you want to create. The following are the options: • Finite • Infinite The default is Finite campaign. You cannot change the campaign type after running the campaign.
Do not associate any contact list at start	Enable this option if you want to create and start the campaign without associating a contact list. You can associate contact lists with the campaign when the campaign is running. This option is available only if you select Infinite in Campaign Type.
Zone	Click one or more zones you want to use for this campaign. You can add only the contact lists created for these zones to a running job of this campaign. This field is available only if you select Infinite in Campaign Type and enable the Do not associate any contact List at start option.
ANI Configuration	
Configure the Automatic Number Identification (ANI) settings in this area.	
Sender's Display Name	Type the display name of the sender. Do not start the sender's display name with an ampersand (&). Sender's display name cannot contain special characters such as ` , ' , < , > , " The value you specify in this field overrides the value configured in the campaign strategy.
Sender's Address	Type the address of the sender such as SIP, phone number, or email address to indicate where the call or message is coming from. The number must be valid and in E.164 format. Do not start the sender's address with an ampersand (&). Sender's address cannot contain special characters such as ` , ' , < , > , " The value you specify in this field overrides the value configured in the campaign strategy.
Skill Configuration	

Table continues...

Field or Button	Description
Select Skill	Click the skill you want to assign to the campaign. POM uses the skill of the campaign to determine the suitable agents, with the relevant skill, to process the contacts from the campaign. The skill you specify in this field overrides the skill configured in the campaign strategy.
DNC Configuration	
Apply DNC Group	Enable this option to associate one or more DNC groups with the campaign.
Select DNC Groups for Campaign	Click one or more DNC groups you want to associate with the campaign. POM restricts contacting the phone numbers and email addresses that are part of the DNC lists belonging to the selected DNC groups. To modify a DNC group association of a running campaign, you must first pause the campaign, make the changes, and then resume the campaign for the changes to take effect. This field is displayed only if you enable the Apply DNC Group option.
Select DNC Group to be used for Agent / Web service	Select a default DNC group for the agents or web service. POM adds the phone numbers marked as DNC for the campaign by the agents or web service to this DNC group. This field is displayed only if you enable the Apply DNC Group option.
DNC By User Contact ID	Enable this option if DNC by User Contact ID is to be enabled. This field is displayed only if you enable the Apply DNC Group option.
DNC By Customer ID	Enable this option if DNC by Customer ID is to be enabled. This field is displayed only if you enable the Apply DNC Group option.

Contacts tab

Field or Button	Description
Contact List Configuration	
Contact List and Filter Template Association	
This area is not displayed if you select Infinite in the Campaign Type field and enable the Do not associate any contact list at start option. For more information about contact list and filter template association, see Contact list and filter template association for a campaign on page 107.	

Table continues...

Field or Button	Description
Add New	Click to add a new row and associate a contact list and filter template to the campaign.
Contact List	Click the contact list you want to add to the campaign. You can add maximum 50 contact lists to the campaign. Ensure that at least one contact list is added to the campaign. If the Contact Assignment to Agent option is set as Attribute or Agent ID or both in POM, ensure that the contact list you add contains the attributes that are selected for the attribute/agent ID-based contact assignment. For more information about contact lists, see Contact Lists overview on page 331.
Filter Template	Click the filter template you want to associate with the corresponding contact list. The contacts from the contact list are filtered according to the filter and sort conditions configured in the filter template. You can associate only one filter template to a contact list. However, you can associate the same filter template to multiple contact lists. You can associate a filter template to a contact list only if the attributes in the filter template are present in the contact list. You can edit a filter template any time on the Campaign creation page while creating a new campaign or editing an existing campaign. The filter template turns into a hyperlink after you associate the filter template with a contact list. You can edit the filter template by clicking the filter template hyperlink. The updates to the Filter template applies to all the campaigns that use the filter template. However, the updates do not impact the campaigns that are running. For an attribute-based campaign, ensure that the filter template you associate to the contact list of the campaign does not contain sort condition attributes that are already configured as attributes for attribute-based dialing on the Campaign Creation page. This is because POM, by default, sorts the filtered contacts based on the attribute-based dialing attributes. POM uses the filtered records for the campaign. If you do not associate a filter template to a contact list, POM uses all records from the contact list for the campaign. For more information about filter templates, see Overview on page 315.

Table continues...

Field or Button	Description
Dialing Allocation Percentage	Type the dialing allocation percentage for the corresponding contact list. If you select the No Dialing allocation check box, the default dialing allocation is 100 percent for all contact lists of the campaign. You cannot edit the dialing allocation percentage if the No Dialing allocation check box is selected. For more information, see Contact list and filter template association for a campaign on page 107 and Dialing allocation considerations on page 109.
Actions	The following are the options: • Save : Click to save the contact list and filter template association details. • View : Click to view the following: - If the corresponding row contains a contact list without any filter template associated, the View option displays the contacts in the contact list. - If the corresponding row contains a contact list and filter template association, the View option displays the filtered contacts based on the corresponding contact list and filter template association. The filtered contacts are displayed on the View Contacts page. The View Contacts page displays the following contact attributes: System Contact ID, ID, all attributes of data type PHONE, all attributes of data type EMAIL, and all attributes that are part of the filter template. POM treats the float type of attributes with 10 digit precision after decimal. Hence, trailing zeroes appear in the field values of float type of attributes. For example, if the attribute value is 123.12, the displayed value on the View Contacts page is 123.1200000000. • Edit : Click to edit the corresponding contact list and filter template association details. • Delete : Click to delete the corresponding contact list and filter template association.
Save All	Click to save all contact list and filter template associations.
Apply same filter	Select this check box if you want to apply the filter template set in the first contact list and filter template association to all other associations in the campaign.

Table continues...

Field or Button	Description
No Dialing Allocation	Select this check box if you want to allocate 100 percent dialing allocation to each contact list of the campaign. The No Dialing allocation check box is available only after the Apply Same Filter check box is selected.
View Contacts	Click to view the total number of filtered contacts from all contact lists of the campaign. When you click View Contacts, The number of Contacts filtered are <number of filtered contacts> link is displayed. Click the link to view the filtered contacts. The filtered contacts are displayed on the View Contacts page according to the sequence of the contact list and filter template associations. The View Contacts page displays the following contact attributes: System Contact ID, ID, all attributes of data type PHONE, all attributes of data type EMAIL, and all attributes that are part of all associated filter templates. POM treats the float type of attributes with 10 digit precision after decimal. Hence, trailing zeroes appear in the field values of float type of attributes. For example, if the attribute value is 123.12, the displayed value in the Contacts Filtered dialog box is 123.1200000000.  Note: If clicking View Contacts shows an Internal Server Error or Service Temporarily Unavailable error, it indicates that POM cannot complete the request before page time out. To avoid getting this error, change the page time out value in the /etc/httpd/conf/httpd.conf file. Restart the httpd and tomcat services for the changes to take effect.

Table continues...

Field or Button	Description
Pause Dialing During Contact Selection (Enable this to boost the speed of filtering the records)	When you enable the Pause Dialing During Contact Selection option, POM boosts the speed of filtering the records. Enable this option if you want to start dialing only after POM finishes filtering all contacts based on the filter criteria specified. If you disable the Pause Dialing During Contact Selection option, POM starts dialing the contacts after the first set of records are filtered. POM picks contacts for dialing from filtered contacts as per the specified sort criteria. Hence, if you enable the Pause Dialing During Contact Selection option, then because all contacts are already filtered, POM applies the sort criteria on all filtered contacts and then picks the contacts for dialing. When you disable the Pause Dialing During Contact Selection option, then because filtering process is in progress, POM applies the sort criteria on the contacts that are filtered till that time and picks up those filtered contacts for dialing. POM checks for the Pause Dialing During Contact Selection configuration every time it filters the records. If you change the filter and sort conditions at run time from the Supervisor Dashboard while the campaign is running and the Pause Dialing During Record Selection option is enabled, POM pauses the dialing till the filtering and sorting is complete.
Contact Assignment to Agent Use this area to specify whether the contact assignment to agents must be done based on contact attributes, agent ID, or both in the campaign. The contact attribute-based contact assignment and agent ID-based contact assignment are applicable for a campaign having a single action node in a handler and all the Call action nodes of preview type. Only custom attributes are supported. Attribute skill configuration is case-sensitive. In case of a conflict in attribute matching, when two records have matching attribute count, sort order is applied to the attributes. Attributes matching is done in the chronological order starting from the top.	
Attributes	Select this check box if you want to filter the contacts based on contact attributes.

Table continues...

Field or Button	Description
Select Attributes	Select the contact attributes based on which you want to filter the contacts. The list of the available attributes varies with the POM installation mode. In a contact attribute-based contact assignment, POM presents a contact to an agent only if the contact attributes defined in the contact match the agent attributes. This field is displayed only if you select the Attributes check box. For more information, see Attribute availability in each POM install mode for configuring attribute-based or agent ID-based record assignment on page 104.
Agent ID	Select this check box if you want to filter the contacts based on agent attributes.
Select Agent ID	Select the attribute that contains the agent IDs. In an agent ID-based record assignment, if the selected contact has an agent ID specified, POM presents the contact to that specific agent. This field is displayed only if you select the Agent ID check box.
Dialing Order Configuration	
Dialing Order	Drag the Priority, Retry, and Regular record types up or down in the hierarchy to set the order in which these record types must be dialed. The default dialing order is: Priority, Retry and Regular records. Which means amongst a priority record, a retry record matured for dialing, and a regular record, the priority record is dialed first, followed by the retry record, followed by the regular record. When setting the dialing order, ensure that the order of the priority records is higher than the regular records. Otherwise, the system shows an error message. Regular records have priority 5. Records with priority 6 and above are considered as high priority records. A high priority record is always dialed before a regular record. For more information about dialing order, see Proactive Outreach Manager dialing order on page 137.

Table continues...

Field or Button	Description
Time Zone Phone Attributes	Use this area to configure the follow-the-sun dialing feature for the campaign. This feature is applicable only for the Call task nodes of a campaign. For more information about this feature, see Advanced guard time with follow-the-sun dialing on page 111 and Checklist for configuring the advanced guard time with follow-the-sun dialing feature on page 113. For information about how POM determines an intersecting guard time between the guard time of a phone attribute, user preferred time, and zip code-based guard time, see <i>Avaya Proactive Outreach Manager Overview and Specification</i>.
Time Zone Phone Attributes	Select the phone attributes on which POM must perform guard time validation before it picks up a record for dialing from the operational database. POM picks up a record for dialing only if the guard time of at least one of these phone attributes is open for dialing. You can specify a maximum of five phone attributes.  Tip: Ensure the phone attributes you select in this field are associated with the campaign strategy. If your campaign strategy contains phone attributes belonging to different countries and time zones, select one phone attribute from each of these countries and time zones in this field. For example, your campaign strategy contains seven phone attributes, out of which three belong to United States (PST), two belong to United States (EST), and two belong to Canada (Newfoundland). In this field, select one phone attribute belonging to United States (PST), one phone attribute belonging to United States (EST), and one phone attribute belonging to Canada (Newfoundland). For optimal functioning of the follow-the-sun dialing feature, ensure your campaign strategy does not contain phone attributes belonging to more than two or three different countries and time zones.
User Preferred Time	Enable this option to use the values from the Phone Allowed Time and Phone Disallowed Time attributes for determining the guard time of each phone attribute of a record.

Table continues...

Field or Button	Description
Timezone of Zipcode	Enable this option to use the zip code-based guard time of the records for determining the guard time of each phone attribute of a record. If you enable Timezone of Zipcode without selecting phone attributes in Time Zone Phone Attributes, POM uses the zip code-based guard time of the records to determine the time during which the records can be picked up for dialing from the operational database. However, when actually dialing a record, POM also considers the guard time of a phone attribute to determine the final guard time for the phone attribute. Hence, to avoid the records from getting temporarily restricted at the time of actual dialing, configure the phone attributes in the Time Zone Phone Attributes field so that POM picks up the records for dialing from the operational database only when the guard time of at least one of these phone attributes is open for dialing.

Completion Codes tab

Field or Button	Description
Completion Code Configuration	
Select Completion Codes for Campaign	Click one or more custom completion codes you want to associate with the campaign and use the completion codes on agent desktop, agent scripts, or Pluggable Data Connector (PDC) application. When an agent processes a contact from the campaign, the associated completion codes are available to the agent through the agent desktop. The agent can use the relevant completion code to mark the outcome of the contact attempt. POM can further process the contact based on the completion code and campaign strategy. This field displays the custom completion codes configured in POM. For more information about completion codes, see Overview on page 173.

Table continues...

Field or Button	Description
Select Exclude Completion Codes for Attempt Calculation	Click the completion codes that you do not want to count when calculating the total number of contact attempts for the campaign. This field displays all system and custom completion codes. For example, if you select Ring No Answer in this field, then all previous contact attempts with the RING_NO_ANSWER completion code are not counted when calculating the total number of contact attempts to check whether it meets a rule restriction.
Rule Association	
Name of the disabled rules are suffixed with the term Disabled to indicate that the rules are disabled.	
Global Rule	
Use default global rule ordering	Enable this option to retain the default order for running the global rules.
Global Rule	Use this area to edit the rule execution order of the global rules. To set a specific order for running the global rules, select a rule and drag the rule up or down in the hierarchy according to your requirements. This area displays the global-level rules filtered based on the organization of the campaign. To modify the global rule execution order, disable the Use default global rule ordering option.
Campaign Rule	
Use this area to assign campaign-level rules to the campaign.	
Select Zone Associated to Campaign	Click the zone associated with the campaign. The rules you assign to the campaign are applied to the selected zone.
Available Rules	Displays the list of campaign-level rules associated with the organization of the campaign. To assign rules to the campaign, do any of the following in the Available Rules area: - To assign a rule to the campaign, click + corresponding to the rule. - To assign all rules to the campaign, click Add All.

Table continues...

Field or Button	Description
Selected Rules	Displays the rules assigned to the campaign. To remove the assigned rules from the campaign, do any of the following in the Selected Rules area: - To remove an assigned rule from the campaign, click  corresponding to the rule. - To remove all assigned rules from the campaign, click Remove All. To set a specific order for running the campaign rules, select a rule and drag the rule up or down in the hierarchy according to your requirements.
Holiday Association	
Use this area to assign holidays to the campaign. POM restricts outbound dialing for the campaign during the associated holidays.	
Ignore All Holidays	Enable this option to allow POM to establish outbound dialing for the campaign during the assigned holidays.
Available Holidays	To assign holidays to the campaign, do any of the following in the Available Holidays area: - To assign a holiday to the campaign, click  corresponding to the holiday. - To assign all holidays to the campaign, click Add All.
Selected Holidays	Displays the holidays assigned to the campaign. To remove the assigned holidays from the campaign, do any of the following in the Selected Holidays area: - To remove an assigned holiday from the campaign, click  corresponding to the holiday. - To remove all assigned holidays from the campaign, click Remove All.

Completion Processing tab

Use this tab to configure a finish criteria for the campaign. You can specify a time-based, completion-code based, or goal-based finish criteria. The campaign finishes after the specified finish criteria is met. If you do not specify a finish criteria for the campaign, the campaign finishes after all contacts from the campaign are processed.

For more information about finish criteria, see [Campaigns overview](#) on page 69.

Note:

If a campaign has a time-based or goal-based finish criteria and the job status is Filter in Progress, then even when the finish criteria is met, the job continues to run until all contacts in the contact list are filtered. When all contacts are filtered, the campaign state changes to Running, after which the finish criteria is triggered and the campaign stops.

Field or Button	Description
Time Based Finish Criteria This area is available only for a finite campaign.	
Finish After (Hours : Minutes)	Use this option to finish a campaign after it runs for a specific time, and specify the time in hour and minute. For example, to finish the campaign after it runs for 6 hours from the start time, specify 6:00 in this field. The minimum and maximum values for hours are 0 to 1000 respectively, and the minimum and maximum values for minutes are 0 to 59 respectively. A campaign with time-based finish criteria finishes after running for the specified time duration. If you specify the value as 0:0, the time-based finish criteria is ignored. The campaign continues to run until all contacts are done or the campaign is manually stopped.
Finish At (Date : Time)	Use this option to finish the campaign at a specific time of a specific day. Use the calendar wizard to select the date, and then specify the time in hours and minutes.  Note: The Time field is mandatory, but Date is optional. If you specify only Time, the campaign stops every day at the same time.
Check Time Based Finish Criteria For Paused Campaign	Enable this option to check the time even for a paused campaign so that the campaign is stopped automatically after the criteria is met. This feature is applicable only for campaigns with time-based finish criteria.
Completion Code Based Finish Criteria This area is available only for a finite campaign.	
Add	Click to add a condition.

Table continues...

Field or Button	Description
Select Finish Criteria	Click any one of the following options: • ANY of the below conditions are met: To consider the finish criteria as met if any of the completion code-based finish conditions you configure are met. • ALL of the below conditions are met: To consider the finish criteria as met only if all of the completion code-based finish conditions you configure are met. • Custom: To consider the finish criteria as met if a combination of the completion code-based finish conditions you configure are met. This field is displayed only after you add two or more completion code-based finish conditions.
Custom Condition	This field is displayed if you select Custom in the Select Finish Criteria field. Select a combination of completion code-based finish conditions to set the completion code-based finish criteria. The following is an example format of a custom finish criteria for conditions 1, 2, 3, 4, and 5: (1 and (2 or ((3 and 4) or 5))) When selecting the conditions, do not repeat or skip a condition number in the custom condition string. For example, if you have four conditions, 1, 2, 3, and 4, then you cannot write the custom criteria as: (1 and 2) OR (1 and 3). You can decide the order for the finish criteria and whether to check a condition inclusive of all conditions or exclusive of some conditions.
Condition	Displays the condition numbering.
Completion Code	Click one or more completion codes you want to use to finish the campaign. A campaign with completion code-based finish criteria finishes after a specific completion code condition is achieved. For example, you can finish a blood donation campaign after you receive 50 AcceptedResponse completion codes. This field displays the system and custom completion codes.
Operator	Displays the operator type, that is, > (greater than). You can apply only the > (greater than) operator.

Table continues...

Field or Button	Description
Value	Type the value you want to use to finish the campaign. For example, if you specify the criteria as Answer Human is greater than 10, the campaign is finishes after 10 calls are answered by a live voice. If you select more than one completion codes, the condition AND or OR is applied depending on the option you select in the Finish Conditions field. For example, if you have selected the ANY of the below conditions are met option in the Finish Conditions field and configured the following conditions: • Answer Human > 300 • Call Busy > 30 % Then, the finish criteria is considered as met and the campaign is finished if any of the following criteria is met: • The Answer Human dispositions are greater than 300. • The Call Busy dispositions count exceeds 30% of total contacts for the job.
Actions	Click Delete to delete the condition.
Goal Based Finish Criteria This area is available only for a finite campaign.	
Add	Click to add a condition.
Select Finish Criteria	Click any one of the following options: • ANY of the below conditions are met: To consider the finish criteria as met if any of the goal-based finish conditions you configure are met. • ALL of the below conditions are met: To consider the finish criteria as met only if all the goal-based finish conditions you configure are met. • Custom: To consider the finish criteria as met if a combination of the goal-based finish conditions you configure are met. This field is displayed only after you add two or more goal-based finish conditions.

Table continues...

Field or Button	Description
Custom Condition	This field is displayed if you select Custom in the Select Finish Criteria field. Select a combination of goal-based finish conditions to set the goal-based finish criteria. The following is an example format of a custom finish criteria for conditions 1, 2, 3, 4, and 5: (1 and (2 or ((3 and 4) or 5))) When selecting the conditions, do not repeat or skip a condition number in the custom condition string. For example, if you have four conditions, 1, 2, 3, and 4, you cannot write the custom criteria as: (1 and 2) OR (1 and 3). You can decide the order for the finish criteria and whether to check a condition inclusive of all conditions or exclusive of some conditions.
Condition	Displays the condition numbering.
Contact Attribute	Click the contact attribute you want to use to finish the campaign. You can add more than one contact attributes.  Note: You can select only numeric contact attributes in the goal-based finish criteria. A campaign with goal-based finish criteria finishes when the sum of the processed contact attribute values is greater than the value defined in the condition.
Operator	Displays the operator type, that is, sum > (sum greater than). You can apply only the sum > (sum greater than) operator.

Table continues...

Field or Button	Description
Value	Type the value you want to use to finish the campaign. For example, if you specify the paymentamount sum > 30000 contact attribute condition, the campaign finishes when the total payment collected is greater than 30000. If you select more than one contact attributes, the condition AND or OR is applied depending on the option you select in the Finish Conditions field. For example, if you have selected the ANY of the below conditions are met option in the Finish Conditions field and configured the following conditions: • paymentamount sum > 30000 • dailytargetamount sum > 25000 Then, the finish criteria is considered as met and the campaign is finished if any of the following criteria is met: • The payment amount collected exceeds 30000. • The daily target amount collected exceeds 25000.
Actions	Click Delete to delete the condition.
Export Data Configuration	

Table continues...

Field or Button	Description
Export Data	Enable this option to export the successfully attempted contacts data to a .csv file. You can specify the contact attributes and contact attempt-related attributes to export. You can also specify the completion codes based on which you want to export the attempted contacts data. POM exports the attempted contacts that match the specified completion codes. The contact information is exported as per the configured export frequency. For a finite job, if you enable this option and do not configure an export frequency, then by default, POM runs the export after the campaign job stops or finishes. For an infinite campaign, if you enable this option and do not configure an export frequency, then the export frequency is hourly. When POM runs the campaign export, the export files containing the processed contact records of the campaign are stored in the respective organization directory. The export location for both finite and infinite campaigns is: <code>\$POM_HOME/public/<orgid>/export/</code> The exported files containing the processed contact records of finite and infinite campaigns are also exported to the SFTP server you specify in the SFTP Server Assignment field. You can also download the exported files by clicking Action > Export Files on the Campaign Manager page.  Note: When upgrading POM to release 3.1.3, backup the data of the old export directory mentioned in the Global Configurations page. POM copies the data to the exported .csv file only after the contacts are dialed and the history creation process is complete. The data to be exported to the .csv file is picked up from the history tables and not from the operational tables. Hence, if a contact is updated after the job is completed, the updated data is not copied to the exported file. POM copies data to contact history table in the following cases: • When contact is marked as Done or Restricted. • When contact had callback and the callback expired. • While creating history of contacts that are not attempted.

Table continues...

Field or Button	Description
Export Frequency	The Export Frequency configuration was previously available on the campaign schedule creation page. Export frequency for campaigns can now be configured only from Campaign Creation page. Therefore, you can configure only one export frequency for a campaign. You can edit the campaign at different times to change the export frequency when required. Multiple schedules configured for a campaign having multiple export frequencies specified, get migrated and the export frequency specified in the latest configured schedule that appears in the sequence is selected. Specify the frequency at which POM must run the export and create the .csv file. The Export Frequency option is available only after you enable the Export Data option. The following are the options: • Hourly: To run the export at every clock hour for the campaign. The .csv file created every hour contains the contacts dialed and that meet the export criteria during that hour. When the campaign stops or finishes, a final export file is created containing the contacts dialed and that meet the export criteria since the last file creation. • Run Every N minutes: After the campaign starts, POM runs the export at every N minutes specified. The .csv file contains the contacts dialed and that meet the export criteria between every N minutes. When the campaign stops or finishes, a final export file is created containing the contacts dialed and that meet the export criteria since the last file creation. After you select this option, the Export Every Minutes field is displayed. You can specify the number of minutes in the Export Every Minutes field. The minimum and maximum values are 15 and 10080 minutes, respectively. • Daily At: To run the export once at the specified time every day. When the campaign stops or finishes, a final export file is created containing the contacts dialed and that meet the export criteria since the last file creation. After you select this option, the Export Daily At field is displayed. You can specify the time in the Export Daily At field. If no contacts are dialed during the specified export frequency, POM does not create an export file.

Table continues...

Field or Button	Description
Select Export File Headers	Click the contact attributes such as First Name and Last Name, and the contact attempt-related attributes such as Call Start Time and Call Connect Time you want to export. From POM 3.0.1 onwards, you cannot export the Last Attempt time and Last Successful Attempt time attributes. If you have specified these attributes earlier, POM ignores these attributes while exporting the contacts. When exporting the contacts, POM considers the order of the attributes that you have specified when associating the attributes with a selected contact list. If you have not specified any order when associating the attributes with a contact list, POM considers the default order while importing the contacts. POM maintains a sequence of the columns to export. Example 1: Contactlist1 and contactlist2 have the salary attribute in a different order. The salary attribute in contactlist1 is the second attribute, and the salary attribute in contactlist2 is the third attribute. When exporting the contacts, POM gives preference to the salary attribute in contactlist1 because the salary attribute is in a higher order. Example 2: You have two different attributes in contactlist1 and contactlist2, and these attributes are at the same location. The salary attribute in contactlist1 is the second attribute, and the count attribute in contactlist2 is the second attribute. When exporting the contacts, POM gives preference to the salary attribute in contactlist1. The Export File Headers field is displayed after you enable the Export Data option.
Select Completion Code	Select one or more completion codes, such as Answer Human, to export the attempted contacts data that match the selected completion codes. This field displays all system and custom completion codes. The Completion Code field is displayed after you enable the Export Data option. You can also configure whether to export these completion codes or their descriptions to the campaign export .csv file. For more information, see Exporting completion codes to the campaign export .csv file on page 128.
SFTP Server Assignment	This field displays the SFTP servers that you add to POM. Click the SFTP server where you want to export the .csv file. POM creates a local export file and also exports the .csv file to the SFTP server.

Table continues...

Field or Button	Description
Custom Post Processor Class	Type the name of the custom Java class you want to use to export contacts with customized details, such as campaign name, campaign ID, phone number, and email address, to the .csv file. You must specify the class path name. The class must implement the <code>PomJobPostProcessor</code> interface and you must copy the class to the <code>\$POM_HOME/lib/custom</code> folder. For a sample class file, see the <i>Developer's Guide for Proactive Outreach Manager</i>.
Additional Completion Configuration	
Select Campaign For Linking	Select the campaign you want to link to this campaign. The linked campaign starts when this campaign stops. For more information about campaign linking, see Campaign linking overview on page 116.

Media tab

Field or Button	Description
EPM Servers	
Default	Select one or more EPM servers to associate with the campaign. The campaign by default uses all EPM servers configured to make outbound calls. POM displays the EPM servers of all zones depending on the associated campaigns with the respective zones. If you select multiple EPM servers, it results in more calls per hour. Also, multiple EPM servers provide load balancing and backup mechanism if one of the servers is not functional. For more information about load balancing, see <i>Avaya Proactive Outreach Manager High Availability</i> guide.  Note: If you select only one EPM server, POM sends all <code>LaunchCCXML</code> web service requests to the selected EPM server. If you select more than one EPM server, the POM server balances the load on the <code>LaunchCCXML</code> web service request in round-robin method.
Prefix Configuration	

Table continues...

Field or Button	Description
Dialing prefix	Type the prefix number, such as country code or area code, that POM must use to dial the contacts. The dialing prefix can begin with an asterisk (*). The prefix you specify in this field overrides the prefix configured in the dialing rules in the Country Specific Phone Settings configuration. Dialing prefix is required to make successful calls.
SMS prefix	Type the prefix that POM must use to send SMS messages to the contacts from the campaign. POM adds the prefix you specify to a phone number before sending an SMS message. For example, if the number is 12345 and prefix is 91, POM sends the SMS to 9112345.
CCA Configuration	
This area is not available for a preview type of campaign.	
CCA Start	Specify when must the Call Classification Analysis (CCA) start. The following are the options: • On Connect: Click to start the CCA when the call is answered. • On Progress: Click to start the CCA immediately when POM finishes dialing the number and the call progress starts.
CCA Timeout (milliseconds)	Type the CCA timeout value. This value depends on the On Connect and On Progress values. For On Connect, the default value is 7500 milliseconds. The minimum and maximum values are 5000 and 20000 milliseconds, respectively. For On Progress, the default value is 24000 milliseconds. The minimum and maximum values are 5000 to 45000 milliseconds, respectively.

Table continues...

Field or Button	Description
Enable compliance timers	Option to enable or disable the compliance timers. This option is enabled by default. If you disable this option, POM driver waits for the call classification results before starting any application or connecting to the agent. The maximum wait time for CCA result is determined by the CCA Timeout value. If you enable this option, POM waits for call classification results till the expiry of the compliance timers. If call classification results are not available within the given time, Answer Human treatment is started for the call. The completion code gets updated as per the classification events received till the call is active for a notification campaign or before getting patched to an agent for an agent-based campaign. For notification campaign, on late detection of Answer Machine, the Answer Human application being played is stopped and Answer Machine application is started. For the Start Of Voice timer and Live Voice timer logs, see the CCXML logs on the MPP server. When you enable this option, the following options are displayed: • Start of Voice Timeout (milliseconds): To configure the value for the timer. The default value is 2000 milliseconds. • Live Voice Timeout (milliseconds): To configure the value for the timer. The default value is 1800 milliseconds. The combined value of the Start of Voice Timeout (milliseconds) and Live Voice Timeout (milliseconds) cannot be more than the CCA Timeout value. For example, if you specify a value for CCA Timeout as 20000 milliseconds, and the Start of Voice Timeout (milliseconds) as 13000 milliseconds, then specify the value for Live Voice Timeout (milliseconds) as 7000 milliseconds or less. Also, if you specify the value of Live Voice Timeout (milliseconds) as 20000 milliseconds, then specify the value for Start of Voice Timeout (milliseconds) as 0. For more information about the timers, see the POM Driver application description in shipped applications on page 663. Ensure you configure the Cut Through and Max Voice values under Call Progress by navigating to System Configuration > MPP Servers > VoIP Settings in Avaya Experience Portal. The values must be within Live Voice Timeout (milliseconds) so that MPP can classify the call as Live Voice or Answer Machine. For example, you can configure the values as follows:

Table continues...

Field or Button	Description	
	Parameter	Value (in milliseconds)
	Cut Through	
	Initial	1100
	Short	700
	Long	1100
	Max Voice	
	Initial	2500
	Short	2500
	Long	2500

Additional Parameter tab

Field or Button	Description
Recorder Attributes for Event Attributes	
Send attributes to Event SDK Recorder	Enable this option if you want to send the attributes selected in the Select Attributes field to the EventSDK and call recorder API.
Select Attributes	Select the attributes you want to send to the EventSDK and call recorder API after processing each call. The call recorder application uses these attributes to name and tag the files that are generated for each recorded call. For the EventSDK and call recorder API, you can select maximum 20 attributes. If you are using Avaya Experience Platform™ Workforce Engagement as the recorder application, you can select maximum 10 attributes. The Select Attributes field is displayed only if you enable the Send attributes to Event SDK Recorder option.
Publish	
Publish Attempt Data To Context Store	Enable this option if you want to publish the contact attempt data to the Context Store.
Pass Data in External Transfer	

Table continues...

Field or Button	Description
Select Data	Select the parameter you want to pass as user-to-user (UI) information to an external agent when a call is conferenced or transferred to the external agent. If you select ContextStoreID, then when an agent conferences or transfers the call to an external agent, POM passes the context store ID of the customer to CCElite Workspace or other third-party agent desktop application. POM updates the Context Store with the current customer call information. Select this option if POM is configured to connect to the Context Store. If you select UserContactID, then when an agent conferences or transfers the call to an external agent, POM passes the user ID and contact list ID of the customer to CCElite Workspace or other third-party agent desktop application. If you do not select any value in this field, the Pass Data in External Transfer feature is disabled.
Agent Address Book	
Select Agent Address Books	Select the agent address books you want to assign to the campaign. The addresses in the address books are available to the agents through the Agent Desktop during transfer and conference with external parties.
Nuisance Rate Calculation	
AMD False Positive Rate	Specify the Answer Machine Detection (AMD) False Positive Rate, in percentage, to calculate the nuisance rate. False positives are live recipients of a call that are mistakenly identified as answering machines. Therefore, an answering machine message is played or the call is hung up depending on the prevailing strategy to manage answer machines. POM considers such calls as nuisance calls along with the abandoned calls. Hence, an estimate is required to include such calls in the abandoned rate calculation. Minimum and maximum values are 0 and 10, respectively.

Table continues...

Field or Button	Description
Consider answer machine by Agent	Enable this option if POM must consider completion codes classified as Answer Machine by Agent in the Nuisance rate calculation. For calls which are answered by an answering machine but falsely detected as live voice calls, and are therefore, connected to the agent, the agent must mark such calls with Answer Machine by Agent completion code. When the Consider answer machine by Agent option is enabled, such calls are considered in the Nuisance rate calculations. Administrator must enable the Answer Machine by Agent option for the relevant completion codes on the Completion Code Association page.
External Selection	
External Selection	Select this check box if an external system is integrated with POM to determine the customer call and agent pairing, and you want to enable the External Selection feature for the campaign. POM sends the contact attributes you select in the External Selection Attributes field in a selection request to the external system. The external system determines the customer call and agent pairing based on these contact attributes. Ensure that the External Selection option is enabled in Global Configuration.
Select External Selection	Select the contact attributes you want to send in a selection request to the external system. This field displays the attributes of the contact list you associate with the campaign. For an infinite campaign configured without a contact list, this field displays all attributes configured in POM. You can select maximum five contact attributes. This field is displayed only if you select the External Selection check box.

Table continues...

Field or Button	Description
Failsafe Timer (milliseconds)	Type the time (in milliseconds) for which POM must wait for the external system to respond to the selection request sent by POM. The default failsafe time is 100 milliseconds. The minimum and maximum values you can configure are 20 to 500 milliseconds respectively. If the external system does not respond to the selection request within the specified time, POM performs the agent and customer call pairing. This field is displayed only if you select the External Selection check box.
Save	Click to save the changes.

Attribute availability in each POM install mode for configuring attribute-based or agent ID-based record assignment

The following table provides information about the contact attributes available on the Campaign Creation page in each POM install mode for configuring attribute-based or agent ID-based record assignment:

POM installation mode	Available attributes for the Record assignment based on the attributes	Available attributes for the Record assignment based on the Agent ID
For Finite/ infinite with contact list attribute selection:		
CC Elite	Common attributes between, multiple contact lists selected for a campaign and attributes configured on the CC Elite Configurations page.	All the common attributes of a selected contact list on the Campaign Creation page.
AACC	-	All the common attributes of a selected contact list on the Campaign Creation page.
Oceana	All the common attributes from the multiple selected contact lists.	All the common attributes of a selected contact list on the Campaign Creation page.
For Finite/ infinite with contact list attribute selection:		
CC Elite	Common attributes between all the POM attributes and the attributes configured on the CC Elite Configurations page.	All POM attributes.
AACC	-	All POM attributes.
Oceana	All POM attributes.	All POM attributes.

Campaign Manager page field descriptions

Field or Button	Description
New Campaign	Click to add a new campaign.
Search Campaign	Use this field to search a campaign.
Filter 	Click to perform advanced search. The following fields are displayed when you click Filter : • Column Name • Operator • Search Text
Column Name	Select the column name based on which you want to perform the advanced search. The following are the options: • Name • Contact List • Campaign Strategy
Operator	Click the operator you want to use to perform the advanced search. The following are the options: • Equal to (=) • Not Equal to (!=) • in • like • not like
Search Text	Type the text you want to search.
Refresh 	Click to clear the search.

Field or Button	Description
Actions 	The following are the options: • Run Now: To run the campaign. For more information, see Running a campaign on page 126. • Stop: To stop a campaign. The Stop option is available for all campaigns that are in the running state. After you click the Stop option, POM requires time to stop campaign. Therefore, refresh the Campaign Manager page to see the latest state of the campaign. Else, use the Supervisor Dashboard to see the latest state of all campaigns at real-time. For more information, see Stopping a campaign on page 127 • Edit: To edit the campaign. The Edit option is unavailable if the campaign is in a running or callback state. For more information, see Editing a campaign on page 130. • Schedule: To schedule the campaign. For more information, see Scheduling a campaign on page 122. • Campaign Summary: To view the campaign summary. For more information, see Viewing campaign summary on page 125. • Rule Association: To associate rules with the campaign. For more information, see Associating and disassociating rules with a campaign on page 120. • Holiday Association: To associate holidays with the campaign. For more information, see Associating and disassociating holidays with a campaign on page 119. • Campaign Linking: To link a campaign to this campaign so that when this campaign stops, the linked campaign starts. You can link one campaign of the same organization to this campaign. For more information, see Configuring campaign linking on page 119. • Save As: To create a copy of the campaign. For more information, see Creating a copy of a campaign on page 127. • Export Files: To view and download the export files of the campaign. For more information, see Downloading the files exported from a campaign on page 128. • Delete: To delete the campaign. You cannot delete the campaign if the campaign is in an In Progress state. For more information, see Deleting a campaign on page 130.
Name	Displays the name of the campaign.

Table continues...

Field or Button	Description
Contact List - Filter Template	Displays the name of the contact list associated with the campaign and the filter template associated with the contact list. If two or more contact lists are associated with the campaign, > is displayed corresponding to the contact list and filter template name. You can click > to view all contact lists and filter templates associated with the campaign.
Type	Displays the campaign type, that is, Finite or Infinite.
Organization	Displays the name of the organization. POM does not display this column by default. If you want to display the column, you must select the Organization check box on the ✓. The Organization column is visible only to Non-Org users.
Campaign Strategy	Displays the name of the campaign strategy associated with the campaign. You can click the campaign strategy name to view the summary of the campaign strategy.
Last Executed	Displays the timestamp of the last job instance run for the campaign. A job is an instance of a campaign. If the job is running, the Last Executed status is In Progress. For campaigns that were never run, the Last Executed status is (-). If the job status is In Progress, you can pause, resume, or stop the campaign from the Supervisor Dashboard. An In Progress status means the campaign job can be in any one of the following states: Running, Pausing, Paused, Callback, or Stopping. If you stop a campaign, then till the campaign stops, this field displays the current state of the job such as Stop, Stopping, Stopped, Creating History, Callback, or Completed. Refresh the page to see the current state of the job.
Waiting Callbacks	Displays the total number of callbacks that are in the <code>Waiting for Job</code> state for the campaign.

Contact list and filter template association for a campaign

You can configure the following in a campaign:

- Add one or more contact lists to the campaign.
- Associate a filter template to a contact list.
- Set the dialing allocation percentage for the contact lists.
- Set the priority of the contact list according to the order specified.
- Preview the filtered contacts from a contact list.

Associating a filter template to a contact list filters the contacts in the contact list based on the filter conditions configured in the filter template. The filtered contacts are then sorted according to the sort conditions configured in the filter template.

The attributes present in filter template must be part of the contact list to which the filter template is associated. Associating a filter template to a contact list is optional. If you do not associate a filter template to a contact list, POM selects all the records of the contact list.

You can add a maximum of 50 contact lists to the campaign.

You can associate only one filter template to a contact list. However, you can associate the same filter template to multiple contact lists.

For an attribute-based campaign, ensure that the filter template you associate to the contact list of the campaign does not contain sort condition attributes that are already configured as attributes for attribute-based dialing on the Campaign Creation page of the campaign. This is because POM, by default, sorts the filtered contacts based on the attribute-based dialing attributes.

An attribute-based campaign is a campaign for which the **Contact Assignment to Agent** option is set to either **Attributes** or **Agent ID** or both on the Campaign Creation page.

For example, if the Age and City attributes are configured for attribute-based dialing on the Campaign Creation page of a campaign, and if Name and ID sort condition attributes are configured in the filter template that is associated with contact list of the campaign, then POM sorts the filtered contacts for dialing based on Age, City, Name, and ID.

Dialing Allocation Percent

You can specify a dialing allocation percentage for each contact list associated with a campaign.

For example, consider a dialing cycle of 100 contacts. If a contact list is given 50 percent dialing allocation, then 50 out of 100 contacts are dialed from that contact list in each dialing cycle.

You can do any one of the following:

- Allocate 100 percent to each contact list of the campaign.
- If you are allocating less than 100 percent to any of the contact lists of the campaign, ensure that the total dialing allocation for all contact lists of the campaign is 100 percent.

For example, if a campaign has three contact lists, you can allocate 50 percent to the first contact list and 25 percent each to the remaining two contact lists.

If you set the dialing allocation to 100 percent for a contact list, POM dials all the filtered contacts from that contact list before moving to another contact list. If you set the dialing allocation to 100 percent for each contact list, POM picks up the contact lists for dialing in the order in which these contact lists appear in the **Contact List and Filter Template Association** area of the Campaign Creation page.

Priority of the contact list is according to the contact list order and the dialing allocation. If multiple contact lists have the same dialing allocation, the contact list priority is according to the order in which these contact lists appear in the **Contact List and Filter Template Association** area of the Campaign Creation page. While calculating the percentage of dialing allocation, POM counts only the unique attempts. POM does not count system retries or callbacks.

You can also select the **No Dialing allocation** check box to disable dialing based on the dialing allocation and contact list priority.

If you select the **No Dialing allocation** check box, POM allocates 100% dialing allocation to each contact list of the campaign.

The campaign reports specify the order in which the records are disposed. The disposition and sequence of the records are different than the dialing of the records.

Dialing Cycle

Dialing cycle is the total number of contact lists with non-zero and non-hundred dialing allocation multiplied by five.

For example, consider the dialing allocation for the following contact lists:

- List 1 - 50%
- List 2 - 30%
- List 3 - 20%
- List 4 - 100%

In the preceding example, the total number of contact lists with non-zero and non-hundred dialing allocation is 3.

Hence, according to the formula, dialing cycle = 3 (total number of non-zero and non-hundred contact lists) multiplied by 5, which is equal to 15.

Therefore, the dialing cycle count calculated is 15.

List 1 has 50% dialing allocation. Hence, 50% from the 15 records, that is, 7 contacts are picked for dialing from list 1.

List 2 has 30% dialing allocation. Hence, 4 contacts from list 2 are picked for dialing. The remaining 20%, that is, 3 contacts from list 3 are picked for dialing.

In total, 7 contacts (from list 1) + 4 contacts (from list 2) + 3 contacts (from list 3) = 14 contacts are picked and dialed in every dialing cycle.

Related links

[Dialing allocation considerations](#) on page 109

Dialing allocation considerations

Considerations	Description
Dialing allocation is 100 percent for a contact list.	If the dialing allocation is 100 percent, POM dials all the contacts from the contact list before moving to the next contact list. A contact list having 100 percent dialing allocation is considered by POM first, regardless of the order in which these contact lists appear on the Contact and filter Template Association page. If there are multiple contact lists having 100 percent allocation, POM selects each contact list based on the order in which these contact lists appear on the Contact and filter Template Association page.

Table continues...

Considerations	Description
Dialing allocation is less than 100 percent for contact lists.	For contact lists having less than 100 percent dialing allocation, POM picks up the contact list based on the dialing allocation and the order in which these contact lists appear on the Contact and filter Template Association page. Example 1: Consider the following dialing allocation in the specified order, where each contact list contains 100 contacts: 1. Contact list 1 with Filter template 1 and dialing allocation 40 percent. 2. Contact list 2 with Filter template 1 and dialing allocation 50 percent. 3. Contact list 3 with Filter template 1 and dialing allocation 10 percent. In example 1, the order of dialing is contact list 1, contact list 2, and contact list 3 sequentially. When POM selects contact list 1 for dialing, POM dials 40 contacts out of 100 contacts because the dialing allocation is 40 percent. Similarly, POM dials 50 contacts from contact list 2 and 10 contacts from contact list 3. Example 2: Consider the following dialing allocation in the specified order, where each contact list contains 100 contacts: 1. Contact list 1 with Filter template 1 and dialing allocation 40 percent. 2. Contact list 2 with Filter template 1 and dialing allocation 50 percent. 3. Contact list 3 with Filter template 1 and dialing allocation 10 percent. 4. Contact list 4 with Filter template 1 and dialing allocation 100 percent. 5. Contact list 5 with Filter template 1 and dialing allocation 100 percent. In example 2, POM selects both contact list 4 and 5 respectively having 100 percent dialing allocation. POM first dials all the filtered contacts from contact list 4, and then dials all the filtered contacts from contact list 5.

Table continues...

Considerations	Description
	POM then selects all remaining contact lists with non-hundred allocation.
Dialing allocation is zero percent for a contact list.	If the dialing allocation is zero percent for a contact list, POM does not dial any contact from the contact list. After the contact list with zero dialing allocation is processed, POM selects the next contact list for dialing. You can change the dialing allocation of a contact list to a non-zero value at run time.

Related links

[Contact list and filter template association for a campaign](#) on page 107

Advanced guard time with follow-the-sun dialing

You can specify phone attributes in the **Time Zone Phone Attributes** field on the Campaign Creation page to configure the follow-the-sun dialing feature.

POM picks up a record for dialing from the operational database only when the guard time of at least one of these phone attributes is open for dialing. Thus, reducing the possibility of the records getting restricted during actual dialing.

You can specify a maximum of five phone attributes in the **Time Zone Phone Attributes** field even if more phone attributes are configured in the campaign strategy. Hence, you can restrict the number of phone attributes to five or less on which POM must perform guard time validation before it picks up the records for dialing from the operational database.

In addition, you can also enable the following options on the Campaign Creation page:

- **User Preferred Time:** To use the values from the following attributes of a phone attribute for determining the guard time of the phone attribute:
 - Phone Allowed Time: Use this attribute if your customer permits you to call on a specific phone number only during specific hours and days of the week.
 - Phone Disallowed Time: Use this attribute if your customer does not want to be called on a specific phone number during specific hours and days of the week.
- **Timezone of Zipcode:** To use the zip code-based guard time of a record for determining the guard time of each phone attribute.

A record can have multiple zip codes. You can add a maximum of two zip codes for a record in POM. For example, a customer's office and home are located in different cities or states with different zip codes and time zones. Hence, the guard times of these two locations can differ.

For example, the guard time of the primary zip code can be from 10:00 to 13:00, and secondary zip code can be from 12:00 to 15:00.

If you enable the **User Preferred Time** and **Timezone of Zipcode** options, POM determines the intersecting time between the guard time of a phone attribute, user preferred time, and zip code-based guard time as the final guard time for the phone attribute.

+ Tip:

To pick up those phone attributes for dialing first whose time zone closes first, configure a sort condition for the `<Phone attribute name> Time Zone` attribute in the filter template that is associated with the contact lists of the campaign and specify the sort order as Descending.

*** Note:**

- The follow-the-sun dialing feature is applicable only to the Call task nodes of a campaign. For other task nodes, such as, Mail and SMS, POM picks up the filtered records for an attempt without validating their guard time.
- The following configurations affect the time required for filtering the records:
 - The number of phone attributes selected in the **Time Zone Phone Attributes** field.
 - Whether **User Preferred Time** is enabled. If enabled, the number of allowed and disallowed times per day configured in the Phone Allowed Time and Phone Disallowed Time attributes of each phone attribute.
 - Whether **Timezone of Zipcode** is enabled.

After you run the campaign, an authorized user can use the Supervisor Dashboard to view the time zone-wise distribution of the records in real time. The user can use the record distribution data to make real-time decisions for a campaign.

For example, the user can decide the number of agents to allocate for outbound activities based on the number of yet to be dialed records for a time zone and whether the time zone is open for dialing.

For more information about the follow-the-sun dialing feature and how POM determines an intersecting guard time, see *Avaya Proactive Outreach Manager Overview and Specification*.

Prerequisites for configuring advanced guard time with follow-the-sun dialing feature

Perform the following prerequisites for the advanced guard time with the follow-the-sun dialing feature:

- Enable the **Guard Times** option in the Call task node of the campaign strategy.
- Select the **Enable Advanced Guard Time Configuration** check box in Global Configuration.

*** Note:**

After you enable **Enable Advanced Guard Time Configuration**, you must clear all contact lists and reimport them to populate the phone attribute values, such as time zone, state, and wireless according to the changed mapping.

- At the command prompt of each POM server, run the following command and allocate 5 GB of memory to the Campaign Manager service:

```
updateCampaignManagerMemory.sh
```

Checklist for configuring the advanced guard time with follow-the-sun dialing feature

Do the following before configuring the advanced guard time with the follow-the-sun dialing feature:

- Perform the prerequisites for the advanced guard time with the follow-the-sun dialing feature.

For more information, see [Prerequisites for configuring advanced guard time with follow-the-sun dialing feature](#) on page 112.

- If POM is upgraded from a previous version to version 4.0.2, update the .csv file and data source that contain the contact data with the attributes mentioned in this checklist.

For example, *<phone attribute name>_allowedtime*, *<phone attribute name>_disallowedtime*, *zipcodepredefined*, *zipcodetzpredefined*, *zipcodestatepredefined*, and *countrypredefined*.

You must then reimport the contact data from the .csv file or data source into the contact lists of the campaign. For contacts that are manually added to the contact list, manually add the data for these attributes in each contact.

The following checklist provides the tasks to perform for configuring the advanced guard time with the follow-the-sun dialing feature:

No.	Task	Related topics	Notes	✓
1	Configure the following on the Campaign Creation page: • Time Zone Phone Attributes: Select the phone attributes on which POM must perform guard time validation before picking up the records for dialing from the operational database. • User Preferred Time: Enable this option to use the values from the Phone Allowed Time and Phone Disallowed Time attributes for determining the guard time of each phone attribute of a record. • Timezone of Zipcode: Enable this option to use the zip code-based guard time of a record for determining the guard time of each phone attribute of a record.	• New / Edit Campaign page field descriptions on page 78 • For information about how POM determines a guard time for each phone attribute based on this configuration, see <i>Avaya Proactive Outreach Manager Overview and Specification</i>		

Table continues...

No.	Task	Related topics	Notes	✓
2	If you enable User Preferred Time on the Campaign Creation, associate the following attributes of each phone attribute to the contact lists of the campaign. Also, ensure that these attributes contain data in the predefined format. • <i><Phone attribute name> Allowed Time</i> • <i><Phone attribute name> Disallowed Time</i>	• Associating attributes with a contact list on page 387 • For information about the predefined data format for the <i><Phone attribute name> Allowed Time</i> and <i><Phone attribute name> Disallowed Time</i> attributes, see Overview on page 409		

Table continues...

No.	Task	Related topics	Notes	✓
3	If you enable Timezone of Zipcode on the Campaign Creation, associate the following attributes to the contact lists of the campaign. Also, ensure the following attributes contain the required data: • Zipcode Predefined • Zipcode Time Zone Predefined • Zipcode State Predefined • Zipcode1 Predefined • Zipcode1 Time Zone Predefined • Zipcode1 State Predefined • Country Predefined Ensure the country names in the Country Predefined attribute are in the following format: - Australia - Brazil - Chile - China - France - Germany - Guam - India - Ireland - Italy - Japan - Korea_South - Mexico - Russia_And_Kazakhstan - South_Africa - United_Kingdom - USA_And_Canada For user-defined countries added in POM, ensure that the country names in the	• Associating attributes with a contact list on page 387 • For information about attributes, see Overview on page 409		

Table continues...

No.	Task	Related topics	Notes	✓
	Country Predefined attribute match the country names in POM. Associate Zipcode1 only if you want to use a secondary zip code to determine the zip code-based guard time.			
4	To pick up those phone attributes for dialing first whose time zone closes first, configure a sort condition for the <code><Phone attribute name> Time Zone</code> attribute in the filter template that is associated with the contact lists of the campaign. Specify the sort order as Descending. You can configure a sort condition for the <code><Phone attribute name> Time Zone</code> attribute of each phone attribute selected in the Time Zone Phone Attributes field.  Note: This is an optional configuration. If you do not perform this configuration, POM picks up the records for dialing when their guard time is open. However, POM does not consider the order in which the time zones of the phone attributes close when picking up the records.	New / Edit Filter Template page field descriptions on page 316		

 Note:

If you edit the guard time of the state or time zone, default time zone of the country, or default guard time of the country after enabling the follow-the-sun dialing feature, you must restart the Campaign Manager service on all POM servers for the changes to take effect.

For more information, see [Manage Area Codes and Guard Times](#) on page 618.

Campaign linking overview

Use the Campaign Linking feature to link a campaign to another campaign.

For example, consider two campaigns: Campaign A and Campaign B. Campaign B is linked to Campaign A. Hence, Campaign A is called the base campaign and Campaign B is called the linked campaign. The campaign linking is denoted as $A \rightarrow B$.

The Campaign Linking feature automatically starts the linked campaign when one of the following criteria is met:

- The base campaign stops.
- The base campaign attains the callback state.

- The base campaign attains the stopped callback state.
- The base campaign does not have any contacts that are yet to be dialed.

Consider the following campaigns:

- Campaign A
- Campaign B
- Campaign C
- Campaign D

When all these campaigns are linked to form a chain, it is called a campaign link chain. The campaign link chain is denoted as $A \rightarrow B \rightarrow C \rightarrow D$.

In this chain:

- Campaign A is the base campaign of Campaign B, and Campaign B is the linked campaign of Campaign A.
- Campaign B is the base campaign of Campaign C, and Campaign C is the linked campaign of Campaign B.
- Campaign C is the base campaign of Campaign D, and Campaign D is the linked campaign of Campaign C.

If a campaign in a campaign link chain fails to start because of a resource or configuration problem, it cannot trigger its linked campaign. This causes an interruption in starting the campaigns in the chain.

When the last campaign of a campaign link chain is linked to the first campaign, it is called a campaign link chain cycle. The campaign link chain cycle is denoted as $A \rightarrow B \rightarrow C \rightarrow D \rightarrow A$.

Important:

Ensure that you configure the campaign link chain cycle properly. An incorrect configuration results in starting and stopping of all campaigns in the cycle. This requires manual intervention and reconfiguration.

Related links

[Campaign linking considerations](#) on page 117

[Configuring campaign linking](#) on page 119

Campaign linking considerations

Refer to the following considerations for linking campaigns:

Consideration	Description
Campaign deletion	• When you delete a base campaign, its linked campaign is not deleted. • When you delete a linked campaign, the linked campaign is removed from the base campaign.

Table continues...

Consideration	Description
Infinite campaigns	You can configure a linked campaign for an infinite campaign. For an infinite campaign, when yet to dial records becomes 0, the linked campaign is triggered.
Strict agent movement to linked campaigns	- To move the same set of agents to a linked campaign, the linked campaign must have the same skills as those of the agents. To ensure strict movement of agents to the linked campaign only, no other campaign must have the same skills as those of the linked campaign. Also, the agents must be assigned the skills of the linked campaign only. Consider four campaigns A, B, C, and D where the linked campaigns A → B are configured with skills A(1), B(2), C(2,3), and D(3) and Agent 1 is assigned with skills 1 and 2. For strict agent movement, where Agent 1 must move from Campaign A to Campaign B, skill 2 from campaign C must be removed so that no other campaign has the skills as those of Agent 1. It guarantees the movement of Agent 1 from Campaign A to Campaign B. If Campaign C continues to have skills 1 and 2 and Agent 2 moves to Campaign C when Campaign A stops, you can manually move Agent 1 to Campaign B. The manual movement of agent to a campaign also ensures that the agent sticks to that campaign and does not move to any other campaign based on automatic agent balancing and prioritizing features of POM . - Avoid using linked campaign for infinite campaigns because infinite campaigns are not meant to stop. If you link an infinite campaign to another finite or infinite campaign, be careful when using strict agent movement. If no other campaigns have the same skills as those of the infinite campaign and its linked campaign, the agents remain idle if the records in the infinite campaign exhaust. Also, agents cannot move to other non-linked campaigns because such campaigns do not have the skills to acquire the agents. Therefore, for best utilization of agents, you must regularly ensure that the infinite campaign has calls to dial. - If a campaign uses multi-node strategy and strict agent movement, the agents working on one of the nodes can sit idle if all contacts in that node are dialed. If you want the agents to take calls from other nodes, the agents must be assigned the skills of those nodes that are used in the campaign strategy in POM. On completion of the calls from one node, agents can take calls from the other nodes. On completion of the campaign, the linked campaign starts and the agents move to the linked campaign. The linked campaign does not start until the contacts of all nodes are dialed.

Table continues...

Consideration	Description
Stop campaign and campaign linking	To stop a campaign and restrict the start of the linked campaign, you must stop a campaign from the Supervisor Dashboard. After you stop the campaign, the Supervisor Dashboard prompts you whether to start the linked campaign. The linked campaign starts depending on what you select in the confirmation message.

Related links

[Campaign linking overview](#) on page 116

Configuring campaign linking

About this task

Use this procedure to link a campaign to a base campaign, or remove a linked campaign from a base campaign by using the Campaign Creation page.

Any changes made to the linked campaign through the Campaign Creation page does not impact a running campaign.

To change the linked campaign when the base campaign is running, use the Supervisor Dashboard.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Manager**.
3. On the Campaign Manager page, click  corresponding to the campaign and click **Campaign Linking**.
4. To link a campaign to this campaign, on the Campaign Linking page, in the **Select Campaign of the same organization to link to this campaign** field, click the campaign you want to link to this campaign.
5. To remove a linked campaign from this campaign, in the **Select Campaign of the same organization to link to this campaign** field, click **Select**.
6. Click **Save**.

Related links

[Campaign linking overview](#) on page 116

Associating and disassociating holidays with a campaign

About this task

You can associate holidays with a campaign. POM restricts outbound dialing for the campaign during the associated holidays.

You can also remove the associated holidays from a campaign.

For more information about configuring holidays in POM, see [Adding a holiday](#) on page 647.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Manager**.
3. On the Campaign Manager page, click  corresponding to the campaign and click **Holiday Association**.
The Holiday Association page is displayed.
4. To perform outbound dialing for the campaign during the associated holidays, enable the **Ignore All Holidays** option.
5. To associate a holiday with the campaign, in the **Available Holidays** area, click  corresponding to the holiday.
6. To associate all holidays with the campaign, click **Add All**.
7. To remove a specific holiday association from the campaign, in the **Selected Holidays** area, click  corresponding to the holiday.
8. To remove all holiday associations from the campaign, click **Remove All**.
9. Do one of the following:
 - Click **Apply** to save the changes and associate more holidays with the campaign.
 - Click **Save** to save the changes and close the Holiday Association page.

Associating and disassociating rules with a campaign

About this task

You can associate global-level and campaign-level rules with a campaign. You can also set an order to run the rules for the campaign.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Manager**.
3. On the Campaign Manager page, click  corresponding to the campaign and click **Rule Association**.
4. On the Rule Association page, specify the relevant details.

Related links

[Rule Association page field descriptions](#) on page 120

Rule Association page field descriptions

This page displays the global-level and campaign-level rules. The global-level rules are filtered based on the organization of a campaign. The campaign-level rules are filtered rules that you can apply to an individual campaign.

You can associate rules with a running campaign for a particular zone.

The suffix **Enabled** that appears with a rule name indicates an enabled rule. The suffix **Disabled** that appears with a rule name indicates a disabled rule.

 Note:

Ensure you click **Save** or **Apply** to apply the rule for each zone.

Field or Button	Description
Global Rule	
Use default global rule ordering	Enable this option to retain the default order for running the global rules.
Global Rule Order	Displays the order in which the global rules are run for the campaign. This area displays the global rules that are configured in POM and are associated with an organization of the campaign. You can edit the global rule order if the Use default global rule ordering option is disabled. To set a specific order for running the global rules, select a rule and drag the rule up or down in the hierarchy according to your requirements.
Campaign Rule	
Select zone associated to campaign	Click the zone associated with the campaign. The rules you associate with the campaign are applied to the selected zone.
Available Rules	Displays the campaign-level rules that are configured in POM and are associated with an organization of the campaign. To associate rules with the campaign, do any of the following: - To associate a rule with the campaign, in the Available Rules area, click  corresponding to the rule. - To associate all rules with the campaign, click Add All.

Table continues...

Field or Button	Description
Selected Rules	Displays the rules associated with the campaign. To remove the rule associations from the campaign, do any of the following: - To remove a specific rule association from the campaign, in the Selected Rules area, click  corresponding to the rule. - To remove all rule associations from the campaign, click Remove All. To set a specific order for running the campaign rules, select a rule and drag the rule up or down in the hierarchy according to your requirements.
Save	Click to save the changes and return to the Campaign Manager page.
Apply	Click to apply the changes and continue editing the rule association with the campaign.

Related links

[Associating and disassociating rules with a campaign](#) on page 120

Campaign schedule

Scheduling a campaign

About this task

You can create a schedule for a campaign for it to run at the scheduled date and time. You can also create a recurring schedule.

If there are any country-specific changes to the existing time zones, such as addition of new time zones or changes to the Daylight Savings Time (DST) rules, you must delete and re-create the schedule.

For example, Russia announced some changes to the standard time zones with effect from 26 October 2014. If any campaign schedule or data archival falls in the changed time zones, you must delete and re-create the schedules so that the campaigns and data archival continue to run correctly.

*** Note:**

- While scheduling campaigns, if the campaign schedule falls in the shift window with the Daylight Savings time (DST) clock change, the campaigns do not run.
- The scheduled activities do not run if the Campaign Director service is not running.

Procedure

- In the navigation pane, click **Proactive Outreach > Manager**.
- On the **Campaigns** menu, click **Campaign Manager**.

3. On the Campaign Manager page, click  corresponding to the campaign and click **Schedule**.
4. On the Schedule page, click **New Schedule**.
5. On the New Schedule page, add the relevant schedule details.
6. Click **Save**.

New Schedule page field descriptions

Field or Button	Description
Start Date & Time	Select the start date and time for the campaign schedule.
Time Zone	Click the time zone for the campaign. Use this field to specify the schedule start time for the specified time zone. The system converts the schedule start time to the current POM system time and runs the schedule as per the time on the POM server. The POM system scheduler honors the DST of the current POM server and not the time zone mentioned while creating the schedule.
Recurring	Enable this option to create a recurring campaign. This option is available only for finite campaigns.

Table continues...

Field or Button	Description
Frequency	Select a frequency for the recurring campaign. This field is available only if you enable the Recurring option. You can select any one of the following options: • Run Every N Minutes: This option creates a job for the campaign after every N minutes you specify. After selecting this option, you can specify the number of minutes in the Run Every (minutes) field. For example, if you specify 45 minutes, a job is created every 45 minutes. Hence, if the first job starts at 12:00 hours, the second job starts at 12:45 hours, and so on until the finish date. • Daily: This option creates a job daily at the configured start time and continues until the finish date. • Weekdays Only: This check box is displayed if you select the Daily option. Select this check box to create a job on all days of the week except the weekend days configured in Weekend days in Campaign Settings in Configurations > Global Configurations. • Weekly: This option creates weekly recurring jobs on the days you select. After you select this option, you can select the days of the week. For example, if you select Monday and Friday, the weekly jobs are created on Monday and Friday at the configured start time until the finish date. • Monthly: This option creates jobs every month depending on the start date until the finish date. • Yearly: This option creates jobs every year depending on the start date until the finish date.
Finish Date & Time	Select the date and time at which the recurring campaign schedule must end. This field is available only if you enable the Recurring option.

Schedule page field descriptions

This page shows the schedules associated with the campaign. You can create, pause, resume, and delete the schedules.

You cannot edit a campaign schedule. To make any changes to a campaign schedule, you must delete the schedule and create a new schedule.

Note:

When scheduling campaigns, if the campaign schedule falls in the shift window with the Daylight Savings Time (DST) clock change, the campaigns do not run.

Field or Button	Description
Campaign Name	Displays the name of the campaign.
New Schedule	Click to create a new schedule for the campaign.

Table continues...

Field or Button	Description
Search Schedules	Type the ID of the campaign schedule you want to search.
Filter 	Click to perform an advanced search on the campaign schedules. The following fields are displayed when you click Filter : • Column Name • Operator • Search Text
Column Name	Click ID to perform the advanced search based on the ID of the campaign schedule.
Operator	Click the operator you want to use to perform the advanced search. The following are the options: • Equal to (=) • Not Equal to (!=) • like • not like
Search Text	Type the value you want to use with the corresponding column name and operator to filter the campaign schedules.
Refresh 	Click to clear the search.

Field or Button	Description
ID	Displays the campaign schedule ID.
Frequency	Displays the frequency of the campaign, that is, recurring or non-recurring.
Start Time	Displays the start time of the campaign schedule.
End Time	Displays the end time of the campaign schedule.
Status	Displays the following: • Running : Indicates that the campaign schedule is running. • Paused : Indicates that the campaign schedule is paused.
Actions 	You can click any of the following options: • Pause: To pause the campaign schedule. • Resume: To resume the campaign schedule. • Delete : To delete the campaign schedule.

Viewing campaign summary

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Manager**.

- On the Campaign Manager page, click  corresponding to the campaign and click **Campaign Summary**.

The Campaign Summary page displays the summary of the campaign.

Related links

[Campaign Summary page field descriptions](#) on page 126

Campaign Summary page field descriptions

Field or Button	Description
Campaign Details	
Name	Displays the name of the campaign.
Campaign Type	Displays the campaign type, Finite or Infinite.
Description	Displays the description of the campaign.
Dialing Order	Displays the dialing order of the priority, retry, and regular records of the campaign.
Campaign Strategy	Displays the strategy associated with the campaign.
Zone	Displays the zone associated with the campaign.
Filter Template Association	
Contact List	Displays the contact lists associated with the campaign.
Filter Template	Displays the filter template associated with the contact list. If you do not associate a filter template with the contact list, this field displays '-'.
Dialing Allocation Percent	Displays the dialing allocation percentage of the contact list.

Related links

[Viewing campaign summary](#) on page 125

Running a campaign

About this task

A campaign can send notifications to the contact records by placing a call, sending an email, or sending an SMS.

A job is a running instance of the campaign. A recurring campaign creates multiple jobs for that campaign until the campaign schedule is terminated. You can run campaigns once or multiple times. You can also schedule the campaigns to run once or multiple times.

Note:

You can run only one job at a time for a campaign.

In POM systems dedicated for Manual dialing, you can run only manual and email campaigns.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Manager**.
3. On the Campaign Manager page, click  corresponding to the campaign and click **Run Now**.

The following message is displayed:

```
Job has been created for campaign "<campaign name>".
```

If the dialing configuration is corrupted, the following error message is displayed:

```
Error in running campaign job. Found corrupted dialing mode configuration.
```

If you try to run non-supported campaigns, such as preview, predictive, notification, or SMS campaign, in non-telephony mode, the following error message is displayed:

```
Only manual or email campaign jobs can  
run as system is configured in non-telephony mode
```

Stopping a campaign

About this task

Use this procedure to stop a finite or an infinite campaign that is in the running state.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Manager**.
3. On the Campaign Manager page, click  corresponding to the campaign and click **Stop**.
4. In the Confirming Stop dialog box, click **Stop**.

POM displays the following notification:

```
Campaign stop request has been sent successfully for xxx, where xxx is  
the name of the campaign.
```

If the campaign links to another campaign, POM displays an option whether you want to stop the linked campaign or not.

After you click the **Stop** option, POM requires time to stop campaign. Therefore, refresh the Campaign Manager page to see the latest state of the campaign. Else, use the Supervisor Dashboard to see the latest state of all campaigns at real-time.

Creating a copy of a campaign

About this task

Use this procedure to create a copy of an existing campaign.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Manager**.
3. On the Campaign Manager page, click  corresponding to the campaign and click **Save As**.
4. On the Save Campaign As page, in the **New Name** field, type a name with which you want to create a copy of the existing campaign.

The maximum allowed length is 80 characters.

Campaign name cannot contain the following special characters: space and {, (, @, ~, `, !, ', :, ,, #, \, \$, %, &, ?, ", <, >,), }

5. Click **Save**.

Exporting completion codes to the campaign export .csv file

About this task

When configuring campaign export on the Campaign Creation page, you can specify the system and custom completion codes based on which you want to export the successfully attempted contacts data from a campaign to a .csv file.

If you also want to export these completion codes to the .csv file, set the `USE_CC_CODE` parameter to true.

If you set the `USE_CC_CODE` parameter to false, POM exports the description of the completion codes to the .csv file.

By default, the `USE_CC_CODE` parameter is set to true.

Procedure

On the command prompt of the primary POM server, do one of the following:

- To export the completion codes to the campaign export .csv file, run the following command:
- To export the description of the completion codes to the campaign export .csv file, run the following command:

```
$POM_HOME/bin/SetConfigValue.sh USE_CC_CODE true
```

```
$POM_HOME/bin/SetConfigValue.sh USE_CC_CODE false
```

Downloading the files exported from a campaign

About this task

Use this procedure to download the .csv files containing the attempted contacts data from a campaign.

POM exports the .csv files from a campaign only if you enable the **Export Data** option and configure the export-related options on the Campaign Creation page.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Manager**.
3. On the Campaign Manager page, click  corresponding to the campaign and click **Export Files**.
4. Download the .csv files from the Campaign Export Files page.

Related links

[Campaign Export Files page field descriptions](#) on page 129

Campaign Export Files page field descriptions

Use this page to view and download the .csv files containing the successfully attempted contacts data from a campaign.

Field or Button	Description
Campaign Name	Displays the name of the campaign.
Search Export File	Type the search criteria for searching the export file.
Filter 	Click to perform an advanced search on the export files.
Column Name	Click the column name based on which you want to perform the advanced search. The following are the options: • Name: To filter an export file by its name • Creation Time: To filter an export file by its creation time • Size (KB): To filter an export file by its file size (in KB)
Operator	Click the operator you want to use to perform the advanced search. If you click Name in the Column Name field, the following operators are available: • Equal to (=) • like If you click Creation Time in the Column Name field, the Start Date & Time and End Date & Time fields are displayed. If you click Size (KB) in the Column Name field, the following operators are available: • Equal to (=) • Less than (<) • Greater than (>)
Search Text	Type the value you want to use with the corresponding column name and operator to filter the export files. This field is displayed if you select Name or Size (KB) in the Column Name field.

Table continues...

Field or Button	Description
Start Date & Time	Click the start date and time to filter the export files created on or after the start date and time. This field is displayed if you click Creation Time in the Column Name field.
End Date & Time	Click the end date and time to filter the export files created on or before the end date and time. This field is displayed if you click Creation Time in the Column Name field.
Refresh 	Click to clear the search.

Field or Button	Description
Name	Displays the name of the export file.
Creation Time	Displays the time at which the export file is created.
Size (KB)	Displays the size (in KB) of the export file.
Action	Click Export File  to download the file. The Export File option is unavailable if the file size is 0 KB, 50000 KB (50 MB), or more than 50 MB.

Related links

[Downloading the files exported from a campaign](#) on page 128

Editing a campaign

About this task

You cannot edit a campaign that is in a running or callback state.

You cannot edit the campaign name.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Manager**.
3. On the Campaign Manager page, click  corresponding to the campaign and click **Edit**.
4. On the *<campaign name>* page, do the modifications.
5. Click **Save**.

Deleting a campaign

About this task

When you delete a campaign, POM deletes all historic data associated with the campaign from the POM database. Depending on the size of the historic data, campaign deletion takes some time. During this time, the campaign is in a Deleting state. While the campaign is being deleted, you cannot perform any action on it. To ensure the deletion activity is complete, refresh the page manually.

Delete a campaign during a maintenance window when no other job is running. If you are deleting a campaign on MSSQL database, and if the database is set to Full Recovery Model, the database transaction log might increase unexpectedly. If the transaction log is full, the following exception is logged in the PIM_CmpDir.log and PIM_CmpMgr.log files:

```
com.microsoft.sqlserver.jdbc.SQLServerException: The transaction log
for database <DBNAME> is full due to 'ACTIVE_TRANSACTION'.
```

For more information about Recovery Model and transaction log management, see the Microsoft SQL server documentation or consult a qualified database administrator.

You cannot delete a campaign if the campaign is in an In Progress state.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Manager**.
3. On the Campaign Manager page, click  corresponding to the campaign and click **Delete**.
4. On the confirmation message, click **Delete**.

Two-way SMS and email campaigns

Two-way SMS and email campaigns overview

In addition to creating voice, SMS, email campaigns, you can also create two-way SMS and email campaigns. These campaigns help you to send and receive responses and you can then take appropriate actions based on different conditions. You must make appropriate changes or create campaign strategies in a specific manner to use two-way SMS and email campaigns. POM uses web services to enable the two-way communication. POM provides stock applications for both SMS and email. The applications receive SMS and email responses and then update the attribute value and completion code for a specific POM contact.

Campaign strategy-related changes for two-way SMS and email campaigns

To use the functionality of POM to send and receive SMS and email, use the SMS and Mail task nodes and select the POM shipped application, that is, AvayaPOMSMS or AvayaPOMEmail, in the property. Add an Avaya Notify child node under the Application node.

If you have your own custom SMS or email application, use the Custom task node under the SMS or Mail task node, and then specify the name of the application. For SMS campaigns, you see only the SMS-related applications under the Custom task node. For email campaigns, you see only email-related applications under the Custom task node. You can also use the Selector node to help POM take decisions based on the response to the SMS or email campaigns.

Note:

You must configure the SMS and email applications before creating a campaign strategy.

Configuring the SMS delivery and CAV for two-way SMS campaigns

Procedure

1. In the left pane, click **System Configuration > Applications**.

2. On the Applications page, click **Add**.
3. On the Add Application page, in the **Start With** field, click **AvayaPOMSMS**.
4. Ensure the **Message Type** for the SMS application is **Regular** and **Delivery**.
5. Ensure the application type is Inbound with a valid short code number associated with the application.
6. Specify the URL as *https://<application server ip>:port-number-configured-onpom-server/<AvayaPOMSMS>/Start Application Type=SMS, Inbound Type*
7. In **Notification Enabled**, click **Yes** and specify the notification URL.
The notification URL and the application URL must be the same.
8. Specify the following CAVs for the SMS applications:
 - a. Web Service IP Address or FQDN (IP address where the POM web service is located)
 - b. Completion Code (the completion code to update on receiving an SMS response)
 - c. Attribute name (the attribute name to update on receiving an SMS response)
 - d. Campaign Name (the name of the campaign in which the application is used)
 - e. SMS Dialing Code to Ignore (the phone or SMS prefix added by an operator or POM respectively)

Configuring custom SMS application

You can configure a custom application to handle the SMS notifications and delivery.

Procedure

1. Add the custom application through EPM by doing the following:
 - a. In the left pane, click **System Configuration > Applications**, and click **Add**.
 - b. Specify a name for the custom application, and select the **Type** as SMS, and click **Continue**.
 - c. Specify the **Message Type** as Regular.
 - d. Specify the URL as *https://<application server ip>:port-number-configured-on-application-server/AvayaPOMSMS/Start Application Type = SMS, Inbound Type*
 - e. In **Notification Enabled**, click **Yes**.
 - f. Specify the notification URL with the web service IP address as *http://<application server IP>:port-number-configured-on-application-server/AvayaPOMSMS/Start?WebServiceIP=<web service IP address>*.
 - g. Click **Save**.
2. In the left pane, click **System Configuration > Applications**.
3. Select the AvayaPOMSMS POM shipped application for SMS.
4. Change the **Message Type** as Delivery.

5. Ensure that the application type is Inbound with a valid short code number associated with the application.
6. Click **Save**.
7. Edit the Configurable Application Values (CAV) for the AvayaPOMSMS POM shipped application, and delete the web service IP address.
8. Click **Apply** and click **Save**.

Configuring the email delivery and CAV for two-way email campaigns

Procedure

1. In the left pane, click **System Configuration > Applications**.
2. On the Applications page, click **Add**.
3. On the Add Application page, in the **Start With** field, click **AvayaPOMEmail**.
4. Ensure the **Message Type** for the email application is **Regular** and **Delivery**.
5. Ensure the application type is Inbound and specify the appropriate launch parameters for the email application.
6. Specify the URL as *https://<application server ip>:port-number-configured-on-application-server/AvayaPOMEmail/Start* Application Type = Email, Inbound Type
7. In **Notification Enabled**, click **Yes** and specify the notification URL.
The notification URL and the application URL must be the same.
8. Specify the following CAVs for the email applications:
 - a. Web Service IP Address or FQDN (IP address where the POM web service is located)
 - b. Completion Code (the completion code to update on receiving an email response)
 - c. Body Attribute Name (the contact list attribute in which the email body of the receiving email is stored)
 - d. Subject Attribute Name (the contact list attribute in which the subject of the receiving email is stored)
 - e. Campaign Name (the name of the campaign in which the application is used)

Configuring custom email application

You can configure a custom application to handle the email notifications and delivery.

Procedure

1. Add the custom application through EPM by doing the following:
 - a. In the left pane, click **System Configuration > Applications**, and click **Add**.
 - b. Specify a name for the custom application, select the **Type** as Email, and click **Continue**.
 - c. Specify the **Message Type** as Regular.

- d. Specify the URL as *https://<application server ip>:port-number-configured-on-application-server/AvayaPOMEmail/Start* Application Type = Email, Inbound Type
 - e. In **Notification Enabled**, click **Yes**.
 - f. Specify the notification URL with the web service IP address as *http://<application server IP>:port-number-configured-on-application-server/AvayaPOMEmail/Start?WebServiceIP=<web service IP address>*.
 - g. Click **Save**.
2. In the left pane, click **System Configuration > Applications**.
 3. Select the AvayaPOMEmail POM shipped application for email.
 4. Change the **Message Type** to Delivery.
 5. Ensure you specify the appropriate launch parameters for the email application.
 6. Click **Save**.
 7. Edit the Configurable Application Values (CAV) for the AvayaPOMEmail POM shipped application, and delete the web service IP address.
 8. Click **Apply** and click **Save**.

POM ports and licenses

Using POM, you can run multiple simultaneous campaign jobs. The port licenses available to POM are distributed among all running jobs. The distribution mechanism uses the Minimum Ports, Maximum Ports, and Priority parameters, which are set for each job task in the campaign strategy. The priority is a number with the minimum value 1 (lowest priority) and the maximum value 10 (highest priority). The higher the number, the higher the priority.

You can specify either a dynamic license or a reserved license.

The allocation of ports to each job task is in proportion to the priority assigned to the job task. But POM license manager never allocates more than the Maximum Ports assigned to a job task. Also, the license manager tries to allocate at least the Minimum Ports to a job task.

Before starting an outbound call attempt, the Campaign Manager queries the license manager and if available, gets the total number of licenses available for a job task and marks the license as In use.

Reserved licenses

The licenses which are not reallocated to other jobs or task unless recalculation occurs are called reserved licenses.

In case of reserved licenses, the campaign job or task does not release the licenses even though the campaign job or task might not need the licenses.

The licenses allocated to the reserved job or task are retained till the recalculation happens. Jobs or tasks with reserved licenses cannot trigger the recalculation.

The license recalculation can occur when:

- A new job starts.
- A job is stopped.
- A job is paused.
- A job is resumed.
- You change the priority, minimum port, or maximum ports value through Supervisor Dashboard.
- A dynamic job is not using the allocated quota, and there are other jobs in the system that need more licenses.

In case of dynamic jobs with outbound or notification licenses, if the job does not make call attempt for a duration of one minute, then it is considered that the dynamic job does not need more licenses.

Whenever license recalculation is triggered, the license quota for all jobs is recalculated irrespective of their allocation type.

Dynamic licenses

License allocation and management is performed better with the help of dynamic licensing. Dynamic licensing is useful for a job or a task that does not require all allocated licenses all the time. There are other jobs or tasks that require more licenses than the allocated licenses, simultaneously. With the help of dynamic licensing, POM can release some licenses and assign the licenses to the other jobs or tasks.

You can choose to use reserved or dynamic licensing. If you choose dynamic licensing, you must remember that:

- Only dynamic jobs or tasks can donate the additional or excess licenses.
- Any job or task can borrow the additional or excess licenses.
- No job or task can use more licenses than the maximum value specified in the campaign strategy.
- Dynamic jobs or tasks always reserve minimum licenses specified in the campaign strategy although the job or task might not need the licenses.
- Dynamic jobs or tasks start donating licenses only when the current job or task is not requesting licenses and the other job need more licenses.
- After donating licenses, dynamic jobs or tasks get the license back only when the dynamic job or task needs the licenses.
- POM allocates the licenses that are released by a dynamic job to other jobs according to their priorities, and the minimum and maximum values.

The following table shows the license calculation for different scenarios:

		Priority	Min	Max	Allocated licenses
Total licenses available = 120					

Table continues...

		Priority	Min	Max	Allocated licenses
1	No constraints				
	Job1	2	10	100	20
	Job2	2	10	100	20
	job3*	8	10	100	80
2	Max reached for one - excess redistributed				
	job1	2	10	100	30
	job2	2	10	100	30
	job3*	8	10	60	60
3	Shortfall for two - recovered from one with excess				
	job1	2	25	100	25
	job2	2	25	100	25
	job3*	8	10	100	70
4	Max for all - license wastage				
	job1	2	5	10	10
	job2	2	5	10	10
	job3*	8	5	90	90
5	Excess not enough to recover shortfall - three remain below min				
	job1	1	50	100	10
	job2	2	50	100	20
	job3	4	50	100	40
	job4*	8	50	100	50

* denotes dynamic jobs.

POM marks a license as “In use” just before making a call attempt. The POMDriver application releases the “In use” licenses once the call is over, call failed, call is disconnected, or a call is transferred to an agent.

If an error occurs in the POMDriver application or POM application, and the call is terminated, the Campaign Director periodically checks for such failures and forcefully releases the call and license. The scenarios where the Campaign Director releases the call and the license are as follows:

1. Error in the POMDriver application, where the call is in progress, but the MPP fails before outcome of the call is available. Campaign Director looks for calls where the in progress duration exceeds the configured time in minutes (Maximum call in-progress time parameter in global configuration). If the Campaign Director finds such calls, the Campaign Director forcefully releases the license engaged for such calls and marks the status of this call as Attempt Timeout so that the contact can be dialed again.
2. Error in the POMDriver application where an answering machine or live voice answers the call. The driver application launches the dialog application, but the application does not exit properly, as the application server where the POMDriver application is running, crashes.

Campaign Director looks for calls where the calls in answered state exceed the configured time in minutes, that is, the maximum call time parameter in global configuration. If the Campaign Director finds such calls, the Campaign Director forcefully releases the license engaged for such calls and updates the call completion time.

Dynamic licensing behavior for agent based campaigns

POM allocates licenses to the job only when the agents are logged in and are attached to a job, and releases the licenses from the job whenever the agents are detached from the job. When the job snoozes, POM releases all the agents immediately along with the licenses. The license goes back to the license pool. Also, during manual movement of agents, POM moves the licenses along with the agents.

Proactive Outreach Manager dialing order

The records in a contact list can be of the following types: callback, priority, regular, and retry.

POM dials these different records as per the dialing order you configure for the campaign on the Campaign Creation page.

You can also modify the dialing order when the campaign is running by using Supervisor Dashboard.

You can configure the dialing order only for the priority, regular, and retry records.

For a callback record, if the callback time matures, the callback record always takes precedence over the other record types for dialing.

If you do not specify a dialing order for a campaign, POM uses the following default dialing order for the campaign:

- Callback
- Priority
- Retry
- Regular

If the default dialing order is configured for a campaign, then:

- From the priority and retry records to be dialed for a single agent, POM dials the priority record first and then dials the retry record.
- From the priority and regular records to be dialed for a single agent, POM dials the priority record first and then dials the regular record.
- From the retry and regular records to be dialed for a single agent, POM dials the retry record first and then dials the regular record.

POM fetches one record in advance for dialing. POM fetches the priority record first. If there is no priority record remaining, POM fetches the retry record if the time for retry is matured for that record. If there are no priority and retry records remaining, POM fetches a regular record.

For information about the various dialing order scenarios, see:

- [Dialing order scenarios when parallel dialing is disabled](#) on page 138

- [Dialing order scenarios when parallel dialing is enabled](#) on page 155
- [Dialing order scenarios for attribute-based campaigns with parallel dialing disabled](#) on page 156
- [Scenarios when dialing order is modified at run time and parallel dialing is disabled](#) on page 167

Dialing order scenarios when parallel dialing is disabled

If the Parallel Dialing feature is disabled, POM fetches one record in advance for dialing from the contact list when handing over a dialed call to the agent.

For example, when handing over a dialed call for contact ID 1 to the agent, POM fetches contact ID 2 in advance for dialing.

Example 1

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Number of contact lists associated with campaign A: 1 (Contact list 1)
- Dialing order configured on the Campaign Creation page when creating campaign A: Priority→Retry→Regular
- Dialing allocation percentage for the contact list: 100%
- Parallel Dialing feature: Disabled
- Agent state: Ready
- A new high priority record is added by a web service to the contact list during the running campaign.

Dialing order flow:

1. Campaign A starts.
2. POM dials contact ID 1 and gives the call to the agent. The agent sets a retry on contact ID 1 with a retry interval of 2 minutes.
3. When dialing for contact ID 2 is in progress, a web service adds a new high priority contact ID 11 to the contact list.

In the meanwhile, the retry on contact ID 1 matures.

4. After the call for contact ID 2 is completed, POM dials the remaining records in the following order:
 - a. Contact ID 3 which is already picked up for dialing.
 - b. Contact ID 11 which is a priority record.
 - c. Contact ID 1 for which the retry has matured.
 - d. The remaining regular records, which are contact IDs 4, 5, 6, 7, 8, 9, 10.

Example 2

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Number of contact lists associated with campaign A: 1 (Contact list 1)
- Dialing order configured on the Campaign Creation page when creating campaign A: Priority→Regular→Retry
- Dialing allocation percentage for the contact list: 100%
- Parallel Dialing feature: Disabled
- Agent state: Ready
- A new high priority record is added by a web service to the contact list during the running campaign.

Dialing order flow:

1. Campaign A starts.
2. POM dials contact ID 1 and gives the call to the agent. The agent sets a retry on contact ID 1 with a retry interval of 2 minutes.
3. When dialing for contact ID 2 is in progress, a web service adds a new high priority contact ID 11 to the contact list.
In the meanwhile, the retry on contact ID 1 matures.
4. After the call for contact ID 2 is completed, POM dials the remaining records in the following order:
 - a. Contact ID 3 which is already picked up for dialing.
 - b. Contact ID 11 which is a priority record.
 - c. The remaining regular records, which are contact IDs 4, 5, 6, 7, 8, 9, 10.
 - d. Contact ID 1 for which the retry has matured.

Example 3

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Number of contact lists associated with campaign A: 1 (Contact list 1)
- Dialing order configured on the Campaign Creation page when creating campaign A: Retry→Priority→Regular
- Dialing allocation percentage for the contact list: 100%
- Parallel Dialing feature: Disabled
- Agent state: Ready
- A new high priority record is added by a web service to the contact list during the running campaign.

Dialing order flow:

1. Campaign A starts.
2. POM dials contact ID 1 and gives the call to the agent. The agent sets a retry on contact ID 1 with a retry interval of 2 minutes.
3. When dialing for contact ID 2 is in progress, a web service adds a new high priority contact ID 11 to the contact list.
In the meanwhile, the retry on contact ID 1 matures.
4. After the call for contact ID 2 is completed, POM dials the remaining records in the following order:
 - a. Contact ID 3 which is already picked up for dialing.
 - b. Contact ID 1 for which the retry has matured.
 - c. Contact ID 11 which is a priority record.
 - d. The remaining regular records, which are contact IDs 4, 5, 6, 7, 8, 9, 10.

Example 4

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2)
- Dialing order configured on the Campaign Creation page when creating campaign A: Priority→Retry→Regular
- Dialing allocation percentage for each contact list: 50%
Hence, in each dialing cycle, 5 records from contact list 1 are dialed first, and then 5 records from contact list 2 are dialed.
- Parallel Dialing feature: Disabled
- Agent state: Ready

Dialing order flow:

1. Campaign A starts and POM picks up the records from the contact lists as per the dialing allocation.
2. In the first dialing cycle:
As per the dialing allocation, contact ID 1 through contact ID 5 from contact list 1 are to be dialed first.
 - a. POM dials contact ID 1 and gives the call to the agent. The agent sets a retry on contact ID 1 with a retry interval of 5 minutes.
 - b. POM dials contact ID 2 that it had already fetched for dialing and gives the call to the agent.
 - c. Similarly, POM fetches and dials contact IDs 3, 4, and 5 and gives the calls to the agent. All calls are completed.

As per the dialing allocation, contact ID 11 through contact ID 15 from contact list 2 are to be dialed next.

Hence, POM fetches contact ID 11 for dialing when handing over the call for contact ID 5 to the agent.

- d. When dialing for contact ID 11 is in progress, the retry on contact ID 1 matures.

But, because dialing from contact list 2 is in progress, POM does not pick up the retry record from contact list 1 for dialing, which is contact ID 1.

- e. POM dials the remaining records from contact list 2, that is, contact ID 12, 13, 14, 15 and the calls are completed.

Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the second dialing cycle starts.

3. In the second dialing cycle:

- a. Because there is no priority record in contact list 1, POM dials contact ID 1 which is matured for retry from contact list 1.

- b. POM dials the remaining regular records from contact list 1, which are contact IDs 6, 7, 8, 9.

This sums up to 5 records from contact list 1 for this dialing cycle, which are contact IDs 1, 6, 7, 8, 9.

- c. POM dials the remaining regular records from contact list 2 as per 50% dialing allocation, that is, contact IDs 16, 17, 18, 19, 20.

Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the third dialing cycle starts.

4. In the third dialing cycle:

- a. POM dials the remaining regular record, which is contact ID 10 from contact list 1.

Example 5

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
- Number of contact lists associated with campaign A: 2 (Contacts list 1 and 2)
- Dialing order configured on the Campaign Creation page when creating campaign A: Priority→Regular→Retry
- Dialing allocation percentage for each contact list: 50%

Hence, in each dialing cycle, 5 records from contact list 1 are dialed first, and then 5 records from contact list 2 are dialed.

- Parallel Dialing feature: Disabled
- Agent state: Ready

Dialing order flow:

1. Campaign A starts and POM picks up the records from the contact lists as per the dialing allocation.
2. In the first dialing cycle:

As per the dialing allocation, contact ID 1 through contact ID 5 from contact list 1 are to be dialed first.

- a. POM dials contact ID 1 and gives the call to the agent. The agent sets a retry on contact ID 1 with a retry interval of 5 minutes.
- b. POM dials contact ID 2 that it had already fetched for dialing and gives the call to the agent.
- c. Similarly, POM fetches and dials contact IDs 3, 4, and 5 and gives the calls to the agent. All calls are completed.

As per the dialing allocation, contact ID 11 through contact ID 15 from contact list 2 are to be dialed next.

Hence, POM fetches contact ID 11 for dialing when handing over the call for contact ID 5 to the agent.

- d. When dialing for contact ID 11 is in progress, the retry on contact ID 1 matures.
But, because dialing from contact list 2 is in progress, POM does not pick up the retry record from contact list 1 for dialing, which is contact ID 1.
- e. POM dials the remaining records from contact list 2, which are contact ID 12, 13, 14, 15. The calls are completed.

Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the second dialing cycle starts.

3. In the second dialing cycle:
 - a. Because there is no priority record in contact list 1, POM dials the remaining regular records from contact list 1, which are contact IDs 6, 7, 8, 9, 10.
 - b. POM dials the remaining regular records from contact list 2 as per 50% dialing allocation, which are contact IDs 16, 17, 18, 19, 20.

Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the third dialing cycle starts.

4. In the third dialing cycle:
 - a. POM dials contact ID 1 which is matured for retry from contact list 1.

Example 6

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2)

- Dialing order configured on the Campaign Creation page when creating campaign A:
Priority→Retry→Regular

- Dialing allocation percentage for each contact list: 50%

Hence, in each dialing cycle, 5 records from contact list 1 are dialed first, and then 5 records from contact list 2 are dialed.

- Parallel Dialing feature: Disabled
- Agent state: Ready
- The priority of a record in the contact list is updated to high priority by a web service during the running campaign.

Dialing order flow:

1. Campaign A starts and POM picks up the records from the contact lists as per the dialing allocation.
2. In the first dialing cycle:

As per the dialing allocation, contact ID 1 through contact ID 5 from contact list 1 are to be dialed first.

- a. POM dials contact ID 1 and gives the call to the agent. The agent sets a retry on contact ID 1 with a retry interval of 5 minutes.
- b. POM dials contact ID 2 that it had already fetched for dialing and gives the call to the agent.
- c. Similarly, POM fetches and dials contact IDs 3, 4, and 5 and gives the calls to the agent. All calls are completed.

As per the dialing allocation, contact ID 11 through contact ID 15 from contact list 2 are to be dialed next.

Hence, POM fetches contact ID 11 for dialing when handing over the call for contact ID 5 to the agent.

- d. When dialing for contact ID 11 is in progress, the retry on contact ID 1 matures.

Also, the priority of contact ID 10 is updated to high priority by a web service.

- e. The call for contact ID 11 is completed.
- f. Because POM has already picked up contact ID 12 from contact list 2 for dialing, contact ID 12 is dialed.
- g. Because the priority of contact ID 10 is updated to high priority by a web service, irrespective of the dialing allocation, POM dials contact ID 10 from contact list 1.
POM does not consider this call for the dialing cycle count because the priority of this record is updated by a web service.
- h. POM dials the remaining regular records from contact list 2, which are contact IDs 13, 14, 15.

Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the second dialing cycle starts.

3. In the second dialing cycle:

- a. Because there are no priority records in contact list 1, POM dials contact ID 1 which is matured for retry from contact list 1.
- b. POM dials the remaining regular records from contact list 1, which are contact IDs 6, 7, 8, 9.
- c. POM dials the remaining regular records from contact list 2, which are contact IDs 16, 17, 18, 19, 20.

Example 7

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
- Number of contact lists associated with campaign A: 2 (Contact list 1 and 2)
- Dialing order configured on the Campaign Creation page when creating campaign A: Priority→Regular→Retry
- Dialing allocation percentage for each contact list: 50%
Hence, in each dialing cycle, 5 records from contact list 1 are dialed first, and then 5 records from contact list 2 are dialed.
- Parallel Dialing feature: Disabled
- Agent state: Ready
- The priority of a record in the contact list is updated to high priority by a web service during the running campaign.

Dialing order flow:

1. Campaign A starts and POM picks up the records from the contact lists as per the dialing allocation.
2. In the first dialing cycle:

As per the dialing allocation, contact ID 1 through contact ID 5 from contact list 1 are to be dialed first.

- a. POM dials contact ID 1 and gives the call to the agent. The agent sets a retry on contact ID 1 with a retry interval of 5 minutes.
- b. POM dials contact ID 2 that it had already fetched for dialing and gives the call to the agent.
- c. Similarly, POM fetches and dials contact IDs 3, 4, and 5 and gives the calls to the agent. All calls are completed.

As per the dialing allocation, contact ID 11 through contact ID 15 from contact list 2 are to be dialed next.

Hence, POM fetches contact ID 11 for dialing when handing over the call for contact ID 5 to the agent.

- d. When dialing for contact ID 11 is in progress, the retry on contact ID 1 matures.

Also, the priority of contact ID 10 is updated to high priority by a web service.

- e. The call for contact ID 11 is completed.
- f. Because POM has already picked up contact ID 12 from contact list 2 for dialing, contact ID 12 is dialed.
- g. Because the priority of contact ID 10 is updated to high priority by a web service, irrespective of the dialing allocation, POM dials contact ID 10 from contact list 1.

POM does not consider this call for the dialing cycle count because the priority of this contact is updated by a web service.

- h. POM dials the remaining regular records from contact list 2, which are contact IDs 13, 14, 15.

Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the second dialing cycle starts.

3. In the second dialing cycle:

- a. Because there is no priority record in contact list 1, POM dials the remaining regular records from contact list 1, which are contact IDs 6, 7, 8, 9.
- b. POM dials contact ID 1 which is matured for retry from contact list 1.
- c. POM dials the remaining regular records from contact list 2, which are contact IDs 16, 17, 18, 19, 20.

Example 8

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2)
- Dialing order configured on the Campaign Creation page when creating campaign A: Retry→Priority→Regular
- Dialing allocation percentage for each contact list: 50%

Hence, in each dialing cycle, 5 records from contact list 1 are dialed first, and then 5 records from contact list 2 are dialed.

- Parallel Dialing feature: Disabled
- Agent state: Ready
- The priority of a record in the contact list is updated to high priority by a web service during the running campaign.

Dialing order flow:

1. Campaign A starts and POM picks up the records from the contact lists as per the dialing allocation.
2. In the first dialing cycle:

As per the dialing allocation, contact ID 1 through contact ID 5 from contact list 1 are to be dialed first.

- a. POM dials contact ID 1 and gives the call to the agent. The agent sets a retry on contact ID 1 with a retry interval of 5 minutes.
- b. POM dials contact ID 2 that it had already fetched for dialing and gives the call to the agent.
- c. Similarly, POM fetches and dials contact IDs 3, 4, and 5 and gives the calls to the agent. All calls are completed.

As per the dialing allocation, contact ID 11 through contact ID 15 from contact list 2 are to be dialed next.

Hence, POM fetches contact ID 11 for dialing when handing over the call for contact ID 5 to the agent.

- d. When dialing for contact ID 11 is in progress, the retry on contact ID 1 matures.
Also, the priority of contact ID 10 is updated to high priority by a web service.
- e. The call for contact ID 11 is completed.
- f. Because POM has already picked up contact ID 12 from contact list 2 for dialing, contact ID 12 is dialed.
- g. Because contact list 1 has a matured retry record, POM dials the retry record, which is contact ID 1.
- h. Because the priority of contact ID 10 is updated to high priority by a web service, irrespective of the dialing allocation, POM dials contact ID 10 from contact list 1.

POM does not consider this call for the dialing cycle count because the priority of this contact is updated by a web service.

- i. POM dials the regular records from contact list 2, which are contact IDs 13 and 14.

POM dials only 4 records from contact list 2 in this dialing cycle because the total records dialed from both the contact lists in this dialing cycle is 10, which is the threshold for each dialing cycle.

3. In the second dialing cycle:

- a. POM dials the remaining regular records from contact list 1, which are contact IDs 6, 7, 8, 9.
- b. POM dials the remaining regular records from contact list 2, which are contact IDs 15, 16, 17, 18, 19, 20.

Example 9

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2)
- Dialing order configured on the Campaign Creation page when creating campaign A: Priority→Retry→Regular

- Dialing allocation percentage for each contact list: 50%

Hence, in each dialing cycle, 5 records from contact list 1 are dialed first, and then 5 records from contact list 2 are dialed.

- Parallel Dialing feature: Disabled
- Agent state: Ready
- **Pause Dialing During Record Selection** check box on the Campaign Creation page when creating campaign A: Disabled
- High priority records are added to the contact list by a data import job or an upload contact job during the running campaign.

Dialing order flow:

1. Campaign A starts and POM picks up the records from the contact lists as per the dialing allocation.
2. In the first dialing cycle:

As per the dialing allocation, contact ID 1 through contact ID 5 from contact list 1 are to be dialed first.

- a. POM dials contact ID 1 and gives the call to the agent. The agent sets a retry on contact ID 1 with a retry interval of 5 minutes.
- b. POM dials contact ID 2 that it had already fetched for dialing and gives the call to the agent.
- c. Similarly, POM fetches and dials contact IDs 3, 4, and 5 and gives the calls to the agent. All calls are completed.

As per the dialing allocation, contact ID 11 through contact ID 15 from contact list 2 are to be dialed next.

Hence, POM fetches contact ID 11 for dialing when handing over the call for contact ID 5 to the agent.

- d. When dialing for contact ID 11 is in progress, the retry on contact ID 1 matures.

Also, records with contact IDs 7, 8, 9, 10, 21 are added with high priority by a data import job or upload contact job to contact list 1.

Which means, 4 existing records are updated and 1 new record is added to contact list 1 for dialing.

- e. The call for contact ID 11 is completed.
- f. Because the **Pause Dialing During Record Selection** feature is disabled, POM dials the regular records from contact list 2, which are contact IDs 12, 13, 14, 15.

Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the second dialing cycle starts.

3. In the second dialing cycle:

- a. POM dials the high priority records from contact list 1, which are contact IDs 7, 8, 9, 10, 21.
- b. POM dials the remaining regular records from contact list 2, which are contact IDs 16, 17, 18, 19, 20.

Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the third dialing cycle starts.

4. In the third dialing cycle:

- a. POM dials contact ID 1 which is matured for retry from contact list 1.
- b. POM dials the remaining regular record from contact list 1, which is contact ID 6 .

Example 10

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2)
- Dialing order configured on the Campaign Creation page when creating campaign A: Priority→Retry→Regular
- Dialing allocation percentage for each contact list: 50%
Hence, in each dialing cycle, 5 records from contact list 1 are dialed first, and then 5 records from contact list 2 are dialed.
- Parallel Dialing feature: Disabled
- Agent state: Ready
- **Pause Dialing During Record Selection** check box on the Campaign Creation page when creating campaign A: Enabled
- High priority records are added to the contact list by a data import job or an upload contact job during the running campaign.

Dialing order flow:

1. Campaign A starts and POM picks up the records from the contact lists as per the dialing allocation.
2. In the first dialing cycle:

As per the dialing allocation, contact ID 1 through contact ID 5 from contact list 1 are to be dialed first.

- a. POM dials contact ID 1 and gives the call to the agent. The agent sets a retry on contact ID 1 with a retry interval of 5 minutes.
- b. POM dials contact ID 2 that it had already fetched for dialing and gives the call to the agent.
- c. Similarly, POM fetches and dials contact IDs 3, 4, and 5 and gives the calls to the agent. All calls are completed.

As per the dialing allocation, contact ID 11 through contact ID 15 from contact list 2 are to be dialed next.

Hence, POM fetches contact ID 11 for dialing when handing over the call for contact ID 5 to the agent.

- d. When dialing for contact ID 11 is in progress, the retry on contact ID 1 matures.

Also, records with contact IDs 7, 8, 9, 10, 21 are added with high priority by a data import job or upload contact job to contact list 1.

Which means, 4 existing records are updated and 1 new record is added to contact list 1 for dialing.

- e. The call for contact ID 11 is completed.
- f. POM dials contact ID 12 that was already picked up for dialing.
- g. Because the **Pause Dialing During Record Selection** feature is enabled, irrespective of the dialing allocation, POM dials the high priority records from contact list 1, which are contact IDs 7, 8, 9, 10, 21.

POM does not consider these calls for the dialing cycle count because these records are added by a web service.

- h. POM dials the regular records from contact list 2, which are contact IDs 13, 14, 15.

Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the second dialing cycle starts.

3. In the second dialing cycle:

- a. POM dials contact ID 1 which is matured for retry from contact list 1.
- b. POM dials the remaining regular record from contact list 1, which is contact ID 6.
- c. POM dials the remaining regular records from contact list 2, which are contact IDs 16, 17, 18, 19, 20.

Example 11

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2)
- Dialing order configured on the Campaign Creation page when creating campaign A: Priority→Regular→Retry
- Dialing allocation percentage for each contact list: 50%
Hence, in each dialing cycle, 5 records from contact list 1 are dialed first, and then 5 records from contact list 2 are dialed.
- Parallel Dialing feature: Disabled
- Agent state: Ready
- **Pause Dialing During Record Selection** check box on the Campaign Creation page when creating campaign A: Disabled
- High priority records are added to the contact list by a data import job or an upload contact job during the running campaign.

Dialing order flow:

1. Campaign A starts and POM picks up the records from the contact lists as per the dialing allocation.
2. In the first dialing cycle:

As per the dialing allocation, contact ID 1 through contact ID 5 from contact list 1 are to be dialed first.

- a. POM dials contact ID 1 and gives the call to the agent. The agent sets a retry on contact ID 1 with a retry interval of 5 minutes.
- b. POM dials contact ID 2 that it had already fetched for dialing and gives the call to the agent.
- c. Similarly, POM fetches and dials contact IDs 3, 4, and 5 and gives the calls to the agent. All calls are completed.

As per the dialing allocation, contact ID 11 through contact ID 15 from contact list 2 are to be dialed next.

Hence, POM fetches contact ID 11 for dialing when handing over the call for contact ID 5 to the agent.

- d. When dialing for contact ID 11 is in progress, the retry on contact ID 1 matures.

Also, records with contact IDs 7, 8, 9, 10, 21 are added with high priority by a data import job or upload contact job to contact list 1.

Which means, 4 existing records are updated and 1 new record is added to contact list 1 for dialing.

- e. The call for contact ID 11 is completed.
- f. Because the **Pause Dialing During Record Selection** feature is disabled, POM dials the regular records from contact list 2, that is, contact IDs 12, 13, 14, 15.

Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the second dialing cycle starts.

3. In the second dialing cycle:

- a. POM dials the high priority records from contact list 1, which are contact IDs 7, 8, 9, 10, 21.
- b. POM dials the remaining regular records from contact list 2, which are contact IDs 16, 17, 18, 19, 20.

Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the third dialing cycle starts.

4. In the third dialing cycle:

- a. POM dials the remaining regular record from contact list 1, which is contact ID 6.
- b. POM dials contact ID 1 which is matured for retry from contact list 1.

Example 12

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2)
- Dialing order configured on the Campaign Creation page when creating campaign A: Priority→Regular→Retry
- Dialing allocation percentage for each contact list: 50%
Hence, in each dialing cycle, 5 records from contact list 1 are dialed first, and then 5 records from contact list 2 are dialed.
- Parallel Dialing feature: Disabled
- Agent state: Ready
- **Pause Dialing During Record Selection** check box on the Campaign Creation page when creating campaign A: Enabled
- High priority records are added to the contact list by a data import job or an upload contact job during the running campaign.

Dialing order flow:

1. Campaign A starts and POM picks up the records from the contact lists as per the dialing allocation.
As per the dialing allocation, contact ID 1 through contact ID 5 from contact list 1 are to be dialed first.
2. In the first dialing cycle:
 - a. POM dials contact ID 1 and gives the call to the agent. The agent sets a retry on contact ID 1 with a retry interval of 5 minutes.
 - b. POM dials contact ID 2 that it had already fetched for dialing and gives the call to the agent.
 - c. Similarly, POM fetches and dials contact IDs 3, 4, and 5 and gives the calls to the agent. All calls are completed.
As per the dialing allocation, contact ID 11 through contact ID 15 from contact list 2 are to be dialed next.
Hence, POM fetches contact ID 11 for dialing when handing over the call for contact ID 5 to the agent.
 - d. When dialing for contact ID 11 is in progress, the retry on contact ID 1 matures.
Also, records with contact IDs 7, 8, 9, 10, 21 are added with high priority by a data import job or upload contact job to contact list 1.
Which means, 4 existing records are updated and 1 new record is added to contact list 1 for dialing.
 - e. The call for contact ID 11 is completed.

- f. POM dials contact ID 12 that was already picked up for dialing.
- g. Because the **Pause Dialing During Record Selection** feature is enabled, irrespective of the dialing allocation, POM dials the high priority records from contact list 1, which are contact IDs 7, 8, 9, 10, 21.

POM does not consider these calls for the dialing cycle count because these records are added by a web service.

- h. POM dials the remaining regular records from contact list 2, which are contact IDs 13, 14, 15.

Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the second dialing cycle starts.

3. In the second dialing cycle:

- a. POM dials the remaining regular record from contact list 1, which is contact ID 6.
- b. POM dials contact ID 1 which is matured for retry from contact list 1.
- c. POM dials the remaining regular records from contact list 2, which are contact IDs 16, 17, 18, 19, 20.

Example 13

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2)
- Dialing order configured on the Campaign Creation page when creating campaign A: Retry→Priority→Regular
- Dialing allocation percentage for each contact list: 50%

Hence, in each dialing cycle, 5 records from contact list 1 are dialed first, and then 5 records from contact list 2 are dialed.

- Parallel Dialing feature: Disabled
- Agent state: Ready
- **Pause Dialing During Record Selection** check box on the Campaign Creation page when creating campaign A: Disabled
- High priority records are added to the contact list by a data import job or an upload contact job during the running campaign.

Dialing order flow:

1. Campaign A starts and POM picks up the records from the contact lists as per the dialing allocation.
2. In the first dialing cycle:

As per the dialing allocation, contact ID 1 through contact ID 5 from contact list 1 are to be dialed first.

- a. POM dials contact ID 1 and gives the call to the agent. The agent sets a retry on contact ID 1 with a retry interval of 5 minutes.
- b. POM dials contact ID 2 that it had already fetched for dialing and gives the call to the agent.
- c. Similarly, POM fetches and dials contact IDs 3, 4, and 5 and gives the calls to the agent. All calls are completed.

As per the dialing allocation, contact ID 11 through contact ID 15 from contact list 2 are to be dialed next.

Hence, POM fetches contact ID 11 for dialing when handing over the call for contact ID 5 to the agent.

- d. When dialing for contact ID 11 is in progress, the retry on contact ID 1 matures.
Also, records with contact IDs 7, 8, 9, 10, 21 are added with high priority by a data import job or upload contact job to contact list 1.
Which means, 4 existing records are updated and 1 new record is added to contact list 1 for dialing.
- e. The call for contact ID 11 is completed.
- f. Because the **Pause Dialing During Record Selection** feature is disabled, POM dials the regular records from contact list 2, that is, contact IDs 12, 13, 14, 15.
Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the second dialing cycle starts.

3. In the second dialing cycle:

- a. POM dials contact ID 1 which is matured for retry from contact list 1.
- b. POM dials the high priority records from contact list 1, which are contact IDs 7, 8, 9, 10.
This sums up to 5 records from contact list 1 for this dialing cycle, that is, contact IDs 1, 7, 8, 9, 10.
- c. POM dials the remaining regular records from contact list 2, which are contact IDs 16, 17, 18, 19, 20.
Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the second dialing cycle starts.

4. In the third dialing cycle:

- a. POM dials the remaining high priority record from contact list 1, which is contact ID 21.
- b. POM dials the remaining regular record from contact list 1, which is contact ID 6.

Example 14

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.

- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2)
- Dialing order configured on the Campaign Creation page when creating campaign A: Retry→Priority→Regular
- Dialing allocation percentage for each contact list: 50%
Hence, in each dialing cycle, 5 records from contact list 1 are dialed first, and then 5 records from contact list 2 are dialed.
- Parallel Dialing feature: Disabled
- Agent state: Ready
- **Pause Dialing During Record Selection** check box on the Campaign Creation page when creating campaign A: Enabled
- High priority records are added to the contact list by a data import job or an upload contact job during the running campaign.

Dialing order flow:

1. Campaign A starts and POM picks up the records from the contact lists as per the dialing allocation.
2. In the first dialing cycle:

As per the dialing allocation, contact ID 1 through contact ID 5 from contact list 1 are to be dialed first.

- a. POM dials contact ID 1 and gives the call to the agent. The agent sets a retry on contact ID 1 with a retry interval of 5 minutes.
- b. POM dials contact ID 2 that it had already fetched for dialing and gives the call to the agent.
- c. Similarly, POM fetches and dials contact IDs 3, 4, and 5 and gives the calls to the agent. All calls are completed.

As per the dialing allocation, contact ID 11 through contact ID 15 from contact list 2 are to be dialed next.

Hence, POM fetches contact ID 11 for dialing when handing over the call for contact ID 5 to the agent.

- d. When dialing for contact ID 11 is in progress, the retry on contact ID 1 matures.

Also, records with contact IDs 7, 8, 9, 10, 21 are added with high priority by a data import job or upload contact job to contact list 1.

Which means, 4 existing records are updated and 1 new record is added to contact list 1 for dialing.

- e. The call for contact ID 11 is completed.
- f. POM dials contact ID 12 that was already picked up for dialing.
- g. Because the **Pause Dialing During Record Selection** feature is enabled, irrespective of the dialing allocation, POM dials contact ID 1 which is matured for retry from contact list 1.

- h. POM dials the high priority records from contact list 1, which are contact IDs 7, 8, 9, 10, 21.

POM does not consider these calls for the dialing cycle count because these records are added by a web service.

- i. POM dials contact IDs 13 and 14 from contact list 2, which are regular records.

POM dials only 4 records from contact list 2 in this dialing cycle because the total records dialed from both the contact lists in this dialing cycle is 10, which is the threshold for each dialing cycle.

3. In the second dialing cycle:

- a. POM dials the remaining regular record from contact list 1, which is contact ID 6.
- b. POM dials the remaining regular records from contact list 2, which are contact IDs 15, 16, 17, 18, 19, 20.

Dialing order scenarios when parallel dialing is enabled

When the Parallel Dialing feature is enabled, POM picks up contacts and dials multiple contacts simultaneously. Parallel dialing does not always follow the sorting order specified for the campaign. POM dials the contacts and randomly hands over the calls to the agents. However, POM fetches the contacts from the database for processing according to configured dialing order.

The following is an example scenario. To view the actual order in which POM dials the contacts and hands over the calls to the agents, see the Call Start Time or Call Connect Time columns in the Campaign Detail Report.

Example 1

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Number of contact lists associated with campaign A: 1 (contact list 1)
- Dialing order configured on the Campaign Creation page when creating campaign A: Priority→Retry→Regular
- Dialing allocation percentage for the contact list: 100%
- Parallel Dialing feature: Enabled
- Agent state: Ready
- A new high priority record is added by a web service to the contact list during the running campaign.

Dialing order flow:

1. Campaign A starts and POM fetches contact IDs 1, 2, 3 for dialing.
2. POM dials contact ID 1 and gives the call to an agent and fetches contact ID 4 for dialing.
The agent sets a retry on contact ID 1 with a retry interval of 2 minutes.
3. POM dials contact ID 2 and gives the call to an agent. When the agent is on the call for contact ID 2, a high priority record with contact ID 11 is added to the contact list by a web service.

In the meanwhile, the retry on contact ID 1 matures.

4. When handing over the call for contact ID 2 to the agent, POM fetches contact ID 5 for dialing.
5. The call for contact ID 2 is completed.
6. The order of dialing is the following:
 - a. Because contact IDs 3, 4, and 5 are already picked up for dialing, POM dials these contacts.
 - b. POM dials the high priority record, which is contact ID 11.
 - c. POM dials the retry record that is matured for dialing, which is contact ID 1.
 - d. POM dials the remaining regular records, which are contact IDs 6, 7, 8, 9, 10.

Dialing order scenarios for attribute-based campaigns with parallel dialing disabled

This topic provides dialing order scenarios for attribute-based campaigns. An attribute-based campaign is a campaign for which the **Contact Assignment to Agent** option is set to **Attribute** or **Agent ID** or both on the Campaign Creation page. A record is assigned to an agent only if a matching attribute value is found in the contact.

For example:

If the city attribute for agent 1 is set to City = New York in a campaign, only contacts with City = New York are assigned to agent 1.

If the city attribute for agent 2 is set to City = Chicago in a campaign, only contacts with City = Chicago are assigned to agent 2.

The Parallel Dialing feature is disabled.

Example 1

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
Contact ID 1 through contact ID 5 match agent attributes for agent 1.
Contact ID 6 through contact ID 10 match agent attributes for agent 2.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
Contact ID 11 through contact ID 15 match agent attributes for agent 1.
Contact ID 16 through contact ID 20 match agent attributes for agent 2.
- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2)
- Dialing order configured on the Campaign Creation page when creating campaign A: Priority→Retry→Regular
- Dialing allocation percentage for each contact list: 50%
- Agent state for agents 1 and 2: Ready

- Parallel Dialing feature: Disabled

Dialing order flow:

1. Campaign A starts and POM fetches the records from the contact lists as per the dialing allocation.

As per the dialing allocation, 5 records from contact list 1 and 5 records from contact list 2 are to be dialed in each dialing cycle.

2. In the first dialing cycle:

- a. • Agent 1: From contact list 1, POM dials contact ID 1 and gives the call to agent 1.
• Agent 2: From contact list 1, POM dials contact ID 6 and gives the call to agent 2.
- b. • Agent 1 sets a retry on contact ID 1 with a retry interval of 5 minutes.
• Agent 2 also sets a retry on contact ID 6 with a retry interval of 5 minutes.
- c. • Agent 1: POM dials contact ID 2 and gives the call to agent 1.
• Agent 2: POM dials contact ID 7 and gives the call to agent 2.

The calls for contact IDs 2 and 7 are completed.

- d. • Agent 1: POM dials contact ID 3 and gives the call to agent 1.
• Agent 2: Because 5 records, which are contact IDs 1, 2, 3, 6, 7, from contact list 1 are already dialed in this dialing cycle, POM dials contact ID 16 from contact list 2, and gives the call to agent 2.

The call for contact ID 3 is completed.

- e. • Agent 1: POM dials contact ID 11 and gives the call to agent 1.
• Agent 2: Call for contact ID 16 is in progress.

The call for contact ID 11 is completed.

- f. • Agent 1: POM dials contact ID 12 and gives the call to agent 1.
• Agent 2: Agent 2 completes the call for contact ID 16. Hence, POM dials contact ID 17 and gives the call to agent 2.

The call for contact ID 12 is completed.

- g. • Agent 1: POM dials contact ID 13 and gives the call to agent 1.

The call for contact ID 13 is completed.

- Agent 2: Agent 2 completes the call for contact ID 17.

Because 5 records from each contact list are dialed in this dialing cycle, the second dialing cycle starts.

3. In the second dialing cycle:

When the second dialing cycle starts, retries on contact IDs 1 and 6 mature.

- a. • Agent 1: POM dials the retry record, which is contact ID 1, and gives the call to agent 1.
• Agent 2: POM dials the retry record, which is contact ID 6, and gives the call to agent 2.

The calls for contact IDs 1 and 6 are completed.

- b. • Agent 1: POM dials the regular record, which is contact ID 4, from contact list 1 and gives the call to agent 1.
- Agent 2: POM dials the regular record, which is contact ID 8, from contact list 1 and gives the call to agent 2.

The calls for contact IDs 4 and 8 are completed.

- c. • Agent 1: POM dials contact ID 5 and gives the call to agent 1.
- Agent 2: Because 5 records, which are contact IDs 1, 4, 5, 6, 8, from contact list 1 are already dialed in this dialing cycle, POM dials contact ID 18 from contact list 2 for agent 2.

The calls for contact IDs 5 and 18 are completed.

- d. • Agent 1: POM dials contact ID 14 and gives the call to agent 1.
- Agent 2: POM dials contact ID 19 and gives the call to agent 2.

The calls for contact IDs 14 and 19 are completed.

- e. • Agent 1: POM dials contact ID 15 and gives the call to agent 1.
- All records for agent 1 are completed. No records are remaining to be dialed.
- Agent 2: POM dials contact ID 20 and gives the call to agent 2.

The calls for contact IDs 15 and 20 are completed.

Because 5 records from each contact list are dialed in this dialing cycle, the third dialing cycle starts.

4. In the third dialing cycle:

- a. Agent 2: POM dials the regular record, which is contact ID 9, from contact list 1 and gives the call to agent 2.

The call for contact ID 9 is completed.

- b. Agent 2: POM dials the remaining regular record, which is contact ID 10, from contact list 1 and gives the call to agent 2.

The call for contact ID 10 is completed.

All records for agent 2 are completed. No records are remaining to be dialed.

Example 2

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
Contact ID 1 through contact ID 5 match agent attributes for agent 1.
Contact ID 6 through contact ID 10 match agent attributes for agent 2.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
Contact ID 11 through contact ID 15 match agent attributes for agent 1.
Contact ID 16 through contact ID 20 match agent attributes for agent 2.

- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2)
- Dialing order configured on the Campaign Creation page when creating campaign A: Priority→Regular→Retry
- Dialing allocation percentage for each contact list: 50%
- Agent state for agents 1 and 2: Ready
- Parallel Dialing feature: Disabled

Dialing order flow:

1. Campaign A starts and POM fetches the records from the contact lists as per the dialing allocation.

As per the dialing allocation, 5 records from contact list 1 and 5 records from contact list 2 are to be dialed in each dialing cycle.

2. In the first dialing cycle:

- a. • Agent 1: From contact list 1, POM dials contact ID 1 and gives the call to agent 1.
• Agent 2: From contact list 1, POM dials contact ID 6 and gives the call to agent 2.
- b. • Agent 1 sets a retry on contact ID 1 with a retry interval of 5 minutes.
• Agent 2 also sets a retry on contact ID 6 with a retry interval of 5 minutes.
- c. • Agent 1: POM dials contact ID 2 and gives the call to agent 1.
• Agent 2: POM dials contact ID 7 and gives the call to agent 2.

The calls for contact IDs 2 and 7 are completed.

- d. • Agent 1: POM dials contact ID 3 and gives the call to agent 1.
• Agent 2: Because 5 records, which are contact IDs 1, 2, 3, 6, 7, from contact list 1 are already dialed in this dialing cycle, POM dials contact ID 16 from contact list 2 for agent 2.

The call for contact ID 3 is completed.

- e. • Agent 1: POM dials contact ID 11 and gives the call to agent 1.
• Agent 2: Call for contact ID 16 is in progress.

The call for contact ID 11 is completed.

- f. • Agent 1: POM dials contact ID 12 and gives the call to agent 1.
• Agent 2: Agent 2 completes the call for contact ID 16. Hence, POM dials contact ID 17 and gives the call to agent 2.

The call for contact ID 12 is completed.

- g. • Agent 1: POM dials contact ID 13 and gives the call to agent 1.

The call for contact ID 13 is completed.

- Agent 2: Agent 2 completes the call for contact ID 17.

Because 5 records from each contact list are dialed in this dialing cycle, the second dialing cycle starts.

3. In the second dialing cycle:

When the second dialing cycle starts, retries on contact IDs 1 and 6 mature.

- a. • Agent 1: POM dials the regular record, which is contact ID 4, from contact list 1 and gives the call to agent 1.
- Agent 2: POM dials the regular record, which is contact ID 8, from contact list 1 and gives the call to agent 2.

The calls for contact IDs 4 and 8 are completed.

- b. • Agent 1: POM dials contact ID 5 and gives the call to agent 1.
- Agent 2: POM dials contact ID 9 and gives the call to agent 2.

The calls for contact IDs 5 and 9 are completed.

- c. • Agent 1: Because there is no regular record remaining in contact list 1 for agent 1, and only 4 records from contact list 1 are dialed in this dialing cycle, POM dials the retry record, which is contact ID 1, from contact list 1 for agent 1.
- Agent 2: Because 5 records, which are contact IDs 1, 4, 5, 8, 9, from contact list 1 are already dialed in this dialing cycle, POM dials contact ID 18 from contact list 2 for agent 2.

The calls for contact IDs 1 and 18 are completed.

- d. • Agent 1: POM dials the regular record, which is contact ID 14, from contact list 2 and gives the call to agent 1.
- Agent 2: POM dials the regular record, which is contact ID 19, from contact list 2 and gives the call to agent 2.

The calls for contact IDs 14 and 19 are completed.

- e. • Agent 1: POM dials contact ID 15 and gives the call to agent 1.

All records for agent 1 are completed. No records are remaining to be dialed.

- Agent 2: POM dials contact ID 20 and gives the call to agent 2.

The calls for contact IDs 15 and 20 are completed.

Because 5 records from each contact list are dialed in this dialing cycle, the third dialing cycle starts.

4. In the third dialing cycle:

- a. Agent 2: POM dials the regular record, which is contact ID 10, from contact list 1 and gives the call to agent 2.

The call for contact ID 10 is completed.

- b. Agent 2: Because there is no remaining regular record for agent 2, POM dials the remaining retry record, which is contact ID 6, from contact list 1 for agent 2.

The call for contact ID 6 is completed.

All records for agent 2 are completed. No records are remaining to be dialed.

Example 3

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
Contact ID 1 through contact ID 5 match agent attributes for agent 1.
Contact ID 6 through contact ID 10 match agent attributes for agent 2.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
Contact ID 11 through contact ID 15 match agent attributes for agent 1.
Contact ID 16 through contact ID 20 match agent attributes for agent 2.
- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2)
- Dialing order configured on the Campaign Creation page when creating campaign A:
Retry→Priority→Regular
- Dialing allocation percentage for each contact list: 50%
- Agent state for agents 1 and 2: Ready
- Parallel Dialing feature: Disabled
- The priority of a record is modified to high priority by a web service during the running campaign.

Dialing order flow:

1. Campaign A starts and POM fetches the records from the contact lists as per the dialing allocation.

As per the dialing allocation, 5 records from contact list 1 and 5 records from contact list 2 are to be dialed in each dialing cycle.

2. In the first dialing cycle:

- a.
 - Agent 1: From contact list 1, POM dials contact ID 1 and gives the call to agent 1.
 - Agent 2: From contact list 1, POM dials contact ID 6 and gives the call to agent 2.
- b.
 - Agent 1 sets a retry on contact ID 1 with a retry interval of 5 minutes.
 - Agent 2 completes the call for contact ID 6.
- c.
 - Agent 1: POM dials contact ID 2.

While agent 1 is on the call for contact ID 2, the priority of contact ID 4 is modified to high priority by a web service.

In the meanwhile, the retry for contact ID 1 matures.

- Agent 2: POM dials contact ID 7 and gives the call to agent 2.

The call for contact ID 2 is completed.

- d.
 - Agent 1: POM dials the retry record, which is contact ID 1, and gives the call to agent 1.
 - Agent 2: The call for contact ID 7 is in progress.

The call for contact ID 1 is completed.

- e. • Agent 1: POM dials the high priority record, which is contact ID 4, and gives the call to agent 1.

POM does not consider this call for the dialing cycle count because the priority of this record is updated by a web service.

- Agent 2: Agent 2 completes the call for contact ID 7.

Because 5 records, which are contact IDs 1, 2, 6, 7, 1 (Retry), from contact list 1 are already dialed in this dialing cycle, POM dials contact ID 16 from contact list 2 for agent 2.

The call for contact ID 4 is completed.

- f. • Agent 1: POM dials the regular record, which is contact ID 11, from contact list 2 and gives the call to agent 1.
- Agent 2: The call for contact ID 16 is in progress.

The call for contact ID 11 is completed.

- g. • Agent 1: POM dials contact ID 12 and gives the call to agent 1.
- Agent 2: Agent 2 completes the call for contact ID 16. Hence, POM dials contact ID 17 and gives the call to agent 2.

The call for contact ID 12 is completed.

- h. • Agent 1: POM dials contact ID 13 and gives the call to agent 1.

The call for contact ID 13 is completed.

- Agent 2: Agent 2 completes the call for contact ID 17.

Because 5 records from each contact list are dialed in this dialing cycle, the second dialing cycle starts.

3. In the second dialing cycle:

- a. • Agent 1: POM dials the regular record, which is contact ID 3, from contact list 1 and gives the call to agent 1.
- Agent 2: POM dials the regular record, which is contact ID 8, from contact list 1 and gives the call to agent 2.

The calls for contact IDs 3 and 8 are completed.

- b. • Agent 1: POM dials contact ID 5 and gives the call to agent 1.
- Agent 2: POM dials contact ID 9 and gives the call to agent 2.

The calls for contact IDs 5 and 9 are completed.

- c. • Agent 1: POM dials contact ID 14 and gives the call to agent 1.
- Agent 2: POM dials contact ID 10 and gives the call to agent 2.

The calls for contact IDs 14 and 10 are completed.

- d. • Agent 1: POM dials contact ID 15 and gives the call to agent 1.

All records for agent 1 are completed. No records are remaining to be dialed.

- Agent 2: POM dials contact ID 18 and gives the call to agent 2.

The calls for contact IDs 15 and 18 are completed.

- e. Agent 2: POM dials contact ID 19 and gives the call to agent 2.

The call for contact ID 19 is completed.

- f. Agent 2: POM dials contact ID 20 and gives the call to agent 2.

The call for contact ID 20 is completed.

All records for agent 2 are completed. No records are remaining to be dialed.

Example 4

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
Contact ID 1 through contact ID 5 match agent attributes for agent 1.
Contact ID 6 through contact ID 10 match agent attributes for agent 2.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
Contact ID 11 through contact ID 15 match agent attributes for agent 1.
Contact ID 16 through contact ID 20 match agent attributes for agent 2.
- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2)
- Dialing order configured on the Campaign Creation page when creating campaign A:
Priority→Retry→Regular
- Dialing allocation percentage for each contact list: 50%
- Agent state for agents 1 and 2: Ready
- Parallel Dialing feature: Disabled
- The priority of a record is modified to high priority by a web service during the running campaign.

Dialing order flow:

1. Campaign A starts and POM fetches the records from the contact lists as per the dialing allocation.

As per the dialing allocation, 5 records from contact list 1 and 5 records from contact list 2 are to be dialed in each dialing cycle.

2. In the first dialing cycle:

- a.
 - Agent 1: From contact list 1, POM dials contact ID 1 and gives the call to agent 1.
 - Agent 2: From contact list 1, POM dials contact ID 6 and gives the call to agent 2.
- b.
 - Agent 1 sets a retry on contact ID 1 with a retry interval of 5 minutes.
 - Agent 2 completes the call for contact ID 6.
- c.
 - Agent 1: POM dials contact ID 2.

While agent 1 is on the call for contact ID 2, the priority of contact ID 4 is modified to high priority by a web service.

In the meanwhile, the retry for contact ID 1 matures.

- Agent 2: POM dials contact ID 7 and gives the call to agent 2.

The call for contact ID 2 is completed.

- d. • Agent 1: POM dials the high priority record, which is contact ID 4, and gives the call to agent 1.

POM does not consider this call for the dialing cycle count because the priority of this record is updated by a web service.

- Agent 2: Call for contact ID 7 is in progress.

The call for contact ID 4 is completed.

- e. • Agent 1: POM dials the retry record, which is contact ID 1, and gives the call to agent 1.
- Agent 2: Agent 2 completes the call for contact ID 7.

Because 5 records, which are contact IDs 1, 2, 6, 7, 1 (Retry) from contact list 1 are already dialed in this dialing cycle, POM dials contact ID 16 from contact list 2 for agent 2.

The call for contact ID 1 is completed.

- f. • Agent 1: POM dials the regular record, which is contact ID 11, from contact list 2 and gives the call to agent 1.
- Agent 2: The call for contact ID 16 is in progress.

The call for contact ID 11 is completed.

- g. • Agent 1: POM dials contact ID 12 and gives the call to agent 1.
- Agent 2: Agent 2 completes the call for contact ID 16. Hence, POM dials contact ID 17 and gives the call to agent 2.

The call for contact ID 12 is completed.

- h. • Agent 1: POM dials contact ID 13 and gives the call to agent 1.

The call for contact ID 13 is completed.

- Agent 2: Agent 2 completes the call for contact ID 17.

Because 5 records from each contact list are dialed in this dialing cycle, the second dialing cycle starts.

3. In the second dialing cycle:

- a. • Agent 1: POM dials the regular record, which is contact ID 3, from contact list 1 and gives the call to agent 1.
- Agent 2: POM dials the regular record, which is contact ID 8, from contact list 1 and gives the call to agent 2.

The calls for contact IDs 3 and 8 are completed.

- b. • Agent 1: POM dials contact ID 5 and gives the call to agent 1.
- Agent 2: POM dials contact ID 9 and gives the call to agent 2.

The calls for contact IDs 5 and 9 are completed.

- c. • Agent 1: Because all records for agent 1 from contact list 1 are completed, POM dials contact ID 14 from contact list 2 for agent 1.
- Agent 2: POM dials contact ID 10 and gives the call to agent 2.

The calls for contact IDs 14 and 10 are completed.

- d. • Agent 1: POM dials contact ID 15 and gives the call to agent 1.

All records for agent 1 are completed. No records are remaining to be dialed.

- Agent 2: POM dials contact ID 18 and gives the call to agent 2.

The calls for contact IDs 15 and 18 are completed.

- e. Agent 2: POM dials contact ID 19 and gives the call to agent 2.

The call for contact ID 19 is completed.

- f. Agent 2: POM dials contact ID 20 and gives the call to agent 2.

The call for contact ID 20 is completed.

All records for agent 2 are completed. No records are remaining to be dialed.

Example 5

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
Contact ID 1 through contact ID 5 match agent attributes for agent 1.
Contact ID 6 through contact ID 10 match agent attributes for agent 2.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
Contact ID 11 through contact ID 15 match agent attributes for agent 1.
Contact ID 16 through contact ID 20 match agent attributes for agent 2.
- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2).
- Dialing order configured on the Campaign Creation page when creating campaign A: Priority→Regular→Retry
- Dialing allocation percentage for each contact list: 50%
- Agent state for agents 1 and 2: Ready
- Parallel Dialing feature: Disabled
- The priority of a record is modified to high priority by a web service during the running campaign.

Dialing order flow:

1. Campaign A starts and POM fetches the records from the contact lists as per the dialing allocation.

As per the dialing allocation, 5 records from contact list 1 and 5 records from contact list 2 are to be dialed in each dialing cycle.

2. In the first dialing cycle:

- a. • Agent 1: From contact list 1, POM dials contact ID 1 and gives the call to agent 1.
• Agent 2: From contact list 1, POM dials contact ID 6 and gives the call to agent 2.
- b. • Agent 1 sets a retry on contact ID 1 with a retry interval of 5 minutes.
• Agent 2 completes the call for contact ID 6.
- c. • Agent 1: POM dials contact ID 2.

While agent 1 is on the call for contact ID 2, the priority of contact ID 4 is modified to high priority by a web service.

In the meanwhile, the retry for contact ID 1 matures.

- Agent 2: POM dials contact ID 7 and gives the call to agent 2.

The call for contact ID 2 is completed.

- d. • Agent 1: POM dials the high priority record, which is contact ID 4, and gives the call to agent 1.

POM does not consider this call for the dialing cycle count because the priority of this contact is updated by a web service.

- Agent 2: The call for contact ID 7 is in progress.

The call for contact ID 4 is completed.

- e. • Agent 1: POM dials the regular record, which is contact ID 3, from contact list 1 and gives the call to agent 1.
• Agent 2: Agent 2 completes the call for contact ID 7.

Because 5 records, which are contact IDs 1, 2, 3, 6, 7, from contact list 1 are already dialed in this dialing cycle, POM dials contact ID 16 from contact list 2 for agent 2.

The call for contact ID 3 is completed.

- f. • Agent 1: POM dials contact ID 11 and gives the call to agent 1.
• Agent 2: The call for contact ID 16 is in progress.

The call for contact ID 11 is completed.

- g. • Agent 1: POM dials contact ID 12 and gives the call to agent 1.
• Agent 2: Agent 2 completes the call for contact ID 16. Hence, POM dials contact ID 17 and gives the call to agent 2.

The call for contact ID 12 is completed.

- h. • Agent 1: POM dials contact ID 13, gives the call to agent 1.

The call for contact ID 13 is completed.

- Agent 2: Agent 2 completes the call for contact ID 17.

Because 5 records from each contact list are dialed in this dialing cycle, the second dialing cycle starts.

3. In the second dialing cycle:

- a. • Agent 1: POM dials the regular record, which is contact ID 5, from contact list 1 and gives the call to agent 1.
- Agent 2: POM dials the regular record, which is contact ID 8, from contact list 1 and gives the call to agent 2.

The calls for contact IDs 5 and 8 are completed.

- b. • Agent 1: Because there are no regular records remaining in contact list 1 for agent 1, POM dials the retry record, which is contact ID 1, and gives the call to agent 1.
- Agent 2: POM dials contact ID 9 and gives the call to agent 2.

The calls for contact IDs 1 and 9 are completed.

- c. • Agent 1: POM dials the regular record, which is contact ID 14, from contact list 2 and gives the call to agent 1.
- Agent 2: POM dials contact ID 10 and gives the call to agent 2.

The calls for contact IDs 14 and 10 are completed.

- d. • Agent 1: POM dials contact ID 15 and gives the call to agent 1.

All records for agent 1 are completed. No records are remaining to be dialed.

- Agent 2: POM dials contact ID 18 and gives the call to agent 2.

The calls for contact IDs 15 and 18 are completed.

- e. Agent 2: POM dials contact ID 19 and gives the call to agent 2.

The call for contact ID 19 is completed.

- f. Agent 2: POM dials the remaining regular record, which is contact ID 20, and gives the call to agent 2.

The call for contact ID 20 is completed.

All records for agent 2 are completed. No records are remaining to be dialed.

Scenarios when dialing order is modified at run time and parallel dialing is disabled

Example 1

Conditions:

- Contact list 1 contains 10 records, which are, contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Number of contact lists associated with campaign A: 1 (contact list 1)
- Dialing order configured on the Campaign Creation page when creating campaign A: Priority→Retry→Regular
- Dialing allocation percentage for the contact list: 100%
- Parallel Dialing feature: Disabled
- Agent state: Ready

- The dialing order is modified during the running campaign to: Retry→Priority→Regular
- High priority records are added by a web service to the contact list during the running campaign

Dialing order flow:

1. Campaign A starts.
2. POM dials contact ID 1 and gives the call to the agent. The agent sets a retry on contact ID 1 with a retry interval of 2 minutes.
3. When dialing for contact ID 2 is in progress, a new high priority contact ID 11 is added to the contact list by a web service.
In the meanwhile, retry on contact ID 1 matures.
4. Call for contact ID 2 is completed.
5. POM dials contact ID 3 which it had already picked up for dialing when handing over the call for contact ID 2.
6. POM dials the high priority record, which is contact ID 11.
7. POM dials the retry record, which is contact ID 1.
8. POM dials the regular record, which is contact ID 4.

When dialing for contact ID 4 is in progress, the dialing order is changed at run time to Retry→Priority→Regular.

The agent sets a retry on contact ID 4 with a retry interval of 2 minutes.

9. POM dials contact ID 5 which it had already picked up for dialing when handing over the call for contact ID 4.
When dialing for contact ID 5 is in progress, a new high priority contact ID 12 is added to the contact list by a web service.
In the meanwhile, retry on contact ID 4 matures.
10. After the call for contact ID 5 is completed, POM dials contact ID 6 which it had already picked up for dialing when handing over the call for contact ID 5.
11. POM dials the retry record, which is contact ID 4.
12. POM dials the high priority record, which is contact ID 12.
13. POM dials the remaining regular records, which are contact IDs 7, 8, 9, 10.

Example 2

Conditions:

- Contact list 1 contains 10 records, which are, contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Number of contact lists associated with campaign A: 1 (contact list 1)
- Dialing order configured on the Campaign Creation page when creating campaign A: Priority→Retry→Regular
- Dialing allocation percentage for the contact list: 100%
- Parallel Dialing feature: Disabled

- Agent state: Ready
- The dialing order is modified during the running campaign to: Priority→Regular→Retry
- High priority records are added by a web service to the contact list during the running campaign

Dialing order flow:

1. Campaign A starts.
2. POM dials contact ID 1 and gives the call to the agent. The agent sets a retry on contact ID 1 with a retry interval of 2 minutes.
3. When dialing for contact ID 2 is in progress, a new high priority contact ID 11 is added to the contact list by a web service.

In the meanwhile, retry on contact ID 1 matures.

4. Call for contact ID 2 is completed.
5. POM dials contact ID 3 which it had already picked up for dialing when handing over the call for contact ID 2.
6. POM dials the high priority record, which is contact ID 11.
7. POM dials the retry record, which is contact ID 1.
8. POM dials the regular record, which is contact ID 4.

When dialing for contact ID 4 is in progress, the dialing order is changed at run time to Priority→Regular→Retry.

The agent sets a retry on contact ID 4 with a retry interval of 2 minutes.

9. POM dials contact ID 5 which it had already picked up for dialing when handing over the call for contact ID 4.

When dialing for contact ID 5 is in progress, a new high priority contact ID 12 is added to the contact list by a web service.

In the meanwhile, retry on contact ID 4 matures.

10. After the call for contact ID 5 is completed, POM dials contact ID 6 which it had already picked up for dialing when handing over the call for contact ID 5.
11. POM dials the high priority record, which is contact ID 12.
12. POM dials the remaining regular records, which are contact IDs 7, 8, 9, 10.
13. POM dials the retry record, which is contact ID 4.

Updating the priority of records when the records are marked for retry

About this task

You can set the UPDATE_PRIORITY_IF_RETRY parameter to true to update the priority of all records that are marked for retry to that of a regular record, which is priority 5.

If any records are marked for retry after the `UPDATE_PRIORITY_IF_RETRY` parameter is set to true, then irrespective of the record priority, POM updates the priority of all such records to priority 5. This ensures that the retry records are dialed as per the configured retry interval.

By default, the `UPDATE_PRIORITY_IF_RETRY` parameter is set to true.

You can set the `UPDATE_PRIORITY_IF_RETRY` parameter to false if you do not want to change the priority of the records when the records are marked for retry.

For example, if the `UPDATE_PRIORITY_IF_RETRY` parameter is set to false and if a priority 7 record is marked for retry, the record priority is retained to 7.

Procedure

1. In the `pim_config` table located in the POM database, set the `UPDATE_PRIORITY_IF_RETRY` parameter to the desired value, that is, true or false.
2. To apply the changes, do the following:
 - a. Pause the running campaigns.
 - b. Restart the Campaign Manager service.
 - c. Resume the campaigns.

Campaign attributes

Overview

You can use campaign attributes to track and monitor the performance of a campaign. Each campaign attribute has a name and a data type. The data type can be Currency or Long. POM uses the campaign attributes through native agent scripts to monitor the performance of the campaigns.

For more information about native agent scripts, see [Overview](#) on page 511.

For example:

- If you are running a blood donation campaign and want to know the total number of responses to the campaign, you can create a campaign attribute called Responses with Long data type. You can increment each response to the campaign in the Responses attribute. You can then use the **Campaign Details** view of the Supervisor Dashboard to view the real-time value of the Responses attribute, which shows the total number of responses received for the blood donation campaign.
- If you are running a fundraising campaign and want to know the total funds collected during the campaign, you can create a FundsCollected campaign attribute with Currency data type. The agent can keep updating the fund value in the FundsCollected attribute. You can then use the **Campaign Details** view of the Supervisor Dashboard to view the real-time value of the FundsCollected attribute, which shows the total amount collected for the fundraising campaign.

You can create multiple campaign attributes for a campaign. You can also use the same campaign attribute in multiple campaigns.

You can update the campaign attribute values by using the web services or agent scripts.

Adding a campaign attribute

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Attributes**.
3. On the Campaign Attributes page, click **New Campaign Attribute**.
4. On the New Campaign Attribute page, add the relevant details.
5. Click **Save**.

Related links

[New / Edit Campaign Attribute page field descriptions](#) on page 171

New / Edit Campaign Attribute page field descriptions

Field or Button	Description
Attribute Name	Type a unique name for the campaign attribute. The maximum allowed length is 80 characters. Campaign attribute name cannot contain the following special characters: @, ~, ` , ! , ' , ; , , # , \ , \$, % , & , (,) , { , } , ? , " , < , > , and space. After you create a campaign attribute, you cannot edit its name.
Data Type	Click a data type for the campaign attribute. The following are the options: • LONG • CURRENCY After you create a campaign attribute, you cannot edit its data type.
Description	Type a description for the campaign attribute. The description cannot contain the following special characters: ^ , ~ , ` , ! , ' , ; , \$, # , \ , < , > , & , "
Delete 	Click to delete the campaign attribute.
Add Attribute	Click to add a new row for adding another campaign attribute.
Save	Click to save the changes.

Related links

[Adding a campaign attribute](#) on page 171

Campaign Attributes page field descriptions

This page displays the list of all existing campaign attributes. Depending on your user role, you can add, edit, or delete the campaign attributes. If a multitenant user creates a campaign attribute, POM associates the campaign attribute to the organization of the user.

Field or Button	Description
New Campaign Attribute	Click to add a new campaign attribute.
Search Attribute	Use to search a campaign attribute.
Filter 	Click to perform advanced search on the campaign attributes.
Column Name	Click the column name based on which you want to perform the advanced search. The following are the options: • Name: To filter the campaign attributes by name. • Data Type: To filter the campaign attributes by data type. • Description: To filter the campaign attributes by description.
Operator	Click the operator you want to use to perform the advanced search. If you select Name or Description in the Column Name field, the following operators are available: • Equal to (=) • Not Equal to (!=) • like • notlike If you select Data Type in the Column Name field, the following operator is available: • Equal to (=)
Search Text	If you select Name or Description in the Column Name field, type the text based on which you want to filter the campaign attributes. If you select Data Type in the Column Name field, click the data type based on which you want to filter the campaign attributes.
Refresh 	Click to clear the search.

Field or Button	Description
Action 	The following are the options: • Edit: To edit the campaign attribute. • Delete: To delete the campaign attribute.
Name	Displays the name of the campaign attribute.
Data Type	Displays the data type of the campaign attribute.
Description	Displays the description of the campaign attribute.

Editing a campaign attribute

About this task

You cannot edit the name and data type of a campaign attribute.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Attributes**.
3. On the Campaign Attributes page, click the Action icon  corresponding to the campaign attribute and click **Edit**.
4. On the *<campaign attribute name>* page, in the **Description** field, edit the description of the campaign attribute.
5. Click **Save**.

Deleting a campaign attribute

About this task

You cannot delete a campaign attribute if any native agent script or reporting table is using the campaign attribute.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Attributes**.
3. On the Campaign Attributes page, click the Action icon  corresponding to the campaign attribute and click **Delete**.
4. On the confirmation message, click **Delete** to delete the campaign attribute.

Completion Codes

Overview

A completion code identifies the outcome of making a phone call or sending an SMS or email message as a part of the campaign.

Completion codes are of two types: system and custom.

POM internally updates the system completion codes for each voice call, SMS message, and email message.

You can also create and associate one or more custom completion codes with a campaign.

Completion codes track the progress of a contact in a campaign cycle.

For example, in a blood donation campaign, when the potential donor answers the call, POM plays a custom Avaya Orchestration Designer application with a message that prompts the potential donor to press 1 if interested or 2 if not interested. When the customer presses 1 or 2, the Avaya Orchestration Designer application updates the appropriate completion code, Interested in Blood Donation or Not interested in Blood Donation, by using the POM Pluggable Data Connectors (PDC).

Do not create a custom completion code with the same name and description as that of a system completion code because this can lead to confusion in identifying the completion codes in the campaign strategy.

For example, if you create a completion code with the name Attempt In Progress, you can see two Attempt In Progress completion codes when creating a campaign strategy. This is because a system completion code with the name Attempt In Progress already exists.

 Note:

For MS SQL database, the completion code is case-insensitive. For example, if you have a completion code CODE1 and another as code1, MS SQL does not recognize the completion codes as two different completion codes. If CODE1 already exists, you cannot add another completion code with the name code1.

The completion codes created by an Org user are accessible only to the users belonging to the organization of the Org user. For an Org user, the completion codes associated with the organization of the user are accessible when creating and editing campaigns and campaign strategies.

A global user has access to all completion codes across all organizations.

A global user is a user who does not belong to any organization and has the POM Administration and POM Campaign Manager roles. An organization user (Org user) is a user who belongs to an organization created in Avaya Experience Portal and has the Org POM Campaign Manager role.

List of system completion codes

The following table lists the system completion codes:

Completion code name	Completion code name in report	Description	Notes
In_Queue	In Queue	In Queue	This completion code is assigned to all contacts which are not processed. You can view this completion code in reports for contacts not attempted for a campaign. This operation can happen when a campaign is stopped or finished before all contacts can be attempted. This completion code is applicable for all types of campaigns. This completion code is assigned to unattempted contacts only when the Ignore Un-attempted contacts from reports check box is selected on the Global Configurations page.
Attempt_In_Progress	Attempt In Progress	Attempt In Progress	POM marks this completion code as temporary code before launching a call, email message, or SMS message and changes the completion code after another completion code is received for the attempt.
Disconnected_By_User	Disconnected By User	Disconnected By User	This completion code is used for notification campaigns only. This completion code is assigned when the called party disconnects the call before the notification is played to the called party.

Table continues...

Completion code name	Completion code name in report	Description	Notes
Disconnected_By_System	Disconnected By System	Disconnected By System	This completion code is assigned when the system disconnects a call during call classification or while playing the nuisance application. For notification campaigns, this completion code is assigned when the system disconnects the call before the notification is played to the called party.
Disconnected_By_User_NuisanceApp	Disconnected By User-NuisanceApp	Disconnected By User-NuisanceApp	This completion code is assigned when a user disconnects a call before an agent interacts with the user while the nuisance application is being played. This completion code is applicable for agent-based campaigns.
Disconnected_By_User_CCA	Disconnected By User-CCA	Disconnected By User-CCA	This completion code is assigned when the user disconnects the call before an agent interacts with the user or before playing the notification during the call classification process. This completion code is applicable for both agent-based and notification campaigns.
Disconnected_By_System_NuisanceApp	Disconnected By System-NuisanceApp	Disconnected By System-NuisanceApp	This completion code is assigned when the system disconnects the call before an agent interacts with the user while the nuisance application is being played. This completion code is applicable for agent-based campaigns.

Table continues...

Completion code name	Completion code name in report	Description	Notes
Disconnected_By_System_CCA	Disconnected By System-CCA	Disconnected By System-CCA	This completion code is assigned when the system disconnects the call before the agent interacts with the user or before playing the notification during the call classification process. This completion code is applicable for both agent-based and notification campaigns.
BgrndAMD_Nuisance_Call	Background AMD Nuisance Call	Delay in connecting agent during Background AMD	This completion code is assigned when the Background AMD property is set to ON and POM is unable to connect to an agent within the compliance timer.
Call_Busy	Call Busy	Call Busy	This completion code is assigned when the status of the call party is detected as busy. This completion code is applicable only for voice campaigns.
Ring_No_Answer	Ring No Answer	Ring No Answer	This completion code is assigned if, during a call in progress, the Driver application receives a ringing event from the MPP within the configured timeout interval. You can set the timeout (in sec) in the Call node of the campaign strategy. POM must receive a ringing indication from the network for assigning the Ring No Answer completion code. This completion code is applicable only for voice campaigns.

Table continues...

Completion code name	Completion code name in report	Description	Notes
Call_Answered	Call Answered	Call Answered	This completion code is assigned when a connect is detected for a call. If Enhanced CCA is ON, the completion code changes depending on the result of further call analysis. When Enhanced CCA is Off, this is the final system completion code for all successful calls. This completion code is applicable only for voice campaigns.
AMD_Application_Played	AMD Application Played	Application Played after Answer Machine Detection	This completion code is assigned when the application on answer machine detection stops playing. POM does not consider the scenario where the application transfers the call to a POM agent or VDN because POM allows retry only when it is sure that customer is available to receive the call again.
Answer_Human	Answer Human	Call Answered (Human)	This completion code is assigned when the CCA engine detects live voice for a call. This completion code cannot be received if Enhanced CCA is Off. This completion code is applicable only for voice campaigns.

Table continues...

Completion code name	Completion code name in report	Description	Notes
Answer_Machine	Answer Machine	Call Answered (Machine)	This completion code is assigned when the CCA engine detects answering machine response for a call. This completion code cannot be received if Enhanced CCA is Off. This completion code is applicable only for voice campaigns.
Sys_Silence_Detected	Silence Detected	Silence Detected	This completion code is assigned if no audio is detected after a connect at the far end (silence). You can provide the following treatment for a silent call in the campaign strategy: • Connect the call to an agent. • Play an application. • Drop the call and retry.
Network_Refusal	Network Refusal	Network Refusal	This completion code is assigned if any error is received from the network for a call. This completion code is applicable only for voice campaigns.
Invalid_Number	Invalid Number	Invalid Number	This completion code is assigned if the address provided is invalid or is blank. This completion code can be received for a voice or SMS-based campaign.
No_Answer	No Answer	Call not answered and no specific result available	This completion code is assigned if the call is not answered and a ringing event is not received at the telephony level.

Table continues...

Completion code name	Completion code name in report	Description	Notes
Fax_Machine	Fax Machine	Call Answered(Fax)	This completion code is assigned when the CCA engine detects a fax machine after the call answer. This completion code is applicable only for voice campaigns.
SIT_Tone	SIT Tone	Special Information Tone	This completion code is assigned when the CCA engine detects Special Information Tones. This completion code is applicable only for voice campaigns.
Reorder_Tone	Reorder Tone	Reorder Tone	This completion code is assigned when the CCA engine detects reorder tone. Network can send reorder tone for various reasons. Consult the service provider for knowing the reason for this code. This completion code is applicable only for voice campaigns.
Max_Attempts_Reached	Max Attempts Reached	Max Attempts Reached	This completion code is assigned when the maximum attempts to connect to the contact is reached.
Email_Queued	Email Queued	Email Queued	This completion code is assigned when POM sends an email message to Experience Portal.
Email_Sent	Email Sent	Email Sent	This completion code is assigned when the Experience Portal system successfully sends the email message.

Table continues...

Completion code name	Completion code name in report	Description	Notes
Email_Delivered	Email Delivered	Email Delivered	This completion code is assigned when the system successfully delivers the email message to the recipient address specified by the sender, which includes delivery to a mailing list exploder. It does not indicate that the message is read.
Email_Failed	Email Failed	Email Failed	This completion code is assigned when the system cannot deliver the email message to the recipient. The Reporting MTA has abandoned any attempts to deliver the message to this recipient. No further notifications must be expected.
Email_Expanded	Email Expanded	Email Expanded	This completion code is assigned when the system successfully delivers the email message to the recipient as specified by the sender, but forwarded by the Reporting-MTA beyond that destination to multiple additional recipient addresses.
Email_Relayed	Email Relayed	Email Relayed	This completion code is assigned when the system relays the message into an environment that does not accept responsibility for generating DSNs on successful delivery.
Email_Delayed	Email Delayed	Email Delayed	This completion code is assigned when the system indicates that the Reporting MTA has so far been unable to deliver or relay the message, but continues to attempt to do so.

Table continues...

Completion code name	Completion code name in report	Description	Notes
Email_Couldnot_Send	Email could not be sent	Email Couldnot Send	This completion code is assigned when the Experience Portal system cannot send the email message because of some unknown error.
Email_Couldnot_Deliver	Email could not be delivered	Email Couldnot Deliver	This completion code is assigned when POM does not deliver the email message because of some unknown error.
SMS_Queued	SMS Queued	SMS Queued	This completion code is assigned when an SMS message is given to the SMS Server for sending. This completion code is usually the first completion code for an SMS. This completion code is applicable only for SMS campaigns.
SMS_Sent	SMS Sent	SMS Sent	This completion code is assigned when the SMS server receives a response from the SMPP Service provider for the sent SMS message. The SMPP service provider sends this response acknowledging the receipt of SMS message on the SMPP Server end. This completion code is applicable only for SMS campaigns.
SMS_Delivered	SMS Delivered	SMS Delivered	This completion code is assigned when a delivery report is received for an SMS message. This completion code is received only if Delivery Receipts is enabled when configuring the SMPP connection. This completion code is applicable only for SMS campaigns.

Table continues...

Completion code name	Completion code name in report	Description	Notes
SMS_Failed	SMS Failed	SMS Failed	This completion code is assigned when the POM system fails to send the SMS message. This completion code is applicable only for SMS campaigns.
SMS_Buffered	SMS Buffered	SMS Buffered	This completion code is assigned when the POM system buffers the SMS message.
SMS_Rejected	SMS Rejected	SMS Rejected	This completion code is assigned when the SMS message is rejected from SMPP server.
SMS_Couldnot_Send	SMS could not be sent	SMS Couldnot Send	This completion code is assigned when the POM system cannot send the SMS message.
SMS_Couldnot_Deliver	SMS could not be delivered	SMS Couldnot Deliver	This completion code is assigned when the POM system cannot deliver the SMS message.
Media_Server_Failure	Media Server Failure	Media Server Failure	This completion code is assigned when POM fails to invoke the media server for a contact attempt. Some of the reasons for this can be server is not functional or server is not reachable. This completion code is received only when the On Media Server Failure option is set to no-retry in the campaign strategy. This completion code is applicable for all types of campaigns.
General_Failure	General Failure	General Failure	This completion code is assigned when POM encounters a general error.

Table continues...

Completion code name	Completion code name in report	Description	Notes
Restricted_DNC	Restricted DNC	Not called as DNC is ON	This completion code is assigned when the DNC restriction is ON in the rule or campaign strategy, and the contact address is included in the DNC list. This completion code is applicable for all types of campaigns.
Restricted_Other	Restricted Other	Detected Restriction	This completion code is assigned when a permanent restriction mentioned in the rule or campaign strategy is applicable for a given contact. This completion code is applicable for all types of campaigns.
Invalid_Address	Invalid Address	Address is Invalid	This completion code is assigned when the email address specified is invalid. This completion code is applicable only for email campaigns.
Attempt_Timeout	Attempt Timeout	No Completion Code Received	This completion code is assigned when the actual attempt is timed out. This completion code is applicable only for agent-based campaigns. It is valid for scenarios when the Experience Portal service to launch CCXML fails for campaigns other than manual pacing type campaign or the Agent Manager is down for manual campaign.

Table continues...

Completion code name	Completion code name in report	Description	Notes
Application_Error	Application Error	Error occurred while starting application	This completion code is assigned if an error is received when starting an application assigned to a call campaign. This completion code is received before the call is made, preventing the call from starting in error conditions. The following are the possible reasons for this completion code: • The application server hosting the application is not functional, is overloaded, or is not reachable. • The application has errors and cannot start. This completion code is applicable only for voice campaigns.
Custom_Invoke_Done	Custom Invoke Finished	Custom Invoke Finished	This completion code is assigned when the custom invoke is finished for custom pacing.
Rejected_By_Selector	Rejected by Selector	Contact was moved to done at selector state	This completion code is assigned when POM moves the contact to Done at the Selector state. This completion code is applicable only for agent-based campaigns.
Reject_In_Preview	Reject In Preview	Rejected in preview by agent	This completion code is assigned when the agent rejects the contact in the preview state. This completion code is applicable only for agent-based campaigns.

Table continues...

Completion code name	Completion code name in report	Description	Notes
Preview_In_Progress	Preview In Progress	Preview is in progress by an agent	This completion code is assigned when the agent is previewing the contact. This completion code is applicable only for agent-based campaigns.
Callback_Expired	Callback Expired	No callback could be made as expiry time has passed	This completion code is assigned when POM cannot callback because the callback time has passed. This completion code is applicable only for agent-based campaigns.
Callback_Terminated	Callback Terminated	Callback terminated as the campaign was stopped/finished	This completion code is assigned when POM cannot call back because the campaign is stopped or finished. This completion code is applicable only for agent-based campaigns.
Callback_Postponed	Callback Postponed	Callback postponed as there were no agents available to handle it	This completion code is assigned when no agents are available for the callback. This completion code is applicable only for agent-based campaigns.
Callback_Inqueue	Callback Queued	Callback is in queue of an agent	This completion code is assigned when the callback is assigned to a busy agent. This completion code is applicable only for agent-based campaigns.
Desktop_Error	Desktop Error	Agent desktop error while processing the contact	This completion code is assigned when you get an error on the agent desktop while processing the contact information. This completion code is applicable only for agent-based campaigns.

Table continues...

Completion code name	Completion code name in report	Description	Notes
Disconnected_by_agent	Agent Disconnect	Agent disconnected customer call in dialing state	This completion is assigned when the agent disconnects the call in a dialing state. This completion code is applicable only for agent-based campaigns.
Restricted_by_24_hours_AMD	Restricted by 24 hours AMD	Contact restricted due to 24 hours AMD system rule	This completion code is assigned when the 24Hour AMD system rule restricts a contact.
Restricted_by_72_hours_Nuisance	Restricted by 72 hours Nuisance	Contact restricted due to 72 hours nuisance system rule	This completion code is assigned when the 72Hours NUISANCE system rule restricts a contact.
Rule_Engine_Execution_Failure	Rule Engine Execution Failure	Contact restricted because of error in rule execution	This completion code is assigned when a rule execution error restricts a contact.
Contact_Excluded	Contact Excluded	Callback/Retry terminated as the contact was excluded	This completion code is assigned when a contact is restricted because it is present in the exclusion list.
Rejected_Due_To_Attempt_Already_In_Progress	Rejected Due To Attempt Already In Progress	Contact is rejected by rule engine as already in progress	This completion code is assigned if the rule engine restricts a contact/address when the contact/address is in progress.
Call_Waiting	Call Waiting	Call Waiting	This completion code is deprecated.
Attempt_Skip_By_Agent	Attempt Skip By Agent	Contact attempt is skip due to new attempt creation	This completion code is assigned when contact attempt is skipped due to new attempt creation.
Contact_Address_Empty	Contact Address Empty	Contact attempt cannot be made due to empty contact address	This completion code is assigned when the contact attempt cannot be made because of an empty contact address.
All_Contact_Addresses_Empty	All Contact Addresses Empty	Contact attempt cannot be made because all the addresses have no value	This completion code is assigned when contact attempt cannot be made because all the addresses have no value.

Table continues...

Completion code name	Completion code name in report	Description	Notes
Restricted_By_Time	Restricted By Time	Not called as Time Restriction is ON	This completion code is assigned when contact is not called as the time restriction is ON.
DC_Service_Error	DC Service Error	After DC failover mark all attempts with agent	This completion code is assigned to all call attempts which were with the agents during data center failover.
Nuisance_Call	Nuisance Call	No agent found for the call	This completion code is assigned when no agent is found for the call.
End_of_Address_List	End of Address List	End of Address List	When POM reaches the last address on the Retry node of a campaign strategy when making retry attempts, POM marks the attempt with this completion code.
Restricted_By_Holiday	Restricted By Holiday	Restricted By Holiday	This completion code is assigned when a contact cannot be dialed because of a holiday restriction that is configured and assigned to a campaign.
Sys_Call_Forbidden	Call Forbidden	Sys_Call_Forbidden	This completion code is assigned when the call fails with reason no route, and SIP response code 403 is received from the telephony platform.

Table continues...

Completion code name	Completion code name in report	Description	Notes
Sys_No_Callable_Address	No Callable Address	No Callable Address	For each record, POM evaluates the phone numbers or email addresses configured in the campaign strategy for minimum and maximum contact time and guard time restrictions. POM also verifies the value of the Restrict On No Suitable Address property in the campaign strategy. If POM cannot attempt any of the phone numbers or email addresses of the record because of minimum and maximum contact time and guard time restrictions and if the Restrict On No Suitable Address property is set to No, then POM assigns this completion code to the record. For a callback record, at the time of the callback, if the minimum and maximum contact time and guard time restrictions are not met, POM postpones the callback and assigns this completion code to the record.

Adding a completion code

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Completion Codes**.
3. On the Completion Codes page, click **New Completion Code**.
4. On the New Completion Codes page, add the relevant details.
5. Click **Save**.

Add or Edit Completion Codes page field descriptions

Field or Button	Description
Name	Type a unique name for the completion code. Ensure that the name does not match the name of a system completion code. The maximum allowed length is 80 characters. Completion code name cannot contain the following special characters: ^, ~, `, !, ', ;, \$, #, \, <, >, &, " After you create a completion code, you cannot edit its name.
Description	Type a description for the completion code. The description cannot contain the following special characters: ^, ~, `, !, ', ;, \$, #, \, <, >, &, "
RPC	Select this check box to determine the total Right Party Connect count for the completion code. For example, you can select the RPC check box for a blood donation campaign to mark all contacts with whom you successfully connect. You can use this option only for custom completion codes. The count is shown in the Completion Code Summary reports and Supervisor Dashboard.
Success	Select this check box to determine the total Success count for the completion code. For example, you can select the Success check box for a blood donation campaign to mark all contacts who want to donate blood. You can use this option only for custom completion codes. The count is shown in the Completion Code Summary reports and Supervisor Dashboard.
Closure	Select this check box to determine the total Closure count for the completion code. For example, you can select the Closure check box for a blood donation campaign to mark all contacts who provide their responses, either to donate or not to donate blood, and no further action is required. You can use this option only for custom completion codes. The count is shown in the Completion Code Summary reports and Supervisor Dashboard.
AMA	Select this check box to determine the total number of calls marked by an agent as Answer Machine By Agent for the completion code. You can use this option only for custom completion codes. The AMA option allows you to calculate falsely detected live voice calls that are actually answered by an answering machine. POM considers completion codes that are marked by an agent for predictive and progressive campaigns only. The count is shown in the Campaign Detail report and Supervisor Dashboard.

Table continues...

Field or Button	Description
SIP	Select this check box to create a SIP type of completion code. SIP type of completion codes can only be created by an administrator user and are applicable system wide to all organizations. These completion codes are meant for mapping with SIP codes. If you enable this option, other options (RPC, Success, Closure, AMA) get disabled.
Delete 	Click to delete the completion code.
Add Completion Code	Click to add a new row for adding another completion code.
Save	Click to save the completion code.

Completion Codes page field descriptions

Field or Button	Description
New Completion Code	Click to add a new completion code.
Delete	To delete multiple completion codes, select the completion codes and click Delete .
Search Completion Code	Use to search a completion code by its ID or name.
Filter 	Click to perform advanced search on the completion codes.
Column Name	Click the column name based on which you want to perform the advanced search. The following are the options: • Completion Code: To filter the completion codes by name. • RPC: To filter the completion codes based on whether the RPC option is enabled or disabled for the completion codes. • Success: To filter the completion codes based on whether the Success option is enabled or disabled for the completion codes. • Closure: To filter the completion codes based on whether the Closure option is enabled or disabled for the completion codes. • AMA: To filter the completion codes based on whether the AMA option is enabled or disabled for the completion codes.

Table continues...

Field or Button	Description
Operator	Click the operator you want to use to perform the advanced search. If you click Completion Code in the Column Name field, the following operators are available: • Equal to (=) • Not Equal to (!=) • in • like • not like If you click RPC, Success, Closure, or AMA in the Column Name field, the following operator is available: • Equal to (=)
Search Text	If you select Completion Code in the Column Name field, type the completion code name based on which you want to filter the completion codes. If you select RPC, Success, Closure, AMA in the Column Name field, click any of the following: • true: To filter the completion codes for which the option selected in the Column Name field is enabled. • false: To filter the completion codes for which the option selected in the Column Name field is disabled.
Refresh 	Click to clear the search.

Field or Button	Description
Actions 	The following are the options: • Edit: Click to edit the completion code. • Delete: Click to delete the completion code.
ID	Displays the unique ID of the completion code.
Completion Code	Displays the name of the completion code.
RPC	Displays whether the RPC (Right Party Connect) option is enabled for the completion code.
Success	Displays whether the Success option is enabled for the completion code.
Closure	Displays whether the Closure option is enabled for the completion code.
AMA	Displays whether the AMA (Answer Machine by Agent) option is enabled for the completion code.
SIP	Displays only to an administrator user whether the SIP option is enabled for the completion code.
Description	Displays the description of the completion code.

 Note:

Only an administrator user can:

- See SIP type of completion codes.
- Add, edit, or delete SIP type of completion codes.

Editing a custom completion code

About this task

You cannot edit the name of a custom completion code.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Completion Codes**.
3. On the Completion Codes page, click the Actions icon  corresponding to the custom completion code and click **Edit**.
4. On the *<completion code name>* page, modify the details.
5. Click **Save**.

Deleting custom completion codes

About this task

You cannot delete a custom completion code in the following scenarios:

- The completion code is part of a campaign strategy. In such cases, you must remove the association with the campaign strategy and then delete the completion code.
- The completion code is associated with a campaign. In such cases, you must remove the association with the campaign and then delete the completion code.
- The completion code is associated with an Avaya Orchestration Designer application created by using the PDC nodes. In such cases, you must remove the association with the Avaya Orchestration Designer application and then delete the completion code.
- The completion code is associated with the campaign history and contact history. In such cases, you must purge the campaign data and then delete the completion code.
- The completion code is a part of historical information stored in the database.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Completion Codes**.
3. On the Completion Codes page, do one of the following:
 - To delete a completion code, click the Actions icon  corresponding to the completion code and click **Delete**.

- To delete multiple completion codes, select the completion codes and click **Delete**.
4. On the confirmation message, click **Delete**.

Campaign strategy

Overview

A campaign strategy is mandatory for creating and running a campaign. Campaign strategy is the backbone of any campaign.

You can create a campaign strategy by using nodes, such as, Handler, Call, and Address nodes. Each node generates an XML code.

To define various actions to take place on a contact record during a campaign, use a Handler in the campaign strategy. In the Handler, you can choose the task node as Call, SMS, Email, or Custom to notify the contact.

You can also specify various rules for a specific contact record such as time restrictions and number of retries.

In the campaign strategy, you can specify the applications to be used or personalized notifications texts to be sent to the contacts.

You can define the pacing type for a campaign in the campaign strategy.

Use campaign strategy to:

- Define the channel, such as voice, SMS, email, or custom, to communicate with the contact.
- Allow flexibility when using different phone numbers at different times. For example:
 - Call Joe on the home phone number from 6:00 A.M. to 8:00 A.M., call the work phone number from 8:00 A.M. to 4:00 P.M., and call the home phone number from 4:00 P.M. to 6:00 P.M.
 - Send an SMS message on Frank's work phone number and wait for 4 hours to receive a reply. In case no reply is received, call Frank on the home phone number.
- Define the Avaya Orchestration Designer applications to play for a live voice and an answering machine. When you use the Avaya Orchestration Designer applications, you can give differential treatment depending on whether the call is answered by a live voice or an answering machine.

For example, if a live voice answers the call, the Avaya Orchestration Designer application transfers the call to an agent. If an answering machine answers the call, the Avaya Orchestration Designer application plays a notification message.

- Define the retry parameters for unsuccessful attempts such as Call Busy and Ring No Answer.
- Allow override of Attribute and System Restrictions rule based on certain opt-ins.

For example, if any contact has set Attribute and System Restrictions rule to not call a contact registered in the DNC list.

Another example is where a campaign strategy for salary notification might override the DNC-related Attribute and System Restrictions rule based on the Salary notification opt-in field set for each contact.

A campaign strategy can be in any one of the following states: completed (final), draft, or template.

You can create an entirely new campaign strategy or use any of the predefined campaign strategy templates.

For more information about the predefined campaign strategy templates, see [Predefined campaign strategy templates](#) on page 196.

You can also create a strategy to first play a notification using the AvayaAgent application or a custom Avaya Orchestration Designer application, and later transfer the call to a nailed POM agent. You can achieve this by transferring the call as blind transfer to tel:AvayaPOMAgent. In such a strategy, the call pacing can be any agent pacing such as Progressive, ECR or Cruise Control.

 Note:

A global user has access to all campaign strategies across all organizations. An Org user has access to campaign strategies that are created by the users belonging to the specific organization. For more information about multitenancy, see *Avaya Experience Portal* documentation.

A global user is a user who does not belong to any organization and is assigned the POM Administration and POM Campaign Manager roles. An organization user (Org user) is a user who belongs to an organization created in Avaya Experience Portal and is assigned the Org POM Campaign Manager role.

Import and export campaign strategies

You can export a campaign strategy from one POM Server as an .xml file and import it on another POM server for reuse. You can import or export the files that are generated by using the POM environment only. The import fails if the file is modified after the export. When importing a campaign strategy, you can specify a new name for the campaign strategy. If you do not specify a new name, POM saves the campaign strategy with the name of .xml file. For more information, see [Campaign Strategies page field descriptions](#) on page 212.

 Caution:

If you have used the Call Answered completion code when Enhanced CCA is turned on in the POM 2.0 campaign strategy and you are importing the campaign strategy from POM 2.0 to POM 3.0.3 or later, an error occurs when saving the campaign strategy. To save the campaign strategy in POM 3.0.3 or later, change the completion code to Answer Human.

If an ECR type of campaign strategy is created before POM 3.0.3 using Japanese or French locales, you must recreate the strategy after upgrading to POM 3.0.3 or later.

Strategy behavior limitation

You cannot modify the number of handlers and pacing type of the strategy if it is associated with an active or paused campaign (campaign states other than **Completed**, **Creating History** and **Completed**).

The following parameters are locked in the strategy:

- Add or remove existing handler

- Pacing type

Predefined campaign strategy templates

The following table provides information about the predefined campaign strategy templates you can use for creating campaign strategies with various pacing types:

Campaign pacing type	Predefined campaign strategy template	Notes
Manual dialing	Manual Template	Use a manual campaign strategy to use the Manual Dialing feature. The Manual Dialing feature allows agents to dial a customer number through Workspaces, or third-party software or device, and record the details of the call in POM.  Note: POM systems that are enabled only for manual dialing can run only manual and email type of campaigns. In case of a multi-handler campaign strategy, ensure the campaign strategy does not contain handlers with predictive, preview, and SMS pacing type. Ensure the following in the Call node: • The Call Pacing Type property is set to Manual. • Set the Timed Preview property as appropriate. If the agents use Workspaces to dial the contacts, set the Timed Preview option to No. All CCA parameters, Driver Application, Nailer Application, Nuisance Call Application, and On Hold Application in the Call node are disabled by default and cannot be enabled.
Call	Simple Call	Use this template to create a campaign strategy for voice calls. Ensure the following in the campaign strategy: • In the Text Item node, specify a value for the Text property. You can also delete the Notification Text and Text Item nodes if you do not want to configure any notification text. • In the Call node, select the driver application in the Driver Application property. You must add the PomDriverApp application through the EPM application menu before using it.

Table continues...

Campaign pacing type	Predefined campaign strategy template	Notes
Email	Simple Mail	Use this template to create a campaign strategy for sending email messages. Ensure the following in the campaign strategy: • In the Text Item node, do the following: - In the Text property, specify the email message you want to send. - In the Subject property, specify the subject of the email message. • In the Mail node, ensure the following: - Select the application in the Mail Application property. You must add the AvayaPOMEmail application through the EPM application menu before using it. - In the Sender's Address property, specify a valid sender's email address as configured in the EPM email connection configuration. • In the Result Processor node, set the Next State property to <code>wait</code>. In the Result node for email delivered, set the Next State property to <code>done</code>. For more information about capacity and pacing of email messages in Avaya Experience Portal, see the Avaya Experience Portal documentation.

Table continues...

Campaign pacing type	Predefined campaign strategy template	Notes
SMS	Simple SMS	Use this template to create a campaign strategy for sending SMS messages. Ensure the following in the campaign strategy: - In the Text property of the Text Item node, specify the SMS message you want to send. - In the SMS node, ensure the following: - Select the application in the SMS Application property. You must add the AvayaPOMSMS application through the EPM application menu before using it. - In the Sender's Address property, specify a valid sender's SMS address (long number or short code) as configured in the EPM SMS connection configuration. - In the Result Processor node, set the Next State property to <code>wait</code>. In the Result node for SMS message delivered, set the Next State property to <code>done</code>. For more information about capacity and pacing of SMS messages in Avaya Experience Portal, see the Avaya Experience Portal documentation.
Time-based call campaign	Time Based Call Template	Use this template to create a campaign strategy for voice calls with time-based pacing. Ensure the following in the campaign strategy: - In the Text property of the Text Item node, specify the TTS text you want to play. - In the Call node, ensure the following: - Set the Driver Application property to PomDriverApp. You must add the PomDriverApp application through the EPM application menu before using it. - Specify a value for the Call Pace property. You can specify any value between 1 and 1000000. - Specify a value for the Call Pace Time Unit property in seconds, minutes, or hours.

Table continues...

Campaign pacing type	Predefined campaign strategy template	Notes
Time-based SMS campaign	Simple SMS	Use this template to create a campaign strategy for sending SMS messages with time-based pacing. Ensure the following in the campaign strategy: - In the Text property of the Text Item node, specify the SMS message you want to send. - In the SMS node, ensure the following: - In the SMS Application property, select the AvayaPOMSMS application. You must add the AvayaPOMSMS application through the EPM application menu before using it. - In the Sender's Address property, type a valid sender's SMS address (long number or short code) as configured in the EPM SMS connection configuration. - In the SMS Pacing Types property, click Time Based. - Specify a value for the SMS Pace property. You can specify any value between 1 and 1000000. - Specify a value for the SMS Pace Time Unit property in seconds, minutes, or hours. - In the Result Processor node, set the Next State property to <code>wait</code>. In the Result node for SMS message delivered, set the Next State property to <code>done</code>. For more information about capacity and pacing of SMS messages in Avaya Experience Portal, see the Avaya Experience Portal documentation.

Table continues...

Campaign pacing type	Predefined campaign strategy template	Notes
Time-based email campaign	Simple Mail	Use this template to create a campaign strategy for sending email messages with time-based pacing. Ensure the following in the campaign strategy: - In the Text Item node, do the following: - In the Text property, specify the email message you want to send. - In the Subject property, specify the subject of the email message. - In the Mail node, ensure the following: - In the Mail Application property, select the AvayaPOMEmail application. You must add the AvayaPOMEmail application through the EPM application menu before using it. - In the Sender's Address property, specify a valid sender's email address as configured in the EPM email connection configuration. - In the Email Pacing Types property, click Time Based. - Specify a value for the Pace property. You can specify any value between 1 and 1000000. - Specify a value for the Mail Pace Time Unit property in seconds, minutes, or hours. - In the Result Processor node, set the Next State property to <code>wait</code>. In the Result node for email message delivered, set the Next State property to <code>done</code>. For more information about capacity and pacing of email messages in Avaya Experience Portal, see the Avaya Experience Portal documentation.

Table continues...

Campaign pacing type	Predefined campaign strategy template	Notes
Skill-based call campaign	Skill Based Call Template	Use this template to create a campaign strategy for voice calls with skill-based pacing. You cannot create a skill-based call campaign strategy if you have configured POM in Oceana mode. Ensure the following in the campaign strategy: • In the Text Item node, specify a value for the Text property. • In the Call node, ensure the following: - In the Driver Application property, click PomDriverApp. You must add the PomDriverApp application through the EPM application menu before using it. - In the Skill property, click the skill. If POM is configured in the CCElite mode, the Skill property shows all skills you have added as Inbound in POM by using the CCElite configuration page. If POM is configured in the AACC mode, the Skill property shows all voice skills configured in AACC. - In the Parameter property, click the pacing parameter to consider for the skill-based pacing. For example, Queue Length. - Specify a value for the Desired Value property. You can specify an optimum value between 70% and 100%. This range can vary depending on the parameter you select in Parameter property. - Specify a value for the Initial Pace property. You can specify any value between 1 and 9999. - Specify a value for the Pace Interval property. You can specify any value between 1 and 9999. - Specify a value for the Pacing Variation (%) property. - Specify a value for the Max Pace property. • In the Address node, select the contact attributes in the Contact Attribute property. • In the Avaya Notify node, select the text ID in the Text ID property. • In the Result Processors node, set a value for the Next State property.

Table continues...

Campaign pacing type	Predefined campaign strategy template	Notes
Skill-based SMS campaign	Skill Based SMS Template	Use this template to create a campaign strategy for sending SMS messages with skill-based pacing. You cannot create a skill-based SMS campaign strategy if you have configured POM in Oceana mode. Ensure the following in the campaign strategy: - In the Text property of the Text Item node, specify the SMS message you want to send. - In the SMS node, ensure the following: - In the SMS Application property, click the SMS application. You must add the SMS application through the EPM application menu before using it. - In the Skill property, click the skill. - In the Parameter property, click the pacing parameter. - Specify a value for the Desired Value property. You can specify an optimum value between 70% and 100%. This range can vary depending on the parameter you select in Parameter property. - Specify a value for the Initial Pace property. You can specify any value between 1 and 9999. - Specify a value for the Pace Interval property. You can specify any value between 1 and 9999. - Specify a value for the Pacing Variation (%) property. - Specify a value for the Max Pace property. - In the Address node, select the contact attributes in the Contact Attribute property. - In the Avaya Notify node, select the text ID in the Text ID property. - In the Result Processor node, set the Next State property to <code>wait</code>. In the Result node for SMS message delivered, set the Next State property to <code>done</code>. For more information about capacity and pacing in Avaya Experience Portal, see the Avaya Experience Portal documentation.

Table continues...

Campaign pacing type	Predefined campaign strategy template	Notes
Skill-based email campaign	Skill Based Email Template	Use this template to create a campaign strategy for sending email messages with skill-based pacing. You cannot create a skill-based email campaign strategy if you have configured POM in Oceana mode. Ensure the following in the campaign strategy: • In the Text Item node, do the following: - In the Text property, specify the email message you want to send. - In the Subject property, specify the subject of the email message. • In the Mail node, ensure the following: - In the Mail Application property, click the mail application. You must add the mail application through the EPM application menu before using it. - In the Skill property, click the skill. - In the Parameter property, click the pacing parameter. - Specify a value for the Desired Value property. You can specify an optimum value between 70% and 100%. This range can vary depending on the parameter you select in Parameter property. - Specify a value for the Initial Pace property. You can specify any value between 1 and 9999. - Specify a value for the Pace Interval property. You can specify any value between 1 and 9999. - Specify a value for the Pacing Variation (%) property. - Specify a value for the Max Pace property. • In the Address node, select the contact attributes in the Contact Attribute property. • In the Avaya Notify node, select the text ID in the Text ID property. • In the Result Processor node, set the Next State property to <code>wait</code>. In the Result node for email message delivered, set the Next State property to <code>done</code>.

Table continues...

Campaign pacing type	Predefined campaign strategy template	Notes
		For more information about capacity and pacing in Avaya Experience Portal, see the Avaya Experience Portal documentation.
Call campaign with Cruise Control pacing type	Cruise Control Template	Use this template to create a call campaign with cruise control pacing type. In the Call node, ensure the following - In the Driver Application property, click PomDriverApp. You must add the POM driver, nailer, and other POM applications through the EPM application menu before using them. - In the Nailer Application property, click the nailer application you want to use. - In the Nuisance Call Application property, click the nuisance call application you want to use. - In the On Hold Application property, click the on-hold application you want to use. - Specify a value for the Desired Service Level property. You can specify an optimum value between 70% and 100%. - In the Min. Agents property, type an appropriate value between 0 and 9999. - In the Max. Agents property, type an appropriate value between 1 and 9999. - In the Agent Outbound Skill property, select an outbound skill. If POM is configured in the CCElite mode, the Agent Outbound Skill property shows all skills you have added as Outbound in POM by using the CCElite configuration page. If POM is configured in the AACC mode, the Agent Outbound Skill property shows all POM outbound skills you have configured in AACC. - In the ACW Time (Sec) property, type an appropriate value. - In the Default Completion Code field, click a default completion code. POM assigns the default completion code to a call if the agent does not provide a completion code for the call.

Table continues...

Campaign pacing type	Predefined campaign strategy template	Notes
Call campaign with Expert Call Ratio pacing type	Expert Call Ratio Template	Use this template to create a call campaign with expert call ratio pacing type. In the Call node, ensure the following: - In the Driver Application property, click PomDriverApp. You must add the POM driver, nailer, and other POM applications through the EPM application menu before using them. - In the Nailer Application property, click the nailer application you want to use. - In the Nuisance Call Application property, click the nuisance call application you want to use. - In the On Hold Application property, click the on-hold application you want to use. - In the Expert Call Ratio Type property, click the appropriate value. The options are: Agent Work Time and Agent Update Time. - If you select Agent Work Time, you can specify any value between 1 and 100. The optimum values are between 29 and 71. - If you select Agent Update Time, you can specify any value between 1 and 100. The optimum values are between 32 and 78. - In the Value (%) field, type an appropriate value between 0 and 100. - In the Initial Hit Rate (%) field, type an appropriate value.  Tip: The Initial Hit Rate specifies the average number of calls per agent that POM makes during the first five minutes of the job. The initial hit rate is the number of calls completed compared with the call attempts. If you set the rate too low, between 20 and 30, the dialer can make more connects than the agents can handle. If you set the rate too high, above 70, POM can fail to make enough connections to keep the agents busy. - In the Maximum Hit Rate (%) field, type an appropriate value between 1 and 100.

Table continues...

Campaign pacing type	Predefined campaign strategy template	Notes
		• In the Min. Agents property, type an appropriate value between 0 and 9999. • In the Max. Agents property, type an appropriate value between 1 and 9999. • In the Agent Outbound Skill property, select an outbound skill. The Agent Outbound Skill property shows all skills you have added as Outbound in POM by using the CCElite configuration page. • In the ACW Time (Sec) property, type an appropriate value. • In the Default Completion Code field, click a default completion code. POM assigns the default completion code to a call if the agent does not provide a completion code for the call.

Table continues...

Campaign pacing type	Predefined campaign strategy template	Notes
Preview campaign	Preview Template	Use this template to create a preview campaign. Ensure the following in the campaign strategy: • In the Text Item node, specify a value for the Text property. • In the Call node, ensure the following: - In the Driver Application property, click PomDriverApp. You must add the POM driver, nailer, and other POM applications through the EPM application menu before using them. - In the Nailer Application property, click the nailer application you want to use. - In the Nuisance Call Application property, click the nuisance call application you want to use. - In the On Hold Application property, click the on-hold application you want to use. - Set the Timed Preview property as appropriate. - In the Min. Agents property, type an appropriate value between 0 and 9999. - In the Max. Agents property, type an appropriate value between 1 and 9999. - In the Agent Outbound Skill property, select an outbound skill. The Agent Outbound Skill property shows all skills you have added as Outbound in POM by using the CCElite configuration page. - In the ACW Time (Sec) property, type an appropriate value. - In the Default Completion Code field, click a default completion code. POM assigns the default completion code to a call if the agent does not provide a completion code for the call.

Table continues...

Campaign pacing type	Predefined campaign strategy template	Notes
Progressive campaign	Progressive Template	Use this template to create a progressive campaign. Ensure the following in the campaign strategy: In the Call node, ensure the following: - In the Driver Application property, click PomDriverApp. You must add the POM driver, nailer, and other POM applications through the EPM application menu before using them. - In the Nailer Application property, click Nailer. - In the Nuisance Call Application property, click the nuisance call application you want to use. - In the On Hold Application property, click the on-hold application you want to use. - In the Over Dial Ratio property, type an appropriate value between 1 and 100. - In the Min. Agents property, type an appropriate value between 0 and 9999. - In the Max. Agents property, type an appropriate value between 1 and 9999. - In the Agent Outbound Skill property, select an outbound skill. The Agent Outbound Skill property shows all skills you have added as Outbound in POM by using the CCElite configuration page. - In the ACW Time (Sec) property, type an appropriate value. - In the Default Completion Code field, click a default completion code. POM assigns the default completion code to a call if the agent does not provide a completion code for the call.

Table continues...

Campaign pacing type	Predefined campaign strategy template	Notes
Multiple addresses retry campaign	Multiple Addresses Retry Template	Use this template to provide alternate contact details if you want POM to try connecting to a contact by using more than one address. For example, you have specified 2 phone numbers, and you want POM to try establishing a connection using both the numbers. Ensure the following in the campaign strategy: • In the Text Item node, specify a value for the Text property. • In the Call node, in the Driver Application property, click PomDriverApp. You must add the PomDriverApp application through the EPM application menu before using it. • In the Address node, select the contact attributes in the Contact Attribute property. • In the Result Processors node, set values for the Next State and Custom Processor properties. • In the Result (Answer Human) node, set values for the Value and Next State properties. • In the Retry node, set values for the Count, Interval (sec), and FailState properties. You can specify any value from 1 to 100 for the Count property, and 0 to 172800 seconds for the Interval (sec) property.
Multi-channel campaign	Multiple Channel Selector	Use this template to specify any condition in the campaign strategy and change the behavior of the campaign according to the condition. For example, you want to make voice calls from 9:00 A.M. to 5:00 P.M. However, after 6:00 P.M., you want to send SMS message to the contact. Ensure the following in the campaign strategy: • In the Text Item node, specify a value for the Text property. • Use the Selector node to specify the conditions.

Creating a campaign strategy

About this task

Use this procedure to create a campaign strategy.

You can also save the strategy as draft if the strategy is incomplete or contains errors that you want to resolve later.

You cannot use draft strategies in a campaign.

For more information, see [Saving a campaign strategy as draft](#) on page 214.

 Note:

If you use a predefined template for creating a campaign strategy, POM sets the allocation type for handlers to Dynamic.

For more information on reserved and dynamic allocation of ports, see *Avaya Proactive Outreach Manager Overview and Specification*.

Before you begin

Enable pop-up on your browser.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Strategies**.
3. On the Campaign Strategies page, click **Add**.
4. In the **Name** field, type a name for the campaign strategy.
5. Select the **Use template** check box if you want to use a campaign strategy template as the base for creating the campaign strategy.
6. In the **Template** field, click the template you want to use as the base for creating the campaign strategy.

The **Template** field displays the predefined and user-defined templates.

7. Click **Continue**.
8. On the Campaign Strategy Editor page, do the following to configure the campaign strategy:
 - a. Drag a node from the **Selected Node** area to the **Campaign Strategy** area. You can also right-click a node in the **Campaign Strategy** area and select the node you want to add under the node by using the **Add Node** option.

The **Selected Node** area displays the nodes that are permitted under the node you select in the **Campaign Strategy** area.
 - b. In the **Campaign Strategy** area, select each node and set its properties in the **Property** area.
9. Do one of the following:
 - Click **SAVE** to save the campaign strategy.
 - Click **SAVE DRAFT** if you want to save the strategy as draft.

Campaign Strategy Editor page field descriptions

Use this editor to design the campaign strategy.

Field or Button	Description
Show Tool Box/Hide Tool Box	Use the toggle button to show or hide the left pane of the campaign strategy editor.
Show Source / Show Design	Use the toggle button to view the source or the XML format of the campaign strategy. Each node generates an XML code. The Show Source option displays the XML code in a read-only format.
Save	Use to save the campaign strategy.  Note: If there are errors in the campaign strategy, POM does not save the campaign strategy.
Save Draft	Use to save the campaign strategy in draft mode, even if there are errors in the campaign strategy.
Copy	Use to copy the selected node to the clipboard.
Paste	Use to paste the selected node from the clipboard.
Delete	Use to delete the selected node.

The campaign strategy editor contains the following four panes:

- Left pane: Shows the list of valid child nodes for the node that you select in the campaign strategy in the middle pane.

You can drag-and-drop these child nodes under the selected node in the campaign strategy.

The left pane does not display nodes if the selected node cannot contain any child node.

- Middle pane: Use this pane to add the nodes and create the campaign strategy.

Right-clicking a node in the campaign strategy shows the following options:

- **Add Node:** Shows the list of valid child nodes for the current selected node. You can click a child node to add the node under the current selected node.

The **Add Node** option is unavailable for nodes that cannot contain child nodes.

- **Copy:** Use to copy the selected node to the clipboard.

- **Paste:** Use to paste the selected node from the clipboard.

- **Delete:** Use to delete the node.

- Right pane: Use this pane to configure the properties of the nodes that are part of the campaign strategy.

- Lower pane: Displays the most recent generated log, warning, and error messages.

You can click the log, warning, and error messages to navigate to the node for which the messages are generated.

 Note:

When you are creating a campaign strategy and you click any node in the campaign strategy editor, and you get no response, click the parent node first, and then click the specified node again.

Campaign Strategies page field descriptions

This page lets you manage the campaign strategies.

Field or Button	Description
Text box	Use to search a campaign strategy by its name.
Click Advanced to perform advanced search. The following fields are displayed when you click Advanced .	
Drop-down list	Click the following search criterion: • Name
Drop-down list	Click the operator you want to use with the search criterion. You can use any of the following operators: • Equal to (=) • Not Equal to (!=) • in • like • not like
Text box	Type the text based on which you want to search the campaign strategies.
 Search	Click to start the search.
 Clear search	Click to clear the search.
Quick	Click to return from advanced search.
Show	Type the number of records to be displayed per page.
Page	Displays the current page number out of the total pages.
 First Page	Click to go to the first page.
Previous 	Click to go to the previous page.
Text box	Type a particular page to navigate.
Go	Click to navigate to the specified page number.

Table continues...

Field or Button	Description
Next 	Click to go to the next page.
Last Page 	Click to go to the last page.

Field or Button	Description
Name	Displays the names of the existing campaign strategies.
State	Displays the state of the campaign strategy. A campaign strategy can be in a Draft or Completed state. A Draft state indicates that the campaign strategy configuration is not complete. A campaign strategy in Draft state cannot be used in any campaign. A Completed state indicates that the campaign strategy configuration is complete and can be used in campaigns.
Task Types	Displays the following: • Agent : Indicates that the strategy includes an agent. • Voice : Indicates that the strategy includes a Call action node. • Mail : Indicates that the strategy includes a Mail action node. • SMS : Indicates that the strategy includes an SMS action node. • Custom : Indicates that the strategy includes a Custom action node.
Action	You can use the following options: • Save Campaign Strategy as : To create a copy of the campaign strategy or save the campaign strategy as a template. • Campaign Strategy Overview : To view the campaign strategy summary. You can view the summary of only those campaign strategies that are in a Completed state. • Export : To export the campaign strategy. • Delete : To delete the campaign strategy.
Add	Click to create a new campaign strategy. For more information, see Creating a campaign strategy on page 209.

Table continues...

Field or Button	Description
Import	Click to import a campaign strategy in your POM server. You can only import a campaign strategy .xml file that is exported from a POM environment. You cannot import a file after making changes to it. After importing the file, save the strategy in a draft state. Save the strategy after making the necessary changes.
Import Strategy The Import Strategy area is displayed after you click Import .	
New name	Type a new name for the file. If you do not specify a name, POM saves the strategy with the name of the file which you are importing. If a strategy with the same name already exists, POM displays an error message.
File to upload	Specify the path of the file. Click Choose File to navigate to the file.
Import	Click to import the campaign strategy.

Saving a campaign strategy as draft

About this task

When creating a campaign strategy, you can save the strategy as draft if the strategy is incomplete or contains errors that you want to resolve later. For more information, see [Creating a campaign strategy](#) on page 209.

You can also save a campaign strategy which is in a Completed or Template state as draft strategy. However, you can save a completed campaign strategy as draft only if it is not used in any campaign.

You cannot use a draft strategy in a campaign.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Strategies**.
3. On the Campaign Strategies page, in **Name**, click the completed campaign strategy or campaign strategy template you want to save as draft.
4. On the Campaign Strategy Editor page, click **SAVE DRAFT**.

Next steps

To save the draft strategy as completed, on the Campaign Strategy Editor page, perform the necessary changes and click **SAVE**.

Creating a copy or template from an existing campaign strategy

About this task

You can create a copy of an existing campaign strategy. You can also create a template from an existing campaign strategy.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Strategies**.
3. On the Campaign Strategies page, click **Save Campaign Strategy as**  corresponding to the campaign.
4. On the Save Campaign Strategy as page, in the **New Name** field, type a new name for the strategy.
5. Do one of the following:
 - Click **Save** to create a copy of the existing strategy.
 - Click **Save as Template** to create a template from the existing strategy.

The template is available in the **Template** field on the Campaign Strategies page.

Save Campaign Strategy as page field descriptions

Field or Button	Description
Name	Displays the name of the existing campaign strategy.
New Name	Type a new name with which you want to create a copy or template from the existing campaign.
Save	Click to create a copy of the existing campaign strategy.
Save As Template	Click to create a template from the existing campaign strategy.

Editing a campaign strategy

About this task

If you edit a campaign strategy that is being used by a running job, the changes are applied only when the running job is paused and resumed, or a new job is run.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Strategies**.
3. On the Campaign Strategies page, in **Name**, click the campaign strategy you want to edit.
4. On the Campaign Strategy Editor page, modify the campaign strategy as required.
5. Click **Save**.

Viewing the summary of a campaign strategy

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.

2. On the **Campaigns** menu, click **Campaign Strategies**.
3. On the Campaign Strategies page, click **Campaign Strategy Overview**  corresponding to the campaign strategy.

Result

The campaign strategy summary is displayed on the Strategy Name: <strategy name> page.

Exporting a campaign strategy

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Strategies**.
3. On the Campaign Strategies page, click **Export**  corresponding to the campaign strategy you want to export.

Result

The campaign strategy is exported to your computer in an .xml file.

You can view the exported file in an editor or import it in a POM system.

Importing campaign strategy

About this task

You can only import a campaign strategy .xml file that is exported from a POM environment. You cannot import a file after making changes to it.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Strategies**.
3. On the Campaign Strategies page, click **Import**.
4. In the **Import Strategy** area, in the **New name** field, type a new name for the file.

If you do not specify a name, POM saves the strategy with the name of the file which you are importing. If a strategy with the same name already exists, POM displays an error message.
5. In **File to upload**, click **Choose File** to navigate to the file and specify the path.

Next steps

After importing the file, save the strategy in a draft state. Save the strategy after making the necessary changes.

Deleting a campaign strategy

About this task

To delete a campaign strategy that is associated with a campaign, you must first remove the campaign strategy association from the campaign, and then delete the campaign strategy.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Strategies**.
3. On the Campaign Strategies page, click **Delete**  corresponding to the campaign strategy you want to delete.
4. On the confirmation message, click **Yes**.

Campaign strategy nodes

Notification Text

Notification text is one of the two top level nodes. Use this node to define the notification text to play, or send in an email message, or an SMS by the Avaya Notify or Avaya Agent applications. Notification text has one child node: [Text Item](#) on page 235. You can add more than one Text Item under the Notification Text node, when to send different notifications for different languages. You can choose the language from the language drop down. Notification Text is mandatory for all nodes except if you use application as URL or Custom under the Call node.

For example, when the completion code is Answer Human, play one Notification Text and when the completion code is Answer Machine, play another Notification Text.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Use this as a display name in the campaign strategy editor. If you do not specify a name, then the default name is Notification Text.
Description	You can specify a description for the notification text.
ID	A unique ID, either a numeric value or a string. The Avaya Notify, Avaya Agent, and Custom applications use this ID.

Table continues...

Property Name	Description
Default Language	Select the default language for this notification text from the drop down list. The drop down lists all languages used for the text items under the notification text node. The notification is sent in default language either when the contact does not have any preferred language or when there is no matching Text Item for the contact's preferred language.  Note: To use Chinese language to set up a notification text, you must choose the correct language depending on the type of the campaign you are running. For example, to run a call-based campaign, you must select the Chinese spoken language as either Chinese (Cantonese), or Chinese (Mandarin). To run an SMS-based or email-based campaign, you must select the Chinese written language as either Chinese (Simplified) or Chinese (Traditional). If you select a wrong value, the campaign does not run.
Edit Description	Use to edit the description of the node.

Handler

A Handler can contain one task node such as Call, SMS, Mail, Custom, or Selector.

A state is associated with each handler. There are three system defined states: initial, wait, and done. The campaign strategy is executed for each contact record filtered in the campaign. The execution starts at the Handler node with initial state. You can have only one Handler node with state as initial. The handler for initial state is mandatory.

You can add custom handlers and move the records from initial state to other state by using NextState property of Result or ResultProcessor nodes or through the FailState property of the Retry node.

States can have any value except wait or done.

For example, for Call Busy result, you have added a Retry node and given three retry attempts after 10 minutes. If after three attempts the phone is still busy, you can move the contact to another state, such as sendmail. You can add a Mail task node to send a mail to the contact.

 Note:

The state names are case-sensitive.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Type a display name for the handler node. If you do not specify a name, the default name is Handler.
Description	Specify a description for the handler node.

Table continues...

Property Name	Description
State	State can have any name except, done and wait. When the campaign job starts, all records are in an initial state. When the processing is over, the records move to done state. When a record reaches the done state, it moves out of the campaign. You have to name one of your handlers as initial. You cannot add a handler for wait and done state. If a contact record is in wait state, it remains in that state until some call disposition moves the record to the next state.
Edit Description	Click to edit the description of the handler node.

Example

Use Case: Try a voice call to a contact. If the call disposition is Busy, send an email to that contact.

Strategy Design:

1. Add two handlers. Set the State of the first handler as **initial** and the State of the second handler as **sendmail**.
2. Add a Call node under the first handler. Add a Result node under Result Processor.
3. Select the result as Call Busy and the Next State as **sendmail**.
4. Add a Mail node under second handler.

Call

Use the Call action node to make outbound calls. Call node has the following child nodes: [Restrictions](#) on page 239, [Address](#) on page 229, [Sender's Address](#) on page 247, and [Result Processors](#) on page 230.

Address and ResultProcessors are mandatory nodes.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Type a display name for the call node. If you do not specify a name, the default name is Call.
Description	Type a description for the call node.
Sender's display name	Use this to set the display for the name of the caller which is either the phone number or the SIP address.

Table continues...

Sender's Address	Use this property to define custom sender's address displayed to the called party. You can define a generic sender's address in this property for all calls for the task. To customize it based on specific contact attribute, you can add a Sender's Address node. Sender's Address to be used depends on the protocols used for dialing a contact. • If you configure POM to use H.323 for dialing customer contact, POM does not use Sender's Address defined in the strategy. Instead, Communication Manager has the control of setting Sender's Address/ANI/Caller ID for outgoing calls. • If you configure POM to use SIP for dialing customer contact, POM uses Sender's Address defined in the strategy for setting Sender's Address/ANI/Caller ID.
Timeout (sec)	Timeout (sec) defines the time to wait for the contact to pick up the call before changing the call disposition to Ring No Answer. The default value is 45 seconds. The minimum value is 15 seconds.
Restrict On No Suitable Address	If you set this property to Yes and if POM cannot attempt a record because of guard time restrictions, or minimum and maximum contact time restrictions, POM marks the record as temporary restricted. POM queues the record to the predefined POM queue for a retry. Set this property to No if you want POM to mark the records that cannot be attempted because of guard time restrictions, or minimum and maximum contact time restrictions as completed. POM assigns the Sys_No_Callable_Address completion code to such records. The default value is Yes.
Guard Times	Set Guard Times to Enabled if you want POM to place calls according to the guard time configured for the time zone of the phone numbers. For example, you want to restrict POM from placing calls before 8:00 A.M. and after 9:00 P.M. in the time zone defined for the phone numbers. You can configure the guard time by using the Configurations > Country Specific Phone Settings option.
Skipover To Next Phone	This property is available only if you enable the Guard Times property. Enable this property to skip to the next Address node in the handler if the phone number in the current Address node cannot be attempted because of guard time restrictions. This feature is also applicable to the Address nodes that are configured under a Retry node.

Table continues...

Min Contact Time	MinContactTime sets the time before which calls are not allowed. So from 00:00:00 to Min Contact Time, you cannot make any calls. You can make the calls from Min Contact Time to either Max Contact Time, if set, or till 23:59:59. POM evaluates the Min Contact Time based on the time zone of the phone.  Note: If the Min Contact Time is greater than the Max Contact Time, the condition is reverse. That is, you can make calls from Max Contact Time till 23:59 from the earlier day, and from 00:00 to Min Contact Time, the next day. For example, Min Contact Time is 23:00 and Max Contact Time is 05:00. Then, you can make calls from 23:00 to 23:59 on the earlier day and from 00:00 to 05:00 on the next day. Date and Time based comparisons use the date and the time format specified in Global Date Format field. Min Contact Time must not be equal to Max Contact Time.
Max Contact Time	Max Contact Time sets the time up to which calls are allowed. So from Max Contact Time to 23:59:59, you cannot make any calls. You can make calls, either from 00:00:00 or Min Contact Time, if set, till Max Contact Time. For example, if you are running a campaign and you do not want to make calls after 8:00 P.M., you can set the Max Contact Time to 20:00:00. POM evaluates the Max Contact Time based on the time zone of the phone.
Re-check Interval (min)	Use this to specify a time interval after which when a contact attempt is restricted because it matched some restriction of type Temporary. It will be again checked for all the restrictions defined in that handler. If no value is specified for this parameter then it will be considered as 1 minute.
On Media Server Failure	On Media Server Failure has two values, retry or no_retry. The default is retry. When set to retry and POM detects Voice Server failure, that contact is retried until the server starts responding again. If you set the value to no_retry, then the system marks the call attempt result as Media_Server_Failure, and you can handle this disposition in the Result node. If you do not handle the disposition, the system moves the contact to the done state and removes it from the running job. For more information about On Media Server Failure, see <i>Avaya Experience Portal</i> documentation.
Priority	You can decide the priority of the task by specifying a number between 1 to 10. The higher the number, the higher the priority of the task. For example, a task with priority assigned as 7 gets more ports as compared to the task with priority 3.  Note: In POM 2.0, you can specify the priority at the campaign level. Whereas, from POM 3.0.3 onwards, you can specify the priority at the task level in the campaign strategy. If you are upgrading POM, and you save the campaign strategy without selecting or changing the priority of a task, POM applies the priority that you have mentioned in POM 2.0 for all tasks in the strategy.

Table continues...

Allocation Type	Click the allocation type of the ports for the Call task node. The following are the options: • Reserved: The ports are reserved for the Call task node. • Dynamic: The ports are shared with other nodes in currently active campaigns. The default value is Dynamic. For more information about dynamic and reserved licensing, see <i>Proactive Outreach Manager Overview and Specification</i>.
Dialogflow Welcome Event	Use this event name for Google Dialogflow welcome intent. Driver application passes this event name to Orchestration Designer application and then Orchestration Designer application can use this event name to initiate the intended Google Dialogflow.
CCA parameters	
Enhanced CCA	If Enhanced CCA is ON, POM further classifies a call after it receives a Call Answer or Call Connect disposition. On Call Answer or Call Connect, if POM does not receive a start of a greeting message from the remote end within two seconds or within the time configured on the Campaign Creation page in POM, the application assigned for live voice or Answer Human starts. If POM receives an indication of a start of a greeting message, it waits for two seconds for the final call analysis result before starting the application. If it does not receive the result within two seconds, the application assigned for live voice or Answer Human starts. If it receives the result after the application starts, POM changes the application and assigns the completion code as appropriate. If Enhanced CCA is OFF, POM does not classify a call after Call Connect or Call Answer. POM starts the application when it receives a connect and assigns the Call Answered completion code to the call.
Background AMD	You can specify the call classification that is done on the customer call after being patched with the Agent. Background AMD is applicable only when the Enhanced CCA option is set to ON and the Call pacing type is Cruise Control, Expert Call Ratio, or Progressive. Background AMD is set to of OFF by default. If Background AMD is set to ON, you must select one of the following values from Action on AMD: • Disconnect the call • Leave a Voice Mail • Continue with Agent

Table continues...

Action on AMD	Use Action on AMD to specify what action POM must take if the call is classified as Answer Machine when Background AMD is ON. If the Action on AMD is set to Disconnect the call, then the Result node for Answer Machine allows only Retry operation. Retry is an optional operation. If the Action on AMD is set to Leave a Voice Mail, then the Result node for Answer Machine allows only Application operation so that the system can leave a message for the customer. If the Action on AMD is set to Continue with Agent, then the Result node for Answer Machine allows only Agent operation so that the agent can decide next action.
Silence Call Detection	After an outbound call connects, the call is answered by the customer or an answering machine, or it passes through the call classification timeouts. If a call is answered and no voice energy is detected, the Media Processing Platform (MPP) generates a Call Classification Analysis (CCA) timeout event after the configured CCA timeout. On CCA timeout, POM does the following based on the configuration of Silence Call Detection: • If Silence Call Detection is set to ON, POM classifies the call as Silence Detected and defines the call flow according to the campaign strategy. If POM detects a silence call, it performs one of the following actions based on the campaign strategy configuration: - Connects the call to the agent. - Runs an application. - Disconnects the call and attempts to connect with the same contact on another phone. • If Silence Call Detection is set to OFF, POM classifies the call as Answer Human. By default, Silence Call Detection is OFF. For more information about the prerequisites for enabling Silence Call Detection, see Configuring Silence Call Detection on page 266.
Applications	

Table continues...

Driver Application	Use to specify a CCXML application for making outbound calls. DriverApp defines the CCXML application that you can use for the outbound calls. This field lists all applications defined as POM:Driver in the Experience Portal application configuration. The selected application must have all resources (TTS, ASR) required by the applications invoked from this strategy. For POM, two new application types are added in Avaya Experience Portal: • POM:Driver: POM:Driver has to be a CCXML application used to launch calls and allocate the Automated Speech Recognition (ASR), and the Text to Speech (TTS) resources. • POM:Application: The POM:Application type is a type of custom application. You can run this application through a campaign strategy. These applications get the ASR/TTS resources from POM:Driver application.
Nailer Application	This is applicable only for agent-based campaigns. You can specify a CCXML application which takes care of establishing contact with an available agent, also called as nailing the agent.
Nuisance Call Application	Use to specify the Avaya Orchestration Designer application that is played to the customer if POM marks the call as nuisance call. You can configure the Nuisance Call Application as an Avaya Orchestration Designer VXML application that is configured as type POM:Application from System Configuration > Applications.
On Hold Application	Use to specify the Avaya Orchestration Designer application that is played to the customer if an agent places the customer call on hold or transfers the call. You can configure the On Hold Application as an Avaya Orchestration Designer VXML application that is configured as type POM:Application from System Configuration > Applications.
Pacing Parameters	
The properties differ depending on the pacing type you choose.	
Call Pacing Type	Use to specify the pacing type for the given task.
Min. Ports	Use to specify the minimum number of POM ports for the given task. For more information, see Licensing page field descriptions on page 66.
Max. Ports	Use to specify the maximum number of POM ports for the given task.
If you select the Call Pacing Type as Cruise Control, the following additional properties are available:	
Runtime Change Pacing Type	Click ON to provide the Runtime Pacing feature for the Call task node in the Supervisor Dashboard. A Supervisor Dashboard user can use the Runtime Pacing feature to change the pacing type of the Call task node at run time. Click OFF if you do not want to provide the Runtime Pacing feature for the Call task node in the Supervisor Dashboard. For more information, see Allowing to change the pacing type of a Call task node in real time on page 267.
Desired Service Levels	Use this to specify a service level against which the POM system compares the realized service levels to determine the magnitude and direction of service level errors. You can specify any value between 70 and 99.

Table continues...

Min Agents	Use to specify the minimum number of agents required for a task. You can specify any number between 0 and 9999.
Max Agents	Use to specify the maximum number of agents required for a task. You can specify any number between 1 and 9999.
Agent Outbound Skills	Use to specify the agent with the required outbound skills so POM can assign the call. If POM is installed in Oceana mode, when you click Agent outbound skill , the system displays a dynamic window Oceana Skills with a list of the attributes. You can select one or more attributes from the list. This list is fetched from Avaya Oceana®.
ACW Time (Sec)	Use to specify the amount of time, the agent gets after the call, to wrap up the call with notes or other with other related work.
# of ACW extensions	Use to specify the number of After Call Work (ACW) extensions required for an agent.
Default completion code	Specify the completion code to be assigned to the call if the agent does not provide the completion code before the ACW timeout is reached.
If you select the Call Pacing Type as Expert Call Ratio, the following additional properties are available:	
Runtime Change Pacing Type	Click ON to provide the Runtime Pacing feature for the Call task node in the Supervisor Dashboard. A Supervisor Dashboard user can use the Runtime Pacing feature to change the pacing type of the Call task node at run time. Click OFF if you do not want to provide the Runtime Pacing feature for the Call task node in the Supervisor Dashboard. For more information, see Allowing to change the pacing type of a Call task node in real time on page 267.
Expert Call Ratio Type	Use to specify the ratio type as Agent Work Time or Agent Update Time. For Agent Work Time, the POM system considers the number of agents in busy state to calculate the pace and adjusts the calling pace accordingly. For Agent Update Time, the POM system considers the number of agents in wrap up state to calculate the pace and adjusts the calling pace accordingly. The number of agents to consider is derived from the Value (%) field.
Value (%)	For Agent Work Time, enter a percent value from 0 through 100. The recommended setting is from 29 through 71. For Agent Update Time, enter a percent value from 0 through 100. The recommended setting is from 32 through 78. You can specify a higher value if you want to increase the speed of dialing.
Initial Hit Rate (%)	The initial hit rate, a number, determines the average number of calls per agent that the POM system makes during the first 5 minutes of the campaign job. The initial hit rate is the number of call completions compared with call attempts. If you set the rate too low, at 20 to 30, the dialer can make more connects than your agents can handle during the initial dialing period. If you set the rate too high, over 70, the POM system can fail to make enough connections to keep your agents busy.

Table continues...

Minimum Hit Rate (%)	The minimum hit rate, a number, determines the maximum number of calls to place to make an agent connection. The minimum and the maximum values are 1 and 100 respectively in the increments of 10. The default value is 30.
Min Agents	Use to specify the minimum number of agents required for a task. You can specify any number between 0 and 9999.
Max Agents	Use to specify the maximum number of agents required for a task. You can specify any number between 1 and 9999.
Agent Outbound Skills	Use to specify the agent with the required outbound skills so POM can assign the call. If POM is installed in Oceana mode, when you click Agent outbound skill , the system displays a dynamic window Oceana Skills with a list of the attributes. You can select one or more attributes from the list. This list is fetched from Avaya Oceana®.
ACW Time (Sec)	Use to specify the amount of time, the agent gets after the call, to wrap up the call with notes or other with other related work.
# of ACW extensions	Use to specify the number of After Call Work (ACW) extensions required for an agent.
Default completion code	Specify the completion code to be assigned to the call if the agent does not provide the completion code before the ACW timeout is reached.
If you select the Call Pacing Type as Preview, the following additional properties are available:	
Runtime Change Pacing Type	Click ON to provide the Runtime Pacing feature for the Call task node in the Supervisor Dashboard. A Supervisor Dashboard user can use the Runtime Pacing feature to change the pacing type of the Call task node at run time. Click OFF if you do not want to provide the Runtime Pacing feature for the Call task node in the Supervisor Dashboard. For more information, see Allowing to change the pacing type of a Call task node in real time on page 267.
Timed Preview	Use to enable or disable the timed preview. If you enable the timed preview, the agent sees the preview of a contact for a specified time period. Select Yes to enable the time-based pacing preview.
Preview Time (Sec)	Use to specify the time duration in seconds for which the agent is given the preview of a contact.  Note: Because of network latency and other communication-related factors, the POM Agent Activity Detail Report might display a few additional seconds than the value you configure in the Preview Time (Sec) field. In the POM Agent Activity Detail Report, you can calculate the time an agent was in preview state from the difference in time recorded in Start Time and End time fields.
Can Cancel Preview	Use to specify if the agent can cancel the preview. If you set the value to Enabled, the agent can cancel the preview.
Min Agents	Use to specify the minimum number of agents required for a task. You can specify any number between 0 and 9999.

Table continues...

Max Agents	Use to specify the maximum number of agents required for a task. You can specify any number between 1 and 9999.
Agent Outbound Skills	Use to specify the agent with the required outbound skills so POM can assign the Campaign. If POM is installed in Oceana mode, when you click Agent outbound skill , the system displays a dynamic window Oceana Skills with a list of the attributes. You can select one or more attributes from the list. This list is fetched from Avaya Oceana®. In case of multiple attribute, only the agent with all matching attributes is attached to the campaign.
ACW Time (Sec)	Use to specify the amount of time the agent gets after the call, to wrap up the call with notes or other with other related work.
# of ACW extensions	Use to specify the number of After Call Work (ACW) extensions required for an agent.
Default completion code	Specify the completion code to be assigned to the call if the agent does not provide the completion code before the ACW timeout is reached.
If you select the Call Pacing Type as Progressive, the following additional properties are available:	
Runtime Change Pacing Type	Click ON to provide the Runtime Pacing feature for the Call task node in the Supervisor Dashboard. A Supervisor Dashboard user can use the Runtime Pacing feature to change the pacing type of the Call task node at run time. Click OFF if you do not want to provide the Runtime Pacing feature for the Call task node in the Supervisor Dashboard. For more information, see Allowing to change the pacing type of a Call task node in real time on page 267.
Over Dial Ratio	Use to specify the dialing ratio with respect to the number of available agents. For example if you set the over dial ratio as 1, POM dials 1 call for 1 agent. You can also specify a float value like 1.2. If you specify the over dial ratio as 1.2, then POM dials 12 calls for 10 agents. The higher the over dial ratio, the chances of nuisance calls are also increased depending on the hit rate. You can specify any number between 1.0 and 100.
Min Agents	Use to specify the minimum number of agents required for a task. You can specify any number between 0 and 9999.
Max Agents	Use to specify the maximum number of agents required for a task. You can specify any number between 1 and 9999.
Agent Outbound Skills	Use to specify the agent with the required outbound skills so POM can assign the call. If POM is installed in Oceana mode, when you click Agent outbound skill , the system displays a dynamic window Oceana Skills with a list of the attributes. You can select one or more attributes from the list. This list is fetched from Avaya Oceana®.
ACW Time (Sec)	Use to specify the amount of time, the agent gets after the call, to wrap up the call with notes or other with other related work.
# of ACW extensions	Use to specify the number of After Call Work (ACW) extensions required for an agent.
Default completion code	Specify the completion code to be assigned to the call if the agent does not provide the completion code before the ACW timeout is reached.

Table continues...

If you select the Call Pacing Type as <i>Time Based</i> , the following additional properties are available:	
Call Pace	Specify a value between 1 to 1000000. This is rate of calls. For example if this value is 10 and unit is minute, POM tries to make 10 call attempts in 1 minute.
Call Pace Time Unit	Select the unit for the rate specified with Call Pace . The available values are 'Second', 'Minute' and 'Hour'.
If you select the Call Pacing Type as <i>Skill Based</i> , the following additional properties are available:	
 Note: The <i>Skill Based</i> call pacing type is not visible if you have installed POM in Oceana mode.	
Skill	Use to select the inbound skill to monitor for the pacing of this task. If you disable the skill for pacing, while the skill-based campaign is running, the changes do not take effect immediately on the running campaign. You must stop the skill-based campaign manually and change the skill being monitored from the campaign strategy.
Parameter	Select the parameter to monitor for the pacing algorithm.
EWTLevel	You can edit this property only when you select value Expected Wait Time in the Parameter property. You can select either High , Med , Low , or a combination of these values. When you click SHOW SOURCE button to view the XML file, the “ewtLevels” key value pair with selected levels is displayed on the screen.
Desired Value	Depending on the parameter selected, specify appropriate values. For Expected Wait Time, specify a valid integer value between 1 to 7200. For Service Level, specify a valid integer value between 1 to 100. For Avg Speed of Answer, specify a valid integer value between 1 to 100. For Queue Length, specify a valid integer value between 1 to 1000.
Initial Pace	Use to specify the initial value of the number of call attempts in the pacing interval.
Pace Interval	Use to specify the time unit for the call pacing. You can specify Hour, Minute, or Second.
Pacing Variation (%)	Use to specify the pacing variation percentage. POM uses this value as a step to vary the pace depending upon the parameter value.
Max Pace Value	Use to specify the maximum pacing value for the task. You can specify a value between 1 to 500000. POM never exceeds this pace.
If you select the Call Pacing Type as <i>Manual</i> , the following additional properties are available:	
 Note: The On Media Server Failure field is set to <code>no_entry</code> by default. All the CCA parameters, Driver Application, Nailer Application, Nuisance Application, and OnHold Application are disabled by default.	
Timed Preview	Use to enable or disable the timed preview. If you enable the timed preview, the agent sees the preview of a contact for a specified time period. Select Yes to enable the time-based pacing preview.
Preview Time (Sec)	Use to specify the time duration in seconds for which the agent is given the preview of a contact.

Table continues...

Can Cancel Preview	Use to specify if the agent can cancel the preview. If you set the value to Enabled, the agent can cancel the preview.
Min Agents	Use to specify the minimum number of agents required for a task. You can specify any number between 0 and 9999.
Max Agents	Use to specify the maximum number of agents required for a task. You can specify any number between 1 and 9999.
Agent Outbound Skills	Use to specify the agent with the required outbound skills so POM can assign the Campaign. If POM is installed in Oceana mode, when you click Agent outbound skill , the system displays a dynamic window Oceana Skills with a list of the attributes. You can select one or more attributes from the list. This list is fetched from Avaya Oceana®. In case of multiple attribute, only the agent with all matching attributes is attached to the campaign.
ACW Time (Sec)	Use to specify the amount of time the agent gets after the call, to wrap up the call with notes or other with other related work.
# of ACW extensions	Use to specify the number of After Call Work (ACW) extensions required for an agent.
Default completion code	Specify the completion code to be assigned to the call if the agent does not provide the completion code before the ACW timeout is reached.

Address

Use the Address node to define the contact attribute to make a call, send an SMS, take a custom action, or send an email message.

You can use multiple address nodes inside a task. POM selects the first matching address based on Min Contact Time and Max Contact Time for a contact when a campaign is run. The current time in a contact's current address time zone is used for all time comparisons.

If you enabled the **Skip Empty Address** option on the Global Configurations page, then it skips the address which is empty and moves on to the next address.

For Call and SMS action, you can set one of the phone number attributes. For mail action, you can set one of the email attributes.

Address node is a mandatory node, and has no child nodes.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Type a display name for the Address node. If you do not specify a name, the default name is Address.
Description	Type a description for the Address node.

Table continues...

Property Name	Description
Min Contact Time	Min Contact Time defines the earliest time when the contact must be contacted using this address. Hence, from 00:00 to Min Contact Time, this address is not used. This address is used from Min Contact Time to either Max Contact Time, if set, or till 23:59.  Note: If the Min Contact Time is greater than the Max Contact Time, the condition is reverse. That is, you can make calls from Max Contact Time till 23:59 from the earlier day, and from 00:00 to Min Contact Time, the next day. For example, if Min Contact Time is 23:00 and Max Contact Time is 05:00, then you can make calls from 23:00 to 23:59 on the earlier day and from 00:00 to 05:00 on the next day. Date and Time based comparisons use the date and time format specified in Global Date Format field. Min Contact Time must not be equal to Max Contact Time.
Max Contact Time	Max Contact Time defines the time till when the contact can be contacted using this address. Hence, from Max Contact Time to 23:59, this address is not used. This address is used, either from 00:00 or Min Contact Time, if set, till Max Contact Time. For example, if you are running a campaign and you do not want to contact the contact after 8 P.M., you can set the Max Contact Time to 20:00:00.
Weekdays Only	The Weekdays Only property is of Boolean type. If set to true, the address is used only on weekdays. If set to false, the address is used on all days. This property uses the weekend days set in the global configuration. The default value is false.
Contact Attribute	Contact Attribute is a mandatory property. All predefined and custom attributes of type phone or email are listed in the drop-down list depending on the parent node type. Select the phone number attribute you want to use to make a call or send an SMS message. Select the email address you want to use to send an email message.
Edit Description	Click to edit the description of the address node.

Result Processors

Result Processors is a container node for Result nodes.

Within Result Processors, you can add multiple Result nodes to handle different dispositions or contact attempt results. Result Processors have only one child node, that is, [Result](#) on page 232.

If the **Runtime Change Pacing Type** property is set to ON in the Call task node, you can also add Result nodes relevant to the new pacing type a user can potentially specify in real time for the Call task node.

For more information about changing the pacing type of a Call task node in real time, see [Allowing to change the pacing type of a Call task node in real time](#) on page 267.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Type a display name for the Result Processors node. If you do not specify a name, the default name is Result Processors.
Description	Type a description for the Result Processors node.
Next State	Next State has the default value as done. If a particular result is not handled by adding a result node, the Next State value from the Result Processors node is used as the Next State for that result. By default it has three values: initial, done and wait. As you add new handlers in the campaign strategy, those states are available in the Next State drop-down list.

Table continues...

Property Name	Description
Custom Processor	Use to select the custom processor class that POM invokes for each completion code. You can have: • Publish: If you select this option, POM publishes all results to an ActiveMQ server <code>pom.attempt.result.topic</code>. You can write a client program to subscribe to this topic to read the results from the JMS topic. You can have multiple clients reading results from the topic. POM provides a sample client which you can use as a reference. This sample client reads the results and writes them to a file in the Export folder. You can run the sample client using <code>\$POM_HOME/bin/testResProcClient.sh</code>. For more information about the sample client, see <i>Developer Guide for Proactive Outreach Manager</i>. POM publishes every result as an object of type <code>PomResultInfo</code>, comprising of: <i>String</i> campaignName, <i>int</i> jobId, <i>long</i> pimSessionID, <i>String</i> contactID, <i>int</i> contactGroupID, <i>String</i> contactGroupName, <i>String</i> address, <i>String</i> result, <i>String</i> zoneName For more information, see <i>Application notes</i> on Avaya Support site at: http://support.avaya.com • Custom: If you select this option, you can specify a Java class for processing custom results. This Java class must implement the <code>PomCustomResultProcessor</code> interface. POM initiates this class and invokes when a result is available. The result data is passed as part of <code>PomResultInfo</code> parameter. • None (Default) POM ActiveMQ documentation addition for <code>producer.setTimeToLive()</code> & activeMQ logging enablement. Scenario 1: A client (subscriber) can receive a real-time event from ActiveMQ in a delayed manner due to network latency. In such cases, the client gets the event but discards if the timestamp of the published event is 6 secs or more than the event received timestamp by the subscriber (client). Scenario 2: Client (subscriber) machine is not time-synchronized with POM Server via an NTP Server. The time difference is “variable” and not consistent. On some customer environments, it was seen that due to this, the behavioral pattern varied. At times when the time difference was less than 6 secs, the subscriber received the event but did not discard it, and the client application registered the entry of the event. Whereas at times when the time difference was 6 or more seconds, the client discarded the event as the time to live set by the producer had expired.
Result Processor Custom Class	Specify the custom class.
Edit Description	Click to edit the description of the Result Processors node.

Result

Use the Result node to handle different dispositions or call attempt results.

For the action you want to take such as use another channel to contact, retry the channel, or move out the contact from the campaign after you obtain the result, use the Result node.

Based on the value in the **Value** property and the call pacing type you select, the child nodes for Result node change.

However, if the **Runtime Change Pacing Type** property is set to ON in the parent Call task node, the **Value** property displays all completion codes. You can then configure Result nodes relevant to the new pacing type a user can potentially specify in real time for the Call task node.

For more information about changing the pacing type of a Call task node in real time, see [Allowing to change the pacing type of a Call task node in real time](#) on page 267.

For all other values, you can use the Application or Retry node. If you use the Application node, you can also use the Custom action.

At the time of result processing, if the contact has a callback set, then while processing the result, only the custom class is invoked, if specified. The rest of the result processing for that contact is skipped till the callback is attempted. So, callbacks take precedence over retries.

 Note:

If any completion code needs agent treatment in a campaign strategy, set the **Next State** to `wait` so that the contact is not marked as `done`.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Use this as a display name in the campaign strategy editor. If you do not specify a name, then the default name is Result.
Description	Use to specify the description for the Result node.
Value	Select the result (completion code) to take action on. Based on the received result, you can decide whether to keep the contact in the campaign, or move the contact to done state and move the contact out of the job. The completion codes that are available in this field depend on the pacing type of the parent Call task node. If you set the Runtime Change Pacing Type property to ON in the parent Call task node, this field displays all completion codes.
Next State	By default there are 3 values in the drop- down list; initial, wait and done. As you add new handlers in the campaign strategy, those states are available in the NextState drop-down list.

Table continues...

Property Name	Description
Next State After (sec)	Use this value to specify time value in seconds. After the value specified is reached, the state of the contact is set to the value mentioned in the Next State. This is useful if you want to wait for another result before taking further action on this result. Ensure that the value of the Next State After property in the campaign strategy is greater than or equal to the value of the time specified in the CCA timer configuration. For jobs with more than 1 handlers in campaign strategy, ensure that the value of the wait time is greater than or equal to the value of the CCA timeout configured in the job when the Next State property is set to a different handler. This is applicable for the following jobs: • Notification or agent less jobs. • Agent based jobs in which the <code>Enh CCA</code> and <code>Back ground AMD</code> properties are enabled.
Edit Description	Use to edit the description of the Result node.

Related links

[Call Result Custom node](#) on page 234

[Custom result node under Application node of SMS, Email, and Custom](#) on page 235

Call Result Custom node

A **Custom** node can be used in **Result** node of a **Call** action. When you use the **Custom** node in the **Result** node of a **Call** action, you must select the Orchestration Designer application to be used for that result. Orchestration Designer applications can be used only for results corresponding to successful calls.

A **Custom** node does not have any child node.

Property	Value
Name	Use this as a display name in the campaign strategy editor. If you do not specify a name, then the default name is Custom.
Description	Use to specify a description for the Custom action.
Application	Select the desired Orchestration Designer application from the drop-down. An Orchestration Designer application shows up in the list only when it is configured as POM Application in Avaya Experience Portal.
VDN	Enter a string here. This is passed as a parameter to the Orchestration Designer application.
Agent Script	Select the agent script that POM must display on the agent desktop.
The following fields are not applicable if you are running a non-agent campaign.	
Callback Parameters	
Preferred Agent Call back	This parameter is enabled by default. If you disable this parameter, then an agent cannot schedule a preferred agent callback.

Table continues...

Property	Value
Strict Agent Call back	This parameter is enabled by default. If you disable this parameter, then an agent cannot schedule a strict agent callback.
Campaign Call back	This parameter is enabled by default. If you disable this parameter, then an agent cannot schedule a callback for a campaign.
General Call back	This parameter is enabled by default. If you disable this parameter, then an agent cannot schedule a general callback.
Can Cancel Call back	This parameter is enabled by default. If you disable this parameter, then an agent cannot cancel a callback.
Edit Description	Click to edit the description of the Custom action.

Related links

[Result](#) on page 232

Custom result node under Application node of SMS, Email, and Custom

A **Custom** node can be used in **Result** node of **SMS**, **Mail**, and **Custom** action. When you use the **Custom** node, POM uses the specified Java implementation to carry out custom action or result processing.

A **Custom** node does not have any child node.

Property	Value
Name	Use this as a display name in the campaign strategy editor. If you do not specify a name, then the default name is Custom.
Description	Use to specify a description for the Custom action
Custom Class	Use to specify the custom class POM can use for a custom implementation. Custom class must be the fully qualified Java class name and this class must be available on all POM servers in the system.

Related links

[Result](#) on page 232

Text Item

Use this node to define the text to play, or send in an email message, or an SMS. This node has no child node.

* Note:

The properties marked with an asterisk (*) are mandatory.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Use this as a display name in the campaign strategy editor. If you do not specify a name, then the default name is Text Item.
Description	You can specify a description for the Text Item.

Table continues...

Property Name	Description
Language	This property defines the language for the text. You can select the language from the drop-down list. The notification is sent in the selected language.
Subject	This property is valid only for the Mail task node. Use this property to define the subject of the email message. The maximum length for the subject field is 2048 characters. You can also click Edit Subject to use contact attributes in the subject. This property is mandatory.
Text	Use this property to define the message body. Click Edit Text to open the Notification Text editor and define the message body. You can define the message body in either Rich Text or HTML format. You can also enter the contact attributes in the message. You can embed images of HTTP or file type in the message. To ensure proper formatting of the text in an email message, select the Enable HTML format check box in the Notification Text editor. Selecting the Enable HTML format check box displays a formatting toolbar in the editor. You can use this toolbar to apply basic HTML formatting to the text. If you have embedded images in the email message, the formatting might differ for different clients. The formatting of the images also depends on the server and client settings. If you clear the Enable HTML format check box, the HTML formatting that is applied to the text is removed. The toolbar provides basic HTML formatting options such as options to change the font size, apply indentation to the text, and add hyperlinks. For full HTML support, format the text by using any other HTML editor and copy the formatted text. In the Notification Text editor, clear the Enable HTML format check box and paste the formatted text.
Edit Subject	Click to edit the subject of the email message and use contact attributes in the subject.
Edit Text	Click to edit the message body. You can also use contact attributes in the message body. You can embed images of HTTP or file type in the message body.
Edit Description	Click to edit the description of the Text Item.

 Note:

If you use XML tags in a notification text node, and the notification text is used in Avaya Agent or Avaya Notify nodes under call action, the system plays an error prompt.

Example

Play Hi <firstname> message:

Click **Edit Text**. In the **Notification Text** dialog box, type `Hi`. Select the `firstName` attribute from the drop-down list, and then click **Insert**. This adds the `$firstName$` in the notification text. When you play or display the notification text, it replaces the `$firstName$`, with the first name of the recipient.

Selector

Use the selector handler to change the way the system establishes a contact with the required contact record. For example, for campaign to make a voice call between 9:00 A.M. to 5:00 P.M., and after 5:00 P.M. send an SMS to the contact. You can specify the condition using the Selector handler. To place any such condition, you must place the Selector handler as the first handler. For any other actions to perform, you can place one or more handlers such as SMS, Call, Mail, or Custom. You can also use the Selector node for 2 way SMS and 2 way email campaigns.

The Selector node has two child nodes, Conditions and Condition.

The following table lists the properties and descriptions of the node:

Property Name	Description
Name	Use this as a display name in the campaign strategy editor. If you do not specify a name, then the default name is Selector.
Description	Specify a description for the Selector node.
Default Next State	The default value of this property is done . If a particular condition is not handled by adding a Condition node, then the Default Next State value from the Selector node is used as the default next state for that condition. The options are: initial, done, and wait. As you add new handlers in the campaign strategy, those states are available in the Default Next State property.
Edit Description	Use to edit the description of the Selector node.

Conditions (under Selector node)

The Conditions node is a child node of the Selector node. You can use this node to specify more than one condition.

The following table lists the properties and description of the node.

Property Name	Description
Name	Specify a name for the Conditions node. If you do not specify a name, the default name is Conditions.
Description	You can specify a description for the Conditions node.
Select Attribute Type	Use to specify the attribute type to add conditions to. You can choose from Contact, System, or Custom attribute type.

Table continues...

Property Name	Description
Selector Attribute	Use to specify the attribute to add conditions. Depending on the attribute type you select, the values in the drop-down list change. For example, if you select System as attribute type, the drop-down displays day, date, and time. If you select Contact as the attribute type, the drop-down displays the contact attributes.
Selector Custom Class	Use to mention the custom class.
Edit Description	Use to edit the description of the Condition node.

Condition (under Selector node)

The Condition node is a child node of the Conditions node. You can use this node to specify more than one condition.

The following table lists the properties and description of the node.

Property Name	Description
Name	Type a name for the Condition node. If you do not specify a name, the default name is Condition.
Description	Type a description for the Condition node.
Operator	You can choose any operator from the following: • Equals • Not Equals • Greater Than • Less Than • Between • Starts With • Contains • Is Null • Is Not Null • One Of
Value	Specify a value for the condition.
Min Value	Specify a minimum value for the condition. For example if you are using the Between operator, you can specify a minimum value.
Max Value	Specify a maximum value for the condition. For example if you are using the Between operator, you can specify a maximum value.

Table continues...

Property Name	Description
Next State	The default value for this property is done. The Next State value is used as the next state for the condition if it is met. The options are: initial, done, and wait. As you add new handlers in the campaign strategy, those states are available in the Next State drop-down list.
Edit Description	Use to edit the description of the Condition node.

Restrictions

Restrictions node is a parent node for [Restrict](#) on page 242, [Custom Restrict](#) on page 245, and [Override](#) on page 246 nodes.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Type a display name for the Restrictions node. If you do not specify a name, the default name is Restrictions.
Description	Type a description for the Restrictions node
Edit Description	Click to edit the description.

Note:

All restrictions specified in the campaign strategy are processed from top to bottom in the order they are listed, except for the DNC, which is applied first before any other restriction. If two more restrictions match, although they have different exceptions, the system applies the last restriction.

Sample case study — Appointment reminder

Swedish clinics chose Premiere Global's Appointment Reminders application to send automated voice reminders to their patients of their upcoming appointments.

All 50 clinics in the network operate under one central appointment reservation system called MYSIS. Two business days before the scheduled appointment date, a file is exported for each clinic containing the patient name, phone number, appointment date, time, and location. The FTP submission is sent into the system which builds the job based on the profile setting and queues it up for delivery. The system then uses Text-to-Speech to deliver the message while inserting the appropriate appointment details. The message also uses Data Collection allowing the patients to press 1 to request a call to reschedule and press 2 to cancel the appointment.

Each delivery report is sent directly to the Clinic Administrator who can take appropriate action on the non-deliveries, cancels, or reschedules.

You can design the reminder in two ways:

- Use Record Selection criteria in filter template: Use to filter only those records whose appointment date is after 2 days. This is an efficient way to create the appointment reminder as the campaign runs with filtered records and hence requires less resources. Use the attribute date and name it as *appointment_date* to store the appointment date. Specify the

Filter Criteria as all records whose *appointment_date* is equal to \$TODAY+2, that is, 2 days after the current date.

- Use Restrictions in the campaign strategy: Use to restrict all contacts whose *appointment_date* is NOT EQUAL to \$NOW + 48. Use \$NOW to specify the current date and time. In this case when the system compares the date type attribute, the system compares the value with the system's current date. In this case, to apply an offset, that is, increment to \$NOW, specify the offset value in hours. To specify 2 days after the current date, the offset is 48 hours.

Property	Value
Name	
Description	
Type	permanent
Attribute Type	contact
Attribute	appointment_date
Operator	NOT EQUALS
Value	\$NOW + 48
Min Value	
Max Value	

Sample case study — Furniture delivery schedule reminder

ABC works, a furniture delivery company wants to call the customers about the furniture delivery schedule. The company provides the time value and they expect the system to call 3 hours ahead of the time value the company provides. For example, if the delivery is scheduled for 3:00 pm on Friday, May 25, 2012, then the company expects the system to call the customer at 12:00 noon, or as close to 12:00 noon as possible. The company wants to follow some time restrictions while making such calls. All calls must be made between 9 am and 6 pm. If the delivery is scheduled for 9 am, the system cannot make the call at 6 am.

As the POM system can make calls only between 9 am to 6 pm, set the **Min Contact Time** and **Max Contact Time** in the Call node of the campaign strategy.

Property	Value
Name	Call between 9am to 6pm
Description	
Sender's Display Name	
Sender's Address	
Timeout (sec)	
Min Contact Time	09:00:00
Max Contact Time	18:00:00
On Media Server Failure	retry

! Important:

Use \$NOW to specify the current date, time, or timestamp. You can use \$NOW with attributes having datatype as date, time, or timestamp. For this case study, you use time datatype. The attribute *sch_time* is of the datatype time and stores the delivery time of each record.

You can use offsets with \$NOW that is increment or decrement the value with respect to \$NOW. For example, \$NOW+3 when compared with time or timestamp data type, represents

current time + 3 hours. Similarly, \$NOW+72 when compared with current time represents current time+72 hours, but when compared with current date, represents current date+3 days. \$NOW+3.25 when compared with timestamp represents current time + 3 hours 15 minutes.

Applying restrictions for the furniture delivery schedule case study

There are 2 schedules that you handle for the furniture delivery schedule:

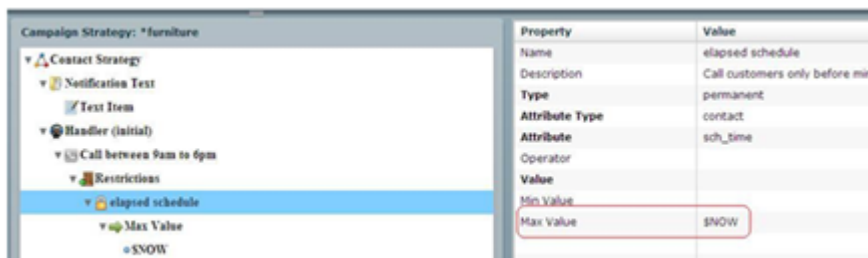
- Elapsed schedules
- Schedules which are more than 3 hours away

Assume that current time is 12:00 hours, that is, \$NOW=12:00 hours



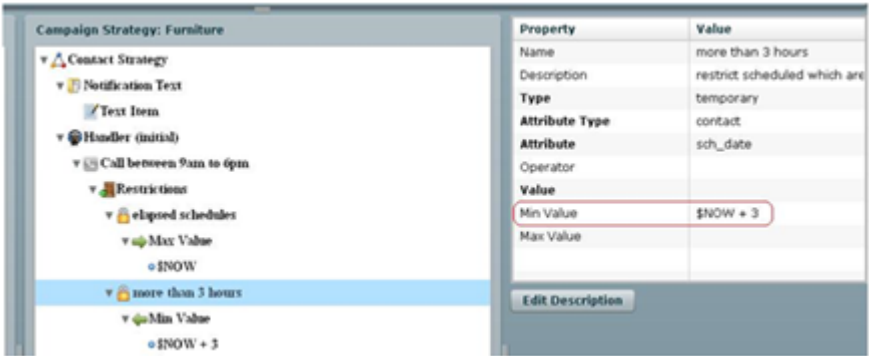
The Calling window shifts with \$NOW values, that is, if \$NOW=12:00 pm, then the system does not place a call for a delivery schedule at 4:00 pm as the calling window is only 3 hours. The system places a call to the same contact after 1:00 pm. For such contact records, you must mark the records as temporary restricted.

Restrict all schedules which are less than \$NOW or the system must not call until 12:00 hours. So the **Max Contact Time** value for the restriction area (a) is \$NOW.



For the restriction area (a), specify the **Type** as permanent. This marks the record restricted and the system does not retry this record. All the records whose delivery time is elapsed are not required to be called during the campaign.

Restrict all schedules which are greater than \$NOW+3 or the system must not call beyond 3:00 hours. So the **Min Contact Time** value for the restriction area (b) is \$NOW + 3.



For the restriction area (a), specify the **Type** as temporary. This marks the record as restricted and the system retries to check if the restriction is still valid for the records. After the restriction condition is no longer applicable for the record, POM places a call to the record.

Restrict

Use the Restrict node to apply restrictions on the contacts. You can base the restrictions on both system and contact attributes. Restrict node has one child node: [Exception](#) on page 245.

If a contact is in temporary restrict state because of the restrict condition, then the contact is not dialed. The restrict condition is rechecked after the re-check interval of the temporary restrict condition. If the customer does not specify the re-check interval of the condition, then the default value is 1 minute.

The Temporary Restricted Attempts value is a counter value which counts the number of attempts made for every contact to be dialed at that point of time.

*** Note:**

This count is not the actual attempts made for every contact, but just a check. Depending on the recheck time interval set in the Campaign Strategy, the system checks whether the restriction is applicable for every contact before the contact is dialed. If the restriction is applicable, the Temporary Restricted Attempts counter is incremented.

The Temporary Restriction Counts value is a counter value which counts the total number of contacts which are temporarily restricted.

Both the Temporary Restriction Attempts and Temporary Restriction Counts values can decrease over time. If the contact no longer matches the temporary restrict criteria and the contact is dialed, the Temporary Restriction Counts counter is reduced by 1. All Temporary Restriction Attempts made for this contact are also deducted.

For example, let us say there are 200 contacts which are temporarily restricted, and for those 200 contacts there have been 5000 rechecks done to verify if the temporary restrict is still applicable. Then the Temporary Restriction Counts will show 200 and Temporary Restriction Attempts will show 5000 at that point of time. Let us assume for 1 contact 25 rechecks have been performed so far.

If the temporary restriction is not applicable for 1 contact anymore, then the Temporary Restriction Counts value is decreased by 1 and the new value is now 199. Simultaneously the Temporary Restriction Attempts value for that contact is also reduced. So all 25 rechecks are deducted from the Temporary Restriction Attempts count. Then the new Temporary Restriction Attempts value will be 4975.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Use this as a display name in the campaign strategy editor. If you do not specify a name, then the default name is Restrict.
Description	Use to specify the description for the Restrict node.
Type	Type property decides whether to apply the restrictions permanently or temporarily. If the restrictions are of type permanent, the contact which matches the restriction condition is not attempted and gets the disposition as Restricted_Other. If the restrictions are temporary, the contact which matches the restriction condition is not attempted. The contact is validated against all the restrictions defined in that handler again after the specified recheck interval. The contact is attempted for dialing only when it does not match any of the restriction conditions. The default value is permanent.
Re-check Interval (min)	Use this to specify a time interval after which when a contact attempt is restricted because it matched some restriction of type 'temporary' it will be again checked for all the restrictions defined in that handler. The default value is permanent.
Attribute Type	Attribute Type defines if the attribute is system or contact.
Attribute	Attribute drop-down gets its value based on the value in Attribute Type property. If the Attribute Type is system, then Attribute property gets four values, day, date, time and dnc. If the Attribute Type is contact, then all contact attributes are listed in the Attribute drop-down.
Operator	You can use the operator with the attribute and its values. You can select any operator from Contains, Equals, Not Equals, Is Null, or Is Not Null. For example, if you have an attribute FirstName Not Equals "Abc", then Not Equals is an operator.  Note: Not Equals operator filters only not NULL attribute value which is different from the given value in Restrict or Exception node. To apply restrict or exception to any attribute value including NULL, which is different from the given value, use the IsNull operator in addition to Not Equals operator.
Value	Value property defines the actual value which evaluates the condition.
Min Value	If the value of the attribute is greater than the value in Min Value property, POM restricts such contacts.
Max Value	If the value of the attribute is less than the value in Max Value property, POM restricts such contacts.

Table continues...

Property Name	Description
* Note: When the Min Value is less than Max Value, all contacts in the range including Min Value and Max Value are restricted. When Min Value is greater than Max Value, all contacts in the range including Min Value and Max Value are contacted. You can specify either Operator and Value, or Min Value and Max Value.	For Value, Min Value, and Max Value properties, you can type \$NOW for any attribute of date, time, or timestamp data type. * Note: \$NOW is case-sensitive. These datatypes evaluate \$NOW. For example: • If the datatype is date type, then it evaluates \$NOW as current date. • If the datatype is time type, then it evaluates \$NOW as current time. • If the datatype is timestamp type, then it evaluates \$NOW as current date and time. For time and timestamp datatypes, only the hour part is compared. For example, if the restriction is based on time datatype, and if you mention the Min Value as \$NOW, only the hour part of time is considered for comparison. * Note: If you are using the time attribute, do not use the specific time value input. The time value input compares the exact time as hh:mm:ss. To restrict or except specific time, use the \$NOW, or a range using Min Value, and Max Value values. For example, do not specify the time value input as 16:00:00, 16:23:23. Instead specify the time value input as Min Value as 16:00:00 and Max Value as 16:59:59.
Edit Description	Use to change the description of the node.

*** Note:**

Date and Time based comparisons use the date and time format specified in **Global Date Format** field. Ensure that you specify the date and time without separators.

For example, to restrict all platinum card holders from receiving the calls permanently in a campaign, in the Restrict node, you can set the Attribute Type as contact. Select the Card_Type or some contact attribute which saves the information about the contact's credit card type. In the Value property, you can set the value as PLATINUM so that when the campaign runs, the platinum card holders are not contacted.

If the restrict type is temporary, then only the user can specify the recheck interval. If the user does not specify the value for the recheck interval, the default value is 1 minute. Before making call attempts, the restrictions are checked and the attempt is not made if the restriction condition is met.

For restrict of type temporary, if the condition is matched, the attempt is not made (restricted) and the contact is rechecked after the recheck interval.

Custom Restrict

Use the Custom Restrict node to apply restrictions using custom classes. You can base the restrictions on both predefined and custom attributes. The behavior of the custom restrict node is same as that of the restrict node, but the only difference is that you can specify a custom class to apply the restriction. The following table lists the properties and descriptions of the node:

Property Name	Description
Name	Use this as a display name in the campaign strategy editor. If you do not specify a name, then the default name is Custom Restrict.
Description	Use to specify the description for the Custom Restrict node.
Type	Type property decides whether to apply the restrictions permanently or temporarily. If the restrictions are of type permanent, the contact which matches the restriction condition is not attempted and gets the disposition as Restricted_Other. If the restrictions are temporary, the contact which matches the restriction condition is not attempted. The contacts is validated against all the restrictions defined in that handler again after the specified recheck interval. The contact is attempted for dialing only when it does not match any of the restriction conditions. The default value is permanent .
Re-check Interval	Use this to specify a time interval after which when a contact attempt is restricted because it matched some restriction of type 'temporary' it will be again checked for all the restrictions defined in that handler. If no value is specified for this parameter then it will be considered as 1 minute.
Custom class	Use to specify the custom class POM can use for a custom implementation. Custom class must be the fully qualified Java class name and this class must be available on all POM servers in the system. For more information ,see <i>Developer Guide for Proactive Outreach Manager</i> .

Exception

This is the child node for Restrict and Custom Restrict nodes. Use the Exception node to exempt contacts from the parent restricting condition.

You can base the Exceptions on system or contact attributes.

Exception has no child node.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Type a name for the Exception node. If you do not specify a name, the default name is Exception.

Table continues...

Property Name	Description
Description	Use to specify the description for the Exception node.
Attribute Type	Attribute Type defines if the attribute is system or contact.
Attribute	Attribute drop-down gets its value based on the value in Attribute Type property. If the Attribute Type is system, the Attribute property displays the following options: day, date, and time. If the Attribute Type is contact, the Attribute property displays all contact attributes.
Operator	You can use the operator with the attribute and its values. You can select any operator from Contains, Equals, Not Equals, Is Null, Is Not Null. For example, if you have an attribute FirstName NOT EQUALS "Abc", then NOT EQUALS is an operator.
Value	Value property defines the actual value which evaluates the exception.
Min Value	If the value for the attribute is greater than the value in Min Value property, then all those contacts are exempted from restriction.
Max Value	If the value for the attribute is less than the value in Max Value property, then all those contacts are exempted from restriction.
Edit Description	Use to edit the description of the node.

 Note:

Date and Time based comparisons use the date and time format specified in **Global Date Format** field. Ensure that you specify the date and time without separators.

Example

In the above campaign, to restrict platinum card holders to receive calls; except those for whom the amount due is more than 50000, add Exception node under Restrict node. In the Attribute Type, select contact and the contact attribute which saves the due amount. In the Min Value attribute, put 50000. Now you can call all contacts who have due amount more than 50000, even if the card holders are platinum card holders.

Override

Use the Override node to override the Attribute and System Restrictions rules. Attribute and System Restrictions rules are restricting conditions which you can apply across all campaigns. So for one campaign, if you do not want to apply an Attribute and System Restrictions rule, you can override the restriction with the Override node.

Override node has [Exception](#) on page 247 node as a child node.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Type a display name for the Override node. If you do not specify a name, the default name is Override.
Description	Type a description for the Override node.

Table continues...

Property Name	Description
Global ID	Global ID is a mandatory property. In the Global ID list, POM displays the enabled Attribute and System Restrictions rule names. Using the Global ID, you can override the Attribute and System Restrictions from the rule. Also, you must set the condition to select the contacts to override in the Exception node. There is no direct way to override the restriction for all contacts. You can set such a condition, which are created by all contacts in the Exception node. For the migrated campaign restriction global rule, POM displays the ID of the earlier campaign restrictions.
Edit Description	Click to edit the description of the node.

Exception

Exception node under Override node works the same as Exception node under Restrict node.

The only difference is that Exception node under Override node exempts the contacts from the campaign restricting conditions, whereas Exception node under Restrict exempts the contacts from the campaign level restricting conditions.

All properties have the same functionality as that of Exception node under Restrict node.

* Note:

Date and Time based comparisons use the date and the time format specified in **Global Date Format** field. Ensure that you specify the date and time without separators.

Example

You have Attribute and System Restrictions to restrict all contacts who have received calls in last 72 hours and which has ID set to 2.

In one of the campaigns, to override this restriction for all contacts, you can set some condition which is generic and is met by all contacts.

You can select the AttributeType as system, Attribute as day, and Value as the current day for a campaign which runs for one day.

Alternatively, you can select some attribute, common to all contacts such as Salary, and set the MaxValue to a very high value such as 100000000000. So that if one of the conditions is met by all contacts, you can exempt them from the campaign restriction.

Sender's Address

* Note:

The Sender's Address node was referred to as ANI in releases before POM 2.5 Service Pack 1 release.

Use Sender's Address screen to set a conditional Sender's Address.

For example, to override the address set in the sender's address property of Call node, you can add a condition based Sender's Address.

Senders Address is dependent on the protocols used for dialing a contact.

- If you configure POM to use H.323 for dialing customer contact, POM does not use Sender's Address in the strategy. Instead Communication Manager has the control of setting Sender's Address/ANI/Caller ID for outgoing calls.
- If you configure POM to use SIP for dialing customer contact, POM uses Sender's Address in the strategy for setting Sender's Address/ANI/Caller ID.

Sender's Address node has one child node: [Condition](#) on page 248

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Type a name for the Sender's Address node. If you do not specify a name, the default name is Sender's Address.
Description	Type a description for the Sender's Address node.
Attribute for Sender's address	Click the attribute that contains the value you want to send as the sender's address when attempting the contacts. For example, if the selected attribute contains a value 8005551212, it is used as the sender's address in call attempts made from the Call task node. If the selected attribute contains a value name@email.com, it is used as the sender's address in email messages sent from the Mail task node.
Attribute for Condition	You can set the condition by using the Attribute for Condition property for a particular contact attribute. All contact attributes are prepopulated in the drop-down list. Values in the drop-down follow the multitenancy rules. For more information about multitenancy, see <i>Organizational Level Access</i> section in the <i>Administering Avaya Experience Portal</i> guide.
Edit Description	Use to edit the description for the Sender's Address node.

Condition

Use the Condition node to set the condition for Sender's Address (Calling ID for voice calls, SMC channel for SMS, and From Address for email). The condition you specify is evaluated, and if the condition matches, the Address set in Condition node is displayed or sent to the contact.

Condition has no child nodes.

Note:

Date and Time based comparisons use the date and time format specified in **Global Date Format** field.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Use this as a display name in the campaign strategy editor. If you do not specify a name, then the default name is Condition.
Description	Use to specify the description for Condition node.
Operator	Click the operator you want to use for the condition.
Value	The value set in the Value property is matched against the value of the Attribute for Condition property set in the Sender's Address node. If the value matches, the address set in the Address property is sent to the contact as the sender's address.
Min Value	If you select the Between operator, then the minimum and maximum values you set in the Min Value and Max Value properties are matched against the value of the Attribute for Condition property in the Sender's Address node. If the value of the Attribute for Condition property is between the minimum and maximum values, the address set in the Address property is sent to the contact as the sender's address. The Min Value property is available if you select Between in the Operator field.
Max Value	If you select the Between operator, then the minimum and maximum values you set in the Min Value and Max Value properties are matched against the value of the Attribute for Condition property in the Sender's Address node. If the value of the Attribute for Condition property is between the minimum and maximum values, the address set in the Address property is sent to the contact as the sender's address. The Max Value property is available if you select Between in the Operator field.
Address	Use the Address property to set the address to be sent if the condition matches.  Note: POM does not support non-English language characters for this field if Sender's Address is added under the Mail action node.

Application

Use the Application node as a container node, to invoke one of the available application types.

For Call action based on the value in the Value property, you select for the Result node.

For SMS and mail action, two child nodes are available: **AvayaNotify** and **Custom**. You can use only one node at a time.

Property Name	Description
Name	Use to specify the name for the application node.
Description	Use to specify the description of the application node.
Edit Description	Use to edit the description of the application node.

Agent

Use this node to specify the action to take for agent-based campaigns.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Use to specify a display name in the campaign strategy editor. If you do not specify any name, the default name is Agent.
Description	Use to specify a description of the node.
Agent Script	Use to specify the agent script that the system displays on the agent desktop.  Note: POM might display an agent script associated for Answer_Human to the agent even if POM detects an Answer_Machine to honor compliance timers.
Callback Parameters	
Preferred Agent Call back	Use to enable or disable the callback parameter. The parameter is enabled by default. If the parameter is disabled, then an agent cannot schedule a preferred agent callback.
Strict Agent Call back	Use to enable or disable the callback parameter. The parameter is enabled by default. If the parameter is disabled, then an agent cannot schedule a strict agent callback.
Campaign Call back	Use to enable or disable the callback parameter. The parameter is enabled by default. If the parameter is disabled, then an agent cannot schedule a callback for a campaign.
General Call back	Use to enable or disable the callback parameter. The parameter is enabled by default. If the parameter is disabled, then an agent cannot schedule a general callback.
Can Cancel Call back	Use to enable or disable the callback parameter. The parameter is enabled by default. If the parameter is disabled, then an agent cannot cancel a callback.
Nailing Call Timeout (sec)	Use to specify the time in seconds to wait for the agent to pick up the nailing call. The minimum value is 10 seconds and the maximum value is 1800 seconds.
Edit Description	Use to edit the description of the node.

Avaya Notify

Use Avaya Notify application to:

- Play the text if you use it under the Call action node.
- Send an SMS if you use it under the SMS action node.
- Send an email message if you use it under the Mail action node.

Avaya Notify does not have any child node.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Use as a display name in the campaign strategy editor. If you do not specify a name, then the default name is Avaya Notify.
Description	Use to specify a description for the Avaya Notify application.
Text ID	Notification Text IDs are pre-populated in the Text ID property drop-down list. You can use the notification text corresponding to the selected Text ID with the Avaya Notify application.
Edit Description	Use to edit the description for the Avaya Notify application.

Avaya Agent

Avaya Agent application is only available under **Call** action node.

Avaya Agent application is similar to **Avaya Notify** application, it also plays out the notification text when the call is answered, and additionally, transfers the call to the destination number you provide.

Avaya Agent application has no child node.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Use to specify a display name. The default name is Avaya Agent.
Description	Use to specify the description for Avaya Agent.
Destination	Provide a destination number to transfer the call after playing the notification text. If you provide VDN, then the call gets transferred to that VDN. POM does not verify if the agents are available to take the call before transferring it.  Note: If you do not enable the Enhanced CCA parameter in campaign strategy, then the Destination value for VDN is not considered by POM and the call is not routed to agent VDN. If you provide <code>tel:AvayaPOMAgent</code> as the destination, then the calls are transferred to a POM agent nailed to the respective campaign. Ensure you configure pacing parameters required for agent based campaigns.
Text ID	Text ID works in the same way as for Avaya Notify application.
The following fields are not applicable if you mention a VDN number in the destination:	
Callback Parameters	
Preferred Agent Call back	Use to enable or disable the callback parameter. The parameter is enabled by default. If the parameter is disabled, then an agent cannot schedule a preferred agent callback.
Strict Agent Call back	Use to enable or disable the callback parameter. The parameter is enabled by default. If the parameter is disabled, then an agent cannot schedule a strict agent callback.

Table continues...

Property Name	Description
Campaign Call back	Use to enable or disable the callback parameter. The parameter is enabled by default. If the parameter is disabled, then an agent cannot schedule a callback for a campaign.
General Call back	Use to enable or disable the callback parameter. The parameter is enabled by default. If the parameter is disabled, then an agent cannot schedule a general callback.
Can Cancel Call back	Use to enable or disable the callback parameter. The parameter is enabled by default. If the parameter is disabled, then an agent cannot cancel a callback.

Custom action node

Use this node to run the campaign using a custom implementation, and not use the standard call, SMS, or email action. This custom action uses the Application node and you must specify the custom application class name under the Application node. For information on creating the custom application, see *Developer's Guide for Proactive Outreach Manager*.

The Custom action node has four child nodes: [Restrictions](#) on page 239, [Address](#) on page 229, [Application](#) on page 249, and [Result Processors](#) on page 230.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Use this as a display name in the campaign strategy editor. If you do not specify a name, then the default name is Custom.
Description	Use to specify a description for the custom action node.
Restrict On No Suitable Address	If you set this property to Yes and if POM cannot attempt a record because of guard time restrictions, or minimum and maximum contact time restrictions, POM marks the record as temporary restricted. POM queues the record to the predefined POM queue for a retry. Set this property to No if you want POM to mark the records that cannot be attempted because of guard time restrictions, or minimum and maximum contact time restrictions as completed. POM assigns the Sys_No_Callable_Address completion code to such records. The default value is Yes.

Table continues...

Property Name	Description
Min Contact Time	MinContactTime defines the earliest time when the contact can be contacted. So from 00:00 to MinContactTime, you cannot make any calls. You can make the calls from MinContactTime to either MaxContactTime, if set, or until 23:59.  Note: If the MinContactTime is greater than the MaxContactTime then the condition is reverse, that is, you can make calls from MaxContactTime until 23:59 from the earlier day, and from 00:00 to MinContactTime, the next day. For example, MinContactTime is 23:00 and MaxContactTime is 05:00. Then you can make calls from 23:00 to 23:59 on the earlier day and from 00:00 to 05:00 on the next day. Date and Time based comparisons use the date and the time format specified in Global Date Format field. Min Contact Time must not be equal to Max Contact Time.
Max Contact Time	MaxContactTime defines the time till when you can make calls. So from MaxContactTime to 23:59, you cannot make any calls. You can make calls, either from 00:00 or MinContactTime, if set, till MaxContactTime. For example, if you are running a campaign and you do not want to make calls after 8pm, you can set the MaxContactTime to 20:00:00.
Re-check Interval (min)	Use this to specify a time interval after which when a contact attempt is restricted because it matched some restriction of type 'temporary' it will be again checked for all the restrictions defined in that handler. If no value is specified for this parameter then it will be considered as 1 minute.
Edit Description	Use to edit the description for the custom action node.

Url

Use Url application to assign the application Url, and call the application when the call is answered.

Url application node does not have any child node.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Use this as a display name in the campaign strategy editor. If you do not specify a name, then the default name is Url.
Description	Use to specify the description for the Url node.

Table continues...

Property Name	Description
Url	You can provide the application Url in the Url property. To add some contact attribute as part of the Url, then click Edit Url. The drop-down list has all contact attributes pre-populated. Select any contact attribute and then click Insert to insert at the cursor location in the Url. For example: To add a first name in the URL, you can mention: http:// <domain name>/hello.jsp?first_name= <firstName>&last_name=<lastName>, and select the \$first_name from the contact attribute drop-down.  Note: Multi-tenancy rules are applicable to the contact attribute drop-down. For information on multi-tenancy, see <i>Organizational level access</i> section in the <i>Administering Avaya Experience Portal</i> guide.
Edit URL	Use to edit the URL.
Edit Description	Use to edit the description for the URL node.

Retry

Use the **Retry** node to retry if you cannot reach the contact.

For example, if the number is busy then wait for a couple of minutes and then try calling back again.

Retry can have multiple address child nodes. If you specify more than one address child node, POM dials the nodes in the order in which you specify the nodes.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Use this as a display name in the campaign strategy editor. If you do not specify a name, then the default name is Retry.
Description	Use to describe the retry node.

Table continues...

Property Name	Description
Count	Use this option to set the maximum number of retry attempts. While processing the result (result is the completion code of the previous attempt) of a retry attempt, POM counts all the previous retries attempted for that contact within that handler, and then makes the next retry attempt. POM makes a retry attempt only if the number of previous retry attempts is less than the value that you specified in the Count parameter of Retry node for that result. After exhausting all retry attempts, POM moves the contact to the state or handler mentioned in the <code>FailState</code> in the Retry node. In the existing logic, POM maintains the count at the action node level which is global to all Retry nodes under the action node. You can enable the option in POM to maintain the retry count at the completion code level. For more information, see example 4 in Examples of Retry on page 256. To enable the option, select the Retry Count per Completion Code check box on the Global Configurations page.
Interval (sec)	Use to set the time in seconds to wait before a retry. For example, if you specify the Count as 3 and Interval as 10, 20, 30, POM attempts the first retry after 10 seconds, the second retry after 20 seconds, and the third retry after 30 seconds. If you specify the Count as 3 and Interval as 20, POM attempts each retry after 20 seconds.
Address Looping	You can choose to Enable or Disable the address looping. If you enable Address Looping and you have specified the Count as 6 and have defined 2 addresses, POM attempts the first retry on the first address and the second retry on the second address. Since the Count is 6, but there are only 2 addresses, POM will attempt the third retry again on the first address, and then the fourth retry again on the second address in a loop manner till the number of retries matches the value specified in the Count field. If you disable Address Looping, POM selects the first matching address from all addresses under the Retry node after evaluating the minimum and maximum times specified for the addresses. POM attempts the next address only if the previous address is restricted due to the minimum and maximum times.
Fail State	Use to move the contact to Fail State if all retries fail.  Note: If you set the Fail State to Wait, then after all the retry attempts, the contact does not move to another handler. The campaign does not stop after attempting all the contacts and remains in Running state.
Edit Description	Use to edit the description of the retry node.

Related links

[Examples of Retry](#) on page 256

[Examples of address looping](#) on page 257

Examples of Retry

Consider a campaign strategy where the retries are set as follows:

Result	Count	Interval	FailState
Call Busy	2	30	done
Ring No answer	4	60	done

See the following examples for the behavior of POM in different scenarios.

Example 1

1. POM makes the first attempt to contact the customer and gets the completion code as Call Busy.
2. A retry is mentioned on Call Busy so the first retry will be made after 30 seconds. POM again gets the completion code as Call Busy.
3. Second retry will be made after 30 seconds. POM gets the completion code as Ring No Answer.
4. A retry is mentioned on Ring No Answer so the third retry will be made after 60 seconds. POM gets the completion code as Call Busy.
5. While processing Call Busy POM has already made 3 retries, whereas the allowed value is only 2, so POM does not attempt the contact and the contact will move to fail state specified here as done.

Example 2

1. POM makes the first attempt to contact the customer and gets the completion code as Call Busy.
2. A retry is mentioned on Call Busy so the first retry will be made after 30 seconds. POM again gets the completion code as Call Busy.
3. Second retry will be made after 30 seconds. POM gets the completion code as Ring No Answer.
4. A retry is mentioned on Ring No Answer so the third retry will be made after 60 seconds. POM gets the completion code as Ring No Answer.
5. Fourth retry will be made after 60 seconds. POM gets the completion code as Ring No Answer.
6. While processing Ring No Answer POM has already made 4 retries whereas the allowed value is only 4, so POM does not attempt the contact and the contact will move to fail state specified here as done.

Example 3

1. POM makes the first attempt to contact the customer and gets the completion code as Ring No Answer.
2. A retry is mentioned on Ring No Answer so the first retry will be made after 60 seconds. POM again gets the completion code as Ring No Answer.
3. Second retry will be made after 60 seconds. POM gets the completion code as Call Busy.

4. While processing Call Busy POM has already made 2 retries whereas the allowed value is only 2, so POM does not attempt the contact and the contact will move to fail state specified here as done.

Example 4

Enhancement in the Call Retry logic:

1. POM makes the first regular attempt to contact the customer. This call attempt results in `Call Busy` completion code.
2. POM makes the next attempt from the retry node after 30 seconds. Again, this attempt results in `Call Busy`. Retry count for `Call Busy` completion code is now 1.
3. Before launching the next retry attempt from `Call Busy` retry node, POM compares the `Call Busy` retry count against the configured retry count. Retry count for `Call Busy` is 1 and configured retry count is 2.
4. POM makes the second retry after 60 seconds. This attempt results in `Ring No Answer`. Retry count for `Ring No Answer` completion code is now 1.
5. Before launching the next retry attempt from `Ring No Answer` retry node, POM compares the `Ring No Answer` retry count against the configured retry count. Retry count for `Ring No Answer` is 1 and the configured retry count is 4.

In case of the existing logic, in `Ring No Answer` completion code, POM would count from 2 as POM maintains the retry count at the action node level.

As per the new enhancement, in `Ring No Answer` completion code, POM counts from 1 as POM maintains the retry count at the completion code level.

After the retry count for a specific completion code reaches the retry count that is configured for that completion code retry node, POM executes the next state mentioned in the `Fail State`.

Related links

[Retry](#) on page 254

Examples of address looping

Consider the following examples of address looping in a campaign strategy.

Example 1

Consider you want to make a main attempt on phone 1 and 3 retries on phone 2, phone 3, and phone 4 respectively. To achieve this, do the following:

1. Use Phone 1 as address under the **Call** node.
2. Drag 3 addresses under **Retry**.
3. Select Phone 2 for first address, Phone 3 for second and Phone 4 for third.

Example 2

Consider you want to make 1 main attempt and 5 retries using 2 addresses in the sequence:

- Phone 1
- Phone 2

- Phone 1
- Phone 2
- Phone 1
- Phone 2

To achieve this, do the following:

1. Use Phone 1 as address under the **Call** node.
2. Drag 2 addresses under **Retry**.
3. Select Phone 2 for first address, and Phone 1 for second.

Example 3

Consider you want to make a main attempt on phone 1 and 4 retries on phone 2, phone 1, phone 3, and phone 3 respectively. To achieve this, do the following:

1. Use Phone 1 as address under the **Call** node.
2. Drag 4 addresses under **Retry**.
3. Select Phone 2 for first address, Phone 1 for second, Phone 3 for third and fourth.

Example 4

Consider you want to make a main attempt on phone 1 and 4 retries on 3 different numbers with a time restriction on second retry phone number. Also, the second retry phone number falls in the min and max time.

To achieve this, do the following:

1. Use Phone 1 as address under the **Call** node.
2. Drag 3 addresses under **Retry**.
3. Select Phone 2 for first address, Phone 3 for second, and Phone 4 for third.
4. For Phone 3 address, set the min and max time.
5. Set the retry count to 4.
6. The retry sequence will be:
 - First retry to Phone 2.
 - Second retry to Phone 4.
 - Third retry to Phone 4.
 - Fourth retry to Phone 2.

Consider the following example of address looping if you enable the skip empty address looping option.

Example of address looping

To attempt one call to the database with the completion code set to **Contact_Address_Empty**, do the following:

1. Use Phone 1 as address under the **Call** node.

The Phone 1 value is empty.

2. Drag an address under **Retry**.

Related links

[Retry](#) on page 254

SMS

Use the SMS node to send SMS. The SMS node has 5 children nodes; Restrictions, Address, Sender's address, Applications, and ResultProcessors.

* Note:

Ensure that the value of "Next State" property of the Result Processor node is set to "wait" and you have a Result handler for SMS Delivered with the value of "Next State" property set to "done". The notifications and delivery receipts are considered as inbound traffic. For more information about capacity and pacing on Avaya Experience Portal, see Avaya Experience Portal documentation.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Use this as a display name in the campaign strategy editor. If you do not specify a name, then the default name is SMS.
Description	Use to specify the description for SMS node.
Sender's Address	Use to specify the sender's address to be displayed to the recipient of the SMS message. If the Sender's Address node is not added, POM uses the sender's address value defined in this parameter.
Restrict On No Suitable Address	If you set this property to Yes and if POM cannot attempt a record because of guard time restrictions, or minimum and maximum contact time restrictions, POM marks the record as temporary restricted. POM queues the record to the predefined POM queue for a retry. Set this property to No if you want POM to mark the records that cannot be attempted because of guard time restrictions, or minimum and maximum contact time restrictions as completed. POM assigns the Sys_No_Callable_Address completion code to such records. The default value is Yes.

Table continues...

Min Contact Time	MinContactTime defines the earliest time when POM can send the SMS. So from 00:00 to Min Contact Time, you cannot send any SMS. You can send the SMS from Min Contact Time to either Max Contact Time, if set, or till 23:59.  Note: If the Min Contact Time is greater than the Max Contact Time then the condition is reverse, that is, you can send SMS from Max Contact Time till 23:59 from the earlier day, and from 00:00 to Min Contact Time, the next day. For example, Min Contact Time is 23:00 and Max Contact Time is 05:00. Then you can send SMS from 23:00 to 23:59 on the earlier day and from 00:00 to 05:00 on the next day. Date and Time based comparisons use the date and time format specified in Global Date Format field. Min Contact Time must not be equal to Max Contact Time.
Max Contact Time	Max Contact Time defines the time till when you can make calls. So from Max Contact Time to 23:59, you cannot send any SMS. You can send SMS, either from 00:00 or Min Contact Time, if set, till Max Contact Time. For example, if you are running a campaign and you do not want to send SMS after 8pm, you can set the Max Contact Time to 20:00:00.
Re-check Interval (min)	Use this to specify a time interval after which when a contact attempt is restricted because it matched some restriction of type 'temporary' it will be again checked for all the restrictions defined in that handler. If no value is specified for this parameter then it will be considered as 1 minute.
On Media Server Failure	On Media Server Failure has two values in the drop-down; retry or no_retry. If you choose retry, you can keep on trying to establish a connection with the media server. If you choose no_retry, then you can mark the disposition as Media_Server_Failure and move to the next contact.
Edit Description	Use to edit the description for the SMS node.
Applications	
SMS Application	The application to be used for inbound SMS and delivery receipts. This field displays the shipped POM SMS applications and custom SMS applications.
Pacing Parameters	
SMS Pacing Type	Use to select the pacing type as None, Time-based, or Skill-based.  Note: The <i>Skill Based Call Pacing Type</i> is not visible if you have installed POM in Oceana mode.
If you select the SMS Pacing Type as Time-based, you see the following additional fields:	
Pace	Use to specify the number of SMSs to send.
SMS Pace Time Unit	Use to specify the number of SMS to send for the selected time unit. You can specify the time unit in seconds, minutes, and hour. For example, 5 SMSs to be sent per minute.
If you select the SMS Pacing Type as skill-based, you see the following additional fields:	

Table continues...

Skill	Use to specify the inbound skill to monitor. If you disable the skill for pacing, while the skill-based campaign is running, the changes do not take effect immediately on the running campaign. You must stop the skill-based campaign manually and change the skill being monitored from the campaign strategy.
Parameter	Use to select a parameter for the skill-based pacing. The options are: Avg. Speed of Answer, Expected Wait Time, Queue Length, and Service Level.
Expected Wait Time	You can edit this property only when you select value Expected Wait Time in the Parameter property. You can select either High , Med , Low , or a combination of these values. When you click SHOW SOURCE button to view the XML file, the "ewtLevels" key value pair with selected levels is displayed on the screen.
Desired Value	Depending on the parameter you select, specify different values. For Expected Wait Time, specify a valid integer value between 1 to 7200. For Service Level, specify a valid integer value between 1 to 100 .For Avg Speed of Answer, specify a valid integer value between 1 to 1000 .For Queue Length, specify a valid integer value between 1 to 7200.
Initial Pace	Use to specify the number of SMSs POM can send in the Pace Interval .
Pace Interval	Use to specify the time unit for pacing. The options are: Hour, Minute, and Second.
Pacing Variation (%)	Use to specify the % value of pace using which the actual pacing is varied to match the maximum pace. POM also uses the value you specify to match or reduce the pacing to match to the initial pace.
Max Pace	Use to specify a maximum pace value with which the campaign can run. The value must be between 1 and 500000.
Edit Description	Use to change the description of the node.

Mail

Use the mail node to send an email message.

The Mail node has 6 children nodes; Restrictions, Address, Sender's address, Attachment, Application, and ResultProcessors.

The Application node under Mail node has AvayaNotify and CustomMail as child nodes.

In the Address node's Contact Attribute property, only the type email contact attributes are displayed in the drop-down list.

Note:

Ensure that the value of "Next State" property of the Result Processor node is set to "wait" and you have a Result handler for Email Delivered with the value of "Next State" property set to "done". For more information about capacity and pacing on Avaya Experience Portal, see Avaya Experience Portal documentation.

The following table lists the properties of the node and their descriptions:

Property Name	Description
Name	Use this as a display name in the campaign strategy editor. If you do not specify a name, then the default name is Mail.
Description	Use to specify a description for the Mail node.
Sender's Address	Sender's Address defines the Sender's address that is displayed to the recipient. If the Sender's address node is not added, then use this Sender's Address as Sender's address.  Note: POM does not support non-English language characters for this field.
Sender's Display Name	Use to specify the name displayed as the Sender's email id.
Reply To	Use to specify the address where the receiver sends a reply.
Restrict On No Suitable Address	If you set this property to Yes and if POM cannot attempt a record because of guard time restrictions, or minimum and maximum contact time restrictions, POM marks the record as temporary restricted. POM queues the record to the predefined POM queue for a retry. Set this property to No if you want POM to mark the records that cannot be attempted because of guard time restrictions, or minimum and maximum contact time restrictions as completed. POM assigns the Sys_No_Callable_Address completion code to such records. The default value is Yes.
Min Contact Time	Min Contact Time defines the earliest time when POM can send the email message. So from 00:00 to Min Contact Time, you cannot send any email messages. You can send the email messages from Min Contact Time to either Max Contact Time, if set, or till 23:59.  Note: If the Min Contact Time is greater than the Max Contact Time then the condition is reverse, that is, you can send email messages from Max Contact Time till 23:59 from the earlier day, and from 00:00 to Min Contact Time, the next day. For example, Min Contact Time is 23:00 and Max Contact Time is 05:00. Then you can send email messages from 23:00 to 23:59 on the earlier day and from 00:00 to 05:00 on the next day. Date and Time based comparisons use the date and time format specified in Global Date Format field. Min Contact Time must not be equal to Max Contact Time.
Max Contact Time	Max Contact Time defines the time till when you can send email messages. So from Max Contact Time to 23:59, you cannot send any email messages. You can send email messages, either from 00:00 or Min Contact Time, if set, till Max Contact Time. For example, if you are running a campaign and you do not want to send email messages after 8pm, you can set the Max Contact Time to 20:00:00.

Table continues...

Re-check Interval (min)	Use this to specify a time interval after which when a contact attempt is restricted because it matched some restriction of type 'temporary' it will be again checked for all the restrictions defined in that handler. If no value is specified for this parameter then it will be considered as 1 minute.
On Media Server Failure	On Media Server Failure has two values in the drop-down; retry or no_retry. If you choose retry, you can keep on trying to establish a connection with the media server. If you choose no_retry, then you can mark the disposition as Media_Server_Failure and move to the next contact.
Edit Description	Use to edit the description of the Mail node.
Applications	
Mail Application	The application to be used for inbound email messages and delivery receipts. This field displays the shipped POM email applications and custom email applications.
Pacing Parameters	
If you select the Pacing Type as Time-based you see the following additional fields:	
Pace	Use to specify the number of email messages POM can send per second. You can specify a value between 1 and 1000000.
Mail Pace Time Unit	Use to specify the time unit for pacing. The options are: Hour, Minute, and Second.
If you select the Pacing Type as Skill-based you see the following additional fields.	
 Note: The <i>Skill Based Call Pacing Type</i> is not visible if you have installed POM in Oceana mode.	
Skill	Use to specify the inbound skill to monitor. If you disable the skill for pacing, while the skill-based campaign is running, the changes do not take effect immediately on the running campaign. You must stop the skill-based campaign manually and change the skill being monitored from the campaign strategy.
Parameter	Use to select a parameter for the skill-based pacing. The options are: Avg. Speed of Answer, Expected Wait Time, Queue Length, and Service Level.
Expected Wait Time	You can edit this property only when you select value Expected Wait Time in the Parameter property. You can select either High , Med , Low , or a combination of these values. When you click SHOW SOURCE button to view the XML file, the "ewtLevels" key value pair with selected levels is displayed on the screen.
Desired Value	Depending on the parameter you select, specify different values. For Expected Wait Time, specify a valid integer value between 1 to 7200. For Service Level, specify a valid integer value between 1 to 100. For Avg Speed of Answer, specify a valid integer value between 1 to 1000. For Queue Length, specify a valid integer value between 1 to 7200.
Initial Pace	Use to specify the number of SMSs POM can send in the Pace Interval .

Table continues...

Pace Interval	Use to specify the time unit for pacing. The options are: Hour, Minute, and Second.
Pacing Variation (%)	Use to specify the % value of pace using which the actual pacing is varied to match the maximum pace. POM also uses the value you specify to match or reduce the pacing to match to the initial pace.
Max Pace	Use to specify a maximum pace value with which the campaign can run. The value must be between 1 and 500000.
Edit Description	Use to change the description of the node.

Custom

A **Custom** node can be used under **Application** node. When a **Custom** node is used under **Application** node inside **Custom** action, POM uses the specified Java implementation to carry out custom action or result processing. When it is used under **Application** node inside a **Call**, **SMS**, or **Mail** action, you must select the built in Avaya Orchestration Designer application for the actions to be taken for calls, SMSs, or mails. You can also configure your own custom applications from **System Configuration > Applications**.

When you select **Custom** action in the **Application** node, and configure your own custom applications, then the custom application is invoked for a **Call**, **SMS**, or **Mail** action.

Important:

For custom **Call**, **SMS**, or **Mail** applications, ensure you provide the text that you want to send/play through calls, SMS or mail, in the custom application

Custom node does not have any child node.

Related links

[Custom Mail action](#) on page 264

[Custom SMS action](#) on page 265

Custom Mail action

A **CustomMail** node can be used in **Application** node of **Mail** action. When you use the **CustomMail** node in **Application** node of a **Mail** action, you must select the built in Avaya Orchestration Designer application for the actions to be taken for the e-mails. You can also configure your own custom applications from **System Configuration > Applications**. When you configure your own custom applications, then the custom application is invoked for the **Mail** action.

A **CustomMail** node does not have any child node.

Property	Value
Name	Use this as a display name in the campaign strategy editor. If you do not specify a name, then the default name is Custom.
Description	Use to specify a description for the Custom action

Table continues...

Property	Value
Application(e-mail)	Select the desired Avaya Orchestration Designer application from the drop down. An Avaya Orchestration Designer application shows up in the list only when it is configured as POM Application in Avaya Experience Portal.  Important: For custom Mail application, ensure you provide the text that you want to send through e-mail, in the custom application

Related links

[Custom](#) on page 264

Custom SMS action

A **Custom** node can be used in the **Application** node of an **SMS** action. When you use the **Custom** node in **Application** node of an **SMS** action, you must select the built in Avaya Orchestration Designer application for the actions to be taken for the SMSs. You can also configure your own custom applications from **System Configuration > Applications**. When you configure your own custom applications, then the custom application is invoked for the **SMS** action.

A **Custom** node does not have any child node.

Property	Value
Name	Use this as a display name in the campaign strategy editor. If you do not specify a name, then the default name is Custom.
Description	Use to specify a description for the Custom action
Application(SMS)	Select the desired Avaya Orchestration Designer application from the drop down. An Avaya Orchestration Designer application shows up in the list only when it is configured as POM Application in Avaya Experience Portal.  Important: For custom SMS application, ensure you provide the text that you want to send through SMS in the custom application

Related links

[Custom](#) on page 264

Attachment

Attachment node is used to send attachments with the mail. You can add up to 10 attachments. The total size of the attachments should be in the range supported by standard email exchange servers, that is, 10–25 MB. If the size of the attachments is very huge, the campaign can get stuck if you have retry enabled for the campaigns.

Ensure that the attached file does not have blank spaces in the file name.

Attachment node is used as a container node for its only child node URL.

Property	Value
Name	Use to specify a name for the attachment node.
Description	Use to specify the description for the attachment node.
URL	Use to specify the location and name of the file to be sent as an attachment. The file must be accessible over http or must be a file available on the POM server. Specify the http url of the file or the file path. Specify the file path as <code>file:/// <absolute path></code> and ensure that you have the desired permission. For example, <code>file:///tmp/attachment/avya.jpg</code>

Silence call detection

Silence Call Detection overview

The Silence Call Detection feature provides different methods to handle a call when the platform does not detect voice energy.

The Silence Call Detection feature is available only for Call nodes with Progressive or Predictive call pacing type.

In POM, when an outbound call connects, the call is answered by the customer, an answering machine, or passes through the call classification timeouts. If a call is answered and no voice energy is detected, MPP generates a Call Classification Analysis (CCA) timeout event. This event enables POM to mark the call as Answer Human. Answer Human is the same as a customer answering a call.

On CCA timeout, a resulting action occurs based on the following configuration of the silence call parameter:

- Silence call detection is ON: POM defines the call flow as per the campaign strategy.
- Silence call detection is OFF: POM classifies the call as Answer Human.

You can configure different actions for a Result node with the Silence Detected value.

If POM detects a Silence Call (Silence Detected result), POM performs one of the following actions based on the configuration:

- Connects the call to an agent.
- Runs an application.
- Retry the same or different phone number based on the Retry node configuration in the campaign strategy.

Configuring Silence Call Detection

About this task

The **Silence Call Detection** option is present under the Call Classification Analysis (CCA) parameters of a Call task node.

Before you begin

You can enable Silence Call Detection only if:

- Enhanced CCA parameter is ON.
- Pacing type is Progressive, Cruise Control, Expert Call Ratio, Custom, None, Skill Based, or Time Based.
- Compliance timers are disabled on the Campaign Creation page.
- **Strict Nuisance Reporting** is disabled in **Agent Settings** in Global Configuration.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Campaign Strategies**.
3. On the Campaign Strategies page, in **Name**, click the campaign strategy you want to edit.
4. In the **CCA Parameters** area of the Call task node, set the **Silence Call Detection (SCD)** property to ON.
5. Add a Result node to handle the silence call and provide an action.

The Silence Detected completion code is available in the Result node.

The following nodes are available under the Result node to provide an action for a silence call.

- **Retry**: To retry the call.
- **Agent**: To provide the details of an agent to whom the call needs to be routed.
- **Application**: To run an application, such as, play notification, play notification text, and route call to an agent.

6. Click **SAVE**.

Allowing to change the pacing type of a Call task node in real time

About this task

Use this procedure to allow changing the pacing type of a Call task node in real time from the Supervisor Dashboard.

Note:

The **Runtime Change Pacing Type** property is available in a Call task node only if you set the **Call Pacing Type** property of the Call task node to Preview, Progressive, Cruise Control, or Expert Call Ratio.

For more information about this feature, see *Avaya Proactive Outreach Manager Overview and Specification*.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.

2. On the **Campaigns** menu, click **Campaign Strategies**.
3. On the Campaign Strategies page, in **Name**, click the campaign strategy.
4. In the Campaign Strategy Editor, click the Call task node.
5. In the **Pacing Parameters** area, set the **Runtime Change Pacing Type** property to **ON**.
6. Click **Save**.

Result

The **Runtime Pacing** feature is available for the Call task node in the Supervisor Dashboard. A Supervisor Dashboard user can use this feature to change the pacing type of the Call task node and configure parameters specific to the new pacing type in real time.

In real time, a user can change the pacing type only between Preview, Progressive, Cruise Control, and Expert Call Ratio.

For attribute-based campaigns, a user can change the pacing type only between Preview and Progressive.

Next steps

- If you expect a user to enable the following options in real time, you must perform the required configuration in the campaign strategy:
 - **Background AMD** and set **Action On AMD** to **Continue with Agent** or **Leave a Voice Mail**
 - **Silence Call Detection**

For more information about the required campaign strategy configuration, see [Campaign strategy configuration for handling real-time change in the pacing type of a Call task node](#) on page 268.

- If you expect a user to change the pacing type of a Call task node to Cruise Control in real time, ensure you reset the cruise control parameters in POM to support the per day nuisance limit for the cruise control algorithm.

For more information, see [Reset Cruise Control Pacing Parameters](#) on page 677.

Campaign strategy configuration for handling real-time change in the pacing type of a Call task node

If you set the **Runtime Change Pacing Type** property of a Call task node to ON in the campaign strategy, then under the Call task node, you can also add Result nodes relevant to the new pacing type a user can potentially specify in real time for the Call task node.

Otherwise, POM automatically creates an appropriate Result node when a user changes the pacing type in real time. POM replicates the callback parameters from the old nodes in the new nodes.

For example, your campaign strategy contains a Call task node with Progressive pacing type. The Call task node contains a Result node (Answer Human). The Result node contains the Application and Avaya Agent child nodes. When a user changes the pacing type of the Call task node to Preview in real time, POM automatically creates another Result node (Call Answered) with an Agent child node. POM replicates the callback parameters from the Avaya Agent child node in the Agent child node.

However, if you expect a user to perform the following real-time pacing and CCA parameter changes from the Supervisor Dashboard, you must manually perform the required configurations in the campaign strategy:

Pacing type a user might specify in real time	CCA parameter changes a user might perform in real time	Configuration you must perform under the Call task node in the campaign strategy
Progressive, Expert Call Ratio, or Cruise Control	Enable Background AMD and set Action on AMD to Continue with Agent .	If the Call task node already contains an Agent node, POM uses the Agent node for handling Continue with Agent .
Progressive, Expert Call Ratio, or Cruise Control	Enable Background AMD and set Action on AMD to Leave a Voice Mail .	Configure the following: - Result node (Answer Machine) with an Application child node. - Under the Application node, configure an Avaya Notify, Custom, or URL child node.  Note: If you do not perform this configuration in the campaign strategy, the Supervisor Dashboard shows an error message when a user selects Leave a Voice Mail in real time.
Progressive, Expert Call Ratio, or Cruise Control	Enable Silent Call Detection .	Configure the following: Result node (Silence Detected) with an Application, Retry, or Agent child node. If a user enables Silence Call Detection in real time, the action POM performs for a silence call depends on this configuration. For example, POM plays an application or connects the call to an agent.  Note: This is an optional configuration. If you do not perform this configuration and a user enables Silence Call Detection in real time, POM disconnects a call if it detects it as a silence call. Additionally, perform the prerequisites for Silence Call Detection. For more information, see Configuring Silence Call Detection on page 266.

Rules

Overview

Rules are restrictions that you can configure for outreach attempts based on contact or address, number of attempts, channel, last attempt completion code, nuisance frequency, or attribute and system values such as, DNC, day, date, and time.

For example, you can create a rule to allow maximum three attempts in 24 hours. You can use the rule editor to configure rules. The Rule service must be running while performing any action in the rule editor. Otherwise, POM displays an error message.

Rule editor supports multitenancy.

If your user account is assigned the Experience Portal administrator role or POM Campaign Manager role, then by default, you have access to the rule editor. You can also create a custom role for accessing the rule editor.

In the rule editor, you can:

- Configure rules that can be applied to all or specific campaigns.
The rules created by a user are associated with the organization the user belongs to. When creating a rule, the owner organization information is stored in PIM_Rule table.
- Exclude rules for callbacks, redial, external consult, manual, or preview type of campaigns.
- Apply rules for voice, SMS, email, or custom type of channel.
- Apply rules for contact address or contact record. A contact record is identified based on the contact ID you provide while importing the contact record into the POM system.
- Apply rules based on completion codes.
- Identify attempts that are restricted due to rules with custom completion codes.
- Enable or disable rules, retaining the campaign association, for a particular zone.
- Change the order in which the system and user-defined rules are run at a campaign level for a specific zone.
- Edit a rule at run time in a running campaign.
- Delete a rule. You can also delete a rule associated with a running campaign. When you delete a rule, the campaign and job association with the rule is removed.
- Create custom rules by using a custom Java class.

For more information about creating a custom class for custom rules, see *Developer Guide for Proactive Outreach Manager*.

Note:

You cannot configure rules with duration greater than the data retention period configured in the purge schedule. If you modify the purge schedule, ensure you modify the rules accordingly if required.

You can configure strategy restrictions, attribute and system restrictions, and rules. The order of precedence is: strategy restrictions, attribute and system restrictions, and then rules.

Based on the completion code specified in the rule that restricts a contact, you can create a handler node in the campaign strategy. In a campaign strategy, POM supports only one action for each handler node.

For example,

- Before making an attempt, Campaign Manager checks if the rule engine has restricted any calls by the 24Hours_AMD rule. If the contact is restricted by the 24Hours_AMD rule, you can switch the attempt to Preview mode.
- If a contact list is associated with two different campaigns and the same records are selected after applying filter in both the campaigns, all records may get dialed from both the campaigns. If you want a contact to be dialed only once regardless of its selection in any of the campaigns, create a rule by using the rule editor.

You can configure the rule at a global or campaign level to restrict the number of dialing attempts made on a contact or address within a specified time.

For example, you can create a rule to dial a contact only once in 24 hours. If you create such a rule at a global level, a contact is dialed only once in 24 hours even if it is part of multiple campaigns. If you create such a rule at a campaign level, then associate the rule with the campaigns where such behavior is desired.

Limitations

The rule editor has the following limitation:

- The rules are applied at zone level, but the rule engine counts the attempts across all zones for a contact. Also, the rules are specific to any particular organization.

Rule association with organizations

Every rule created is associated with the organization. When creating a rule, the owner organization information is stored in PIM_Rule table. The rules created are owned by the user organization. The organization association with the rules does not specify if user is default organization, they can associate rules to multiple organizations.

Rules association behavior for different roles:

- If a user is logged in as a default organization user, the user can view and edit all rules irrespective of the rule being created by any organization.
- If user is logged in as organization-specific user, the user can view only the rules that are associated with the specific organization. The user cannot edit any rules, but can view the rules created.

When creating a rule, if the rule is marked as All Organizations, it cannot be modified to be assigned to specific organizations later. The default organization user can view and edit rules created by other organization user. The default organization user cannot modify the organization association for those rules.

Important:

When you create a new organization in Experience Portal, an organization-specific rule order is created and all global rules that are marked as All Organization are added under this order for the new organization. When the organization is deleted, rule association for this organization which is created at the global and campaign level is also deleted. Rules earlier

associated with this organization do not exist. Rules which were earlier associated with a campaign mapped with this organization are also removed from the association.

Creating a rule

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Rules**.
3. On the Rules page, click **New Rule**.
4. On the New Rule page, add the relevant details.
5. Click **Save**.

New / Edit Rule page field descriptions

Details tab

Field Name	Description
Name	Type a unique name for the rule. The maximum allowed length is 80 characters. Rule name cannot contain the following special characters: {, (, @, ~, `, !, ', ;, ,, #, \, \$, %, &, ?, ", <, >,), }, and space After you create a rule, you cannot edit its name.
Description	Type a description for the rule.

Rule Definition tab

Field Name	Description
All Organizations	Enable this option if you want to apply the rule to all organizations. This option is available only to the default Organization user.

Table continues...

Field Name	Description
Available Organizations	The area displays the list of available organizations. To associate organizations with the rule, do any of the following: • To associate a specific organization with the rule, click + corresponding to the organization. • To associate all available organizations with the rule, click Add All. If an Organization user creates the rule, POM associates the rule with the organization of that user. The Available Organizations area is available only to a default Organization user after you disable the All Organizations option.
Selected Organizations	Displays the organizations associated with the rule. To remove an organization association from a rule, do any of the following: • To remove a specific organization association from the rule, click — corresponding to the organization. • To remove all organization associations from the rule, click Remove All. The Selected Organizations area is available only to a default Organization user after you disable the All Organizations option.
Apply To	Specify whether you want to apply the rule to all campaigns or specific campaigns. The following are the options: • All Campaigns: Select this option to apply the rule automatically to all configured campaigns of all organizations. • Selected Campaigns: Select this option to apply the rule manually to specific campaigns. For more information about manually associating a rule with a campaign, see New / Edit Campaign page field descriptions on page 78 and Associating and disassociating rules with a campaign on page 120. After you create a rule, you cannot edit this option.

Table continues...

Field Name	Description
Restrict On	Specify whether the attempt must be restricted on contact or address. • Contact: Select this option to restrict the attempt for the entire contact record. A contact record is identified based on a user contact ID that you provide while importing a contact record into the POM system. If two different contacts in two separate contact lists have same user contact ID, the rule engine considers them as the same contact. Hence, if the rule restricts one contact record, it also restricts the other contact record having the same user contact ID. A contact record might have multiple addresses. When you restrict an attempt on a contact, attempts to all addresses for that contact record are restricted. A contact address can be a phone number or email address. • Address: Select this option to restrict attempts only on a specific address of a contact record. When you select Address, the Address Attribute field is displayed. Restrict On is unavailable if you select Attribute and System Restrictions in the Rule Category field.

Table continues...

Field Name	Description
Address Attribute	Click the address attribute on which you want to apply the rule. This field displays all attributes of type Phone and E-Mail in addition to the following attributes: • All: To apply the rule on all address attributes of the contact and on external number. • All Contact Address Attribute: To apply the rule on all address attributes of the contact, except external number. • External Number: To apply the rule on an external number. For example, a number manually entered by an agent. • Current Address: To apply the rule on the current number that POM dials regardless of the phone attribute it is a part of. With this option, there is no need to create multiple rules for each phone attribute. For all new rules, this option is the default option. The Address Attribute field is available if you select Address in the Restrict On field.
Activate Rule	Enable this option to enable the rule. Disable this option to disable the rule.
Channel Type	Click the channels on which you want to apply the rule. You can select multiple channels. The following are the options: • Voice • Email • SMS • Custom POM applies the rule only for the selected channels. For example, if you select Voice channel, POM applies the rule only for Voice channel and not for SMS, Email, and Custom channels.

Table continues...

Field Name	Description
Exclude if current attempt type	Click the type of attempt on which you do not want to apply the rule. You can select multiple attempt types at a time. You can exclude the rule for the following attempt types: • Preview • Callback • Redial • External Consult • Manual For example, if you select the Exclude if current attempt type as Callback, the rule does not run for callback attempts.

Table continues...

Field Name	Description
Rule Category	Click the type of rule you want to create. The following are the options: • Attempt Frequency: Select this option to create a rule that restricts attempts beyond the maximum attempts allowed in the specified duration. For example, you can create a rule to allow maximum two attempts in the last 3 hours. • Attempt Completion Code: Select this option to create a rule that restricts attempts based on the previous completion code within the specified duration. For example, if a contact received a Disconnected By User CCA completion code in last 24 hours, restrict the contact. • Custom: Select this option to create a custom rule that restricts a contact attempt. For more information about creating a custom class for a custom rule, see <i>Developer Guide for Proactive Outreach Manager</i>. • Nuisance Frequency: Select this option to create a rule that restricts attempts based on the frequency of nuisance calls. For example, you can create a rule to allow maximum two nuisance calls in the last 3 hours. • Attribute and System Restrictions: Select this option to create a rule that restricts the attempts based on the attribute and system restriction values.  Note: If the address you select for dialing is already in progress, the rule engine rejects that contact and marks the contact with the completion code as <code>Rejected Due To Attempt Already In Progress</code>. Depending on the option you select in this field, additional fields are displayed in the rule editor. After you create a rule, you cannot edit its category.
Attempt Frequency: The Attempt Frequency area is displayed if you select Attempt Frequency in the Rule Category field.	

Table continues...

Field Name	Description
Attempt From	Use to specify whether you want the rule engine to count the attempts from currently running campaign, all running campaigns of the current organization, or all running campaigns of all organizations. The options that are displayed depend on whether Organization is enabled in Avaya Experience Portal. If Organization is enabled, the following options are displayed: • All Organizations: Select this option if you want to restrict attempts on a contact based on the previous contact attempts from all campaigns of all organizations. • Current Organization: Select this option if you want to restrict attempts on a contact based on the previous contact attempts from all campaigns of the current organization. • Current Campaign: Select this option if you want to restrict attempts on a contact based on the previous contact attempts from the current campaign only. If Organization is disabled, the following options are displayed: • Current Campaign: Select this option if you want to restrict attempts on a contact based on the previous contact attempts from the current campaign only. • All Campaigns: Select this option if you want to restrict attempts on a contact based on the previous contact attempts from all campaigns.
Maximum Attempt	Specify the maximum number of attempts you want to allow in the given duration for a contact or address. Any attempt after the maximum number of attempts is reached is restricted. The minimum and maximum allowed values are 1 and 999, respectively.

Table continues...

Field Name	Description
Same Calendar Day	Enable this option if you want the rule to consider the attempts for the same calendar day. If you enable this option, the rule considers the time only till midnight of the contact's time zone, which is the time zone in the <Phone attribute name> Time Zone attribute. For example, consider you have configured a rule that allows maximum three attempts in 24 hours. If you enable the Same Calendar Day option and run the rule at 4:00 P.M., the rule engine counts attempts only till midnight. If the Same Calendar Day option is disabled, the rule engine counts the attempts from 4:00 P.M. of the previous day.
Duration (In Hours)	Select the duration (in hours) for which the maximum number of configured attempts are allowed. The duration is always relative to the number of hours prior to the current rule execution time. The minimum and maximum duration allowed for the number of configured attempts are 1 and 999 hours, respectively. For example, if the rule is to allow maximum of two attempts in the last 3 hours and the rule is run at 4:00 P.M., the rule engine counts all the attempts between 1:00 P.M. to 4:00 P.M. The Duration (In Hours) field is available only if you disable the Same Calendar Day option.
Previous Channel Type	Click the channel types for which you want to consider the maximum attempt count. You can select multiple channels to be counted. For example, if you configure a rule for maximum of two attempts in last 24 hours and select the Previous Channel Type as Voice, the rule engine counts all the voice call attempts <i>only</i>. If you select the Previous Channel Type as Voice and Email, the rule engine counts all attempts on both the channels cumulatively.

Table continues...

Field Name	Description
Exclude Completion Code In Attempt Count	Click the completion codes for which previous attempts should not be counted during the rule execution. For example, if you select Ring No Answer in the Exclude Completion Code In Attempt Count field, the previous attempts having completion code as RING_NO_ANSWER are not counted when calculating the number of attempts.
Restriction Completion Code	Click the completion code you want to assign to the contact when the contact is restricted by this rule.
Attempt Completion Code: The Attempt Completion Code area is displayed if you select Attempt Completion Code in the Rule Category field.	

Table continues...

Field Name	Description
Attempt From	Use to specify whether you want the rule engine to count the attempts from currently running campaign, all running campaigns of the current organization, or all running campaigns of all organizations. The options that are displayed depend on whether Organization is enabled in Avaya Experience Portal. If Organization is enabled, the following options are displayed: • All Organizations: Select this option if you want to restrict attempts on a contact based on the previous contact attempts from all campaigns of all organizations. • Current Organization: Select this option if you want to restrict attempts on a contact based on the previous contact attempts from all campaigns of the current organization. • Current Campaign: Select this option if you want to restrict attempts on a contact based on the previous contact attempts from the current campaign only. If Organization is disabled, the following options are displayed: • Current Campaign: Select this option if you want to restrict attempts on a contact based on the previous contact attempts from the current campaign only. • All Campaigns: Select this option if you want to restrict attempts on a contact based on the previous contact attempts from all campaigns.
Attempt Completion Code	Click the attempt completion code for which you want to restrict the attempt. For example, if a contact received a Disconnected By User CCA completion code in last 24 hours, restrict that attempt. You can select one or more completion codes for a rule. If you select multiple completion codes for a rule, the rule checks for attempts that have a result matching the selected completion codes.

Table continues...

Field Name	Description
Same Calendar Day	Enable this option if you want the rule to consider the attempts for the same calendar day. If you enable this option, the rule considers the time only till midnight of the contact's time zone, which is the time zone in the <Phone attribute name> Time Zone attribute. For example, consider you have configured a rule that allows maximum three attempts in 24 hours. If you enable the Same Calendar Day option and run the rule at 4:00 P.M., the rule engine counts attempts only till midnight. If the Same Calendar Day option is disabled, the rule engine counts the attempts from 4:00 P.M. of the previous day.
Duration (In Hours)	Select the duration (in hours) in which only one attempt for the configured completion code is allowed. The duration is relative to the number of hours prior to current rule execution time. For example, consider you have configured a rule to restrict an attempt on a contact with Disconnected By User CCA completion code in the last 3 hours. If the rule is run at 4:00 P.M., the rule engine checks if there is an attempt for a contact having completion code as Disconnected By User CCA between 1:00 P.M. to 4:00 P.M. If the rule engine finds such an attempt, it restricts further attempts to that contact or address as per the rule configuration. The Duration (In Hours) field is available only if you disable the Same Calendar Day option.
Restriction Completion Code	Click the completion code you want to assign to the contact when the contact is restricted by this rule.
Nuisance Frequency: The Nuisance Frequency area is displayed if you select Nuisance Frequency in the Rule Category field.	

Table continues...

Field Name	Description
Attempt From	Use to specify whether you want the rule engine to count the attempts from currently running campaign, all running campaigns of the current organization, or all running campaigns of all organizations. The options that are displayed depend on whether Organization is enabled in Avaya Experience Portal. If Organization is enabled, the following options are displayed: • All Organizations: Select this option if you want to restrict attempts on a contact based on the previous contact attempts from all campaigns of all organizations. • Current Organization: Select this option if you want to restrict attempts on a contact based on the previous contact attempts from all campaigns of the current organization. • Current Campaign: Select this option if you want to restrict attempts on a contact based on the previous contact attempts from the current campaign only. If Organization is disabled, the following options are displayed: • Current Campaign: Select this option if you want to restrict attempts on a contact based on the previous contact attempts from the current campaign only. • All Campaigns: Select this option if you want to restrict attempts on a contact based on the previous contact attempts from all campaigns.
Number of Nuisance Call	Select the maximum number of nuisance calls you want to allow in the specified duration.

Table continues...

Field Name	Description
Same Calendar Day	Enable this option if you want the rule to consider the attempts for the same calendar day. If you enable this option, the rule considers the time only till midnight of the contact's time zone, which is the time zone in the <Phone attribute name> Time Zone attribute. For example, consider you have configured a rule that allows maximum three attempts in 24 hours. If you enable the Same Calendar Day option and run the rule at 4:00 P.M., the rule engine counts attempts only till midnight. If the Same Calendar Day option is disabled, the rule engine counts the attempts from 4:00 P.M. of the previous day.
Duration (In Hours)	Select the duration (in hours) during which the configured number of nuisance calls are allowed. For example, you can configure a rule to restrict attempts to a contact after five nuisance calls are detected to that contact in the last 24 hours. The minimum and maximum allowed values are 1 and 999 hours, respectively.
Consider All Phone Address As Nuisance	Enable this option to restrict the associated address. When you enable this option, all contacts containing the common addresses from the restricted contacts also get restricted. For more information, see the 72Hours Nuisance rule section in <i>Avaya Proactive Outreach Manager Overview and Specification</i>.
Restriction Completion Code	Click the completion code you want to assign to the contact, when the contact is restricted by this rule.
Custom: The Custom area is displayed if you select Custom in the Rule Category field.	

Table continues...

Field Name	Description
Class Name	Specify a fully qualified Java class name, such as “com.avaya.pim.api.PomCustomRule.TestCustomRule”, for custom implementation of the rule. The rule engine invokes this class during execution of the rule. A custom class implements the interfaces provided by POM. Class name cannot contain the following special characters: ^, ~, ` , !, ' , ; , #, \$, < , > The time taken by POM to respond after evaluating a custom rule affects the number of attempts made in a given time slot, which in turn results in lower agent utilization. When implementing a custom rule, POM does not evaluate the defined rule in the following cases: • If POM does not find the specified custom Java class. • If POM finds that an exception occurred when processing the custom Java class. As a result, POM restricts attempts to dial the contact.  Note: If POM uses more than five to seven seconds to run the custom rule, POM identifies the call as a nuisance call. For more information about custom class, see <i>Developer Guide for Proactive Outreach Manager</i>.
Custom Key Value Pair	Specify the parameters for the custom class in the form of a key-value pair. In the Custom Key and Custom Value fields, specify a key-value pair. Click  to delete the key-value pair.
Add Custom Key Pair	To add another key-value pair. You can add multiple key-value pairs at a time.
Restriction Completion Code	Click the completion code you want to assign to the contact when the contact is restricted by this rule. If the custom class overrides the completion code, the restricted attempt is assigned the new completion code. Otherwise, the restricted attempt is assigned the completion code that you specify in the Restriction Completion Code field.

Table continues...

Field Name	Description
Attribute and System Restrictions: The Attribute and System Restrictions area is displayed if you select Attribute and System Restrictions in the Rule Category field.	
ID	Displays the name of the existing ID of the migrated campaign restriction. You cannot edit this field. This field is displayed only for migrated campaign restriction rules. For more information about campaign restriction migration, see Campaign restriction migration on page 299.
Description	Type a description for the Attribute and System Restriction.
Restriction Type	Click the restriction type. The following are the options: • Permanent Restriction: When you select this restriction type, POM does not redial the contact from the running campaign. POM marks the contact with Restricted Other completion code. • Temporary Restriction: When you select this restriction type, POM temporarily restricts attempts to dial the contact for the duration that is set in the Re-check Interval (Min) field. After the interval elapses, POM attempts to dial the contact. For the Attribute and System Restrictions rule category, <code>Restricted other</code> and <code>Restricted DNC</code> completion codes are available. If you select the DNC attribute in the Restriction Details option, POM applies the <code>Restricted DNC</code> completion code if the contact is restricted. Otherwise, POM applies the <code>Restricted Other</code> completion code. POM marks these completion codes only when the restriction type is permanent.

Table continues...

Field Name	Description
Re-check Interval (Min)	Specify the duration (in minutes) after which POM must attempt to redial a temporarily restricted contact. This field is available only if you select Temporary Restriction in the Restriction Type field. The minimum and maximum allowed values are 1 and 259200 minutes, respectively.
Custom Restriction	Enable this option to view the Custom Restriction Details area.
Restriction Details: The Restriction Details area is displayed only if you select Attribute and System Restrictions in the Rule Category field, and disable the Custom Restriction option in the Attribute and System Restrictions area.	
Add Condition	Click to define a condition that you want to apply in the Attribute and System Restrictions rule. For defining the condition, select the logical operators, contact attributes, common names, and system values. For more information, see Attributes used in Attribute and System Restrictions on page 295, Data types and operators used for Attribute and System Restrictions on page 298 and Supported formats of day, date, and time for databases in Attribute and System Restrictions on page 289.
Add Group	Click to create a group in which you want to define one or more conditions, or create one or more groups.
Remove Group	Click to delete a group.
Delete 	Click to delete a condition.
Remove Conditions	Click to delete all defined conditions and groups.
Custom Restriction Details: The Custom Restriction Details area is displayed only if you select Attribute and System Restrictions in the Rule Category field, and enable the Custom Restriction option in the Attribute and System Restrictions area.	

Table continues...

Field Name	Description
Custom Class	Specify a fully qualified Java class that is available on all POM servers in the system. The rule engine in POM invokes this class during the implementation of the defined rule. The class implements the interfaces provided by POM. When implementing Attribute and System Restrictions, POM does not evaluate the defined rule in the following cases: • If POM does not find the specified custom Java class. • If POM finds that an exception occurred when processing the custom Java class. As a result, POM restricts attempts to dial the contact. For more information, see <i>Developer Guide for Proactive Outreach Manager</i>.

Common name for phone attributes

Common name is the common representation for any phone type of sub-attribute. With common name, you can configure the rule for those common attributes. During rule evaluation, the rule is evaluated against the phone number which is getting dialed.

For example, if you create HomePhone as Phone type of attribute, POM automatically creates the following attributes:

- HomePhone
- HomePhone_ctry_code
- HomePhone_tz
- HomePhone_state
- HomePhone_wireless
- HomePhone_allowedtime
- HomePhone_disallowedtime

These attributes are referred to all phone type of attributes and other attributes related to it, as listed below:

- Phone: Phone number dialed for the contact.
- State: The state associated with the dialed phone number.
- Timezone: The time zone associated with the dialed phone number.
- Wireless: Indicates whether the dialed phone number is a wireless phone.
- CountryCode: The country code associated with the dialed phone number.

- AllowedTime: The hours and days of the week during which the phone number can be dialed.
- DisallowedTime: The hours and days of the week during which the phone number cannot be dialed.

*** Note:**

State, Wireless, AllowedTime, and DisallowedTime are applicable only when the Advanced Guard Time feature is enabled in Global Configuration.

A given contact list can have multiple phone type of attributes. If you configure a condition based on the attributes listed in the common names, POM applies it to whichever phone is being used for dialing the contact and to all its related attributes.

For example, to restrict calls to all contacts where the country code of the dialed number is 1, state of the dialed number is CA, and the dialed number is a wireless phone:

- Create a group with the AND operator.
- Under the group, add a condition for the CountryCode common name attribute by using the equal to (=) operator and mention the value as 1.
- Add a second condition for the State common name attribute by using the equal to (=) operator and mention the value as CA.
- Add a third condition for the Wireless common name attribute by using the equal to (=) operator and mention the value as YES.

Now you can restrict calls to all contacts where the country code of the dialed contact is 1, state is CA, and Wireless is YES, irrespective of the phone attribute being used for dialing the contact.

Supported formats of day, date, and time for databases in Attribute and System Restrictions

Data type	Supported Formats
Day	Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday

Table continues...

Data type	Supported Formats
Date	• MM • DD • YY • MMDD • YYYY • MMDDYY • MMDDYYYY • MMY • MMYYYY • dd-MM-yyyy • MM-dd-yyyy • yyyy-dd-MM • yyyy-MM-dd • dd.MM.yyyy • MM.dd.yyyy • yyyy.dd.MM • yyyy.MM.dd • dd/MM/yyyy • MM/dd/yyyy • yyyy/dd/MM • yyyy/MM/dd
Time	• HH24 • MI • SS • HH24MI • MISS • HH24SS • HH24MISS • HH:mm:ss

Table continues...

Data type	Supported Formats
Timestamp	• HH24 • MI • SS • HH24MI • MISS • HH24SS • HH24MISS • HH:mm:ss • MM • DD • YY • MMDD • YYYY • MMDDYY • MMDDYYYY • MMY • MMYYYY • dd-MM-yyyy HH:mm:ss • MM-dd-yyyy HH:mm:ss • yyyy-dd-MM HH:mm:ss • yyyy-MM-dd HH:mm:ss • dd.MM.yyyy HH:mm:ss • MM.dd.yyyy HH:mm:ss • yyyy.dd.MM HH:mm:ss • yyyy.MM.dd HH:mm:ss • dd/MM/yyyy HH:mm:ss • MM/dd/yyyy HH:mm:ss • yyyy/dd/MM HH:mm:ss • yyyy/MM/dd HH:mm:ss

Based on the configured groups and conditions, POM restricts a contact from being dialed during a campaign.

Support for special keywords in Rule query editor

In the Rule query editor, when defining the rule conditions, you can use the special keywords `$NOW` and `$TODAY` for the following data types:

Data type	Keyword	Keyword
DATE	<code>\$TODAY</code>	-
TIME	-	<code>\$NOW</code>
TIMESTAMP	<code>\$TODAY</code>	<code>\$NOW</code>

Important:

`$NOW` and `$TODAY` are case-sensitive. Use `$NOW` or `$TODAY` with a numeric value.

\$NOW

When defining a rule, in a condition that uses an attribute of the `TIME` or `TIMESTAMP` data type, you can use `$NOW` in the value field.

During rule evaluation, POM replaces `$NOW` with the current `TIME` or `TIMESTAMP` of the POM server.

POM compares this `TIME` or `TIMESTAMP` with the attribute value of the contact.

Warning:

You cannot use `$NOW` for System values (time).

You can use `$NOW+1`, `$NOW-1`, where 1 represents the number of hours to add or subtract from the current time.

- If the data type is of `TIME` type, POM evaluates `$NOW` as the current time.
- If the data type is of `TIMESTAMP` type, POM evaluates `$NOW` as the current date and time.

Example on using `$NOW`

Furniture delivery schedule reminder

ABC works, a furniture delivery company, wants to notify its customers about the furniture delivery schedule. The company provides the time value and they expect POM to call the customers three hours ahead of the time value the company provides.

For example, if a delivery is scheduled for 3:00 P.M. on Friday, May 25, 2012, the company expects POM to call the customer at 12:00 noon or as close to 12:00 noon as possible. The company also wants to follow certain time restrictions for making such calls. All calls must be made between 9:00 A.M. and 6:00 P.M. If the delivery is scheduled for 9:00 A.M., POM cannot make the call at 6:00 A.M.

Campaign Strategy: *StrategyFurniture

- ▼ Campaign Strategy
 - ▼ Notification Text
 - Text Item
 - ▼ Handler (initial)
 - ▼ Call between 9am to 6pm
 - ▼ Restrictions
 - Delivery Time Restrictions

Property	Value
Name	Call between 9am to 6pm
Description	
Sender's Display Name	
Sender's Address	
Timeout (sec)	
Guard Times	Disable
Min Contact Time	9:00:00
Max Contact Time	18:00:00

As POM can make calls only between 9:00 A.M. and 6:00 P.M., set it as the **Min Contact Time** and **Max Contact Time** in the Call node of the campaign strategy.

! Important:

Use \$NOW to specify the current time or timestamp. You can use \$NOW with attributes of `time` or `timestamp` data type. For this example, use the `time` data type. The `sch_time` attribute is of the `time` data type and stores the delivery time of each record.

You can use offsets with \$NOW to increment or decrement the value with respect to \$NOW. For example, \$NOW+3 when compared with the `time` or `timestamp` data type, represents current time + 3 hours. Similarly, \$NOW+72 when compared with current time represents current time+72 hours.

Applying restrictions for the furniture delivery schedule example

You can handle two schedules for the furniture delivery schedule:

- Schedules that are more than three hours away
- Elapsed schedules

Assume that current time is 12:00 hours, that is, \$NOW=12:00 hours

Restriction 1

The Calling window shifts with \$NOW values, that is, if \$NOW=12:00 P.M., POM does not place a call for a delivery scheduled at 4:00 P.M. because the calling window is only three hours. POM places a call to the same contact after 1:00 P.M. You must mark such records as temporary restricted.

Call customers only in the three-hour window prior to delivery schedule.

Attribute and System Restrictions

Description
Call customers only in the three h

Restriction Type
Temporary Restriction

Re-check Interval(Min)
15

Custom Restriction
☐

Restriction Details

AND
Add Condition
Add Group
Remove Group

sch_time
>
\$NOW+3
Remove

Remove Conditions

Restrict all schedules which are greater than \$NOW+3 or POM must not call until 12:00 hours. For this restriction, set the **Restriction Type** in the rule as `Temporary Restriction`. POM marks such record as temporary restricted and retries after every 15 minutes to check if the restriction is still valid for the record. After the restriction condition becomes invalid for the record, POM places a call to the contact record.

Restriction 2

All the records whose delivery time is elapsed must not be called during the campaign.

Call customers only before the delivery schedule.

Attribute and System Restrictions

Description
Call customers only before the deli

Restriction Type
Permanent Restriction

Custom Restriction
☐

Restriction Details

AND
Add Condition
Add Group
Remove Group

sch_time
<
\$NOW
Remove

Remove Conditions

Restrict all schedules which are less than \$NOW or POM must not call beyond three hours.

For this restriction, set the **Restriction Type** in the rule as `Permanent Restriction`. POM marks the record with the Restricted Other completion code and does not retry this record.

\$TODAY

When defining a rule, in a condition that uses an attribute of the `DATE` or `TIMESTAMP` data type, you can use `$TODAY` in the value field.

During rule evaluation, POM replaces `$TODAY` with the current `DATE` or `TIMESTAMP` of the POM server.

POM compares this `DATE` or `TIMESTAMP` with the attribute value of the contact.

Warning:

You cannot use `$TODAY` for System values (date).

Examples of the usage of \$TODAY

Example 1

You can use `$TODAY+1` or `$TODAY-1`, where 1 represents the number of days to add or subtract from the current date.

If the data type is of the `DATE` type, POM does the following actions:

- POM evaluates `$TODAY` as the current date.
- POM evaluates `$TODAY+1` as one day after the current date.
- POM evaluates `$TODAY-1` as one day before the current date.

Example 2

You can use `$TODAY+x`, `$TODAY-x`, where x represents the number of days to add or subtract from the current date.

If the data type is of the `DATE` or the `TIMESTAMP` type, POM does the following actions:

- POM evaluates `$TODAY` as the current date.
- POM evaluates `$TODAY+x` as the number of days after the current date.
- POM evaluates `$TODAY-x` as the number of days before the current date.

Attributes used in Attribute and System Restrictions

Contact attribute

Contact attributes are properties of the contact data in POM.

Contact attributes consist of all pre-defined (system) and user-defined (custom) attributes configured in POM.

Examples of defining conditions by using contact attribute

Example 1:

To enable POM to restrict calls to platinum card holders, except the ones for whom the amount due is more than 50000, do the following:

- Create a group with the **AND** operator.
- Under the group, add a condition for the contact attribute.
- In the condition, use the Equal To operator and mention the value as Platinum.
- Add a second condition for the contact attribute that saves the amount due.
- In the condition, use the greater than operator and mention the value as 50000.

POM can now call all contacts with due amount of more than 50000, even if the card holders are platinum card holders.

Common names for phone attributes

The following are the phone type of attributes and their related attributes:

Attribute	Description
Phone	The phone number dialed for the contact.
State	The state associated with the dialed phone number.
Timezone	The time zone associated with the dialed phone number.
Wireless	Indicates whether the dialed phone number is a wireless phone.
CountryCode	The country code associated with the dialed phone number.
Allowed Time	The hours and days of the week during which the phone number can be dialed.
Disallowed Time	The hours and days of the week during which the phone number cannot be dialed.

When you create an attribute of type **PHONE**, POM automatically creates a set of related attributes.

For example, `MyPhone`, `MyPhone_ctry_code`, `MyPhone_tz`, `MyPhone_state`, `MyPhone_wireless`, `MyPhone_allowedtime`, and `MyPhone_disallowedtime`.

A contact list can contain multiple **PHONE** type of attributes.

If you provide a value when configuring a condition based on the attributes in Common Names, POM compares the value against the attribute of the phone.

After comparing, if both values match, POM stops dialing the contact.

Examples of defining conditions by using Common Names

Example 1:

To restrict all calls being made using phone numbers 2121245021 and 2121245022:

- Create a group with the **OR** operator.
- Under the group, add a condition for the Phone common name attribute using the Equal To operator and mention the value as 2121245021.

- Add a second condition for the Phone common name attribute using the Equal To operator and mention the value as 2121245022.

POM can now restrict calls to all contacts where 2121245021 or 2121245022 are being dialed irrespective of any PHONE type of attribute being used for dialing the contact.

Example 2:

To restrict calls to all contacts where the country code of the dialed number is 1, state of the dialed number is CA, and the dialed number is a wireless phone:

- Create a group with the AND operator.
- Under the group add a condition for the common name attribute CountryCode using the Equal To operator and mention the value as 1.
- Add a second condition for the common name attribute State using the Equal To operator and mention the value as CA.
- Add a third condition for the common name attribute Wireless using the Equal To operator and mention the value as YES.

 Note:

State and Wireless are available only when the Advanced Guard Time feature is enabled in Global Configuration.

POM can now restrict calls to all contacts where the country code of the dialed contact is 1, state is CA, and Wireless is YES irrespective of any PHONE type of attribute being used for dialing the contact.

System values

These attributes are the properties of the system where POM is installed. The values provided in conditions based on these attributes are compared to the system current day/date/time.

- `Day` (name of the day in the week on the system)
- `Date` (current date of the system)
- `Time` (current time of the system)
- `Dnc`

POM performs a check on the common DNC list and organization-specific DNC list, but not on the custom DNC list.

When checking, POM verifies whether the dialed phone number is in the DNC list. If the number is in the list, POM restricts the attempt to dial the number.

 Note:

The system day/date/time are compared to the current day/date/time of the dialed phone numbers based on the time zone attribute configured for the dialed phone numbers.

Examples of defining conditions by using system values

Example 1:

To restrict calls to all contacts on Sunday or on July 4:

- Create a group with the OR operator.

- Under the group, add a condition for the Day system value attribute using the Equal To operator and mention the value as Sunday.
- Add a second condition for the Date system value attribute using the Equal To operator and mention the value in MMDD format, that is, 0704.

POM can now restrict calls to all contacts where the current Day of the phone being dialed is Sunday or Date is July 4.

Example 2:

To restrict calls to all contacts by using DNC:

- Create a condition with the AND operator.
- In the condition, select the system value as Dnc.

POM can now restrict calls to contacts that are in the DNC list.

Data types and operators used for Attribute and System Restrictions

When using the Query condition editor in POM, you can use the data types that are supported by the available contact attributes.

For each data type, you can use various operators.

Data type	Operator													
	=	!=	>=	<=	>	<	in	not in	between	not between	isNull	is not null	like	not like
INTEGER														
LONG														
SHORT														
CHARACTER														
FLOAT														
BOOLEAN														
STRING														

Table continues...

Data type	Operator													
PHONE	=	!=					in	not in			isNull	is not null	like	not like
EMAIL	=	!=					in	not in			isNull	is not null	like	not like
DATE	=	!=	>=	<=	>	<			between	not between	isNull	is not null		
TIME	=	!=	>=	<=	>	<			between	not between	isNull	is not null		
TIMESTAMP	=	!=	>=	<=	>	<			between	not between	isNull	is not null		

SYSTEM VALUE

DAY	=	!=					in	not in	between	not between
DATE	=	!=	>=	<=	>	<			between	not between
TIME	=	!=	>=	<=	>	<			between	not between
DNC										

Campaign restriction migration

With the campaign migration feature, the existing restrictions created using the campaign restriction Flex editor are migrated to the Rule engine.

This migration happens by running the script available in the `$POM_HOME/bin` folder.

The script parses the existing campaign restriction present in the POM database and creates a separate Attribute and System Restrictions rule for each Restriction node and saves it as a new rule in the `pim_rule` table.

The `migrate_campaign_restriction_to_rule.sh` script is triggered during the POM migration.

All the migrated Attribute and System Restrictions rules are available at the top in the global default order list. This implies that the migrated rules are run first than any other created rule.

After moving campaign restriction to the rule engine, the rule evaluation sequence is as follows:

1. Holiday is evaluated.
2. Global rules are evaluated based on the order configured.
3. Campaign-level rules are evaluated.

The following table describes the data used for different fields in the Rule editor. This data is optimized from the existing restriction.

Field	Campaign Restriction
Name	Name of the restriction node_ID. Where name of the restriction node is the existing name that is mentioned in the restriction in campaign restriction. The value of the ID is similar to the ID provided in the restriction node. If name of the restriction node is not provided, verify if the name for the restriction parent is present. If it is present, use the name as parent restrictions node_ID. If no name is provided, use the Migrated_Rule_ID.
All Organizations	The existing restrictions are applicable for all organization campaigns. Hence, the All Organizations option is enabled.
Rule Category	Attribute and System Restrictions
Apply To	All Campaigns
Restriction On	Not applicable
Activate Rule	Enabled
Channel type	Existing Attribute and System Restrictions are applicable for all channels. Hence, all channels are selected.
Exclude if current attempt type	No option selected.
ID	ID of the existing restriction node. This field is read-only and is displayed only for migrated rules.
Description	Description of the restriction node is derived from the existing restriction.
Restriction Type	Restriction type selected in the restriction node is derived from the existing restriction.
Custom Restriction	For custom restriction node present in an existing restriction, this option is enabled.  Note: If there is a custom restriction node which has an exception configured, then such exception is not migrated and you need to include that exception in the custom class.
Custom Class	If there is custom restriction node in the existing campaign restriction, migration script copies the custom class name to the Custom Class parameter of the rule.

Table continues...

Restriction Details	Existing restriction has the restriction based on the system or contact type. Migration script forms the restriction query based on the restriction provided in the campaign restriction node.  Note: Existing campaign restriction supports \$NOW for the Date type of data type. Where, \$NOW+1 works as current day + one day. Migration script changes the \$NOW keyword to \$TODAY, but the functionality remains unchanged. The following table displays the mapping of the existing operator to the new rules restriction details operator: <table border="1"> <thead> <tr> <th>Existing operator</th><th>Rule operator</th></tr> </thead> <tbody> <tr> <td>contains</td><td>like (%value%) % is added pre and post of the condition value</td></tr> <tr> <td>Only Min value</td><td>></td></tr> <tr> <td>Only Max value</td><td><</td></tr> <tr> <td>Min and Max value where Min is less than Max value</td><td>between</td></tr> <tr> <td>Min and Max value where Min is greater than Max value</td><td>not between</td></tr> <tr> <td>equals</td><td>=</td></tr> <tr> <td>not equals</td><td>!=</td></tr> <tr> <td>is null</td><td>is null</td></tr> <tr> <td>is not null</td><td>is not null</td></tr> </tbody> </table> In the existing campaign restriction, a user can provide an exception for the restriction. So, as part of the migration the exception is added to the restriction query as an additional condition (opposite) with the AND operator. For example, an existing Restriction has the following restriction condition: Restrict customer whose payment due is < 10000. Exception to this restriction is that if Credit score is < 400 (do not restrict). Migration script converts this restriction and its exception to Query In Attribute and System Restrictions Rule, payment due < 10000 and Credit score >= 400 Restrict all contact which have payment due less than 10000 and Credit score more than or equal to 400.	Existing operator	Rule operator	contains	like (%value%) % is added pre and post of the condition value	Only Min value	>	Only Max value	<	Min and Max value where Min is less than Max value	between	Min and Max value where Min is greater than Max value	not between	equals	=	not equals	!=	is null	is null	is not null	is not null
Existing operator	Rule operator																				
contains	like (%value%) % is added pre and post of the condition value																				
Only Min value	>																				
Only Max value	<																				
Min and Max value where Min is less than Max value	between																				
Min and Max value where Min is greater than Max value	not between																				
equals	=																				
not equals	!=																				
is null	is null																				
is not null	is not null																				

Rules page field descriptions

The Rules page displays the list of rules associated with the organization or owned by the user organization.

By default, POM provides two system rules: 72Hours_NUISANCE and 24Hours_AMD.

For more information about the system rules, see *Avaya Proactive Outreach Manager Overview and Specification*.

Field or Button	Description
New Rule	Click to add a new rule.
Global Rule Default Order	Click to specify the order of execution of global rules.
Search Rules	Use to search a rule.
Filter 	Click to perform advanced search on the rules.
Column Name	Click the column name based on which you want to perform the advanced search. The following are the options: • Name: To filter the rule by name. • Category: To filter the rule based on the rule category.
Operator	Click the operator you want to use to perform the advanced search. If you select Name in the Column Name field, the following operators are available: • Equal to (=) • Not Equal to (!=) • in • like • not like If you select Category in the Column Name field, the following operator is available: • Equal to (=)
Search Text	If you select Name in the Column Name field, type the rule name based on which you want to filter the rules. If you select Category in the Column Name field, click the rule category based on which you want to filter the rules.
Refresh 	Click to clear the search.
Columns 	Click Columns  > Columns > <i><name of column></i> to show or hide a column name on the Rules page.

Name	Description
Actions 	Displays the actions you can take on the rule. The following are the options: • Edit: To edit the rule. • Save As: To create a copy of the rule. The name and organization attributes are changed in the new rule that is created. • Associated Campaigns: To view the campaigns associated with the rule. • Delete: To delete the rule. For system rules, only the Edit and Save As options are available.
Name	Displays the unique name of the rule.
Type	Displays whether the rule is a system rule or user-defined rule.
Level	Displays whether the rule is applied to all or specific campaigns.
Restrict On	Displays whether the rule restricts an attempt on Contact or Address.
Category	Displays the rule category.
Restriction Completion Code	Displays the completion code with which the contact is updated when the contact is restricted by the rule.
Enabled	Displays whether the rule is enabled or disabled.

Setting the default order for applying global rules

About this task

You can set the default order in which the global rules are applied in POM.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Rules**.
3. On the Rules page, click **Global Rule Default Order**.
4. On the Global Rule Default Order page, specify the relevant details.
5. Click **Save**.

Global Rule Default Order page field descriptions

The page displays the default order in which the global rules are applied in POM.

The global rule default order is specific to an organization. The **Organization** field is displayed if the user is logged in as a default user. If the organization user is logged in, the user can see the rules specific to the organization.

Name	Description
Organization	Displays the list of all the organizations. This field is available if the user is logged in as a default user. For default organization user, if there are changes in the order and a different organization is selected from the organization field without saving, a warning message is displayed.
Rule Name	Displays the global rules. Drag the rules up or down in the hierarchy as per the order you want to set.

Button	Description
Save	Click to save the changes made to the order of the global rules.
Cancel	Click to cancel the changes made to the order of the global rules.

Viewing the campaigns associated with a rule

About this task

Use this procedure to view the campaigns that are associated with a rule.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Rules**.
3. On the Rules page, click the Actions icon  corresponding to the rule and click **Associated Campaigns**.

Result

The campaigns associated with the rule are displayed on the Campaign Associated with Rule page.

Campaigns Associated with Rule page field descriptions

Name	Description
Campaign Name	Displays the name of the campaign associated with the rule.
Zone Name (Comma separated list)	Displays the zones within the campaigns for which the rule is associated.

Editing a rule

About this task

You cannot edit the **Name**, **Rule Category**, and **Apply To** fields of a custom rule.

You cannot edit the system rules. However, you can enable or disable the system rules.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Rules**.
3. On the Rules page, click the Actions icon  corresponding to the rule and click **Edit**.
4. On the *<rule name>* page, do the relevant modifications.
5. Click **Save**.

Creating a copy of a rule

About this task

Use this procedure to create a copy of an existing rule.

You must specify a name for the new rule.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Rules**.
3. On the Rules page, click the Actions icon  corresponding to the rule and click **Save As**.
4. On the *<rule name>* page, in the **New Name** field, type a name for the new rule and add the relevant details.
5. Click **Save**.

Deleting a rule

About this task

You cannot delete system rules.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Rules**.
3. On the Rules page, click the Actions icon  corresponding to the rule and click **Delete**.
4. On the confirmation message, click **Delete**.

Callback manager

Overview

Use the Callback Manager page to view and modify the created callbacks. You can use the Callback Manager page to perform the following operations on the callback records:

- Edit a single callback.
- Bulk edit callbacks to reassign callbacks to other agents.
- Cancel callbacks.
- Delete a callback.

While editing a callback, the operations allowed depend on the current state and type of the callback.

Viewing callbacks

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Callback Manager**.
The Callback Manager page shows the list of callbacks.
3. To view the details of a callback, click **Details**  corresponding to the callback.
The callback details are displayed on the Details for Callback <ID> page.

Callback Manager page field descriptions

The Callback Manager page displays the list of callbacks.
Depending on your role, you can search, sort, edit, terminate, and delete a callback.

Field or Button	Description
Bulk Edit	Click to edit the Agent ID of multiple callback records that you select. Bulk edit is applicable only for the Preferred Agent and Strict Agent types of callback.

Table continues...

Field or Button	Description
Terminate	Click to terminate the selected callbacks. You can select multiple callbacks at a time and terminate the callbacks. You can terminate the callbacks that are in one of the following states only: • Active Attached To Job • Waiting For Job Callback once terminated is not attempted again and its status is set to Manually Cancelled.
Delete	Click to permanently delete the selected callback record. You can delete multiple callbacks at a time. You can delete the callbacks which are in one of the following states only: • Expired • Completed • Overwritten • Manually Cancelled • Contact Excluded
Search Callback	Use to search a callback record using a campaign name.
Filter 	Click to perform advanced search. The following fields are displayed when you click Filter: • Column Name • Operator • Search Text

Table continues...

Field or Button	Description
Column Name	Select the column name based on which you want to filter the callback records. The following are the options: • - System Contact ID - Campaign Name - Type - State - Created For Agent - Created By - Next Attempt After - Start Time - End Time
Operator	Select the operator you want to use to perform the search. The following are the options: • Equal to (=) • Not Equal to (!=) • in • like • not like For more information about the supported logical operators for searching a callback, see Supported logical operators for searching callback records on page 311
Search Text	Specify the text based on which you want to search the callback record.
Refresh 	Click to clear the search.

Name	Description
Actions 	Displays the following options for the actions you can perform on the callback record: • Edit: To edit the callback. For more information, see Editing a callback on page 311. • Details: To view the details of the callback. For more information, see Viewing callbacks on page 306. • Terminate: To terminate the callback. For more information, see Terminating a callback on page 314. • Delete: To delete the callback. For more information, see Deleting a callback on page 314. The options that are available depend on the status of the callback in the campaign.
Callback ID	Displays the callback ID of the callback.
System Contact ID	Displays the system contact ID of the callback.
Campaign Name	Displays the name of the campaign for which the callback created.
Type	Displays the type of the callback. The following are the callback types: • Preferred Agent • Campaign • Standard • Strict Agent

Table continues...

Name	Description
State	Displays the state of the callback. The following are the callback states: • Active Attached To Job • Completed • Expired • Campaign Terminated • Overwritten • Contact Excluded • Waiting For Job • Manually Cancelled • Queued for Dialing • In Progress Callback state is marked as <code>Completed</code> in the following cases: • For an agent-based callback, after the agent attends the callback, the callback state is marked as <code>Completed</code>. • For a notification callback, when the notification call for the callback is launched, the callback state is marked as <code>Completed</code>. • For an SMS or email callback, when the SMS or email is sent, the callback state is marked as <code>Completed</code>.
Created By	Displays the ID of the agent who created the callback. If the callback is created by a web service, the Created By field displays the name of the user who executed the web service to create the callback.
Created for Agent	Displays the ID of the agent for whom the callback is created. The Created for Agent value is present for <code>Preferred Agent</code> and <code>Strict Agent</code> types of callbacks only.

Table continues...

Name	Description
Next Attempt After	Displays the next attempt time scheduled for the callback. Next attempt time is determined by the Pre interval time(min) and Retry time(min) global configuration parameters. The First attempt time is Pre-interval time (min). If the callback gets postponed, Next Attempt After value is set to: The time at which the callback is getting postponed + Retry time(min). Next attempt time is calculated as: Next Attempt time = Start time - Pre-interval time For example, if Start Time is set to 4:00 P.M., Pre-interval time is 2 minutes, and Retry time is 30 minutes, the first attempt, that is, Next Attempt starts at 3:58 P.M. If no agent is available at that time, retry is attempted after 30 minutes, that is, 4:28 P.M.
Start Time	Displays the start time of the scheduled callback according to the local time zone of the logged in user.
End Time	Displays the end time of the scheduled callback according to the local time zone of the logged in user. If the end time is dash (-), the callback does not expire.

Supported logical operators for searching callback records

The following table provides information about the logical operators you can use with each search attribute when searching callback records:

Search By	Description
Callback ID, System Contact ID	=, !=, >=, <=, <, >, in, between, not between, is null, is not null.
Campaign Name, Created For Agent, Created By	=, !=, in, contains, begins with, ends with, is null, is not null.
Type, State	=, !=, in, is null, is not null.
Next Attempt After, Start Time, End Time	=, !=, >=, <=, <, >, is null, is not null.

Editing a callback

About this task

You can edit the end time of a callback only if the callback is in any of the following states:

- Waiting for job
- Active attached to job

- Expired
- Contact Excluded
- Manually cancelled

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Callback Manager**.
3. On the Callback Manager page, **Edit Callback**  corresponding to the callback.
4. On the Edit Callback page, modify the information.
5. Click **Save**.

Edit Callback page field descriptions

You can edit the end time of a callback if the callback is in `Active Attached to Job`, `Expired`, `Contact Excluded`, `Waiting For Job`, or `Manually Cancelled` state.

The Edit Callback page displays the date format as per the locale time of the web browser.

Date format used by the system in a Callback Manager audit log and while creating or scheduling a callback is Year/month/day Hour:minute:second(YYYY/MM/dd HH:mm:ss).

Name	Description
Callback Type	Select the type of callback.
Agent ID	Select the Agent ID of the callback.
Start Time	Select the new start date and time for the callback. Select time in hh:mm:ss format.
Is Callback Never Expiring?	Specify whether the callback record expires after the specified end time. The following are the options: • Yes: Click to indicate that the callback record never expires. • No: Click to indicate that the callback record expires after the specified end time.
End Time	Select the new expiry date and time for the callback. Select time in hh:mm:ss format. The End Time field is unavailable if you select Yes in the Is Callback Never Expiring? field.

Table continues...

Name	Description
Next Attempt After	Select the date on which you want to make the next callback attempt. Select the time, in hh:mm:ss format, at which you want to make the next callback attempt. Next attempt time must be greater than the previous Next attempt after time and at least 5 minutes after the current system time.
TimeZone	Click the time zone for the callback record.
Save	Click to save the changes.

 Note:

If the callback is created by the agent, the Edit Callback page displays the timezone value as per the timezone of the web browser unless the user edits the value in the **TimeZone** field.

For example, if the timezone of the browser is Asia/Kolkata which is GMT+05:30, there is a single value for GMT+05:30 in the **TimeZone** dropdown list. So the **TimeZone** field will show the same timezone.

But if the timezone of the browser is Asia/Nairobi, which is GMT+03:00, there are multiple values for GMT+03:00 in the **TimeZone** dropdown list. So the **TimeZone** field will show the last timezone mapped to GMT+03:00.

If the callback is created by the agent, and if the timezone of the web browser runs on DST, the Edit Callback page displays the timezone value considering the DST changes unless the user edits the value in the **TimeZone** field.

For example, if the timezone of the browser is Europe/Athens which is usually GMT+02:00, however if Europe/Athens is currently on DST, the value of the timezone will change to GMT+03:00. So the **TimeZone** field will show a timezone with (+03:00) and not with (+02:00).

If the callback is created by the agent and on the Edit Callback page if the value of the **TimeZone** field is in GMT+x format (which is the browser timezone), then the value visible in the **TimeZone** field will be the last GMT+x value from the drop-down list.

Editing multiple callbacks

About this task

Use this procedure to change the Agent ID of multiple `Strict Agent` and `Preferred Agent` type of callbacks.

You can edit the `Strict Agent` and `Preferred Agent` type of callbacks only if the callbacks are in one of the following states:

- Active attached to job
- Waiting for job

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.

2. On the **Campaigns** menu, click **Callback Manager**.

The Callback Manager page shows the list of callbacks.

3. Select the callback records and click **Bulk Edit**.
4. On the **Bulk Edit Callback** page, in the **New Agent ID** field, type the appropriate agent ID.
5. Click **Save**.

Bulk Edit Callback page field descriptions

Name	Description
New Agent ID	The Agent ID of the agent to whom you want to assign the callbacks. The system displays the Bulk Edited Callbacks Summary. You can change the agent ID only for Preferred Agent and Strict Agent callback types.  Note: For Strict Agent type of callbacks, if Agent ID is changed, then Maximum Retry count for strict agent is recalculated.

Terminating a callback

About this task

You cannot delete a callback which is in an Active Attached To Job or Waiting For Job state. However, if you do not want to attempt a callback which is in an Active Attached To Job or Waiting For Job state, you can terminate the callback.

After you terminate a callback, its status changes to Manually Cancelled. You can then delete the callback.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Callback Manager**.
3. On the Callback Manager page, select one or more callbacks that you want to terminate and click **Terminate**.
4. On the confirmation message, click **Yes**.

Deleting a callback

About this task

You can delete callbacks that are in one of the following states only:

- Expired

- Completed
- Overwritten
- Manually Cancelled
- Contact Excluded

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Callback Manager**.
3. On the Callback Manager page, select one or more callbacks that you want to delete and click **Delete**.
4. On the confirmation message, click **Yes**.

Filter templates

Overview

You can create filter templates for campaigns or file splitters.

You can use a file splitter filter template to split a contact list based on the splitting criteria defined in the filter template. For more information about file splitters, see [Overview](#) on page 486.

You can use a campaign filter template to specify the filter and sort conditions for the contacts in the contact list that is associated with a campaign. POM filters the contacts in the contact list based on the filter conditions, and then sorts the filtered contacts based on the sort conditions configured in the filter template. POM uses these filtered and sorted contacts for the associated campaigns.

You can do the following in a filter template:

- Add, edit, and remove a filter.
- Add, edit, and delete filter conditions within a filter.
- Add, edit, and delete filter condition groups within a filter.
- Add, edit, and delete sort conditions in filter templates created for campaigns.
- Specify the top number of contacts that match the filter and sort conditions. POM uses these top matching contacts for the campaign.

You can add maximum 30 filter conditions and 5 sort conditions in a filter template.

Creating a filter template for campaigns or file splitters

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.

2. On the **Campaigns** menu, click **Filter Template**.
3. On the Filter Template page, click **New Filter Template**.
4. On the New Filter Template page, add the relevant information.
5. Click **Save**.

New / Edit Filter Template page field descriptions

Field	Description
Name	Type a name for the filter template. The maximum allowed length is 80 characters. Filter template name cannot contain the following special characters: ~, ` , !, @, #, \$, %, \, ^, &, (,), [,], ', ;, ,, ", <, >, ?, and space. After you create a filter template, you cannot edit its name.
Type	Click the type of filter template you want to create. The following are the options: • Campaign • Splitter
Filter Details	
Add Conditions	Click to add a filter condition. This button is displayed when no conditions are present in the filter template.
Operator	Select a logical operator for the filter conditions. The following are the options: • AND • OR The default logical operator is AND.
Add Condition	Click to add a filter condition in the filter.
Add Group	Click to add a group within the condition.
Remove Group	Click to remove a group from a condition.
Contact attribute	Click the contact attribute based on which you want to filter the contacts. For example, Last Name.

Table continues...

Field	Description
Operator	Click the operator you want to use with the contact attribute to filter the contacts. The operators that are available depend on the data type of the contact attribute you select. For more information about operators, see Filter template operators on page 319. For multi-character wild card support, use percentage (%). For single-character wild card support, use underscore (_). Multi-character and single-character wild cards are supported with the Like and NotLike operators. For example, if customer names in the contact list are Avaya, Avasa, and Asurian, and the search criteria is Ava_a, only two records, Avaya and Avasa, are displayed.
Value	Type the value of the contact attribute based on which you want to filter the contacts. POM displays the first 100 matching values. For example, if you filter records with last names containing Wa, POM displays the first 100 records with last names containing Wa. For information about the supported data types and operators for using \$NOW and \$TODAY in filter conditions, see Filter template operators on page 319.
Date and time format	Click the date and time format for the selected contact attribute. The drop-down list containing the date and time formats is displayed if you select specific contact attributes such as birth date and customer time. Specify the date and time formats for such contact attributes.
Delete 	Click to delete the filter condition.
Remove Conditions	Click to delete all filter conditions.
Sort Details The Sort Details area is displayed if you select Campaign in the Type field.	
Add	Click to add a sort condition.

Table continues...

Field	Description
Value	Click the contact attribute based on which you want to sort the contacts. For example, phone number. If the filter template is associated with the contact list of an attribute-based campaign, do not use the attributes that are already configured for attribute-based dialing on the Campaign Creation page of the campaign. POM, by default, sorts the filtered contacts based on the attribute-based dialing attributes.  Note: The Value drop-down does not display Phone attributes if you disable Allow Sorting By Phone Attribute on the Global Configuration page. The changes to the Allow Sorting By Phone Attribute check box does not impact an existing filter template that has phone attributes. For more information on this feature, see Global Configurations page field descriptions on page 567.
Sort Order	Click the sort order that you want to use to sort the contacts. The options are: • Ascending • Descending
Delete 	Click to delete the sort condition.
Other Details	
The Other Details area is displayed if you select Campaign in the Type field.	
Top number of records	Type the number of top contacts matching the filter and sort conditions to be used for the campaign. For example, if you specify the value as 100, POM uses the top 100 matching contacts for the campaign.
Save	Click to save the filter template.

Filter Template page field descriptions

Field or Button	Description
New Filter Template	Click to add a new filter template.
Search Filter Template	Use to search the filter templates.

Table continues...

Field or Button	Description
Filter 	Click to perform an advanced search on the filter templates.
Column Name	Click the column name based on which you want to perform the advanced search. The following are the options: • Name: To filter the filter templates by name. • Type: To filter the filter templates based on the filter template type.
Operator	Click the operator you want to use to perform the advanced search. If you select Name in the Column Name field, the following operators are available: • Equal to (=) • Not Equal to (!=) • in • like • not like If you select Type in the Column Name field, the following operators are available: • Equal to (=) • Not Equal to (!=)
Search Text	If you select Name in the Column Name field, type the filter template name based on which you want to filter the filter templates. If you select Type in the Column Name field, click the filter template type based on which you want to filter the filter templates.
Refresh 	Click to clear the search.

Name	Description
Actions 	The following are the options: • Edit: To edit the filter template. • Save As: To create a copy of the filter template. • Delete: To delete the filter template.
Name	Displays the name of the filter template.
Type	Displays the type of the filter template, that is, Campaign or Splitter.

Filter template operators

The following table provides the list of operators that are available in the filter templates. You can use these operators to build filter conditions in the filter templates. The operators that are available for a contact attribute depend on the data type of the contact attribute.

Attribute type	Allowed operators
Integer/Short/Long/Float	• = • != • >= • <= • < • > • in • not in • between • not between • isNull • is not null
String/Character/Email/Phone	• = • != • in • not in • like • not like • isNull • is not null
Boolean	• = • != • isNull • is not null

Based on the database configuration, the functioning of the *like* and *notlike* operators are case-sensitive for the inputs entered.

For example, if your database configuration is case-sensitive, string such as 'A%' matches with 'Abc' and not with 'abc'. If your database configuration is case-insensitive, then string such as 'A%' matches with both 'Abc' and 'abc'.

Contact attributes with null value are not selected when the *not in* operator is used.

Support for \$NOW and \$TODAY in filter template

\$TODAY is supported for date type of contact attributes and \$NOW is supported for timestamp type of contact attributes.

\$NOW and \$TODAY also support specifying offsets such as \$NOW plus (+) or minus (-) offset_value, and \$TODAY plus (+) or minus (-) offset_value.

For example, \$NOW+3 for a timestamp data type represents current time plus 3 hours. \$NOW-3 represents current time minus 3 hours. Similarly, \$TODAY+1 for a date data type represents current date plus 1 day.

Support for filtering based on wildcard characters (same as regular expression) for LIKE and NOT LIKE operators

Wildcard character-based filtering is available only for string type of attributes. You can use Java wildcard characters for filtering with file splitter type of filter template. For example, to search FirstName:

- Starting with character L, you can specify `^L` or `L.*`
- Containing "ra", you can specify `.*ra.*`
- With more than 6 characters, you can specify `.....*`
- Ending with 'n', you can specify `.*n$`

Date and time formats for databases in filter templates

The following table provides information about the date and time formats for the different supported databases in filter templates.

Note:

In formats that have date and time together, POM interprets HH as a 24-hour format. In formats that have only time mentioned in HH:mm, POM interprets HH as a 12-hour format.

Database	Date formats	Time and Timestamp formats
MSSQL	• MM • DD • YYYY • dd-MM-yyyy • MM-dd-yyyy • yyyy-dd-MM • yyyy-MM-dd • dd.MM.yyyy • MM.dd.yyyy • yyyy.dd.MM • yyyy.MM.dd • dd/MM/yyyy • MM/dd/yyyy • yyyy/dd/MM • yyyy/MM/dd	• HH24 • MI • SS • HH24MI • MISS • HH24SS • HH24MISS • HH:mm:ss • MM • DD • YY • MMDD • YYYY • MMDDYY • MMDDYYYY • MMY • MMYYYY • dd-MM-yy HH:mm:ss • MM-dd-yyyy HH:mm:ss • yyyy-dd-MM HH:mm:ss • yyyy-MM-dd HH:mm:ss • dd.MM.yyyy HH:mm:ss • MM.dd.yyyy HH:mm:ss • yyyy.dd.MM HH:mm:ss • yyyy.MM.dd HH:mm:ss • dd/MM/yyyy HH:mm:ss • MM/dd/yyyy HH:mm:ss • yyyy/dd/MM HH:mm:ss • yyyy/MM/dd HH:mm:ss

Table continues...

Database	Date formats	Time and Timestamp formats
Postgres	• MM • DD • MMDD • YYYY • MMDDYY • MMDDYYYY • MMY • MMYYY • dd-MM-yyyy • MM-dd-yyyy • yyyy-dd-MM • yyyy-MM-dd • dd.MM.yyyy • MM.dd.yyyy • yyyy.dd.MM • yyyy.MM.dd • dd/MM/yyyy • MM/dd/yyyy • yyyy/dd/MM • yyyy/MM/dd	• HH24 • MI • SS • HH24MI • MISS • HH24SS • HH24MISS • HH:mm:ss • MM • DD • YY • MMDD • YYYY • MMDDYY • MMDDYYYY • MMY • MMYYY • dd-MM-yy HH:mm:ss • MM-dd-yyyy HH:mm:ss • yyyy-dd-MM HH:mm:ss • yyyy-MM-dd HH:mm:ss • dd.MM.yyyy HH:mm:ss • MM.dd.yyyy HH:mm:ss • yyyy.dd.MM HH:mm:ss • yyyy.MM.dd HH:mm:ss • dd/MM/yyyy HH:mm:ss • MM/dd/yyyy HH:mm:ss • yyyy/dd/MM HH:mm:ss • yyyy/MM/dd HH:mm:ss

Table continues...

Database	Date formats	Time and Timestamp formats
Oracle	• MM • DD • YY • MMDD • YYYY • MMDDYY • MMDDYYYY • MMY • MMYYYY • dd-MM-yyyy • MM-dd-yyyy • yyyy-dd-MM • yyyy-MM-dd • dd.MM.yyyy • MM.dd.yyyy • yyyy.dd.MM • yyyy.MM.dd • dd/MM/yyyy • MM/dd/yyyy • yyyy/dd/MM • yyyy/MM/dd	• HH24 • MI • SS • HH24MI • MISS • HH24SS • HH24MISS • HH:mm:ss • MM • DD • YY • MMDD • YYYY • MMDDYY • MMDDYYYY • MMY • MMYYYY • dd-MM-yy HH:mm:ss • MM-dd-yyyy HH:mm:ss • yyyy-dd-MM HH:mm:ss • yyyy-MM-dd HH:mm:ss • dd.MM.yyyy HH:mm:ss • MM.dd.yyyy HH:mm:ss • yyyy.dd.MM HH:mm:ss • yyyy.MM.dd HH:mm:ss • dd/MM/yyyy HH:mm:ss • MM/dd/yyyy HH:mm:ss • yyyy/dd/MM HH:mm:ss • yyyy/MM/dd HH:mm:ss

Editing a filter template

About this task

You cannot edit the name of a filter template.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Filter Template**.
3. On the Filter Template page, click the Actions icon  corresponding to the filter template and click **Edit**.
4. On the *<filter template name>* page, modify the details.
5. Click **Save**.

Creating a copy of a filter template

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Filter Template**.
3. On the Filter Template page, click the Actions icon  corresponding to the filter template and click **Save As**.
4. On the Save As page, in the **New Name** field, type a name for the new filter template.
5. Click **Save**.

Deleting a filter template

About this task

You cannot delete a filter template that is associated with a campaign.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **Filter Template**.
3. On the Filter Template page, click the Actions icon  corresponding to the filter template and click **Delete**.
4. On the confirmation message, click **Delete**.

Filter template migration tool overview

The filter template migration tool migrates the current filter conditions from all campaigns to the filter templates. Use the migration tool only when the Advance Campaign List Management feature is enabled. The filter template migration tool can migrate filter templates with filter conditions such as all of below conditions, any of below conditions, and custom filter conditions.

Running the filter template migration tool

About this task

Use this procedure to run the filter template migration tool.

Procedure

1. Log on to the Proactive Outreach Manager server as a root user.
2. Run the following command on the Proactive Outreach Manager server to run the filter template migration tool:

```
$POMHOME/bin/migrate_Filters_To_FilterTemplates
```

Migrating the filter conditions from all campaigns to filter templates is a mandatory step for running the campaign.

Administrator can determine the status and exceptions of the campaign migration from the migration prompt.

Reports generation for filter template migration tool

Logs generated for the filter template migration are available at the `${PIM_HOME}/logs/PIM_FilterTmpMigr.log` location.

The reports contain details about the filter template migration. These reports are available at the `${PIM_HOME}/data/FTMigration` directory. The report name is generated with the current date and timestamp when the migration tool is run.

The filter template migration tool report contains the following details:

- Overall migration status of the campaigns. The status of migration can be either migrated, partially migrated, or not migrated.
- Reports also contain campaign-wise migration status along with message and details of filter conditions that are migrated.

Limitations of the filter template migration tool

The following are the limitations of the filter template migration tool:

- At the same group level with and, or conditions, the filter template migration tool cannot migrate filter conditions.
- Migration of filter template with and, or conditions at the same group level needs to be done manually.
- If filter conditions are more than 30 and sort conditions are more than 5, then after migration, the maximum filter conditions are 30 and maximum sort conditions are 5 only.

SIP Codes

Overview

This page displays information about SIP codes or events and their corresponding mappings with completion codes. You can configure POM to override the completion codes mapped to the sip codes.

Only an administrator user can access this page and can perform operations such as adding or modifying a mapping. A user with a SipCode Event Completion Code Mappings role can access this page but cannot add or modify a mapping.

You can use the page to perform the following operations:

1. Update the existing sip code mapping to use a different completion code.
2. Add a new mapping of sip code or event (which is not already present in the given list).
3. Delete any new mapping which is created by the user (which is not provided by default).

 Note:

1. To update the default mapping, you can only select a custom completion code, which is of type "SIP".
2. You cannot delete the default mapping provided out of the box, you can only delete any new mappings that are created by you.
3. The mappings are applicable system wide, for all organizations.

The SIP code page displays the following fields:

- Sipcode/Event
- Description
- Pom Completion Code
- User Completion Code

Example of how POM overrides the default SIP code to completion code mapping

If a customer does not answer the call and if POM receives `UA_TemporarilyUnavailable` (480), then by default POM disposes the record with the completion code `Ring_No_Answer`.

However, if you map the SIP code, `UA_TemporarilyUnavailable` (480) to a custom SIP type completion code, for example, `CC_temp_unavailable`, then upon receiving the SIP code `UA_TemporarilyUnavailable` (480), POM disposes the record with the completion code `CC_temp_unavailable` instead of `Ring_No_Answer`.

Related links

[Modifying a SIP code to completion code mapping](#) on page 328

[Adding a SIP code to completion code mapping](#) on page 328

[Deleting a SIP code to completion code mapping](#) on page 329

[SIP code to Completion Code page field descriptions](#) on page 329

Modifying a SIP code to completion code mapping

Before you begin

Create a custom completion code of type SIP.

It is recommended that you perform this operation during maintenance hours and ensure that no campaigns are running and no agents are logged in.

For more information about how to create a completion code of SIP type, see *New / Edit Completion Codes page field descriptions*

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **SIP Codes**.
3. On the SIP Code To Completion Code page, modify the fields as required.

For default mappings, you can modify only the **User Completion Code** field.

For user added mappings, you can modify **Sipcode/Event**, **Description**, and **User Completion Code** fields.

4. Click **Save**.

Related links

[Overview](#) on page 327

Adding a SIP code to completion code mapping

Before you begin

Create a custom completion code of type SIP.

It is recommended that you perform this operation during maintenance hours and ensure that no campaigns are running and no agents are logged in.

For more information about how to create a completion code of SIP type, see *New / Edit Completion Codes page field descriptions*

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **SIP Codes**.
3. On the SIP Code To Completion Code page, click **Add**.
4. In the **Sipcode/Event** field, type an alphanumeric value for the SIP code or event.

For more information, refer *SIP code, MPP code, and POM completion code mapping*

5. In the **Description** field, type a description for the SIP code.

You cannot select a value in the **POM Completion Code** field.

6. In the **User Completion Code** field, select the SIP type custom completion code that you want to map to the SIP Code.
7. Click **Save**.

Related links

[Overview](#) on page 327

Deleting a SIP code to completion code mapping

Before you begin

Create a SIP code and associate it to a user completion code.

It is best that you perform this operation during maintenance hours and ensure that no campaigns are running and no agents are logged in.

This option is available only for user added SIP code to completion code mappings.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Campaigns** menu, click **SIP Codes**.
3. On the SIP Code To Completion Code page, point to a SIP code and click **Delete** .
4. Click **Save**.

Related links

[Overview](#) on page 327

SIP code to Completion Code page field descriptions

* Note:

It is recommended that you perform these operations during maintenance hours and ensure that no campaigns are running and no agents are logged in.

Field	Description
Cancel	To cancel the current changes or modifications or operations done on the page after the last Save operation.
Default	To reset all the mappings that are provided out-of-the-box by POM to their default values. Therefore, for all the SIP code to completion code mappings provided out-of-the-box, POM overrides the User Completion Code with the default POM Completion Code.
Save	To save all the modifications such as add, delete, or modify done on the page.

Table continues...

Field	Description
Sipcode/Event	The alphanumeric value of the SIP code or event.
Description	The description of the SIP code or event.
POM Completion Code	The default system completion code mapped to the SIP code or event. For a user added SIP code to completion code mappings, this field is unavailable.
User Completion Code	The SIP type custom completion code that you select from the list.
Add	To display a new row for defining a new mapping between a SIP code and a completion code.
Delete 	To delete the mapping between a SIP code and a Completion Code. This option is available only for user added SIP code to completion code mappings.

Related links

[Overview](#) on page 327

Chapter 6: Managing Contacts

Contact Lists

Contact Lists overview

You can create contact lists and save the contact data of your customer in the contact lists. You can then use the contact lists in campaigns. You can import the contacts a file or database.

You can have multiple contact lists and segregate the contact data based on different criteria. For example, you can create a contact list containing data of all contacts staying in a specific zip code, or you can create a contact list with data of all contacts containing a particular blood group. Contact lists are useful for managing the data.

 Note:

Only one instance of a data source can be in an active state, that is, in running, paused, or error state.

 Note:

To ensure optimum performance and stability of POM, restrictions are imposed on number of parallel imports supported as well as on the number of contacts that can be imported or uploaded into the contact list at a time when POM is under high load. For more information on restrictions on imports, see *Avaya Proactive Outreach Manager Overview and Specification*.

An Org user creates the contact lists and associates the contact lists with the creator's organization. For example, a user Joe from the Sales organization (Sales/Joe), creates a new contact list called `POMCustomers`. This contact list is visible only to the Sales organization.

A global user can access all contact lists across all the organizations. A global user can give contact list access to multiple organizations as required. For example, a global user can give access to the `POMCustomers` contact list to the support organization if required.

For an Org user, the contact lists associated with the user's organization are accessible while creating campaigns.

 Note:

A global user does not belong to any organization and has the POM Administration and POM Campaign Manager roles. An organization user (Org user) belongs to an organization created in Avaya Experience Portal and has the Org POM Campaign Manager role.

Adding a contact list

About this task

Use this procedure to add new contact lists to your POM system.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, click **New Contact List**.
4. On the **Details** tab, specify the **Name**, **Description**, and **Zone Name**.
 - The **Description** field is optional.
 - The **Zone Name** field is available if you specify multiple zones.
5. Click **Save**.

POM displays the following message:

```
Contact list saved successfully
```

Related links

[New Contact List page field descriptions](#) on page 332

New Contact List page field descriptions

Table 1: Details tab

Field or Button	Description
Name	Use to specify a unique name for the contact list. The maximum length is 40 characters. You cannot edit the name after you save the contact list. You cannot use the following characters: space, +, ^, @, ~, `, !, ;, #, \$, %, &,), (, ?, ", <, >,], [, and comma(,)
Description	Use to specify a brief description for the contact list.
Zone Name	Use to specify the zone name for the contact list. You see this field only if you specify more than one zone.
Attribute that represents Customer ID for DNC	Use this list to select an attribute associated with the contact list that represents a Customer ID for DNC. The selected attribute helps to identify a customer record.
Save	Use to save the contact list.
Cancel	Use to cancel the procedure and return to the Contact List page.

Viewing the details of a contact list

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, under the **Contact List Name** column, click the required contact list to view the details.

Related links

[New Contact List page field descriptions](#) on page 332

Editing a contact list

About this task

You can go to the required tabs to edit the contact list.

Note:

You cannot edit the **Name** of a contact list.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, do one of the following:
 - Under the **Contact List Name** column, click the contact list to change the required fields.
 - Under the **Contact List Name** column, point to the required contact list and click  and click **Edit** to change the required fields.
4. Click **Save**.

Related links

[New Contact List page field descriptions](#) on page 332

Contact Lists page field descriptions

Use this page to view the contact lists and the contact records in the contact list. Depending on your user role, you can add, change, delete, and empty a contact list. If organizations are enabled, you can associate contact lists with specific organizations.

If you have no contact lists, POM displays the following message:

Record list is empty

You see the following columns when you add one or more contact lists:

Field or Button	Description
Search Contact List	Use to specify the contact list name to search.
	Use to go to the advanced search option to apply the following filter options: • Column Name: Use the list to select one of the following search criteria options: - Contact List Name - Zone Name - Allowed Organization • Operator: Use the list to select one of the following operators to specify the search criteria: - Equal to (=) - Not Equal to (!=) - in - like - not like • Search Text: Use to specify the text according to the selected Column Name and Operator.
	Use to clear the search.
Contact List Name	Displays the contact list name.  Note: You can click a contact list name edit the contact lists.
Zone Name	Displays the name of the zone in which the contact list is created or associated. You see this field only if you specify multiple zones.
Total Contacts	Displays the total number of contacts in the contact list. If the import is in progress for the given contact list, POM displays the message <i>In Progress</i> .
Available Contacts	Displays the contacts available for processing. When you remove contacts from the excluded contacts list, the contacts become available for dialing. So, Available Contacts = Total Contacts — Excluded Contacts .
Excluded Contacts	Displays the total number of contacts not processed after you exclude the contacts from a contact list.
Last Updated	Displays the last time you emptied a data source or ran an import. If the import is in progress for the given contact list, POM displays the message <i>In Progress</i> for this field till the import is over.  Note: The newly created contact lists display a Last Updated date of 12/31/1969 7:00:00 PM until you add contacts to the lists.

Table continues...

Field or Button	Description
Allowed Organizations	Displays the associated organizations with the contact list.  Note: If you do not have the multitenancy option turned on, you do not see this field. For more information about multitenancy, see the <i>Avaya Experience Portal</i> documentation.
Actions	POM displays  when you point the mouse over a contact list area. You can perform the following actions on all the contact lists: • Use Edit to edit a contact list. • Use Upload Contacts to upload the contacts into a contact list. • Use Empty Contact List to empty the contacts from a contact list. • Use Associate Organization to associate an organization with a contact list. • Use Export Contacts to export the contacts from a contact list. • Use Delete to delete a contact list.
New Contact List	Use this to add a new contact list.

About contact data source

With contact data sources, you can import, exclude, and organize contact records in a contact list. You can define two types of data sources such as file-based data source and database-based data source. You can import contact records from a `.csv` file into a contact list with the file-based data source. You can store the `.csv` file on a local file system or Secured File Transfer Protocol (SFTP) server. You can import contact records from an external database with the database-based data source. If the database is not running or not accessible, you cannot edit the data source.

If you use a data source with the **File** or **Database** option to add contacts, POM associates all the attributes with the contact list, including the attributes with null values in all the records. If you use the custom method to upload contacts, you must manually associate the attributes with null values. You must add an attribute to POM before you associate the attribute with a contact list. If a data source contains attributes not already added to POM, the contact import using the data source does not complete.

You can run data sources once to import data or exclude contacts, or schedule it to run at a defined date and time. You can also define a recurring schedule and import data at a fixed interval from an external file.

A global user can access all the data sources across all the organizations. An Org user can access data sources created by the users belonging to the specific organization.

 Note:

To ensure optimum performance and stability of POM, restrictions are imposed on number of parallel imports supported as well as on the number of contacts that can be imported or

uploaded into the contact list at a time when POM is under high load. For more information on restrictions on imports, see *Avaya Proactive Outreach Manager Overview and Specification*.

*** Note:**

A global user does not belong to any organization and has the POM Administration and POM Campaign Manager roles. An organization user (Org user) belongs to an organization created in Avaya Experience Portal and has the Org POM Campaign Manager role.

To assign a campaign-specific dialing priority for the contacts imported into a contact list, you can run data source import job during a running campaign. POM dials the imported contacts for the campaign according to the assigned dialing priority and the set filter criteria.

Contact data upload using the Browse File option

When you use the **File** option to add a data source, you can use **Browse File** to upload contacts in the selected contact list or exclude contacts from the selected contact list using a `.csv` file.

After uploading contacts, POM creates a data source record. You cannot edit or schedule this data source. You can only delete the data source. POM creates this data source entry for upload contacts.

*** Note:**

The maximum allowed file size is 50 MB.

If the uploaded file contains new attributes, POM displays a dialog box to add the new attributes and continue with the upload.

Ensure that you have a comma-separated `.csv` file with the contact data having only predefined attributes or a combination of predefined and custom attributes.

*** Note:**

All newly uploaded contacts are added to the jobs only if the contacts satisfy the filter criteria.

*** Note:**

- The ID attribute is mandatory. All other attributes are optional.
- If the contact data contains a comma as a part of the data, enclose the data with double-quotes.
- Comma as a part of an attribute data is supported only for the float and the string type of attributes.

The following is an example of a file with commas as part of the data:

```
id,firstname,lastname,phonenumber1,phoneNumber1CtryCode,phonenumber1State,phonenumber1al
lowedtime,phonenumber1disallowedtime,zipcodepredefined,zipcodetzpredefined,zipcodestatep
redefined,countrypredefined,address,language,salary,timezone
1,john,blake,02045342312,1,LA,0-6.10:00.16:00,0-6.13:00.14:00,90001,US/
Pacific,CA,USA_And_Canada,"72,north steet",en-us,"20000,00",PST
2,jane,doe,02034563433,1,LA,0-6.15:00.16:10,0-6.13:45.14:00,90002,US/
Pacific,CA,USA_And_Canada,"23,park street",en-us,"10000,00",PST
```

*** Note:**

- When you upload a `.csv` file to exclude contacts, POM only considers the value of the ID column and excludes all the contacts in the contact list with a matching ID value.

- If the value for a float type of the attribute has a comma as a part of the data, enclose the attribute in double-quotes at the time of import. While storing this value in the database, it is converted into a decimal separator.

The following is an example of a file with predefined and custom attributes:

```
id,firstname,phonenumber1,INV_STATUS
121,jane,919323456545,INV_ACP
123,jack,919845321245,INV_REJ
```

Caution:

- You can upload contacts from files with the ANSI or UTF-8 w/o Byte Order Mark (BOM) format.
- To import contacts, you can use the **Browse File** option only when the Campaign Director service running on the primary EPM is running as a Master Campaign Director service.

Adding data sources

About this task

Use this procedure to add a new data source to a contact list.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, click the required contact list.
4. Click the **Data Source** tab, and click **New Data Source**, and add relevant information.

Related links

[New Data Source first page field descriptions](#) on page 339

[New Data Source second page \(for automatic file import\) field descriptions](#) on page 350

[New Data Source second page \(for file import\) field descriptions](#) on page 353

[New Data Source second page \(for database import\) field descriptions](#) on page 361

[New Data Source third page \(for database import\) field descriptions](#) on page 363

[New Data Source second page \(for custom import\) field descriptions](#) on page 363

Data Source tab field descriptions

With this tab, you can create, schedule, edit, run, and delete the data sources.

If you do not have any data source configured, POM displays the following message:

Record list is empty

You see the columns listed below if you configure one or multiple data sources.

 Note:

If you have a database-based data source, you cannot edit the data source if the database is not running, or is not accessible.

Field or Button	Description
Search Data Source Name	Use to specify the data source name to search.
	Use to go to the advanced search option to apply the following filter options: • Column Name: Use the list to select one of the following search criteria options: - Data Source Name - Type • Operator: Use the list to select one of the following operators to specify the search criteria: - Equal to (=) - Not Equal to (!=) - in - like - not like • Search Text: Use to specify the text to search. This field is available if in Column Name you select Data Source Name. • Type: Use to select the data source type to search. This field is visible if in Column Name you select Type.
	Use to clear the search.
Data Source Name	Displays the contact data source name.
Type	Displays how the contact data is imported or excluded. This can be of the following types: Upload File, File- Local, File- SFTP, Database, Custom, Exclude Contacts Upload File, Exclude Contacts File – Local, Exclude Contacts File – SFTP, Exclude Contacts Database, and Exclude Contacts Custom. To import/exclude records using a .csv file and the file resides on POM server or external system, use the File Import type. To import/exclude records from MS-SQL, Oracle, or Postgres database to the POM database, use the Database import type. To implement your own mechanism to import records, use Custom Import type.
Last Executed	Displays the time when the data import was last executed.

Table continues...

Field or Button	Description
Actions	You can perform the following actions: - Use  to view more options such as Run Now, Details, Schedule, Edit, and Delete.  Note: POM displays  when you point the mouse over a contact list area. - Use Run Now to run a data source immediately without creating a schedule. - Use Details to view the detail of a data source. - Use Schedule to create a recurring or run-once schedule for a data source.  Note: This option is unavailable for the data sources with Automatically start import for file option disabled. - Use Edit to modify the properties of a data source. - Use Delete to delete a data source.  Note: For the data sources created with the Upload File option, only the following action items are available: Details Delete
New Data Source	Use to add a new data source.

New Data Source first page field descriptions

Use this page to import data for creating a contact data source.

 Note:

For all three ways in which you can create a data source, you must provide information in the fields described on this page.

If the POM database restarts during an import, you might lose some data.

Field or Button	Description
Data Source Name	Use to specify a unique identifier for the data source.  Note: • You can use a data source name length of maximum 40 characters. • You cannot edit this field after you save the data source. • You cannot use the following characters: - ^ - ~ - ` - ! - ' - ; - # - \$ - " - < - >

Table continues...

Field or Button	Description
Data Source description	Use to specify a brief description about the data source.  Note: • This field is optional. • You cannot use the following characters: - ^ - @ - ~ - ` - ! - ' - ; - , - # - \$ - % - & - (-) - { - } - ? - " - < - > - [-] - *

Table continues...

Field or Button	Description
Create Data Source Using	Use to select one of the following options: • File • Database • Custom  Note: This field is unavailable for editing after you save the data source.
What to do  Note: This field is unavailable for editing after you save the data source.	
Import Contacts	Select this check box to import contacts from the data source into the contact list.
Exclude Contact	Select this check box to exclude contacts from the contact list in the data source.

Table continues...

Field or Button	Description
Delete Records Before Import	Enable this option to delete the records from the contact list before importing data in the list. When you select this option, the following options are available for selection as required: • Delete All Records If you select this option, POM deletes all the contacts from the contact list. • Delete Records Matching Filter Template If you select this option and then choose a filter template from the drop-down list, POM will delete the contacts that match the criteria that you specify in the Filter Template. Click the Preview  icon to see the contacts that match the filter template that will get deleted. Records getting deleted will also be removed from the running campaigns to which the given contact list is attached. This is particularly helpful for infinite campaigns. • Pause Associated Campaigns If Emptying Contact List: If you select this option, all the running campaigns associated with the contact list pause, the contact list gets emptied, and the paused campaigns resume.  Caution: It is recommended to prohibit using this option when dialing is in progress. If the campaign jobs fail to pause within a stipulated timeout interval, the campaign jobs might remain in PAUSING/PAUSED state until they are manually resumed. If a contact list is associated with a running campaign, POM does not empty the contact list. • Ignore Active Exclude Contacts If Emptying Contact List: If you select this option, the contact list gets emptied keeping all the active exclude contacts in the contact list. • Ignore Callback On Contacts If Emptying Contact List: If you select this option, the contact list gets emptied, keeping all the callbacks on the contacts in the contact list. This option is required if the callbacks are on contacts and you want to empty the contact list. If a contact list contains callbacks and you do not select this option, POM does not empty the contact list.
Advanced Options	

Table continues...

Field or Button	Description
Automatically Start Import for file	If you enable this option, the file import starts automatically. The file path accepts only file name (relative path). you can import the CSV file available at the organization-specific location in the \$POM_HOME directory. When you enable Automatically Start Import for file: - You cannot assign any schedule to the data source, and when you try to create a schedule for this data source, POM displays the following message: <code>Operation not allowed as auto import found enabled for datasource.</code> - You cannot run this data source immediately using the Run Now option. When you try to run this data source immediately, POM displays the following message: <code>Operation not allowed as auto import found enabled for datasource.</code> If you enable Automatically start import for file, POM displays the following message: <code>Data Source created successfully.</code>  Note: Automatically start import for file option is available only for local file type of data sources. For more information see Enabling start automatic file import on page 349.
Automatically update time zone for phone numbers	Enable this option to automatically update the time zone attribute values for the phone numbers depending on the country code specified while entering the phone number, area code and prefix of the phone attribute value. If you specify the time zone attributes for the phone numbers before import, POM retains the value you sent and does not update the value.  Note: POM updates the time zone value only if it is not specified by the user. To specify a country code, you can use separate field, say, XXXX_etry_code, where XXXX is the name of the phone number field. Also, In the phone number you can specify the country code before the phone number using Country code separator. For example, if you specify a phone number as 1#4563234545, then 1 is the country code and # is the separator. If you do not specify a country code for any record, POM updates the record with the Home Country as specified in the global configuration. If you do not specify a time zone for any record, POM updates the record with the time zone of the zone associated with the contact list.

Table continues...

Field or Button	Description
Automatically update state for phone numbers	Enable this option to automatically update the state for the phone numbers depending on the country code specified while entering the phone number in the .csv file.  Note: - This option is available if advanced guard time is enabled. Advanced guard time is enabled by default. To enable or disable advanced guard time, go to Manager > Configurations > Global Configurations, and use Enable Advanced Guard Time Configuration. - POM updates the state value only if it is not specified by the user.
Automatically update wireless for phone numbers	Enable this option to automatically update the wireless field for the phone numbers depending on the country code specified while entering the phone number in the .csv file.  Note: - This option is available if advanced guard time is enabled. Advanced guard time is enabled by default. To enable or disable advanced guard time, go to Manager > Configurations > Global Configurations, and use Enable Advanced Guard Time Configuration. - POM updates the wireless value only if it is not specified by the user.
Check phone numbers for reject patterns	Enable this option if you do not want to import the contacts with the phone numbers matching the reject patterns. The reject patterns are specified in the Country Specific Phone Settings under Manager > Configurations > Country Specific Phone Settings. Use this option with the Empty phone on match with reject patterns or phone format rule option to import the contact and empty only the phone attributes.
Check phone numbers for phone formats rule	Enable this option if you do not want to import the contacts with the phone numbers not matching the Country Specific Phone Settings. The Country Specific Phone Settings rules are specified in the Country Specific Phone Settings under Manager > Configurations > Country Specific Phone Settings. Use this option with the Empty phone on match with reject patterns or phone format rule option to import the contact and empty only the phone attributes.
Check phone numbers/E-Mails for DNC	Enable this option if you do not want to import the contacts with addresses existing in the DNC list.  Note: Addresses added as User Contact ID and Customer ID into the DNC List are not considered in this check.
Clean up non numeric characters from phone numbers	Enable this option to remove the non-numeric characters from the phone numbers when importing the contacts.

Table continues...

Field or Button	Description
Empty phone on match with reject patterns or phone formats rule	Enable this option to empty the phone attribute when the phone numbers that match the reject patterns and the phone numbers that do not match the Country Specific Phone Settings rule when importing the contacts.
Empty invalid email addresses	Enable this option to empty the email attribute with the invalid email addresses when importing the contacts.
On duplicate record found	When you import a contact with matching ID value of an existing contact in the list, use this list to select one of the following options: • Update Existing - Use this option to update the contact already in the list with the attribute values of the most recently imported contact. • Ignore New Contact - Use this option to keep the attribute values of the contact in the list and ignore and newly imported contacts.
Running Job Association Use to specify priority for adding the uploaded contact records in the running campaigns. you can use this option if you have running campaigns associated with the specific contact list. The Running Job Association field is displayed only if the Import Contacts option is selected.	
Add priority	If there are running campaigns associated with a contact list, the option to select a priority to those campaigns is available. When you select this option, you can select the campaigns and a priority for each campaign to add the contacts to the campaign. Use to configure campaign-specific dialing priority for the contacts imported by a running data source during a running campaign. When you configure the dialing priority, the data source import job and campaign job must be in a running state. If any of these jobs are not running, the dialing priority is not assigned to the contacts. When you assign a dialing priority and if the data source import job and campaign job are running, then: • POM imports the contacts in the contact list. • at run-time, POM adds these imported contacts to the campaign job along with the dialing priority that you specify. • POM dials the contacts according to the dialing priority. In a running campaign, you can import contacts with only one dialing priority at one time. If a contact list is associated with multiple running campaigns, you can import the contacts by specifying different dialing priorities for different campaigns. For example, if a contact list is associated with two running campaigns, you can assign priority NINE for campaign 1 and priority SIX for campaign 2. The imported contacts are assigned priority 9 in campaign 1 and priority 6 in campaign 2.

Table continues...

Field or Button	Description
Priority ID	Displays the unique ID of the priority. Priority ID is auto-generated and cannot be edited.
Campaign Name	Click the campaign name. The Campaign Name field displays the list of all campaigns that are associated with the organization to which the logged in user belongs.

Table continues...

Field or Button	Description
Priority	Click the dialing priority that must be assigned to the contacts when the contacts are imported and added to the campaign you have selected in the Campaign Name field. The imported contacts are added to the running campaign job for dialing as per the associated priorities. The contacts are dialed in descending order of priority. That is, the higher the value, that higher is the priority. You can select any of the following priorities: • LOW • TWO • THREE • FOUR • MEDIUM • SIX • SEVEN • EIGHT • NINE • HIGH • BOTTOM • TOP Where: • LOW = 1 • MEDIUM = 5 • HIGH = 10 • BOTTOM: The maximum value is 0. The value decreases depending on the lowest priority contact list. • TOP: The minimum value is 11. The value increases depending on the highest priority contact list. See the following examples for priority calculation: • If you associate a contact list with LOW priority, the contacts are added with value 1. If you associate a contact list with BOTTOM priority, the contacts are added with value 0. If you associate another contact list to the same campaign job with BOTTOM priority, the contacts are added with priority -1. • Similarly, if you associate a contact list with HIGH priority, the contacts are added with value 10. If you associate a contact list with TOP priority, the contacts are

Table continues...

Field or Button	Description
	added with value 11. If you associate another contact list to the same campaign job with TOP priority, the contacts are added with priority 12. The default priority is MEDIUM. If the guard time restricts POM from dialing a contact, the contact is queued to a predefined POM queue. The contact is picked up from the queue for dialing based on the assigned priority.
Actions	Click  to delete the corresponding campaign and contact list priority for imported contacts association.

POM displays the time zones in the Contacts tab using the display names. To add, edit, or import contacts, you must specify the time zone using the time zone IDs. For a complete list of supported time zones, see [Supported time zones](#) on page 432.

Related links

[Adding data sources](#) on page 337
[Cleaning phone numbers](#) on page 364
[Deleting phone numbers](#) on page 365
[Deleting email addresses](#) on page 365

Enabling start automatic file import

About this task

On POM, the contact lists with local-file type data source can be enabled for automatic import with the filename.

To enable the start automatic file import option, you must perform the following steps:

Procedure

1. The client sends contact records in the file by using the SFTP protocol to the local directory on the POM server. After the file is copied on the POM server, the administrator moves the file to the file name that is defined in datasource at `$POM_HOME/public/<org-id>/contactlistimport`

First, transfer the file containing the contact records and then rename or move the file name that is defined in the datasource.

In case the POM setup involving the Primary and Auxiliary systems, mount an NFS location at `$POM_HOME/public/<org-id>/contactlistimport`.

The location must have read and write permissions.

After the Campaign Director processes a file, the Campaign Director archives the file.

Ensure that you configure a separate mount point for each organization on the POM server.

2. Ensure that the user used in the SFTP transfer of contact records to the local directory is included in the **avayavpgroup** linux group on the POM server.

If the user is not in the **avayavpgroup** linux group, do the following:

- a. Log on to the POM server with the credentials of a root user.

The POM server identifies you as a root user.

- b. Run the following command:

```
usermod -a -G avayavpgroup <username>
```

The POM server adds the user in the **avayavpgroup** linux group.

3. Ensure that the **csv** file is copied and moved with the correct system and location as per active campaign director for the assigned zone of the contact list.
4. The watchdog service for a specific directory detects the new file and automatically starts import for POM contact list.
5. POM identifies the data source based on the organization directory structure and filename under the location.

```
$POM_HOME/public/<org-id>/contactlistimport
```

6. For successfully imported contacts, the infinite campaign job starts to dial.
7. Import file must have the following specifications:
 - a. The csv file of UTF-8 encoding needs Id as first column.
 - b. You can use the Contact Attributes page to select specific attributes to generate sample csv file with the header.
 - c. The import file path and name are required to identify data source.
 - d. POM runs the matched data source based on trigger on new file addition on configured location.

Related links

[New Data Source second page \(for automatic file import\) field descriptions](#) on page 350

New Data Source second page (for automatic file import) field descriptions

This page is used to create a data source by specifying the file name option. After enabling **Automatically start import for file** and adding other relevant information on the New Data Source first page, POM displays the New Data Source second page with the options listed in the following table:

Name	Description
Upload Contacts From File	

Table continues...

Local path on the POM server (/opt/Avaya/avpom/POManager/public/default/contactlistimport/)	Use to specify the file name of the data source file. For a non-organization user, the default option is the Folder name. For an organization user, instead of the default option, use the Organization ID.  Note: The user uses this location to place the <code>csv</code> file. This location is relevant for all the organizations in Avaya Experience Portal. The recommended file path is available irrespective of whether the Automatically Start Import for file option is enabled or disabled.

Table continues...

Allow Bulk Import	Enable this option to automatically import or exclude multiple local files with the same name containing incremental numbering.  Note: This option is available if you enable Automatically start import for file. For more information on enabling Automatically start import for file, see New Data Source first page field descriptions on page 339. POM takes the file names with regular expression. For example, in Local path on the POM server, if you specify a file name such as <code>contactlist.csv</code>, POM imports all the files with the name <code>contactlist<digit>.csv</code> (<code>contactlist.csv</code>, <code>contactlist1.csv</code>, <code>contactlist2.csv</code>, and up to the number of files you save on the server).  Note: Store the incremental files on the server that has the active campaign director for the zone. To get the IP or FQDN of the active campaign director for the zone, use the <code>Get Active Campaign Director for a zone API</code>. For more information about the API, see <i>Developer Guide for Proactive Outreach Manager</i>. You can enable POM to import only one import for a data source per contact list. For example, if the user copies five files, only one import is running for the data source. You can enable POM to run multiple imports if there are multiple data sources for a contact list.  Note: • To maintain the import sequence of the incremental files of one data source, do not create two data sources enabling bulk import for a contact list. • If any error occurs during the import, POM notifies the error in the existing Kafka event.

Table continues...

How are fields separated from each other?	The following separators are used: • Comma (,) • Tab • Colon (:) • Semi colon (;) • Pipe () • Other The following are the other separators you can use: 1. # 2. \$ 3. & 4. % 5. . 6. / 7. \
Finish	Use to complete the data import procedure.

Related links

[Adding data sources](#) on page 337

[Enabling start automatic file import](#) on page 349

New Data Source second page (for file import) field descriptions

Use this page to create a data source using the File Import option. After selecting the **File** option and adding other relevant information on the New Data Source first page, POM displays the New Data Source second page with the options listed in the following table:

Note:

Ensure that the SFTP service is enabled on the server where data source file is located. By default, the SFTP service is enabled on Experience Portal Manager.

Field or Button	Description
Create Data Source Using	Use option button to select import from: • Local File Import • SFTP File Import  Note: You can upload contacts using SFTP only for files up to 1 GB in size. • Browse File  Note: This field is unavailable for editing after you save the data source.

Table continues...

Field or Button	Description
Local File Import	Use if the source file is located on the local machine. In Upload Contacts From File, you must mention the Local path on the POM server (Including file name) as the path from where the file uploads. The following is the Recommended path: <code>/opt/Avaya/avpom/POManager/public/default/contactlistimport/</code> To import a file, ensure that the avayavp user must have read permission on the file and all its parent directories. The root user can enable or disable the permissions by using the command <code>chmod 455</code>. For example, to import a file called <code>contacts.csv</code> from the location, <code>/home/craft/Contacts/Files/Today/contacts.csv</code>, ensure that you assign READ permission to all directories individually in the path, using <code>chmod</code> command. You can import files having either ANSI or UTF-8 w/o BOM format. You cannot use the following characters: • ^ • ~ • ` • ! • ' • ; • # • \$ • % • @ • • : • < • > • ? • * • \  Important: For 8.1.1 and later versions of Avaya Experience Portal, when a user copies a file to the POM system with the Local File Import option, the owner and group values of the user id are assigned. All the permissions (read, write, and execute) for other users are removed. Therefore, you cannot copy a file with the Local File Import option as other users.

Table continues...

Field or Button	Description
	To enable local file import for 8.1.1 and later versions of Avaya Experience Portal, do one of the following: • Make avayavp the owner of the file. • Include the user in the avayavp group. • Enable read permission for the other users for the file.  Note: The following is applicable only if you select the Exclude Contacts option. If you want to exclude contacts for specific number of days, use EXC_DNC_UNTIL_X_DAYS column in the file. For example, <pre>ID,EXC_DNC_UNTIL_X_DAYS 1,10 2,5 3, 4, 5,2</pre> When datasource configured with this file will run, contact record with ID 1 will be excluded for 10 days, record with ID 2 for 5 days, record with ID 5 for 2 days. For ID 3 and 4, no value is specified, hence these 2 records will be excluded permanently. EXC_DNC_UNTIL_X_DAYS column is optional and should be used only if you want to exclude contacts for specific number of days. If this column is not specified in the file then contacts will be excluded permanently.

Table continues...

Field or Button	Description
SFTP File Import	To import using the Secure File Transfer Protocol (SFTP).  Note: For SFTP server, if the PasswordAuthentication is set to No in the <code>/etc/ssh/sshd_config</code> file, you might get Auth Fail error. By default, the PasswordAuthentication value is set to No. Ensure you set the PasswordAuthentication to Yes. If you change the PasswordAuthentication value, then restart the sshd service for the changes to take effect. Specify the following parameters: • Secured: Enable this option to use a secure file transfer protocol for import. • SFTP Host name: Specify the hostname or IP address of the SFTP server.  Note: You cannot use the following characters: - ^ - ~ - ` - ! - ' - ; - # - \$ - " - < - > • User Name: Specify the username to connect to the SFTP server.  Note: - POM does not support Anonymous user. - You cannot use the following characters: • ^ • ~ • ` • ! • ' • ;

Table continues...

Field or Button	Description
	• # • \$ • " • < • > • Password: Specify the password to connect to the SFTP server. • Remote Path: Specify the remote location of the data source file.  Note: - POM uses standard port 22 for SFTP. - You cannot use the following characters: • ^ • ~ • ` • ! • ' • ; • # • \$ • % • @ • • : • < • > • ? • * • \  Note: The following is applicable only if you select the Exclude Contacts option. If you want to exclude contacts for specific number of days, use EXC_DNC_UNTIL_X_DAYS column in the file.

Table continues...

Field or Button	Description
	For example, <pre>ID,EXC_DNC_UNTIL_X_DAYS 1,10 2,5 3, 4, 5,2</pre> When datasource configured with this file will run, contact record with ID 1 will be excluded for 10 days, record with ID 2 for 5 days, record with ID 5 for 2 days. For ID 3 and 4, no value is specified, hence these 2 records will be excluded permanently. EXC_DNC_UNTIL_X_DAYS column is optional and should be used only if you want to exclude contacts for specific number of days. If this column is not specified in the file then contacts will be excluded permanently.
Browse File	Use to upload contacts in the selected contact list or exclude contacts from the selected contact list, using a .csv file. After uploading contacts, POM creates a data source record. You cannot edit or schedule this data source. You can only delete the data source. POM creates this data source entry for upload contacts.  Note: The following is applicable only if you select the Exclude Contacts option. If you want to exclude contacts for specific number of days, use EXC_DNC_UNTIL_X_DAYS column in the file. For example, <pre>ID,EXC_DNC_UNTIL_X_DAYS 1,10 2,5 3, 4, 5,2</pre> When datasource configured with this file will run, contact record with ID 1 will be excluded for 10 days, record with ID 2 for 5 days, record with ID 5 for 2 days. For ID 3 and 4, no value is specified, hence these 2 records will be excluded permanently. EXC_DNC_UNTIL_X_DAYS column is optional and should be used only if you want to exclude contacts for specific number of days. If this column is not specified in the file then contacts will be excluded permanently. Maximum allowed file size is 50 MB.

Table continues...

Field or Button	Description
How are fields separated from each other?	Use to specify the separators used in the file for separating fields. The separators can be: • Comma (,) • Tab • Colon (:) • Semi colon (;) • Pipe () • Other The following are the other separators you can use: 1. # 2. \$ 3. & 4. % 5. . 6. / 7. \  Note: If the contact data contains the selected delimiter, then you need to manually append double quotes to the data which has the same delimiters. For example, <pre> Contact List Attributes - id, name, address, age Two contacts are: 1,Alex,'This is my address',45 2,Oanh,'This, is, Jane's, address',35 Now let's consider we have exported this list so that we will get data like below after export, 1,Alex,This is my address,45 2,Oanh,This, is, Jane's, address,35 </pre> The data should be in the following format if it contains the delimiter: 2, Oanh, "This, is, Jane's, address", 35 Note here that the second record contains delimiter(.). Therefore, this data is encapsulated in double quotes (").
Finish	Use this to complete the data import wizard.

Related links

[Adding data sources](#) on page 337

New Data Source second page (for database import) field descriptions

Use this page to specify source database connection properties. After selecting the **Database** option and adding other relevant information on the New Data Source first page, POM displays the New Data Source second page with the options listed in the following table:

*** Note:**

All fields on this page are mandatory. If the POM database restarts during an import, you might lose some data.

Field or Button	Description
Import From Following Database:	
Database	Use the list to specify the database type. The following are the available options: MS-SQL, Postgres, and Oracle.
Database Host Name	Use to specify the hostname or IP address of the database server. * Note: You cannot use the following characters: • ^ • ~ • ` • ! • ' • ; • # • \$ • " • < • >

Table continues...

Field or Button	Description
Database Name	Use to specify the database name.  Note: You cannot use the following characters: • ^ • ~ • ` • ! • ' • ; • # • \$ • " • < • >
Database Port Number	Use to specify the port number to connect to the database. The default ports to connect to the database are: • 5432 to connect to Postgres database. • 1521 to connect to Oracle database. • 1433 to connect to MS-SQL database.
Database User Name	Use to specify the username to connect to the database.  Note: You cannot use the following characters: • ^ • ~ • ` • ! • ' • ; • # • \$ • " • < • >

Table continues...

Field or Button	Description
Database Password	Use to specify the password to connect to the database.
Test Connection	Use to test the database connection.
SQL Query	Use to specify the SQL query to get the data from the external database. For example if you set the SQL query as select * from EMP, this imports all data from the EMP table.  Note: You cannot specify any query which will modify the database data. For example, delete query, update query, insert query, or select into query. Ensure that the query length does not exceed more than 3990 characters. This limit is applicable for all databases.

Related links

[Adding data sources](#) on page 337

New Data Source third page (for database import) field descriptions

Use this page to map the fields of the external database to the existing predefined and custom attributes. After adding relevant information on the New Data Source second page for database import, POM displays the New Data Source third page for mapping the attributes.

Field or Button	Description
Attribute Name	Use the list to select the attribute to map.
Mapping Field	Use the list to select the field to map the selected attribute
Add Attribute	Click to add a row to add an attribute to map with the external database fields.
Finish	Use to finish the data source creation.
	Use to delete a row used for adding an attribute.

Related links

[Adding data sources](#) on page 337

New Data Source second page (for custom import) field descriptions

Use this page to specify name of the custom class. After selecting the **Custom** option and adding other relevant information on the New Data Source first page, POM displays the New Data Source second page with the options listed in the following table:

 Note:

Ensure that the jar file of the specified class is in the `$POM_HOME/lib/custom` folder.

Field or Button	Description
Import Data from following class	
Class Name	Use to specify the name of the class implemented for data import.  Note: - You must create a custom data connector to import data using the custom class. See <i>Developer's Guide for Proactive Outreach Manager</i>. - You cannot use the following characters: - ^ - ~ - ` - ! - ' - ; - # - \$ - " - < - >
Finish	Use to complete the data source creation.

Related links

[Adding data sources](#) on page 337

Cleaning phone numbers

About this task

Use this procedure to enable POM to clean up non-numeric characters from a phone number when you add a data source.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, click the required contact list.
4. Click the **Data Source** tab and click **New Data Source**.
5. On the New Data Source page, in **Advanced Options**, select **Clean up non numeric characters from phone numbers**.

A contact with a phone number attribute value that contains non numeric characters, such as a parenthesis, space, or dash, is rejected and not added to POM. If you select this option, the non-numeric characters is removed and the contact is added to POM.

6. Add the other relevant information required to add a data source, and click **Finish**.

Related links

[New Data Source first page field descriptions](#) on page 339

Deleting phone numbers

About this task

Use this procedure to enable POM to identify and empty invalid phone number attribute values from a contact list when you add a data source. The invalid phone numbers are the numbers that match the rejection criteria or do not match the Country Specific Phone Settings rules.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, click the required contact list.
4. Click the **Data Source** tab, and click **New Data Source**.
5. On the New Data Source page, in **Advanced Options**, do the following:
 - a. Select **Clean up non numeric characters from phone numbers**.
 - b. Select one or both of the following options:
 - **Check phone numbers for reject patterns**
 - **Check phone numbers for phone formats**
6. Add the other relevant information required to add a data source, and click **Finish**.

Related links

[New Data Source first page field descriptions](#) on page 339

Deleting email addresses

About this task

Use this procedure to enable POM to identify and empty invalid email addresses when you add a data source.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, click the required contact list.
4. Click the **Data Source** tab and click **New Data Source**.

5. On the New Data Source page, in **Advanced Options**, select **Empty invalid email addresses**.
6. Add the other relevant information required to add a data source, and click **Finish**.

Related links

[New Data Source first page field descriptions](#) on page 339

Creating a data source schedule

About this task

Use this procedure to create a recurring or run-once schedule for a contact data source.

Note:

To ensure optimum performance and stability of POM, restrictions are imposed on number of parallel imports supported as well as on the number of contacts that can be imported or uploaded into the contact list at a time when POM is under high load. For more information on restrictions on imports, see *Avaya Proactive Outreach Manager Overview and Specification*.

Caution:

If the POM database restarts during an import, you might lose some data.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, click the required contact list.
4. Click the **Data Source** tab, and under the **Data Source Name** column, point to the required data source and click  and click **Schedule**.
5. On the Schedule page, click **New Schedule**.
6. In the New Schedule dialog box, add relevant information, and click **Save**.

Related links

[New Schedule dialog box field descriptions](#) on page 366

New Schedule dialog box field descriptions

Use this dialog box to create a recurring or run-once schedule for the selected contact data source.

Note:

A data source schedule does not run if the schedule falls in the shift window with the Daylight Savings time (DST) clock change.

If there are any country-specific changes to the existing time zones, such as the addition of new time zones or changes to the Daylight Savings Time (DST) rules, you must delete and re-create a schedule.

For example, Russia has announced some changes to the standard time zones from 26 October 2014. If any of your data import falls in the changed time zones, you must delete and re-create the schedules so that the import jobs continue to run properly.

The time zone field in the schedule is used to specify the schedule start time for the specified time zone. POM converts the schedule start time to the current POM system-time and runs the schedule as per the time on the POM server. The POM system scheduler honors the DST of the current POM server and not the time zone mentioned when creating the schedule.

Field or Button	Description
Start Date & Time	Use to specify the schedule start date and time. Use the calendar wizard and the time-picker to select the date and the time. You can specify the time in 24-hour clock format.
Time Zone	Use the list to specify the time zone.
Recurring	Enable this option for creating a recurring schedule and specifying the recurring details. After you enable the Recurring option, the following fields are available: • Frequency - Use to select one of the following recurring frequencies: - Run Every N Minutes: This option creates a job for the contact data source for every N specified minute. For example, if you specify 45, it creates jobs every 45 minutes. So, if the first job starts at 12:00 hours, the second job starts at 12:45 hours and this continues until the finish date. - Daily: This option creates a job daily at the start time you mention during scheduling and continues until the finish date. - Weekly: This option creates jobs on selected days in a week. For example, if you select Monday and Friday, the weekly jobs are created on Monday and Friday at the start time mentioned during the schedule and this continues until the finish date. - Monthly: This option creates the jobs monthly depending on the start date until the finish date. - Yearly: This option creates the jobs yearly depending on the start date until the finish date. • weekdays Only - Use this recurring-frequency option to create a job on all days of the week except the weekend days that you specify in the Manager > Configurations > Global Configurations > Weekend days field. • Finish Date & Time - Use to specify the finish date and time for the schedule. Use the calendar wizard and the time-picker to select the date and the time. You can specify the time in 24-hour clock format.

Related links

[Creating a data source schedule](#) on page 366

Schedule page field descriptions

Use this page to create, delete, resume, and pause the schedules for a data source.

Field or Button	Description
Data Source Name	Displays the data source name you have selected to create a schedule.
ID	Displays the schedule ID.
Frequency	Displays the frequency of the data import.
Start Time	Displays the start time of the data import.
End Time	Displays the end time of the data import.
Status	Displays if the data source schedule is in running or pause state.
Actions	Use Pause to pause the schedule. Use Resume to resume the schedule. Use Delete to delete the schedule.
New Schedule	Use to add a schedule for data import.

Editing data source information

About this task

Use this procedure to modify the properties of a data source.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, click the required contact list.
4. Click the **Data Source** tab, and under the **Data Source Name** column, click the required data source.
5. After editing the required fields, click **Finish**.

Related links

[New Data Source first page field descriptions](#) on page 339

[New Data Source second page \(for automatic file import\) field descriptions](#) on page 350

[New Data Source second page \(for file import\) field descriptions](#) on page 353

[New Data Source second page \(for database import\) field descriptions](#) on page 361

[New Data Source third page \(for database import\) field descriptions](#) on page 363

[New Data Source second page \(for custom import\) field descriptions](#) on page 363

Viewing data source information

About this task

Use this procedure to view the summary information of the data source. Depending on the data type source you might see different information.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, click the required contact list.
4. Click the **Data Source** tab, and under the **Data Source Name** column, point to the required data source and click  and click **Details**.
5. After viewing the details, click **Close**.

Related links

[Data Source Information dialog box field descriptions](#) on page 369

Data Source Information dialog box field descriptions

Use this dialog box to view the summary information of the data source. Depending on the data source type, you see different information.

Data Source Information (for File type data source)

You see this summary information of data source when the data source is of **File** type .

Field or Button	Description
Data Source Name	Displays the data source name.
Data Source Description	Displays the data source description.
Contact List	Displays the contact list to which the data source belongs.
Retain Callback Contacts	Displays Yes or No depending on whether you selected to allow callbacks to be dialed even if the contact is excluded.
Empty Contact List before import	Displays Yes or No depending on whether you selected to empty the contact list before import.
Pause Associated Campaigns if Emptying Contact List	Displays Yes or No depending on whether you selected to pause all running campaigns that are associated with the contact list when emptying the contact list.
Ignore Active Exclude Contacts if Emptying Contact List	Displays Yes or No depending on whether you selected to ignore all active exclude contacts in the contact list when the emptying the contact list.
Ignore Callback On Contacts if Emptying Contact List	Displays Yes or No depending on whether you selected to ignore all callbacks on the contacts in the contact list when emptying the contact list.
Automatically update time zone for phone numbers	Displays Yes or No depending on whether you selected to automatically update the time zone for phone numbers.

Table continues...

Field or Button	Description
Automatically update state for phone numbers	Displays Yes or No depending on the value you selected to automatically update the state for phone numbers. This field changes if Enable Advanced Guard Time Configuration check box is selected.  Note: Advanced guard time is enabled by default.
Automatically update wireless for phone numbers	Displays Yes or No depending on the value you selected to automatically update the wireless field for phone numbers. This field changes if Enable Advanced Guard Time Configuration check box is selected.  Note: Advanced guard time is enabled by default.
Check phone numbers for reject patterns	Displays Yes or No depending on whether you selected to check the phone numbers for reject patterns.
Check phone numbers for phone formats rule	Displays Yes or No depending on whether you selected to check the phone numbers for Country Specific Phone Settings rules.
Check phone numbers / E-mails for DNC	Displays Yes or No depending on whether you selected to check if the phone numbers or email addresses are present in the DNC list.
Clean up non numeric characters from phone numbers	Displays Yes or No depending on whether you selected to remove the non-numeric characters from the phone numbers when importing the contacts.
Empty phone on match with reject patterns or phone formats rule	Displays Yes or No depending on whether you selected to remove the phone numbers that match the reject patterns and the phone numbers that do not match the Country Specific Phone Settings rule when importing the contacts.
Empty invalid email addresses	Displays Yes or No depending on whether you selected to remove the invalid email addresses when importing the contacts.
On duplicate record found	Displays whether you selected to update existing record or ignore the new record.
Type	Displays the data source type.
Local Path on POM server (Including file name)	Displays the path of the data source on the POM server.
Field Separator	Displays the separator used in the file for separating fields.
Close	Use to close the Data Source Information return to the Data Source tab.

Data Source Information (for File type data source with Automatically start import for file enabled)

You see this summary information of data source when the data source is of **File** type with **Automatically start import for file** enabled.

Field or Button	Description
Data Source Name	Displays the data source name.
Data Source Description	Displays the data source description.
Contact List	Displays the contact list to which the data source belongs.
Retain Callback Contacts	Displays Yes or No depending on whether you selected to allow callbacks to be dialed even if the contact is excluded.
Empty Contact List before import	Displays Yes or No depending on whether you selected to empty the contact list before import.
Pause Associated Campaigns if Emptying Contact List	Displays Yes or No depending on whether you selected to pause all running campaigns that are associated with the contact list when emptying the contact list.
Ignore Active Exclude Contacts if Emptying Contact List	Displays Yes or No depending on whether you selected to ignore all active exclude contacts in the contact list when the emptying the contact list.
Ignore Callback On Contacts if Emptying Contact List	Displays Yes or No depending on whether you selected to ignore all callbacks on the contacts in the contact list when emptying the contact list.
Automatically update time zone for phone numbers	Displays Yes or No depending on whether you selected to automatically update the time zone for phone numbers.
Automatically update state for phone numbers	Displays Yes or No depending on the value you selected to automatically update the state for phone numbers. This field changes if Enable Advanced Guard Time Configuration check box is selected.  Note: Advanced guard time is enabled by default.

Table continues...

Field or Button	Description
Automatically update wireless for phone numbers	Displays Yes or No depending on the value you selected to automatically update the wireless field for phone numbers. This field changes if Enable Advanced Guard Time Configuration check box is selected.  Note: Advanced guard time is enabled by default.
Automatically start import for file	Displays Yes or No depending on whether you selected to automatically start the import for file.
Check phone numbers for reject patterns	Displays Yes or No depending on whether you selected to check the phone numbers for reject patterns.
Check phone numbers for phone formats rule	Displays Yes or No depending on whether you selected to check the phone numbers for Country Specific Phone Settings rules.
Check phone numbers / E-mails for DNC	Displays Yes or No depending on whether you selected to check if the phone numbers or email addresses are present in the DNC list.
Clean up non numeric characters from phone numbers	Displays Yes or No depending on whether you selected to remove the non-numeric characters from the phone numbers when importing the contacts.
Empty phone on match with reject patterns or phone formats rule	Displays Yes or No depending on whether you selected to remove the phone numbers that match the reject patterns and the phone numbers that do not match the Country Specific Phone Settings rule when importing the contacts.
Empty invalid email addresses	Displays Yes or No depending on whether you selected to remove the invalid email addresses when importing the contacts.
On duplicate record found	Displays whether you selected to update existing record or ignore the new record.
Type	Displays the data source type.
Local Path on POM server	Displays the path of the data source on the POM server.
Allow Bulk Import	Displays if the incremental file import feature is enabled.
Close	Use to close the Data Source Information return to the Data Source tab.

Data Source Information (for Database type data source)

You see this summary information of data source when the data source is of **Database** type.

Field or Button	Description
Data Source Name	Displays the data source name.
Data Source Description	Displays the data source description.
Contact List	Displays the contact list to which the data source belongs.
Retain CallBack Contacts	Displays Yes or No depending on whether you selected to allow callbacks to be dialed even if the contact is excluded.
Empty Contact List before import	Displays Yes or No depending on whether you selected to empty the contact list before import.
Pause Associated Campaigns if Emptying Contact List	Displays Yes or No depending on whether you selected to pause all running campaigns that are associated with the contact list when emptying the contact list.
Ignore Active Exclude Contacts if Emptying Contact List	Displays Yes or No depending on whether you selected to ignore all active exclude contacts in the contact list when the emptying the contact list.
Ignore Callback On Contacts if Emptying Contact List	Displays Yes or No depending on whether you selected to ignore all callbacks on the contacts in the contact list when emptying the contact list.
Automatically update time zone for phone numbers	Displays Yes or No depending on whether you selected to automatically update the time zone for phone numbers.
Automatically update state for phone numbers	Displays Yes or No depending on the value you selected to automatically update the state for phone numbers. This field changes if Enable Advanced Guard Time Configuration check box is selected.  Note: Advanced guard time is enabled by default.
Automatically update wireless for phone numbers	Displays Yes or No depending on the value you selected to automatically update the wireless field for phone numbers. This field changes if Enable Advanced Guard Time Configuration check box is selected.  Note: Advanced guard time is enabled by default.
Check phone numbers for reject patterns	Displays Yes or No depending on whether you selected to check the phone numbers for reject patterns.
Check phone numbers for phone formats rule	Displays Yes or No depending on whether you selected to check the phone numbers for Country Specific Phone Settings rules.

Table continues...

Field or Button	Description
Check phone numbers / E-mails for DNC	Displays Yes or No depending on whether you selected to check if the phone numbers or email addresses are present in the DNC list.
Clean up non numeric characters from phone numbers	Displays Yes or No depending on whether you selected to remove the non-numeric characters from the phone numbers when importing the contacts.
Empty phone on match with reject patterns or phone formats rule	Displays Yes or No depending on whether you selected to remove the phone numbers that match the reject patterns and the phone numbers that do not match the Country Specific Phone Settings rule when importing the contacts.
Empty invalid email addresses	Displays Yes or No depending on whether you selected to remove the invalid email addresses when importing the contacts.
On duplicate record found	Displays whether you selected to update existing record or ignore the new record.
Type	Displays the data source type.
Database	Displays the database you use. For example, Postgres or Oracle.
Database Host Name	Displays the IP address of the system on which you install the database.
Database Port Number	Displays the port number used to connect to the database.
Database Name	Displays the name of the database.
Database User Name	Displays the user name used to connect to the database.
SQL Query	Displays the query used to populate the records.
Mapping For Attributes - Displays the mapping of the external database to the existing predefined and custom attributes.	
Attribute Name	Displays the attribute used for mapping.
Mapping Field	Displays the field used for mapping.
Close	Use to close the Data Source Information return to the Data Source tab.

Data Source Information (for Custom type data source)

You see this summary information of data source when the data source is of **Custom** type.

Field or Button	Description
Data Source Information	
Data Source Name	Displays the data source name.
Data Source Description	Displays the data source description.
Contact List	Displays the contact list to which the data source belongs.
Retain CallBack Contacts	Displays Yes or No depending on whether you selected to allow callbacks to be dialed even if the contact is excluded.

Table continues...

Field or Button	Description
Empty Contact List before import	Displays Yes or No depending on whether you selected to empty the contact list before import.
Pause Associated Campaigns if Emptying Contact List	Displays Yes or No depending on whether you selected to pause all running campaigns that are associated with the contact list when emptying the contact list.
Ignore Active Exclude Contacts if Emptying Contact List	Displays Yes or No depending on whether you selected to ignore all active exclude contacts in the contact list when the emptying the contact list.
Ignore Callback On Contacts if Emptying Contact List	Displays Yes or No depending on whether you selected to ignore all callbacks on the contacts in the contact list when emptying the contact list.
Automatically update time zone for phone numbers	Displays Yes or No depending on whether you selected to automatically update the time zone for phone numbers. This field changes if Enable Advanced Guard Time Configuration check box is selected.  Note: Advanced guard time is enabled by default.
Automatically update state for phone numbers	Displays Yes or No depending on the value you selected to automatically update the state for phone numbers. This field changes if Enable Advanced Guard Time Configuration check box is selected.  Note: Advanced guard time is enabled by default.
Automatically update wireless for phone numbers	Displays Yes or No depending on the value you selected to automatically update the wireless field for phone numbers. This field changes if Enable Advanced Guard Time Configuration check box is selected.  Note: Advanced guard time is enabled by default.
Check phone numbers for reject patterns	Displays Yes or No depending on whether you selected to check the phone numbers for reject patterns.
Check phone numbers for phone formats rule	Displays Yes or No depending on whether you selected to check the phone numbers for Country Specific Phone Settings rules.

Table continues...

Field or Button	Description
Check phone numbers / E-mails for DNC	Displays Yes or No depending on whether you selected to check if the phone numbers or email addresses are present in the DNC list.
Clean up non numeric characters from phone numbers	Displays Yes or No depending on whether you selected to remove the non-numeric characters from the phone numbers when importing the contacts.
Empty phone on match with reject patterns or phone formats rule	Displays Yes or No depending on whether you selected to remove the phone numbers that match the reject patterns and the phone numbers that do not match the Country Specific Phone Settings rule when importing the contacts.
Empty invalid email addresses	Displays Yes or No depending on whether you selected to remove the invalid email addresses when importing the contacts.
On duplicate record found	Displays whether you selected to update existing record or ignore the new record.
Type	Displays the data source type.
Class Name	Displays the class name you use to import the data source.
Close	Use to close the Data Source Information return to the Data Source tab.

Running Job Association fields on the Data Source Information dialog box

The **Running Job Association** area is displayed on the Data Source Information dialog box only if the **Import Contacts** option was selected when the data source was added to POM.

Field or Button	Description
Priority ID	Displays the unique ID of the priority.
Campaign Name	Displays the campaign name for which the corresponding contact list priority for the imported contacts is configured.

Table continues...

Field or Button	Description
Priority	Displays the dialing priority configured for the imported contacts for the corresponding campaign. The priority can be: • LOW • TWO • THREE • FOUR • MEDIUM • SIX • SEVEN • EIGHT • NINE • HIGH • BOTTOM • TOP

Related links

[Viewing data source information](#) on page 368

Running a data source

About this task

Use this procedure to run a configured data source immediately without creating a schedule.

 Note:

To ensure optimum performance and stability of POM, restrictions are imposed on number of parallel imports supported as well as on the number of contacts that can be imported or uploaded into the contact list at a time when POM is under high load. For more information on restrictions on imports, see *Avaya Proactive Outreach Manager Overview and Specification*.

 Note:

If the POM database restarts during an import, you might lose some data.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, click the required contact list.
4. Click the **Data Source** tab, and under the **Data Source Name** column, point to the required data source and click  and click **Run now**.

POM displays the following message: Job has been created for Data Source <data source name>.

Related links

[Data Source tab field descriptions](#) on page 337

Contact priority-based dialing scenarios with parallel dialing disabled

If the Parallel Dialing feature is disabled, POM fetches one record in advance for dialing from the contact list when handing over a dialed call to the agent.

For example, when handing over a dialed call for contact ID 1 to the agent, POM fetches contact ID 2 in advance for dialing.

This topic provides dialing scenarios based on the priority of contacts added to a running campaign by an upload contact job or a data source import job.

The following scenarios are valid irrespective of whether the contacts are added by an upload contact job or a data source import job during a running campaign.

The dialing order configured for all the following scenarios is: Priority→ Retry→Regular

Example 1

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Number of contact lists associated with campaign A: 1 (Contact list 1).
- Dialing allocation percentage for the contact list: 100%
- Parallel Dialing feature: Disabled.
- Agent state: Ready.
- A data source import job adds records with Top priority to contact list 1 when campaign A is running.

The **On duplicate record found** option on the New Data Source first page is set to: **Update Existing**.

Dialing flow:

1. Campaign A starts.
2. POM dials contact ID 1.

When dialing for contact ID 1 is in progress, a data source import job is run to add records with Top priority to contact list 1. These records are contact IDs 7, 8, 9, 10, 11.

Because the **On duplicate record found** option is set to **Update Existing** on the New Data Source first page, the import job updates the priority of the existing contact IDs 7, 8, 9, 10 to Top priority, and adds the new contact ID 11 with Top priority to contact list 1.

3. After the call for contact ID 1 is completed, POM dials the remaining records in the following order:
 - a. Contact ID 2 which was already picked up for dialing when handing over the call for contact ID 1 to the agent.
 - b. The records with Top priority, which are contact IDs 7, 8, 9, 10, 11.
 - c. The remaining records, which are contact IDs 3, 4, 5, 6.

Example 2

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Number of contact lists associated with campaign A: 1 (Contact list 1).
- Dialing allocation percentage for the contact list: 100%
- Parallel Dialing feature: Disabled.
- Agent state: Ready.
- A data source import job adds records with Top priority to contact list 1 when campaign A is running.

The **On duplicate record found** option on the New Data Source first page is set to: **Ignore New Contact**.

Dialing flow:

1. Campaign A starts.
2. POM dials contact ID 1.

When dialing for contact ID 1 is in progress, a data source import job is run to add records with Top priority to contact list 1. These records are contact IDs 7, 8, 9, 10, 11.

Because the **On duplicate record found** option is set to **Ignore New Contact** on the New Data Source first page, the import job adds only the new contact ID 11 with Top priority to contact list 1.

The priority of the existing contact IDs 7, 8, 9, 10 remain unchanged.

3. After the call for contact ID 1 is completed, POM dials the remaining records in the following order:
 - a. Contact ID 2 which was already picked up for dialing when handing over the call for contact ID 1 to the agent.
 - b. The record with Top priority, which is contact ID 11.
 - c. The remaining records, which are contact IDs 3, 4, 5, 6, 7, 8, 9, 10.

Example 3

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.

- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2).
- Dialing allocation percentage for each contact list: 50%
Hence, in each dialing cycle, five records from contact list 1 are dialed first, and then five records from contact list two are dialed.
- Parallel Dialing feature: Disabled.
- Agent state: Ready.
- **Pause Dialing During Contact Selection** check box on the campaign creation page when creating campaign A: Disabled.
- A data source import job adds records with Top priority to contact list 1 when campaign A is running.

The **On duplicate record found** option on the New Data Source first page is set to: **Update Existing**.

Dialing flow:

1. Campaign A starts.

2. In the first dialing cycle:

As per the dialing allocation, contact ID 1 through contact ID 5 from contact list 1 are to be dialed first.

a. POM dials contact ID 1 through contact ID 5 from contact list 1.

The calls are completed.

As per the dialing allocation, contact ID 11 through contact ID 15 from contact list 2 are to be dialed next.

b. POM dials contact ID 11.

When dialing for contact ID 11 is in progress, a data source import job is run to add records with Top priority to contact list 1. These records are contact IDs 7, 8, 9, 10, 21.

Because the **On duplicate record found** option is set to **Update Existing** on the New Data Source first page, the import job updates the priority of the existing contact IDs 7, 8, 9, 10 to Top priority, and adds the new contact ID 21 with Top priority to contact list 1.

c. The call for contact ID 11 is completed.

d. Because the **Pause Dialing During Contact Selection** feature is disabled, POM dials the remaining records from contact list 2, which are contact IDs 12, 13, 14, 15.

Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the second dialing cycle starts.

3. In the second dialing cycle:

a. POM dials the records with Top priority from contact list 1, which are contact IDs 7, 8, 9, 10, 21.

b. POM dials the remaining records from contact list 2, which are contact IDs 16, 17, 18, 19, 20.

Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the third dialing cycle starts.

4. In the third dialing cycle:

a. POM dials the remaining record from contact list 1, which is contact ID 6.

Example 4

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2)
- Dialing allocation percentage for each contact list: 50%

Hence, in each dialing cycle, 5 records from contact list 1 are dialed first, and then 5 records from contact list 2 are dialed.

- Parallel Dialing feature: Disabled.
- Agent state: Ready.
- **Pause Dialing During Contact Selection** check box on the campaign creation page when creating campaign A: Disabled.
- A data source import job adds records with Top priority to contact list 1 when campaign A is running.

The **On duplicate record found** option on the New Data Source first page is set to: **Ignore New Contact**.

Dialing flow:

1. Campaign A starts.
2. In the first dialing cycle:

As per the dialing allocation, contact ID 1 through contact ID 5 from contact list 1 are to be dialed first.

a. POM dials contact ID 1 through contact ID 5 from contact list 1.

The calls are completed.

As per the dialing allocation, contact ID 11 through contact ID 15 from contact list 2 are to be dialed next.

b. POM dials contact ID 11.

When dialing for contact ID 11 is in progress, a data source import job is run to add records with Top priority to contact list 1. These records are contact IDs 7, 8, 9, 10, 21.

Because the **On duplicate record found** option on the New Data Source first page is set to **Ignore New Contact**, the import job adds only the new contact ID 21 with Top priority to contact list 1.

The priority of the existing contact IDs 7, 8, 9, 10 remain unchanged.

- c. The call for contact ID 11 is completed.
 - d. Because the **Pause Dialing During Contact Selection** feature is disabled, POM dials the remaining records from contact list 2, which are contact IDs 12, 13, 14, 15.
Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the second dialing cycle starts.
3. In the second dialing cycle:
 - a. POM dials the record with Top priority from contact list 1, which is contact ID 21.
 - b. POM dials contact IDs 6, 7, 8, 9 from contact list 1.
This sums up to 5 records from contact list 1 for this dialing cycle, that is, contact IDs 21, 6, 7, 8, 9.
 - c. POM dials the remaining records from contact list 2, which are contact IDs 16, 17, 18, 19, 20.
Because 50% dialing is completed for each contact list, that is, contact list 1 and 2, the third dialing cycle starts.
4. In the third dialing cycle:
 - a. POM dials the remaining record from contact list 1, which is contact ID 10.

Example 5

Conditions:

- Contact list 1 contains 10 records, which are contact IDs 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.
- Contact list 2 contains 10 records, which are contact IDs 11, 12, 13, 14, 15, 16, 17, 18, 19, 20.
- Number of contact lists associated with campaign A: 2 (Contact lists 1 and 2).
- Dialing allocation percentage for each contact list: 50%
Hence, in each dialing cycle, five records from contact list 1 are dialed first, and then five records from contact list two are dialed.
- Parallel Dialing feature: Disabled.
- Agent state: Ready.
- **Pause Dialing During Contact Selection** check box in the campaign creation page when creating campaign A: Enabled.
- A data source import job adds records with Top priority to contact list 1 when campaign A is running.

The **On duplicate record found** option on the New Data Source first page is set to: **Update Existing**.

Dialing flow:

1. Campaign A starts.
2. In the first dialing cycle:

As per the dialing allocation, contact ID 1 through contact ID 5 from contact list 1 are to be dialed first.

- a. POM dials contact ID 1 through contact ID 5 from contact list 1.

The calls are completed.

As per the dialing allocation, contact ID 11 through contact ID 15 from contact list 2 are to be dialed next.

- b. POM dials contact ID 11.

When dialing for contact ID 11 is in progress, a data source import job is run to add records with Top priority to contact list 1. These records are contact IDs 7, 8, 9, 10, 21.

Because the **On duplicate record found** option is set to **Update Existing** on the New Data Source first page, the import job updates the priority of the existing contact IDs 7, 8, 9, 10 to Top priority, and adds the new contact ID 21 with Top priority to contact list 1.

- c. The call for contact ID 11 is completed.
- d. POM dials contact ID 12 which was already picked up for dialing when handing over the call for contact ID 11 to the agent.
- e. Because the **Pause Dialing During Contact Selection** feature is enabled, irrespective of the dialing allocation, POM dials the records with Top priority from contact list 1, which are contact IDs 7, 8, 9, 10, 21.
- f. POM dials contact IDs 13, 14, 15 from contact list 2.

3. In the second dialing cycle:

- a. POM dials the remaining record from contact list 1, which is contact ID 6.
- b. POM dials the remaining records from contact list 2, which are contact IDs 16, 17, 18, 19, 20.

Associating an organization with a contact list

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, under the **Contact List Name** column, point to the required contact list.

POM displays  for more options.

4. Point to  and click **Associate Organization**.

POM displays the Organization Association dialog box.

5. From the **Allowed Organization** list, select the required organizations.

To select all the organizations at once, select the **Allowed Organization** check box.

6. Click **Save**.

Related links

[Organization Association dialog box field descriptions](#) on page 384

Organization Association dialog box field descriptions

Use this dialog box to associate the contact list with the available organizations.

Field or Button	Description
Allowed Organizations	Displays the list of allowed organizations.
Save	Use to save the changes.
Cancel	Use to cancel the procedure and return to the Contact Lists page.

Related links

[Associating an organization with a contact list](#) on page 383

Exporting Contacts from a Contact List

About this task

Use this procedure to export contacts from a contact list. POM exports contacts to a text based file of the `.csv` format. Users can download this file when the export operation is complete.

To export contacts, the user must have the Export Contacts role.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, under the **Contact List Name** column, point to the required contact list.

POM displays  for more options.

4. Point to  and click **Export Contacts**.

POM displays the Export Contacts page.

5. In the **How are fields separated from each other** area, select a delimiter from the following options:

- **Comma(,)**
- **Tab**
- **Colon (:)**
- **Semicolon (;)**
- **Pipe(|)**

- **Other (You must type a special character in the field)**

6. In the **Select the attributes to include in the export** area, do the following:
 - a. To move an attribute from the **Available Attributes** list to the **Selected Attributes** list, select the attribute and click **+**.
 - b. To move all attributes from the **Available Attributes** list to the **Selected Attributes** list, click **Add All**.
 - c. To remove an attribute from the **Selected Attributes** list to the **Available Attributes** list, select that attribute and click **-**.
 - d. To remove all attributes from the **Selected Attributes** list to the **Available Attributes** list, click **Remove All**.

Ensure that you arrange the attributes in the order in which the file is to be exported. The ID attribute will always appear as the first column in the export file regardless of its specified order.

7. Click **Export**.

POM exports the contacts from the contact list with the selected attributes.

Export Contacts dialog box field descriptions

Use this dialog box to select contact attributes.

Name	Description
How are fields separated from each other ?	Choose a delimiter to separate the data. User can use one of the following delimiters or can provide a delimiter of their choice. Select one of the following options: • Comma(,) • Tab • Colon(:) • Semicolon(;) • Pipe() • Other: Type the option in the text box.  Note: The following are the invalid separators: • Period (.) • # • \$ • & • % • /
Available Attributes	Displays the list of attributes associated with the contact list. You can select multiple attributes and can move the attributes to the selected attributes list.
Selected Attributes	Displays the list of attributes selected to be exported. You can specify the order in which the attributes are exported. Ensure that you arrange the attributes in the order in which the file is to be exported. The ID attribute will always appear as the first column in the export file regardless of its specified order.
Add (+)	To move an attribute from the Available Attributes list to the Selected Attributes list, select the attribute and click (+).

Table continues...

Name	Description
Add All (+)	To move all attributes from the Available Attributes list to the Selected Attributes list, click Add All (+). Click to add all the attributes at once which you want to export.
Remove (-)	To remove an attribute from the Selected Attributes list to the Available Attributes list, select that attribute and click (-).
Remove All	To remove all attributes from the Selected Attributes list to the Available Attributes list, click Remove All (-).
Cancel	Click to navigate to Contact lists page. If you click this button to go back, then a running or active export stops and cancels and you will have to perform the export again.
Export	Click to start the export of the contact list. After POM verifies whether the selected attributes are correct, POM starts the export. After the export starts, POM displays the percentage of the completion of the export. Note: If you do not select any attributes, then this button is disabled. When the export is in progress, the user should not close or refresh the page or navigate to any other page, else the export operation aborts and the export operation will have to be restarted. The export file generated and downloaded once, will not be available if the user navigates to any other page and navigates back to the export page. To download the export file, user has to export the file again.
Download	Click to download the export file. After the export fully completes, POM shows the Download button.

Associating attributes with a contact list

About this task

Use this procedure to associate attributes with a contact list.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, click the required contact list, and click the **Attributes** tab.

4. In the **Contact List - Attributes Association** section do the following:
 - a. To move an attribute from the **Available Attributes** list to the **Selected Attributes** list, select the attribute and click **+**.
 - b. To move all attributes from the **Available Attributes** list to the **Selected Attributes** list, click **Add All**.
 - c. To remove an attribute from the **Selected Attributes** list to the **Available Attributes** list, select that attribute and click **—**.
 - d. To remove all attributes from the **Selected Attributes** list to the **Available Attributes** list, click **Remove All**.
5. Click **Save**.

POM associates the **Selected Attributes** to the contact list in the order you specify.

Related links

[Attributes tab field descriptions](#) on page 389

Associating attributes for customer journey information

About this task

Use this procedure to configure the customer journey Application Programming Interface (API). POM uses this API to obtain the customer journey information from Avaya Oceana® and publishes the information to the Context Store server. The customer journey information contains the outbound attempt details such as the customer ID, whether the customer already exists, and other details.

You can associate and send the following attributes to Customer Management for searching a contact:

- The customer ID
- The attempted phone number
- Four phone numbers

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, click the required contact list, and click the **Attributes** tab.
4. In the **Customer Journey - Attributes Association** section, do the following:
 - a. From the **Select Attribute that represents Customer ID** list, select the customer ID attribute.
 - b. In **Customer ID Retrieval Mode**, select the required option.
 - c. Select the **Select Multiple Phone Fields** selection box, to select four phone-number attributes.

POM displays the **Available Attributes** list and the **Selected Attributes** list.

 Note:

You cannot select more than four phone-number attributes. If you select more than four phone-number attributes, POM displays the following error message: `Limit Exceeded. You cannot assign more than 4 Phone attributes.`

- d. To move an attribute from the **Available Attributes** list to the **Selected Attributes** list, select the attribute and click **+**.
- e. To move all attributes from the **Available Attributes** list to the **Selected Attributes** list, click **Move All**.
- f. To remove an attribute from the **Selected Attributes** list to the **Available Attributes** list, select that attribute and click **—**.
- g. To remove all attributes from the **Selected Attributes** list to the **Available Attributes** list, click **Remove All**.

POM uses these **Selected Attributes** to obtain the customer journey information.

5. Click **Save**.

Related links

[Attributes tab field descriptions](#) on page 389

Attributes tab field descriptions

Use this tab to associate attributes in the following sections:

- **Contact List - Attributes Association** - To associate the attributes to the selected contact list.

 Note:

You cannot associate more than 150 attributes per contact list.

- **Customer Journey - Attributes Association** - To associate attributes to obtain customer journey information.

Field or Button	Description
Contact List - Attributes Association	
Available Attributes	Displays the list of attributes that you select and associate with the selected contact list. You can select multiple attributes and can move the attributes to the selected attributes list.
Selected Attributes	Displays the list of selected attributes to associate with the selected contact list. You can specify the order in which the attributes are associated. While exporting the contacts after job completion, the system considers the order of the attributes that you specify in the selected attributes. For more information about exporting contacts after job completion, see Campaign Export Files page field descriptions on page 129.
Customer Journey - Attributes Association	

Table continues...

Field or Button	Description
Select Attribute that represents Customer ID	Use this list to select an attribute that represents a Customer ID. The selected attribute helps to identify a customer record. For details about a valid attribute value, see <i>Avaya Context Store Snap-in Developer Guide</i>.
Customer ID retrieval mode	The Customer ID retrieval mode defines whether POM needs to retrieve the Customer ID from the Customer Management snap-in. The Customer ID retrieval mode has the following three options: • Always: Enable this option to always fetch the Customer ID from the Customer Management snap-in. When you select Always, the attribute you select in Select Attribute that represents Customer ID is used to fetch the Customer ID and the contact attempted address. If the Select Attribute that represents Customer ID value is blank, POM retrieves the Customer ID using the contact address. • Never: When you select this option, POM never fetches the Customer ID from the Customer Management snap-in. The attribute value that you select in Select Attribute that represents Customer ID, represents the actual Customer ID. If this attribute has an empty or null value, POM does not push the Customer ID to Context Store. • Attribute Value is Blank: When you enable this option and keep the Select Attribute that represents Customer ID blank, POM fetches the Customer ID from the Customer Management snap-in. Otherwise POM uses the contact attempt address as input to retrieve the Customer ID. When you select the Attribute Value is Blank option and the Select Multiple Phone Fields option, POM sends only the attempted phone number. However, POM does not send the phone numbers selected from the Available Attributes list.  Important: Customer ID selection is mandatory with the Select Multiple Phone Fields option.  Note: Select the Select Multiple Phone Fields option only if your Context Store version is 3.8.1 or later. Context Store snap-in and Customer Management snap-in are always deployed on the same server.
Save	Use to save the changes.

Related links

[Associating attributes with a contact list](#) on page 387

[Associating attributes for customer journey information](#) on page 388

Adding a contact record to a contact list

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.

3. On the Contact Lists page, click the required contact list.
4. Click the **Contacts** tab, and click **New Contact**.
5. On the New Contacts page, do the following:
 - a. In **Phone Attributes**, specify the required attributes.
 - b. In **Custom Attributes**, specify the required attributes.
 - c. Click **Select Attributes**, and in the Select Attributes dialog box, select the required attributes, and click **Add**.
 - d. Click **Save**.

Related links

[New Contacts page field descriptions](#) on page 391

New Contacts page field descriptions

Use this page to add a new contact record in a contact list.

Note:

The phone-number cleanup feature is activated by default and applies when you add a new contact.

Field or Button	Description
Contact List Name	Displays the name of the contact list.
Predefined Attributes	Use to specify the values for the predefined attributes. For the list of predefined attributes, see Overview on page 409.
Phone Attributes	Use to specify the values for the phone attributes.
Custom Attributes	Use to specify the values for the custom attributes.
Select Attributes	Use to go to the Select Attributes dialog box to select and add more attributes with Predefined Attributes , Phone Attributes , and Custom Attributes .  Note: - By default, the Select Attributes dialog box only displays the associated attributes. - If a contact record does not have a value for a newly added attribute, POM does not show that attribute.

POM displays the time zones in the Contacts tab using the display names. To add, edit, or import contacts, you must specify the time zone using the time zone IDs. For the list of supported time zones, see [Supported time zones](#) on page 432.

For the list of supported time zones for the Advanced Guard Time feature, see [Supported time zone after enabling advanced guard time](#) on page 451.

POM supports G14 languages. For a complete list of supported languages, see [Supported languages](#) on page 43.

 Note:

If you use the predefined Language attribute, POM allows only specific values (for example, en-us to specify US English)

Related links

[Adding a contact record to a contact list](#) on page 390

Deleting contacts from contact list

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, click the required contact list.
4. Click the **Contacts** tab, and under the System Contact ID column, point to the required contact record.

POM displays  for more options.

5. Click  and click **Delete**.
6. In the Delete dialog box, click **Delete**.

Editing contact information

 Note:

You cannot associate empty attribute values. If you edit an attribute and the attribute is not associated with any value, the edited attribute does not appear in the contact browser

 Note:

If you edit the phone attributes and update the phone number for a contact, and want POM to recalculate the time zone associated with the phone number, you must empty the existing time zone value in the respective time zone attribute. To update the country code attribute, you must empty the existing country code value in the respective country code attribute.

If the phone number or the email id of any contact already exists in the DNC list, you can edit all other attributes of that contact except the phone number and the email id.

POM displays the time zones in the Contacts tab using the display names. To add, edit, or import contacts, you must specify the time zone using the time zone IDs. For a complete list of supported time zones, see [Supported time zones](#) on page 432.

For the list of supported time zones for the Advanced Guard Time feature, see [Supported time zone after enabling advanced guard time](#) on page 451.

POM supports G14 languages. For a complete list of supported languages, see [Supported languages](#) on page 43.

*** Note:**

If you use the predefined Language attribute, POM allows only specific values (for example, en-us to specify US English)

About this task

Use this procedure to modify the contact records in a contact list.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, click the required contact list.
4. Click the **Contacts** tab, and under the System Contact ID column, point to the required contact record.

POM displays  for more options.

5. Click  and click **Edit**.
6. After editing the required fields, click **Save**.

Related links

[New Contacts page field descriptions](#) on page 391

Contacts tab field descriptions

Use this tab to view the details of the contacts in a selected contact list. You can view all the contact records for the selected contact list. If the selected contact list has less than 15 attributes, POM displays all the attributes. Otherwise, POM displays only 15 attributes by default. However, you can use  to show or hide any of the attributes.

POM saves your attribute preferences in the local storage and the selection is valid for the active session. If you visit other tabs or pages and return to the Contacts tab, the selected column attributes will be available.

*** Note:**

POM displays the **System Contact ID** attribute by default. Other than **System Contact ID**, POM displays those predefined and custom attributes that you associate with the contact list. For the list of attributes, see [Overview](#) on page 409.

Field or Button	Description
Search Contact	Use to specify a system contact ID to search a contact. For example, you can search for a contact record by creating a set for searching. If you use an attribute salary and the in operator and mention values as 3000, 5000, 8000, then the system searches for salary in 3000, 5000, 8000 and returns the records matching the criteria.

Table continues...

Field or Button	Description
	Use to go to the advanced search option to apply the following filter options: • Column Name: Use the list to select an attribute to search a contact. • Operator: Use the list to select an operator to specify the search criteria. • Search Text: Use to specify the search text according to the selected Column Name and Operator.
	Use to clear the search.
System Contact ID	Displays the unique system generated ID for the contact. Click to edit the contact information.  Note: • The System Contact ID is always displayed as the first column, other columns are displayed depending on the order of the attributes associated with the contact list. • POM displays only the System Contact ID attribute by default. Other than System Contact ID, POM displays only those predefined attributes and custom attributes that you associate with the contact list. • While importing the contact list for the first time the attributes are associated with the list and follow the same order as in which they are added to the contact list. • If you get an Internal Server error while editing the contact information, then the error indicates that POM cannot complete the request before page time out. For this, change the page time out value in the <code>/etc/httpd/conf/httpd.conf</code> file. Restart the <code>httpd</code> and the <code>tomcat</code> service for the changes to take effect.
	Use to display more options such as Edit, Delete. • Edit: Use to edit fields as required. • Delete: Use to delete the contact from the contact list. If the deleted contact is a part of any running campaign, then the status of this contact is updated as Deleted. You can delete unattempted as well as processed contacts from a running campaign.  Note: POM displays  only when you point the mouse over a System Contact ID.

Table continues...

Field or Button	Description
New Contact	Click to add new contact record to the selected contact list. All advanced options, namely Automatically update time zone for phone numbers, Check phone numbers for reject patterns, Check phone numbers for phone formats rule and Check phone numbers / E-mails for DNC, except for Empty Contact List before import are automatically applied when you add a record through the Contacts tab. Do not add records using the Contacts tab if you do not want to apply the advanced options.

 Note:

Only the imported and selected attributes are visible on this page. You must have at least one value for the attribute, else the attribute is not displayed. You can delete a specific contact record from the selected contact list.

POM treats the float type of attributes with a 10-digit precision after decimal. Hence the trailing zeroes will appear in the field values of float type of attributes.

For example: If the attribute value is 123.12, the displayed value on the Contacts tab is 123.1200000000, and If the user input is 123, the displayed value on the Contacts tab and CCW-preview window is 123.0000000000.

 Note:

The users cannot see the value of the attribute for which the **Masked for Users** option is enabled.

To view the detail of an attribute, see [Viewing contact attribute detail](#) on page 427.

Uploading contacts

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, in the **Contact List Name** column, point to the contact list for which you want to upload contacts.

POM displays  for more options.

4. Point to  and click **Upload Contacts**.

POM displays the **Upload Contacts** dialog box.

5. In the **Upload Contacts from following file** area, click **Browse File** to navigate to the location of the .csv file.
6. In the **How are fields separated from each other** area, select a delimiter from the following options:
 - **Comma(,)**

- **Tab**
- **Colon (:)**
- **Semicolon (;)**
- **Pipe(|)**
- **Other (You must type a special character in the field)**

7. In the **What To Do** area, select the option as required:

- Click **Import Contacts** to import contacts from the .csv file into the selected contact list.
- Click **Exclude Contacts** to exclude the contacts from the selected contact list.

 Note:

The following is applicable only if you select the **Exclude Contacts** option.

If you want to exclude contacts for specific number of days, use **EXC_DNC_UNTIL_X_DAYS** column in the file.

For example,

```
ID,EXC_DNC_UNTIL_X_DAYS
1,10
2,5
3,
4,
5,2
```

When datasource configured with this file will run, contact record with ID 1 will be excluded for 10 days, record with ID 2 for 5 days, record with ID 5 for 2 days.

For ID 3 and 4, no value is specified, hence these 2 records will be excluded permanently.

EXC_DNC_UNTIL_X_DAYS column is optional and should be used only if you want to exclude contacts for specific number of days. If this column is not specified in the file then contacts will be excluded permanently.

8. In the **Delete Records Before Import** area, select the options as required:

- Click **Delete All Records** to delete all the contacts from the contact list.
- Click **Delete Records Matching Filter Template** to select a filter template from the drop-down list.

POM deletes the contacts that match the criteria in the filter template.

Click the **Preview** icon to see the contacts that match the filter template and will be deleted.

Records getting deleted will also be removed from running campaigns to which the given contact list is attached. This is particularly helpful for infinite campaigns.

9. Choose the following options as required:

- **Pause Associated Campaigns If Emptying Contact List:** If you select this option, all the running campaigns associated with the contact list pause, the contact list gets emptied, and the paused campaigns resume.



Caution:

It is recommended to not use this option when dialing is in progress. If the campaign jobs fail to pause within a stipulated timeout interval, the campaign jobs might remain in PAUSING/PAUSED state until they are manually resumed.

- **Ignore Active Exclude Contacts If Emptying Contact List:** If you select option, the contact list gets emptied keeping all the active exclude contacts in the contact list.
- **Ignore Callback On Contacts If Emptying Contact List:** If you select this option, the contact list gets emptied, keeping all the callbacks on the contacts in the contact list.

10. In the **Advanced Options** area, select the options as required:

- Click **Automatically update time zone for phone numbers** to automatically update the time zone for the phone numbers depending on the country code specified while entering the phone number in the .csv file.
- Click **Automatically update state for phone numbers** to automatically update the state for the phone numbers depending on the country code specified while entering the phone number in the .csv file.
- Click **Automatically update wireless for phone numbers** to automatically update the wireless field for the phone numbers depending on the country code specified while entering the phone number in the .csv file.
- Click **Check phone numbers for reject patterns** if you do not want to import the contacts with the phone numbers matching the reject patterns.
- Click **Check phone numbers for phone formats rule** if you do not want to import the contacts with the phone numbers not matching the phone formats.
- Click **Check phone numbers/E-Mails for DNC** if you do not want to import the phone numbers or email addresses that are present in the DNC list.



Note:

Addresses added as User Contact ID and Customer ID into the DNC List are not considered in this check.

- Click **Clean up non-numeric characters from phone numbers** if you want to remove the non-numeric characters from the phone numbers when importing the contacts.
- Click **Empty phone on match with reject patterns or phone formats rule** if you want to remove the phone numbers that match the reject patterns and the phone numbers that do not match the phone formats rule when importing the contacts.
- Click **Empty invalid email addresses** if you want to remove the invalid email addresses when importing the contacts.

11. In the **On duplicate record found** area, select an option as required:

- **Update Existing**
- **Ignore New Contact**

12. Click **Upload**.

Upload Contacts page field descriptions

Use this page to upload contacts in the selected contact list or exclude contacts from the selected contact list, using a .csv file.

After uploading contacts, POM automatically creates a data source record. You cannot edit or schedule this data source. You can only delete the data source. POM creates this data source entry for upload contacts.

If the file you upload contains new attributes, POM gives an option to add the new attributes dynamically and continue with upload.

If you add contacts using **Upload** action or through a data source with **File** or **Database** option, POM automatically associates all the attributes with the contact list, including the attributes that have null values in all records. If you are using custom method to upload contacts, then you must manually associate the attributes that have null value.

Note:

To ensure optimum performance and stability of POM, restrictions are imposed on number of parallel imports supported as well as on the number of contacts that can be imported or uploaded into the contact list at a time when POM is under high load. For more information on restrictions on imports, see *Avaya Proactive Outreach Manager Overview and Specification*.

Field or Button	Description
Upload Contacts from following file	Select the path of the file, or click Browse to specify the file from which to import the data.  Note: • If you use Microsoft Edge browser in the Internet Explorer mode, you can type the path of the .csv file. • Maximum allowed file size is 50 MB.

Table continues...

Field or Button	Description
How are fields separated from each other ?	Choose a delimiter to separate the data. In the .csv file, for better readability, the exported data will be separated by the following delimiters: Select one of the following options: • Comma(,) • Tab • Colon(:) • Semicolon(;) • Vertical slash(\) • Other: Type the option in the text box.  Note: If the contact data contains the selected delimiter, then you need to manually append double quotes to the data which has the same delimiters. For example, <pre> Contact List Attributes - id, name, address, age Two contacts are: 1,Alex,'This is my address',45 2,Oanh,'This, is, Jane's, address',35 Now let's consider we have exported this list so that we will get data like below after export, 1,Alex,This is my address,45 2,Oanh,This, is, Jane's, address,35 </pre> The data should be in the following format if it contains the delimiter: 2, Oanh, "This, is, Jane's, address", 35 Note here that the second record contains delimiter(,). Therefore, this data is encapsulated in double quotes (").
What to do	
Import Contacts	Select this check box to import contacts from the .csv file of maximum 50 MB into selected contact list.
Exclude Contacts	Select this check box to exclude contacts from the selected contact list.

Table continues...

Field or Button	Description
Delete Records Before Import	Enable this option to delete the records from the contact list before importing data in the list. When you select this option, the following options are available for selection as required: • Delete All Records If you select this option, POM deletes all the contacts from the contact list. • Delete Records Matching Filter Template If you select this option and then choose a filter template from the drop-down list, POM will delete the contacts that match the criteria that you specify in the Filter Template. Click the Preview  icon to see the contacts that match the filter template that will get deleted. Records getting deleted will also be removed from the running campaigns to which the given contact list is attached. This is particularly helpful for infinite campaigns. • Pause Associated Campaigns If Emptying Contact List: If you select this option, all the running campaigns associated with the contact list pause, the contact list gets emptied, and the paused campaigns resume.  Caution: It is recommended to prohibit using this option when dialing is in progress. If the campaign jobs fail to pause within a stipulated timeout interval, the campaign jobs might remain in PAUSING/PAUSED state until they are manually resumed. If a contact list is associated with a running campaign, POM does not empty the contact list. • Ignore Active Exclude Contacts If Emptying Contact List: If you select this option, the contact list gets emptied keeping all the active exclude contacts in the contact list. • Ignore Callback On Contacts If Emptying Contact List: If you select this option, the contact list gets emptied, keeping all the callbacks on the contacts in the contact list. This option is required if the callbacks are on contacts and you want to empty the contact list. If a contact list contains callbacks and you do not select this option, POM does not empty the contact list.
Advanced Options	

Table continues...

Field or Button	Description
Retain Callback Contacts	This option is enabled only if exclude contacts option is selected. Use this option to allow callbacks to be dialed even if the contact is excluded. By default, this option is disabled. Therefore, callbacks for the contacts are excluded.
Automatically update time zone for phone numbers	Select this check box to automatically update the time zone for the phone numbers depending on the country code specified while entering the phone number in the .csv file.  Note: POM updates the time zone value only if it is not specified by the user. To specify a country code you can use separate field, say, XXXX_ctr_code, where XXXX is the name of the phone number field. Alternatively, In the phone number you can specify the country code before the phone number using Country code separator. For example, if you specify a phone number as 1#4563234545, then 1 is the country code and # is the separator.
Automatically update state for phone numbers	Select this check box to automatically update the state for the phone numbers depending on the country code specified while entering the phone number in the .csv file.  Note: POM updates the state value only if it is not specified by the user.
Automatically update wireless for phone numbers	Select this check box to automatically update the wireless field for the phone numbers depending on the country code specified while entering the phone number in the .csv file.  Note: POM updates the wireless value only if it is not specified by the user.
Check phone numbers for reject patterns	Select this check box if you do not want to import the contacts with the phone numbers matching the reject patterns. The reject patterns are specified in the phone formats under POM Home > Configurations > Phone Formats.
Check phone numbers for phone formats rule	Select this check box if you do not want to import the contacts with the phone numbers not matching the phone formats. The phone formats rules are specified in the phone formats under POM Home > Configurations > Phone Formats.

Table continues...

Field or Button	Description
Check phone numbers/E-Mails for DNC	Select this check box if you do not want to import the phone numbers or email addresses that are present in the DNC list.  Note: Addresses added as User Contact ID and Customer ID into the DNC List are not considered in this check.
Clean up non numeric characters from phone numbers	Select this check box if you want to remove the non-numeric characters from the phone numbers when importing the contacts.
Empty phone on match with reject patterns or phone formats rule	Select this check box if you want to remove the phone numbers that match the reject patterns and the phone numbers that do not match the phone formats rule when importing the contacts.
Empty invalid email addresses	Select this check box if you want to remove the invalid email addresses when importing the contacts.
On duplicate record found	Select one of the following options if a duplicate record is found: • Update existing: To update the existing record. • Ignore new contact: To ignore the new record.
Running Job Association The Running Job Association check box is visible only if you have running campaigns associated with the specific contact list.	
Specify priority for adding uploaded records in running campaigns	Select this check box if you want to specify priority for adding the uploaded records in the campaigns that are currently active. If you select this option and click Upload, the Running Job Association page opens. Use this page to configure the priority for adding the uploaded records in running campaigns.
Upload	Click to upload the contact data to the selected contact list. On upload, if you select the Specify priority for adding uploaded records, you can configure the Running job associations on the following page. If you do not select the check box, the uploaded contacts are added with Medium priority, to the campaigns associated with the contact list.  Note: All newly uploaded contacts are added to the jobs only if they satisfy the filter criteria.

Emptying a contact list

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, under the **Contact List Name** column, point to the contact list you want to empty.

POM displays  for more options.

4. Point to  and click **Empty Contact List**.

POM displays the Empty Contact List dialog box.

5. In the Empty Contact List dialog box, choose from the following options as required:

- **Pause Associated Campaigns:** If you select this option, all the running campaigns associated with the contact list pause, the contact list gets emptied, and the paused campaigns resume.



Caution:

It is recommended to not use this option when dialing is in progress. If the campaign jobs fail to pause within a stipulated timeout interval, the campaign jobs might remain in PAUSING/PAUSED state until they are manually resumed.

- **Ignore Active Exclude Contacts:** If you select option, the contact list gets emptied keeping all the active exclude contacts in the contact list.
- **Ignore Callback On Contacts:** If you select this option, the contact list gets emptied, keeping all the callbacks on the contacts in the contact list.

6. To confirm emptying the contact list, click **Yes**, or to cancel the emptying and return to the Contact Lists page click **Cancel**.

After you click **Yes**, POM displays the following message:

Created a job to delete <number of contacts> records from this Contact List.



Note:

If you empty a contact list while importing the list, POM deletes the callbacks.

If you configure advanced area code configurations, ensure that you delete all the callbacks from the callback manager.

Contact exclusion

You can exclude contact records of a contact list from processing.

The contacts marked as excluded are not picked for processing through the new campaigns started after the exclusion.

In a running campaign, the contacts that are not yet processed and marked as excluded, POM removes the contacts from the contact list of that campaign. POM does not immediately exclude the contacts if the processing is in progress or if the contacts are marked for a callback or retry. Such contacts are marked as excluded at the time of the next processing attempt.

For example, a contact list associated with a running campaign has 10 contacts, and five contacts are already picked up for processing. If you exclude all the contacts in this contact list, POM excludes and removes only the five contacts that are not yet picked up for processing, but POM continues processing the other five contacts that are already picked up for processing.

For example, a contact list associated with a running campaign has 10 contacts, and five contacts are marked for Callback or Retry. When the callback or retry time for the contacts occurs, POM checks if these contacts are marked as excluded. If the contacts are excluded, POM does not pick these contacts for processing. POM Dashboard does not reduce the count of un-attempted Contacts. The campaign job runs till the callback or retry occurs.

To attempt the processing the excluded contacts, remove these contacts from the exclusion list.

Excluding contacts from a contact list

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, under the **Contact List Name** column, click the required contact list.
4. Click the **Excluded Contacts** tab, and click **Add**.
5. In the **Exclude for Days** field, type the number of days for which you want POM to exclude contacts from the contact list.

If you do not specify the number of days, then POM marks the contact record as excluded permanently.
6. In the **Exclusion Filter Criteria** area, click **Add Condition**, and specify the following fields:
 - a. **Contact Attribute**
 - b. **Operator**
 - c. **Value**: To add a value do either of the following:
 - In **Value**, type the value.
 - Click  and in the **Input Criteria** dialog box, select the required option from **Available Values** list and click **Apply**.
7. If you add more than one condition, specify the required option in **Show Contacts**.
8. Click **Filter contacts** to filter the contacts based on the criteria.
9. Click **Save**.

Related links

[Add Excluded Contacts page field descriptions](#) on page 404

Add Excluded Contacts page field descriptions

Use this page to add the filter criteria for contacts that you want to exclude for dialing.

Field or Button	Description
Name	Displays the contact list name.
Exclude for Days	Use to specify the number of days for which POM excludes a contact record from getting dialed. The valid range for Exclude for Days is from 1 to 999.  Note: Exclusion period is calculated based on the local time of the POM server. For example, if the user specifies 1 day in the Exclude for days field, then POM excludes the record until midnight of the local time on the POM server. After midnight, the record is available for dialing.
Exclusion Filter Criteria	
Add Condition	Use to specify the conditions for filtering the contact records for exclusion. You can see the following fields: • Condition: Displays the serial number of the conditions. • Contact Attribute: Specify the contact attribute to use to filter the records using the list. • Operator: Specify the operator to use with the contact attribute to filter the records. You can use =, !=, >=, <=, >, <, in, between, not between, isNull, and is not null, depending on the data type of the attribute you select. - For multi character wild card support, use % (percentage). Multi character wild card is supported only with Like and NotLike operators. - For single character wild card support, use _ (underscore). Single character wild card is supported only with Like and NotLike operators. For example, if customer names in the contact list are Avaya, Avasa, Asurian and the selection criteria is Ava_a, then only 2 records namely "Avaya" and "Avasa" are selected. • Value: Specify the value to use to filter the records. POM displays the first 100 matching values. For example, if you are filtering records with last name containing "Wa", POM displays the first 100 records which have the last names containing "Wa".  Note: If you specify more than one attributes, POM filters the contacts according to the order in which you specify the filters. For example, you select the ID and the first name attribute. If you mention the filtering criteria as ID=10 and name equal to John, POM displays all values which match both the conditions.

Table continues...

Field or Button	Description
Show Contacts	Use to specify the following condition options if you add more than one condition: • All of the conditions below are met: Use to apply the filter based on all the conditions that you add. • Any of the conditions below are met: Use to apply the filter based on one of the conditions that you add. • custom: You can set a custom combination of the required conditions that you add.
Filter Contacts	Use to filter the contacts based on the added conditions.
The number of Contacts filtered are <n>	Displays the number of filtered contacts.
Action	•  - Use to go to the Input Criteria dialog box to select a value from the Available Values list. POM displays the first 1000 matching values. In the Input Criteria dialog box, the Column field displays the contact attribute, and the Column type displays the attribute data type. •  - Use to delete the filter criteria.
	Use to display the detail of the filtered contacts.
Save	Use to save the changes.
Cancel	Use to cancel the procedure and return to the previous page.

Related links

[Excluding contacts from a contact list](#) on page 404

Excluded Contacts page field descriptions

Use Excluded contacts page to view the contacts that are excluded from dialing. If a contact is already picked up for dialing and then excluded, and if the excluded contact is not yet dialed, then it is removed from the contact list of the running campaigns. However, campaign manager does not exclude the contacts if dialing of those contacts is in progress or if they are marked for callback or retry. For more information about excluded contacts, see *Avaya Proactive Outreach Manager Overview and Specification*.

If the selected contact list has less than 15 attributes, POM displays all the attributes. Otherwise, POM displays only 15 attributes by default. However, you can use  to show or hide any of the attributes.

POM saves your attribute preferences in the local storage and the selection is valid for the active session. If you visit other tabs or pages and return to the Excluded Contacts tab, the selected column attributes will be available.

 Note:

POM displays only the **System Contact ID** attribute by default. Other than **System Contact ID**, POM displays only those predefined attributes and custom attributes that you associate with the contact list. For the list of attributes, see [Overview](#) on page 409.

Field or Button	Description
Search Contact	Use to specify a system contact ID to search a contact. For example, you can search for a contact record by creating a set for searching. If you use an attribute salary and the in operator and mention values as 3000, 5000, 8000, then the system searches for salary in 3000, 5000, 8000 and returns the records matching the criteria.
	Use to go to the advanced search option to apply the following filter options: • Column Name: Use the list to select an attribute to search a contact. • Operator: Use the list to select an operator to specify the search criteria. • Search Text: Use to specify the search text according to the selected Column Name and Operator.
	Use to clear the search.
System Contact ID	Displays the unique system-generated ID for a contact. Click to edit the contact information.  Note: • In the Contacts, System Contact ID is displayed as the first column, other columns are displayed depending on the order of the attributes associated with the contact list. • POM displays only the System Contact ID attribute by default. Other than System Contact ID, POM displays only those predefined attributes and custom attributes that you associate with the contact list. • While importing the contact list for the first time the attributes are associated with the list and follow the same order as in which they are added to the contact list. • If you get an Internal Server error while editing the contact information, then the error indicates that POM cannot complete the request before page time out. For this, change the page time out value in the <code>/etc/httpd/conf/httpd.conf</code> file. Restart the <code>httpd</code> and the <code>tomcat</code> service for the changes to take effect.
Exclude Until	Displays the date and time until which the contact record is marked as excluded. If the contact record is excluded permanently, then this field would be blank.

Table continues...

Field or Button	Description
Actions 	Use to display more options such as Edit and Delete. POM displays  when you point the mouse over a contact id area. • Edit: Use to edit the excluded contact list. • Delete: Use to remove a contact from the excluded contact list. When you delete a contact from excluded contacts list, the contact becomes available for dialing. • Add: Click to add new contact record to be excluded from the contact list. • Reset: Use to reset all contacts from excluded contacts list. When you click the Reset button, all the contacts that were excluded become available for dialing.

Marking contacts as Callable

About this task

Use this procedure to enable POM to remove contacts from the exclusion list and make the contacts available for dialing.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, under the **Contact List Name** column, click the required contact list.
4. Click the **Excluded Contacts** tab, and do one of the following as required:
 - To mark an individual contact as Callable, under the **System Contact ID** column, point to the required contact, click  and click **Delete**, and in the Delete dialog box, click **Delete**.
 - To mark all the excluded contacts as Callable, click **Reset**.

Note:

When you click **Reset**, POM removes all the contacts from the exclusion list and makes them available for dialing.

Deleting a contact list

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Lists**.
3. On the Contact Lists page, under the **Contact List Name** column, point to the required contact list.

POM displays  for more options.

4. Point to  and click **Delete**, and click **Yes** to confirm deleting.

POM displays the following message: `Contact List deleted successfully.`

 Note:

You cannot delete a contact list if the list is associated with a campaign or it has any data sources.

If you created a contact list by using the **Browse File** option, you must first delete the data source and then delete the contact list.

If an administrator want to delete a contact list that is created by another Org administrator, the administrator must de-associate the organization from that contact list and then delete the contact list.

Contact Attributes

Overview

Contact attributes are properties of contact data. You can filter contact data based on contact attributes.

The following are the two types of contact attributes:

- **Predefined Attributes**
- **Custom Attributes**

Predefined Attributes

Predefined attributes are the built-in attributes. These attributes are most commonly used attributes and are grouped together. The predefined attributes are of the following two types:

- System attributes with the system-generated values: The values are generated by POM.
- System attributes with user-defined values: The users need to specify the value.

Table 2: System attributes with the system-generated values

Attribute name	Description	Attribute name to be used in import file header	Attribute name to be used in Web Service
Added On	The time when a new contact was imported, uploaded, or added into a contact list.  Note: The value of the addedOn attribute for all the contacts imported earlier to POM 4.0.2 Service Pack 3 will be set to the time of upgrade to POM 4.0.2 Service Pack 3.	-	addedOn
Counter	The number of times the contact has been successfully attempted.	-	counter
Last Modified On	The last time when the contact was modified.	-	lastModifiedOn
Last Address Dialed Attribute Name	The attribute name of the address by which the contact was last dialed.	-	lastAddrDialedAttrName
Last Handled By Agent ID	The Agent ID of the agent who last handled the contact.	-	lastHandledByAgentId
Last Nuisance Call Time	The last time when the contact was in a nuisance call.	-	lastNuisanceCallTime
Last Attempt Time	The last time when the contact was attempted.	-	-
Last Successful Attempt Time	The last time when the contact attempt was successful.	-	-
Last Completion Code	The last completion code of the contact.	-	-

Table 3: System attributes with user-defined values

Attribute name	Description	Attribute name to be used in import file header	Attribute name to be used in Web Service
ID	The unique identification for the contact. Id is a mandatory attribute. * Note: Id must be the first attribute to be mentioned in the .csv file.	Id	userContactID
Title Predefined	The salutation that is used before the first name of the contact. For example, Mr, Mrs., Dr.	titlepredefined	title
First Name	The first name of the contact. * Note: POM Campaign Detail report displays this attribute value for the user to identify the contact.	firstname	firstName
Last Name	The last name of the contact. * Note: POM Campaign Detail report displays this attribute value for the user to identify the contact.	lastname	lastName
Address Line 1 Predefined	The address of the contact.	addrline1predefined	addressLine1
Address Line 2 Predefined	The address of the contact.	addrline2predefined	addressLine2
Address Line 3 Predefined	The address of the contact.	addrline3predefined	addressLine3
Address Line 4 Predefined	The address of the contact.	addrline4predefined	addressLine4
Address Line 5 Predefined	The address of the contact.	addrline5predefined	addressLine5
Phone 1	The phone number of the contact.	phonenum1	phoneNumber1
Phone 1 Country Code	The country code associated with the Phone 1 attribute.	phonenum1ctrycode	phoneNumber1CtryCode
Phone 1 State	The state associated with the Phone 1 attribute.	phonenum1state	phoneNumber1State
Phone 1 Wireless	Indicates whether the Phone 1 attribute is of a wireless phone.	phonenum1wireless	phoneNumber1Wireless

Table continues...

Attribute name	Description	Attribute name to be used in import file header	Attribute name to be used in Web Service
Time Zone	The time zone associated with the Phone 1 attribute.	timezone	phoneNumber1TimeZo ne

Table continues...

Attribute name	Description	Attribute name to be used in import file header	Attribute name to be used in Web Service
Phone 1 Allowed Time	Use this attribute to specify specific hours and days of the week during which phone 1 can be dialed. For example, your customer allows you to call on phone 1 only during specific hours and days of the week. Use the following example format to specify the allowed time: 0-6.12:00.18:00 Where: • 0-6 represent days of the week. Where, 0 represents Sunday and 6 represents Saturday. • 12:00 represents the beginning of the allowed time. • 18:00 represents the end of the allowed time. Hence, in the preceding example, the allowed time for phone 1 is from Sunday through Saturday from 12:00 to 18:00. To specify different allowed times for different days of the week, use a space as a separator. Example 1: 1-5.10:00.16:00 6.12:00.14:00 0.10:00.11:00 In the preceding example, the allowed time to dial phone 1 is: • Monday through Friday from 10:00 to 16:00. • Saturday from 12:00 to 14:00. • Sunday from 10:00 to 11:00. Example 2: 1-5.10:00.16:00 3.17:00.18:00	phonenumber1allowe dtime	phoneNumber1Allowed Time

Table continues...

Attribute name	Description	Attribute name to be used in import file header	Attribute name to be used in Web Service
	In the preceding example, the allowed time to dial phone 1 is: - Monday, Tuesday, Thursday, and Friday from 10:00 to 16:00. - Because the allowed time for Wednesday is defined twice, the allowed time for Wednesday is 10:00 to 16:00 and 17:00 to 18:00. You can specify a maximum of four allowed times per day for a phone attribute.  Note: The number of allowed times per day of a phone attribute affects the time required for filtering the records. The default allowed time is 00:00 to 23:59. POM uses the allowed time information to derive a guard time for phone 1 if the User Preferred Time option is enabled on the Campaign Creation page. For more information, see Advanced guard time with follow-the-sun dialing on page 111.		

Table continues...

Attribute name	Description	Attribute name to be used in import file header	Attribute name to be used in Web Service
Phone 1 Disallowed Time	Use this attribute to specify specific hours and days of the week during which phone 1 cannot be dialed. For example, your customer does not want to be called on phone 1 during specific hours and days of the week. Use the following example format to specify the disallowed time: 0-6.19:00.23:59 Where: • 0-6 represent days of the week. Where, 0 represents Sunday and 6 represents Saturday. • 19:00 represents the beginning of the disallowed time. • 23:59 represents the end of the disallowed time. Hence, in the preceding example, the disallowed time to dial phone 1 is from Sunday through Saturday from 19:00 to 23:59. To specify different disallowed times for different days of the week, use a space as a separator. Example 1: 1-5.18:00.23:59 6.14:00.23:59 0.9:00.23:59 In the preceding example, the disallowed time to dial phone 1 is: • Monday through Friday from 18:00 to 23:59. • Saturday from 14:00 to 23:59. • Sunday from 9:00 to 23:59. Example 2: 1-5.18:00.23:59 3.9:00.10:00	phonenumber1disallowedtime	phoneNumber1DisAllowedTime

Table continues...

Attribute name	Description	Attribute name to be used in import file header	Attribute name to be used in Web Service
	In the preceding example, the disallowed time to dial phone 1 is: - Monday, Tuesday, Thursday, and Friday from 18:00 to 23:59. - Because the disallowed time for Wednesday is defined twice, the disallowed time for Wednesday is 9:00 to 10:00 and 18:00 to 23:59. You can specify a maximum of four disallowed times per day for a phone attribute.  Note: The number of disallowed times per day of a phone attribute affects the time required for filtering the records. The default disallowed time is Null. POM uses the disallowed time information to derive a guard time for phone 1 if the User Preferred Time option is enabled on the Campaign Creation page.		
Phone 2	The secondary phone number of the contact.	phonenum2	phoneNumber2
Phone 2 Country Code	The country code associated with the Phone 2 attribute.	phonenum2ctrycode	phoneNumber2CtryCode
Phone 2 State	The state associated with the Phone 2 attribute.	phonenum2state	phoneNumber2State
Phone 2 Wireless	Indicates whether the Phone 2 attribute is of a wireless phone.	phonenum2wireless	phoneNumber2Wireless
Phone 2 Time Zone	The time zone associated with the Phone 2 attribute.	phonenum2tz	phoneNumber2TimeZone

Table continues...

Attribute name	Description	Attribute name to be used in import file header	Attribute name to be used in Web Service
Phone 2 Allowed Time	Use this attribute to specify specific hours and days of the week during which phone 2 can be dialed. For more information about the allowed time format, see the description for the Phone 1 Allowed Time attribute. POM uses the allowed time information to derive a guard time for phone 2 if the User Preferred Time option is enabled on the Campaign Creation page.	phonenum2allowe dtime	phoneNumber2Allowed Time
Phone 2 Disallowed Time	Use this attribute to specify specific hours and days of the week during which phone 2 cannot be dialed. For more information about the disallowed time format, see the description for the Phone 1 Disallowed Time attribute. POM uses the disallowed time information to derive a guard time for phone 2 if the User Preferred Time option is enabled on the Campaign Creation page.	phonenum2disallo wedtime	phoneNumber2DisAllo wedTime
E-mail	The email address of the contact.	email	email
Language	The default language associated with the contact.	language	language
Country Predefined	The country of residence associated with the contact.	countrypredefined	country
System AgentID	System Attribute that you can use as per your requirement. You can also use this attribute if users face performance issues with any custom attribute for "Get Contact Batch from Contact List API".	sysAgentId	sysAgentId
Zip Code Predefined	The primary zip code associated with the contact record.	zipcodepredefined	zipcode

Table continues...

Attribute name	Description	Attribute name to be used in import file header	Attribute name to be used in Web Service
Zipcode Time Zone Predefined	Use this attribute to specify the time zone of the primary zip code. POM uses the time zone information of the zip code to derive a zip code-based guard time for the record if the Timezone of Zipcode option is enabled on the Campaign Creation page. For more information, see Advanced guard time with follow-the-sun dialing on page 111.	zipcodetzpredefined	zipcodeTzPredefined
Zipcode State Predefined	Use this attribute to specify the state of the primary zip code. POM uses the state of the zip code to derive a zip code-based guard time for the record if the Timezone of Zipcode option is enabled on the Campaign Creation page.	zipcodestatepredefined	zipcodeStatePredefined
Zipcode1 Predefined	Use this attribute to specify the secondary zip code associated with the contact record.	zipcode1predefined	zipcode1Predefined
Zipcode1 Time Zone Predefined	Use this attribute to specify the time zone of the secondary zip code. POM uses the time zone information of the zip code1 to derive a zip code1-based guard time for the record if the Timezone of Zipcode option is enabled on the Campaign Creation page.	zipcode1tzpredefined	zipcode1TzPredefined
Zipcode 1 State Predefined	Use this attribute to specify the state of the secondary zip code. POM uses the state of zip code1 to derive a zip code1-based guard time for the record if the Timezone of Zipcode option is enabled on the Campaign Creation page.	zipcode1statepredefined	zipcode1StatePredefined

 Note:

Predefined attributes are not mandatory attributes while importing. Only the ID attribute is mandatory. POM internally updates the Last Successful Attempt Time, Last Attempt Time, and Last Completion Code attributes, and these attributes are not visible from the contact browser.

Custom Attributes

You can create and add Custom Attributes to a contact list as required.

To specify the values for the language attribute, refer [Supported Input languages](#) on page 431 for the allowed values.

To specify values for the time zone attributes, refer [Supported time zones](#) on page 432.

For the list of supported time zones for the Advanced Guard Time feature, see [Supported time zone after enabling advanced guard time](#) on page 451.

You can limit the access to attributes from specific organizations by marking the attributes as private or public. For example, you can mark the salary attribute as a private attribute and assign it to an organization.

The attributes created by an Org user are associated only with creator's organization. For example, a user Joe belonging to the Sales organization (Sales/Joe) creates a custom attribute CustomerType. This custom attribute is visible only to Sales organization.

A global user can create custom attributes and can mark them as private. The global user can associate such private attributes with one or more organizations. The global administrator can create a private custom attribute salary and give explicit permission to HR, and Finance organization to access this attribute.

Predefined attributes of a contact, such as Phone 1 and Last Name, are global and are accessible to all organization users. The global user has access to all attributes. For an organization user, the private contact attributes associated to the user's organization, and all public attributes, are accessible while creating campaigns, creating campaign strategies, and creating data sources.

 Note:

A global user does not belong to any organization, and has the POM Administration and POM Campaign Manager roles. An organization user (Org user) belongs to an organization created in Voice Portal or Avaya Experience Portal, and has the Org POM Campaign Manager role.

Adding contact attributes

About this task

Use this procedure to add new contact attributes to your POM system.

 Note:

While adding attributes, you might get an internal server error indicating that POM cannot complete the request before the page times out. To avoid the error, change the page timeout value in the `/etc/httpd/conf/httpd.conf` file, and restart the `httpd` and Tomcat services.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Attributes**.
3. On the Contact Attributes page, click **New Attributes**.
4. On the New Attribute page, add relevant information and click **Save**.

Related links

[New / Edit Attributes page field descriptions](#) on page 420

New / Edit Attributes page field descriptions

POM supports a maximum of 900 attributes. The total count of attributes is the sum of the number of pre-defined and custom attributes on your POM system.

Field or Button	Description
Attribute Name	A unique identifier for the attribute. The following special characters are not allowed while specifying the attribute name: space, ^, @, ~, ` , !, ' , " , ; , # , \ , \$, % , & ,) , (, ? , > , < ,] , [, : , * , + , = , - , and comma (,) The maximum length is 30 characters. Ensure that the attribute name does not start with a numeric character. For example, you cannot have an attribute name such as "1firstName". You cannot edit this field after you save the attribute. Ensure that the attribute name does not match with the reserved word in all the supported databases (MS SQL, POSTGRES, and ORACLE)
Data Type	Use the list to assign the attribute type. For attribute fields having String data type, special characters are allowed except single quote (') in the data source. POM rejects the record if there are special characters in an attribute having data type other than String and Character. If double quotes is a part of data, you must use (") as an escape character, and if the character is used as a field separator as a part of the data, you must enclose it in double quotes. For example: Avaya, Tower "XI", Pune, India must be written as "Avaya, Tower ""XI"" , Pune, India".  Note: You cannot edit this field after you save the attribute.
Private	Use selection box to make the attribute private. This is an optional field. For example, if an HR organization creates a salary attribute, this attribute is private to the HR organization, by default. If a global user creates a salary attribute, the global user can set this attribute as private. If you set the attribute to private, no organization can use this attribute. The global user can then associate the salary attribute with one or more than one organizations, and only the associated organizations can use the attribute. If the attribute is not private, all organization users can use it. The global user can get access to all attributes, regardless of the privacy setting.  Note: You see the selection check box only if you enable organizations. For more information about organizations, see the <i>Administering Avaya Proactive Outreach Manager</i> guide.

Table continues...

Field or Button	Description
Read Only for Agents	Use this selection box to mark an attribute as read only for agents. For example, if you configure an attribute as read-only, the agent can only see the attribute value but cannot change its value from the agent desktop. The agents cannot change the value of the attributes which are marked as Read Only for agents from the agent desktop. This is an optional field.  Note: If you mark any attribute as read only for a running campaign, it appears as read only on the desktop from the next contact record.
Masked for Agents	If you enable this option, the agents cannot see the attribute value on the desktop. For example, you can use this option to mask the salary details attribute. This is an optional field.  Note: If you mark any attribute as masked for a running campaign, the attribute appears as masked on the desktop from the next contact record.
Masked for Users	If you enable this option, the users cannot see the attribute value. This is an optional field.
Add Attribute	Use to add more rows to add more attribute. At a time, you can add a maximum number of 50 rows to add attributes.
	Use to delete a row used to add an attribute.
Save	Use to save the attributes.
Cancel	Use to cancel the procedure.

Related links

[Adding contact attributes](#) on page 419

Contact Attributes page field descriptions

This page displays the list of contact attributes. Depending on your user role, you can add, change, and delete the attributes. You can generate a `.csv` template. If multi-tenancy is enabled, you can associate the attributes with specific organizations.

Field or Button	Description
Search Attributes	Use to specify the name of the attribute to search. Attribute search criteria is not case sensitive and does not support the use of regular expression.
You see the following advanced-search options when you click the filter icon 	

Table continues...

Field or Button	Description
Column Name	Use the list to choose one of the following search criteria: • Name • Type • Data Type • Private • Read Only for Agents • Masked for Agents • Masked for Users • Allowed Organizations
Operator	Use the list to specify the operator to specify the search criteria. You can use only the equal to (=) operator for Data Type, Private, Read Only for agents, and Masked for agents. If you select Name, you can use one of the following options: • Equal to (=) • Not Equal to (!=) • in • like • notlike For example, you can search for a name attribute where name is not equal to currency. Also, you can search for a private attribute = Yes. The system returns all attributes marked Private.

Table continues...

Field or Button	Description
Search Text	Use to specify the text if you select Name in Column Name. Also, use this to specify either Yes or No only for Private, Read Only for Agents, and Masked for Agents. If you select data type, you can specify one of the following data types: • INTEGER • LONG • FLOAT • SHORT • CHARACTER • BOOLEAN • STRING • PHONE • EMAIL • DATE • TIME • TIMESTAMP
	Use to clear the search.
Selection check box	Use the selection check box to select the attributes for exporting the attributes in the .csv template.
Name	Displays the names of existing attributes, both the predefined, and custom attributes.  Note: If you are using a non-English language, the attribute name is displayed in the specified language, but while importing, you must specify the value in English. For example, if you use Chinese for First Name attribute, you can see the attribute name in Chinese, but when you specify the attribute in a file, you must specify the attribute names as firstname in English.
Type	Displays the attribute type as predefined or custom.

Table continues...

Field or Button	Description
Data Type	Displays the data type of the attribute. The minimum and the maximum values for each data type are: • INTEGER: The minimum value is -2,147,483,648, and the maximum value is 2,147,483,647 (both values inclusive). • LONG: The minimum value is -9,223,372,036,854,775,808, and the maximum value is 9,223,372,036,854,775,807 (both values inclusive). • SHORT: The minimum value is -32,768, and the maximum value is 32,767 (both values inclusive). • CHARACTER: A single character is allowed. • FLOAT: 28 precision and 10 scale. This means 28 characters before the decimal and 10 characters after the decimal point.  Note: You cannot enter a float value as a combination on numbers and alphabets. For example, 123.4f is not a valid float value. • BOOLEAN: The allowed values are TRUE and FALSE, or YES and NO, or T and F, or Y and N, or 0 and 1. • STRING: Any string up to 3990 characters. • PHONE: Valid phone number up to 80 characters. POM has two predefined attributes for specifying the phone number such as Phone 1 and Phone 2. Use this to specify an additional phone number. When you add a phone attribute, POM adds six child attributes. For example, if you add a phone attribute and the name of the attribute is xyz, the following attributes gets added: - xyz_etry_code - xyz_tz - xyz_state - xyz_wireless - xyz_allowedtime - xyz_disallowedtime • EMAIL: Any string up to 80 characters in a valid email format. • DATE: Date in the valid format.  Note: Specify the date in the format specified in the Global date format field on the Global Configurations page under Manager > Configurations > Global Configurations.

Table continues...

Field or Button	Description
	For example, to specify a custom attribute, Date_Of_Birth, then use the Date data type. • TIME: Time in the valid format.  Note: Specify the time in the format specified in the Global date format field on the Global Configurations page under Manager > Configurations > Global Configurations. For example, to specify a custom attribute, Delivery_Time, then use the Time data type. • TIMESTAMP: Timestamp in the valid format.  Note: Specify the timestamp in the format specified in the Global date format field on the Global Configurations page under Manager > Configurations > Global Configurations. For example, to specify a custom attribute, Schedule, then use the Timestamp field. If you specify the Global Date Format as DD-MM-YYYY hh:mm:ss, then the valid date format considers DD-MM-YYYY, the valid time format considers hh:mm:ss, and the valid timestamp considers DD:MM:YYYY hh:mm:ss.
Private	Displays whether the attribute is private. You can use this to restrict access to attributes such as salary. For example, if an HR creates a salary attribute, the attribute is Private to the HR organization by default. If a global user creates a salary attribute, the global user can mark the attribute as Private. If marked as Private, no organization can use this attribute, until you associate the attribute with some organization. The global user can associate the salary attribute with one or multiple organizations, and only the associated organizations can use the attribute. If the attribute is not marked as private, all organization users can use it. The global user can access all attributes regardless of the privacy setting.
Read Only for Agents	Displays if the attribute is read-only for the logged in agents.
Masked for Agents	Displays if the attribute is masked. If the attribute is masked, the logged in agents cannot see the attribute value.  Note: If you mark any attribute as masked for a running campaign, pause and resume the campaign so that the attribute displays as masked on the desktop.
Masked for Users	Displays if the option is enabled for the attribute. If the option is enabled, the logged in users cannot see the value of the attribute for which the masked for users option is enabled.
 Note:	If you turn on multi-tenancy, you see the Allowed Organizations field. For more information about multi-tenancy, see the <i>Administering Avaya Experience Portal</i> guide.

Table continues...

Field or Button	Description
Allowed Organizations	Lists the different organizations to which the attributes are associated.
Actions	You can perform the following actions only for the custom attributes: - Use  to view more options such as Detail, Edit, Associate to Organization, and Delete.  Note: POM displays  when you point the mouse over an attribute name. - Click Detail to view the detail of an attribute. - Click Associate to Organization to associate the attribute with an organization.  Note: The Associate to Organization option is available if you select the Private option when you create an attribute. - Click Edit to change the properties of an attribute. - Click Delete to delete the attribute.  Note: You cannot delete an attribute in the following scenarios: - If the attribute is associated with any of the filtering criteria of a campaign. - If the attribute is used in a database-based import. - If the attribute is used in a campaign strategy or rule. If the attribute is marked as private, the users belonging to that organization can delete the attribute when no other organization uses the attribute.
New Attributes	Use this to add new attributes. POM supports the addition of maximum 900 attributes. The total number of attributes is the sum of the pre-defined and the custom attributes on the system. On the New Attributes page, you can add up to 50 rows at once using Add Attribute.  Note: For every phone-type attribute, POM creates seven additional attributes. Out of those seven attributes, two attributes are created for timezone, one attribute each for country code, state, wireless, allowed time, and disallowed time. One of the timezone attributes is for internal use and POM does not display this attribute on the POM User Interface. POM counts this attribute while calculating the total attributes on your POM system.

Table continues...

Field or Button	Description
Generate CSV Template	Use this to generate a .csv template. If you open the file in MS Excel, you need to save the file as a .csv file. You can create this template by selecting the listed attributes. You can view the predefined attributes and choose to add the predefined or the custom attributes. You can choose to either open the file or save the file.  Note: When you edit the .csv file in excel, make sure that attribute values are not altered by MS Excel. You can use this .csv file during the contact data import using the Browse File option. You can import files having either ANSI or UTF-8 w/o BOM format.

Editing contact attributes

About this task

Use this page to change the properties of contact attributes. You can edit the Read only or Masked status of attributes or mark the attribute as private when multi-tenancy is enabled on Avaya Experience Portal. For more information about multiteneancy, see the *Administering Avaya Experience Portal* guide.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Attributes**.
3. On the Contact Attributes page, do one of the following:
 - Under the **Name** column, click the attribute to change the required fields.
 - Under the **Name** column, point to the required attribute and click  and click **Edit** to change the required fields.

 Note:

You cannot edit the **Attribute Name** and **Attribute Data Type**.

4. Click **Save** to update the attribute.

Related links

[New / Edit Attributes page field descriptions](#) on page 420

Viewing contact attribute detail

About this task

Use this procedure to view the detail of contact attributes.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.

2. On the **Contacts** menu, click **Contact Attributes**.
3. On the Contact Attributes page, under the **Name** column, point to the required attribute and click  and click **Detail** to view the attribute properties.

Related links

[Attribute detail page field descriptions](#) on page 428

Attribute detail page field descriptions

Use this page to view the details of the contact attributes. POM displays an attribute detail page when you click on an attribute. An attribute detail page displays information based on the values you select when you add or edit an attribute.

Field or Button	Description
Attribute Name	Displays the attribute name.
Attribute Data Type	Displays the attribute data type.
Private	Displays if the attribute is private or public. If the value is no, the attribute is public.
Read Only for Agents	Displays if the attribute is a read-only attribute. The agents cannot change the value of the attributes which are marked as Read Only for agents from the agent desktop.
Masked for Agents	Displays if the agents cannot see the attribute value on the desktop.
Masked for Users	Displays if the users cannot see the value of the attribute.
Attribute Organizations	Displays the organizations associated with the attribute.
Attribute used in Contact Data Source	Displays the database data sources associated with the attribute.  Note: Only if you import the attribute using database, this field shows the data source name from where it is imported. In all other cases, the system displays the message <code>No Contact Data Source is associated with this attribute.</code>
Attribute used in Campaign	Displays the campaign name associated with the attribute.
Attribute used in Campaign Strategy	Displays the campaign strategy associated with the attribute.
Used in Campaign Restrictions	This field is obsolete.
Attribute used in Agent Scripts	Displays whether the attribute is used in agent scripts.

Related links

[Viewing contact attribute detail](#) on page 427

Generating a CSV template**About this task**

Use this procedure to download a `.csv` template. Use this `.csv` file to import the contact data with the **Browse File** option. You can import files with ANSI or UTF-8 without BOM format.

You can use the `.csv` template to store contact records. You can also use the template to import records into the POM database.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Attributes**.
3. On the Contact Attributes page, click **Generate CSV Template**.

Associating contact attributes with organization**About this task**

Use this procedure to associate contact attributes with one or multiple organizations available on your POM system.

*** Note:**

You can associate attributes with organizations if you select the **Private** option when you create an attribute.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Attributes**.
3. On the Contact Attributes page, under the **Name** column, point to the required attribute and click  and click **Associate to Organization**.

*** Note:**

The **Associate to Organization** option is available if you select the **Private** option when you create an attribute.

4. In the Organization Association dialog box, select the organizations as required and, click **Save**.

Related links

[Organization Association dialog box field descriptions](#) on page 430

Organization Association dialog box field descriptions

Use this page to associate contact attributes with the available organizations.

Field or Button	Description
Allowed Organizations	Displays the list of the organizations.
Save	Use to save the changes.
Cancel	Use to cancel the procedure.

Related links

[Associating contact attributes with organization](#) on page 429

Deleting contact attributes

About this task

Use this procedure to delete the custom contact attributes. You cannot delete the predefined contact attributes.

Note:

You cannot delete an attribute in the following scenarios:

- If the attribute is associated with a filter template.
- If the attribute is used in a database-based import.
- If the attribute is used in a campaign strategy, rule, or agent script.

If an attribute is marked as private, a user from that organization can delete the attribute when no other organization uses the attribute.

A global user can delete the custom attributes belonging to any organization if the attribute is not used in any filtering criteria or associated with the database import. You cannot delete an attribute if it is a part of a running import.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Contact Attributes**.
3. On the Contact Attributes page, point to the required attribute.
POM displays  for more options.
4. Click  and click **Delete**.
5. In the Delete dialog box, click **Delete**.

Supported Input languages

Avaya Proactive Outreach Manager supports the following languages for input:

- Mandarin Chinese
- English (U.S.A)
- English (U.K)
- French (Canada)
- German (Germany)
- Japanese
- Spanish (Latin America)
- Canadian French
- French (France)
- US English
- Castilian Spanish
- Latin American Spanish
- Canadian French
- French
- Greek (Greece)
- Italian (Italy)
- Portuguese (Portugal)
- Portuguese (Brazil)
- Russian (Russia)
- Spanish (Spain)
- Spanish (Colombia)
- Spanish (Argentina)
- Spanish (Chile)
- Spanish (U.S.A)
- Swedish (Sweden)
- Arabic (Worldwide)
- Basque (Spain)
- Bulgarian (Bulgaria)
- Catalan (Spain)
- Chinese (Cantonese)
- Czech (Czech_Republic)
- Danish (Denmark)

- Dutch (Belgium)
- Dutch (Netherlands))
- English (Australia)
- English (India)
- English (Irish)
- Afrikaans (South Africa)
- English (Scottish)
- Finnish (Finland)
- Galician (Spain)
- Greek gr-GR
- Hebrews (Israel)
- Hindi (India)
- Hungarian (Hungary)
- Icelandic (Iceland)
- Indonesian (Indonesia)
- Korean (Korea)
- Mandarin (Taiwan)
- Norwegian (Norway)
- Polish (Poland)
- Romanian (Romania)
- English (South Africa)
- Slovak (Slovakia)
- Swedish (Sweden)
- Thai (Thailand)
- Turkish (Turkey)
- Valencian (Spain)

Supported time zones

POM supports all Java-supported time zones. The following are some of the commonly referenced time zones:

Note:

To edit or import the time zone value for a contact, you must specify the time zone using the values mentioned in the ID column.

*** Note:**

There is an inconsistency in the behavior of the Indian Standard Timezone before the year 1905 for the Postgres database because of the inconsistency in different time zones in the history of Indian Time. At various points of time in history, the Indian time zone was different and also there were multiple Time Zones in the country.

Offset	DST	ID	Time Zone
-12	-12	Etc/GMT+12	GMT-12:00
-11	-11	Etc/GMT+11	GMT-11:00
-11	-11	MIT	West Samoa Time
-11	-11	Pacific/Apia	West Samoa Time
-11	-11	Pacific/Midway	Samoa Standard Time
-11	-11	Pacific/Niue	Niue Time
-11	-11	Pacific/Pago_Pago	Samoa Standard Time
-11	-11	Pacific/Samoa	Samoa Standard Time
-11	-11	US/Samoa	Samoa Standard Time
-10	-11	America/Adak	Hawaii-Aleutian Standard Time
-10	-9	America/Atka	Hawaii-Aleutian Standard Time
-10	-9	Etc/GMT+10	GMT-10:00
-10	-10	HST	Hawaii Standard Time
-10	-10	Pacific/Fakaofu	Tokelau Time
-10	-10	Pacific/Honolulu	Hawaii Standard Time
-10	-10	Pacific/Johnston	Hawaii Standard Time
-10	-10	Pacific/Rarotonga	Cook Is. Time
-10	-10	Pacific/Tahiti	Tahiti Time
-10	-10	SystemV/HST10	Hawaii Standard Time
-10	-9	US/Aleutian	Hawaii-Aleutian Standard Time
-10	-10	US/Hawaii	Hawaii Standard Time
-9.5	-9.5	Pacific/Marquesas	Marquesas Time
-9	-8	AST	Alaska Standard Time
-9	-8	America/Anchorage	Alaska Standard Time
-9	-8	America/Juneau	Alaska Standard Time
-9	-8	America/Nome	Alaska Standard Time
-9	-8	America/Yakutat	Alaska Standard Time
-9	-9	Etc/GMT+9	GMT-09:00
-9	-9	Pacific/Gambier	Gambier Time
-9	-9	SystemV/YST9	Alaska Standard Time

Table continues...

Offset	DST	ID	Time Zone
-9	-8	SystemV/YST9YDT	Alaska Standard Time
-9	-8	US/Alaska	Alaska Standard Time
-8	-7	America/Dawson	Pacific Standard Time
-8	-7	America/Ensenada	Pacific Standard Time
-8	-7	America/Los_Angeles	Pacific Standard Time
-8	-7	America/Santa_Isabel	Pacific Standard Time
-8	-7	America/Tijuana	Pacific Standard Time
-8	-7	America/Vancouver	Pacific Standard Time
-8	-7	America/Whitehorse	Pacific Standard Time
-8	-7	Canada/Pacific	Pacific Standard Time
-8	-7	Canada/Yukon	Pacific Standard Time
-8	-8	Etc/GMT+8	GMT-08:00
-8	-7	Mexico/BajaNorte	Pacific Standard Time
-8	-7	PST	Pacific Standard Time
-8	-7	PST8PDT	Pacific Standard Time
-8	-8	Pacific/Pitcairn	Pitcairn Standard Time
-8	-8	SystemV/PST8	Pacific Standard Time
-8	-7	SystemV/PST8PDT	Pacific Standard Time
-8	-7	US/Pacific	Pacific Standard Time
-8	-7	US/Pacific-New	Pacific Standard Time
-7	-6	America/Boise	Mountain Standard Time
-7	-6	America/Cambridge_Bay	Mountain Standard Time
-7	-6	America/Chihuahua	Mountain Standard Time
-7	-7	America/Dawson_Creek	Mountain Standard Time
-7	-6	America/Denver	Mountain Standard Time
-7	-6	America/Edmonton	Mountain Standard Time
-7	-7	America/Hermosillo	Mountain Standard Time
-7	-6	America/Inuvik	Mountain Standard Time
-7	-6	America/Mazatlan	Mountain Standard Time
-7	-6	America/Ojinaga	Mountain Standard Time
-7	-7	America/Phoenix	Mountain Standard Time
-7	-6	America/Shiprock	Mountain Standard Time
-7	-6	America/Yellowknife	Mountain Standard Time
-7	-6	Canada/Mountain	Mountain Standard Time
-7	-7	Etc/GMT+7	GMT-07:00

Table continues...

Offset	DST	ID	Time Zone
-7	-7	MST	Mountain Standard Time
-7	-6	MST7MDT	Mountain Standard Time
-7	-6	Mexico/BajaSur	Mountain Standard Time
-7	-6	Navajo	Mountain Standard Time
-7	-7	PNT	Mountain Standard Time
-7	-7	SystemV/MST7	Mountain Standard Time
-7	-6	SystemV/MST7MDT	Mountain Standard Time
-7	-7	US/Arizona	Mountain Standard Time
-7	-6	US/Mountain	Mountain Standard Time
-6	-6	America/Belize	Central Standard Time
-6	-5	America/Cancun	Central Standard Time
-6	-5	America/Chicago	Central Standard Time
-6	-6	America/Costa_Rica	Central Standard Time
-6	-6	America/El_Salvador	Central Standard Time
-6	-6	America/Guatemala	Central Standard Time
-6	-5	America/Indiana/Knox	Central Standard Time
-6	-5	America/Indiana/Tell_City	Central Standard Time
-6	-5	America/Knox_IN	Central Standard Time
-6	-6	America/Managua	Central Standard Time
-6	-5	America/Matamoros	Central Standard Time
-6	-5	America/Menominee	Central Standard Time
-6	-5	America/Merida	Central Standard Time
-6	-5	America/Mexico_City	Central Standard Time
-6	-5	America/Monterrey	Central Standard Time
-6	-5	America/North_Dakota/Center	Central Standard Time
-6	-5	America/North_Dakota/ New_Salem	Central Standard Time
-6	-5	America/Rainy_River	Central Standard Time
-6	-5	America/Rankin_Inlet	Central Standard Time
-6	-6	America/Regina	Central Standard Time
-6	-6	America/Swift_Current	Central Standard Time
-6	-6	America/Tegucigalpa	Central Standard Time
-6	-5	America/Winnipeg	Central Standard Time
-6	-5	CST	Central Standard Time
-6	-5	CST6CDT	Central Standard Time

Table continues...

Offset	DST	ID	Time Zone
-6	-5	Canada/Central	Central Standard Time
-6	-6	Canada/East-Saskatchewan	Central Standard Time
-6	-6	Canada/Saskatchewan	Central Standard Time
-6	-5	Chile/EasterIsland	Easter Is. Time
-6	-6	Etc/GMT+6	GMT-06:00
-6	-5	Mexico/General	Central Standard Time
-6	-5	Pacific/Easter	Easter Is. Time
-6	-6	Pacific/Galapagos	Galapagos Time
-6	-6	SystemV/CST6	Central Standard Time
-6	-5	SystemV/CST6CDT	Central Standard Time
-6	-5	US/Central	Central Standard Time
-6	-5	US/Indiana-Starke	Central Standard Time
-6	-5	America/Atikokan	Eastern Standard Time
-5	-5	America/Bogota	Colombia Time
-5	-5	America/Cayman	Eastern Standard Time
-5	-5	America/Coral_Harbour	Eastern Standard Time
-5	-4	America/Detroit	Eastern Standard Time
-5	-4	America/Fort_Wayne	Eastern Standard Time
-5	-4	America/Grand_Turk	Eastern Standard Time
-5	-5	America/Guayaquil	Ecuador Time
-5	-4	America/Havana	Cuba Standard Time
-5	-4	America/Indiana/Indianapolis	Eastern Standard Time
-5	-4	America/Indiana/Marengo	Eastern Standard Time
-5	-5	America/Indiana/Petersburg	Eastern Standard Time
-5	-4	America/Indiana/Vevay	Eastern Standard Time
-5	-5	America/Indiana/Vincennes	Eastern Standard Time
-5	-4	America/Indiana/Winamac	Eastern Standard Time
-5	-4	America/Indianapolis	Eastern Standard Time
-5	-4	America/Iqaluit	Eastern Standard Time
-5	-5	America/Jamaica	Eastern Standard Time
-5	-4	America/Kentucky/Louisville	Eastern Standard Time
-5	-4	America/Kentucky/Monticello	Eastern Standard Time
-5	-5	America/Lima	Peru Time
-5	-4	America/Louisville	Eastern Standard Time
-5	-4	America/Montreal	Eastern Standard Time

Table continues...

Offset	DST	ID	Time Zone
-5	-4	America/Nassau	Eastern Standard Time
-5	-4	America/New_York	Eastern Standard Time
-5	-4	America/Nipigon	Eastern Standard Time
-5	-5	America/Panama	Eastern Standard Time
-5	-4	America/Pangnirtung	Eastern Standard Time
-5	-5	America/Port-au-Prince	Eastern Standard Time
-5	-5	America/Resolute	Eastern Standard Time
-5	-4	America/Thunder_Bay	Eastern Standard Time
-5	-4	America/Toronto	Eastern Standard Time
-5	-4	Canada/Eastern	Eastern Standard Time
-5	-4	Cuba	Cuba Standard Time
-5	-5	EST	Eastern Standard Time
-5	-4	EST5EDT	Eastern Standard Time
-5	-5	Etc/GMT+5	GMT-05:00
-5	-4	IET	Eastern Standard Time
-5	-5	Jamaica	Eastern Standard Time
-5	-5	SystemV/EST5	Eastern Standard Time
-5	-4	SystemV/EST5EDT	Eastern Standard Time
-5	-4	US/East-Indiana	Eastern Standard Time
-5	-4	US/Eastern	Eastern Standard Time
-5	-4	US/Michigan	Eastern Standard Time
-4.5	-4	America/Caracas	Venezuela Time
-4	-4	America/Anguilla	Atlantic Standard Time
-4	-4	America/Antigua	Atlantic Standard Time
-4	-3	America/Argentina/San_Luis	Western Argentine Time
-4	-4	America/Aruba	Atlantic Standard Time
-4	-3	America/Asuncion	Paraguay Time
-4	-4	America/Barbados	Atlantic Standard Time
-4	-4	America/Blanc-Sablon	Atlantic Standard Time
-4	-4	America/Boa_Vista	Amazon Time
-4	-3	America/Campo_Grande	Amazon Time
-4	-3	America/Cuiaba	Amazon Time
-4	-4	America/Curacao	Atlantic Standard Time
-4	-4	America/Dominica	Atlantic Standard Time
-4	-5	America/Eirunepe	Amazon Time

Table continues...

Offset	DST	ID	Time Zone
-4	-3	America/Glace_Bay	Atlantic Standard Time
-4	-3	America/Goose_Bay	Atlantic Standard Time
-4	-4	America/Grenada	Atlantic Standard Time
-4	-4	America/Guadeloupe	Atlantic Standard Time
-4	-4	America/Guyana	Guyana Time
-4	-3	America/Halifax	Atlantic Standard Time
-4	-4	America/La_Paz	Bolivia Time
-4	-4	America/Manaus	Amazon Time
-4	-4	America/Marigot	Atlantic Standard Time
-4	-4	America/Martinique	Atlantic Standard Time
-4	-3	America/Moncton	Atlantic Standard Time
-4	-4	America/Montserrat	Atlantic Standard Time
-4	-4	America/Port_of_Spain	Atlantic Standard Time
-4	-5	America/Porto_Acre	Amazon Time
-4	-4	America/Porto_Velho	Amazon Time
-4	-4	America/Puerto_Rico	Atlantic Standard Time
-4	-5	America/Rio_Branco	Amazon Time
-4	-3	America/Santiago	Chile Time
-4	-4	America/Santo_Domingo	Atlantic Standard Time
-4	-4	America/St_Barthelemy	Atlantic Standard Time
-4	-4	America/St_Kitts	Atlantic Standard Time
-4	-4	America/St_Lucia	Atlantic Standard Time
-4	-4	America/St_Thomas	Atlantic Standard Time
-4	-4	America/St_Vincent	Atlantic Standard Time
-4	-3	America/Thule	Atlantic Standard Time
-4	-4	America/Tortola	Atlantic Standard Time
-4	-4	America/Virgin	Atlantic Standard Time
-4	-3	Antarctica/Palmer	Chile Time
-4	-3	Atlantic/Bermuda	Atlantic Standard Time
-4	-3	Atlantic/Stanley	Falkland Is. Time
-4	-5	Brazil/Acre	Amazon Time
-4	-4	Brazil/West	Amazon Time
-4	-3	Canada/Atlantic	Atlantic Standard Time
-4	-3	Chile/Continental	Chile Time
-4	-4	Etc/GMT+4	GMT-04:00

Table continues...

Offset	DST	ID	Time Zone
-4	-4	PRT	Atlantic Standard Time
-4	-4	SystemV/AST4	Atlantic Standard Time
-4	-3	SystemV/AST4ADT	Atlantic Standard Time
-3.5	-2.5	America/St_Johns	Newfoundland Standard Time
-3.5	-2.5	CNT	Newfoundland Standard Time
-3.5	-2.5	Canada/Newfoundland	Newfoundland Standard Time
-3	-3	AGT	Argentine Time
-3	-3	America/Araguaina	Brasilia Time
-3	-3	America/Argentina/ Buenos_Aires	Argentine Time
-3	-3	America/Argentina/Catamarca	Argentine Time
-3	-3	America/Argentina/ ComodRivadavia	Argentine Time
-3	-3	America/Argentina/Cordoba	Argentine Time
-3	-3	America/Argentina/Jujuy	Argentine Time
-3	-3	America/Argentina/La_Rioja	Argentine Time
-3	-3	America/Argentina/Mendoza	Argentine Time
-3	-3	America/Argentina/ Rio_Gallegos	Argentine Time
-3	-3	America/Argentina/Salta	Argentine Time
-3	-3	America/Argentina/San_Juan	Argentine Time
-3	-3	America/Argentina/Tucuman	Argentine Time
-3	-3	America/Argentina/Ushuaia	Argentine Time
-3	-3	America/Bahia	Brasilia Time
-3	-3	America/Belem	Brasilia Time
-3	-3	America/Buenos_Aires	Argentine Time
-3	-3	America/Catamarca	Argentine Time
-3	-3	America/Cayenne	French Guiana Time
-3	-3	America/Cordoba	Argentine Time
-3	-3	America/Fortaleza	Brasilia Time
-3	-2	America/Godthab	Western Greenland Time
-3	-3	America/Jujuy	Argentine Time
-3	-3	America/Maceio	Brasilia Time
-3	-3	America/Mendoza	Argentine Time
-3	-2	America/Miquelon	Pierre & Miquelon Standard Time
-3	-2	America/Montevideo	Uruguay Time

Table continues...

Offset	DST	ID	Time Zone
-3	-3	America/Paramaribo	Suriname Time
-3	-3	America/Recife	Brasilia Time
-3	-3	America/Rosario	Argentine Time
-3	-4	America/Santarem	Brasilia Time
-3	-2	America/Sao_Paulo	Brasilia Time
-3	-3	Antarctica/Rothera	Rothera Time
-3	-2	BET	Brasilia Time
-3	-2	Brazil/East	Brasilia Time
-3	-3	Etc/GMT+3	GMT-03:00
-2	-2	America/Noronha	Fernando de Noronha Time
-2	-2	Atlantic/South_Georgia	South Georgia Standard Time
-2	-2	Brazil/DeNoronha	Fernando de Noronha Time
-2	-2	Etc/GMT+2	GMT-02:00
-1	0	America/Scoresbysund	Eastern Greenland Time
-1	0	Atlantic/Azores	Azores Time
-1	-1	Atlantic/Cape_Verde	Cape Verde Time
-1	-1	Etc/GMT+1	GMT-01:00
0	0	Africa/Abidjan	Greenwich Mean Time
0	0	Africa/Accra	Ghana Mean Time
0	0	Africa/Bamako	Greenwich Mean Time
0	0	Africa/Banjul	Greenwich Mean Time
0	0	Africa/Bissau	Greenwich Mean Time
0	0	Africa/Casablanca	Western European Time
0	0	Africa/Conakry	Greenwich Mean Time
0	0	Africa/Dakar	Greenwich Mean Time
0	0	Africa/El_Aaiun	Western European Time
0	0	Africa/Freetown	Greenwich Mean Time
0	0	Africa/Lome	Greenwich Mean Time
0	0	Africa/Monrovia	Greenwich Mean Time
0	0	Africa/Nouakchott	Greenwich Mean Time
0	0	Africa/Ouagadougou	Greenwich Mean Time
0	0	Africa/Sao_Tome	Greenwich Mean Time
0	0	Africa/Timbuktu	Greenwich Mean Time
0	0	America/Danmarkshavn	Greenwich Mean Time
0	1	Atlantic/Canary	Western European Time

Table continues...

Offset	DST	ID	Time Zone
0	1	Atlantic/Faeroe	Western European Time
0	1	Atlantic/Faroe	Western European Time
0	1	Atlantic/Madeira	Western European Time
0	0	Atlantic/Reykjavik	Greenwich Mean Time
0	0	Atlantic/St_Helena	Greenwich Mean Time
0	1	Eire	Greenwich Mean Time
0	0	Etc/GMT	GMT+00:00
0	0	Etc/GMT+0	GMT+00:00
0	0	Etc/GMT-0	GMT+00:00
0	0	Etc/GMT0	GMT+00:00
0	0	Etc/Greenwich	Greenwich Mean Time
0	0	Etc/UCT	Coordinated Universal Time
0	0	Etc/UTC	Coordinated Universal Time
0	0	Etc/Universal	Coordinated Universal Time
0	0	Etc/Zulu	Coordinated Universal Time
0	1	Europe/Belfast	Greenwich Mean Time
0	1	Europe/Dublin	Greenwich Mean Time
0	1	Europe/Guernsey	Greenwich Mean Time
0	1	Europe/Isle_of_Man	Greenwich Mean Time
0	1	Europe/Jersey	Greenwich Mean Time
0	1	Europe/Lisbon	Western European Time
0	1	Europe/London	Greenwich Mean Time
0	1	GB	Greenwich Mean Time
0	1	GB-Eire	Greenwich Mean Time
0	0	GMT	Greenwich Mean Time
0	0	GMT0	GMT+00:00
0	0	Greenwich	Greenwich Mean Time
0	0	Iceland	Greenwich Mean Time
0	1	Portugal	Western European Time
0	0	UCT	Coordinated Universal Time
0	0	UTC	Coordinated Universal Time
0	0	Universal	Coordinated Universal Time
0	1	WET	Western European Time
0	0	Zulu	Coordinated Universal Time
1	1	Africa/Algiers	Central European Time

Table continues...

Offset	DST	ID	Time Zone
1	1	Africa/Bangui	Western African Time
1	1	Africa/Brazzaville	Western African Time
1	2	Africa/Ceuta	Central European Time
1	1	Africa/Douala	Western African Time
1	1	Africa/Kinshasa	Western African Time
1	1	Africa/Lagos	Western African Time
1	1	Africa/Libreville	Western African Time
1	1	Africa/Luanda	Western African Time
1	1	Africa/Malabo	Western African Time
1	1	Africa/Ndjamena	Western African Time
1	1	Africa/Niamey	Western African Time
1	1	Africa/Porto-Novo	Western African Time
1	2	Africa/Tunis	Central European Time
1	2	Africa/Windhoek	Western African Time
1	2	Arctic/Longyearbyen	Central European Time
1	2	Atlantic/Jan_Mayen	Central European Time
1	2	CET	Central European Time
1	2	ECT	Central European Time
1	1	Etc/GMT-1	GMT+01:00
1	2	Europe/Amsterdam	Central European Time
1	2	Europe/Andorra	Central European Time
1	2	Europe/Belgrade	Central European Time
1	2	Europe/Berlin	Central European Time
1	2	Europe/Bratislava	Central European Time
1	2	Europe/Brussels	Central European Time
1	2	Europe/Budapest	Central European Time
1	2	Europe/Copenhagen	Central European Time
1	2	Europe/Gibraltar	Central European Time
1	2	Europe/Ljubljana	Central European Time
1	2	Europe/Luxembourg	Central European Time
1	2	Europe/Madrid	Central European Time
1	2	Europe/Malta	Central European Time
1	2	Europe/Monaco	Central European Time
1	2	Europe/Oslo	Central European Time
1	2	Europe/Paris	Central European Time

Table continues...

Offset	DST	ID	Time Zone
1	2	Europe/Podgorica	Central European Time
1	2	Europe/Prague	Central European Time
1	2	Europe/Rome	Central European Time
1	2	Europe/San_Marino	Central European Time
1	2	Europe/Sarajevo	Central European Time
1	2	Europe/Skopje	Central European Time
1	2	Europe/Stockholm	Central European Time
1	2	Europe/Tirane	Central European Time
1	2	Europe/Vaduz	Central European Time
1	2	Europe/Vatican	Central European Time
1	2	Europe/Vienna	Central European Time
1	2	Europe/Warsaw	Central European Time
1	2	Europe/Zagreb	Central European Time
1	2	Europe/Zurich	Central European Time
1	2	MET	Middle Europe Time
1	2	Poland	Central European Time
2	3	ART	Eastern European Time
2	2	Africa/Blantyre	Central African Time
2	2	Africa/Bujumbura	Central African Time
2	3	Africa/Cairo	Eastern European Time
2	2	Africa/Gaborone	Central African Time
2	2	Africa/Harare	Central African Time
2	2	Africa/Johannesburg	South Africa Standard Time
2	2	Africa/Lubumbashi	Central African Time
2	2	Africa/Lusaka	Central African Time
2	2	Africa/Maputo	Central African Time
2	2	Africa/Maseru	South Africa Standard Time
2	2	Africa/Mbabane	South Africa Standard Time
2	2	Africa/Tripoli	Eastern European Time
2	3	Asia/Amman	Eastern European Time
2	3	Asia/Beirut	Eastern European Time
2	3	Asia/Damascus	Eastern European Time
2	3	Asia/Gaza	Eastern European Time
2	3	Asia/Istanbul	Eastern European Time
2	3	Asia/Jerusalem	Israel Standard Time

Table continues...

Offset	DST	ID	Time Zone
2	3	Asia/Nicosia	Eastern European Time
2	3	Asia/Tel_Aviv	Israel Standard Time
2	2	CAT	Central African Time
2	3	EET	Eastern European Time
2	3	Egypt	Eastern European Time
2	2	Etc/GMT-2	GMT+02:00
2	3	Europe/Athens	Eastern European Time
2	3	Europe/Bucharest	Eastern European Time
2	3	Europe/Chisinau	Eastern European Time
2	3	Europe/Helsinki	Eastern European Time
2	3	Europe/Istanbul	Eastern European Time
2	3	Europe/Kaliningrad	Eastern European Time
2	3	Europe/Kiev	Eastern European Time
2	3	Europe/Mariehamn	Eastern European Time
2	3	Europe/Minsk	Eastern European Time
2	3	Europe/Nicosia	Eastern European Time
2	3	Europe/Riga	Eastern European Time
2	3	Europe/Simferopol	Eastern European Time
2	3	Europe/Sofia	Eastern European Time
2	3	Europe/Tallinn	Eastern European Time
2	3	Europe/Tiraspol	Eastern European Time
2	3	Europe/Uzhgorod	Eastern European Time
2	3	Europe/Vilnius	Eastern European Time
2	3	Europe/Zaporozhye	Eastern European Time
2	3	Israel	Israel Standard Time
2	2	Libya	Eastern European Time
2	3	Turkey	Eastern European Time
3	3	Africa/Addis_Ababa	Eastern African Time
3	3	Africa/Asmara	Eastern African Time
3	3	Africa/Asmera	Eastern African Time
3	3	Africa/Dar_es_Salaam	Eastern African Time
3	3	Africa/Djibouti	Eastern African Time
3	3	Africa/Kampala	Eastern African Time
3	3	Africa/Khartoum	Eastern African Time
3	3	Africa/Mogadishu	Eastern African Time

Table continues...

Offset	DST	ID	Time Zone
3	3	Africa/Nairobi	Eastern African Time
3	3	Antarctica/Syowa	Syowa Time
3	3	Asia/Aden	Arabia Standard Time
3	4	Asia/Baghdad	Arabia Standard Time
3	3	Asia/Bahrain	Arabia Standard Time
3	3	Asia/Kuwait	Arabia Standard Time
3	3	Asia/Qatar	Arabia Standard Time
3	3	Asia/Riyadh	Arabia Standard Time
3	3	EAT	Eastern African Time
3	3	Etc/GMT-3	GMT+03:00
3	4	Europe/Moscow	Moscow Standard Time
3	5	Europe/Samara	Samara Time
3	4	Europe/Volgograd	Volgograd Time
3	3	Indian/Antananarivo	Eastern African Time
3	3	Indian/Comoro	Eastern African Time
3	3	Indian/Mayotte	Eastern African Time
3	4	W-SU	Moscow Standard Time
3.117777778	3.117777778	Asia/Riyadh87	GMT+03:07
3.117777778	3.117777778	Asia/Riyadh88	GMT+03:07
3.117777778	3.117777778	Asia/Riyadh89	GMT+03:07
3.117777778	3.117777778	Mideast/Riyadh87	GMT+03:07
3.117777778	3.117777778	Mideast/Riyadh88	GMT+03:07
3.117777778	3.117777778	Mideast/Riyadh89	GMT+03:07
3.5	3.5	Asia/Tehran	Iran Standard Time
3.5	3.5	Iran	Iran Standard Time
4	5	Asia/Baku	Azerbaijan Time
4	4	Asia/Dubai	Gulf Standard Time
4	4	Asia/Muscat	Gulf Standard Time
4	4	Asia/Tbilisi	Georgia Time
4	5	Asia/Yerevan	Armenia Time
4	4	Etc/GMT-4	GMT+04:00
4	4	Indian/Mahe	Seychelles Time
4	4	Indian/Mauritius	Mauritius Time
4	4	Indian/Reunion	Reunion Time
4	5	NET	Armenia Time

Table continues...

Offset	DST	ID	Time Zone
4.5	4.5	Asia/Kabul	Afghanistan Time
5	6	Antarctica/Mawson	Mawson Time
5	5	Asia/Aqtau	Aqtau Time
5	5	Asia/Aqtobe	Aqtobe Time
5	5	Asia/Ashgabat	Turkmenistan Time
5	5	Asia/Ashkhabad	Turkmenistan Time
5	5	Asia/Dushanbe	Tajikistan Time
5	5	Asia/Karachi	Pakistan Time
5	5	Asia/Oral	Oral Time
5	5	Asia/Samarkand	Uzbekistan Time
5	5	Asia/Tashkent	Uzbekistan Time
5	6	Asia/Yekaterinburg	Yekaterinburg Time
5	5	Etc/GMT-5	GMT+05:00
5	5	Indian/Kerguelen	French Southern & Antarctic Lands Time
5	5	Indian/Maldives	Maldives Time
5	5	PLT	Pakistan Time
5.5	5.5	Asia/Calcutta	India Standard Time
5.5	5.5	Asia/Colombo	India Standard Time
5.5	5.5	Asia/Kolkata	India Standard Time
5.5	5.5	IST	India Standard Time
5.75	5.75	Asia/Kathmandu	Nepal Time
5.75	5.75	Asia/Katmandu	Nepal Time
6	6	Antarctica/Vostok	Vostok Time
6	6	Asia/Almaty	Alma-Ata Time
6	6	Asia/Bishkek	Kirgizstan Time
6	6	Asia/Dacca	Bangladesh Time
6	6	Asia/Dhaka	Bangladesh Time
6	8	Asia/Novokuznetsk	Novosibirsk Time
6	7	Asia/Novosibirsk	Novosibirsk Time
6	7	Asia/Omsk	Omsk Time
6	6	Asia/Qyzylorda	Qyzylorda Time
6	6	Asia/Thimbu	Bhutan Time
6	6	Asia/Thimphu	Bhutan Time
6	6	BST	Bangladesh Time

Table continues...

Offset	DST	ID	Time Zone
6	6	Etc/GMT-6	GMT+06:00
6	6	Indian/Chagos	Indian Ocean Territory Time
6.5	6.5	Asia/Rangoon	Myanmar Time
6.5	6.5	Indian/Cocos	Cocos Islands Time
7	7	Antarctica/Davis	Davis Time
7	7	Asia/Bangkok	Indochina Time
7	7	Asia/Ho_Chi_Minh	Indochina Time
7	7	Asia/Hovd	Hovd Time
7	7	Asia/Jakarta	West Indonesia Time
7	8	Asia/Krasnoyarsk	Krasnoyarsk Time
7	7	Asia/Phnom_Penh	Indochina Time
7	7	Asia/Pontianak	West Indonesia Time
7	7	Asia/Saigon	Indochina Time
7	7	Asia/Vientiane	Indochina Time
7	7	Etc/GMT-7	GMT+07:00
7	7	Indian/Christmas	Christmas Island Time
7	7	VST	Indochina Time
8	8	Antarctica/Casey	Western Standard Time (Australia)
8	8	Asia/Brunei	Brunei Time
8	9	Asia/Choibalsan	Choibalsan Time
8	8	Asia/Chongqing	China Standard Time
8	8	Asia/Chungking	China Standard Time
8	8	Asia/Harbin	China Standard Time
8	8	Asia/Hong_Kong	Hong Kong Time
8	9	Asia/Irkutsk	Irkutsk Time
8	8	Asia/Kashgar	China Standard Time
8	8	Asia/Kuala_Lumpur	Malaysia Time
8	8	Asia/Kuching	Malaysia Time
8	8	Asia/Macao	China Standard Time
8	8	Asia/Macau	China Standard Time
8	8	Asia/Makassar	Central Indonesia Time
8	8	Asia/Manila	Philippines Time
8	8	Asia/Shanghai	China Standard Time
8	8	Asia/Singapore	Singapore Time

Table continues...

Offset	DST	ID	Time Zone
8	8	Asia/Taipei	China Standard Time
8	8	Asia/Ujung_Pandang	Central Indonesia Time
8	8	Asia/Ulaanbaatar	Ulaanbaatar Time
8	8	Asia/Ulan_Bator	Ulaanbaatar Time
8	8	Asia/Urumqi	China Standard Time
8	9	Australia/Perth	Western Standard Time (Australia)
8	9	Australia/West	Western Standard Time (Australia)
8	8	CTT	China Standard Time
8	8	Etc/GMT-8	GMT+08:00
8	8	Hongkong	Hong Kong Time
8	8	PRC	China Standard Time
8	8	Singapore	Singapore Time
8.75	9.75	Australia/Eucla	Central Western Standard Time (Australia)
9	9	Asia/Dili	Timor-Leste Time
9	9	Asia/Jayapura	East Indonesia Time
9	9	Asia/Pyongyang	Korea Standard Time
9	9	Asia/Seoul	Korea Standard Time
9	9	Asia/Tokyo	Japan Standard Time
9	10	Asia/Yakutsk	Yakutsk Time
9	9	Etc/GMT-9	GMT+09:00
9	9	JST	Japan Standard Time
9	9	Japan	Japan Standard Time
9	9	Pacific/Palau	Palau Time
9	9	ROK	Korea Standard Time
9.5	9.5	ACT	Central Standard Time (Northern Territory)
9.5	10.5	Australia/Adelaide	Central Standard Time (South Australia)
9.5	10.5	Australia/Broken_Hill	Central Standard Time (South Australia/New South Wales)
9.5	9.5	Australia/Darwin	Central Standard Time (Northern Territory)
9.5	9.5	Australia/North	Central Standard Time (Northern Territory)

Table continues...

Offset	DST	ID	Time Zone
9.5	10.5	Australia/South	Central Standard Time (South Australia)
9.5	10.5	Australia/Yancowinna	Central Standard Time (South Australia/New South Wales)
10	11	AET	Eastern Standard Time (New South Wales)
10	10	Antarctica/DumontDUrville	Dumont-d'Urville Time
10	11	Asia/Sakhalin	Sakhalin Time
10	11	Asia/Vladivostok	Vladivostok Time
10	11	Australia/ACT	Eastern Standard Time (New South Wales)
10	10	Australia/Brisbane	Eastern Standard Time (Queensland)
10	11	Australia/Canberra	Eastern Standard Time (New South Wales)
10	11	Australia/Currie	Eastern Standard Time (New South Wales)
10	11	Australia/Hobart	Eastern Standard Time (Tasmania)
10	10	Australia/Lindeman	Eastern Standard Time (Queensland)
10	11	Australia/Melbourne	Eastern Standard Time (Victoria)
10	11	Australia/NSW	Eastern Standard Time (New South Wales)
10	10	Australia/Queensland	Eastern Standard Time (Queensland)
10	11	Australia/Sydney	Eastern Standard Time (New South Wales)
10	11	Australia/Tasmania	Eastern Standard Time (Tasmania)
10	11	Australia/Victoria	Eastern Standard Time (Victoria)
10	10	Etc/GMT-10	GMT+10:00
10	10	Pacific/Guam	Chamorro Standard Time
10	10	Pacific/Port_Moresby	Papua New Guinea Time
10	10	Pacific/Saipan	Chamorro Standard Time
10	10	Pacific/Truk	Truk Time
10	10	Pacific/Yap	Truk Time
10.5	11	Australia/LHI	Lord Howe Standard Time
10.5	11	Australia/Lord_Howe	Lord Howe Standard Time

Table continues...

Offset	DST	ID	Time Zone
11	10	Antarctica/Macquarie	Macquarie Island Time
11	13	Asia/Anadyr	Anadyr Time
11	13	Asia/Kamchatka	Petropavlovsk-Kamchatski Time
11	12	Asia/Magadan	Magadan Time
11	11	Etc/GMT-11	GMT+11:00
11	11	Pacific/Efate	Vanuatu Time
11	11	Pacific/Guadalcanal	Solomon Is. Time
11	11	Pacific/Kosrae	Kosrae Time
11	11	Pacific/Noumea	New Caledonia Time
11	11	Pacific/Ponape	Ponape Time
11	11	SST	Solomon Is. Time
11.5	11.5	Pacific/Norfolk	Norfolk Time
12	13	Antarctica/McMurdo	New Zealand Standard Time
12	13	Antarctica/South_Pole	New Zealand Standard Time
12	12	Etc/GMT-12	GMT+12:00
12	12	Kwajalein	Marshall Islands Time
12	13	NST	New Zealand Standard Time
12	13	NZ	New Zealand Standard Time
12	13	Pacific/Auckland	New Zealand Standard Time
12	12	Pacific/Fiji	Fiji Time
12	12	Pacific/Funafuti	Tuvalu Time
12	12	Pacific/Kwajalein	Marshall Islands Time
12	12	Pacific/Majuro	Marshall Islands Time
12	12	Pacific/Nauru	Nauru Time
12	12	Pacific/Tarawa	Gilbert Is. Time
12	12	Pacific/Wake	Wake Time
12	12	Pacific/Wallis	Wallis & Futuna Time
12.75	13.75	NZ-CHAT	Chatham Standard Time
12.75	13.75	Pacific/Chatham	Chatham Standard Time
13	13	Etc/GMT-13	GMT+13:00
13	13	Pacific/Enderbury	Phoenix Is. Time
13	13	Pacific/Tongatapu	Tonga Time
14	14	Etc/GMT-14	GMT+14:00
14	14	Pacific/Kiritimati	Line Is. Time

Supported time zone after enabling advanced guard time

After you enable advanced guard time, use the following GMT Offset to Java time zone mappings:

*** Note:**

Advanced guard time is enabled by default.

Java Time Zone	GMT Offset
Africa/Abidjan	GMT0:00
Africa/Accra	GMT0:00
Africa/Addis_Ababa	GMT+3:00
Africa/Algiers	GMT+1:00
Africa/Asmara	GMT+3:00
Africa/Asmera	GMT+3:00
Africa/Bamako	GMT0:00
Africa/Bangui	GMT+1:00
Africa/Banjul	GMT0:00
Africa/Bissau	GMT0:00
Africa/Blantyre	GMT+2:00
Africa/Brazzaville	GMT+1:00
Africa/Bujumbura	GMT+2:00
Africa/Cairo	GMT+2:00
Africa/Casablanca	GMT0:00
Africa/Ceuta	GMT+1:00
Africa/Conakry	GMT0:00
Africa/Dakar	GMT0:00
Africa/Dar_es_Salaam	GMT+3:00
Africa/Djibouti	GMT+3:00
Africa/Douala	GMT+1:00
Africa/El_Aaiun	GMT0:00
Africa/Freetown	GMT0:00
Africa/Gaborone	GMT+2:00
Africa/Harare	GMT+2:00
Africa/Johannesburg	GMT+2:00
Africa/Juba	GMT+3:00
Africa/Kampala	GMT+3:00
Africa/Khartoum	GMT+3:00
Africa/Kigali	GMT+2:00

Table continues...

Java Time Zone	GMT Offset
Africa/Kinshasa	GMT+1:00
Africa/Lagos	GMT+1:00
Africa/Libreville	GMT+1:00
Africa/Lome	GMT0:00
Africa/Luanda	GMT+1:00
Africa/Lubumbashi	GMT+2:00
Africa/Lusaka	GMT+2:00
Africa/Malabo	GMT+1:00
Africa/Maputo	GMT+2:00
Africa/Maseru	GMT+2:00
Africa/Mbabane	GMT+2:00
Africa/Mogadishu	GMT+3:00
Africa/Monrovia	GMT0:00
Africa/Nairobi	GMT+3:00
Africa/Ndjamena	GMT+1:00
Africa/Niamey	GMT+1:00
Africa/Nouakchott	GMT0:00
Africa/Ouagadougou	GMT0:00
Africa/Porto-Novo	GMT+1:00
Africa/Sao_Tome	GMT0:00
Africa/Timbuktu	GMT0:00
Africa/Tripoli	GMT+2:00
Africa/Tunis	GMT+1:00
Africa/Windhoek	GMT+1:00
America/Adak	GMT-10:00
America/Anchorage	GMT-9:00
America/Anguilla	GMT-4:00
America/Antigua	GMT-4:00
America/Araguaina	GMT-3:00
America/Argentina/Buenos_Aires	GMT-3:00
America/Argentina/Catamarca	GMT-3:00
America/Argentina/ComodRivadavia	GMT-3:00
America/Argentina/Cordoba	GMT-3:00
America/Argentina/Jujuy	GMT-3:00
America/Argentina/La_Rioja	GMT-3:00

Table continues...

Java Time Zone	GMT Offset
America/Argentina/Mendoza	GMT-3:00
America/Argentina/Rio_Gallegos	GMT-3:00
America/Argentina/Salta	GMT-3:00
America/Argentina/San_Juan	GMT-3:00
America/Argentina/San_Luis	GMT-3:00
America/Argentina/Tucuman	GMT-3:00
America/Argentina/Ushuaia	GMT-3:00
America/Aruba	GMT-4:00
America/Asuncion	GMT-4:00
America/Atikokan	GMT-5:00
America/Atka	GMT-10:00
America/Bahia	GMT-3:00
America/Bahia_Banderas	GMT-6:00
America/Barbados	GMT-4:00
America/Belem	GMT-3:00
America/Belize	GMT-6:00
America/Blanc-Sablon	GMT-4:00
America/Boa_Vista	GMT-4:00
America/Bogota	GMT-5:00
America/Boise	GMT-7:00
America/Buenos_Aires	GMT-3:00
America/Cambridge_Bay	GMT-7:00
America/Campo_Grande	GMT-4:00
America/Cancun	GMT-5:00
America/Caracas	GMT-4:-30
America/Catamarca	GMT-3:00
America/Cayenne	GMT-3:00
America/Cayman	GMT-5:00
America/Chicago	GMT-6:00
America/Chihuahua	GMT-7:00
America/Coral_Harbour	GMT-5:00
America/Cordoba	GMT-3:00
America/Costa_Rica	GMT-6:00
America/Creston	GMT-7:00
America/Cuiaba	GMT-4:00

Table continues...

Java Time Zone	GMT Offset
America/Curacao	GMT-4:00
America/Danmarkshavn	GMT0:00
America/Dawson	GMT-8:00
America/Dawson_Creek	GMT-7:00
America/Denver	GMT-7:00
America/Detroit	GMT-5:00
America/Dominica	GMT-4:00
America/Edmonton	GMT-7:00
America/Eirunepe	GMT-5:00
America/El_Salvador	GMT-6:00
America/Ensenada	GMT-8:00
America/Fort_Nelson	GMT-7:00
America/Fort_Wayne	GMT-5:00
America/Fortaleza	GMT-3:00
America/Glace_Bay	GMT-4:00
America/Godthab	GMT-3:00
America/Goose_Bay	GMT-4:00
America/Grand_Turk	GMT-4:00
America/Grenada	GMT-4:00
America/Guadeloupe	GMT-4:00
America/Guatemala	GMT-6:00
America/Guayaquil	GMT-5:00
America/Guyana	GMT-4:00
America/Halifax	GMT-4:00
America/Havana	GMT-5:00
America/Hermosillo	GMT-7:00
America/Indiana/Indianapolis	GMT-5:00
America/Indiana/Knox	GMT-6:00
America/Indiana/Marengo	GMT-5:00
America/Indiana/Petersburg	GMT-5:00
America/Indiana/Tell_City	GMT-6:00
America/Indiana/Vevay	GMT-5:00
America/Indiana/Vincennes	GMT-5:00
America/Indiana/Winamac	GMT-5:00
America/Indianapolis	GMT-5:00

Table continues...

Java Time Zone	GMT Offset
America/Inuvik	GMT-7:00
America/Iqaluit	GMT-5:00
America/Jamaica	GMT-5:00
America/Jujuy	GMT-3:00
America/Juneau	GMT-9:00
America/Kentucky/Louisville	GMT-5:00
America/Kentucky/Monticello	GMT-5:00
America/Knox_IN	GMT-6:00
America/Kralendijk	GMT-4:00
America/La_Paz	GMT-4:00
America/Lima	GMT-5:00
America/Los_Angeles	GMT-8:00
America/Louisville	GMT-5:00
America/Lower_Princes	GMT-4:00
America/Maceio	GMT-3:00
America/Managua	GMT-6:00
America/Manaus	GMT-4:00
America/Marigot	GMT-4:00
America/Martinique	GMT-4:00
America/Matamoros	GMT-6:00
America/Mazatlan	GMT-7:00
America/Mendoza	GMT-3:00
America/Menominee	GMT-6:00
America/Merida	GMT-6:00
America/Metlakatla	GMT-9:00
America/Mexico_City	GMT-6:00
America/Miquelon	GMT-3:00
America/Moncton	GMT-4:00
America/Monterrey	GMT-6:00
America/Montevideo	GMT-3:00
America/Montreal	GMT-5:00
America/Montserrat	GMT-4:00
America/Nassau	GMT-5:00
America/New_York	GMT-5:00
America/Nipigon	GMT-5:00

Table continues...

Java Time Zone	GMT Offset
America/Nome	GMT-9:00
America/Noronha	GMT-2:00
America/North_Dakota/Beulah	GMT-6:00
America/North_Dakota/Center	GMT-6:00
America/North_Dakota/New_Salem	GMT-6:00
America/Ojinaga	GMT-7:00
America/Panama	GMT-5:00
America/Pangnirtung	GMT-5:00
America/Paramaribo	GMT-3:00
America/Phoenix	GMT-7:00
America/Port-au-Prince	GMT-5:00
America/Port_of_Spain	GMT-4:00
America/Porto_Acre	GMT-5:00
America/Porto_Velho	GMT-4:00
America/Puerto_Rico	GMT-4:00
America/Rainy_River	GMT-6:00
America/Rankin_Inlet	GMT-6:00
America/Recife	GMT-3:00
America/Regina	GMT-6:00
America/Resolute	GMT-6:00
America/Rio_Branco	GMT-5:00
America/Rosario	GMT-3:00
America/Santa_Isabel	GMT-8:00
America/Santarem	GMT-3:00
America/Santiago	GMT-3:00
America/Santo_Domingo	GMT-4:00
America/Sao_Paulo	GMT-3:00
America/Scoresbysund	GMT-1:00
America/Shiprock	GMT-7:00
America/Sitka	GMT-9:00
America/St_Barthelemy	GMT-4:00
America/St_Johns	GMT-3:-30
America/St_Kitts	GMT-4:00
America/St_Lucia	GMT-4:00
America/St_Thomas	GMT-4:00

Table continues...

Java Time Zone	GMT Offset
America/St_Vincent	GMT-4:00
America/Swift_Current	GMT-6:00
America/Tegucigalpa	GMT-6:00
America/Thule	GMT-4:00
America/Thunder_Bay	GMT-5:00
America/Tijuana	GMT-8:00
America/Toronto	GMT-5:00
America/Tortola	GMT-4:00
America/Vancouver	GMT-8:00
America/Virgin	GMT-4:00
America/Whitehorse	GMT-8:00
America/Winnipeg	GMT-6:00
America/Yakutat	GMT-9:00
America/Yellowknife	GMT-7:00
Antarctica/Casey	GMT+8:00
Antarctica/Davis	GMT+7:00
Antarctica/DumontDUrville	GMT+10:00
Antarctica/Macquarie	GMT+11:00
Antarctica/Mawson	GMT+5:00
Antarctica/McMurdo	GMT+12:00
Antarctica/Palmer	GMT-3:00
Antarctica/Rothera	GMT-3:00
Antarctica/South_Pole	GMT+12:00
Antarctica/Syowa	GMT+3:00
Antarctica/Troll	GMT0:00
Antarctica/Vostok	GMT+6:00
Arctic/Longyearbyen	GMT+1:00
Asia/Aden	GMT+3:00
Asia/Almaty	GMT+6:00
Asia/Amman	GMT+2:00
Asia/Anadyr	GMT+12:00
Asia/Aqtau	GMT+5:00
Asia/Aqtobe	GMT+5:00
Asia/Ashgabat	GMT+5:00
Asia/Ashkhabad	GMT+5:00

Table continues...

Java Time Zone	GMT Offset
Asia/Baghdad	GMT+3:00
Asia/Bahrain	GMT+3:00
Asia/Baku	GMT+4:00
Asia/Bangkok	GMT+7:00
Asia/Beirut	GMT+2:00
Asia/Bishkek	GMT+6:00
Asia/Brunei	GMT+8:00
Asia/Calcutta	GMT+5:30
Asia/Chita	GMT+9:00
Asia/Choibalsan	GMT+8:00
Asia/Chongqing	GMT+8:00
Asia/Chungking	GMT+8:00
Asia/Colombo	GMT+5:30
Asia/Dacca	GMT+6:00
Asia/Damascus	GMT+2:00
Asia/Dhaka	GMT+6:00
Asia/Dili	GMT+9:00
Asia/Dubai	GMT+4:00
Asia/Dushanbe	GMT+5:00
Asia/Gaza	GMT+2:00
Asia/Harbin	GMT+8:00
Asia/Hebron	GMT+2:00
Asia/Ho_Chi_Minh	GMT+7:00
Asia/Hong_Kong	GMT+8:00
Asia/Hovd	GMT+7:00
Asia/Irkutsk	GMT+8:00
Asia/Istanbul	GMT+2:00
Asia/Jakarta	GMT+7:00
Asia/Jayapura	GMT+9:00
Asia/Jerusalem	GMT+2:00
Asia/Kabul	GMT+4:30
Asia/Kamchatka	GMT+12:00
Asia/Karachi	GMT+5:00
Asia/Kashgar	GMT+6:00
Asia/Kathmandu	GMT+5:45

Table continues...

Java Time Zone	GMT Offset
Asia/Katmandu	GMT+5:45
Asia/Khandyga	GMT+9:00
Asia/Kolkata	GMT+5:30
Asia/Krasnoyarsk	GMT+7:00
Asia/Kuala_Lumpur	GMT+8:00
Asia/Kuching	GMT+8:00
Asia/Kuwait	GMT+3:00
Asia/Macao	GMT+8:00
Asia/Macau	GMT+8:00
Asia/Magadan	GMT+10:00
Asia/Makassar	GMT+8:00
Asia/Manila	GMT+8:00
Asia/Muscat	GMT+4:00
Asia/Nicosia	GMT+2:00
Asia/Novokuznetsk	GMT+7:00
Asia/Novosibirsk	GMT+6:00
Asia/Omsk	GMT+6:00
Asia/Oral	GMT+5:00
Asia/Phnom_Penh	GMT+7:00
Asia/Pontianak	GMT+7:00
Asia/Pyongyang	GMT+8:30
Asia/Qatar	GMT+3:00
Asia/Qyzylorda	GMT+6:00
Asia/Rangoon	GMT+6:30
Asia/Riyadh	GMT+3:00
Asia/Saigon	GMT+7:00
Asia/Sakhalin	GMT+10:00
Asia/Samarkand	GMT+5:00
Asia/Seoul	GMT+9:00
Asia/Shanghai	GMT+8:00
Asia/Singapore	GMT+8:00
Asia/Srednekolymysk	GMT+11:00
Asia/Taipei	GMT+8:00
Asia/Tashkent	GMT+5:00
Asia/Tbilisi	GMT+4:00

Table continues...

Java Time Zone	GMT Offset
Asia/Tehran	GMT+3:30
Asia/Tel_Aviv	GMT+2:00
Asia/Thimbu	GMT+6:00
Asia/Thimphu	GMT+6:00
Asia/Tokyo	GMT+9:00
Asia/Ujung_Pandang	GMT+8:00
Asia/Ulaanbaatar	GMT+8:00
Asia/Ulan_Bator	GMT+8:00
Asia/Urumqi	GMT+6:00
Asia/Ust-Nera	GMT+10:00
Asia/Vientiane	GMT+7:00
Asia/Vladivostok	GMT+10:00
Asia/Yakutsk	GMT+9:00
Asia/Yekaterinburg	GMT+5:00
Asia/Yerevan	GMT+4:00
Atlantic/Azores	GMT-1:00
Atlantic/Bermuda	GMT-4:00
Atlantic/Canary	GMT0:00
Atlantic/Cape_Verde	GMT-1:00
Atlantic/Faeroe	GMT0:00
Atlantic/Faroe	GMT0:00
Atlantic/Jan_Mayen	GMT+1:00
Atlantic/Madeira	GMT0:00
Atlantic/Reykjavik	GMT0:00
Atlantic/South_Georgia	GMT-2:00
Atlantic/St_Helena	GMT0:00
Atlantic/Stanley	GMT-3:00
Australia/ACT	GMT+10:00
Australia/Adelaide	GMT+9:30
Australia/Brisbane	GMT+10:00
Australia/Broken_Hill	GMT+9:30
Australia/Canberra	GMT+10:00
Australia/Currie	GMT+10:00
Australia/Darwin	GMT+9:30
Australia/Eucla	GMT+8:45

Table continues...

Java Time Zone	GMT Offset
Australia/Hobart	GMT+10:00
Australia/LHI	GMT+10:30
Australia/Lindeman	GMT+10:00
Australia/Lord_Howe	GMT+10:30
Australia/Melbourne	GMT+10:00
Australia/NSW	GMT+10:00
Australia/North	GMT+9:30
Australia/Perth	GMT+8:00
Australia/Queensland	GMT+10:00
Australia/South	GMT+9:30
Australia/Sydney	GMT+10:00
Australia/Tasmania	GMT+10:00
Australia/Victoria	GMT+10:00
Australia/West	GMT+8:00
Australia/Yancowinna	GMT+9:30
Brazil/Acre	GMT-5:00
Brazil/DeNoronha	GMT-2:00
Brazil/East	GMT-3:00
Brazil/West	GMT-4:00
CET	GMT+1:00
CST6CDT	GMT-6:00
Canada/Atlantic	GMT-4:00
Canada/Central	GMT-6:00
Canada/Eastern	GMT-5:00
Canada/Mountain	GMT-7:00
Canada/Newfoundland	GMT-3:-30
Canada/Pacific	GMT-8:00
Canada/Saskatchewan	GMT-6:00
Canada/Yukon	GMT-8:00
Chile/Continental	GMT-3:00
Chile/EasterIsland	GMT-5:00
Cuba	GMT-5:00
EET	GMT+2:00
EST5EDT	GMT-5:00
Egypt	GMT+2:00

Table continues...

Java Time Zone	GMT Offset
Eire	GMT0:00
Etc/GMT	GMT0:00
Etc/GMT+0	GMT0:00
Etc/GMT+1	GMT-1:00
Etc/GMT+10	GMT-10:00
Etc/GMT+11	GMT-11:00
Etc/GMT+12	GMT-12:00
Etc/GMT+2	GMT-2:00
Etc/GMT+3	GMT-3:00
Etc/GMT+4	GMT-4:00
Etc/GMT+5	GMT-5:00
Etc/GMT+6	GMT-6:00
Etc/GMT+7	GMT-7:00
Etc/GMT+8	GMT-8:00
Etc/GMT+9	GMT-9:00
Etc/GMT-0	GMT0:00
Etc/GMT-1	GMT+1:00
Etc/GMT-10	GMT+10:00
Etc/GMT-11	GMT+11:00
Etc/GMT-12	GMT+12:00
Etc/GMT-13	GMT+13:00
Etc/GMT-14	GMT+14:00
Etc/GMT-2	GMT+2:00
Etc/GMT-3	GMT+3:00
Etc/GMT-4	GMT+4:00
Etc/GMT-5	GMT+5:00
Etc/GMT-6	GMT+6:00
Etc/GMT-7	GMT+7:00
Etc/GMT-8	GMT+8:00
Etc/GMT-9	GMT+9:00
Etc/GMT0	GMT0:00
Etc/Greenwich	GMT0:00
Etc/UCT	GMT0:00
Etc/UTC	GMT0:00
Etc/Universal	GMT0:00

Table continues...

Java Time Zone	GMT Offset
Etc/Zulu	GMT0:00
Europe/Amsterdam	GMT+1:00
Europe/Andorra	GMT+1:00
Europe/Athens	GMT+2:00
Europe/Belfast	GMT0:00
Europe/Belgrade	GMT+1:00
Europe/Berlin	GMT+1:00
Europe/Bratislava	GMT+1:00
Europe/Brussels	GMT+1:00
Europe/Bucharest	GMT+2:00
Europe/Budapest	GMT+1:00
Europe/Busingen	GMT+1:00
Europe/Chisinau	GMT+2:00
Europe/Copenhagen	GMT+1:00
Europe/Dublin	GMT0:00
Europe/Gibraltar	GMT+1:00
Europe/Guernsey	GMT0:00
Europe/Helsinki	GMT+2:00
Europe/Isle_of_Man	GMT0:00
Europe/Istanbul	GMT+2:00
Europe/Jersey	GMT0:00
Europe/Kaliningrad	GMT+2:00
Europe/Kiev	GMT+2:00
Europe/Lisbon	GMT0:00
Europe/Ljubljana	GMT+1:00
Europe/London	GMT0:00
Europe/Luxembourg	GMT+1:00
Europe/Madrid	GMT+1:00
Europe/Malta	GMT+1:00
Europe/Mariehamn	GMT+2:00
Europe/Minsk	GMT+3:00
Europe/Monaco	GMT+1:00
Europe/Moscow	GMT+3:00
Europe/Nicosia	GMT+2:00
Europe/Oslo	GMT+1:00

Table continues...

Java Time Zone	GMT Offset
Europe/Paris	GMT+1:00
Europe/Podgorica	GMT+1:00
Europe/Prague	GMT+1:00
Europe/Riga	GMT+2:00
Europe/Rome	GMT+1:00
Europe/Samara	GMT+4:00
Europe/San_Marino	GMT+1:00
Europe/Sarajevo	GMT+1:00
Europe/Simferopol	GMT+3:00
Europe/Skopje	GMT+1:00
Europe/Sofia	GMT+2:00
Europe/Stockholm	GMT+1:00
Europe/Tallinn	GMT+2:00
Europe/Tirane	GMT+1:00
Europe/Tiraspol	GMT+2:00
Europe/Uzhgorod	GMT+2:00
Europe/Vaduz	GMT+1:00
Europe/Vatican	GMT+1:00
Europe/Vienna	GMT+1:00
Europe/Vilnius	GMT+2:00
Europe/Volgograd	GMT+3:00
Europe/Warsaw	GMT+1:00
Europe/Zagreb	GMT+1:00
Europe/Zaporozhye	GMT+2:00
Europe/Zurich	GMT+1:00
GB	GMT0:00
GB-Eire	GMT0:00
GMT	GMT0:00
Greenwich	GMT0:00
Hongkong	GMT+8:00
Iceland	GMT0:00
Indian/Antananarivo	GMT+3:00
Indian/Chagos	GMT+6:00
Indian/Christmas	GMT+7:00
Indian/Cocos	GMT+6:30

Table continues...

Java Time Zone	GMT Offset
Indian/Comoro	GMT+3:00
Indian/Kerguelen	GMT+5:00
Indian/Mahe	GMT+4:00
Indian/Maldives	GMT+5:00
Indian/Mauritius	GMT+4:00
Indian/Mayotte	GMT+3:00
Indian/Reunion	GMT+4:00
Iran	GMT+3:30
Israel	GMT+2:00
Jamaica	GMT-5:00
Japan	GMT+9:00
Kwajalein	GMT+12:00
Libya	GMT+2:00
MET	GMT+1:00
MST7MDT	GMT-7:00
Mexico/BajaNorte	GMT-8:00
Mexico/BajaSur	GMT-7:00
Mexico/General	GMT-6:00
NZ	GMT+12:00
NZ-CHAT	GMT+12:45
Navajo	GMT-7:00
PRC	GMT+8:00
PST8PDT	GMT-8:00
Pacific/Apia	GMT+13:00
Pacific/Auckland	GMT+12:00
Pacific/Bougainville	GMT+11:00
Pacific/Chatham	GMT+12:45
Pacific/Chuuk	GMT+10:00
Pacific/Easter	GMT-5:00
Pacific/Efate	GMT+11:00
Pacific/Enderbury	GMT+13:00
Pacific/Fakaofu	GMT+13:00
Pacific/Fiji	GMT+12:00
Pacific/Funafuti	GMT+12:00
Pacific/Galapagos	GMT-6:00

Table continues...

Java Time Zone	GMT Offset
Pacific/Gambier	GMT-9:00
Pacific/Guadalcanal	GMT+11:00
Pacific/Guam	GMT+10:00
Pacific/Honolulu	GMT-10:00
Pacific/Johnston	GMT-10:00
Pacific/Kiritimati	GMT+14:00
Pacific/Kosrae	GMT+11:00
Pacific/Kwajalein	GMT+12:00
Pacific/Majuro	GMT+12:00
Pacific/Marquesas	GMT-9:-30
Pacific/Midway	GMT-11:00
Pacific/Nauru	GMT+12:00
Pacific/Niue	GMT-11:00
Pacific/Norfolk	GMT+11:00
Pacific/Noumea	GMT+11:00
Pacific/Pago_Pago	GMT-11:00
Pacific/Palau	GMT+9:00
Pacific/Pitcairn	GMT-8:00
Pacific/Pohnpei	GMT+11:00
Pacific/Ponape	GMT+11:00
Pacific/Port_Moresby	GMT+10:00
Pacific/Rarotonga	GMT-10:00
Pacific/Saipan	GMT+10:00
Pacific/Samoa	GMT-11:00
Pacific/Tahiti	GMT-10:00
Pacific/Tarawa	GMT+12:00
Pacific/Tongatapu	GMT+13:00
Pacific/Truk	GMT+10:00
Pacific/Wake	GMT+12:00
Pacific/Wallis	GMT+12:00
Pacific/Yap	GMT+10:00
Poland	GMT+1:00
Portugal	GMT0:00
ROK	GMT+9:00
Singapore	GMT+8:00

Table continues...

Java Time Zone	GMT Offset
SystemV/AST4	GMT-4:00
SystemV/AST4ADT	GMT-4:00
SystemV/CST6	GMT-6:00
SystemV/CST6CDT	GMT-6:00
SystemV/EST5	GMT-5:00
SystemV/EST5EDT	GMT-5:00
SystemV/HST10	GMT-10:00
SystemV/MST7	GMT-7:00
SystemV/MST7MDT	GMT-7:00
SystemV/PST8	GMT-8:00
SystemV/PST8PDT	GMT-8:00
SystemV/YST9	GMT-9:00
SystemV/YST9YDT	GMT-9:00
Turkey	GMT+2:00
UCT	GMT0:00
US/Alaska	GMT-9:00
US/Aleutian	GMT-10:00
US/Arizona	GMT-7:00
US/Central	GMT-6:00
US/East-Indiana	GMT-5:00
US/Eastern	GMT-5:00
US/Hawaii	GMT-10:00
US/Indiana-Starke	GMT-6:00
US/Michigan	GMT-5:00
US/Mountain	GMT-7:00
US/Pacific	GMT-8:00
US/Pacific-New	GMT-8:00
US/Samoa	GMT-11:00
UTC	GMT0:00
Universal	GMT0:00

Do Not Call Lists

Overview

A DNC list contains the contacts of the customers who do not want to receive calls or messages. You can import contact data of those customers in a DNC list.

 Note:

To ensure optimum performance and stability of POM, restrictions are imposed on number of parallel imports supported as well as on the number of contacts that can be imported or uploaded into the contact list at a time when POM is under high load. For more information on restrictions on imports, see *Avaya Proactive Outreach Manager Overview and Specification*.

If multi-tenancy is disabled, a common DNC list is available for the administrator or non-org user. When multi-tenancy is enabled then, POM automatically creates a separate DNC list for each organization. Depending on the user's organization and role, you can manage the org DNC list.

For example, if a user belonging to HR organization logs in, then the user can manage the DNC list belonging to the HR organization. Also, an org user is able to view contents of common DNC list.

User can associate a DNC list to a campaign that is assigned to as DNC groups and select multiple DNC lists per campaign. Also, you can apply DNC at campaign level. This option is enabled by default.

Adding a DNC list

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **DNC Lists**.
3. On the DNC Lists page, click **Add**.
4. On the Add New DNC List page, do the following:
 - a. Specify the name of the DNC list.
 - b. Specify the description of the DNC list.
 - c. Click **Save**.

Add New DNC List page field descriptions

Use this page to add or edit the details of a DNC list. You can add maximum 200 DNC lists.

Name	Description
Name	Enter the name of the DNC list.
Description	Enter a short description of the DNC list. This field is optional.

Add Multiple DNC Addresses/User Contact IDs/Customer IDs page field descriptions

Use this page to add multiple new DNC addresses, User Contact IDs, and Customer IDs. At a time, you can add a maximum of up to 20 addresses, User Contact IDs, or Customer IDs. When you add a phone number, the Country Specific Phone Settings, and the rejection patterns are applicable.

*** Note:**

When you add a phone number as a DNC address, ensure you add it with the country code, country code separator, and the phone number. If you do not add the country code, POM uses the default country code specified in the global configuration for applying Country Specific Phone Settings, and the rejection patterns.

Field or Button	Description
DNC for Days	Use the text box to enter the number of days for which you want POM to keep the address in the DNC List. After the days end, POM removes the address from the DNC List and the address becomes available for dialing. If you do not specify the number of days, then the address would be permanently added to the DNC list. The valid range for DNC for days is from 1 to 999. * Note: DNC Period is calculated based on the local time of the POM server. For example, if the user adds an address to DNC list today and specifies 1 day in the DNC for days field, then the address will be in DNC list till the midnight of the local time on POM server. After midnight, it would be removed from the DNC list and would be available for dialing.
DNC Address	Use the text box to enter the DNC address to add in the DNC list.
User Contact ID	Select the check box to mark the DNC Address as a User Contact ID.
Customer ID	Select the check box to mark the DNC Address as a Customer ID.
Actions	Click  to delete the address or text box.
Add more rows	Use the text box to enter the number of rows to add. You can enter 5 addresses by default. To add more, then enter a number in the range of 1–15 to add more rows to the table. You cannot add more than 20 addresses at a time.
Save	Use this to apply the validations and save the DNC addresses to the DNC list.

DNC lists page field descriptions

Use this page to view the DNC lists. You can add, view, manage, and empty a DNC list. You can view the registered DNC contacts.

Field or Button	Description
DNC List Name	Displays the DNC list name.
Total Addresses	Displays the total number of addresses in the given DNC list.
Last Updated	Displays the timestamp on which the DNC list was updated.
Actions	You can: - Click  to add DNC addresses in bulk. You can add up to 20 addresses at a time. - Click  to run a DNC data source import immediately. + Tip: In Progress means import job can be in any one of the states - Queued, Running, Error Occurred, File Copying, Pausing, Paused, Stopping, Waiting To Resume. The Total addresses count is updated after the completion of the import activity. * Note: After you run a DNC data source, the file is saved in <code>/opt/Avaya/avpom/POManager/archive/{OrgID/dncimport}</code> with a description of the type of import along with a timestamp added to the file name. - Click  to view all addresses on a DNC list. - Click  to manage the DNC data sources for the given DNC list. - Click  to empty the DNC list and remove all the DNC addresses. - Click  to view the registered DNC contacts with an address that matches a DNC address. - Click  to delete the DNC list. * Note: - The delete action is not available for auto generated Common and org DNC lists. - The system can take more time than expected to empty a DNC list in case of a large number of records. - You can use the <code>delete</code> MS-SQL query manually, to empty the DNC list. - It is recommended to empty the DNC list during the maintenance window or non-dialing hours. - Run the following query on a command prompt to delete records for DNC list ID 2: <pre>delete from pim_dnc where pim_dnc_list_id=2</pre>
Refresh	Click to refresh the page.

Table continues...

Field or Button	Description
Add	Click to add a new DNC list.
Last poll	Displays the time after refreshing the DNC Lists page.

Run DNC data source page field descriptions

This page lists all data sources configured for a given DNC list which are not in the running state.

Field or Button	Description
Selection Box	Use the selection box to select all configured data sources for the given DNC list.
DNC Data Source Name	Lists the names of all configured data sources for the given DNC list
Type	List the types of the DNC data sources. The types can be: Add DNC File-Local, Add DNC File- SFTP, Remove DNC File- Local, Remove DNC File- SFTP.
Last Executed	Displays the timestamp when the given data source was run for importing the DNC addresses.
Run Now	Click to run the selected data source immediately. After you run a DNC data source, the file is saved in <code>/opt/Avaya/avpom/POManager/archive/{OrgID/dncimport}</code> with a description of the type of import along with a timestamp added to the file name.

DNC List Details page field descriptions

Use this page to view all addresses, User Contact IDs, and Customer IDs added in the DNC list. You can also filter the records based on either the email address or the phone number.

Field or Button	Description
DNC Filter	
Showing Details For	Displays the name of the DNC list for which the records are displayed.
Enter DNC address	Use to specify the complete DNC addresses to search.
Search	Click to filter the records based on the criteria given in the Enter DNC address field.  Note: While searching DNC records, if you get an Internal Server error, then the error indicates that POM cannot complete the request before page time out. You can avoid getting the error by changing the page time out value in the <code>/etc/httpd/conf/httpd.conf</code> file. You must restart the <code>httpd</code> service, and the <code>tomcat</code> service for changes to take effect.

Table continues...

Field or Button	Description
Clear Search	Use to clear the search output and then display the entire list contents.
Page Number	Displays the current page number.
Total Pages	Displays the total number of pages in the DNC list.
Go To Page	Use the text box to specify a particular page you want to navigate.
Go	Use to navigate to the specified page number.
	Use to go to the first page.
	Use to go to the previous page.
	Use to go to the next page.
	Use to go to the last page.
ID Type	The type of the DNC address.
DNC Address	Displays the phone number or the email address.
DNC Addresses Added On	Displays the timestamp on which the address is added to the DNC list.
DNC Until	Displays the date and time until which the address is in the DNC list. If the address is added to the DNC list permanently, then the DNC Until field would be blank.
Actions	Use the  icon to delete the record.
Add DNC	Click to add a DNC address to the list.

Add Address/User Contact ID/Customer ID To DNC List page field descriptions

Use this page to add address, User Contact IDs, and Customer IDs to the DNC list. You can enter the phone number or the email address.

 Note:

When you add the phone number as a DNC address, ensure you enter the country code, country code separator, and the phone number. If you do not add the country code, POM uses the default country code specified in the global configuration for applying Country Specific Phone Settings, and the rejection patterns.

Field or Button	Description
Destination Phone/Email/User Contact ID/Customer ID	Use to specify the phone number, the email address, User Contact ID, or Customer ID.

Table continues...

Field or Button	Description
User Contact ID	Select the check box to mark the DNC Address as a User Contact ID.
Customer ID	Select the check box to mark the DNC Address as a Customer ID.
Add	Click to add an address to the DNC list. * Note: You must click Save to add the DNC address to the list.
Address list	Lists the DNC addresses.
ID Type	Lists the ID type of a DNC address.
Actions	Click  to delete the address.
DNC for Days	Use the text box to enter the number of days for which you want POM to keep the address in the DNC List. After the days end, POM removes the address from the DNC List and the address becomes available for dialing. If you do not specify the number of days, then the address would be permanently added to the DNC list. The valid range for DNC for days is from 1 to 999. * Note: DNC Period is calculated based on the local time of the POM server. For example, if the user adds an address to DNC list today and specifies 1 day in the DNC for days field, then the address will be in DNC list till the midnight of the local time on POM server. After midnight, it would be removed from the DNC list and would be available for dialing.
Save	Use to save the addresses.

Manage DNC List Data Sources page field descriptions

This page displays the name of the DNC list and its corresponding data sources.

Depending on your user role, you can add, change, delete, run, schedule, or view the details of the data source.

Field or Button	Description
Data Source Name	Displays the name of the data source of the DNC list.

Table continues...

Field or Button	Description
Type	Displays the import type of the data source as follows: • Add DNC File- Local • Add DNC File- SFTP • Remove DNC File- Local • Remove DNC File- SFTP
Last Executed	Displays the date and time when POM collects the latest data from the data source.
Actions	Click  to see the details of a data source.  Note: If you pause an active DNC import and change the filename or location, and resume the import, POM does not fetch records from the new file, but continues with imports from the old file. You must save the changes to take effect. Hence the summary shows old information. Changes in summary information reflects from next run of import. Click  to schedule an import of the data from the data source. Click  to delete a data source.
Add DNC Data Source	Click this button to add a new data source for a DNC list.

Adding DNC data source

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **DNC Lists**.
3. Click  to open the Manage DNC List Data Sources page.
4. Click **Add DNC Data Source**.
5. Specify the **Data Source Name** and **Data Source Description**.
6. Use the option button to specify to **Add Address** or **Remove Address**.
7. Specify to import the data using **Local File Import** or **SFTP**.

If you select **Local File Import**, specify the local path on the POM server.

Also, if you select **SFTP**, specify to use the **Secured** transfer, the **SFTP Host Name**, the **User Name**, the **Password**, and the **Remote Path**.

 Note:

You can upload contacts from files having either ANSI or UTF-8 format.

8. Use the **Check DNC phone address for reject pattern** and **Check DNC phone address for phone format rules** selection boxes to apply the validations to the phone numbers.

9. Click **Add** to add the DNC data source.

POM displays the

New DNC Data Source Added Successfully

message.

10. Click **OK** to return to the Manage DNC List Data Sources page.

Add DNC data source page field descriptions

Use this page to specify basic information about DNC data source such as name, description, and file properties.

Field or Button	Description
Import DNC Data Source Information	
DNC data source Name	A unique identifier for the DNC data source.
DNC data source Description	A brief description of the DNC data source. This field is optional.
What to Do	Use the option button to select: • Add Address: The phone numbers and or the email addresses are added to the DNC list. • Remove Address: The phone numbers and or the email addresses are removed from the DNC list.

Table continues...

Field or Button	Description
DNC File Location Type	Use to select one of the following file import options: • Local File - Select this option if the source file is located on the local POM system.  Note: For 8.1.1 and later versions of Avaya Experience Portal, when a user copies a file to the POM system with the Local File option, the owner and group values of the user id are assigned. All the permissions (read, write, and execute) for other users are removed. Therefore, you cannot copy a file with the Local File option as other users. To enable local file import for 8.1.1 and later versions of Avaya Experience Portal, do one of the following: - Make avayavp the owner of the file. - Include the user in the avayavp group. - Enable read permission for the other users for the file. • SFTP File - Select this option to import using the Secure File Transfer Protocol.
Upload Addresses From Following File	You see this field if in DNC File Location Type, you select Local File. In Local path on the POM server, specify the path from where you upload the file. The recommended path is <code>/opt/Avaya/avpom/POManager/public/{OrgID}/dncimport/{filename}</code>.  Note: If you want to add a User Contact ID or a Customer ID or add the address into a DNC list for a specific number of days, the file must be in the following format: For example, <pre>ID,ID_TYPE,EXC_DNC_UNTIL_X_DAYS 18,U,1 1549,C,5 749,C,2 optesting_@gmail.com,,4 45682-@avaya.com,,3 jkl@gmail.com,,1 4575224,u,1</pre> • ID: ID is the DNC address. For example, an email address, a phone number, the user contact ID, or the customer ID. • ID_TYPE: U or C, where U represents the user contact ID and C represents the customer ID. U or C are not case-sensitive. If the address is not of type user contact ID or customer ID, then keep this field blank. • EXC_DNC_UNTIL_X_DAYS: The days for which address is to be added into the DNC list. If you do not specify a value for EXC_DNC_UNTIL_X_DAYS, then POM permanently adds the address into the DNC list. You can import .csv files having either ANSI or UTF-8 encoding.

Table continues...

Field or Button	Description
DNC File Details	You see this field if in DNC File Location Type, you select SFTP. Specify the following parameters: • Secured: Use this check box to use a secure file transfer protocol for import. • SFTP Host name: Specify the hostname or IP address of the SFTP server. • User Name: Specify the username to connect to the SFTP server. • Password: Specify the password to connect to the SFTP server. • Remote Path: Specify the remote location of the file.
Advanced Options  Note: E-mail address format is verified if the format is correct.	
Check DNC phone address for reject pattern	If selected, then the global and country specific rejection patterns are applied and if the pattern matches, the phone number is not added or removed from the DNC list.
Check DNC phone address for phone format rule	If you select this option, the country-specific format rules are applied and if the length does not match, the phone number is not added or removed from the DNC list.
Add	Saves the DNC data source for the selected DNC list.

If the POM database restarts during an import, you might lose some data.

Edit DNC data source information page field descriptions

Use this page to edit the DNC data source.

You can edit the file location, SFTP related information, and username and the password for paused jobs. The changes are effective only for new import jobs that you run after saving the changes. The existing paused or active jobs run with the old values.

Field or Button	Description
Import DNC Data Source Information: You can see the following listed fields for all types of import. The first three fields are common across all imports. Additional fields might vary depending on the import type you choose.	
DNC Data Source Name	Displays the name of the DNC data source. You cannot edit the name.
DNC Data Source Description	Use to edit the DNC data source description.

Table continues...

Field or Button	Description
Check DNC phone addresses for reject pattern	Use the selection box to apply the reject patterns on the phone numbers
Check DNC phone addresses for phone format rule	Use the selection box to check the phone numbers for Country Specific Phone Settings rules.
 Note: If you choose import by SFTP you see the following listed fields:	
Secured	Use the selection check box to use a secured DNC import.
SFTP Host Name	Use to specify the hostname or IP address of the SFTP server.
User name	Use to specify the username to connect to the SFTP server.
Password	Use to specify the password to connect to the SFTP server.
Remote Path	Use to specify the path of the .csv file on the SFTP server.
 Note: If you choose import by local file you see the following listed fields:	
Local path on POM server (including file name)	Use to specify the path of the file on the POM server.
Save	The button to save the changes.

Import DNC data source information page field descriptions

Use this page to view the information of the selected DNC data source.

 Note:

If you pause an active DNC import and change the filename or location, and resume the import, POM does not fetch records from the new file, but continues with imports from the old file. You must save the changes to take effect. Hence the summary shows old information. Changes in summary information reflects from next run of import.

Field or Button	Description
Import DNC Data Source Information	
Data Source Name	Displays the name of the data source.
Data Source Description	Displays the DNC data source description.
Type	Displays the DNC data source type.

Table continues...

Field or Button	Description
Local Path on POM server	Displays the path of the DNC data source on the POM server.
You see the following fields if the DNC data source type SFTP:	
Secured	Displays the connection is secured or not.
SFTP Host Name	Hostname or IP address of the SFTP server.
User Name	Displays the username you specify to connect to the server.
Remote Path	Displays the path of the file.
Check DNC phone address for reject pattern	If set to True, then the global and country specific rejection patterns are applied and if the pattern matches, the phone number is not added or removed from the DNC list.
Check DNC phone address for phone format rule	If set to True, then the country specific format rules are applied and if the length does not match, the phone number is not added or removed from the DNC list.
OK	Use to accept the summary information and then returns to the Manage DNC List Data Sources page.

Manage DNC import data source schedules page field descriptions

Use this page to create, delete, pause, resume, and list the schedules of the DNC data source.

Field or Button	Description
Data Source Name	Displays the DNC data source name.
Type	Displays the DNC data source type.
 Note: You see following fields if you have at least one schedule created.	
Schedule Id	Displays the schedule ID.
Frequency	Displays the frequency of the DNC import.
Start Time	Displays the start time of the DNC import.
End Time	Displays the end time of the DNC import.

Table continues...

Field or Button	Description
Actions	Click  to pause the DNC import.  Note: If you have any DNC data source in running, paused or error state then you cannot run another instance of the same DNC data source. Click  to resume the DNC import. Click  to delete the schedule.
Add	Use to add a schedule for DNC import.

Schedule creation page field descriptions

Use this page to create a recurring or run once schedule for the selected DNC data source.

 Note:

While scheduling data sources, if the data source schedule falls in the shift window with the Daylight Savings time (DST) clock change, the schedule for the data source does not run.

If there are any country specific changes to the existing time zones, such as, addition of new time zones, changes to the Daylight Savings Time (DST) rules, you must delete and re-create a schedule.

For example, Russia has announced some changes to the standard time zones with effect from 26 October 2014. If any of your data import falls in the changed time zones, you must delete and re-create the schedules so that the import jobs continue to run properly.

The time zone field in the schedule is used to specify the schedule start time with respect to the specified time zone. The system converts the schedule start time to the current POM system time and runs the schedule as per the time on the POM server. The POM system scheduler honors the DST of the current POM server and not the time zone mentioned while creating the schedule. The system does not run the scheduled activities if the campaign director process is not running.

Field or Button	Description
Start Date & Time	
Date	Click  to specify the start date for the scheduled import or type the date manually.
Time	Use the text boxes to enter the start time for the schedule.
Time Zone	Use the drop-down list to specify the time zone for the date and time you specify to run the data source. POM converts the date and time to the POM system date and time after you create the schedule..
Recurrence	

Table continues...

Field or Button	Description
Recurring	Use the selection box to create a recurring schedule. Six frequencies are available for recurring schedules. • Run Every N Minutes: This option creates a job for the data source every N specified minutes. For example if you specify 15 then it creates jobs every 15 minutes. So if first job starts at 2000 hours then the second starts at 2015 hours and so on until the finish date. • Daily: This option creates a job daily at the start time you mention during scheduling and continues until the finish date. • Weekdays only: This option creates a job on all days of the week except the weekend days that you mention in the Proactive Outreach > Manager > Configurations > Global Configurations > Weekend days field. • Weekly: This option creates jobs on selected days in a week. For example, if you select Wednesday, then the weekly jobs are created on Wednesday at the start time mentioned during schedule and so on until the finish date. • Monthly: This option creates the jobs monthly depending on the start date until the finish date. • Yearly : This option creates the jobs yearly depending on the start date until the finish date.
The following field is available only if you check the Recurring selection box.	
Finish Date	Use to specify the finish date for the schedule. Click the date picker or type the date manually.
Time	Use to specify the finish time for the schedule.
Create	Click to create the schedule.

DNC Registered Contact Details page field descriptions

Use this page to view the contact record details matching with the current DNC list addresses.

 Note:

For a DNC address, if you enter more than one phone number, email address or both for the same contact record in the DNC list, the contact record is listed multiple times in the list. For example, if a DNC list has information for phone1, phone 2, and email address for the same contact record, the record details are listed three times in the list.

Field or Button	Description
DNC Filter	
Showing Contact Details For	Displays the name of the DNC list for which the records are displayed.
Enter DNC address	Use this field to specify the phone number or the email address of a record.

Table continues...

Field or Button	Description
Search	Click to filter the records based on the criteria given in the Enter DNC address field .
Clear Search	Use to clear the search output and display the entire list contents.
Page Number	Displays the current page number.
Total Pages	Displays the total number of pages required to list all DNC addresses.
	Use to go to the first page.
	Use to go to the previous page.
	Use to go to the next page.
	Use to go to the last page.
ID Type	The type of the DNC address.
First Name	Displays the first name of the record.
Last Name	Displays the last name of the record.
DNC Address	Displays the value of the matching address of the record.
Contact List Name	Displays the name of the contact list to which the record belongs.
DNC Address Added On	Displays the date and time when the address was added to the DNC list.
DNC Until	Displays the date and time until the address remains in the DNC list.
Actions	Click  to delete the address from the DNC list.

DNC Groups

DNC Groups page field descriptions

This page displays the list of DNC groups. Depending on your role, you can perform the following actions:

- Add a new DNC group.
- Edit or delete a DNC group.
- Associate DNC lists to a DNC group.

You can add maximum 200 DNC list groups.

Field Name	Description
New DNC Group	Click to add a new DNC group.
Delete	Click to delete a DNC group.
Search DNC Groups	Use to search a DNC Group using the name of the group.
Filter 	Click to perform advanced search. The following fields are displayed when you click Filter : • Column Name • Operator • Search Text
Column Name	Use the drop down list to select the criteria using which you want to search the DNC group record. You can specify the search criteria using one of the following options: • Name • Organization
Operator	Use the drop down list to specify an operator. You can use any one of the following operators: • = (equal to) • != (not equal to) • in • contains • begins with • ends with
Search Text	Use the text box to specify the search criteria value.
Refresh 	Click to clear the search.
Actions 	Displays the following options for the actions you can perform on the DNC Group: • Edit: To edit the details of a DNC Group. • Delete: To delete a DNC Group.
Name	Displays the DNC group name.
Organization	Displays the organization associated with the DNC group. This field is visible only if multitenancy is enabled on Avaya Experience Portal.
Description	Displays the description of the DNC group.
Last Updated	Displays the time when you last updated the DNC group.
Page	Displays the current page number.
Show	Use the drop down to specify the number of records to be displayed per page.

Adding a DNC group

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **DNC Groups**.
3. On the DNC Groups page, click **Add**.
4. In the Add Group dialog box, do the following:
 - a. Enter the **Name** of the DNC group.
 - b. Enter a **Description** of the DNC group.

This is an optional field.
 - c. Click **Add**.

New DNC Group page field descriptions

Use this page to add a new DNC group or edit the details of an existing DNC group.

Table 4: Details tab

Field	Description
Name	Name of the DNC group.
Description	Short description of the DNC group.

Deleting a DNC group

Before you begin

Configure at least one DNC group.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **DNC Groups**.
3. On the DNC Groups page, select the check box next to the DNC group that you want to delete.
4. Click **Delete**.

Assigning DNC lists to a DNC group

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **DNC Groups**.
3. On the DNC Groups page, click the  icon of the DNC group to which you want to assign DNC lists.

4. On the DNC Lists To Group Assignment page, to assign DNC lists to the DNC group, do the following:
 - a. In the **Available Lists** selection box, select the DNC lists that you want to add to the DNC group.
You can assign multiple DNC lists to a DNC group.
 - b. Click  to assign the selected DNC lists to the DNC group.
 - c. Click  to assign all DNC lists to the DNC group.
5. To assign a default DNC list to the DNC group, select a DNC list from the **Default DNC List** drop-down list in the Default DNC List pane.
6. Click **Save**.

DNC Lists To Group Assignment page field descriptions

Use this page to associate DNC lists to a DNC group. You can associate maximum 20 DNC lists per DNC group.

Field or button name	Description
Available Lists	The area displays the names of available DNC lists. To select and associate one or more lists from the available DNC lists, do one of the following: - To move a DNC list from Available Lists to Selected Lists, click  corresponding to that list. - To move all DNC lists from Available Lists to Selected Lists, click Add All
Selected Lists	The area displays the selected DNC lists that are associated to a DNC group. To remove one or more lists from the selected DNC lists, do one of the following: - To move a DNC list from Selected Lists to Available Lists, click  corresponding to that list. - To move all DNC lists from Selected Lists to Available Lists, click Remove All.
Default DNC List	The dropdown list to select the DNC list when DNC updates are performed in a campaign using this selected group. If you do not select a default DNC list, the selected DNC group cannot be assigned in the campaign because the DNC group is required for Agent or Web Service updates.
Cancel	Click to cancel the changes.
Save	Click to save the changes.

File Splitters

Overview

This feature supports splitting an import file based on splitting criteria defined in a filter template. You can define the splitting criteria before you import a file into POM. You can split an import file of CSV format based on the splitting criteria, and the resulting files are imported as individual contact lists as defined by the administrator. You can split an import file up to 50 individual contact lists and import the file into POM.

 Note:

To ensure optimum performance and stability of POM, restrictions are imposed on number of parallel imports supported as well as on the number of contacts that can be imported or uploaded into the contact list at a time when POM is under high load. For more information on restrictions on imports, see *Avaya Proactive Outreach Manager Overview and Specification*.

File splitter enables POM to do the following:

- Handle large files that contain data for multiple contact lists.
- Use predefined criteria from the filter templates to divide a large file into multiple contact lists.
- Upload these import files in the previously existing contact lists.

Adding file splitters

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **File Splitters**.
3. On the File Splitters page, click **New File Splitter**.
4. On the New File Splitter page, add relevant information, and click **Save**.

Related links

[New / Edit File Splitter page field descriptions](#) on page 487

New / Edit File Splitter page field descriptions

Field	Description
Name	Use to specify the name of the file splitter.  Note: - You cannot edit this field after you save the file splitter. - You can use a maximum of 40 characters in this field. - You cannot use the following characters: - white space - ~ - ^ - ` - ! - # - \$ - ' - ; - \ - " - < - >
Description	Use to specify the description of the file splitter.  Note: This field is optional.
Organizations	Use to associate organization with a file splitter. To associate organizations, add the required organizations from the Available Organizations list to the Selected Organizations list. To do the following tasks, use the following actions: - To add an organization from the Available Organizations to the Selected Organizations, click . - To remove an organization from the Selected Organizations to the Available Organizations, click . - To add all organizations from the Available Organizations to the Selected Organizations, click Add All. - To remove all organizations from the Selected Organizations to the Available Organizations, click Remove All.

Table continues...

Field	Description
Criteria	Use to add the Filter Template, Contact List, and Zone. The maximum number of splitter criteria allowed is 50. Use the following actions to do the following tasks: • Add Criteria - Use to add new criteria. •  - Use to delete criteria.  Note: If a splitter is configured for a for a large number of contact lists (for example, 50 contact lists), do not run the splitter out of dialing order to avoid performance impact on the POM system.
Split Contacts from following file - Select Local File Import or SFTP File Import. Maximum of 2 GB master file size is allowed. Encoding format UTF-8 is supported.	

Table continues...

Field	Description
Local File	Use this option if the source file is on the local machine. On the POM server, specify the path of the local machine from where the file uploads. To import a file, ensure that the <code>avayavp</code> user has the READ permission for the following: • The file. • The parent directories of the file. To enable or disable the permission, the root user can use the <code>chmod 455</code> command. Ensure that you use the <code>chmod</code> command to assign the READ permission to all the directories individually on the path. You can import the <code>contacts.csv</code> file from the following location: <pre>/home/craft/Contacts/Files/Today/contacts.csv</pre> The <code>contacts.csv</code> file can contain custom attributes. If the custom attributes are present in the <code>.csv</code> file, create the attributes with the correct data types on the POM system before you run the splitter.  Note: You can import <code>.csv</code> files with the ANSI or the UTF-8 encoding format. To split a file, an <code>avayavp</code> user must have the READ permission for the following: • The file. • The folder in which the user copies the file.
Local path on the POM server (Including file name)	Specify the local path on the POM server. The path must include the name of the <code>.csv</code> file.
SFTP File	Type text in the following fields: • SFTP host name • Username • Password • Remote path For a secure connection, enable the Secured option.

Table continues...

Field	Description
How are fields separated from each other ?	Select one of the following options: • Comma(,) • Tab • Colon(:) • Semicolon(;) • Vertical slash(\) • Other: Type the option in the text box.  Note: The following are the invalid separators: • Period (.) • # • \$ • & • % • / • "

Table continues...

Field	Description
Advanced Options	Select the following options as required: • Empty Contact List before import: Select this check box to empty the contact lists before importing data in the list. The following options are available after you select this check box. Select the following options as required: - Pause Associated Campaigns if Emptying Contact List: If you select this check box, all the running campaigns associated with the contact lists pause, the contact list gets emptied, and the paused campaigns resume.  Caution: Do not use this option when dialing is in progress. If the campaign jobs fail to pause within a stipulated timeout interval, the campaign jobs might remain in PAUSING/PAUSED state until the jobs are manually resumed. - Ignore Active Exclude Contacts if Emptying Contact List: If you select this check box, the contact list gets emptied keeping all the active exclude contacts in the contact list.  Note: If you do not select this option, all the excluded contacts are emptied from the contact lists. - Ignore Callback On Contacts if Emptying Contact List: If you select this check box, the contact list gets emptied, keeping all the callbacks on the contacts in the contact list.  Note: If you do not select this option, all the excluded contacts are emptied from the contact lists.  Note: For the descriptions of the following fields, see New Data Source first page field descriptions on page 339. • Automatically update time zone for phone numbers • Check phone numbers for reject patterns • Check phone numbers for phone formats rule • Check phone numbers/E-Mails for DNC • Clean up non numeric characters from phone numbers • Empty phone on match with reject patterns or phone formats rule

Table continues...

Field	Description
	• Empty invalid e-mail addresses • On duplicate record found, select any of the following: - Update existing contact - Ignore new contact • The following advanced options are available if the advanced guard time is enabled: - Automatically update state for phone numbers - Automatically update wireless for phone numbers  Note: Advanced guard time is enabled by default.

Related links

[Adding file splitters](#) on page 486

File Splitters page field descriptions

This page displays the lists of splitters created for splitting files into contact lists. Depending on your user role, you can add, change, delete, analyze, preview, run, and schedule a splitter.

Field or Button	Description
New File Splitter	Use to add a new file splitter.
Search File Splitter	Use to specify a file splitter name to search.

Table continues...

Field or Button	Description
	Use to go to the advanced search option to apply the following filter options: • Column Name: Use the list to select one of the following search criteria options: - Name - Organizations - Contact Lists • Operator: Use the list to select one of the following operators to specify the search criteria: - Equal to (=) - Not Equal to (!=) - in - like - not like • Search Text: Use to specify the text according to the selected Column Name and Operator.
	Use to clear the search.
ID	Displays the ID of a file splitter.
Name	Displays the name of a file splitter.
Organizations	Displays the name of the associated organizations.
Contact Lists	Displays the contact lists details.
Last Executed	Displays the date and time when a file splitter is last executed.
Unfiltered Records File Path	Displays the name and the complete path of a file with the records not filtered by any filter criteria. POM displays these data after the splitter is executed or analyzed.  Note: The path and the file name created when the last splitter is executed or analyzed may not be valid if the filename or file path is deleted due to purging.

Table continues...

Field or Button	Description
Status	Displays one of the following statuses of a file splitter: • New • Analyzing • Analyzed • Running • Completed • Failed • Partially Executed • Failed - File not found • Failed - Source is a directory • Failed - File size is more than configured • Failed - splitter already running • Failed - Incorrect Username or Password

Table continues...

Field or Button	Description
Actions	Depending on your user role, you can perform the following actions for managing the splitters. • Use  view more options such as Preview, Analyze, Run, Schedule, Edit, and Delete. • Use Preview to preview a splitter. The Preview action displays the count of contacts that are available in the splitter file. This file can be downloaded. • Use Analyze to analyze a splitter. Use this option to do the following tasks: - Copy the file from the source location. - Apply filter criteria sequentially on the file. - Split the file into multiple files to preview the data.  Note: - After analysis, this file is available for preview or download. - The split file remains in the POM system according to the configured purge schedule. • Click Run to run a splitter immediately without creating a schedule. Use this option to import the split files to create contact list and moves the <code>.csv</code> file into the archive directory. • Click Schedule to schedule a splitter. Use this option to create a schedule to run the file splitter once or on a recurrent basis. • Click Delete to delete the splitter.

Editing file splitters

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **File Splitters**.
3. On the File Splitters page, do one of the following:
 - Under the **Name** column, click the file splitter to change the required fields.
 - Under the **Name** column, point to the required file splitter and click  and click **Edit** to change the required fields.
4. Click **Save**.

Related links

[New / Edit File Splitter page field descriptions](#) on page 487

Previewing file splitter**About this task**

Use this procedure to display the count of contacts that split into contact lists when you run the file splitter. These contacts are displayed according to the selected filter against each contact list. The download option provides a `csv` file containing the split and filtered contacts to the user.

 Note:

The **Preview** option is available after you analyze the file splitter.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **File Splitters**.
3. On the File Splitters page, point to the required file splitter and click  and click **Preview**.

Related links

[Preview Splitter page field descriptions](#) on page 496

Preview Splitter page field descriptions

Name	Description
Filter Templates	Displays the name of the filter template used.
Contact List	displays the name of the contact list used.
Zone	Displays the name of the Zone for the contact list.
Status	Displays one of the following execution status details for a contact list: • Success • Error in ContactList creation • Error in DataSource creation • Error in Import • Error in Assigning Organization • Import already Running • No Records To Import • General Error
Count	Number of records displayed based on the filter template applied.

Table continues...

Name	Description
Remaining Records	The number of records in which the file splitter criteria is not matched.
Failed Records	The records which could not be analyzed.  Note: Check <code>PIM_ALMService.log</code> for the list of reasons for failed records.
Actions	- Click Run to run a splitter immediately without creating a schedule. Use this option to import the split files to create contact list and moves the <code>.csv</code> file into the archive directory. - Use  view more options such as Preview, and Download. - Click Preview to view the filtered contact records for the contact list. The attribute for which the mask for users option is selected, the value of the attribute displayed is masked. - Click Download to download the <code>CSV</code> file. The download option is available based on the role defined.

Related links

[Previewing file splitter](#) on page 496

Creating a schedule for splitters

About this task

Use this procedure to create a recurring or run-once schedule for a file splitter.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **File Splitters**.
3. On the File Splitters page, point to the required file splitter and click  and click **Schedule**.
4. On the Schedule page, click **New Schedule**.
5. In the New Schedule dialog box, add relevant information, and click **Save**.

Related links

[New Schedule dialog box field descriptions](#) on page 497

New Schedule dialog box field descriptions

Use this dialog box to create a recurring or run-once schedule for a file splitter.

Field or Button	Description
Start Date & Time	Use to specify the schedule start date and time. Use the calendar wizard and the time-picker to select the date and the time. You can specify the time in 24-hour clock format.
Time Zone	Use the list to specify the time zone.
Recurring	Enable this option for creating a recurring schedule and specifying the recurring details. After you enable the Recurring option, the following fields are available: • Frequency: Use to select one of the following recurring frequencies: - Run Every N Minutes: This option creates a job for the contact data source for every N specified minute. For example, if you specify 45, it creates jobs every 45 minutes. So, if the first job starts at 12:00 hours, the second job starts at 12:45 hours and this continues until the finish date. - Daily: This option creates a job daily at the start time you mention during scheduling and continues until the finish date. - Weekly: This option creates jobs on selected days in a week. For example, if you select Monday and Friday, the weekly jobs are created on Monday and Friday at the start time mentioned during the schedule and this continues until the finish date. - Monthly: This option creates the jobs monthly depending on the start date until the finish date. - Yearly: This option creates the jobs yearly depending on the start date until the finish date. • weekdays Only: Use this recurring-frequency option to create a job on all days of the week except the weekend days that you specify in the Manager > Configurations > Global Configurations > Weekend days field. • Finish Date & Time: Use to specify the finish date and time for the schedule. Use the calendar wizard and the time-picker to select the date and the time. You can specify the time in 24-hour clock format.

Related links

[Creating a schedule for splitters](#) on page 497

Schedule page field descriptions

This page displays the list of schedules created for splitter. Depending on your user role, you can create or delete schedules for the selected splitter.

Field or Button	Description
File Splitter Name	Displays the file splitter name selected to create a schedule.
ID	Displays the schedule ID.

Table continues...

Field or Button	Description
Frequency	Displays the frequency of the data import.
Start Time	Displays the start time of the data import.
End Time	Displays the end time of the data import.
Status	Displays if the data source schedule is in running or pause state.
Actions	Use Delete to delete the schedule.
New Schedule	Use to add a new schedule.

Export Contacts

Exporting Contacts from a database

About this task

Use this procedure to:

- Export contact information from a contact list and save the exported information in a .csv file.
- Specify the information about the database that contains contact lists, select a contact list, and export contacts from the contact list based on selected attributes.
- Export contacts stored in a database that is currently used by POM.
- Export contacts stored in a database that is different than the one currently used by POM. That database must have same schema as POM.

Users can download this file after the export operation is complete.

To export contacts, the user must have the Export Contacts role.

Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Contacts** menu, click **Export Contacts**.
POM displays the Export Contacts page.
3. **(Optional)** To select the POM database, select the **Use POM current DB** check box if you want to export contacts from the currently active POM database.
If you select this option, then all the other fields are unavailable.
4. To select an external database, type information in the following fields
 - **Database**
 - **Database Host Name**
 - **Database Name**

- **Database Port Number**
 - **Database User Name**
 - **Database Password**
5. To verify whether POM can connect to the database, click **Test Connection**.
- If POM connects to the database, POM displays the following message:
- ```
Connection to the database is successful.
```
6. Click **Show Contact Lists**.
- POM displays the Contact Lists page.
7. In the **Contact List Name** column, select a contact list.
- POM displays all the attributes associated with the selected contact list.
8. In the **How are fields separated from each other** area, select a delimiter from the following options:
- **Comma(,)**
  - **Tab**
  - **Colon (:)**
  - **Semicolon (;)**
  - **Pipe(|)**
  - **Other (You must type a special character in the field)**
9. In the **Select the attributes to include in the export** area, do the following:
- a. To move an attribute from the **Available Attributes** list to the **Selected Attributes** list, select the attribute and click **+**.
  - b. To move all attributes from the **Available Attributes** list to the **Selected Attributes** list, click **Add All**.
  - c. To remove an attribute from the **Selected Attributes** list to the **Available Attributes** list, select that attribute and click **-**.
  - d. To remove all attributes from the **Selected Attributes** list to the **Available Attributes** list, click **Remove All**.

Ensure that you arrange the attributes in the order in which the file is to be exported. The ID attribute will always appear as the first column in the export file regardless of its specified order.

Note: If you do not select any attributes, then this button is disabled. When the export is in progress, the user should not close or refresh the page or navigate to any other page, else the export operation aborts and the export operation will have to be restarted. The export file generated and downloaded once, will not be available if the user navigates to any other page and navigates back to the export page. To download the export file, user has to export the file again.

10. Click **Export**.

POM exports the contacts from the contact list with the selected attributes.

## Export Contacts page field descriptions

| Field or button           | Description                                                                                                                                                                                                                                                                                                                                                                                |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Use POM current DB</b> | Select the check box if you want to export contacts from the currently active POM database.<br><br>If you select this option, then all the other fields are unavailable.                                                                                                                                                                                                                   |
| <b>Database</b>           | Specify the type of the database that contain the contact lists from which you want to export contacts.<br><br>The options in the list are Postgres, Oracle, MS-SQL.<br><br>The schema of the external database must be the same as the schema of the POM database.                                                                                                                        |
| <b>Database Host Name</b> | The hostname or IP address of the external database.                                                                                                                                                                                                                                                                                                                                       |
| <b>Database Name</b>      | Use to specify the name of the database that contains the information about the contact lists.<br><br>Note:<br>You cannot use the following characters: <ul style="list-style-type: none"> <li>• white space</li> <li>• ~</li> <li>• ^</li> <li>• `</li> <li>• !</li> <li>• #</li> <li>• \$</li> <li>• '</li> <li>• ;</li> <li>• \</li> <li>• "</li> <li>• &lt;</li> <li>• &gt;</li> </ul> |

*Table continues...*

| Field or button             | Description                                                                                                                                                                                                                                                                                                                                                   |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Database Port Number</b> | <p>The port number to connect to the database.</p> <p>The default ports to connect to the database are:</p> <ul style="list-style-type: none"> <li>• 5432 to connect to Postgres database.</li> <li>• 1521 to connect to Oracle database.</li> <li>• 1433 to connect to MS-SQL database.</li> </ul>                                                           |
| <b>Database User Name</b>   | <p>The user name to connect to or log in to the database.</p> <p>Note:</p> <p>You cannot use the following characters:</p> <ul style="list-style-type: none"> <li>• white space</li> <li>• ~</li> <li>• ^</li> <li>• `</li> <li>• !</li> <li>• #</li> <li>• \$</li> <li>• '</li> <li>• ;</li> <li>• \</li> <li>• "</li> <li>• &lt;</li> <li>• &gt;</li> </ul> |
| <b>Database Password</b>    | The password to connect to or log in to the database.                                                                                                                                                                                                                                                                                                         |
| <b>Test Connection</b>      | <p>Click to test whether the connection to the database is successful.</p> <p>POM displays a message to indicate whether the connection to the database is successful or not.</p>                                                                                                                                                                             |
| <b>Show Contact Lists</b>   | Click to fetch all the contact lists from the database and display the contact lists on the page.                                                                                                                                                                                                                                                             |

## Contact Lists page field descriptions

This page displays all Contact Lists from the selected database.

You can select the contact list which you want to export.

POM exports the contacts from the contact list and saves them into a .CSV file.

| Button or field   | Description                                                                 |
|-------------------|-----------------------------------------------------------------------------|
| Contact List ID   | The identifier (number) of the contact list that is stored in the database. |
| Contact List Name | The name of the contact list stored in the database.                        |
| Total Contacts    | The total number of contacts in that contact list.                          |

## Attribute Selection page field descriptions

### Attribute Selection

POM displays the Attribute Selection page. Use this page to select attributes associated with the contact list which you want to export.



## Attribute Selection page field descriptions

| Name                                       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| How are fields separated from each other ? | <p>Choose a delimiter to separate the data.</p> <p>User can use one of the following delimiters or can provide a delimiter of their choice.</p> <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>• Comma(,)</li> <li>• Tab</li> <li>• Colon(:)</li> <li>• Semicolon(;)</li> <li>• Pipe( )</li> <li>• Other: Type the option in the text box.</li> </ul> <p> <b>Note:</b></p> <p>The following are the invalid separators:</p> <ul style="list-style-type: none"> <li>• Period (.)</li> <li>• #</li> <li>• \$</li> <li>• &amp;</li> <li>• %</li> <li>• /</li> </ul> <p>If the contact data contains the selected delimiter, then you need to manually append double quotes to the data which has the same delimiters.</p> <p>For example,</p> <div data-bbox="906 1339 1463 1619" style="background-color: #f0f0f0; padding: 10px;"> <p>Contact List Attributes - id, name, address, age</p> <p>Two contacts are:</p> <pre>1,Alex,'This is my address',45 2,Oanh,'This, is, Jane's, address',35</pre> <p>Now let's consider we have exported this list so that we will get data like below after export,</p> <pre>1,Alex,This is my address,45 2,Oanh,This, is, Jane's, address,35</pre> </div> <p>The data should be in the following format if it contains the delimiter:</p> <pre>2, Oanh, "This, is, Jane's, address", 35</pre> |

Table continues...

| Name                        | Description                                                                                                                                                                                                                                                                                                                                   |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                             | Note here that the second record contains delimiter(.). Therefore, this data is encapsulated in double quotes ("").                                                                                                                                                                                                                           |
| <b>Available Attributes</b> | Displays the list of attributes associated with the contact list.<br><br>You can select multiple attributes and can move the attributes to the selected attributes list.                                                                                                                                                                      |
| <b>Selected Attributes</b>  | Displays the list of attributes selected to be exported.<br><br>You can specify the order in which the attributes are exported.<br><br>Ensure that you arrange the attributes in the order in which the file is to be exported. The ID attribute will always appear as the first column in the export file regardless of its specified order. |
| <b>Add (+)</b>              | To move an attribute from the Available Attributes list to the Selected Attributes list, select the attribute and click (+).                                                                                                                                                                                                                  |
| <b>Add All (+)</b>          | To move all attributes from the Available Attributes list to the Selected Attributes list, click Add All (+).<br><br>Click to add all the attributes at once which you want to export.                                                                                                                                                        |
| <b>Remove (-)</b>           | To remove an attribute from the Selected Attributes list to the Available Attributes list, select that attribute and click (-).                                                                                                                                                                                                               |
| <b>Remove All</b>           | To remove all attributes from the Selected Attributes list to the Available Attributes list, click Remove All (-).                                                                                                                                                                                                                            |
| <b>Cancel</b>               | Click to navigate to Contact lists page.<br><br>If you click this button to go back, then a running or active export stops and cancels and you will have to perform the export again.                                                                                                                                                         |

*Table continues...*

| Name            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Export</b>   | <p>Click to start the export of the contact list.</p> <p>After POM verifies whether the selected attributes are correct, POM starts the export.</p> <p>After the export starts, POM displays the percentage of the completion of the export.</p> <p>Note: If you do not select any attributes, then this button is disabled. When the export is in progress, the user should not close or refresh the page or navigate to any other page, else the export operation aborts and the export operation will have to be restarted. The export file generated and downloaded once, will not be available if the user navigates to any other page and navigates back to the export page. To download the export file, user has to export the file again.</p> |
| <b>Download</b> | <p>Click to download the export file.</p> <p>After the export fully completes, POM shows the <b>Download</b> button.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

# Chapter 7: Managing Agents

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## Agent Address Book

### Agent address book overview

Use an agent address book to store frequently used numbers, allowed phone numbers, or SIP addresses. You can assign these numbers to different campaigns when you create campaigns. Use agent address book only if you run agent-based campaigns.

### Adding an address book entry

#### About this task

Add one address book entry at a time.

#### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Agents** menu, click **Agent Address books**.
3. On the Agent Address Books page, click **New Agent Address**.  
POM displays the New Contact page.
4. On the **New Contact** page, enter appropriate information.
5. Click **Save**.

#### Related links

[New contact page field descriptions](#) on page 507

### New contact page field descriptions

| Field or Button    | Description                                                                                                                                                                        |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b>        | Use to specify a name for the agent address book entry.                                                                                                                            |
| <b>Address</b>     | Use to specify an address for the agent address book entry. You can specify a phone number or a SIP address. For example, you can specify a SIP address as sip:abcd@pomsese42.com. |
| <b>Description</b> | Use to specify a brief description for the agent address book entry.<br><br>This is an optional field.                                                                             |

*Table continues...*

| Field or Button | Description                                                             |
|-----------------|-------------------------------------------------------------------------|
| <b>Save</b>     | Use to save the entry.                                                  |
| <b>Cancel</b>   | Use to cancel the procedure and return to the agent address books page. |

### Related links

[Adding an address book entry](#) on page 507

## Adding multiple entries to an address book

### About this task

Perform the following steps to add multiple entries to an address book simultaneously.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Agents** menu, click **Agent Address books**.
3. On the Agent Address books page, click **Add Multiple**.

POM displays the New Contacts (for multiple contacts) page. Use the **Add Contact** button to add more rows.

4. Type **Name** and **Address** for each contact.
5. (Optional) In **Description**, add a brief description.
6. Click **Save**.

## New contacts (for multiple contacts) page field descriptions

Use this page to add multiple new entries in the agent address book.

| Field or Button                                                                     | Description                                                                                                  |
|-------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| <b>Name</b>                                                                         | Specify a name for the agent address book entry.                                                             |
| <b>Address</b>                                                                      | Specify an address for the agent address book entry. You can specify either a phone number or a SIP address. |
| <b>Description</b>                                                                  | Specify a brief description for the agent address book entry.                                                |
| <b>Add Contact</b>                                                                  | Use to add new rows.                                                                                         |
|  | Use to delete the row corresponding to the icon.                                                             |
| <b>Save</b>                                                                         | Use to save the entry.                                                                                       |
| <b>Cancel</b>                                                                       | Use to cancel the procedure and return to the agent address books page.                                      |

## Agent Address Books page field descriptions

Use this page to add, delete, or modify address book entries.

| Field or Button                                                                                    | Description                                                                                                                                                                                                                                                                                                                                                          |
|----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>New Agent Address</b>                                                                           | Use to add new agent address book entry.                                                                                                                                                                                                                                                                                                                             |
| <b>Add Multiple</b>                                                                                | Use to add multiple agent address book entries.                                                                                                                                                                                                                                                                                                                      |
| <b>Delete</b>                                                                                      | Use to delete the agent address book entry.                                                                                                                                                                                                                                                                                                                          |
| <b>Search Agent Address Books</b>                                                                  | Use to enter the name of the agent address book to search.                                                                                                                                                                                                                                                                                                           |
| <b>Filter</b>     | Click to perform advanced search.<br>The following fields are displayed when you click <b>Filter</b> : <ul style="list-style-type: none"> <li>• <b>Column Name</b></li> <li>• <b>Operator</b></li> <li>• <b>Search Text</b></li> </ul>                                                                                                                               |
| <b>Column Name</b>                                                                                 | Select the column name based on which you want to perform the advanced search.<br>The following are the options: <ul style="list-style-type: none"> <li>• Name</li> <li>• Address</li> </ul>                                                                                                                                                                         |
| <b>Operator</b>                                                                                    | Click the operator you want to use to perform the advanced search.<br>The following are the options: <ul style="list-style-type: none"> <li>• Equal to (=)</li> <li>• Not Equal to (!=)</li> <li>• in</li> <li>• like</li> <li>• not like</li> </ul>                                                                                                                 |
| <b>Search Text</b>                                                                                 | Type the text you want to search.                                                                                                                                                                                                                                                                                                                                    |
| <b>Refresh</b>  | Click to clear the search.                                                                                                                                                                                                                                                                                                                                           |
| <b>Actions</b>  | The following are the options: <ul style="list-style-type: none"> <li>• Edit: To edit an agent address book entry.<br/>For more information, see <a href="#">Editing address book entry</a> on page 510.</li> <li>• Delete: To delete an agent address book entry.<br/>For more information, see <a href="#">Deleting address book entry</a> on page 510.</li> </ul> |
| <b>Name</b>                                                                                        | Displays the name of the entry.                                                                                                                                                                                                                                                                                                                                      |
| <b>Address</b>                                                                                     | Displays the address of the entry.                                                                                                                                                                                                                                                                                                                                   |
| <b>Description</b>                                                                                 | Displays the description of the entry.                                                                                                                                                                                                                                                                                                                               |

## Editing address book entry

### About this task

Perform the steps to edit an address book entry.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Agents** menu, click **Agent Address books**.
3. On the page Agent Address books, click the address book entry to edit.
4. Enter the values for **Name** and **Address**. You can also optionally add a brief description in **Description**.

For example, you can specify a SIP address as sip:abcd@pomsese42.com.

5. Click **Save**.

## Edit contact page field descriptions

Use this page to edit an existing entry in the agent address book.

| Field or Button    | Description                                                                                                                                                                        |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b>        | Specify a name for the agent address book entry.                                                                                                                                   |
| <b>Address</b>     | Specify an address for the agent address book entry. You can specify either a phone number or a SIP address. For example, you can specify a SIP address as sip:abcd@pomsese42.com. |
| <b>Description</b> | Specify a brief description for the agent address book entry.                                                                                                                      |
| <b>Save</b>        | Use to save the entry.                                                                                                                                                             |
| <b>Cancel</b>      | Use to cancel the procedure and return to the agent address books page.                                                                                                            |

## Deleting address book entry

### About this task

Perform the following steps to delete an address book entry.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Agents** menu, click **Agent Address books**.
3. On the Agent Address books page, do the following to delete an address book entry individually or to delete more than one entries simultaneously:
  - To delete an entry individually, click  corresponding to the agent and then click **Delete**.
  - To delete more than one entries simultaneously, click the selection boxes next to the entries, click **Delete** and in the Confirming Delete dialog box, click **Delete**.

# Agent Scripts

## Overview

For agent-based campaigns, agents may require scripts for questionnaires or gathering and updating information. You can create scripts with the embedded HTML script editor and assign the scripts to campaigns. If a script is located outside the POM environment on a different server, you can register the script as a URL on the POM server. Additionally, you can register a fail-over URL for the primary URL.

You can create two types of agent scripts, such as Native and URL. To reuse the script, you can save the script with a different name and customize the script.

### **Note:**

The reuse option is valid only for the Native type of agent scripts.

You can import or export a Native agent script. You can create or edit a Native type of agent script using a built-in editor. This editor lets you create your script and can add POM-specific attributes such as FirstName, LastName, and Phone 1.

For a URL type of agent script, specify the primary URL where the script belongs. If the primary URL does not function, you can also provide a fail-over URL.

To make the agent scripts work, you must add the POM server hostname and IP address in the `C:\WINDOWS\system32\drivers\etc\hosts` file on the agent's system.

Though the agent in ConfPassive or ConsultPassive state can update the attributes using POM, ensure that you update the attributes through the agent desktop.

If agent's system cannot complete running the tomcat services and the agent receives a new call, the system might not load the agent script. Therefore, the system displays the following error:

```
Displaying error 503, service temporarily unavailable
```

The agent must refresh the agent script page from the agent desktop, and after the system completes running the tomcat services, the agent can view the agent script.

You can write a custom javascript code for designing an agent script. You must replace the special character “+” with “\_PLUS\_CHAR\_” and “&” with “\_ampersand\_” when creating a custom javascript.

Native Agent Scripts are now enhanced for better security. This enhanced security can be turned off from the Global Configurations page.

## Creating agent scripts

### About this task

For the agent-based campaigns, agents can use agent scripts for questionnaires or for gathering and updating customer information. A POM Administrator can create these scripts with the embedded HTML script editor and assign it to campaigns. If a script is located on a different



server, outside the POM environment, then you can register the script as a URL on the POM server. Also, you can register a fail-over URL for the primary URL.

You can create two types of agent scripts; Native and URL.

- For Native type:

You can reuse the script by saving the script with a different name and customizing the script. You can also import or export a Native agent script. For creating or editing a Native type of agent script, you must work with the built-in editor. This editor allows you to create your script and also has the functionality to add POM specific attributes such as FirstName, LastName, Phone 1.

- For URL type:

You must specify the primary URL where the script belongs. If the primary URL does not function, you can also provide a fail-over URL.

## Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Agents** menu, click **Agent Scripts**.
3. On the Agent Scripts page, click **Add**.
4. In the **Select Agent Script Type** field, click one of the following:
  - URL
  - Native
5. In the **Name** field, type a name of the agent script.
6. Click **Continue**.
7. Create a script for the agent if you select the agent script type as Native. For more information about working with the editor, see [Working with the editor for adding or editing Native type agent scripts](#) on page 517.
8. In the **Primary URL** field, type the url of the primary server.
9. In the **Fail-over URL** field, type the url of the back-up server.
10. To check if the primary URL and the fail-over URL are functioning, click **Verify**.
11. **(Optional)** Select the **Encode URI** check box to send the encoded url to the agent desktop.

Use this step only if in the agent script type is configured as URL.
12. Click **Save**.

## Agent scripts page field descriptions

Use this page to manage the agent scripts based on your role.

**\* Note:**

When you replace the HTML content using the Agent Script Editor, ensure that you replace the content only between the body tags. Do not replace or change the existing Javascript code, but add new Javascript functions.

| Field or Button                                                                     | Description                                                                                                                                                                                                                                                |
|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Text Box</b>                                                                     | Use to specify the name of the agent script to search.                                                                                                                                                                                                     |
|    | Use to start the search.                                                                                                                                                                                                                                   |
|    | Use to clear or cancel the search.                                                                                                                                                                                                                         |
| You see the following fields when you click <b>Advanced</b> :                       |                                                                                                                                                                                                                                                            |
| <b>Select</b>                                                                       | Use the list to choose the search criteria. You can specify the search criteria using one of the following options: <ul style="list-style-type: none"> <li>• <b>Name</b></li> <li>• <b>Primary URL</b></li> <li>• <b>Fail over URL</b></li> </ul>          |
| <b>Select</b>                                                                       | Use the list to specify the operator for the search criteria. You can use the following operators: <ul style="list-style-type: none"> <li>• <b>Equal to (=)</b></li> <li>• <b>Not Equal to (!=)</b></li> <li>• <b>in</b></li> <li>• <b>like</b></li> </ul> |
| <b>Quick</b>                                                                        | Use to return from <b>Advanced</b> .                                                                                                                                                                                                                       |
| <b>Show</b>                                                                         | Use to display the search results. You can choose to view the number of results as 10, 20, 50, or all.                                                                                                                                                     |
| <b>Page</b>                                                                         | Use to display the current page number. You cannot change the value manually.                                                                                                                                                                              |
|  | Use to go to the first page.                                                                                                                                                                                                                               |
|  | Use to go to the previous page.                                                                                                                                                                                                                            |
| <b>Text Box</b>                                                                     | Use to specify a particular page to navigate.                                                                                                                                                                                                              |
| <b>Go</b>                                                                           | Use to navigate to the specified page number.                                                                                                                                                                                                              |
|  | Use to go to the next page.                                                                                                                                                                                                                                |
|  | Use to go to the last page.                                                                                                                                                                                                                                |
| <b>Name</b>                                                                         | Displays the agent script name.                                                                                                                                                                                                                            |
| <b>Type</b>                                                                         | Displays the type of the agent script.                                                                                                                                                                                                                     |
| <b>State</b>                                                                        | Displays the state of the agent script.                                                                                                                                                                                                                    |

*Table continues...*

| Field or Button      | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Primary URL</b>   | For URL type, displays the primary URL for the agent script. Primary URL and Fail over URL should not start with <, >, &, ", ', `, #, !.                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Fail Over URL</b> | For URL type, displays the fail-over URL if the primary URL is not functioning.                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Actions</b>       | <p>To reuse an agent script, you can use <b>Save As</b> or <b>Export</b>. You can also delete the agent script.</p> <ul style="list-style-type: none"> <li>Click  to save the script with another name.</li> <li>Click  to export the agent script.</li> <li>Click  to delete the agent script.</li> </ul> |
| <b>Add</b>           | Click to add a new agent script.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Import</b>        | Click to import the agent script.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

You see the following fields when you click **Import**:

| Field or Button            | Description                                    |
|----------------------------|------------------------------------------------|
| <b>Import Agent Script</b> |                                                |
| <b>Agent Script Name</b>   | Use to specify the name for the agent script.  |
| <b>File to Upload</b>      | Use to specify the path of the file to upload. |
| <b>Choose file</b>         | Click to browse to the file to upload.         |
| <b>Import</b>              | Click to import the agent script.              |

If you have a Native agent script, you can reuse the agent script using **Agent Script Save As**. You see the following fields when you click **Agent Script Save As**:

| Field or Button                                                                                                                                                                                                                                                                                              | Description                                           |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------|
| <b>Agent Script Save As</b>                                                                                                                                                                                                                                                                                  |                                                       |
| <b>Agent Script Name</b>                                                                                                                                                                                                                                                                                     | Displays the original agent script name.              |
| <b>Save As Name</b>                                                                                                                                                                                                                                                                                          | Use to specify a different name for the agent script. |
| <b>Save</b>                                                                                                                                                                                                                                                                                                  | Click to save the agent script with the new name.     |
| <b>Save As Template</b>                                                                                                                                                                                                                                                                                      | Use to save the agent script as Template.             |
| If you have a Native agent script, you can reuse the agent script using <b>Export Agent Script</b> . The system displays a dialog box asking to open or save the agent script. If you click <b>Save</b> , the system displays a folder structure to browse and select the location to save the agent script. |                                                       |

You see the following fields if you click **Add**:

| Field or Button            | Description |
|----------------------------|-------------|
| <b>Add an Agent Script</b> |             |

*Table continues...*

| Field or Button                 | Description                                                    |
|---------------------------------|----------------------------------------------------------------|
| <b>Select agent script type</b> | Use the list to select the type of the agent as URL or Native. |
| <b>New agent script name</b>    | Use to specify the name of the new agent script.               |
| <b>Continue</b>                 |                                                                |

If you select the agent script type as **URL**, you see the following fields:

| Field or Button                 | Description                                                                   |
|---------------------------------|-------------------------------------------------------------------------------|
| <b>Select agent script type</b> | Use to specify the name for the agent script.                                 |
| <b>New agent script name</b>    | Use to specify the name of the new agent script.                              |
| <b>New primary URL</b>          | Use to specify the primary URL.                                               |
| <b>Verify</b>                   | Click to verify if the primary URL is functioning.                            |
| <b>Fail over URL</b>            | Use to specify a fail-over URL if the primary URL does not function.          |
| <b>Verify</b>                   | Click to verify if the fail-over URL is functioning.                          |
| <b>Encode URL</b>               | Select to send the encoded url to show the agent script on the agent desktop. |
| <b>Save</b>                     | Click to save the agent script.                                               |

When you run a campaign where you specify the agent script as **URL**, you will see the following additional parameters:

| Field or Button               | Description                                                   |
|-------------------------------|---------------------------------------------------------------|
| <b>Session ID</b>             | Current POM session ID information.                           |
| <b>Agent Script ID</b>        | The script ID of the specific agent script.                   |
| <b>Destination IP Address</b> | The FQDN or IP address of Experience Portal system.           |
| <b>Contact List Name</b>      | The contact list associated with the campaign.                |
| <b>Agent ID</b>               | The ID of the logged-in agent.                                |
| <b>Agent Name</b>             | The name of the logged-in agent.                              |
| <b>Organization Name</b>      | The organization associated with the campaign.                |
| <b>User Name</b>              | The user that creates the job.                                |
| <b>User Contact ID</b>        | The unique ID of the imported contact that the user provides. |
| <b>Campaign Name</b>          | The campaign associated with the agent.                       |

If you select the agent script type as **Native script**, you see the following fields:

| Field or Button                 | Description                                       |
|---------------------------------|---------------------------------------------------|
| <b>Select agent script type</b> | Use to specify the name for the agent script.     |
| <b>New agent script name</b>    | Use to specify the name of the new agent script.  |
| <b>Use template</b>             | Use to select the agent script saved as template. |
| <b>Template</b>                 | Use the list to select the agent script.          |

*Table continues...*

| Field or Button | Description                                                                                                                                                                                                                                                                                                      |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Continue</b> | Click to continue to open the editor, where you can specify the parameters and the script details. After you update the script, click <b>Save</b> . For more information about working with the editor, see <a href="#">Working with the editor for adding or editing Native type agent scripts</a> on page 517. |

If you click the name of the agent script, you can edit the selected agent script. If the selected agent script is of type **URL**, you see the following fields:

| Field or Button          | Description                                                                       |
|--------------------------|-----------------------------------------------------------------------------------|
| <b>Edit Agent Script</b> |                                                                                   |
| <b>Agent Script Name</b> | Displays the name of the agent script. You cannot change the name once specified. |
| <b>New Primary URL</b>   | Displays the name of the primary URL. You can specify a different name.           |
| <b>Verify</b>            | Click to verify if the primary URL is functioning.                                |
| <b>Fail-over URL</b>     | Displays the name of the fail-over URL. You can specify a different name.         |
| <b>Verify</b>            | Click to verify if the fail-over URL is functioning.                              |
| <b>Encode URL</b>        | Select to send the encoded url to show the agent script on the agent desktop.     |
| <b>Save</b>              | Click to save the agent script.                                                   |

If you edit a Native type agent script, the system displays the editor to make changes to the script and then click **Save**. For more information about working with the editor, see [Working with the editor for adding or editing Native type agent scripts](#) on page 517.

## Accessing the agent script URL from a cross-site environment

### About this task

Use this procedure to add an access control header for the `POM Agent Script` so that a user can access from a cross domain.

### Procedure

1. To log on to the POM server with root or sroot user credentials, use the command prompt.
2. Navigate to the `$POM_HOME/bin` folder.
3. Run the following script:

```
./setHeadersForAgentScript.sh
```

This script sets headers for the `VP_POM_Agent httpd` setting to access the agent script URL from a cross-site environment.

4. Restart the httpd service for the change to take effect.

The system displays the following message:

```
Do you want to restart(y/n)
```

5. Type `y` and press `Enter`.

## Working with the editor for adding or editing Native type agent scripts

Use this page to add or edit a Native type of agent script using the editor. This is a built-in editor where you can use general editing functionality of an editor in addition to POM specific attributes.

Agent script editor has the provision to add HTML form elements, embed images, tables, hyperlinks and text formatting features.

User can leverage on the power and convenience of jQuery, which are linked with the Native Agent Script.

On the Agent Desktop, attributes that are tagged as `marked`, are displayed as `*****`. Attributes that are tagged as `Read-only` are unavailable in Agent Script Editor's `update attribute` and `update Multi-Attribute` plug-ins.

### Procedure

1. Click  to insert the system defined POM attributes in the script. For example, First Name.
2. Click  to update the system defined POM attribute. For example, Phone Number 1.
  - a. Select the contact attribute from the drop-down list.
  - b. Select the UI type from the drop-down list.
    - If you select the UI type as **Text**, then the system displays a text field where you can enter and update the value.
    - If you select the UI type as **Text Area**, then the system displays a text box where you can enter and update the value.
    - If you select the UI type as **Select**, then the system displays drop-down list where you can select the value.
  - c. Specify the button label to display to the agent using the **Update Button Label** field.
3. Click  to update multiple POM attributes at one time. For example, First Name, Salary, Address.
  - a. Select the contact attribute from the multiple select box.
  - b. Click the right arrow key to view the selected contact attribute and the left arrow key to clear the attribute.
  - c. In the Element Properties, specify the label to display to the agent.
    - If you select the UI type as **Text**, then the system displays a text field where you can enter and update the value.
    - If you select the UI type as **Text Area**, then the system displays a text box where you can enter and update the value.

- If you select the UI type as **Select**, then the system displays drop-down list where you can select the value.
  - d. Specify the **Button Name** to display to the agent.
4. Click  to update agent attributes. The values you update are at the agent level.

 **Important:**

You must define the agent attributes first in order to use them in the agent script.

- a. Select the agent attribute to update using the drop down list.
- b. Select a UI type to display on the screen. You can have the following UI types:
  - Button for Add operation: Use to display the Add button on the screen.
  - Button for Subtract operation: Use to display the Subtract button on the screen.
  - Button for Assign operation: Use to display the Assign button on the screen.
  - Make the input mandatory: Use to add validation and make the input mandatory.

For more information about updating the agent attribute and using the different UI types, see the *Examples* section.

5. Click  to update the campaign attributes. The values you update are at the campaign level.

 **Important:**

You must define the campaign attributes first to use them in the agent script.

- a. Select the campaign attribute to update using the drop down list.
- b. Select a UI type to display on the screen. You can have the following UI types:
  - Button for Add operation: Use to display the Add button on the screen.
  - Button for Subtract operation: Use to display the Subtract button on the screen.
  - Button for Assign operation: Use to display the Assign button on the screen.
  - Make the input mandatory: Use to add validation and make the input mandatory.

For more information about updating the campaign attribute and using the different UI types, see the *Examples* section.

6. Click **Save**.

 **Note:**

You can edit the form elements such as Text Area, Text Field, Radio button, Check box, and Selection field. However, POM does not support editing the properties of the form.

## Example

### Update agent attribute

For example, if you are running a collection type of campaign and to ensure how many agents collected how much amount, you can update the currency attribute. You can add the **Add**, **Subtract**, **Assign** buttons on the screen and also confirm that you always enter the currency attribute and never leave blank. The agents can then use the operation buttons on the screen and add values as the campaign runs. The **Add** button appends the value entered to the existing value. If the existing value is 50, and the agent types 50 and clicks **Add**, the system adds 50 to the existing value. The **Subtract** button also works in the same way. The **Assign** button overrides the existing value. If the agent types in 60 and clicks **Assign**, the system overrides the existing value and replaces the existing value with 60.

### Update campaign attribute

For example, if you are running a collection type of campaign and want to ensure how many much amount is collected at the end of the campaign, you can update the currency attribute. You can add the **Add**, **Subtract**, **Assign** buttons on the screen and also confirm that you always enter the currency attribute and never leave blank. The agents can then use the operation buttons on the screen and add values as the campaign runs. The **Add** button appends the value entered to the existing value. If the existing value is 50, and the agent types 50 and clicks **Add**, the system adds 50 to the existing value. The **Subtract** button also works in the same way. The **Assign** button overrides the existing value. If the agent types in 60 and clicks **Assign**, the system overrides the existing value and replaces the existing value with 60.

---

## Agent Attributes

### Overview

You can use agent attributes to track or monitor agent performance. Each agent attribute has a name and a data type. You can use only the Currency and Long data types for an agent attribute. You cannot change the name and data type of the agent attribute after creating or adding the agent attribute. POM can use the agent attributes through the native agent scripts or external scripts to monitor agent performance for a specific campaign.

For example, if you are running a blood donation campaign and you want to know the number of responses that an agent received, you can create an agent attribute <XYZ> with the Long data type. The agent increases, decreases, or updates the value of the <XYZ> agent attribute when the agent receives a response. In real time, through Supervisor Dashboard, the attribute values in the Agent Detail View show which agent received how many responses and track the agent performance.

If you are running a collection and want to know each agent's collection, you can create an agent attribute <ABC> with the Currency data type. The agent increases, decreases, or updates the value of the <ABC> agent attribute with the amount of funds collected. In real time, through Supervisor Dashboard, the attribute values in the Agent Detail View show each agent's collection.

You cannot delete an agent attribute if any native agent script is using the specified agent attribute or if any reporting tables have the specified agent attribute.

You can create more than one agent attribute for a given campaign, or you can use the same agent attribute for more than one campaign.



You can update the agent attributes using web services and agent scripts.

## Adding a new agent attribute

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Agents** menu, click **Agent Attributes**.
3. On the Agent Attributes page, click **New Agent Attribute**.
4. Specify values for the following fields:
  - **Attribute Name**
  - **Data Type**
  - **Description**
5. Click **Save**.

## Add new agent attribute field descriptions

Use this page to add a new agent attribute. You can add agent attributes with Long and Currency data types.

| Field or Button       | Description                                                                                                                                                                                                   |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Attribute name</b> | Specify a unique name for the agent attribute to add. Agent Attribute Name should not contain special characters like @, ~, ` , ! , ' , ; , , , # , \ , \$ , % , & , ( , ) , ? , " , < , > , { , } or spaces. |
| <b>Data type</b>      | Use the drop-down list to select the data type to associate with the agent attribute.                                                                                                                         |
| <b>Description</b>    | Specify a brief description about the agent attribute. Description should not contain special characters like ^ , ~ , ` , ! , ' , ; , , , \$ , # , \ , < , > , & , " .                                        |
| <b>Save</b>           | To save the changes.                                                                                                                                                                                          |
| <b>Cancel</b>         | To cancel the changes.                                                                                                                                                                                        |

## Agent attributes page field descriptions

This page displays the list of all existing agent attributes. Depending on your user role, you can add, change, or delete the agent attributes. If a multitenant user creates an agent attribute, POM associates the agent attribute to the user's organization.

| Field or Button                                                                                    | Description                                    |
|----------------------------------------------------------------------------------------------------|------------------------------------------------|
| <b>New Agent Attribute</b>                                                                         | Use to add a new agent attribute.              |
| <b>Refresh</b>  | Click to refresh the page.                     |
| <b>Name</b>                                                                                        | Displays the name of the agent attribute.      |
| <b>Data Type</b>                                                                                   | Displays the data type of the agent attribute. |

*Table continues...*

| Field or Button                                                                           | Description                                                                                                                                                                                |
|-------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>                                                                        | Displays the description of the agent attribute.                                                                                                                                           |
| Actions  | <p>The following are the options:</p> <ul style="list-style-type: none"> <li>• <b>Edit</b>: To edit an agent attribute.</li> <li>• <b>Delete</b>: To delete an agent attribute.</li> </ul> |

## Editing an agent attribute

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Agents** menu, click **Agent Attributes**.
3. On the Agent Attributes page, click the attribute to edit.
4. Edit the **Description** field.

You cannot edit the values for the **Attribute name** and **Data type** fields.

5. Click **Save**.

## Edit an agent attribute page field descriptions

Use this page to edit the description for the existing agent attributes. You cannot edit the name and the data type of the agent attribute.

| Field or Button       | Description                                            |
|-----------------------|--------------------------------------------------------|
| <b>Attribute name</b> | Displays the attribute name of the agent attribute.    |
| <b>Data type</b>      | Displays the data type of the agent attribute.         |
| <b>Description</b>    | Specify a brief description about the agent attribute. |
| <b>Save</b>           | To save the changes.                                   |
| <b>Cancel</b>         | To cancel the changes.                                 |

## Deleting an agent attribute

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Agents** menu, click **Agent Attributes**.
3. On the Agent Attributes page, click  corresponding to the agent attribute to delete and then click **Delete**.

The system displays a message to confirm the deletion of the agent attribute.

4. Click **Delete** to delete the agent attribute.

---

# Agent Configuration

## Overview

You can create agents and add agent properties such as agent ID, agent name, and agent organization. You can also import preconfigured agents.

## Adding an Agent

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Agents** menu, click **Agent Configuration**.
3. On the Agent Configuration page, click **New Agent**.
4. Type the appropriate values in the following fields:
  - **Agent ID**
  - **Agent Name**
  - **Organization**
5. Click **Save**.

## Add Agent page field descriptions

Use this page to add an agent.

| Field or Button     | Description                                                                                                                                                                                                             |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Agent ID</b>     | The specific identification of an agent.<br><br>The identification can be a number, a string, or alphanumeric.<br><br>The identification cannot contain invalid characters, such as !, @, #, \$, %, ^, &, *, (, ), etc. |
| <b>Agent Name</b>   | The name of the agent.                                                                                                                                                                                                  |
| <b>Organization</b> | The name of the organization(s) to which the agent belongs. This field is visible only if organization is enabled on Avaya Experience Portal.                                                                           |
| <b>Save</b>         | To save the agent.                                                                                                                                                                                                      |
| <b>Cancel</b>       | To cancel the procedure and return to the Agent Configuration page.                                                                                                                                                     |

## Agent Configuration page field descriptions

This page displays the list of agents. Depending on user role you can add or delete agents.

| Field or Button                                                                                    | Description                                                                                                                                                                                                                                                                                                                |
|----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>New Agent</b>                                                                                   | To add a new agent.                                                                                                                                                                                                                                                                                                        |
| <b>Delete</b>                                                                                      | To delete an agent.                                                                                                                                                                                                                                                                                                        |
| <b>Import Agents</b>                                                                               | To import agents from the following options: <ul style="list-style-type: none"> <li>• Communication Manager</li> <li>• A local CSV file</li> <li>• AACC, if POM is installed in AACC mode.</li> </ul>                                                                                                                      |
| <b>Assign Organization</b>                                                                         | To assign agent(s) to an organization. This button is visible only if organization is enabled on Avaya Experience Portal.                                                                                                                                                                                                  |
| <b>Search Agent</b>                                                                                | Use this field to search an agent.                                                                                                                                                                                                                                                                                         |
| <b>Filter</b>     | Click to perform advanced search.<br>The following fields are displayed when you click <b>Filter</b> : <ul style="list-style-type: none"> <li>• <b>Column Name</b></li> <li>• <b>Operator</b></li> <li>• <b>Search Text</b></li> </ul>                                                                                     |
| <b>Column Name</b>                                                                                 | Select the column name based on which you want to perform the advanced search.<br>The following are the options: <ul style="list-style-type: none"> <li>• Agent ID</li> <li>• Agent Name</li> <li>• Agent Organizations</li> </ul>                                                                                         |
| <b>Operator</b>                                                                                    | Click the operator you want to use to perform the advanced search.<br>The following are the options: <ul style="list-style-type: none"> <li>• Equal to (=)</li> <li>• Not Equal to (!=)</li> <li>• in</li> <li>• contains</li> <li>• begins with</li> <li>• ends with</li> <li>• is null</li> <li>• is not null</li> </ul> |
| <b>Search Text</b>                                                                                 | Type the text you want to search.                                                                                                                                                                                                                                                                                          |
| <b>Refresh</b>  | Click to clear the search.                                                                                                                                                                                                                                                                                                 |

| Field or Button                                                                           | Description                                                                                                                                                                                                             |
|-------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Actions  | The following is the option:<br><ul style="list-style-type: none"> <li>To delete an agent.</li> </ul>                                                                                                                   |
| <b>Agent ID</b>                                                                           | The specific identification of an agent.<br><br>The identification can be a number, a string, or alphanumeric.<br><br>The identification cannot contain invalid characters, such as !, @, #, \$, %, ^, &, *, (, ), etc. |
| <b>Agent Name</b>                                                                         | The name of the agent.                                                                                                                                                                                                  |
| <b>Agent Organizations</b>                                                                | The name of the organization to which the agent belongs. This field is visible only if organization is enabled on Avaya Experience Portal.                                                                              |

## Deleting an agent

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Agents** menu, click **Agent Configuration**.
3. On the Agent Configuration page, select the check box next to the agent that you want to delete.
4. Click **Delete**.

## Importing agents

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Agents** menu, click **Agent Configuration**.
3. On the Agent Configuration page, click **Import Agents**.
4. On the Import Agents page, click one of the following options:
  - **Import agents from Communication Manager**
  - **Import agents from file**
  - **Import agents from AACC mode**
5. Click **Import Agents**.

### Related links

[Importing agents using Communication Manager](#) on page 525

[Importing Agents from a file](#) on page 525

[Importing agents using AACC](#) on page 526

## Importing agents using Communication Manager

### Procedure

1. On the Import Agents page, click **Import agents from Communication Manager**.
2. In the **Select Skill** section, select the skills of the agent.

You can view only the skills that have been added using **CC Elite Configurations**.

3. Click **Import Agents**.

### Related links

[Importing agents](#) on page 524

## Importing Agents from a file

### Procedure

1. On the Import Agents page, click **Import agents from file**.
2. In the Input File area, do one of the following:
  - Click **Upload CSV File to import agents** to import agents from a CSV file.
  - Click **Local File to import agents** to import agents from a file stored in your local machine.
3. **(Optional)** For **Upload CSV File to import agents**, browse and select the CSV file.

Ensure the following:

- The CSV file contains the following headers:
  - **AgentId**
  - **AgentName**
  - **Organizations**
  - **Groups**

**AgentId** and **AgentName** are mandatory headers.

- The values in the **Organizations** and **Groups** headers are separated by an exclamation mark (!).
- The maximum size of the CSV file is 5 MB.
- The following is an example of the CSV file:

```
AgentID,AgentName,Organizations,Groups
1234,Agent1,Default!CC,HR!Admin
5678,Agent2,CC,Admin
```

4. **(Optional)** For **Local File to import agents**, enter the location of the file in the **Local Path** field
5. Click **Import Agents**.

### Related links

[Importing agents](#) on page 524

## Importing agents using AACC

### Procedure

1. On the Import Agents page, click **Import agents from AACC**.
2. In the **Select Skill** section, select the skills of the agent.
3. Click **Import Agents**.

### Related links

[Importing agents](#) on page 524

## Import Agents tab field descriptions

Use this page to import agents. You can import agents using the following two options:

- Communication Manager
- CSV file
- AACC, if POM is installed in AACC mode

| Name                                            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|-------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Import Options</b>                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Import agents from Communication Manager</b> | To import agents from Communication Manager. When you click this option, POM displays the <b>Select Skill</b> section.                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Select Skill</b>                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Available Skills</b>                         | <p>This area displays the names of available skills.</p> <p>To select one or more skills from the available skills, do one of the following:</p> <ul style="list-style-type: none"> <li>• To move an agent from <b>Available Skills</b> to <b>Selected Skills</b>, click  corresponding to that agent.</li> <li>• To move all agents from <b>Available Skills</b> to <b>Selected Skills</b>, click <b>Add All</b>.</li> </ul>              |
| <b>Selected Skills</b>                          | <p>This area displays the names of selected skills.</p> <p>To remove one or more skills from the selected skills, do one of the following:</p> <ul style="list-style-type: none"> <li>• To remove a selected skill from <b>Selected Skills</b> to <b>Available Skills</b>, click  corresponding to that agent.</li> <li>• To remove all agents from <b>Selected Skills</b> to <b>Available Skills</b>, click <b>Remove All</b>.</li> </ul> |
| <b>Import agents from file</b>                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

*Table continues...*

| Name                                    | Description                                                                                                                                                                                                                   |
|-----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Upload CSV File to import agents</b> | To upload the CSV file to import agents.<br>The CSV file must be a comma separated file with the following format:<br><code>AgentId,AgentName,Organizations,Groups</code><br>The mandatory headers are AgentId and AgentName. |
| <b>Local File to import agents</b>      | To import a CSV file stored on a server. When you click this option, POM displays the <b>Local Path</b> field to enter the path of the CSV file that you want to import.                                                      |
| <b>Browse File</b>                      | To select the file to upload. POM displays this button when you click the <b>Upload CSV File to import agents</b> option.                                                                                                     |
| <b>Local Path</b>                       | To enter the path of the local file. POM displays this field when you click the <b>Local File to import agents</b> option.                                                                                                    |
| <b>Last Import Details</b>              | To view the details of last import.                                                                                                                                                                                           |
| <b>Import Agents</b>                    | To import the agents.                                                                                                                                                                                                         |
| <b>Cancel</b>                           | To cancel the procedure and return to the agent configuration page.                                                                                                                                                           |

## Assigning agents to an organization

### About this task

Use this procedure to do the following:

- Assign agent(s) to an organization.
- Remove agent(s) assigned to an organization.

### Before you begin

Ensure that organization is enabled on Avaya Experience Portal.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Agents** menu, click **Agent Configuration**.
3. On the Agent Configuration page, click **Assign Organization**.
4. On the Agent to Organization Assignment page, do the following:
  - a. In the **Organization** drop-down box, click the organization to which you want to assign agent(s).
  - b. To assign agent(s) from the **Available Agents** section, do one of the following:
    - To move an agent from **Available Agents** to **Selected Agents**, click **+** corresponding to that agent.
    - To move all agents from **Available Agents** to **Selected Agents**, click **Add All**.



- c. To remove agent(s) assigned to an organization, in the **Selected Agents** section, do one of the following:
- To remove a selected agent from **Selected Agents** to **Available Agents**, click  corresponding to that agent.
  - To remove all agents from **Selected Agents** to **Available Agents**, click **Remove All**.
5. Click **Save**.

## Agent to Organization Assignment field descriptions

Use this page to assign agents to an organization.

| Field or Button         | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Organization</b>     | The list of organizations configured on Avaya Experience Portal. This field is visible only if organization is enabled on Avaya Experience Portal.                                                                                                                                                                                                                                                                                                                                                      |
| <b>Available Agents</b> | <p>List of available agents.</p> <p>To select one or more agents from the available agents, do one of the following:</p> <ul style="list-style-type: none"> <li>• To move an agent from <b>Available Agents</b> to <b>Selected Agents</b>, click  corresponding to that agent.</li> <li>• To move all agents from <b>Available Agents</b> to <b>Selected Agents</b>, click <b>Add All</b>.</li> </ul>                 |
| <b>Selected Agents</b>  | <p>List of selected agents.</p> <p>To remove one or more agents from the selected agents, do one of the following:</p> <ul style="list-style-type: none"> <li>• To remove a selected agent from <b>Selected Agents</b> to <b>Available Agents</b>, click  corresponding to that agent.</li> <li>• To remove all agents from <b>Selected Agents</b> to <b>Available Agents</b>, click <b>Remove All</b>.</li> </ul> |
| <b>Cancel</b>           | To cancel the procedure and return to the agent configuration page.                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Save</b>             | To save the changes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

# Agent Group Configuration

## Adding an agent group

### About this task

Use this page to create an agent group for an organization.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Agents** menu, click **Agent Group Configuration**.
3. On the Agent Group Configuration page, click **New Agent Group**.
4. On the New Agent Group page, specify values for the following fields:

- **Name**
- **Description**
- **Organization**

The **Organization** field is visible only if organization is enabled on Avaya Experience Portal.

5. Click **Save**.

## New Agent Group page field descriptions

Table 5: Details tab

| Field or Button        | Description                                                                                                                                     |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b>            | Name of the agent group.                                                                                                                        |
| <b>Description</b>     | Description of the agent group.                                                                                                                 |
| <b>Organization</b>    | Name of the organization(s) to which the agent group belongs. This field is visible only if organization is enabled on Avaya Experience Portal. |
| <b>New Agent Group</b> | To add a new agent group.                                                                                                                       |
| <b>Save</b>            | To save the agent group.                                                                                                                        |
| <b>Cancel</b>          | To cancel the procedure and return to the Agent Group Configuration page.                                                                       |

## Agent Group Configuration page field descriptions

This page displays the agent groups. Use this page to do the following depending on your role:

- Add agent groups.
- Edit agent groups.

- Delete agent groups.
- Assign agents to agent groups.

| Field or Button                                                                                    | Description                                                                                                                                                                                                                                                                      |
|----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>New Agent Group</b>                                                                             | Click to add a new agent group.                                                                                                                                                                                                                                                  |
| <b>Delete</b>                                                                                      | To delete an agent group.                                                                                                                                                                                                                                                        |
| <b>Search Agent Groups</b>                                                                         | Use this field to search agent groups.                                                                                                                                                                                                                                           |
| <b>Filter</b>     | Click to perform an advanced search.<br>The following fields are displayed when you click <b>Filter</b> : <ul style="list-style-type: none"> <li>• <b>Column Name</b></li> <li>• <b>Operator</b></li> <li>• <b>Search Text</b></li> </ul>                                        |
| <b>Column Name</b>                                                                                 | Select the column name based on which you want to perform the advanced search.<br>The following are the options: <ul style="list-style-type: none"> <li>• Name</li> <li>• Organization</li> </ul>                                                                                |
| <b>Operator</b>                                                                                    | Click the operator you want to use to perform the advanced search.<br>The following are the options: <ul style="list-style-type: none"> <li>• Equal to (=)</li> <li>• Not Equal to (!=)</li> <li>• in</li> <li>• contains</li> <li>• begins with</li> <li>• ends with</li> </ul> |
| <b>Search Text</b>                                                                                 | Type the text you want to search.                                                                                                                                                                                                                                                |
| <b>Refresh</b>  | Click to clear the search.                                                                                                                                                                                                                                                       |

| Field or Button                                                                           | Description                                                                                                                                                                                                                                                                                                                                                                                                              |
|-------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Actions  | <p>The following are the options:</p> <ul style="list-style-type: none"> <li>• <b>Edit:</b> To edit the agent group.</li> <li>• <b>Agent Assignment:</b> To assign agents to a group.<br/>For more information, see <a href="#">Assigning agents to a group</a> on page 531.</li> <li>• <b>Delete:</b> To delete an agent.<br/>For more information, see <a href="#">Deleting an agent group</a> on page 531.</li> </ul> |
| <b>Name</b>                                                                               | The name of the agent group.                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Organization</b>                                                                       | The name of the organization to which the agent group belongs. This field is visible only if the organization is enabled on Avaya Experience Portal.                                                                                                                                                                                                                                                                     |
| <b>Description</b>                                                                        | The description of the agent group.                                                                                                                                                                                                                                                                                                                                                                                      |

## Deleting an agent group

### Before you begin

Ensure you configure at least one agent group before you delete an agent group.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Agents** menu, click **Agent Group Configuration**.
3. On the Agent Group Configuration page, select the check box next to the agent group that you want to delete.
4. Click **Delete**.

## Assigning agents to a group

### About this task

Use this procedure to do the following:

- Assign agent(s) to a group.
- Remove agent(s) assigned to a group.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Agents** menu, click **Agent Group Configuration**.
3. On the Agent Group Configuration page, click the  icon of the group to which you want to add agents and then click **Agent Assignment**.

4. On the Agent to Group Assignment page, do the following:
  - a. To assign one or more agents from **Available Agents**, do one of the following:
    - To move an agent from **Available Agents** to **Selected Agents**, click **+** corresponding to that agent.
    - To move all agents from **Available Agents** to **Selected Agents**, click **Add All**.
  - b. To remove one or more agents from **Selected Agents**, do one of the following:
    - To move an agent from **Selected Agents** to **Available Agents**, click **—** corresponding to that agent.
    - To move all agents from **Selected Agents** to **Available Agents**, click **Remove All**.
5. Click **Save**.

## Agent to Group Assignment page field descriptions

Use this page to assign agents to an agent group.

| Field or Button         | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Available Agents</b> | <p>The area displays the names of available agents.</p> <p>To select one or more agents from the available agents, do one of the following:</p> <ul style="list-style-type: none"> <li>• To move an agent from <b>Available Agents</b> to <b>Selected Agents</b>, click <b>+</b> corresponding to that agent.</li> <li>• To move all agents from <b>Available Agents</b> to <b>Selected Agents</b>, click <b>Add All</b>.</li> </ul>                                           |
| <b>Selected Agents</b>  | <p>The area displays the selected agents that are associated to an agent group.</p> <p>To remove one or more agents from the selected agents, do one of the following:</p> <ul style="list-style-type: none"> <li>• To remove a selected agent from <b>Selected Agents</b> to <b>Available Agents</b>, click <b>—</b> corresponding to that agent.</li> <li>• To remove all agents from <b>Selected Agents</b> to <b>Available Agents</b>, click <b>Remove All</b>.</li> </ul> |
| <b>Cancel</b>           | To cancel the changes.                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Save</b>             | To save the changes.                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

# Chapter 8: Managing supervisors

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## Supervisor overview

POM Supervisor is a new role that POM introduced in Avaya Experience Portal. By default, a user with a supervisor role can access Supervisor Dashboard. A supervisor can see and manage only the agents assigned to them. The supervisors can see and manage the campaigns of their organization.

A user with an Administrator role can see all the agents. A user with an Org Administrator role can see all the agents belonging to its organization.

POM provides a global configuration parameter which is the **Agent and supervisor configuration** for applying the agent and supervisor configurations. If this parameter is disabled, the supervisor can see all the agents and campaigns. For more information about the Supervisor feature, see *Avaya Proactive Outreach Manager Overview and Specification*.

---

## Assigning agent groups to a Supervisor

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Supervisor** menu, click **Supervisor Configuration**.
3. In the **User Selection** section, do the following:
  - a. Click the appropriate **Organization**.
  - b. Click the appropriate **User**.
4. To assign agent groups, move one or more agents from **Available Agent Groups** to **Selected Agent Groups**.
5. Click **Save**.

---

## Supervisor Configuration page field descriptions

Use this page to assign agent groups to a supervisor user.

| Name                          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Organization</b>           | The name of the organization. This field is visible only if organization is enabled on Avaya Experience Portal.                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>User</b>                   | <p>The list of the names of supervisors or the list of users who are assigned the roles with permission to view or operate agents at run-time, for example, View Active Agents, Release From Outbound, Move To Job, Place On Break, and Force Logoff .</p> <p> <b>Note:</b></p> <p>The users with "Administrator" and "Org Administrator" role are not displayed in the <b>User</b> drop-down.</p>                                                                                               |
| <b>Available Agent Groups</b> | <p>The list of agent groups available for the selected user.</p> <p>To select one or more agent groups from the list of available agent groups to assign to a selected user, do one of the following:</p> <ul style="list-style-type: none"> <li>• To move an agent group from <b>Available Agent Groups</b> to <b>Selected Agent Groups</b>, click .</li> <li>• To move all agent groups from <b>Available Agent Groups</b> to <b>Selected Agent Groups</b>, click <b>Add All</b>.</li> </ul> |
| <b>Selected Agent Groups</b>  | <p>The list of agent groups assigned to the selected user.</p> <p>To remove one or more agent groups from the list of selected agent groups, do one of the following:</p> <ul style="list-style-type: none"> <li>• To move an agent group from <b>Selected Agent Groups</b> to <b>Available Agent Groups</b>, click .</li> <li>• To move all agent groups from <b>Selected Agent Groups</b> to <b>Available Agent Groups</b>, click <b>Remove All</b>.</li> </ul>                            |
| <b>Cancel</b>                 | Click to cancel the changes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Save</b>                   | Click to save the changes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

# Chapter 9: Managing configurations

## Data Center Configuration

### Overview

The Experience Portal web console displays the Data Center Configuration page through which you can configure the POM data center.

Based on your role, you can do the following to configure a data center:

- Add
- Edit
- Delete



**Note:**

The Data Center Configuration page is available only if Geo Redundancy is enabled with MSSQL database.

### Data Center Configuration page field descriptions

To view the Data Center Configuration page through Avaya Experience Portal web portal, you must click **Proactive Outreach > Manager > Configurations > Data Center Configuration**.

| Field or Button | Description                                                                                                                                                  |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Group Name      | Displays the name of the data center.                                                                                                                        |
| Mode            | Displays the mode of the data center.<br>The available options are: <ul style="list-style-type: none"><li>• <b>Active</b></li><li>• <b>Standby</b></li></ul> |
| EPM Servers     | Displays the list of EPM servers in a data center.                                                                                                           |
| Add             | To add a data center.                                                                                                                                        |
| Delete          | To delete a data center.                                                                                                                                     |



## Adding a data center group

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Data Center Configuration**.
3. On the Data Center Configuration page, click **Add**.
4. On the Add data center group page, enter appropriate values in the fields.
5. Click **Save**.

## Add data center group page field descriptions

Use this page to associate EPM servers with a data center group.

| Name                  | Description                                                                                                                                                                                                                                                                                                                                        |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Group Name</b>     | A logical name for a data center.                                                                                                                                                                                                                                                                                                                  |
| <b>Mode</b>           | The mode of the data center. POM supports the following modes: <ul style="list-style-type: none"> <li>• <b>Active</b>: Indicates that the POM servers in the data center manage the outbound campaigns.</li> <li>• <b>Standby</b>: Indicates that the POM servers are in the hot standby mode and do not manage the outbound campaigns.</li> </ul> |
| Configure EPM Servers |                                                                                                                                                                                                                                                                                                                                                    |
| <b>EPM Servers</b>    | The list of EPM servers configured on Avaya Experience Portal.                                                                                                                                                                                                                                                                                     |
| <b>EPM Ip Address</b> | The IP address of the EPM servers configured on Avaya Experience Portal.                                                                                                                                                                                                                                                                           |
| <b>EPM User Name</b>  | The user name of EPM.                                                                                                                                                                                                                                                                                                                              |
| <b>EPM Password</b>   | The password for the EPM user.                                                                                                                                                                                                                                                                                                                     |

## Edit data center group page field descriptions

Use this page to associate an EPM server with a data center group.

| Name              | Description                       |
|-------------------|-----------------------------------|
| <b>Group Name</b> | A logical name for a data center. |

*Table continues...*

| Name                  | Description                                                                                                                                                                                                                                                                                                                                        |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Mode</b>           | The mode of the data center. POM supports the following modes: <ul style="list-style-type: none"> <li>• <b>Active</b>: Indicates that the POM servers in the data center manage the outbound campaigns.</li> <li>• <b>Standby</b>: Indicates that the POM servers are in the hot standby mode and do not manage the outbound campaigns.</li> </ul> |
| Configure EPM Servers |                                                                                                                                                                                                                                                                                                                                                    |
| <b>EPM Servers</b>    | The list of EPM servers configured on Avaya Experience Portal.                                                                                                                                                                                                                                                                                     |
| <b>EPM Ip Address</b> | The IP address of the EPM servers configured on Avaya Experience Portal.                                                                                                                                                                                                                                                                           |
| <b>EPM User Name</b>  | The user name of EPM.                                                                                                                                                                                                                                                                                                                              |
| <b>EPM Password</b>   | The password for the EPM user.                                                                                                                                                                                                                                                                                                                     |

## Deleting a data center group

### Before you begin Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Data Center Configuration**.
3. On the Data Center Configuration page, select the check box next to the data center group that you want to delete.
4. Click **Delete**.

---

## POM Servers

### Overview

A POM server consists of core POM components that are required to execute call, email, SMS, and agent-based campaigns. You must install the POM server on the primary EPM server. In a multiple server configuration, you can also install the POM server on auxiliary EPM servers.

The following are the POM components:

#### Campaign Director

Campaign Director is a Linux service that triggers campaigns and data imports at scheduled date and time. Campaign Director is also responsible for pausing and resuming campaigns based on user action and terminating campaigns if their finish criteria is specified. If you install POM as a multiple server configuration, then only one campaign director is in the active state and others

are in dormant state. For a multiple server configuration, the campaign director is responsible for assigning the contacts to be processed for any campaign across POM servers. Campaign Director is also responsible for redistribution of load in case of failures.

### **Campaign Manager**

Campaign Manager is a Linux service that parses a campaign strategy, makes voice calls, and sends SMS or email messages. Campaign Manager interfaces with one or more EPM servers for making outbound calls.

If you configure multiple EPM servers, the Campaign Manager uses all the servers in a synchronized manner, using all media resources available for load balancing and failover.

If you install POM as a multiple server configuration, the Campaign Manager service runs on all POM servers. When you run a campaign, each Campaign Manager processes the contacts allocated to the campaign by the Campaign Director.

### **Rule Engine Service**

Rule Engine is a Linux service that evaluates system rules and campaign rules for each campaign. You can create rules using Rule Editor.

Rules can be based on:

- Contact/address
- Number of attempts
- Channel
- Attempt completion code
- Nuisance frequency

Before attempting a contact, Campaign Manager refers the rule engine to check whether the rule engine has restricted the attempt by any system or user configured rule.

If you install POM as a multiple server configuration, then only one rule engine is in the active/master state, and others are in the dormant state.

### **POM Web services**

The system installs web services as a part of POM server and accesses the web services from the external applications. POM Pluggable Data Connector (PDC) uses web services to interface with POM. You can use the Web services to access various contact attributes to play personalized prompts or make certain decisions in the application flow.

### **Agent Manager**

POM Agent Manager (PAM) is a Linux service that manages agent operations. You can either have agent-based campaigns or agent-less (notification) skill-based campaigns.

By default, the Agent Manager allocates 1536 MB memory, which can be utilized for up to 500 agents. If you want to run more than 500 agents, say up to 1000 agents, then you must increase this memory to 3GB. To change Agent Manager memory allocation, you must run `updateAgentManagerMemory.sh` script from `$POM_HOME/bin` folder.

PAM is responsible for distributing licenses to all voice-based campaigns. The high-level functions of PAM include:

- Manages agent allocation and state for campaigns.

- Manage agents in a blended job. Only CC Elite configuration supports this module.
- Update the POM database with current agent related information for reporting and HA related functionality.
- Distribute the preview and predictive agent licenses among running agent-based campaigns and distributing outbound ports to voice notification campaigns.
- Support High Availability in case of system failures.
- Support real-time commands from Supervisor Dashboard such as minimum agents, priority, or agent-based commands such as Forced Logoff.

## ActiveMQ

ActiveMQ is a Linux service that is used for Inter process communication between POM components. You can change the runtime parameters of campaign jobs and publish the contact attempt information using ActiveMQ.

## Kafka server

POM Kafka Service is a distributed messaging platform which allows users to subscribe to it and publish data to any number of systems or real-time applications. It provides a unified, high-throughput, low-latency platform for handling real-time data feed.

## Advance List Management

The advance campaign list management capability is available in Proactive Outreach Manager. It includes the following features:

- File splitters
- Filter template
- List priority

## POM Supervisor Dashboard service

The POM Supervisor Dashboard service is a Linux service used for real-time monitoring of active campaigns, staffed agents, licenses, inbound skills for Avaya Experience Platform™ On-Prem , and active data and DNC import jobs that are configured in POM.

Supervisors can use the POM Supervisor Dashboard to do the following:

- Monitor active campaigns and perform campaign-related operations. For example, pause or resume an active campaign.
- Perform remedial actions based on the status of the active campaigns.
- Change the campaign parameters at run time. For example, change the priority of a campaign job at run time.
- Set the dialing order for the priority, retry, and regular contacts in a campaign at run time.
- Perform run-time changes in filter templates and contact lists that are associated with a campaign.
- Monitor staffed agents and perform agent-related operations. For example, move an agent to another job.
- Monitor active data import and DNC import jobs.
- Pause, resume, and stop active data import and DNC import jobs.

- Perform global configurations for the Supervisor Dashboard, such as, change the time format.
- View the license allocation summary for running campaigns.
- View and monitor the inbound skills for which blend monitoring is enabled for Avaya Experience Platform™ On-Prem and the inbound skills that POM uses for skill-based pacing for Avaya Experience Platform™ On-Prem .
- Create and manage custom views and dashboards.
- Change the state of a zone and assign failover zone.

## **Agent SDK Service**

Agent SDK Service is a service in POM which has two components, atmosphere manage service and Java Agent SDK. Atmosphere manage service listens on https port for the web socket request from Elite Workspaces and Java Agent SDK will open TCP socket port with active agent manager.

## **Nailer CCXML application**

To speed-up the process of connecting to customer call with agents, POM keeps the agent on a continuous call. This continuous call is known as nailing. This application takes care of the agent call control flow. An available agent is nailed at the beginning of the call session when the agent gets attached to a job.

POM helps to enhance the agent performance by delaying the un-nailing of an agent. When the system detaches the agent from a job, the system does not terminate the agent nailing. The next job also uses the same nailing session. In some cases, as a result of agent optimization, the system can nail the agent by a different application assigned to the job.

POM does not support multiline appearance on agent phones and does not check the agent phone status for off-hook/on-hook before launching the nail-up call.

POM does not support hold on nailed calls. It does not check the agent phone status for hold/un-hold during the nail-up. The agent must ensure that the nailed call is not put on hold to avoid nuisance, silent, or abandoned calls to customers.

## **Driver CCXML application**

This application takes care of the customer call control flow.

## **Agent Scripts**

When an agent gets a call, an agent script is shown to the agent on his desktop, which contains the script that the agent speaks to the customer.

The agent script is displayed on agent desktop to help the agent with the customer call. The agent script can be either Native or URL based. You can create, delete, or modify the Native scripts using a built-in editor. To use agent scripts, you must associate the agent script with a campaign strategy for agent-based campaigns.

## **Load Monitor**

Load monitoring service determines the load of the POM system.

The following three components are used for determining the load of the POM system:

- Database: Load on the database is calculated using parameters such as active sessions, connections, long queries, and blocked sessions.

- **POM:** Load on POM is calculated based on active jobs, active agents, and active imports.
- **Server:** Load on the server is calculated based on CPU usage and memory usage.

If the current load of the POM system reaches a certain threshold, alarm is generated and restrictions are imposed on imports, reports, and purges.

- For more information about alarms, see *Troubleshooting Avaya Proactive Outreach Manager*.
- For more information on how restrictions are applied to purge, see the *Purge schedules and database reindexing* section in *Avaya Proactive Outreach Manager Overview and Specification*.
- For more information on how restrictions are applied to imports, see the *Restrictions on imports when POM is under heavy load* section in *Avaya Proactive Outreach Manager Overview and Specification*.
- For more information on how restrictions are applied to reports, see the *POM Reports* section in *Avaya Proactive Outreach Manager Overview and Specification*.

## Adding a POM server

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Servers**.
3. On the Servers page, click **Add**.
4. Specify the name of the POM server and the IP address of the server.
5. Click **Continue**.

The system displays the details of the POM certificates.

6. To authenticate the certificate, select **Check the Trust this certificate check box**.

This establishes communication between the POM server and EPM.

You can use the POM certificates for identifying the POM servers that are connected to a specific Avaya Experience Portal system.

The POM certificates are on each server.

When you add a POM server, the primary EPM retrieves the certificates, and then stores them in a certificate store on EPM.

7. (Optional) Click the **Categories and Trace level** link.

Use the option button to select the POM settings or the customized settings for the trace levels.

8. Click **Save**.
9. Restart the POM server for the changes to take effect.

 **Note:**

Avaya Experience Portal 8.1.2 supports the certificates only with a minimum key size of 2048 bit.

## Add POM server page field descriptions

Use this page to add POM servers.

| Field or Button              | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>POM Server Name</b>       | A unique identifier for the POM server.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>POM Server IP Address</b> | <p>The IP address for the POM server.</p> <p> <b>Note:</b></p> <p>You have to enter the IP address in the specified format xxx.xxx.xxx.xxx. Ensure that this is the IP address of the POM server configured during installation. You can add only one primary POM server and more than one auxiliary POM servers. Ensure you install the primary POM server on the primary EPM. The multiple auxiliary POM servers are associated with the primary POM server.</p> |
| <b>Continue</b>              | After clicking <b>Continue</b> , Edit POM Server page is displayed where the license information is given. You must select the <b>Trust this certificate</b> selection box and then use <b>Save</b> to save the newly added POM server.                                                                                                                                                                                                                                                                                                             |

## POM Servers page field descriptions

To view the Servers page through Avaya Experience Portal web portal, you must click **Proactive Outreach > Manager > Configurations > Servers** in the navigation pane. This page displays the existing POM servers. You can also use this page to add, change, or delete a POM server.

| Field or Button        | Description                                                                                                                                                                                                                              |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Selection check box    | Use this selection check box to select the POM servers to delete.                                                                                                                                                                        |
| <b>POM Server Name</b> | A unique identifier for the POM server.                                                                                                                                                                                                  |
| <b>Host Address</b>    | <p>The IP address or the hostname of the POM server.</p> <p> <b>Note:</b></p> <p>Enter the IP address in the specified format of xxx.xxx.xxx.xxx.</p> |

*Table continues...*

| Field or Button          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Trace Levels</b>      | <p>The default POM trace levels can be used for monitoring.</p> <p>The options are:</p> <ul style="list-style-type: none"> <li>• Use POM Settings: The POM server uses the default trace settings specified on the POM Settings page. Using these settings, you can specify the trace levels for all POM servers.</li> <li>• Custom: The POM server uses the trace settings for the specific POM server. To view these settings, select a POM server from <b>POM Server Name</b>.</li> </ul>                                                                                                                                                                                                                                                              |
| <b>Certificates</b>      | Provides a link to export the certificate.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Add</b>               | Opens the Add POM server page.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Delete</b>            | <p>Deletes the selected POM server. You can select POM servers using the check box next to the POM server name.</p> <p> <b>Note:</b></p> <p>You cannot delete a POM server until you stop all POM services. If you have associated any campaign with the POM server on the Campaign Creation page, and you try to delete the POM server, the system displays a warning "Cannot delete the Voice servers associated with Campaigns!".</p> <p>You must first remove the association of POM server from Campaign Creation page, and then delete the POM server. In case of single server deployment, you must delete the campaign first before deleting the POM server.</p> |
| <b>POM Settings</b>      | Opens the POM Global Settings page through which you can change the global settings for all POM servers.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Outbound Settings</b> | Displays the list of voice servers. Based on your user role, you can enter the voice server password for outbound calls.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>POM Manager</b>       | Provides options to start or stop the POM servers connected to EPM.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

## Editing POM server

### Before you begin Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Servers**.
3. On the Servers page, select the POM server you want to edit by clicking on the name of the server.

 **Note:**

You cannot edit the name of the POM server.

For changing the IP address of Avaya Experience Portal, see *Administering Avaya Experience Portal*.



4. To update the POM server IP address or hostname, you must reissue the POM certificate based on the new IP address and hostname, and then trust the new certificate in EPM.
  - a. Open a ssh session on the host EPM server with root privileges.

 **Important:**

If you have the database server installed on a local server, run the `$POM_HOME/bin/installDB.sh` first and do not recreate the POM schema. In production environment, do not install POM database schema on local PostgreSQL.

- b. Stop the vpms service by typing `service vpms stop` and stop the POM service using `pom stop`.
- c. Run `$POM_HOME/bin/do_UpdatePOMCerts`.
- d. Update the POM's copy of EPM certificate by selecting **Yes**.
- e. Reissue POM certificate carrying new IP and the hostname (if changed). by selecting **Yes**.

If you are changing the IP address or hostname of the primary POM server, run `$POM_HOME/bin/installDB.sh` to reconfigure the database connection.

When you run the `$POM_HOME/bin/installDB.sh` again ensure you,

- Select the same Contact Center mode that you used earlier.

For example, if you installed POM in the None mode, ensure that you select the None mode after you rerun the `$POM_HOME/bin/installDB.sh`.

- Do not recreate the database schema.
- If you change the IP address of the database server, change the IP address

- f. In the navigation pane, click **Proactive Outreach > Manager > Configurations > Servers**.
- g. Click the POM server that you want the edit.
- h. Change the POM server IP address.

You cannot change the hostname through the user interface.
- i. Click **Apply** to fetch the new certificate.
- j. Trust the new updated certificate.
- k. Click **Save**.
- l. Start the POM service through the user interface or by typing `POM restart`.

5. **(Optional)** Click the **Categories and Trace Levels** link to specify the trace level settings.
6. Click **Save** to save the changes.

The POM server page is displayed confirming the changes are saved.

7. Restart the server for the changes to take effect.
8. Add all POM applications again.

## Edit POM Server page field descriptions

Use this page to edit the POM server configuration.

| Field or Button        | Description                                                                                                                                                                                                                                                                                                                                                                                                            |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>POM Server Name</b> | <p>A unique identifier for POM server.</p> <p> <b>Note:</b></p> <p>You cannot change the name of the POM server once specified.</p>                                                                                                                                                                                                   |
| <b>Host Address</b>    | <p>The host or IP address of the POM server.</p> <p> <b>Note:</b></p> <p>You cannot change the host or IP address of the POM server once specified.</p>                                                                                                                                                                               |
| <b>POM Certificate</b> | <p>This certificate is to validate the POM server. <b>POM Certificate</b> is used to connect and access functionality of the EPM.</p> <p> <b>Note:</b></p> <p>A similar certificate is displayed while installing POM. The displayed certificate must be identical to the certificate established during the installation of POM.</p> |

*Table continues...*

| Field or Button                    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Categories and Trace Levels</b> | <p>You can use these to monitor POM. You can select to use the default POM settings or have custom settings defined. You can have the levels as:</p> <ul style="list-style-type: none"> <li>• Off</li> <li>• Fine</li> <li>• Finer</li> <li>• Finest</li> </ul> <p>You can monitor the trace levels for:</p> <ul style="list-style-type: none"> <li>• Campaign Director</li> <li>• Campaign Manager</li> <li>• Agent Manager</li> <li>• ActiveMQ Manager</li> <li>• Web Tracer</li> <li>• Web Service Tracer</li> <li>• Rule Engine Service</li> <li>• Rest Service</li> <li>• Pom Agent Sdk Service</li> <li>• Adv List Mgmt Service</li> <li>• Agent Sdk API Service</li> <li>• Dashboard Service</li> <li>• Load Monitor Service</li> </ul> <p> <b>Note:</b><br/>Restart the POM server for all changes to take effect.</p> |
| <b>Save</b>                        | The button to save the changes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

## Deleting a POM server

### Before you begin

Ensure that you configured at least one POM server and that server is in the `STOPPED` state.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Servers**.
3. On the Servers page, select the check box for the server that you want to delete.
4. Click **Delete**.

 **Note:**

If you attempt to delete a POM server that has any campaigns associated with it, POM displays the `Cannot delete the Voice servers associated with Campaigns!` warning.

Therefore, you must first remove the association of the POM server from the Campaign Creation page, and then delete the server.

For a single server deployment, you must delete the campaign before deleting the server.

## POM Global Settings page field descriptions

To view the POM Global Settings page through Avaya Experience Portal web portal, you must click **Proactive Outreach > Manager > Configurations > Servers > POM Settings**.

On the POM Global Settings page, you can configure the settings that are applicable at the global level for all POM servers. You can override or change the settings for an individual POM server through the Edit POM Server page using the **Custom** option in **Categories and Trace Levels**.

| Field or Button                   | Description                                                                                                                                                                                                                                                                                                                                                                                 |
|-----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Trace Logger</b>               |                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Log File Maximum Size (MB)</b> | Used to specify the maximum size in megabytes of the trace file. Once the log file reaches this size, the system creates a new log file. If creating a new log file causes the number of logs to exceed the <b>Number of Logs to Retain</b> setting, the system deletes the oldest file before it creates the new file. You can specify a value between 1 to 500. The default value is 250. |
| <b>Number of Logs To Retain</b>   | Use to specify the maximum number of backup files the POM server can retain, excluding the current log file. Once this number of log files exceeds, POM deletes the oldest log file before creating a new one. Specify a whole number between 1 to 20. The default value is 10.                                                                                                             |
| <b>Event Settings</b>             |                                                                                                                                                                                                                                                                                                                                                                                             |

*Table continues...*

| Field or Button                             | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|---------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Event Level Threshold to Send to EPM</b> | <p>Use the drop-down list to do the following actions:</p> <ul style="list-style-type: none"> <li>• See a log of the events and the alarms that every POM server sends.</li> <li>• Select the lowest level of the events and the alarms to include in the tracing log that the POM server sends to EPM.</li> <li>• Select a value for the event types.</li> </ul> <p>You can choose the event types based on this value.</p> <p>The types are as follows:</p> <ul style="list-style-type: none"> <li>• <b>Error:</b> The POM server sends the events of the Error and the Fatal levels to EPM.</li> <li>• <b>Warn:</b> The POM server sends the events of the Error, the Fatal, and the Warning levels to EPM.</li> <li>• <b>Info:</b> The POM server sends the alarms of the Error, the Fatal, the Warning, and the Information types to EPM.</li> </ul> <p>The POM server sends a generated event to EP if the threshold time exceeds the configured time of the throttling interval on the POM server.</p> <p>The POM server does not send a generated event to EP if the threshold time does not exceed the configured time of the throttling interval on the POM server.</p> <p>The duration of the throttling interval is in milliseconds.</p> <p>The POM server always sends the Fatal alarms to EPM.</p> |
| <b>Logging Options</b>                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Show Line Number</b>                     | Select this check box to enable POM to display line numbers in the log files that POM generates.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Zip Roll Over files</b>                  | Select this check box to enable POM to zip the generated log files that roll over.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

*Table continues...*

| Field or Button                    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Categories and Trace Levels</b> | <p>Use to troubleshoot POM by setting the trace levels for the following:</p> <ul style="list-style-type: none"> <li>• Campaign Director (CD)</li> <li>• CD-Import Category</li> <li>• CD-Zone Category</li> <li>• CD-Schedule Category</li> <li>• CD-Dashboard Category</li> <li>• CD-History Category</li> <li>• CD-Rest Category</li> <li>• Campaign Manager</li> <li>• Agent Manager</li> <li>• ActiveMQ Manager</li> <li>• Web Tracer</li> <li>• Web Service Tracer</li> <li>• Rule Engine Service</li> <li>• Rest Service</li> <li>• Pom Agent Sdk Service</li> <li>• Adv List Mgmt Service</li> <li>• Agent Sdk API Service</li> <li>• Dashboard Service</li> <li>• Load Monitor Service</li> </ul> <p>To troubleshoot a particular area, you must set specific categories to <b>Fine</b> and examine the resulting output to see if you can locate the issue. If not, set the level to <b>Finer</b> and repeat the process. If you still need more data, then set the level to <b>Finest</b> and keep a close watch on system resource usage. You can choose to monitor as follows:</p> <ul style="list-style-type: none"> <li>• <b>Off</b>: Sets trace logging for all categories to off.</li> <li>• <b>Info</b>: Sets the trace logging level of the campaign director and all its categories to Info.</li> <li>• <b>Fine</b>: Sets trace logging for all categories to fine.</li> <li>• <b>Finer</b>: Sets trace logging for all categories to finer.</li> <li>• <b>Finest</b>: Sets trace logging for all categories to finest.</li> </ul> <p> <b>Note:</b></p> <p>Click the group heading if the fields are not displayed.</p> |

*Table continues...*

| Field or Button | Description                                                                                                  |
|-----------------|--------------------------------------------------------------------------------------------------------------|
|                 | You can also configure these settings from the Edit POM Server page, if you select the <b>Custom</b> option. |
| <b>Save</b>     | Use to save the POM global settings.                                                                         |
| <b>Apply</b>    | Use to apply the current settings.                                                                           |

## Voice Server page field descriptions

To view the Voice Server page through Avaya Experience Portal web portal, you must click **Proactive Outreach > Manager > Configurations > Servers > Outbound Settings**.

The voice server is the primary POM or any auxiliary POM associated with the primary EPM. The voice server can only be the primary EPM or auxiliary EPM of the Avaya Experience Portal system to which the POM system belongs.

 **Note:**

You cannot add any servers from this page. This page only lists the primary EPM and the auxiliary EPMs associated with the primary POM server.

| Field or Button   | Description                                                                                                   |
|-------------------|---------------------------------------------------------------------------------------------------------------|
| <b>Name</b>       | Displays the names of the primary and auxiliary EPMs associated with the primary POM server.                  |
| <b>IP Address</b> | Displays the IP address or hostname of the primary and auxiliary EPMs associated with the primary POM server. |

## Editing a voice server

### About this task

Use this procedure to set the credentials of a voice server for outbound calling.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Servers**.
3. On the Servers page, click **Outbound Settings**.
4. On the Voice Servers page, click the name of the server whose credentials you want to edit.  
POM displays the Edit Voice Server page.
5. In the **User Name** field, type the login name of the POM users who have the privileges for using SOAP web services.
6. In the **Password** field, type a password.
7. Click **Save**.

## Edit Voice Server page field descriptions

Use this page to edit the user name and password for the primary or auxiliary EPM associated with the primary POM server to enable the outbound calls.

| Field or Button   | Description                                                                                                                                                                                                                                                                          |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b>       | Displays the name of the primary or auxiliary EPM associated with the primary POM server.<br><br>* <b>Note:</b><br>You cannot change the name once specified.                                                                                                                        |
| <b>IP Address</b> | Displays the IP address or hostname of the primary or auxiliary EPM associated with the primary POM server.<br><br>* <b>Note:</b><br>You cannot edit the IP address or hostname once specified.                                                                                      |
| <b>User Name</b>  | Use to specify a Avaya Experience Portal Web administrator user name to connect to the primary or auxiliary EPM associated with the primary POM server.<br><br>* <b>Note:</b><br>Ensure that the user has EP web services role and the outcall feature is enabled.                   |
| <b>Password</b>   | Use to specify a Avaya Experience Portal Web administrator password to connect to the primary or auxiliary EPM associated with the primary POM server.<br><br>* <b>Note:</b><br>Ensure that the password does not have any of the following special characters:<br>~, ` , ! , ; , \. |

## POM Manager page field descriptions

To view the POM Manager page through Avaya Experience Portal web portal, you must click **Proactive Outreach > Manager > Configurations > Servers > POM Manager**.

Use this page to manage the POM servers configured on the system.

| Name                           | Description                                                                                                                                                     |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Service Names</b>           | POM services configured on the system.                                                                                                                          |
| <b>&lt;POM Server Name&gt;</b> | Displays a unique identifier for the POM server.                                                                                                                |
| <b>Last Poll</b>               | Displays the date and time when the page is last refreshed.                                                                                                     |
| <b>Refresh</b>                 | To refresh the specified POM server display.                                                                                                                    |
| <b>Stop</b>                    | To stop the specified POM server. The <b>Stop</b> button is grayed out until you select the POM server, and when the server is in the Stopped state.            |
| <b>Start</b>                   | To start the specified POM server. The <b>Start</b> button is grayed out when the server is in the running state. Select the POM server to activate the button. |



## Service Names

This page also displays the POM services configured on the system. You can stop or start these services individually. Following are the configured POM services:

- ActiveMQ
- Advance List Management
- Agent SDK Service
- Agent Manager
- Campaign Director
- Campaign Manager
- Dashboard service
- Kafka Server
- Load Monitor
- Rule Server

The POM services functions in the following states. The ongoing status of these services are depicted in different colors.

| State           | Description                                                    | Color                                                                             |
|-----------------|----------------------------------------------------------------|-----------------------------------------------------------------------------------|
| <b>MASTER</b>   | The service is running on the host and is in the master mode.  | The ongoing status of the master state is displayed in green text.                |
| <b>DORMANT</b>  | The service is running on the host and is in the dormant mode. | The ongoing status of the dormant state is displayed with the default color text. |
| <b>RUNNING</b>  | The service is running on the host.                            | The ongoing status of the master state is displayed in green text.                |
| <b>STOPPED</b>  | The service is in stopped state on the host.                   | The ongoing status of the master state is displayed in red text.                  |
| <b>STOPPING</b> | The service is in stopping state on the host.                  | The ongoing status of the dormant state is displayed with the default color text. |

## Starting the POM server

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Servers**.
3. On the Servers page, click **POM Manager**.
4. On the POM Manager page, select the check box that indicates the server that you want to start.
5. Click **Start**.

You can also start the server from the command line by typing `POM start` and pressing Enter.

## Stopping the POM server

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Servers**.
3. On the POM Servers page, click **POM Manager**.
4. On the POM Manager page, select the check box that indicates the server that you want to stop.
5. Click **Stop**.

You can also stop the server from the command line by typing `POM stop` and pressing Enter.

## Monitoring POM system health

### About this task

Use this procedure to monitor the real-time health of POM system. You can monitor the resource utilization, such as CPU and memory utilization, per POM server and by every service within the POM server.

For example, you can monitor the CPU usage by a POM server and also monitor the CPU usage by every service that runs on the POM server.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Servers**.
3. On the Servers page, select the POM server and click **POM Health Monitor**.
4. Click the **All Services** tab to monitor the resource utilization by all services running on the POM server.
5. Click the **Top 5 Services** tab to monitor the resource utilization by the top five services running on the POM server.
6. Click the **System Info** tab to monitor the overall system performance.
7. Click the **POM System Limits** tab to monitor the items that exceed the default system/threshold limit.

## POM Health Monitor page field descriptions

To see the POM Health Monitor page, click **Proactive Outreach > Manager > Configurations > Servers > POM Health Monitor**. Or, click **Proactive Outreach > Manager > Configurations > POM Health Monitor**. POM Health Monitor displays limits for Contact Lists, Campaigns, and Callbacks at a organization level. The page displays the real-time data of the following POM services:

- ActiveMQ Manager

- ActiveMQ
- Campaign Director
- Campaign Manager
- Rule Server
- Agent Manager
- Dashboard Service
- Advance List Management
- Agent SDK Service
- Kafka Server
- Load Monitor

For each running service, the POM Services page displays the following data:

| Field                         | Description                                                                                                    |
|-------------------------------|----------------------------------------------------------------------------------------------------------------|
| <b>Service Name</b>           | The name of the POM service.                                                                                   |
| <b>Process ID</b>             | The number that identifies the service process.                                                                |
| <b>Uptime (min)</b>           | The time in minutes for which the process runs.                                                                |
| <b>CPU Usage (%)</b>          | The percentage of the CPU that the service uses.                                                               |
| <b>Memory usage (%)</b>       | The percentage of RAM that the service uses.                                                                   |
| <b>Memory used (GB)</b>       | The RAM in GB used by the service.                                                                             |
| <b>Swap Memory (MB)</b>       | The memory in MB that the service copies to the disk to make the same memory available for other applications. |
| <b>I/O Read Count (x 1K)</b>  | The number of read operations that the service performs.                                                       |
| <b>I/O Write Count (x 1K)</b> | The number of write operations that the service performs.                                                      |
| <b>I/O Read (MB)</b>          | The number of megabytes of data that the service reads.                                                        |
| <b>IO Write (MB)</b>          | The number of megabytes of data that the service writes.                                                       |
| <b>DB Connections</b>         | The number of connections that the service uses while fetching data from the POM database.                     |
| <b>File Descriptors</b>       | The number of file descriptors that the process opens.                                                         |
| <b>Network Connections</b>    | The number of connections established by POM service.                                                          |
| <b>OutFile Size (MB)</b>      | The size of the service.out file in megabytes.                                                                 |

For each running service, the Top 5 Services page displays the following data:

- The data related to the 5 memory usage processes that use the maximum memory.

- The data related to the 5 CPU usage processes of all services across the system that use the CPU to a maximum extent.
- The POM servers on which the services are running.
- The user of organization who uses the service.

For each running service, the System Info page displays the following data:

### System Information

| Field              | Description                                                                |
|--------------------|----------------------------------------------------------------------------|
| CPU Usage (%)      | The percentage of CPU used by POM system.                                  |
| Disk Usage (%)     | The percentage of the disk space used by the POM system.                   |
| Memory Usage (%)   | The percentage of RAM used by the POM system.                              |
| Load (last 1 min)  | The average number of running or waiting processes in the past 1 minute.   |
| Load (last 5 min)  | The average number of running or waiting processes in the past 5 minutes.  |
| Load (last 15 min) | The average number of running or waiting processes in the past 15 minutes. |

| Field                                                                                       | Description                                                                 |
|---------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|
| POM Server                                                                                  | Displays the list of POM servers.                                           |
| Timestamp                                                                                   | Displays the timestamp at which POM gathers the latest data of the service. |
| Refresh  | Displays the latest data of a POM server.                                   |

### Overall IOps

| Field             | Description                                              |
|-------------------|----------------------------------------------------------|
| Device            | The name of the device or partition.                     |
| TPS               | The number of transfers per second issued to the device. |
| Read/s (KB)       | The data read from the device in kilobytes per second.   |
| Writes/s (KB)     | The data written to the device in kilobytes per second.  |
| KB Read (x 1K)    | The total number of KB read by the device.               |
| KB written (x 1K) | The total number of KB written by the device.            |

### POM System Limits

This tab displays the limits for Contact Lists, Campaigns, and Callbacks at a organization level.

The **Total Number of Contact Lists** header displays the total count of contact lists along with the count of contact lists that exceeds the system limit.

You can click the **Total Number of Contact Lists** header to see the total contacts in each contact list and its comparison with the supported the system limit.

| Field                          | Description                                                                                                                                                                                                                                                                                                                                                                                |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Contact List Name</b>       | The name of the contact list.                                                                                                                                                                                                                                                                                                                                                              |
| <b>Total Contacts</b>          | The total number of contacts in the contact list.                                                                                                                                                                                                                                                                                                                                          |
| <b>System Limit Comparison</b> | <p>The difference between the number of contacts in the contact list and the supported system limit.</p> <p>If the number of contacts in the contact list exceeds the supported system limit, then POM displays the difference in a red glow.</p> <p>If the number of contacts in the contact list exceeds the threshold percentage, then POM displays the occupancy in a orange glow.</p> |

The **Total Number Of Campaigns** header displays total count of campaigns along with the count of campaigns that exceed the supported system limits. A campaign for which the total number of contacts across all the contact lists configured for the campaign (without applying filter template) exceeds the supported system limit of number of contacts in a campaign, is also considered as exceeding supported system limits.

You can click the **Total Number Of Campaigns** header to see the total contacts in each campaign and its comparison with the supported system limit.

| Field                          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Campaign Name</b>           | The name of the Campaign.                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Total Contacts</b>          | The total number of contacts across all the contact lists configured for the campaign (without applying filter template).                                                                                                                                                                                                                                                                                                                                                      |
| <b>System Limit Comparison</b> | <p>The difference between the total number of contacts across all the contact lists configured for the campaign (without applying filter template) and the supported system limit.</p> <p>If the total number of contacts in the campaign exceeds the supported system limit, then POM displays the difference in an red glow.</p> <p>If the total number of contacts in the campaign exceeds the threshold percentage, then POM displays the occupancy in an orange glow.</p> |

The **Total Number Of Callbacks** header displays total count of callbacks along with the count of campaigns that exceed the supported system limits.

You can click the **Total Number Of Callbacks** header to see the total callbacks in a campaign and its comparison with the supported system limit.

| Field                                  | Description                                                                                                                                                                                                                                                                                                                                                                                                          |
|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Total Callbacks In Organization</b> | The total number of callbacks in an organization.                                                                                                                                                                                                                                                                                                                                                                    |
| <b>System Limit</b>                    | The system limit for callbacks in an organization.                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Threshold Limit</b>                 | The threshold percentage for callbacks in an organization.                                                                                                                                                                                                                                                                                                                                                           |
| <b>System Limit Comparison</b>         | <p>The difference between the total number of waiting callbacks across an organization and the supported system limit.</p> <p>If the total number of callbacks in a campaign exceeds the supported system limit, then POM displays the difference in a red glow.</p> <p>If the total number of callbacks in an organization exceeds the threshold percentage, then POM displays the occupancy in an orange glow.</p> |

| Field                          | Description                                                                                                                                                                                                                                                                                                                                     |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Campaign Name</b>           | Displays the name of the campaign.                                                                                                                                                                                                                                                                                                              |
| <b>Waiting Callbacks</b>       | Displays the total number of callbacks that are in the <code>Waiting for Job</code> state for the campaign.                                                                                                                                                                                                                                     |
| <b>System Limit Comparison</b> | <p>The difference between the total waiting callbacks and the supported system limit.</p> <p>If the difference exceeds the supported system limit, then POM displays the difference in a red glow.</p> <p>If the number of records in the POM database exceeds the threshold percentage, then POM displays the difference in a orange glow.</p> |

| Field                | Description                                                                                                                                                                                                                                                  |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Item Name</b>     | <p>Displays the following:</p> <ul style="list-style-type: none"> <li>• Total Contacts in the System</li> <li>• Total Records in the Contacts Attempt History Table</li> <li>• Total Callbacks in the System</li> </ul>                                      |
| <b>Total Records</b> | <p>Displays the following:</p> <p>The total number of contacts in the POM database.</p> <p>The total number of records in the <code>contact_attempts_history</code> table in the POM database.</p> <p>The total number of callbacks in the POM database.</p> |
| <b>System Limit</b>  | Displays the value of the supported system limit.                                                                                                                                                                                                            |

*Table continues...*

| Field                          | Description                                                                                                                                                                                                                                                                                                                           |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>System Limit Comparison</b> | <p>The difference between the total records and the supported system limit.</p> <p>If the difference exceeds the supported system limit, then POM displays the difference in a red glow.</p> <p>If the number of records in the POM database exceeds the threshold percentage, then POM displays the difference in a orange glow.</p> |

## System Load

This tab displays information about the current load of the POM system. The system load is calculated based on the following three components:

- Load on database: Database load is calculated based on parameters such as active sessions, connections, long queries, and blocked sessions.
- Load on POM: POM load is calculated based on the parameters such as active jobs, active agents, and active imports.
- Load on server: The server load is calculated based on parameters such as CPU usage and memory usage.

The pie chart displays the percentage of load distribution across server, POM, and database.

When POM detects that the current system load exceeds the pre-defined threshold limit, POM applies restrictions on parallel imports, large imports, and reports, and the system restrictions window then opens and provides information about the restrictions.

POM applies restrictions for the smooth running of the POM system and avoiding breakdowns during production.

- For more information on restrictions on imports, see the *Restrictions on imports when POM is under heavy load* section in *Avaya Proactive Outreach Manager Overview and Specification*.
- For more information on restrictions on reports, see the *Reports* section in *Avaya Proactive Outreach Manager Overview and Specification*.

The system restrictions window is displayed only once during each user session, either when the user visits the POM Home page or the **System Load** tab on the POM Health Monitor page.

## Database details

| Field                   | Description                                                                    |
|-------------------------|--------------------------------------------------------------------------------|
| <b>Active Sessions</b>  | Count of active sessions.                                                      |
| <b>Connections</b>      | Number of connections opened in the database by the application.               |
| <b>Long Queries</b>     | Count of queries running for a long time. For example, more than five minutes. |
| <b>Blocked Sessions</b> | Count of blocked database sessions.                                            |

**\* Note:**

Load monitor performs health queries on the POM database. If the database server contains databases other than the POM database, the health queries include results from all the databases. This implies that the load calculation might be impacted by the existence and usage of the additional databases on the same database server.

**POM details**

| Field          | Description                                         |
|----------------|-----------------------------------------------------|
| Active Jobs    | Number of running campaigns in the system.          |
| Active Agents  | Number of logged-in, non-idle agents in the system. |
| Active Imports | Number of ongoing imports in the system.            |

**Server details**

| Field          | Description                                        |
|----------------|----------------------------------------------------|
| CPU Usage %    | The average percentage of CPU used by POM systems. |
| Memory Usage % | The average percentage of RAM used by POM systems. |

| Field          | Description                                       |
|----------------|---------------------------------------------------|
| Server Name    | IP address of the POM System.                     |
| CPU Usage %    | The average percentage of CPU used by POM system. |
| Memory Usage % | The average percentage of RAM used by POM system. |

---

## POM Trusted Certificates

### Overview

The Experience Portal web console displays the Trusted Certificates page through which you can import or fetch trusted certificates.

### Adding trusted Certificate Authority certificates

**About this task**

Use this procedure to do the following:

- Download a CA certificate file to the POM server.
- Place the downloaded CA certificate file into the trust store of the POM server.



On Experience Portal, if you install a custom CA certificate and then POM with a custom certificate, ensure that you establish communication among all internal POM servers.

To establish communication, you must first ensure that POM completes the exchange of certificates, and copies the updated trust store of the primary POM server on all auxiliary POM servers.

Location of the trust store on the POM primary server: `$POM_HOME/config/pomTrustStore`

### Procedure

1. Log in to Avaya Experience Portal with the credentials of an administrator.
2. In the navigation pane, click **Proactive Outreach > Manager**.
3. On the **Configurations** menu, click **Trusted Certificates**.  
POM displays all trusted certificates that you can import.
4. On the Trusted Certificates page, click **Import**.
5. On the Add Certificates page, do the following:
  - a. In **Name**, type the name of the certificate.
  - b. In **Enter Certificate Path**, click **Choose File**.  
From the location of the file, select the file.
  - c. Click **Continue**.
6. Open a command prompt terminal to the POM server.
7. In the terminal, run the following command:  
**POM restart**
8. For the changes to take effect, restart all POM services on the server.

## Importing a POM CA certificate on the Flex server

### About this task

Use this procedure to place a POM CA certificate from the POM server to the Flex server.

### Before you begin

Ensure that you enable the Kafka SSL configuration on the flex cluster.

For more information, see *How to deploy Flex Eventing from CCM* in *Flex CCM installation guide*.

### Procedure

1. In a web browser, type the IP of the POM server as follows:  
`https://<pomserver>/axis2/`
2. Download the POM CA certificate file to your local server by using the steps that are specific to your browser.
3. Convert the format of the downloaded CA certificate file into the *.pem* format.

For example, do the following:

- a. Open an SSH session to the POM server.

You can use an application such as PuTTY.

- b. In the SSH session, to convert the format of the downloaded CA certificate file to the `.pem` format, run the following command:

```
openssl x509 -inform der -in axis2cert.cer -out axis2cert.pem
```

Ensure that the CA certificate file that you store on the Flex server is in the `.pem` format.

4. From the POM server, copy the CA certificate file to the Flex server.

5. Open an SSH session to the Flex server.

You can use an application such as PuTTY.

6. In the session, log on to the Flex server with the credentials of a root user.

7. In the session, to fetch the CA certificate file in the `pomadmin` service truststore, run the following command:

```
ccm release cert-manager crtmgr -ac pomadmin-service-pomadmin-
service-truststore <file location>/axis2cert.pem
```

You can use the inventory service to configure the elements that you need to establish a connection to the POM server.

8. To establish a connection to the POM server, use the inventory service by configuring the required elements.

## Trusted Certificates page field descriptions

| Name                                                                  | Description                                                                                                                                                                                                                                                                                         |
|-----------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b>                                                           | The name of the certificate.                                                                                                                                                                                                                                                                        |
| <b>Certificates</b>                                                   | <p>The attributes of the certificate:</p> <ul style="list-style-type: none"> <li>• Owner</li> <li>• Issuer</li> <li>• Serial Number</li> <li>• Signature Algorithm</li> <li>• Valid From</li> <li>• Valid Until</li> <li>• Certificate Fingerprints</li> <li>• Subject Alternative Names</li> </ul> |
| You see the following fields when you click the <b>Import</b> button: |                                                                                                                                                                                                                                                                                                     |

*Table continues...*

| Name                                                                 | Description                                                                                                                                                                     |
|----------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b>                                                          | The name of the certificate.                                                                                                                                                    |
| <b>Enter Certificate Path</b>                                        | The folder path of the local system containing the trusted certificate file.                                                                                                    |
| You see the following fields when you click the <b>Fetch</b> button: |                                                                                                                                                                                 |
| <b>Name</b>                                                          | The name of the certificate.                                                                                                                                                    |
| <b>Location</b>                                                      | The path of the certificate in the <code>https://&lt;IP Address&gt;</code> format.                                                                                              |
| Button                                                               | Description                                                                                                                                                                     |
| <b>Import</b>                                                        | To import a new certificate.                                                                                                                                                    |
| <b>Fetch</b>                                                         | To fetch a new certificate.<br><br> <b>Note:</b><br>In FIPS mode the fetch button is disabled. |

## POM Zone Configuration

### Overview

Zoning is the ability of partitioning a system into multiple zones. You can create zones for better control of resources and licenses. You can use zones for geographically distributed systems and also for large local systems.

 **Note:**

POM supports zoning within the same data center and does not support zoning across the data center or across geographic deployment.

For more information about zones, see *Avaya Experience Portal* documentation.

Use this page to manage the different zones between multiple POM servers. You can also use this page for managing zone failover where you can allocate campaign director (CD) or agent manager (AM) for a selected zone.

 **Note:**

For a single POM server system set up, you do not need to change settings on this page.

For a single POM server system set up with only default zone, you can allocate only one CD and AM.

For a single POM server system set up with multiple zones, you must manually allocate the CD and AM to other zones. The system automatically allocates the primary CD and AM to the default zone.

For a multiple POM server system set up with default zone you can have multiple CD, AM and Rule Engine. The system automatically allocates the primary CD and AM to the default zone. If needed you can change the CD and AM allocation.

**\* Note:**

To change the allocation of the Agent Manager, you must first logout the agents, then stop the Agent Manager services across all servers, and then reassign the Agent Manager to the zones. You need to restart the Agent Manager services for the changes to take effect.

For a multiple POM server system set up with multiple zones, you can allocate same CD and AM to different zones or different CD and AM to different zones.

In a multiple POM server setup, if the allocated CD or AM fails, any other running CD or AM manages the zone. The system displays the running CD or AM as the current CD or AM for the specific zone. When the allocated CD or AM starts functioning, it resumes the zone management and the system displays the allocated CD or AM as the current CD or AM.

If the allocated CD or AM values are empty you cannot allocate a CD or AM to any zone. To allocate CD or AM, add at least one POM server.

If no CD or AM is available to serve the zone, the value for the current CD or AM is displayed as None.

For more information about creating and managing zones, see *Avaya Experience Portal* documentation.

## Zone Configuration page field descriptions

To view the Zone Configuration page through Avaya Experience Portal web portal, you must click **Proactive Outreach > Manager > Configurations > POM Zone Configuration**.

| Field or Button              | Description                                                                                            |
|------------------------------|--------------------------------------------------------------------------------------------------------|
| <b>CD Zone Configuration</b> |                                                                                                        |
| <b>Zone</b>                  | Displays the list of zones created on the Avaya Experience Portal server.                              |
| <b>Allocated CD</b>          | Specify the primary Campaign Director (CD) to assign to the specific zone.                             |
| <b>Current CD</b>            | Displays the current Campaign Director (CD) managing the specific zone.                                |
| <b>Apply</b>                 | Use to apply changed Campaign Director for the zone.                                                   |
| <b>AM Zone Configuration</b> |                                                                                                        |
| Selection check box          | Use to select the zone that you want to reset.                                                         |
| <b>Zone</b>                  | Displays the list of zones created on the Avaya Experience Portal server.                              |
| <b>Allocated AM</b>          | Specify the primary Agent Manager (AM) to assign to the specific zone.                                 |
| <b>Current AM</b>            | Displays the current Agent Manager (AM) managing the specific zone.                                    |
| <b>Logged in Agents</b>      | Displays the total number of agents in that zone.                                                      |
| <b>Save</b>                  | Use to save the changed Agent manager for the zone.                                                    |
| <b>Save and Apply</b>        | Use to apply the changed the zone ownership from current Agent manager to the allocated Agent manager. |

## Configuring zone failover settings

### About this task

Use this procedure to change the state and failover setting of a zone for an active campaign.

### Before you begin

Associate at least one contact list to the job of the zone to which you want to perform a zone failover operation.

If you do not do this operation, the zone failover does not work and an active campaign cannot dial contacts from the failover zone.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Dashboard**.
2. In Supervisor Dashboard, click **Zone Settings** .

The system displays the Zone Settings page.

**Zone Name** displays the zones that are configured in POM.

3. Click **Edit**  corresponding to the zone.
4. In the **Zone State** field, set the state for the zone.
5. In the **Failover Zone** field, assign a failover zone for the zone.

You can assign a failover zone only when you are setting the state of the zone displayed in the **Zone Name** field to Down.

This field does not display zones that are in a Down state.

6. Click **Save** .

The **Save** option is available after you perform changes in the zone settings.

However, if your user account does not have the required privileges to modify the zone settings, the **Save** option remains unavailable.

---

## POM Licenses

### Overview

Zoning is the ability of partitioning a system into multiple zones. You can create zones for better control of resources and licenses. You can use zones for geographically distributed systems and also for large local systems.

For more information about zones, see *Avaya Experience Portal* documentation.

Use this page to configure POM licenses for a zone. Depending on your user role, you can view or change the POM licenses settings for a zone.

POM has separate licenses for Outbound ports, Preview Agents, Manual Agents, and Predictive Agents. You can allocate licenses to different zones and then to different organizations under each zone. If you do not have zones, all licenses are assigned to the default zone and default organization. Licenses are not shared across zones.

For fresh installation or upgrade, the system allocates all available licenses to the default organization of the default zone.

 **Note:**

For upgrade, if you have enabled organizations, post upgrade to 3.0.3 or above, you must manually assign the licenses to all organizations.

If you log in as an Org user with view only permissions for license page, you can view only those licenses that are allocated to the organizations and zone to which the organization belongs.

The system displays the difference between sum of licenses of a type for all zones and the *System capacity* as *Unused licenses*.

If the total number of licenses of all organizations under a zone is less than the licenses allocated to that zone, then the system displays the remaining license count under *Unallocated* for that zone.

While assigning licenses to zones and organizations remember the following:

- License value across all organizations in a zone cannot exceed the value you configure for a given zone.
- License value for all zones in the system cannot exceed the system capacity of licenses in the system.
- If you delete a zone, all licenses of the zone move to the Unused pool. The licenses are not shared or distributed automatically to other zones.
- If you delete an organization, all licenses of the organization move to the Unallocated pool. The licenses are not shared or distributed automatically to other organizations.
- If you increase the System capacity, then the system does not automatically reassign the licenses to zones and organizations. The extra licenses are displayed as Unused licenses. If required, you can manually reassign the licenses.
- If you decrease the System capacity, then the licenses are automatically proportionately reduced from all zones and organizations within the zones.

## Licenses page field descriptions

To view the Licenses page through Avaya Experience Portal web portal, you click **Proactive Outreach > Manager > Configurations > Licenses**.

| Field or Button              | Description                                                                                                                                                                                          |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>System Capacity</b>       | Displays the total available licenses. This value is the value you specify on the Licensing page. For more information, see <a href="#">POM License Settings page field descriptions</a> on page 67. |
| <b>Unused licenses</b>       | Displays the difference between the sum of the licenses of a type for all zones and the <i>system capacity</i> as <i>Unused licenses</i> .                                                           |
| <b>Zone</b>                  | Displays the zones that are created in Avaya Experience Portal.                                                                                                                                      |
| <b>Organization</b>          | Displays the organizations that are associated with the specific zone.                                                                                                                               |
| <b>External selection</b>    | Displays the system capacity that is provided in POM for External Selection feature.                                                                                                                 |
| <b>Manual</b>                | Displays the distribution of Manual dialing licenses for different zones and organizations.                                                                                                          |
| <b>Outbound Ports</b>        | Displays the distribution of available outbound ports across zones and organizations.                                                                                                                |
| <b>Predictive</b>            | Displays the distribution of Predictive dialing licenses for different zones and organizations.                                                                                                      |
| <b>Preview</b>               | Displays the distribution of Preview agent licenses across zones and organizations.                                                                                                                  |
| <b>Agent Web API Service</b> | Displays the distribution of Agent Web API Service licenses across zones and organizations.                                                                                                          |
| <b>Allocated</b>             | Displays the number of licenses allocated to a zone or organizations under that zone.                                                                                                                |
| <b>Unallocated licenses</b>  | Displays the difference between the licenses allocated to a zone and the sum of licenses allocated to all organizations under that zone.                                                             |

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## Global Configurations

### Overview

Use the Global Configurations page to manage the settings, such as call, email, campaign, callback, pacing, and DNC settings, across all campaigns. You can also override these settings at individual campaign level or campaign strategy level.

### Configuring global settings

#### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Global Configurations**.
3. On the Global Configurations page, add the relevant details.
4. Click **Save** to save and apply the changes.

## Global Configurations page field descriptions

### Call Settings

| Field or Button                            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|--------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Maximum call time (min)</b>             | <p>Specify the maximum time, in minutes, for which the call can remain active.</p> <p>The default value is 60. The minimum and maximum allowed values are 5 and 120 respectively.</p> <p>When a voice campaign is running, the POM server places calls to various contacts. In the event of any server malfunction, such as the server stops responding, the POM server does not get notifications for completion of calls, the POM ports engaged in the calls are not released, and the reports are not updated.</p> <p>To prevent this, the POM server starts a timer having a duration equal to the value specified in this field. If the POM server does not get any notification about the call completion within this duration, it updates the records and performs the related cleanup activities.</p> <p>Set this value to the maximum anticipated call duration. Setting this value too low can result in premature cleanup activities resulting in system malfunction. Setting this value too high can delay recovery of the system in case the server stops responding.</p> <p> <b>Note:</b></p> <p>This is not the actual telephony call time.</p> |
| <b>Maximum call in-progress time (min)</b> | <p>Specify the maximum interval, in minutes, to wait for the first disposition from a call after which the POM server asserts that no response is received for the call.</p> <p>The default value is 5. The minimum and maximum allowed values are 1 and 15 respectively.</p> <p>When a voice campaign is running and the POM server places calls to various contacts, the POM server waits for the duration configured in this field for receiving the first disposition for the call attempt.</p> <p>If the POM server does not receive the disposition within the specified duration, it treats the attempt as failed and aborts the attempt.</p> <p>Setting this value to a higher value than the default value can delay recovery of the system in case of failures. Setting this value too low can cause malfunctioning and undesired multiple calls to the same contact in case of genuine delays too.</p>                                                                                                                                                                                                                                                                                                                                |

*Table continues...*



| Field or Button                           | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Override PAI with Sender's Address</b> | <p>If you select the check box, POM overrides the P-Asserted-Identity (PAI) set at the platform level with the sender's address field from the campaign strategy.</p> <p>You can use this check box for both Agent and None modes. If you are using the None mode and the agents are attached to a predictive campaign, the changes take effect immediately. If the agents are attached to a preview campaign, the agents must login again for the changes to take effect.</p> |

## Campaign Settings

| Field or Button     | Description                                                                                                                                                                                                                                                                 |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Weekend days</b> | <p>Select the days of the weekend for a campaign.</p> <p>You can set days as weekend days. In the campaign strategy, this value is used to determine the week days if the <b>Weekdays only</b> property is set in the Address node.</p> <p>The default value is Sunday.</p> |

*Table continues...*

| Field or Button                      | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|--------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Maximum allowed nuisance rate</b> | <p>In case of agentless campaigns, if POM detects a live voice for the call and the first prompt is not played within two seconds, POM treats the call as a silent or nuisance call.</p> <p>In case of agent-based campaigns, if POM detects a live voice for the call and does not find an agent within two seconds, POM treats the call as a silent or nuisance call.</p> <p>The POMDriver application records the offsets of the Start of Voice timer and the first prompt play time from the connect in the database. When the first prompt play offset - Start of Voice offset is &gt; 2000 milliseconds, and the result is live voice, POM counts the call as a nuisance call.</p> <p>You can configure the false positive rate for nuisance rate calculations from <b>Configurations &gt; Global Configurations</b> or on the Campaign Creation page.</p> <p>For agent-based campaigns, the Nuisance Rate is calculated using the following formula:</p> $\text{NCR} = ((\text{Nuisance Calls} - \text{EstAbandToAnsMach}) + \text{AMDFalsePositiveRate} * (\text{Calls PassedToLiveAgent} - \text{CallsToAnsMachToLiveAgent})) / ((\text{Nuisance Calls} - \text{EstAbandToAnsMach}) + (\text{CallsPassedToLiveAgent} - \text{CallsToAnsMachToLiveAgent}))$ $\text{EstAbandToAnsMach} = (\text{CallsToAnsMachToLiveAgent} * \text{NuisanceCalls}) / \text{CallsPassedToLiveAgent}$ <p>For agentless campaigns, the Nuisance Rate is calculated using the following formula:</p> $\text{NuisanceRateTillNow} = (((\text{NuisanceCalls} + (\text{AnsweredCalls} * \text{FalsePositiveRate}))) / (\text{total})) * 100$ <p>The answered calls are calls which are answered by human and handled by a live agent. In case of agentless campaigns, the answered calls are calls with <b>ANSWER_HUMAN</b> completion code.</p> <p>The following are the system completion codes:</p> <ul style="list-style-type: none"> <li>• <b>DISCONNECTBYUSER</b></li> <li>• <b>DISCONNECTED_BY_SYSTEM</b></li> <li>• <b>DISCONNECTED_BY_SYSTEM_CCA</b></li> <li>• <b>DISCONNECTED_BY_SYSTEM_NUISANCEAPP</b></li> <li>• <b>DISCONNECTED_BY_USER_CCA</b></li> <li>• <b>DISCONNECTED_BY_USER_NUISANCEAPP</b></li> <li>• <b>CALLANSWERED</b></li> <li>• <b>LIVEVOICE</b></li> </ul> |

Table continues...

| Field or Button                                                | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|----------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                | <ul style="list-style-type: none"> <li>• <b>NUISANCE_CALL</b></li> <li>• <b>BgrndAMD_NUISANCE_CALL</b></li> </ul> <p>The default value is 3. The minimum and maximum allowed values are 0.1 and 99.0 respectively.</p> <p>If the nuisance rate exceeds the configured value for a campaign, POM generates an alarm POMCD003. If the nuisance rate exceeds the configured value for the day, POM generates an alarm P_POMCD918.</p> <p>POM checks and calculates the nuisance rate at an interval of every 20 seconds. In some cases, some live connects are detected falsely as answering machine connects. You need to consider such cases and reduce the value based on the estimate of false answering machine detects. Hence, for the default value of 3, if it is estimated that 0.25 of all live connects are detected falsely as answering machines, configure the value as 2.75. The campaign administrator needs to take an appropriate action upon receiving the alarms.</p> <p>For more information about Start of Voice timer and Live Voice, see the POM Driver application from <a href="#">shipped applications</a> on page 663.</p> |
| <b>Campaign data export limit per file (Number of records)</b> | <p>Specify the number of records to export per .csv file.</p> <p>The default value is 65000 records per .csv file. You can specify any value between 1500 to 500000.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Maximum preview time (min)</b>                              | <p>Specify the time duration, in minutes, for which POM must provide the preview of a contact to the agent.</p> <p>This parameter is applicable for preview campaigns only.</p> <p>If an error condition occurs when the call is transferred to an agent and the agent is previewing the call, the call state remains as preview for a long time. An example of an error condition is when the desktop stops responding.</p> <p>POM cleans up the call state after the maximum preview time elapses.</p> <p>The default value is 10 minutes. The minimum and maximum allowed values are 5 and 30 minutes respectively.</p> <p> <b>Note:</b></p> <p>If the preview time is configured in campaign strategy, POM ignores the <b>Maximum preview time (min)</b> value.</p>                                                                                                                                                                                                                                                                                          |

*Table continues...*

| Field or Button                                                  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Supervisor Dashboard Interval Data retention period (min)</b> | <p>Type the duration, in minutes, for which POM must retain the interval data. For example, if you specify 70 minutes, POM deletes the interval data after every 70 minutes.</p> <p>The default value is 62 minutes. The minimum and maximum allowed values are 62 and 2880 minutes respectively.</p> <p> <b>Note:</b></p> <p>If you change the value of the field, you must restart Campaign Director for the changes to take effect.</p>                                                                                                                                                                                  |
| <b>Ignore Un-attempted contacts from reports</b>                 | Select this check box if you do not want to generate history for the contacts that are not dialed by the Campaign Manager.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Allow StoppedCallback Job State</b>                           | <p>If you select this check box, then when a user manually stops a campaign that has pending callbacks, the campaign state changes to Stopped Callback. POM attempts the pending callbacks until all callbacks are completed.</p> <p>However, if the user stops a campaign that is in the Stopped Callback state and the callbacks are pending, the campaign state changes to Completed. POM attempts the pending callbacks only after the same campaign is run again.</p> <p>If you clear this check box, then when a user manually stops a campaign that has pending callbacks, the campaign state changes to Completed. POM attempts the pending callbacks only after the same campaign is run again.</p> |
| <b>Attempt behavior for empty Address</b>                        | <p>You can skip an attempt on an empty address field during a Retry operation and try the next available address as per the configuration in the campaign strategy.</p> <p>Click one of the following to decide the dialing behavior in case of an empty address:</p> <ul style="list-style-type: none"> <li>• <b>Do not skip empty Address</b></li> <li>• <b>Skip empty Address and move to next Address immediately</b></li> <li>• <b>Skip empty Address and move to next Address after retry interval</b></li> </ul>                                                                                                                                                                                      |
| <b>Perform contact validations before pacing</b>                 | <p>If you select this check box, POM performs contact validation against DNC, guard time, and restrictions before performing agent availability, license availability, and pacing checks.</p> <p>If you clear this check box, POM performs contact validation against DNC, guard time, and restrictions after performing agent availability, license availability, and pacing checks.</p> <p>If you clear this check box, then for agent-based campaigns, agent utilization might get affected as contact checks are performed after agent availability check.</p>                                                                                                                                           |

Table continues...

| Field or Button                              | Description                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Allow recycle of completed contacts</b>   | <p>If you select this check box, POM allows dialing the contacts from an existing campaign job even if the contacts are dialed earlier and the campaign job is marked as completed.</p> <p>By default, this option is disabled.</p>                                                                                                                                                                          |
| <b>Enable parallel dialing</b>               | <p>If you select this check box, POM processes the contacts and dials multiple contacts simultaneously. This results in more dialing attempts. However, parallel dialing might not always follow the sorting order specified for a campaign.</p> <p>For the parallel dialing service to take effect, restart the Campaign Manager service on all POM servers.</p>                                            |
| <b>Traverse Retry Address List Only Once</b> | <p>If you select this check box, the result handler traverses the retry address list only once.</p> <p>While making retry attempts, after POM reaches the last address on the Retry Node, POM marks that attempt with the <code>End of Address List</code> completion code.</p>                                                                                                                              |
| <b>Retry Count per Completion Code</b>       | <p>If you select this check box, POM maintains the Retry attempts count per completion code. You can configure the Retry count and Retry completion code in the Retry node in campaign strategy.</p>                                                                                                                                                                                                         |
| <b>Allow Sorting By Phone Attribute</b>      | <p>If you select this check box, POM makes Phone attributes available for sorting on the filter template page under <b>Sort Details &gt; Value</b>. If you clear this check box, the Phone attributes do not appear on the Value drop-down menu. The changes to the <b>Allow Sorting By Phone Attribute</b> check box does not impact an existing filter template that has phone attributes in its sort.</p> |

### Callback Settings

| Field or Button                      | Description                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Enable time restriction</b>       | <p>Use this check box to indicate whether to apply time restriction for callback.</p> <p>If you select the check box, you can monitor the guard time of the Call task node of the selected campaign strategy and the guard time of the phone format based on the geographical location of the contact number before dialing a callback to customer.</p> <p>By default, this check box is cleared.</p> |
| <b>Default end time offset (min)</b> | <p>Specify the time, in minutes, for the default callback expiry. After the specified time, POM does not call back the given contact.</p> <p>The default value is 30 minutes. The minimum and maximum allowed values are 5 and 1440 minutes respectively.</p>                                                                                                                                         |

*Table continues...*

| Field or Button                                        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|--------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Retry time (min)</b>                                | <p>Specify the time, in minutes, for the default callback retry time. POM postpones the callback for the specified time period for a given contact.</p> <p>The default time is 30 minutes. The minimum and maximum allowed values are 5 and 360 minutes respectively.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Pre interval time (min)</b>                         | <p>Specify the time, in minutes, before the scheduled time that the callback must be picked up.</p> <p>The default time is 2 minutes. The minimum and maximum allowed values are 1 and 30 minutes respectively.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Maximum in queue time (min)</b>                     | <p>Specify the time, in minutes, after which the Campaign Manager must release any callback that is in the Callback_In_Queue state, and postpone the callback. The Campaign Manager also marks the contact as Attempt Timeout to release the outbound port.</p> <p>The default value is 30 minutes. The minimum and maximum allowed values are 5 and 60 minutes respectively.</p> <p>If you specify a higher value in the <b>Number of Callbacks in Queue</b> field, specify a higher maximum in queue time.</p>                                                                                                                                                                                                                        |
| <b>Maximum preview time (sec)</b>                      | <p>Specify the maximum preview time, in seconds, for the callbacks.</p> <p>The default value is set to 45 seconds. You can set this parameter to any value between 0 to 300 seconds.</p> <p> <b>Note:</b></p> <p>If you set the callback preview time to 0 seconds, the agent cannot cancel the callback.</p> <p>If you set the value of <b>Maximum preview time(sec)</b> to 0 and the AutoDialCallback parameter to <code>true</code>, POM dials the callback record immediately after delivering the record to the Agent Desktop.</p> <p>The AutoDialCallback parameter is available in the <code>pim_config</code> table in the POM database.</p> |
| <b>Convert Agent callback to Strict Agent callback</b> | <p>Select this check box to convert existing agent callback to strict agent callback.</p> <p>For a strict agent callback, POM tries to deliver the callback to the assigned agent for configured maximum number of attempts. After the maximum attempts are exhausted, POM assigns the callback to another suitable agent.</p>                                                                                                                                                                                                                                                                                                                                                                                                          |

*Table continues...*

| Field or Button                                             | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Maximum attempt count for Strict Agent callback</b>      | <p>Specify the maximum number of attempts for a strict agent callback.</p> <p>If the specific agent is unavailable, POM postpones the callback for the configured maximum number of times. After the callback is postponed for the maximum number of times, POM treats the strict agent callback as an existing agent callback and delivers it to an agent who has the matching skill.</p> <p>The minimum and maximum allowed values are -1 and 30, respectively.</p> <p>If the maximum attempt count is set to -1, POM does not give the callback to any other agent.</p>                                                                                                                                                                                                                                                                                                                        |
| <b>TimeZone Pending CallBack Duetime</b>                    | <p>Specify the time zone based on which POM must send the pending callback notifications.</p> <p>The following are the options:</p> <ul style="list-style-type: none"> <li>• <b>System Time Zone:</b> To send the pending callback notifications based on the time zone of the POM server.</li> <li>• <b>UTC:</b> To send the pending callback notifications based on UTC.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Callback Time Interval (+/- min from Scheduled Time)</b> | <p>Specify the time interval, in minutes, before and after a scheduled callback time. For example, if a scheduled callback is set at 5:00 P.M. and the interval is set as 15 minutes, the Callback Time Interval is 4:45 P.M. to 5:15 P.M.</p> <p>The Callback Time Interval avoids creation of multiple callbacks by agents in a small interval and ensures only a specified number of callbacks are allowed in a configured time interval, that is, +x/-x minutes from the schedule time.</p> <p> <b>Note:</b></p> <p>To disable this feature, set the <b>Callback Time Interval (+/- from Schedule Time)</b> to 0. The default value is 0.</p> <p>The minimum and maximum allowed values are 0 and 60 respectively.</p> <p>This feature is applicable only for Agent or Strict Agent type of callbacks.</p> |
| <b>Allowed Callback Count in Interval</b>                   | <p>Specify the maximum number of callbacks that can be created during the callback time interval configured in the <b>Callback Time Interval (+/- from Schedule Time)</b> field.</p> <p>The minimum and maximum allowed values are 1 and 100 respectively.</p> <p>This field is available only after you set the <b>Callback Time Interval (+/- from Schedule Time)</b> value to 1 or more.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

*Table continues...*

| Field or Button                     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Number of Callbacks in Queue</b> | <p>Specify the maximum number of matured agent callbacks and strict agent callbacks that POM can add to the call queue of each agent when the agent is busy on another call or is wrapping up a call.</p> <p>The minimum and maximum allowed values are 1 and 15 respectively.</p> <p>The default value is 1.</p> <p>POM assigns the In Progress status to the matured callbacks that are added to the call queue.</p> <p>If an agent callback or strict agent callback matures while the agent is busy attending another call, POM adds the callback to the call queue of the agent provided the total number of callbacks already present in the call queue is less than the maximum number of callbacks in queue configured.</p> <p>If an agent logs off or is unnailed while the callbacks are pending in the call queue of the agent, POM postpones the callbacks as per the configured callback retry interval.</p> <p>If an agent requests to go on a break while the callbacks are pending in the call queue of the agent, the agent state changes to Pending Not Ready. No new matured callbacks are added to the call queue of the agent. However, the agent must complete all pending callbacks from the call queue. After the agent completes all the pending callbacks, the agent state changes to Not Ready.</p> <ul style="list-style-type: none"> <li>For agent callback: <p>If an agent callback matures when the call queue of the agent already contains the maximum number of callbacks permitted, the agent callback is converted into a standard callback. The callback is then assigned to another agent who has the matching skills and does not have any pending callback.</p> <p>If an agent callback matures and the agent for whom the callback is created is logged off or is in a Not Ready state, the agent callback is converted into a standard callback. The callback is then assigned to another agent who has the matching skills and does not have any pending callback.</p> <p>If no suitable agent is found, POM postpones the callback as per the configured callback retry interval.</p> </li> <li>For strict agent callback: <p>If a strict agent callback matures when the call queue of the agent already contains the maximum number of callbacks permitted, POM postpones the strict agent callback as per the configured callback retry interval.</p> <p>If a strict agent callback matures and the agent for whom the callback is created is logged off or is in a Not Ready state,</p> </li> </ul> |

*Table continues...*



| Field or Button                                           | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                           | <p>POM postpones the callback as per the configured callback retry interval.</p> <p>If a strict agent callback is retried for the maximum number of retries configured, POM treats the strict agent callback as an existing agent callback and assigns the callback to the next suitable agent with matching skills.</p> <p> <b>Note:</b></p> <p>For Expert Call Ratio (ECR) campaigns, Avaya recommends you set the <b>Number of Callbacks in Queue</b> value to the default value, that is 1, because a higher <b>Number of Callbacks in Queue</b> value increases the nuisance rate.</p> <p>The <b>Number of Callbacks in Queue</b> option is applicable only for agent callback and strict agent callback. If a standard callback or campaign callback matures, the callback is assigned to an agent who has the matching skill and does not have any pending callback. If no suitable agent is found, POM postpones the callback as per the configured callback retry interval.</p> |
| <b>Process pending callbacks before moving to Inbound</b> | <p>If you select this check box, then when a request to move a blend agent to inbound activity is triggered, the agent state changes to Pending Inbound. No new matured callbacks are added to the call queue of the agent. However, the agent must complete all pending callbacks from the call queue. After the agent completes all the pending callbacks, the agent is moved to inbound.</p> <p>Clear this check box if you want to move the blend agent to inbound activity immediately when a request to move the agent to inbound activity is triggered. The agent is moved to inbound after the agent completes the current call. POM postpones all callbacks in the call queue of the agent as per the configured callback retry interval.</p>                                                                                                                                                                                                                                                                                                                    |

## Pacing Settings

| Field or Button              | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Initial call hit rate</b> | <p>This parameter is applicable only for cruise control and ECR pacing.</p> <p>The value you specify in this parameter is used as an initial value for the algorithm to calculate the hit rate at run time.</p> <p>The minimum and maximum allowed values are 0.01 and 1.0 respectively. The default value is 0.5.</p> <p>POM uses this value to process the calls initially for five minutes. After five minutes, POM calculates the actual hit rate.</p> |

*Table continues...*

| Field or Button                  | Description                                                                                                                                                                                                                                                                                                                                  |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Initial handle time (sec)</b> | <p>This parameter is applicable only for cruise control and ECR pacing.</p> <p>The value you specify in this parameter includes the actual call time and the wrapping up time required by the agent to end the call.</p> <p>The minimum and maximum allowed values are 1 and 3600 seconds respectively. The default value is 60 seconds.</p> |

## Contacts Settings

| Field or Button           | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Global date format</b> | <p>Select the global date format.</p> <p>The default is DD-MM-YYYY hh:mm:ss.</p> <p>POM uses the date format for date and time comparisons for operations, such as, contact import and campaign strategy creation.</p> <p>For example, if you have a MeetingTime attribute with data type as DATE, TIME, or TIMESTAMP, the records for this attribute must match with the global date format.</p> <p> <b>Note:</b></p> <p>Ensure you set the global date format to match the date setting according to the language selected on the Speech Server (TTS).</p> <p>For example, if the language pack is set to en-US on TTS, set the global date format to MM-DD-YYYY in this parameter.</p> <p>Following is the list of supported date formats:</p> <ul style="list-style-type: none"> <li>• DD-MM-YYYY hh:mm:ss</li> <li>• MM-DD-YYYY hh:mm:ss</li> <li>• YYYY-DD-MM hh:mm:ss</li> <li>• YYYY-MM-DD hh:mm:ss</li> <li>• DD.MM.YYYY hh:mm:ss</li> <li>• MM.DD.YYYY hh:mm:ss</li> <li>• YYYY.DD.MM hh:mm:ss</li> <li>• YYYY.MM.DD hh:mm:ss</li> <li>• DD/MM/YYYY hh:mm:ss</li> <li>• MM/DD/YYYY hh:mm:ss</li> <li>• YYYY/DD/MM hh:mm:ss</li> <li>• YYYY/MM/DD hh:mm:ss</li> </ul> <p>When importing contacts, the contact attributes are validated against the global date format. The custom attribute values are stored in the database in a fixed format. The attribute data types and the corresponding format used to store the attributes in database are as follows:</p> <ul style="list-style-type: none"> <li>• Date: The Date format is stored as dd-MM-yyyy</li> <li>• Time: The Time format is stored as HH:mm:ss</li> <li>• Timestamp: The Timestamp is stored as dd-MM-yyyy HH:mm:ss</li> </ul> |

*Table continues...*

| Field or Button                  | Description                                                                                                                                                                                                                                                                                                                                                                                        |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                  | The global date format is used for validating attributes when importing contact data, to display the attribute values in the contact browser, and to validate the user input value on the Campaign Creation page.                                                                                                                                                                                  |
| <b>Contact import batch size</b> | Specify the number of records that can be imported into the POM database in a single batch from a file or database.<br><br>The default value is 500. The minimum and maximum allowed values are 10 and 2000 respectively.                                                                                                                                                                          |
| <b>Contact delete batch size</b> | Specify the number of contact records that can be marked for deletion at one time from the POM system for the given job.<br><br>The default value is 1000. The minimum and maximum allowed values are 10 and 10,000 respectively.                                                                                                                                                                  |
| <b>Contact filter batch size</b> | Specify the number of contact records to be filtered for a job in a single batch.<br><br>While running a campaign, the contact records matching the filter criteria are filtered and queued for processing in batches for the campaign. This parameter specifies the size of a single batch.<br><br>The default value is 500. The minimum and maximum allowed values are 10 and 2000 respectively. |
| <b>Contact export batch size</b> | Specify the number of contact records to be exported in a single batch.<br><br>The default value is 500. The minimum and maximum allowed values are 10 and 7000 respectively.                                                                                                                                                                                                                      |
| <b>Home country</b>              | Select the home country. POM marks this country as the default country.<br><br>The default value is <b>USA and Canada</b> .                                                                                                                                                                                                                                                                        |
| <b>Country code separator</b>    | Select the country code separator.<br><br>The default value is #.                                                                                                                                                                                                                                                                                                                                  |
| <b>FTP time out (msec)</b>       | Specify the time, in milliseconds, after which the FTP connection times out.<br><br>The minimum and maximum allowed values are 10000 and 900000 milliseconds respectively. The default value is 60000 milliseconds.                                                                                                                                                                                |
| <b>Record successful import</b>  | Select this check box to store the import status of successful records in the POM database.                                                                                                                                                                                                                                                                                                        |

*Table continues...*

| Field or Button                                             | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Block attempt on insufficient Guard Time Information</b> | <ul style="list-style-type: none"> <li>When <b>Enable Advanced Guard Time Configuration</b> is disabled:<br/> <p>If you select this check box, POM blocks the contact attempt in any of the following conditions:</p> <ul style="list-style-type: none"> <li>- If the time zone that is mapped to the area code of the record phone number does not have a guard time defined.</li> <li>- If the area code of the record phone number is not mapped to a time zone.</li> <li>- If different time zone mappings are identified for the same record. This happens when the area code of the record phone number has a mapped time zone. This mapping is done by using the <b>Manage time zone area code mapping</b> option. However, a different time zone is configured in the <b>Time Zone</b> phone attribute of the same record.</li> </ul> <p>If you clear this check box, POM attempts the contact even if a guard time cannot be determined for the record.</p> </li> <li>When <b>Enable Advanced Guard Time Configuration</b> is enabled:<br/> <p>POM considers only the time zone that is specified in the <b>Time Zone</b> phone attribute of the record to determine the guard time. Hence, if you select the <b>Block attempt on insufficient Guard Time Information</b> check box, POM blocks the contact attempt if no guard time is defined for the time zone that is configured in the <b>Time Zone</b> phone attribute of the record.</p> <p>If you clear this check box, POM attempts the contact even if a guard time cannot be determined for the record.</p> </li> </ul> |
| <b>Maintain insertion order during contact import</b>       | <p>If you select this check box, POM imports the contact records sequentially and inserts them into the POM contact list in the same order as present in the contact list data source.</p> <p>If you clear the check box, POM imports multiple batches of the contact records in parallel. Therefore, the contact data imported into the POM contact list has a different order as compared to the order in contact list source.</p> <p> <b>Tip:</b><br/> To speed-up the contact import process, clear this check box.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

## DNC Settings

| Field or Button                                     | Description                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>DNC update batch size</b>                        | Specify the number of DNC records that can be imported into the POM database in a single batch during DNC import.<br><br>The default value is 50. The minimum and maximum allowed values are 10 and 2000 respectively.                                                                                                                                                                       |
| <b>Apply DNC for callback</b>                       | If you select this check box, POM restricts the callbacks scheduled on DNC restricted addresses.                                                                                                                                                                                                                                                                                             |
| <b>Enable DNC check for preview dial and redial</b> | Select this check box to verify the contact for DNC before preview dialing and redial.<br><br>If you select this check box, POM shows an error message to the agent if the call is restricted due to DNC check during preview dialing or redial.<br><br>For backward compatibility, Agent Manager also verifies the contact address in the existing organization-based and common DNC lists. |
| <b>Record successful DNC import</b>                 | Select this check box to store the import status of the successful DNC records in the POM database.                                                                                                                                                                                                                                                                                          |

## Recorder Settings

| Field or Button                            | Description                                                                                                                                                                                                                                                                                                              |
|--------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Enable Recorder</b>                     | Select this check box to enable the recording client.<br><br>The other options in the <b>Recorder Settings</b> area are available after you select this check box.                                                                                                                                                       |
| <b>Enable Secured Connection</b>           | Select this check box to enable TLS-based secured connection between POM and the recorder application.<br><br>If you clear this check box, POM establishes TCP-based unsecured connection with the recorder.<br><br>For more information, see <a href="#">Enabling secured connection with the recorder</a> on page 593. |
| <b>Recorder port</b>                       | If you select the <b>Enable Secured Connection</b> check box, POM communicates with the recorder through a secured connection over port 7998.<br><br>The default port is 7999 for unsecured communication.<br><br>The minimum and maximum allowed values are 1024 and 65535 respectively.                                |
| <b>Send MediaComplete event every time</b> | Select this check box to send a MediaComplete event if <i>busy</i> or <i>no answer</i> is received for preview calls.                                                                                                                                                                                                    |

## Agent Settings

| Field or Button                                                   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Maximum job waiting duration (min)</b>                         | <p>Type the maximum job waiting duration, in minutes, after which POM generates an alarm for an outbound agent who is not associated with any job.</p> <p>The minimum and maximum allowed values are 10 and 60 minutes respectively. The default value is 20 minutes.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Minimum job attachment period (min)</b>                        | <p>Specify the time, in minutes, the agent must be in the job.</p> <p>This parameter is used in the agent balancing algorithm. When balancing agents, the algorithm considers this parameter value before detaching an agent from a campaign.</p> <p>The default value is 15 minutes. The minimum and maximum allowed values are 1 and 480 minutes respectively.</p> <p>For example, consider that the parameter value is set to 15 minutes. An agent is attached to job A for 12 minutes. Job B starts and the agent balancing algorithm decides to move the agent from job A to job B. The agent cannot be moved as the minimum value is set to 15 minutes.</p> <p>This parameter is not considered while detaching an agent when:</p> <ul style="list-style-type: none"> <li>• There is callback for an agent on another campaign.</li> <li>• An agent is moved by the supervisor.</li> <li>• An agent is released to inbound.</li> <li>• A job is snoozed.</li> </ul> |
| <b>Nailing retry interval (sec)</b>                               | <p>Specify the minimum time interval, in seconds, between the two nailing attempts for an agent.</p> <p>The default value is 20 seconds. The minimum and maximum allowed values are 10 and 1800 seconds, respectively.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Nailup call CLID</b>                                           | <p>POM displays the value you specify in this field as the sender's address in the nailup call of an agent.</p> <p>If you have provided a PAI value at the platform level, the value you specify in this field is not applicable.</p> <p>Nailup call CLID should not start with &amp; and should not contain special characters such as ` , ' , &lt; , &gt; , " .</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Maximum record waiting duration for attribute dialing(min)</b> | <p>Specify the maximum duration for which customer record is not available to dial for an agent. After this duration, POM raises a major alarm P_POMAGT57.</p> <p>Default duration is 10 minutes. The minimum and maximum allowed values are 10 and 60 minutes respectively.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

*Table continues...*

| Field or Button                                            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>ANI for external consult calls</b>                      | <p>When an agent initiates an external consult call, POM displays the ANI as the unique nailup call CLID or agent extension of the agent who initiates the external consult call.</p> <p>The default value is <b>Nailup call CLID</b>.</p> <p>The options available for ANI for external consult calls are as follows:</p> <ul style="list-style-type: none"> <li>• <b>Nailup call CLID</b></li> <li>• <b>Agent Extension</b></li> <li>• <b>Use campaign ANI</b></li> <li>• <b>Free form Text</b></li> </ul> <p>If you select <b>Use campaign ANI</b>, the outpulse ANI is displayed on the consultant's phone.</p> <p>If you select <b>Free form Text</b>, the value provided in the text box is displayed on the consulted party's phone. The text box is available only after you select the <b>Free form Text</b> option. Free form Text should not start with &amp; and should not contain special characters such as ` , ' , &lt; , &gt; , " .</p> |
| <b>Call queue</b>                                          | <p>If you select this check box, then for agent-based campaigns, when an agent is unavailable, POM queues the call. If the agent becomes available before the call disconnects, POM connects the call.</p> <p> <b>Note:</b></p> <p>If you select or clear the <b>Call queue</b> check box, restart the Agent Manager service for the changes to take effect.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Override PAI for External Consult Calls</b>             | <p>If you select this check box, you can override the PAI for external consult calls with the unique nailup call CLID or agent extension based on the value you select in the <b>ANI for external consult calls</b> field.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Enable Time Restriction for preview dial and redial</b> | <p>Select this check box to perform guard time check on contacts before preview dial and redial.</p> <p>If you select this check box, POM validates the dialing number against the guard time information. If the number does not meet the criteria, POM blocks the call and displays a message to the agent mentioning the guard time check failure.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Release agent in NOT READY state from outbound</b>      | <p>This check box is available only in CC Elite and AACC modes.</p> <p>Select this check box to release agents who are in a Not Ready state from outbound to inbound.</p> <p>By default, POM does not allow the blender to consider agents who are not ready (agents who are on break) for blending, and thereby, does not release those agents to inbound.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

Table continues...



| Field or Button                                               | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|---------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Release agent in IDLE state from outbound</b>              | <p>This check box is available only in CC Elite and AACC modes.</p> <p>Select this check box to release agents who are in an Idle state from outbound to inbound.</p> <p>By default, POM does not allow the blender to consider agents who are in an Idle state for blending, and thereby, does not release those agents to inbound.</p>                                                                                                                              |
| <b>Enable RFC2833 for AGTSendDTMF API of Agent Desktop</b>    | <p>If you select this check box, POM generates the RFC2833 DTMF sequence on invocation of AGTSendDTMF API from the Agent Desktop. Else, POM uses the in-band audio tones.</p> <p> <b>Note:</b></p> <p>Enable this feature only on Avaya Experience Portal 7.2.</p>                                                                                                                   |
| <b>Restrict Agent to receive out-of-band DTMF</b>             | <p>Select this check box to restrict the flow of out-of-band DTMF towards agent endpoint. However, the agent endpoint or desktop can send DTMF.</p>                                                                                                                                                                                                                                                                                                                   |
| <b>Restrict Customer to send and receive out-of-band DTMF</b> | <p>Select this check box to restrict the flow of out-of-band DTMF to and from the customer call leg during an agent-based campaign. This includes:</p> <ul style="list-style-type: none"> <li>• Preview</li> <li>• Progressive</li> <li>• Consult</li> <li>• Conference</li> <li>• Internal transfer</li> <li>• Redial</li> </ul>                                                                                                                                     |
| <b>Strict Nuisance Reporting</b>                              | <p><b>Strict Nuisance Reporting</b> is for reporting purpose only.</p> <p>Select this check box to mark the calls as Nuisance if the calls are connected with the agent after the Nuisance Duration for Agent Connect from:</p> <ul style="list-style-type: none"> <li>• Off hook in case of Background CCA or if CCA is OFF.</li> <li>• Start of voice in case of Enhanced CCA. If start of voice is not received, the calculation is done from off hook.</li> </ul> |

*Table continues...*

| Field or Button                                  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|--------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Nuisance Duration for Agent Connect(msec)</b> | <p>Specify the time duration, in milliseconds, used to calculate strict nuisance. Ensure this value is greater than the Live Voice Timeout value.</p> <p>The default value is 2000.</p> <p>For example, if Live Voice Timeout is 1800 msec, POM waits for at most 1800 msec after start of voice event for live voice detection. So, with 200 msec buffer for transferring the call to agent, the Nuisance duration can be set to 2000 msec.</p> <p>For buffer, take into account the network delay between POM, MPP, and Application server.</p> |
| <b>External Selection</b>                        | <p>Select this check box to enable the External Selection feature. The Agent Manager invokes the selection class from the external system that is connected to POM.</p> <p>For more information about enabling the External Selection feature for a campaign, see <a href="#">New / Edit Campaign page field descriptions</a> on page 78.</p>                                                                                                                                                                                                     |

## Event Settings

| Field or Button                     | Description                                                                                                                                                                                                                     |
|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Send Job State Events</b>        | <p>If you select this check box, the event SDK sends job state events.</p> <p>Job state events are generated when there is a change in the job state.</p>                                                                       |
| <b>Send Agent State Events</b>      | <p>If you select this check box, the event SDK sends agent state events.</p>                                                                                                                                                    |
| <b>Send Attempt Events</b>          | <p>If you select this check box, the event SDK sends attempt events.</p>                                                                                                                                                        |
| <b>Send Enriched Attempt Events</b> | <p>If you select this check box, the event SDK sends enriched attempt events.</p> <p>If you select the <b>Send Enriched Attempt Events</b> check box, the <b>Send Attempt Events</b> check box gets automatically selected.</p> |

## Supervisor Settings

| Field or Button                           | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|-------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Agent and supervisor configuration</b> | <p>Select this check box to apply the agent and supervisor configurations. When you select this check box, POM applies the following changes:</p> <ul style="list-style-type: none"> <li>• Agent must log in with an organization. The agent can be attached only to the campaigns belonging to that organization.</li> <li>• To view the agents in the Staffed agents view of Supervisor Dashboard, ensure the user has the POM Supervisor or Org POM Supervisor role, and also has agent groups assigned.</li> <li>• Users with the POM Supervisor or Org POM Supervisor role have access to Supervisor Dashboard. These users can view only the agents that are assigned to them.</li> <li>• Users with Administrator role can view all agents and do not require agent assignment.</li> <li>• Users with Org Administrator and Org POM Supervisor role can view all agents of their organization in Supervisor Dashboard, and do not require agent assignment.</li> <li>• Users with POM Campaign Manager or Org POM Campaign Manager role must have agents assigned to view agents in the Staffed agents view of Supervisor Dashboard. For this, the administrator must assign POM Supervisor or Org POM Supervisor role to the user.</li> </ul> <p> <b>Note:</b></p> <p>If you do not enable this configuration, the following occur:</p> <ul style="list-style-type: none"> <li>• The supervisor users can view all agents.</li> <li>• The <b>Organization</b> field in the agent reports displays an empty value. For more information on POM agent reports, see <i>Using Avaya Proactive Outreach Manager Reports</i>.</li> </ul> |

## Miscellaneous Settings

| Field or Button                         | Description                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>POM poller polling interval(sec)</b> | <p>Specify the POM poller time interval, in seconds, after which the POM poller keeps polling the EPM.</p> <p>POM poller is important for synchronizing various POM-related configurations between the POM server and EPMS plug-in such as licensing information, POM applications, POM users, and ports.</p> <p>The default value is 5 seconds. The minimum and maximum allowed values are 1 and 60 seconds respectively.</p> |

*Table continues...*

| Field or Button                                 | Description                                                                                                                                                                                               |
|-------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Agent script editor auto save time (min)</b> | Specify the time, in minutes, after which the agent script editor is saved automatically.<br><br>The default value is 1 minute. The minimum and maximum allowed values are 1 and 10 minutes respectively. |
| <b>Enable Agent Script security</b>             | Select this check box to enable the native Agent Script pages to perform extra validations for added security.                                                                                            |

## Advanced Settings

| Field or Button        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>JMS listen port</b> | <p>By default, ActiveMQ works in SSL mode with port 51617, and TCP mode is disabled.</p> <p>The minimum and maximum allowed values are 1024 and 65535 respectively.</p> <p>To enable TCP mode with port 51616, run the following script:<br/><b>enableTCPInActMQ.sh</b></p> <p>Example: <code>./enableTCPInActMQ.sh</code></p> <p>To disable TCP mode with port 51616, run the following script:<br/><b>disableTCPInActMQ.sh</b></p> <p>Example: <code>./disableTCPInActMQ.sh</code></p> <p>For more information, see the Active MQ documentation at: <a href="http://activemq.apache.org/xml-configuration.html">http://activemq.apache.org/xml-configuration.html</a></p> <p>To monitor Active MQ of POM for troubleshooting, use the URL: <code>http://&lt;Master ActiveMQ IP address&gt;:8161</code>.</p> <p>In case of conflict, you can change the default port. To change the port, you must log on to the POM server, type <code>cd \$POM_ACTMQ_DIR/conf</code>, and edit <code>jetty.xml</code> to change the port property under connectors node. If you have more than one POM servers, you must log on to every POM server and make the change.</p> |

*Table continues...*

| Field or Button                        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Pacer base port</b>                 | <p>The Campaign Manager uses the pacer base port to communicate with the pacer situated within the Agent Manager. The port is specific to a zone and for every zone you need a different port.</p> <p>The default value is 9995. The minimum and maximum allowed values are 1024 and 65535 respectively.</p> <p>At a time, you can have a maximum of 15 zones. So, 15 ports are used for communication if all zones are handled by one Agent Manager server.</p> <p>For example, if you have a single box system with three zones, the ports get assigned to the zones as shown below:</p> <ul style="list-style-type: none"> <li>• Zone1: 9995</li> <li>• Zone2: 9995</li> <li>• Zone3: 9995</li> </ul> <p>If the zones are distributed across servers, the same port number is used. For example, if you have three POM servers and three zones, with one zone on each server, the ports get assigned to the zones as shown below:</p> <ul style="list-style-type: none"> <li>• Zone1: 9995</li> <li>• Zone2: 9995</li> <li>• Zone3: 9995</li> </ul> |
| <b>Agent Initiated Pacer base port</b> | <p>The default value is 10005.</p> <p>The minimum and maximum allowed values are 1024 and 65535 respectively.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

*Table continues...*

| Field or Button         | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Router base port</b> | <p>The router, situated within the Agent Manager, uses the router base port to communicate with the nailer and driver applications situated within the application server.</p> <p>The port is specific to a zone and for every zone you need a different port.</p> <p>The default value is 7779. The minimum and maximum allowed values are 1024 and 65535 respectively.</p> <p>At a time you can have a maximum of 15 zones. So, 15 ports are used for communication if all zones are handled by one Agent Manager server.</p> <p>For example, if you have a single box system with three zones, the ports get assigned to the zones as shown below:</p> <ul style="list-style-type: none"> <li>• Zone1: 7779</li> <li>• Zone2: 7780</li> <li>• Zone3: 7781</li> </ul> <p>If the zones are distributed across server, the same port number is used. For example, if you have three POM servers and three zones, with one zone on each server, the ports get assigned to the zones as shown below:</p> <ul style="list-style-type: none"> <li>• Zone1: 7779</li> <li>• Zone2: 7779</li> <li>• Zone3: 7779</li> </ul> |

*Table continues...*

| Field or Button                 | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Agent manager base port</b>  | <p>The Agent Manager uses the Agent Manager base port to communicate with the desktop through Agent API provided in the Agent SDK.</p> <p>The port is specific to a zone and for every zone you need a different port.</p> <p>The default value is 9970. The default value is used as a management port for all zones managed by that server. Next values are used for zones.</p> <p>The minimum and maximum allowed values are 1024 and 65535 respectively.</p> <p>At a time you can have a maximum of 15 zones. So, 15 ports are used for communication if all zones are handled by one Agent Manager server.</p> <p>For example, if you have a single box system with three zones, the ports get assigned to the zones as shown below:</p> <ul style="list-style-type: none"> <li>• Zone1: 9971</li> <li>• Zone2: 9972</li> <li>• Zone3: 9973</li> </ul> <p>If the zones are distributed across servers, the same port number is used. For example, if you have three POM servers and three zones, with one zone on each server, the ports get assigned to the zones as shown below:</p> <ul style="list-style-type: none"> <li>• Zone1: 9971</li> <li>• Zone2: 9971</li> <li>• Zone3: 9971</li> </ul> |
| <b>Maximum concurrent jobs</b>  | <p>Specify the maximum simultaneous jobs POM can run at any given time.</p> <p>The minimum and maximum allowed values are 1 and 200 respectively. The default value is 50.</p> <p>The number of maximum simultaneous jobs is variable and depends on the number of task nodes in the campaign strategies associated with the jobs.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Maximum ports per server</b> | <p>Specify the maximum number of port licenses that can be used by the POM server.</p> <p>The default value is 1200. The minimum and maximum allowed values are 100 and 5000 respectively.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

*Table continues...*

| Field or Button                                    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Agent manager heart beat port</b>               | <p>Specify the port on which all Agent Managers communicate with each other.</p> <p>The default value is 8870.</p> <p>The minimum and maximum allowed values are 1024 and 65535 respectively.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Rule Engine port</b>                            | <p>Specify the port on which the Campaign Manager and Agent Manager communicate with the Rule Engine.</p> <p>The default value is 8779.</p> <p>The minimum and maximum allowed values are 1024 and 65535 respectively.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Days before certificate expiry alert</b>        | <p>Specify the number of days before certificate expiry POM must raise an alarm informing about the certificate expiry.</p> <p>The minimum and maximum allowed values are 30 to 60 days respectively.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Enable Advanced Guard Time Configuration</b>    | <p>Select this check box to apply the advanced guard time configurations to the contact for dialing. If you select this check box, you can do the following:</p> <ul style="list-style-type: none"> <li>• Bulk import the area code mapping defined for each country.</li> <li>• Export the area code mapping data.</li> <li>• Define guard times for a time zone and a state independently.</li> <li>• Define area code to state to time zone mapping.</li> </ul> <p> <b>Note:</b></p> <p>When you change the <b>Enable Advanced Guard Time Configuration</b> setting, you must clear all the contact lists and reimport the list for populating phone attribute values, such as time zone, state, and wireless according to the changed mapping.</p> <p> <b>Note:</b></p> <p>Advanced guard time is enabled by default.</p> |
| <b>Mark AMD Application Played Completion Code</b> | <p>Select this check box to mark the AMD Application Played completion code on termination of the application configured for handling Answer Machine. POM does not apply the completion code if the application is transferring the call.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

*Table continues...*



| Field or Button                                    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|----------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Protocols and their Order to try for a call</b> | <p>Specify comma separated list of protocols, with no spaces, to be used for placing calls. For example, <code>sip,sips,tel</code></p> <p>If you prefix the list with an asterisk (*), POM uses the protocols only from this list and ignores any protocol included in the URI.</p> <p>If you do not specify any protocol in this field, POM uses the protocol included in the URI.</p> <p>For more information, see <a href="#">Securing calls over SRTP</a> on page 594.</p> |

## Reporting Settings

| Button or Link                       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use different database for reporting | <p>Select the check box if you want to fetch POM reports from different (replicated) database. The reporting database is a replicated POM database. It is of the same type, same schema, and the same version as the active POM database and contains the same data as the active POM database.</p> <p>Select this check box to choose a database of one of the following types:</p> <ul style="list-style-type: none"> <li>• Postgres</li> <li>• Oracle</li> </ul> <p>If you select this option, then choose one of the following options or methods to connect the POM database to the reporting Oracle database:</p> <ul style="list-style-type: none"> <li>- SID</li> <li>- Service Name (use this option if POM database is also of Oracle type.)</li> <li>• MSSQL</li> </ul> <p>If you select this option, then choose one of the following options or methods of authentication.</p> <ul style="list-style-type: none"> <li>- SQLServer</li> <li>- Windows</li> </ul> <p>For example, if POM database is of MSSQL type, then you must select the reporting database of MSSQL type.</p> <p>If you do not select this option, POM fetches the reports from the POM database.</p> |

*Table continues...*

| Button or Link                           | Description                                                                                                                                                                                                                                                                                                                                                                                                                |
|------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Port Number                              | Displays the port number of the reporting database.<br>Default port numbers for the databases are as follows: <ul style="list-style-type: none"> <li>• 5432 to connect to Postgres database.</li> <li>• 1521 to connect to Oracle database.</li> <li>• 1433 to connect to MS-SQL database.</li> </ul> The minimum and maximum allowed values of the port for all three types of databases are 1024 and 65535 respectively. |
| Host name                                | The hostname or IP address of the reporting database.                                                                                                                                                                                                                                                                                                                                                                      |
| User Name                                | The username to connect to or log in to the reporting database.                                                                                                                                                                                                                                                                                                                                                            |
| Password                                 | The password to connect to or log in to the reporting database.                                                                                                                                                                                                                                                                                                                                                            |
| DB Name                                  | The name of the reporting database.                                                                                                                                                                                                                                                                                                                                                                                        |
| Select an Option                         | Select an option to connect to MSSQL server using SQLServer or Windows Authentication (Only for MSSQL database).                                                                                                                                                                                                                                                                                                           |
| Select an Option                         | Select an option to connect to an Oracle database using SID or Service Name:(Only for Oracle database).                                                                                                                                                                                                                                                                                                                    |
| Does Database require secured connection | Select this check box for secure database connection.                                                                                                                                                                                                                                                                                                                                                                      |
| Does Database require FIPS connection    | Use this option to enable or disable the Federal Information Protection Standard (FIPS) mode.                                                                                                                                                                                                                                                                                                                              |

### Button

| Button or Link | Description                                                                                                                                           |
|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reset</b>   | Click to reset all values on the Global Configurations page to the default values.                                                                    |
| <b>Cancel</b>  | Click to: <ul style="list-style-type: none"> <li>• Not apply the changes to the global configurations.</li> <li>• Return to the Home page.</li> </ul> |
| <b>Save</b>    | Click to save and apply the changes made to the global configurations.                                                                                |

## Enabling secured connection with the recorder

### About this task

Use this procedure to establish a secure TLS-based connection with the recorder.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Global Configurations**.
3. On the Global Configurations page, click the **Recorder Settings** tab.

4. In the **Recorder Settings** area, select the **Enable Recorder** check box.
5. Select the **Enable Secured Connection** check box.

The **Recorder port** changes to 7998 for secured connection.

**! Important:**

Restart the POM services after you enable or disable secured connection with the recorder.

6. On the **Configurations** menu, click **Servers** and export the POM server certificate.
7. Update the trust store of the recording client with the exported certificate for establishing a secure connection between POM and the recorder application.

**\* Note:**

For multiple server deployment of the recording application, all deployed application instances must contain the exported certificate in the respective trusted store.

Similarly, in case of multiple POM server deployment, copy the server certificate of every POM server to the trust store of every recording application.

8. Log on to the POM server with root credentials and restart the POM services by running the following command:

**POM restart**

## Result

On successful handshake, a socket connection is established on port 7998. All recording events from POM flow over this socket connection in the form of XML messages to the recorder application.

## Securing calls over SRTP

### Before you begin

To secure the customer and agent nailup calls, the media has to be sent over SRTP. For this, MPP provides use\_protocols hints that can be used by the CCXML applications when launching the calls.

Use this procedure to configure the protocols to be used for call launch or SIP invite.

The following table provides the format in which you can specify the protocols in the **Protocols and their Order to try for a call** field:

| Value      | Description                                                                                                               |
|------------|---------------------------------------------------------------------------------------------------------------------------|
| sips, sip  | This is the default value using which calls are launched over SIPS first. In case of failure, calls are retried over SIP. |
| *sips, sip | This enforces any tel or SIP URI to be converted into SIPS.                                                               |

### Procedure

1. Configure VOIP connection with TLS and SRTP enabled.

2. Stop the POM service.
3. Log on to the POM Administration Portal.
4. In the navigation pane, click **Proactive Outreach > Manager**.
5. On the **Configurations** menu, click **Global Configurations**.
6. On the Global Configurations page, click the **Advanced Settings** tab.
7. In the **Advance Settings** area, in the **Protocols and their Order to try for a call** field, specify the comma separated list of protocols.
8. Start the POM service.
9. Launch the POM campaigns and trace the SIP flows.
10. Verify the outbound INVITE.

The SDP offer must contain SRTP.

 **Note:**

In case of Invite failures, MPP SIP stack does a retry for certain SIP 4xx-client failure responses which are defined by `retry_sips` hints in CCXML. You can configure this hint in the POM database in the `pim_config` table. This hint is used for all customer and agent calls launched from the POM CCXML applications. With the default setting `retry_sips=488`, only a 488 SIP response is retried. This setting accepts the value `true` or a comma separated list of SIP response codes to retry. For example, `retry_sips=488,485,483`. The setting of `true` uses a default list of retry response codes, which currently consists of any SIP response greater than or equal to 480. However, this is not recommended as POM ends up retrying on `486:Busy Here` SIP response code.

---

## Purge Schedules

### Overview

Use this feature to enable POM to delete data from the database and files such as contact list import files, export files, DNC import files, and splitter files. These data might contain personal data.

By default:

- For all organizations, all types of purges are configured and scheduled to run daily at 00:00 hours.
- For all the upgrade installations, the existing purge schedules are not retained.

**\* Note:**

Purges get restricted when there is high load on POM. For more information on how restrictions are applied to purge, see *Purge schedules and database reindexing* section in *Avaya Proactive Outreach Manager Overview and Specification*.

**Related links**

[Database reindexing overview](#) on page 596

## Database reindexing overview

A POM admin or POM super admin can rebuild POM database indexes. Indexes are required to be rebuilt periodically according to the Avaya recommended ideal frequency. Database reindexing improves the overall performance of POM.

**\* Note:**

Reindexing is best performed during maintenance hours and should never be done during business hours to ensure the POM system stability.

Before initiating database reindexing, ensure there are no running campaigns and no active imports in the system. Otherwise, reindexing does not start. Click on the **Run Now** button to initiate database reindexing. When database reindexing is in progress, the **Last Executed** column shows `In Progress` status, and the **Run Now** button gets disabled. If POM services are restarted while reindexing is in progress, the reindexing stops and the **Run Now** button gets enabled again.

POM displays the following warnings based on the current database reindexing state:

- If the number of days since the last reindexing was performed exceeds the Avaya-recommended reindexing frequency, POM displays `Action needed - database reindexing is not executed since last <n> days`.
- If reindexing is performed according to the Avaya recommended ideal frequency, POM displays `No action needed`.
- When database reindexing is complete, restart POM services. If you do not restart POM services, POM displays `POM Services Restart Pending after Database Reindexing`.

**Related links**

[Overview](#) on page 595

## Configuring purge schedule

### About this task

Use this procedure to configure and schedule the following types of purges:

- File-based purges: When you run these purges, POM deletes all the files from the specific paths. The following are the file-based purges:
  - **Contact List Import Files**
  - **Export Files**
  - **DNC Import Files**

### - Splitter Files

- Database-based purges:

- **Campaign and Agent Data:** When you run these purges, POM deletes the following types of data from the database:

- All the contact-attempt records for the completed jobs.
- All the archived contact-attempt records for infinite campaigns.
- All the agent-related data for agent-based campaigns.

- **Database entries of Import:** When you run these purges, POM deletes the database entries created when importing the area code and contact list. An organization administrator has view-only permission for this purge. Only an administrator can configure to start this purge schedule, and the configured purge applies to all organizations. Therefore, when POM runs this purge, POM deletes the data belonging to all organizations.

## Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Purge Schedules**.
3. On the Purge Schedules page, add relevant information.
4. Click **Save**.

## Related links

[Purge Schedules page field descriptions](#) on page 597

## Purge Schedules page field descriptions

### Purge Schedules

Use this page to configure and schedule purges.

| Field               | Description                                                                                                                                                                                          |
|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Organization</b> | Use to select an organization.<br><br>This option is available only for an administrator. An administrator can use this list to configure and schedule purges for all the organizations as required. |
| <b>Select</b>       | Use the check boxes as required to select or deselect purges.                                                                                                                                        |

*Table continues...*

| Field       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b> | <p>Displays the name of the purge.</p> <p>The following are the types of file-based purges:</p> <ul style="list-style-type: none"> <li>• <b>Contact List Import Files</b></li> <li>• <b>DNC Import Files</b></li> <li>• <b>Export Files</b></li> <li>• <b>Splitter Files</b></li> </ul> <p> <b>Note:</b></p> <p>You can configure organization-specific file-based purges. An administrator can configure these purges for all the organizations. An organization administrator can configure these purges for their organization.</p> <p>The following are the types of database-based purges:</p> <ul style="list-style-type: none"> <li>• <b>Campaign and Agent Data</b></li> </ul> <p> <b>Note:</b></p> <p>An organization administrator has view-only permission for the <b>Campaign and Agent Data</b> purge. Only an administrator can configure this type of purge, and this configured purge applies to all organizations. Therefore, when you run this purge, POM deletes all the data belonging to all organizations.</p> <ul style="list-style-type: none"> <li>• <b>Database entries of Import</b></li> </ul> |

*Table continues...*

| Field                             | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Retention Period (In days)</b> | <p>Use to select the number of days POM retains the data at the specific location. You can specify only numeric characters in this field. POM deletes the records that are older than the retention period.</p> <p>This field also displays the default values or the values that you configure.</p> <p> <b>Note:</b></p> <ul style="list-style-type: none"> <li>• The <b>Campaign and Agent Data</b> purge retention period must be greater than any rules enabled in the rule editor. If the retention period is lesser than any rules enabled in the rule editor, POM prompts the user to disable the rules. If you continue, POM disables the rules. For restricted attempts, you cannot configure rules with a duration greater than the data retention period.</li> <li>• The retention period for the <b>Campaign and Agent Data</b> purge is calculated based on the campaign stop date and time. This calculation is also applicable for infinite campaigns. If an infinite campaign runs, POM does not delete the data until the campaign job is paused and restarted. For example, if the retention period is of five days, and the infinite campaign starts on the first day of the month, on the eleventh day, POM does not delete the campaign data older than five days. Consider that the same campaign stops on the twelfth day, and when the purge runs on the eighteenth day, POM searches the list of campaigns stopped before the configured retention period of five days and deletes the data. In this case, the data for the infinite campaign that stopped on the twelfth day gets deleted.</li> </ul> |
| <b>Path</b>                       | <p>Displays the location of the file to be purged.</p> <p>The path is not available for the following database-based purges: <b>Campaign and Agent Data</b> and <b>Database entries of Import</b>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Last Executed</b>              | <p>Displays the date and time when the purge was last executed. This field displays a hyphen (–) character to indicate that the purge schedule was never performed.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

*Table continues...*



| Field               | Description                                                                                                                                                                                                             |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Daily run at</b> | Use to specify the time, in <b>Hours</b> , <b>Minutes</b> , and <b>Seconds</b> , when the purging is scheduled to start every day.<br><br>This field also displays the default values or the values that you configure. |
| <b>Save</b>         | Use to save the configured purge schedule.                                                                                                                                                                              |

**\* Note:**

An administrator can configure and schedule a purge for all the organizations. An organization-administrator can configure and schedule to start a purge every day for the organization the administrator belongs to.

The campaign and Agent Data purge and the database entries of import purges are common for all organizations. Only an administrator can configure and schedule to start a purge when you select the default organization. An organization administrator has view-only permission for these purges. These purges run at the scheduled time configured for the default organization.

The following table contains the minimum, maximum, and default retention periods for the purges:

| Purge Type                 | Minimum Retention Period | Maximum Retention Period | Default Retention Period |
|----------------------------|--------------------------|--------------------------|--------------------------|
| Splitter Files             | 1                        | 15                       | 7                        |
| DNC Import Files           | 1                        | 15                       | 7                        |
| Export Files               | 1                        | 15                       | 7                        |
| ContactList Import Files   | 1                        | 15                       | 7                        |
| Database entries of Import | 1                        | 180                      | 90                       |
| Campaign and Agent Data    | 1                        | 180                      | 90                       |

## Database Reindexing

| Field                            | Description                                                                                                                                                                                                      |
|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b>                      | Database Reindexing.                                                                                                                                                                                             |
| <b>Ideal Frequency (In Days)</b> | Recommended interval in days to perform database reindexing. The recommended interval value is set to 60 days.<br><br><b>* Note:</b><br><br>Database reindexing must be performed periodically, once in 60 days. |

*Table continues...*

| Field                | Description                                                                                                                                                                                                                                                                                                                                |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Last Executed</b> | Timestamp of the last performed database reindexing or the current state of database reindexing. The following are the states: <ul style="list-style-type: none"> <li>• <b>In Progress</b>: Reindexing is in progress.</li> <li>• <b>-</b> : Reindexing never performed.</li> <li>• <b>Failed</b>: Reindexing did not complete.</li> </ul> |
| <b>Action</b>        | Click <b>Run Now</b> to initiate database reindexing. The <b>Run Now</b> button is disabled when a database reindexing is in progress.                                                                                                                                                                                                     |

### Related links

[Configuring purge schedule](#) on page 596

## Enhanced logging to comply with Global Data Protection Regulation

Logging in Proactive Outreach Manager is enhanced to comply with the Global Data Protection Regulation. You can choose to mask the sensitive data from the logs before providing these logs. The list of attributes that can be masked is present inside a configuration file `attributeToMask.txt` located on Proactive Outreach Manager server inside directory `$POM_HOME/bin`. By default all the attributes are commented with the leading hashtag (#). To mask any of the attributes from the log files you need to uncomment. To uncomment you need to remove the leading hashtag(#) from specific attributes. If all the attributes need to be masked, you need to uncomment the line with `.ATTR`. However, masking all the attributes might impose difficulty in troubleshooting leading to increase in time to resolve any issue. Masking the attributes inside logs is optional.

After uncommenting the appropriate attributes, you need to execute the tool `dataScrubbing.sh` located on the Proactive Outreach Manager server inside directory `$POM_HOME/bin`. This script takes the directory path of the log files as the only argument.

You can copy the logs of a specific directory and provide the complete path of that directory as an input to the `dataScrubbing.sh` tool, where only specific logs are required to be provided..

For example: if only campaign manager logs are needed, then copy all the `PIM_CmpMgr.log` files to another directory, `/tmp/cmpmgrLogs` and execute the tool as `./dataScrubbing.sh /tmp/cmpmgrLogs`

When you execute the tool `./dataScrubbing.sh $POM_HOME/logs` The tool creates a directory `outputdir` inside the directory passed to it as an input. The `masked.zip` inside the directory `outputdir` contains all the logs with values of the configured attributes as masked.

Additionally, customer phone number from the application server (appserver) logs can also be masked. To implement this, you must uncomment any of phones, `phoneNumber.ATTR` or `.ATTR` inside the `attributeToMask.txt` file. Then execute the tool `dataScrubbing.sh` from `$POM_HOME/bin` directory. Example `./dataScrubbing.sh $APPSERVER_HOME/logs`

In case, the application server(appserver) is located external to the Proactive Outreach Manager server, then you need to copy the following files from the \$POM\_HOME/bin directory on the Proactive Outreach Manager server to any location on the external application server.

attributeToMask.txt.

dataScrubbing.sh.

AGTCommandsAnonymizer.py

---

## Country Specific Phone Settings

### Overview

Proactive Outreach Manager displays the Country Specific Phone Settings page through which you can define phone number reject patterns, time zone area code mappings, and dialing rules. You must restart Campaign Director services on all Proactive Outreach Manager servers after:

- importing or editing area code
- adding or editing phone reject pattern

The configuration updates become effective only after you restart Campaign Director services on all Proactive Outreach Manager servers.

### Manage country

#### Adding a country

##### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. On the Country Specific Phone Settings page, click **Add**.
4. Specify the values in the following fields:
  - **Country Name**
  - **Country Code**
  - **Standard phone minimum length**
  - **Standard phone maximum length**
  - **Phone prefix**
5. Click **Save**.

#### Add Country page field descriptions

Use this page to add a new country.

| Field or Button                      | Description                                                                                                                                                                                                                                                    |
|--------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Country Name</b>                  | Use to specify a country name.                                                                                                                                                                                                                                 |
| <b>Country Code</b>                  | Use to specify a country code.                                                                                                                                                                                                                                 |
| <b>Standard phone minimum length</b> | Use to specify the minimum length for the standard phone number. You can add any number up to 99 except 0. The default value is 3.                                                                                                                             |
| <b>Standard phone maximum length</b> | Use to specify the maximum length for the standard phone number. You can add any number up to 99 except 0. The default value is 15.                                                                                                                            |
| <b>Phone prefix</b>                  | Use to specify digits that are prefixed to the phone number while importing. If the phone number length is lesser than standard phone minimum length, then the digits you specify in the field are prefixed to the phone number before the number is imported. |
| <b>Save</b>                          | The button to save the changes.                                                                                                                                                                                                                                |

## Country Specific Phone Settings page field descriptions

Use this page to specify country specific phone settings.

| Field or Button                            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Show information only for country</b>   | Use the drop-down list to select the country for which to search the Country Specific Phone Settings.                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Go</b>                                  | Use to start the search.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Country Code</b>                        | Displays the country code.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Country Name</b>                        | Displays the country name.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Standard Phone Number Length</b>        | Displays the standard phone length for a country.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Phone prefix</b>                        | Displays the prefix for a country.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Actions</b>                             | <p>Click  to manage the phone reject patterns.</p> <p>Click  to manage the time zone area code mappings.</p> <p>Click  to manage the dialing rules.</p> <p>Click  to delete the Country Specific Phone Settings rule.</p> |
| <b>Add</b>                                 | Use to add a new country with Country specific phone settings.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Global Phone Number Reject Patterns</b> | Use to add global reject patterns for phone numbers.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

The following fields are available only if the area code job for country is in progress and advanced guard time configuration in global configurations is enabled.

| Field or Button                              | Description                                                             |
|----------------------------------------------|-------------------------------------------------------------------------|
| <b>Area Code Job in progress for country</b> | Displays the country for which the import or export job is in progress. |

*Table continues...*

| Field or Button | Description                                                                                                                                     |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Job Type</b> | Displays the type of the job executed.<br>The possible values are: <ul style="list-style-type: none"> <li>• Import</li> <li>• Export</li> </ul> |
| <b>Success</b>  | Displays the number of records imported or exported successful by the job.                                                                      |
| <b>Failure</b>  | Displays the number of records that failed during import or export.                                                                             |
| <b>Total</b>    | Displays the total number of records attempted for import or export by the job.                                                                 |
| <b>Refresh</b>  | Use to refresh the count of the records imported or exported by the job.                                                                        |
| <b>Stop</b>     | Use to stop the job.                                                                                                                            |

## Phone reject patterns

### Adding a phone number reject pattern

#### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. On the Country Specific Phone Settings page, click .
4. On the Manage Global Phone Number Reject Patterns page, click **Add**.
5. Specify the value for the **Pattern matching criteria**.
6. Click **Add**.

### Add Phone Number Reject Pattern page field descriptions

Use this page to add a phone number reject pattern.

| Field or Button                  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Pattern Matching Criteria</b> | <p>Use to specify the phone number pattern which must be rejected. POM rejects all phone numbers which match to this pattern. Reject patterns can be:</p> <ul style="list-style-type: none"> <li>• digits</li> <li>• *: Use as a wild card character. For example, 999* means any number starting with 999.</li> <li>• -: Use to specify a range of numbers. For example, 1–3, numbers from 1 to 3.</li> <li>• ?: Use to specify any single digit. One ? means 1 digit. For example 9?? means any 3 digit number starting with 9.</li> <li>• []; Use to specify either one of the number in the brackets. For example, [0–1] means any number starting with 0 or 1.</li> </ul> <p>POM provides a list of countries and the predefined reject patterns. For information about the reject patterns associated with countries, see <a href="#">Default phone number reject patterns for countries</a> on page 611.</p> <p>For examples, see <a href="#">Examples</a> on page 632.</p> |
| <b>Description</b>               | Use to specify a brief description for the reject pattern. Description should not contain special characters like ^, ~, ` , !, ' , ; , \$ , # , \ , < , > , & , " .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Add</b>                       | Use to add the reject pattern.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

## Editing the phone number reject pattern

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. On the Country Specific Phone Settings page, click .
4. On the Manage Global Phone Number Reject Patterns page, select the phone reject pattern to edit
5. Specify the value for the **Pattern matching criteria**.
6. Click **Save**.

## Edit Phone Number Reject Pattern page field descriptions

Use to change the phone number reject pattern.

### **Note:**

If you change a reject pattern after uploading contacts, then the changed reject pattern is not applicable to the existing contact records. The new reject pattern takes effect only for uploads you run after the new reject pattern is saved.

| Field or Button                  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Pattern matching criteria</b> | <p>Use to specify the phone number pattern which must be rejected. POM rejects all phone numbers which match the reject pattern. Reject patterns can be:</p> <ul style="list-style-type: none"> <li>• digits</li> <li>• *: Use as a wild card character. For example, 999* means any number starting with 999.</li> <li>• -: Use to specify a range of numbers. For example, 1–3, numbers from 1 to 3.</li> <li>• ?: Use to specify any single digit. One ? means 1 digit. For example 9?? means any 3 digit number starting with 9.</li> <li>• []; Use to specify either one of the number in the brackets. For example, [0–1] means any number starting with 0 or 1.</li> </ul> <p>POM provides a list of countries and the predefined reject patterns. For information about the reject patterns associated with countries, see <a href="#">Default phone number reject patterns for countries</a> on page 611.</p> <p>For examples, see <a href="#">Examples</a> on page 632.</p> |
| <b>Description</b>               | Use to specify a brief description for the reject pattern.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Save</b>                      | The button to save the changes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

## Manage Phone Number Reject Patterns page field descriptions

Use this page to define country specific reject patterns for the phone numbers. Before uploading any phone number POM checks the global and country specific reject pattern, and if the number matches with any of these patterns, then the number gets rejected.

| Field or Button     | Description                |
|---------------------|----------------------------|
| <b>Country code</b> | Displays the country code. |
| <b>Country name</b> | Displays the country name. |

*Table continues...*

| Field or Button                  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Pattern Matching Criteria</b> | <p>Use to specify the phone number pattern which must be rejected. POM rejects all phone numbers which match this pattern. Reject patterns can be:</p> <ul style="list-style-type: none"> <li>• digits</li> <li>• *: Use as a wild card character. For example, 999* means any number starting with 999.</li> <li>• -: Use to specify a range of numbers. For example, 1–3, numbers from 1 to 3.</li> <li>• ?: Use to specify any single digit. One ? means 1 digit. For example 9?? means any 3 digit number starting with the number 9.</li> <li>• []: Use to specify either one of the number in the brackets. For example, [0–1] means any number starting with 0 or 1.</li> </ul> <p>POM provides a list of countries and the predefined reject patterns. For more information about the reject patterns associated with countries, see <a href="#">Default phone reject patterns for countries</a> on page 611.</p> <p>For examples, see <a href="#">Examples</a> on page 632.</p> |
| <b>Description</b>               | Use to specify a brief description for the reject pattern.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Actions</b>                   | Use  to remove or delete the pattern.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Add</b>                       | Use to add the reject pattern.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

## Editing phone number parameters

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. On the Manage Country Specific Setting page, click the country name which you want to edit.
4. Specify the value for the **Standard phone minimum length**, **Standard phone maximum length**, and **Phone prefix** fields.
5. Click **Save**.

## Edit Phone Number Parameters page field descriptions

Use to edit the phone number parameters.

| Field or Button                      | Description                                                                                                |
|--------------------------------------|------------------------------------------------------------------------------------------------------------|
| <b>Country code</b>                  | Displays the country code.                                                                                 |
| <b>Country name</b>                  | Displays the country name.                                                                                 |
| <b>Standard phone minimum length</b> | Use to specify the minimum length for the standard phone number. You can add any number up to 99 except 0. |

*Table continues...*



| Field or Button                      | Description                                                                                                                                                                                                                                                    |
|--------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Standard phone maximum length</b> | Use to specify the maximum length for the standard phone number. You can add any number up to 99 except 0.                                                                                                                                                     |
| <b>Phone prefix</b>                  | Use to specify digits that are prefixed to the phone number while importing. If the phone number length is lesser than standard phone minimum length, then the digits you specify in the field are prefixed to the phone number before the number is imported. |
| <b>Save</b>                          | The button to save the changes.                                                                                                                                                                                                                                |

## Adding global phone number reject pattern

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. On the Country Specific Phone Settings page, click **Global Phone Number Reject Patterns**.
4. On the Manage Global Phone Number Reject Patterns page, click **Add**.
5. Specify the values for the **Pattern Matching Criteria** and the **Description** fields.
6. Click **Save**.

## Add Global Phone Number Reject Pattern page field descriptions

Use this page to add a global phone number reject pattern.

| Field or Button                  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Pattern matching criteria</b> | <p>Use to specify the phone number pattern which should be rejected. Any standard phone number matching with global reject pattern is not imported. POM provides a list of the global phone reject patterns:</p> <ul style="list-style-type: none"> <li>• *0000000*: Any number which includes 7 zeros.</li> <li>• *8888888*: Any number which includes 7 eights.</li> <li>• *9999999*: Any number which includes 7 nines.</li> </ul> <p>You can also have user defined patterns:</p> <ul style="list-style-type: none"> <li>• digits</li> <li>• *: Use as a wild card character. For example, 999* means any number starting with 999.</li> <li>• -: Use to specify a range of numbers. For example, 1–3, numbers from 1 to 3.</li> <li>• ?: Use to specify any single digit. One ? means 1 digit. For example 9?? means any 3 digit number starting with 9.</li> <li>• []: Use to specify either one of the number in the brackets. For example, [0–1] means any number starting with 0 or 1.</li> </ul> <p>POM provides a list of countries and the predefined reject patterns. For information about the reject patterns associated with countries, see <a href="#">Default phone number reject patterns for countries</a> on page 611.</p> <p>For examples, see <a href="#">Examples</a> on page 632.</p> |
| <b>Description</b>               | Use to specify a description for the reject pattern. Description should not contain special characters like ^~`!;\$#\<>&".                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Save</b>                      | The button to save the changes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

## Editing global phone number reject pattern

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. On the Country Specific Phone Settings page, click **Global Phone Number Reject Patterns**.
4. On the Manage Global Phone Number Reject Patterns page, click the pattern to edit.
5. Specify the values for the **Pattern matching criteria**, and **Description** fields.
6. Click **Save**.

## Edit Global Phone Number Reject Pattern page field descriptions

Use this page to change the global phone number reject pattern.

**\* Note:**

If you change a reject pattern after uploading contacts, then the changed reject pattern is not applicable to exiting contact records. The new reject pattern takes effect only for uploads you run after the new reject pattern is saved.

| Field or Button                  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Pattern Matching Criteria</b> | <p>Use to specify the phone number pattern which must be rejected. Any standard phone number matching with global reject pattern is not imported. POM provides a list of the global phone reject patterns:</p> <ul style="list-style-type: none"> <li>• *0000000*: Any number including 7 zeros.</li> <li>• *8888888*: Any number including 7 eights.</li> <li>• *9999999*: Any number including 7 nines.</li> </ul> <p>You can also have user defined patterns:</p> <ul style="list-style-type: none"> <li>• digits</li> <li>• *: Use as a wild card character. For example, 999* means any number starting with 999.</li> <li>• -: Use to specify a range of numbers. For example, 1–3, numbers from 1 to 3.</li> <li>• ?: Use to specify any single digit. One ? means 1 digit. For example 9?? means any 3 digit number starting with 9.</li> <li>• []: Use to specify either one of the number in the brackets. For example, [0–1] means any number starting with 0 or 1.</li> </ul> <p>POM provides a list of countries and the predefined reject patterns. For information about the reject patterns associated with countries, see <a href="#">Default phone number reject patterns for countries</a> on page 611.</p> <p>For examples, see <a href="#">Examples</a> on page 632.</p> |
| <b>Description</b>               | Use to provide a brief description for the pattern. Description should not contain special characters like ^~`!;\$#\<>&".                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Save</b>                      | The button to save the changes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

## Manage Global Phone Reject Patterns page field descriptions

Use this page to manage the global phone reject patterns. Global reject patterns are applicable for all countries. Any phone number matching with these patterns gets rejected.

| Field or Button                  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Pattern Matching Criteria</b> | <p>Use to specify the phone number pattern which must be rejected. Any standard phone number matching with global reject pattern is not imported. POM provides a list of the global phone reject patterns:</p> <ul style="list-style-type: none"> <li>• *0000000*: Any number which includes 7 zeros.</li> <li>• *8888888*: Any number which includes 7 eights.</li> <li>• *9999999*: Any number which includes 7 nines.</li> </ul> <p>You can also have user defined patterns:</p> <ul style="list-style-type: none"> <li>• digits</li> <li>• *: Use as a wild card character. For example, 999* means any number starting with 999.</li> <li>• -: Use to specify a range of numbers. For example, 1–3, numbers from 1 to 3.</li> <li>• ?: Use to specify any single digit. One ? means 1 digit. For example 9?? means any 3 digit number starting with 9.</li> <li>• []: Use to specify either one of the number in the brackets. For example, [0–1] means any number starting with 0 or 1.</li> </ul> <p>POM provides a list of countries and the predefined reject patterns. For details on the reject patterns associated with countries, see <a href="#">Default phone number reject patterns for countries</a> on page 611.</p> <p>For examples, see <a href="#">Examples</a> on page 632.</p> |
| <b>Description</b>               | Use to specify a brief description for the reject pattern.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Actions</b>                   | Use  to remove or delete the pattern.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Add</b>                       | Use to add the reject pattern.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

## Default phone number reject patterns for countries

This page provides a list of default phone number reject patterns for specified countries. You can edit the existing or add new reject patterns depending on your requirement.

| Reject Pattern        | Description                     |
|-----------------------|---------------------------------|
| <b>United Kingdom</b> |                                 |
| 999*                  | United Kingdom emergency number |
| <b>USA and Canada</b> |                                 |
| [0-1]*                | USA area code must be >= 200    |
| ???911*               | USA emergency number            |
| <b>South Africa</b>   |                                 |
| 10111                 | South Africa emergency number   |
| <b>Mexico</b>         |                                 |

*Table continues...*

| Reject Pattern     | Description                                                    |
|--------------------|----------------------------------------------------------------|
| 06                 | Mexico Police                                                  |
| 08                 | Mexico Police                                                  |
| <b>South Korea</b> |                                                                |
| 101*               | South Korean request for long distance call                    |
| 107*               | South Korean application for long distance call                |
| 110*               | South Korean report phone service trouble Confirming           |
| 112*               | South Korean report a crime or criminal Confirming             |
| 113*               | South Korean report public safety Confirming                   |
| 114*               | South Korean phone number information (directory assistance ?) |
| 115*               | South Korean application for domestic telegraph                |
| 116*               | South Korean time-of-day information Confirming                |
| 119*               | South Korean report fire Confirming                            |
| 120*               | South Korean civil affairs information                         |
| 123*               | South Korean report water service trouble                      |
| 127*               | South Korean report power service trouble                      |
| 129*               | South Korean report illegal drug                               |
| 131*               | South Korean weather forecast                                  |
| 134*               | South Korean travel information                                |
| 141*               | South Korean voice mailing service                             |
| 151*               | South Korean voice mailing service                             |
| 152*               | South Korean voice mailing service                             |
| 182*               | South Korean detective service                                 |
| 188*               | South Korean report to the Board of Audit and Inspection       |
| 0074*              | South Korean request for international call Confirming         |
| 0075*              | South Korean application for international telegraph           |
| 0077*              | South Korean application for international call                |
| 321166*            | South Korean (Inchon) automatic report of phone trouble        |
| 511166*            | South Korean (Pusan) automatic report of phone trouble         |
| 531166*            | South Korean (Taegu) automatic report of phone trouble         |
| 621166*            | South Korean (Kwangju) automatic report of phone trouble       |
| 21166*             | South Korean (Seoul) automatic report of phone trouble         |
| 421166*            | South Korean (Taejon) automatic report of phone trouble        |
| <b>Japan</b>       |                                                                |
| [1-9]*             | Japan area code must begin with 0                              |
| 0990*              | Japan 1-900 type number                                        |

*Table continues...*

| Reject Pattern               | Description                 |
|------------------------------|-----------------------------|
| <b>Ireland</b>               |                             |
| *999*                        | Ireland emergency number    |
| <b>China</b>                 |                             |
| 110*                         | China Emergency number      |
| 119*                         | China Fire Emergency number |
| <b>Chile</b>                 |                             |
| 131                          | Chile Ambulance             |
| 132                          | Chile Fire                  |
| 133                          | Chile Police                |
| 700*                         | Chile uncallable            |
| 800*                         | Chile uncallable            |
| 900*                         | Chile uncallable            |
| <b>Australia</b>             |                             |
| 000*                         | Australia emergency number  |
| 0055*                        | Australia 1-900 type number |
| 1144*                        | Australia emergency number  |
| <b>Russia and Kazakhstan</b> |                             |
| 0*                           | Russia reserved             |
| 1*                           | Russia reserved             |
| 2*                           | Russia reserved             |
| 5*                           | Russia reserved             |
| 6*                           | Russia reserved             |
| 7*                           | Russia reserved             |

## Basic guard time configuration

### Adding a time zone

#### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. From the Country Specific Phone Settings page, click  to open the Manage Time Zone Area Code Mapping page.
4. Click **Add Time Zone**.
5. Specify the **Time Zone** and **Description** for the selected country.
6. Click **Save**.

## Time Zone Area code Mapping page field descriptions

Use this page to map to specify phone number area code with time zone. POM uses this mapping while importing contacts to determine the time zones for phone numbers.

**\* Note:**

While importing the phone numbers, if the contact records already have time zone values then POM does not determine the time zone using this mapping. POM uploads the contact with user specified time zone value.

For examples on how POM determines the mapping, see [Examples](#) on page 632.

| Field or Button             | Description                                                                                                                                                                                                                                                  |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Country code</b>         | Displays the country code.                                                                                                                                                                                                                                   |
| <b>Country name</b>         | Displays the country name.                                                                                                                                                                                                                                   |
| <b>Default Time zone</b>    | Use the drop-down list to select the default time zone.                                                                                                                                                                                                      |
| <b>Save</b>                 | The button to save the changes.                                                                                                                                                                                                                              |
| <b>Time zone</b>            | Use the drop-down list to search for area codes for the selected time zone.                                                                                                                                                                                  |
| <b>Search for area code</b> | Use to specify an area code for which to search the standard phone number.                                                                                                                                                                                   |
| <b>Search</b>               | Use to start the search.                                                                                                                                                                                                                                     |
| <b>Time Zone</b>            | Displays the time zone you select for the corresponding area code.                                                                                                                                                                                           |
| <b>Area Code</b>            | Displays the area codes for the corresponding time zone.                                                                                                                                                                                                     |
| <b>Guard Times</b>          | Displays the guard times you have selected for specific time zone.                                                                                                                                                                                           |
| <b>Description</b>          | Use to specify a brief description for the mapping.                                                                                                                                                                                                          |
| <b>Actions</b>              | Use  to edit the time zone area code mapping.<br>Use  to delete or remove the mapping. |
| <b>Add Time Zone</b>        | Use to add a time zone for a country.                                                                                                                                                                                                                        |

The table lists the Time Zone ids POM uses, internally for display names. These time zone ids are used to calculate time zone offset and the daylight saving time for the time zone.

| Display Name                      | Time Zone Id        |
|-----------------------------------|---------------------|
| Newfoundland Standard Time        | Canada/Newfoundland |
| Atlantic Standard Time (Daylight) | Canada/Atlantic     |
| Atlantic Standard Time            | SystemV/AST4        |
| EST (Daylight)                    | EST5EDT             |
| EST                               | EST                 |
| CST (Daylight)                    | CST6CDT             |
| CST                               | SystemV/CST6        |

*Table continues...*

| Display Name                             | Time Zone Id    |
|------------------------------------------|-----------------|
| MST (Daylight)                           | MST7MDT         |
| MST                                      | MST             |
| PST (Daylight)                           | PST8PDT         |
| PST                                      | SystemV/PST8    |
| Alaska Standard Time                     | AST             |
| Hawaii-Aleutian Standard Time (Daylight) | US/Aleutian     |
| Hawaii-Aleutian Standard Time            | HST             |
| South Australia                          | Australia/South |
| North Australia                          | Australia/North |

## Add Time Zone page field descriptions

Use this page to add a time zone to a country and a guard time.

When you specify a guard time, you can ensure that POM places the call only during the specific guard times. You can enable the guard times from the campaign strategy.

Guard times for any contact work only if you configure the guard times for a specific time zone. If you do not configure the guard time for mapped time zone, or do not map the time zone to any area code, POM dials the numbers depending on whether the **Block attempt on insufficient Guard Time Information** check box is selected or cleared in the Global Configurations.

For examples on guard times, see [Examples](#) on page 632.

| Field or Button                            | Description                                                                                                                                                                                                                                                                                     |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Country code</b>                        | Use to specify country code for the mapping.                                                                                                                                                                                                                                                    |
| <b>Country name</b>                        | Displays the country name.                                                                                                                                                                                                                                                                      |
| <b>Time zone</b>                           | Use the drop-down list to select the time zone.                                                                                                                                                                                                                                                 |
| <b>Description</b>                         | Use to specify brief description for the time zone. Description should not contain special characters like ^~`!,\$#\<>&"                                                                                                                                                                        |
| <b>Area Code and Phone Starting Digits</b> |                                                                                                                                                                                                                                                                                                 |
| <b>Area code</b>                           | Use to specify an area code for the mapping.                                                                                                                                                                                                                                                    |
| <b>Phone Starting Digits</b>               | Use to specify starting digits of a phone number. A standard phone number is of format <area-code> <phone number>. You can add multiple digits that are separated by commas and can also use an — to specify a range of digits. For example, the starting digits can be 567, 578, 580–585, 590. |
| <b>Actions</b>                             | Use  to delete the mapping.                                                                                                                                                                                  |
| <b>Add</b>                                 | Use to add more rows.                                                                                                                                                                                                                                                                           |
| <b>Guard Times</b>                         |                                                                                                                                                                                                                                                                                                 |
| <b>Start day</b>                           | Displays the start day for the guard time.                                                                                                                                                                                                                                                      |

Table continues...



| Field or Button     | Description                                                                                                                                                                        |
|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>End day</b>      | Displays the end day for the guard time. For example, you can specify a guard time with start day as Monday and end day as Wednesday.                                              |
| <b>Start Hour</b>   | Displays the start time for the guard time.                                                                                                                                        |
| <b>Start Minute</b> | Displays the start minute for the guard time.                                                                                                                                      |
| <b>End Hour</b>     | Displays the end time for the guard time. For example, you can specify the start time as 9:00 am in any time zone that you want and the end time as 5:00 pm in the same time zone. |
| <b>End Minute</b>   | Displays the end minute for the guard time.                                                                                                                                        |
| <b>Actions</b>      | Use  to delete the guard time.                                                                    |
| <b>Add</b>          | Use to add more rows.                                                                                                                                                              |
| <b>Save</b>         | The button to save the changes.                                                                                                                                                    |

## Editing time zone area code mapping

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. From the Country Specific Phone Settings page, click  to open the Manage Time Zone Area Code Mapping page.
4. Click  to edit the mapping.
5. Specify the new **Area Code**, **Phone Starting Digits**.
6. Click **Save**.

## Edit Time Zone Area Code Mapping page field descriptions

Use this page to edit the time zone area code mapping for a selected country.

When you specify a guard time, you can restrict the contact calling time based on the contact's time zone. You can then enable the guard time from the campaign strategy. You can specify more than one guard times, provided the guard times do not overlap.

| Field or Button     | Description                                                                                               |
|---------------------|-----------------------------------------------------------------------------------------------------------|
| <b>Country code</b> | This field cannot be edited. Displays the country code you select for which to edit the mapping.          |
| <b>Country name</b> | This field cannot be edited. Displays the country name you select for which to edit the mapping.          |
| <b>Time zone</b>    | This field cannot be edited. Displays the time zone for which to edit the mapping.                        |
| <b>Description</b>  | Use to specify a brief description. Description should not contain special characters like ^~`!;\$#\<>&". |

*Table continues...*

| Field or Button                            | Description                                                                                                                                                                                                                                                                        |
|--------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Area Code And Phone Starting Digits</b> |                                                                                                                                                                                                                                                                                    |
| <b>Area code</b>                           | Use to specify an area code for the mapping.                                                                                                                                                                                                                                       |
| <b>Phone Starting Digits</b>               | Use to specify starting digits of a phone number. A standard phone number is of format <area-code> <phone number>. You can add multiple digits separated by commas and also use an — to specify a range of digits. For example, the starting digits can be 567, 578, 580–585, 590. |
| <b>Actions</b>                             | Use  to delete the mapping.                                                                                                                                                                       |
| <b>Add</b>                                 | Use to add more rows.                                                                                                                                                                                                                                                              |
| <b>Guard Times</b>                         |                                                                                                                                                                                                                                                                                    |
| <b>Start day</b>                           | Displays the start day for the guard time.                                                                                                                                                                                                                                         |
| <b>End day</b>                             | Displays the end day for the guard time. For example, you can specify a guard time with start day as Monday and end day as Wednesday.                                                                                                                                              |
| <b>Start Hour</b>                          | Displays the start time for the guard time.                                                                                                                                                                                                                                        |
| <b>Start Minute</b>                        | Displays the start minute for the guard time.                                                                                                                                                                                                                                      |
| <b>End Hour</b>                            | Displays the end time for the guard time. For example, you can specify the start time as 9:00 am in any time zone you want and the end time as 5:00 pm in the same time zone.                                                                                                      |
| <b>End Minute</b>                          | Displays the end minute for the guard time.                                                                                                                                                                                                                                        |
| <b>Actions</b>                             | Use  to delete the guard time.                                                                                                                                                                  |
| <b>Add</b>                                 | Use to add more rows.                                                                                                                                                                                                                                                              |
| <b>Save</b>                                | The button to save the changes.                                                                                                                                                                                                                                                    |

## Editing the phone starting digits for time zone

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. On the Manage Country Specific Setting page, click .
4. On the Time Zone Area Code Mapping page, click the area code from the list of time zones for which to edit the phone starting digits.
5. On the Phone Starting Digits window, add or edit the phone starting digits in the text box.
6. Click **Save**.

## Phone Starting Digits page field descriptions

Use this page to edit the phone starting digits for a specific time zone. You can add multiple phone starting digits with a single click.

| Field or Button              | Description                                                                                                                                                                                                                                                                            |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Area Code</b>             | Displays the area code you select.                                                                                                                                                                                                                                                     |
| <b>Phone Starting Digits</b> | Use to specify starting digits of a phone number. A standard phone number is of format <area code> <phone-number>. You can add multiple digits separated by commas and can also use an — to specify a range of digits. For example, the starting digits can be 567, 578, 580–585, 590. |
| <b>Save</b>                  | The button to save the changes.                                                                                                                                                                                                                                                        |

## Advanced Guard Time configuration

### Manage Area Codes and Guard Times

You can use the advanced area code configurations to add more granular rules related to guard time configuration.

You can use the Manage Area Codes and Guard Times page to do the following tasks for a selected country:

- Import area code mappings
- Export area code mappings
- Download exported area code mappings
- Manage area code mappings
- Configure guard times for time zones
- Configure guard times for states

POM 3.1.1 supports advanced guard time configuration. For POM 3.1.1, advanced area code mapping for **USA and Canada** is available.

After you enable advanced guard time, the existing time zone area code mappings are unavailable. However, POM provides time zone area code mapping only for **USA and Canada**.

#### **Note:**

- Advanced guard time is enabled by default.
- If the follow-the-sun dialing feature is enabled and you edit parameters such as the guard time of the state or time zone, the default time zone of the country, or the default guard time of the country, you must restart the Campaign Manager service on all POM servers for the changes to take effect.

### Importing area code mapping data

#### About this task

Use this procedure to import the area code mapping data.

#### Before you begin

Ensure that there is no campaign or contact import in progress when you begin.

## Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. On the Country Specific Phone Settings page, click the  icon of the country for which you want to configure the mapping.

The system displays the Import Area Code Mapping tab.

4. In the **Import File** section, click one of the following :

- **Upload CSV File to import area code mappings**
- **Local File to import area code mappings**

If you click **Local File to import area code mappings**, then enter the local path of the server.

5. In the **Delete Preference for Import** section, click one of the following :

- **Do not delete previous mappings**
- **Delete unlocked mappings**
- **Delete all mappings**

6. Click **Import**.

When the import starts, the system displays the Country Specific Phone Settings page where you can view the import status for the selected country.

## Import Area Code mapping tab field descriptions

Use this tab to import the area code mapping data for the selected country.

### **Note:**

If area code import is in progress, then ensure that campaign or contact import is not in progress.

| Name                                                | Description                                                                                                                                                                                                                                                                              |
|-----------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Selected Country</b>                             | The country that you selected for guard time configuration.                                                                                                                                                                                                                              |
| <b>Import File</b>                                  |                                                                                                                                                                                                                                                                                          |
| <b>Upload CSV File to import area code mappings</b> | To perform bulk import of area code mappings for the selected country. Use this option to upload a CSV file up to 5 MB. The CSV file must be a comma separated file with the following format:<br><br>Area Code, Starting Phone Digits, State, Time Zone, Daylight Saving Time, Wireless |

*Table continues...*

| Name                                           | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Local File to import area code mappings</b> | <p>To import a CSV file stored on a server. Use this field to import a file of more than 5 MB. When you click this option, POM displays the <b>Local Path</b> field to enter the path of the CSV file that you want to import.</p> <p>The CSV file must have a single line item for the combination of each area code and starting digits or its range.</p> <p>The CSV file must be a comma separated file with the following format:</p> <p>Area Code, Starting Phone Digits, State, Time Zone, Daylight Saving Time, Wireless</p> |
| <b>Delete preference for Import</b>            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Do not delete previous mappings</b>         | To overwrite the previous "unlocked" mappings.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Delete unlocked mappings</b>                | To delete the mappings that are marked as "Unlocked" for the selected country.                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Delete all mappings</b>                     | <p>To delete all mappings for the selected country.</p> <p> <b>Note:</b></p> <p>If you select this option, POM deletes both, "Locked" and "Unlocked" mappings.</p>                                                                                                                                                                                                                                                                                 |
| Button                                         | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Choose File</b>                             | To browse to the file to upload.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Import</b>                                  | To import the CSV file.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

## Exporting area code mapping data

### About this task

Use this procedure to export the area code mapping data.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. On the Country Specific Phone Settings page, click the  icon of the country for which you want to configure the mapping.  
The system displays the Import Area Code Mapping tab.
4. Click the Export Area Code Mapping tab.
5. In the **Export File** section, click **Export**.  
The system displays the Country Specific Phone Settings page.

6. Navigate back to Export Area Code Mapping tab.
7. In the **Download exported Area Code Mapping** section, select the exported .csv file from the **Select exported file to download** drop-down list.
8. Click **Download** to save the .csv file in the required location.

The .csv file is saved in the following format:

POM\_AC\_EXPORT\_<country code>\_<YYMMDD>\_<HHMM>.csv

For example, POM\_AC\_EXPORT\_1\_180724\_1259.csv.

## Export Area Code Mapping tab field descriptions

Use this tab to export the area code mapping data for the selected country.

| Name                                       | Description                                                 |
|--------------------------------------------|-------------------------------------------------------------|
| <b>Selected Country</b>                    | The country that you selected for guard time configuration. |
| <b>Download exported Area Code Mapping</b> |                                                             |
| <b>Select exported file to download</b>    | To select the exported file to download.                    |
| Button                                     | Description                                                 |
| <b>Export</b>                              | To export the CSV file.                                     |
| <b>Download</b>                            | To download the exported file.                              |

## Configuring a default time zone and guard time for a country

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. On the Country Specific Phone Settings page, click the  icon of the country for which you want to configure the mapping.

The system displays the Manage Area Codes and Guard Times page.

4. Click the Guard Time Configuration tab.
5. Click the following values:
  - **Default Time Zone**
  - **Default Guard Time**
6. Click **Save** to save the default values. To clear the default values, click **Clear**.

## Guard Time Configuration tab field descriptions

Use this tab to configure guard time for a time zone and state for the selected country.

| Name                                   | Description                                                    |
|----------------------------------------|----------------------------------------------------------------|
| <b>Default Time Zone</b>               | Select a default time zone for the country.                    |
| <b>Default Guard Time</b>              | Specify a default guard time for the country.                  |
| <b>Time Zone to Guard Time Mapping</b> |                                                                |
| <b>Time Zone</b>                       | Displays the time zone(s) configured for the selected country. |
| <b>Guard Time</b>                      | Displays the guard time(s) configured for the time zone(s).    |
| <b>State to Guard Time Mapping</b>     |                                                                |
| <b>State</b>                           | Displays the state(s) configured for the selected country.     |
| <b>Guard Time</b>                      | Displays the guard time(s) configured for the state(s).        |

## Adding Time Zone to Guard Time mapping

### About this task

Use this procedure to perform the following actions:

- Adding a new time zone to guard time mapping.
- Editing a time zone to guard time mapping.
- Deleting a time zone to guard time mapping.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. On the Country Specific Phone Settings page, click the  icon of the country for which you want to configure the mapping.
4. Click the Guard Time Configuration tab.
5. To add a new time zone to guard time mapping, in the Time Zone to Guard Time Mapping section, click **Add**.
6. Enter the following values and click **Save**:
  - **Time Zone**
  - **Description**
  - **Set Guard Time**

You can configure multiple guard times for a time zone by clicking the  icon. You can also delete a particular time zone entry by clicking the  icon.

7. To edit a time zone to guard time mapping entry, do the following:
  - a. In the Time Zone to Guard Time Mapping section, go to the entry that you want to edit and click the  icon.
  - b. On Edit Time Zone to Guard Time Mapping page, edit the entries that you want to change and click **Save**.
8. To delete a time zone to guard time mapping entry, do the following:
  - a. In the Time Zone to Guard Time Mapping section, go to the entry that you want to delete and click the  icon.
  - b. On the Confirm Delete dialog box, click **Yes**.

## Add or edit Time Zone to Guard Time mapping page field descriptions

Use this tab to configure time zone to guard time mapping for the selected country.

| Name                                                                                          | Description                                                                                                           |
|-----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| <b>Time Zone</b>                                                                              | Select the time zone to which you want to map the guard time.                                                         |
| <b>Description</b>                                                                            | Specify the description of the mapping provided. Description should not contain special characters like ^~`!;\$#\<>". |
| <b>Set Guard Time:</b> Configure the values to map the guard time for the selected time zone. |                                                                                                                       |
| <b>Start Day</b>                                                                              | Select the day when you want to start the guard time.                                                                 |
| <b>End Day</b>                                                                                | Select the day when you want to end the guard time.                                                                   |
| <b>Start Hour</b>                                                                             | Select the time in hours when you want to start the guard time.                                                       |
| <b>End Hour</b>                                                                               | Select the time in hours when you want to end the guard time.                                                         |
| <b>Start Minute</b>                                                                           | Select the time in minutes when you want to start the guard time.                                                     |
| <b>End Minute</b>                                                                             | Select the time in minutes when you want to end the guard time.                                                       |

| Icon Name                                                                           | Description                                        |
|-------------------------------------------------------------------------------------|----------------------------------------------------|
|  | Click to delete a time zone to guard time mapping. |
|  | Click to add a time zone to guard time mapping.    |



## Adding State to Guard Time mapping

### About this task

Use this procedure to perform the following actions:

- Add a new state to guard time mapping.
- Edit a state to guard time mapping.
- Delete a state to guard time mapping.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. On the Country Specific Phone Settings page, click the  icon of the country for which you want to configure the mapping.
4. Click the Guard Time Configuration tab.
5. To add a new state to guard time mapping, in the State to Guard Time Mapping section, click **Add**.
6. On the Add State to Guard Time Mapping page, enter the following values and click **Save**:
  - **State**
  - **Description**
  - **Guard Time**

You can configure multiple guard times for a state by clicking the  icon. You can also delete a particular entry by clicking the  icon.

7. To edit a state to guard time mapping entry, do the following:
  - a. In the State to Guard Time Mapping section, go to the entry that you want to edit and click the  icon.
  - b. On Edit State to Guard Time Mapping page, edit the entries that you want to change and click **Save**.
8. To delete a state to guard time mapping entry, do the following:
  - a. In the State to Guard Time Mapping section, go to the entry that you want to delete and click the  icon.
  - b. On the Confirm Delete dialog box, click **Yes**.

## Add or edit State to Guard Time mapping page field descriptions

Use this tab to configure state to guard time mapping for the selected country.

| Name                                                                                       | Description                                                       |
|--------------------------------------------------------------------------------------------|-------------------------------------------------------------------|
| <b>State</b>                                                                               | Enter the state to which you want to map the guard time.          |
| <b>Description</b>                                                                         | Specify the description of the mapping provided.                  |
| <b>Set Guard Time:</b> Configure the values to map the guard time for the specified state. |                                                                   |
| <b>Start Day</b>                                                                           | Select the day when you want to start the guard time.             |
| <b>End Day</b>                                                                             | Select the day when you want to end the guard time.               |
| <b>Start Hour</b>                                                                          | Select the time in hours when you want to start the guard time.   |
| <b>End Hour</b>                                                                            | Select the time in hours when you want to end the guard time.     |
| <b>Start Minute</b>                                                                        | Select the time in minutes when you want to start the guard time. |
| <b>End Minute</b>                                                                          | Select the time in minutes when you want to end the guard time.   |

| Icon Name                                                                           | Description                                    |
|-------------------------------------------------------------------------------------|------------------------------------------------|
|    | Click to delete a state to guard time mapping. |
|  | Click to add a state to guard time mapping.    |

## Set Default Guard Time dialog field descriptions

Use this dialog to set the default Guard Time.

| Name                | Description                                                       |
|---------------------|-------------------------------------------------------------------|
| <b>Start Day</b>    | Select the day when you want to start the guard time.             |
| <b>End Day</b>      | Select the day when you want to end the guard time.               |
| <b>Start Hour</b>   | Select the time in hours when you want to start the guard time.   |
| <b>End Hour</b>     | Select the time in hours when you want to end the guard time.     |
| <b>Start Minute</b> | Select the time in minutes when you want to start the guard time. |
| <b>End Minute</b>   | Select the time in minutes when you want to end the guard time.   |

## Adding area code to state to time zone mapping

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. On the Country Specific Phone Settings page, click the  icon of the country for which you want to configure the mapping.
4. On the Area Code Configuration tab, click **Add**.
5. On the Add Area Code to State to Time Zone Mapping page, enter the following values:
  - **Area code**
  - **State**
  - **Time Zone**
  - **DST Enabled**
  - **Description**
  - **Locked/Unlocked**
  - **Phone Start Digits**
  - **Wired Phone Start Digits**
  - **Wireless Phone Start Digits**
6. Click **Save**.

## Add or edit Area Code to State to Time Zone mapping field descriptions

Use this tab to configure area code to state to time zone mapping for the selected country.

| Name               | Description                                                                                                                                                                                                                                                                                                                                 |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Area Code</b>   | Specify the area code of the selected country.                                                                                                                                                                                                                                                                                              |
| <b>State</b>       | Select the state that you want map to the area code from the <b>State</b> drop down. This is an optional field.                                                                                                                                                                                                                             |
| <b>Time Zone</b>   | Select the time zone that you want to map to the area code and state from the <b>Time Zone</b> drop down.                                                                                                                                                                                                                                   |
| <b>DST Enabled</b> | Specify whether Daylight Savings time (DST) is enabled for the selected time zone. The <b>DST Enabled</b> field has the following possible values: <ul style="list-style-type: none"> <li>• <b>Yes</b>: Indicates that DST is enabled.</li> <li>• <b>No</b>: Indicates that DST is not enabled.</li> </ul> The default value is <b>No</b> . |

*Table continues...*

| Name                               | Description                                                                                                                                                                                                                                                                                          |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>                 | Specify the description of the mapping provided.                                                                                                                                                                                                                                                     |
| <b>Locked/Unlocked</b>             | Specify whether the mapping data is “Locked” or “Unlocked”. <ul style="list-style-type: none"> <li>• <b>Locked</b>: Indicates that POM does not overwrite the data during upgrade or import.</li> <li>• <b>Unlocked</b>: Indicates that POM overwrites the data during upgrade or import.</li> </ul> |
| <b>Phone Start Digits</b>          | Specify the starting phone digits for mapping. The value of <b>Phone Start Digits</b> is a single phone number or a range of phone numbers like 205 - 209.                                                                                                                                           |
| <b>Wired Phone Start Digits</b>    | Specify the starting phone digits of a wired phone for mapping. You can specify a single phone number or a range of phone numbers like 200, 205 - 209. This is an optional field.                                                                                                                    |
| <b>Wireless Phone Start Digits</b> | Specify the starting phone digits of a wireless phone for mapping. You can specify a single phone number or a range of phone numbers like 200, 205 - 209. This is an optional field.                                                                                                                 |

## Area Code Configuration tab field descriptions

This tab displays the area code to state to time zone mappings configured for the selected country.

| Name               | Description                                                                                                                                                                                                                                                                                                          |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Area Code</b>   | Displays the area code that is mapped to the state and time zone.                                                                                                                                                                                                                                                    |
| <b>State</b>       | Displays the state that is mapped to the area code and time zone.                                                                                                                                                                                                                                                    |
| <b>Time Zone</b>   | Displays the time zone that is mapped to the area code and state.                                                                                                                                                                                                                                                    |
| <b>DST Enabled</b> | Displays whether DST is enabled for the selected time zone. The <b>DST Enabled</b> field has the following possible values: <ul style="list-style-type: none"> <li>• <b>Yes</b>: Indicates that DST is enabled.</li> <li>• <b>No</b>: Indicates that DST is not enabled.</li> </ul> The default value is <b>No</b> . |
| <b>Description</b> | Displays the description of the mapping provided. This is an optional field.                                                                                                                                                                                                                                         |

*Table continues...*

| Name                      | Description                                                                                                                                                                                                                                                                                                     |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Type</b>               | Displays the following type of the time zone mapping data: <ul style="list-style-type: none"> <li>• System: All the mappings which POM provides during installation or upgrade, by default.</li> <li>• Custom: All the mappings which the user adds from the POM User Interface or area code import.</li> </ul> |
| <b>Locked/Unlocked</b>    | Displays if the mapping data is locked or unlocked. <ul style="list-style-type: none"> <li>• Locked: Indicates that POM does not overwrite the data during upgrade or import.</li> <li>• Unlocked: Indicates that POM overwrites the data during upgrade or import.</li> </ul>                                  |
| <b>Phone Start Digits</b> | Displays the starting phone digits for mapping. The value of <b>Phone Start Digits</b> is a single phone number or a range of phone numbers like 205 - 209.                                                                                                                                                     |

## Phone Start Digits dialog field descriptions

This dialog displays the Phone start digits for a selected Area code.

| Name                               | Description                                                                                                                                                                              |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Area Code</b>                   | The area code for which the Phone start digits are displayed.                                                                                                                            |
| <b>Phone Start Digits</b>          | Displays the starting phone digits for mapping. The value of <b>Phone Start Digits</b> is a single phone number or a range of phone numbers like 205 - 209.                              |
| <b>Wired Phone Start Digits</b>    | Displays the starting phone digits of a wired phone for mapping. The value of <b>Wired Phone Start Digits</b> is a single phone number or a range of phone numbers like 205 - 209.       |
| <b>Wireless Phone Start Digits</b> | Displays the starting phone digits of a wireless phone for mapping. The value of <b>Wireless Phone Start Digits</b> is a single phone number or a range of phone numbers like 205 - 209. |

## Dialing rules

### Adding a dialing rule

#### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.

3. On the Country Specific Phone Settings page, click .
4. On the Dialing Rules page, click **Add**.
5. Specify appropriate values for the fields.
6. Click **Save**.

## Add Dialing Rule page field descriptions

Use this page to add a new dialing rule.

| Field or Button              | Description                                                                                                                                                                                                                                                                                 |
|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Country code</b>          | Displays the country code.                                                                                                                                                                                                                                                                  |
| <b>Country name</b>          | Displays the country name.                                                                                                                                                                                                                                                                  |
| <b>Strip</b>                 | Use to specify the number of digits to remove from the start of the standard phone number before you apply the prefix.                                                                                                                                                                      |
| <b>Prefix</b>                | Use to specify special characters/digits that are prefixed to the standard phone number before dialing. You can specify special characters such as #, *, -. For example, you can have prefixes like *9, or #9                                                                               |
| <b>Description</b>           | Use to specify a brief description for the dialing rule. Description should not contain special characters like ^, ~, \, !, ', ;, \$, #, \, <, >, &, ".                                                                                                                                     |
| <b>Area Code</b>             | Use to specify area code for which the specified dialing rule is applicable. Dialing rule with no area code acts as default dialing rule for that country. There can be only one default dialing rule for a country.                                                                        |
| <b>Phone Starting Digits</b> | Use to specify starting digits of a phone number. A standard phone number is of format <area-code> <phone-number>. You can add multiple digits that are separated by commas and also use an — to specify a range of digits. For example, the starting digits can be 567, 578, 580–585, 590. |
| <b>Actions</b>               | Use  to delete the dialing rule.<br>Use  to edit the dialing rule.                                                    |
| <b>Add more rows</b>         | You can add more than 1 record at a single click. You can specify a dialing rule for different area codes at one time.                                                                                                                                                                      |
| <b>Add</b>                   | Use to add more rows.                                                                                                                                                                                                                                                                       |
| <b>Save</b>                  | The button to save the changes.                                                                                                                                                                                                                                                             |

## Dialing Rules page field descriptions

The dialing rule takes the standard phone number and country code as input and applies the appropriate rule to form a dial format number. These rules are applied only for dialing, and the standard phone numbers in the POM system are not changed.

| Field or Button     | Description                                                                                                                                                                                                                          |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Country code</b> | Displays the country code.                                                                                                                                                                                                           |
| <b>Country name</b> | Displays the country name.                                                                                                                                                                                                           |
| <b>Strip</b>        | Use to specify the number of digits to remove from the start of the standard phone number, before you apply a prefix.                                                                                                                |
| <b>Prefix</b>       | Use to specify special characters/digits that are prefixed to the standard phone number before dialing. You can specify special characters such as #, *,-. For example, you can have prefixes like *9, or #9.                        |
| <b>Area Code</b>    | Use to specify an area code for the selected country.                                                                                                                                                                                |
| <b>Description</b>  | Use to specify a brief description about the dialing rule.                                                                                                                                                                           |
| <b>Actions</b>      | Use  to edit the dialing rule.<br>Use  to delete the dialing rule. |
| <b>Add</b>          | Use to add a new dialing rule.                                                                                                                                                                                                       |

## Editing dialing rule

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. On the Country Specific Phone Settings page, click .
4. On the Dialing Rules page, click the dialing rule to edit.
5. Specify appropriate values in the fields.
6. Click **Save**.

## Edit Dialing Rule page field descriptions

Use this page to edit the dialing rule.

| Field or Button     | Description                                                                                                                                                                                                   |
|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Country code</b> | Displays the country code.                                                                                                                                                                                    |
| <b>Country name</b> | Displays the country name.                                                                                                                                                                                    |
| <b>Strip</b>        | Use to specify the number of digits to remove from the start of the standard phone number before you apply the prefix.                                                                                        |
| <b>Prefix</b>       | Use to specify special characters/digits that are prefixed to the standard phone number before dialing. You can specify special characters such as #, *,-. For example, you can have prefixes like *9, or #9. |

*Table continues...*

| Field or Button              | Description                                                                                                                                                                                                                                                                                  |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>           | Use to specify a brief description for the dialing rule. Description should not contain special characters like ^, ~, ` , !, ' , ; , \$ , # , \ , < , > , & , " .                                                                                                                            |
| <b>Area Code</b>             | Use to specify area code for which the specified dialing rule is applicable. Dialing rule with no area code acts as default dialing rule for that country. There can be only one default dialing rule for a country.                                                                         |
| <b>Phone Starting Digits</b> | Use to specify starting digits of a phone number. A standard phone number is of format <area-code> <phone-number> . You can add multiple digits that are separated by commas and also use an — to specify a range of digits. For example, the starting digits can be 567, 578, 580–585, 590. |
| <b>Actions</b>               | Use  to delete the dialing rule.                                                                                                                                                                            |
| <b>Add more rows</b>         | You can add more than 1 record at a single click. You can specify a dialing rule for different area codes at one time.                                                                                                                                                                       |
| <b>Add</b>                   | Use to add more rows.                                                                                                                                                                                                                                                                        |
| <b>Save</b>                  | The button to save the changes.                                                                                                                                                                                                                                                              |

## Editing phone starting digits for dialing rule

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Country Specific Phone Settings**.
3. On the Country Specific Phone Settings page, click .
4. On the Dialing Rules page, click the area code for which to edit the phone starting digits.
5. In the Phone Starting Digits window, add or edit the phone starting digits in the text box.
6. Click **Save**.

## Phone Starting Digits page field descriptions

Use this page to edit the phone starting digits for a specific dialing rule.

| Field or Button              | Description                                                                                                                                                                                                                                                                                                                                                                    |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Area Code</b>             | Displays the area code you select.                                                                                                                                                                                                                                                                                                                                             |
| <b>Phone Starting Digits</b> | Use the text box to edit the phone starting digits for the selected dialing rule. Use to specify starting digits of a phone number. A standard phone number is of format <area-code> <phone-number> . You can add multiple digits that are separated by commas and also use an — to specify a range of digits. For example, the starting digits can be 567, 578, 580–585, 590. |
| <b>Save</b>                  | The button to save the changes.                                                                                                                                                                                                                                                                                                                                                |



## Examples

This topic provides a list of examples for phone formats, dialing rules, reject patterns, and time zone area code mapping.

### Examples for phone formats

POM provides a list of G14 and other countries with the country codes and the phone formats. You can add a new country with the phone formats to the POM database. After you add a new country with the phone formats, you can then apply the other features such as the dialing rules, reject patterns, and time zone area code mapping to the phone numbers belonging to specific country. You must provide the country name, country code, standard phone length, and the prefix while adding a new country.

### Examples for reject patterns

You can specify a reject pattern for the phone number at a global level or a country specific pattern.

| Original number | After applying reject pattern                                                                                                      |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------|
| For USA [0–1]*  | POM rejects all numbers starting with 0 or For example, 189–730– (5687)                                                            |
| 288–888–8889    | Apply a global reject pattern — *8888888* which means any number which includes 7 eights. So POM does not import the phone number. |
| 998–456–4536    | Apply a user defined pattern — 99* which means any number starting with 99. So POM does not import the phone number.               |

### Examples for time zone and the area code mapping

In the Global Configuration, add the Home Country as India, and the country code separator as #. Assume that the time zone of the zone for the contact list import is GMT+05:30.

| Original number | Description                                                                                                                                                                                                                                                                                                                     |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1#520–555–4567  | The country code for this number is 1 and the area code is 520, This area is mapped to MST. in the POM database. So POM determines the time zone for the number as MST.                                                                                                                                                         |
| 52#051–2345     | The country code for this number is 52, but the number does not match with any of the area code time zone mapping defined for this country in the POM database and country 52 does not have a default time zone specified and hence the time zone of the zone for which contact is going to import, is used, which is GMT+5:30. |
| 520–123–4567    | The number does not contain a country code separator so POM uses the default country code of the country defined as Home country — in this case India. There is only one time zone defined (GMT+5:30) for India in the POM database, so POM uses (GMT+5:30) as the time-zone.                                                   |

### Examples for time zone and the area code mapping with guard times

You can specify a guard time for the phone number or time zone at a global level.

| Time zone      | Area code   | Phone starting digits                               | Guard times                           |
|----------------|-------------|-----------------------------------------------------|---------------------------------------|
| EST            | 521         | 622 ,623 ,631-634, 637, 638, 641-645, 647, 653, 662 | Sun-Sat 8:00 20:45                    |
| EST (Daylight) | 215         | Not defined                                         | Mon-Sat 8:00 20:45<br>Sun 13:30 20:45 |
| EST            | Not defined | Not defined                                         | Sun-Sat 9:00 19:45                    |
| PST            | 250         | 237, 239                                            | Sun-Sat 8:00 20:45                    |

| Original number | Time zone      | Description                                                                                                                                                                                                                                                                                                          |
|-----------------|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 521-631-6756    | EST            | The area code and the phone starting digits matches with the EST time zone. POM dials the number in the specified guard times between Sunday to Saturday from 8 am in the morning to 8:45 pm in the evening.                                                                                                         |
| 215-234-4345    | EST (Daylight) | The area code matches with the EST5EDT ( EST Daylight ). POM dials the number in the specified guard times between Monday to Saturday from 8 am in the morning to 8:45 pm in the evening and on Sunday from 1:30 pm in the noon to 8:45 pm in the evening.                                                           |
| 543-243-8974    | EST            | There is no area code mapping for the EST time zone, but there is EST time zone entry without any area code and the phone start digits so POM considers the phone number as default entry for EST. POM dials the number in the specified guard time between Sunday to Saturday from 7 am in the morning to 19:45 pm. |
| 250-234-1236    | PST            | POM does not find a match for 250 area code with phone start digits in PST time zone. POM applies no guard times and dials the number without any restriction.                                                                                                                                                       |
| 523-631-1289    | AST            | There is no such time zone configured. POM applies no guard time and dials the number without any restriction.                                                                                                                                                                                                       |

### Examples for state to guard time mapping

You can specify state to guard time mapping.

| State | Guard Time                                 |
|-------|--------------------------------------------|
| YT    | Sun-Mon 00:00 09:00<br>Tue-Wed 07:00 10:00 |
| WV    | Sun-Mon 00:00 05:00<br>Sun 13:30 20:45     |
| WI    | Sun-Sat 9:00 19:45                         |
| NU    | Sun-Sat 8:00 20:45                         |

### Examples for area code to state to time zone mapping

You can specify area code to state to time zone mapping.

| Area Code | State | Time Zone         | Phone starting digits                                       |
|-----------|-------|-------------------|-------------------------------------------------------------|
| 709       | NL    | America/St. Johns | 209-218<br>221-900                                          |
| 236       | BC    | America/Edmonton  | 302,303,363,367,368,375,<br>523-541                         |
| 250       | BC    | Canada/Mountain   | 219,223-227 782-795,<br>806,827,854,866,874,875,903,9<br>77 |
| 782       | PE    | America/Moncton   | 353,355,360,377,437,462,823,8<br>29,843,844,846,975,979     |

### Examples for dialing rule

Consider the dialing rule for US as:

| Strip | Prefix | Area code | Phone Starting Digits |
|-------|--------|-----------|-----------------------|
| 0     | 1      | -         | -                     |
| 3     | 1      | 408       | -                     |
| 2     | #9     | 408       | 222                   |

 **Note:**

The prefix settings specified on the Campaign Creation page over writes the rules specified in the dialing rules.

POM uses the dialing rule for US for the following numbers:

| Original number | Description                                                                                                                                           |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| 308-1236-751    | The area code 308 does not match any area code in the dialing rules, so POM applies the default dialing rule. POM dials the number as 1-308-123-6751. |
| 408-123-6751    | The area code 408 matches with area code present in the dialing rules, so POM applies the second dialing rule. POM dials the number as 1-123-6751.    |
| 408-222-3456    | The area code - phone starting digit (408-222) matches with the third dialing rule. POM dials the number as #982223456.                               |

## CC Elite Configurations

### Overview

The Experience Portal web console displays the CC Elite Configurations page through which you can configure and view the CTI setup details, Call Management System (CMS) server setup, and associated skills in POM database with CC Elite skills. Use the CTI setup configuration to connect to Avaya Aura® Communication Manager to fetch the agent skill information and store in POM. Use the CMS configuration for blending and skill-based pacing.

 **Note:**

You can view the CC Elite Configurations page only if POM is installed in the CCElite mode.

## CC Elite Configurations page field descriptions

### CTI Configuration

| Field or Button              | Description                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>CTI Group Name</b>        | Displays the identifier for the CTI group.                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>CM IP Address</b>         | Displays the IP address of the system where you installed Avaya Aura® Communication Manager and configured the agents.<br><br> <b>Note:</b><br>In POM, you can configure only one Automated Call Distributor (ACD).                                                                                                                          |
| <b>CM Login</b>              | Displays the user name to log in to Avaya Aura® Communication Manager.                                                                                                                                                                                                                                                                                                                                                        |
| <b>AES IP Address</b>        | Displays the IP address of the system where you installed Application Enablement Services.                                                                                                                                                                                                                                                                                                                                    |
| <b>AES Secure Connection</b> | Specifies whether the connection to AES is secure.<br><br> <b>Note:</b><br>If the DNS is not configured, add the AES hostname entry in <code>/etc/hosts</code> file on each POM server.<br><br>For a successful agent login with <b>AES Secure connection</b> setting, ensure to import AES certificate using the Trusted Certificates page. |
| <b>CTI Group Role</b>        | Displays the group role as Active or Standby. You must ensure that the group you use is Active.                                                                                                                                                                                                                                                                                                                               |
| <b>Action</b>                | Use the <b>Delete</b> icon to delete the CTI details.                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Add CTI Detail</b>        | Use to add CTI details.                                                                                                                                                                                                                                                                                                                                                                                                       |

### CMS Configuration

| Field or Button              | Description                                                              |
|------------------------------|--------------------------------------------------------------------------|
| <b>Server IP Port</b>        | Displays the port number on which POM listens to the CMS server.         |
| <b>CMS Secure Connection</b> | Displays whether the connection to CMS is secure.                        |
| <b>Server Role</b>           | Displays as either Standby or Active. You can have only one active role. |

*Table continues...*

| Field or Button                           | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Agent Thrashing Interval (seconds)</b> | <p>Displays the thrashing intervals. Thrashing time prevents the blend agents getting thrashed between inbound and outbound. If an agent is released/ acquired then the agent cannot again be acquired/ released before the thrashing time as this can cause the agent moving between inbound and outbound too frequently causing his productivity to decline.</p> <p> <b>Note:</b></p> <p>The default value is 10. You can also set the value to 0.</p> |
| <b>Action</b>                             | Use the <b>Delete</b> icon to delete the CMS details. You can delete only the CMS servers that are in the Standby role.                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Add CMS Configuration</b>              | Use to add the CMS server configuration.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

### Filters

| Field or Button      | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Skillset Name</b> | <p>Use the drop-down list to select one of the following queries:</p> <ul style="list-style-type: none"> <li>• All</li> <li>• Contains</li> <li>• Starts with</li> </ul> <p>After selecting the query, specify the search string for skill in the text box.</p> <p>This parameter is used for pacing.</p>                                                                                                                                                       |
| <b>Skillset Type</b> | <p>Use the drop-down list to select one of the following queries:</p> <ul style="list-style-type: none"> <li>• All</li> <li>• Inbound</li> <li>• Outbound</li> <li>• Attribute</li> </ul> <p>This parameter is used for pacing.</p> <p> <b>Note:</b></p> <p>You can view the inbound skills that you add from CMS in Supervisor Dashboard under the Inbound Skills view.</p> |

*Table continues...*

| Field or Button       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Skills</b>         | Use the drop-down list to select one of the following queries: <ul style="list-style-type: none"> <li>• All</li> <li>• Blend Monitored</li> <li>• Blend Unmonitored</li> <li>• Pacing Monitored</li> <li>• Pacing Unmonitored</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Show</b>           | Displays the search results based on the search criteria you specify.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Refresh Skills</b> | Use this button to refresh the skills of the agents that are currently logged in. When you click this button, POM updates the skills of all the logged in agents with the latest skills from Avaya Aura® Communication Manager. POM updates the skills of all the logged in agents belonging to the organization of the logged in user. The agents are auto-assigned to a new campaign based on the updated skills after their current call gets over. Using this button might impact agent assignment to jobs based on the new skills. The Refresh Skills feature is available for use only in Avaya Experience Platform™ On-Prem mode. |

### Avaya Experience Platform™ On-Prem mapping

| Field or Button                          | Description                                                                                                                                                                                                                                                    |
|------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>CC Elite Skill Number</b>             | Displays a unique number mapped to the Avaya Experience Platform™ On-Prem skill number. This parameter is used for pacing.                                                                                                                                     |
| <b>POM Skill Name</b>                    | Displays a unique name given to CC Elite skill number. This parameter is used for pacing.                                                                                                                                                                      |
| <b>Skill Type</b>                        | Displays the skill type. This parameter is used for pacing.                                                                                                                                                                                                    |
| <b>Parameter to Monitor for Blending</b> | Displays the parameter to set for blending. You can choose any one from: <ul style="list-style-type: none"> <li>• Queue Length</li> <li>• Average Speed of Answer (ASA)</li> <li>• Expected Wait Time (EWT)</li> <li>• Percentage (%) Service Level</li> </ul> |

*Table continues...*

| Field or Button                | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>EWT levels</b>              | <p>Displays the EWT level if you choose <b>Expected Wait Time (EWT)</b> as the parameter for blending, or pacing. The <b>EWT Levels</b> can have any of the following values, or their combination:</p> <ul style="list-style-type: none"> <li>• Expected Wait Time(High)</li> <li>• Expected Wait Time(Medium)</li> <li>• Expected Wait Time(Low)</li> <li>• EWT med</li> <li>• EWT low</li> </ul> <p>POM uses this selection for releasing agents from outbound to inbound. If you select more than one EWT levels, POM considers the maximum value of the selected EWT levels and compares the value against the configured threshold value for agent blending.</p>                                                                                                                                                                             |
| <b>Agent Acquire Threshold</b> | <p>The value indicates that when traffic is below or equal to the specified value, the inbound skill is in good shape and if any blend agents were released, the system can acquire the agents. This parameter is used for blending.</p> <p>For example, if the agent acquire threshold value is 20 and the current Queue Length is less than or equal to 20 and any blend agents are released, the system can acquire the agents.</p> <p> <b>Note:</b></p> <p>The minimum agent acquire threshold can be set to 0 for Queue Length, Average Speed of Answer (ASA), and Expected Wait Time (EWT), and the minimum agent acquire threshold can be set to 100 for % Service Level.</p> <p>For EWT, set the value of <b>Agent Acquire Threshold</b> in seconds.</p> |
| <b>Agent Release Threshold</b> | <p>The value indicates that when the traffic is above or equal to the value the skill is in bad shape and if there are any blend agents, having the same skills, those agents must be released from outbound to enable them to take up inbound calls. This parameter is used for blending.</p> <p>For example, if the agent release threshold value is 30 and the current Queue Length is more than or equal to 30, the system can release the agents.</p> <p> <b>Note:</b></p> <p>The agent that is marked for release is released only when the current call of the agent is over. You can set the release threshold to 1.</p> <p>For EWT, set the value of <b>Agent Release Threshold</b> in seconds.</p>                                                    |

*Table continues...*

| Field or Button                         | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Agent Release Interval (seconds)</b> | The interval between successive release of agents. If a skill is in trouble, blender notifies agent manager to release a particular agent. However, it might take some time for agent to be actually unnailed as the agent might be attending the call. Also after the agent is unnailed and starts taking inbound calls it might take some time for the skill to appear in good shape. Hence if the release interval is not specified, blender might end up releasing all agents to inbound. This parameter is used for blending. |
| <b>Monitor for Blend</b>                | Displays whether the inbound skill is enabled for blending.                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Monitor for Pacing</b>               | Displays whether the inbound skill is enabled for pacing.<br><br>If you disable the skill for pacing, while the skill-based campaign is running, the changes do not take effect immediately on the running campaign. You must stop the skill-based campaign manually and change the skill being monitored from the campaign strategy.                                                                                                                                                                                              |
| <b>Zone Name</b>                        | Displays the zone blender name that monitors the selected skill.                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Action</b>                           | Use the <b>Delete</b> icon to delete the skill mapping details. You cannot delete the skill if the skill is associated with a campaign strategy.                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Add Skill</b>                        | Use to map CC Elite skill number to a user specified POM skill name. This parameter is used for pacing.                                                                                                                                                                                                                                                                                                                                                                                                                            |

## Add CTI Detail page field descriptions

Use this page to set up CTI details.

| Field or Button              | Description                                                                                                                                                                                 |
|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>CTI group name</b>        | Specify a unique identifier for the CTI group. CTI group name should not contain special characters @, ~, ` , ! , ' , ; , , , # , \ , \$ , % , & , ( , ) , { , } , ? , " , < , > or spaces. |
| <b>CM IP address</b>         | Specify the IP address of the system where you installed Avaya Aura® Communication Manager.                                                                                                 |
| <b>CM login</b>              | Specify the user name to log in to Avaya Aura® Communication Manager with prof18 privilege.                                                                                                 |
| <b>CM password</b>           | Specify the password to log in to Avaya Aura® Communication Manager.                                                                                                                        |
| <b>AES IP address</b>        | Specify the IP address of the system where you installed Application Enablement Services.                                                                                                   |
| <b>AES Secure Connection</b> | Specify whether the connection to AES is secure.                                                                                                                                            |
| <b>CTI group role</b>        | Specify the group role as Active or Standby. You must ensure that the group you use is Active.                                                                                              |
| <b>Save</b>                  | The button to save the changes.                                                                                                                                                             |



**\* Note:**

Proactive Outreach Manager supports only one active CTI profile at a time. If you want to interchange the communication manager, you need to change the active CTI profile in Proactive Outreach Manager and then logout and login the agents again.

## Edit CTI Detail page field descriptions

Use this page to edit the CTI details. You cannot edit the CTI group name after specifying it once.

| Field or Button              | Description                                                                                          |
|------------------------------|------------------------------------------------------------------------------------------------------|
| <b>CTI group name</b>        | Specify a unique identifier for the CTI group.                                                       |
| <b>CM IP address</b>         | Specify the IP address of the system where you installed Avaya Aura® Communication Manager.          |
| <b>CM login</b>              | Specify the user name to log in to Avaya Aura® Communication Manager. The default user name is init. |
| <b>CM password</b>           | Specify the password to log in to Avaya Aura® Communication Manager.                                 |
| <b>AES IP address</b>        | Specify the IP address of the system where you installed Application Enablement Services.            |
| <b>AES Secure Connection</b> | Specify whether the connection to AES is secure.                                                     |
| <b>CTI group role</b>        | Specify the group role as Active or Standby. You must ensure that the group you use is Active.       |
| <b>Save</b>                  | The button to save the changes.                                                                      |

## Add CMS Connectivity and Role page field descriptions

Use this page to set up the Call Management System (CMS) connectivity and define roles.

| Field or Button              | Description                                                                                                                                                                                                          |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Server IP port</b>        | Specify the port number on which POM listens to the CMS server.<br><br><p><b>* Note:</b></p> <p>Ensure that this port number is same as the port number configured on CMS server in the RT socket configuration.</p> |
| <b>CMS Secure Connection</b> | Specify whether the connection to CMS is secure.                                                                                                                                                                     |
| <b>Server role</b>           | The drop-down list to select the Active or Standby role. You can have only one active CMS server role and you cannot delete the active role.                                                                         |

*Table continues...*

| Field or Button                           | Description                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Agent Thrashing Interval (seconds)</b> | Specify the thrashing intervals. Thrashing time prevents the blend agents getting thrashed between inbound and outbound. If an agent is released/acquired then the agent cannot again be acquired/released before the thrashing time as this can cause the agent moving between inbound and outbound too frequently causing his productivity to decline.<br><br>* <b>Note:</b><br>The default value is 10. You can also set the value to 0. |
| <b>Save</b>                               | The button to save the changes.                                                                                                                                                                                                                                                                                                                                                                                                             |

## Edit CMS Connectivity and Role page field descriptions

Use this page to edit the CMS connectivity and define roles.

| Field or Button                           | Description                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Edit CMS Configuration</b>             |                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Server IP Port</b>                     | Specify the port number on which POM listens to the CMS server.<br><br>* <b>Note:</b><br>Ensure that this port number is same as the port number configured on CMS server in the RT socket configuration.                                                                                                                                                                                                                                   |
| <b>CMS Secure Connection</b>              | Specify whether the connection to CMS is secure.                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Server Role</b>                        | The drop-down list to select the Active or Standby role. You can have only one active CMS server role.                                                                                                                                                                                                                                                                                                                                      |
| <b>Agent Thrashing Interval (seconds)</b> | Specify the thrashing intervals. Thrashing time prevents the blend agents getting thrashed between inbound and outbound. If an agent is released/acquired then the agent cannot again be acquired/released before the thrashing time as this can cause the agent moving between inbound and outbound too frequently causing his productivity to decline.<br><br>* <b>Note:</b><br>The default value is 10. You can also set the value to 0. |
| <b>Save</b>                               | The button to save the changes.                                                                                                                                                                                                                                                                                                                                                                                                             |

## Create POM Skills page field descriptions

Use this page to create a skill in POM and map the skill with CC Elite skill number.

| Field or Button              | Description                                                                   |
|------------------------------|-------------------------------------------------------------------------------|
| <b>CC Elite Skill Number</b> | The skill number configured on Avaya Aura® Communication Manager for mapping. |

*Table continues...*

| Field or Button                          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>POM Skill Name</b>                    | <p>The unique skill name. You can also specify the attributes for the agents. Specify the attributes in the &lt;AttributeName.AttributeValue&gt; format. For example &lt;State.Arizon&gt;. For CC Elite configuration, only the following data types are supported:</p> <ul style="list-style-type: none"> <li>• INTEGER</li> <li>• LONG</li> <li>• SHORT</li> <li>• CHARACTER</li> <li>• BOOLEAN</li> <li>• STRING</li> </ul>                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Skill Type</b>                        | The list of skill types to specify the value as inbound or outbound.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Parameter to Monitor for Blending</b> | <p>The drop-down list to select one of the following parameters to set for blending:</p> <ul style="list-style-type: none"> <li>• Queue Length</li> <li>• Expected Wait Time</li> <li>• Avg Speed of Answer</li> <li>• % Answered within Service Levels</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>EWT levels</b>                        | <p>Use this multi select option to specify the EWT level if you select the <b>Parameter to Monitor for Blending</b> as <b>Expected Wait Time (EWT)</b>. You can specify either of the following values or their combination as the EWT levels:</p> <ul style="list-style-type: none"> <li>• Expected Wait Time (High)<br/>This is the default value.</li> <li>• Expected Wait Time (Medium)</li> <li>• Expected Wait Time (Low)</li> </ul> <p> <b>Note:</b></p> <p>If you upgrade POM from previous version to POM 3.0.4, and if EWT was used as a parameter for either blending or pacing, then after upgrade, the EWT value will be defaulted to Expected Wait Time (High) to ensure backward compatibility.</p> |

*Table continues...*

| Field or Button                         | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Agent Acquire Threshold</b>          | <p>This field is used to configure agent Acquire threshold. When inbound call traffic is below the Acquire threshold, the inbound skill is in good shape and if any blend agents were previously released to inbound, the system can acquire those agents for outbound. This parameter is used only for blending.</p> <p>For example, if the agent Acquire threshold value is 20 and the current Queue Length is less than 20 and any blend agents were previously released, the system can acquire the agents for outbound.</p>          |
| <b>Agent Release Threshold</b>          | <p>This field is used to configure Agent release threshold. When inbound call traffic is above the release threshold, the inbound skill is in bad shape and if there are any blend agents in outbound, those agents will be released from outbound to inbound. This parameter is used for blending.</p> <p>For example, if the agent release threshold value is 30 and the current Queue Length is more than 30, the system can release the agents.</p>                                                                                   |
| <b>Agent Release Interval (seconds)</b> | <p>The interval between successive release of agents. If a skill is in trouble, blender notifies agent manager to release a particular agent. However, it might take some time for agent to be actually unnailed as the agent might be attending the call. Also after the agent is unnailed and starts taking inbound calls it might take some time for the skill to appear in good shape. Hence if the release interval is not specified, blender might end up releasing all agents to inbound. This parameter is used for blending.</p> |
| <b>Monitor for Blend</b>                | Displays whether the inbound skill is enabled for blending.                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Monitor for Pacing</b>               | Displays whether the inbound skill is enabled for pacing.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Zone Name</b>                        | Displays the zone blender name that monitors the selected skill.                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Add</b>                              | The button to add more rows. You can insert up to 20 skills at one go.                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Save</b>                             | The button to save the changes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

## Edit POM Skills page field descriptions

Use this page to edit POM skills. You cannot edit the Avaya Experience Platform™ On-Prem skill number and POM skill name.

| Field or Button              | Description                                                                             |
|------------------------------|-----------------------------------------------------------------------------------------|
| <b>CC Elite Skill Number</b> | The unique Avaya Experience Platform™ On-Prem skill number. You cannot edit this field. |
| <b>POM Skill Name</b>        | The unique skill name. You cannot edit this field.                                      |
| <b>Skill Type</b>            | The drop-down list to specify the value as inbound or outbound.                         |

*Table continues...*

| Field or Button                          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Parameter to Monitor for Blending</b> | <p>The drop-down list to select one of the following parameters to set for blending:</p> <ul style="list-style-type: none"> <li>• Queue Length</li> <li>• Expected Wait Time</li> <li>• Avg Speed of Answer</li> <li>• % Answered within Service Levels</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>EWT levels</b>                        | <p>Use this multi select option to specify the EWT level if you select the <b>Parameter to Monitor for Blending</b> as <b>Expected Wait Time (EWT)</b>. You can specify either of the following values or their combination as the EWT levels:</p> <ul style="list-style-type: none"> <li>• Expected Wait Time (High)<br/>This is the default value.</li> <li>• Expected Wait Time (Medium)</li> <li>• Expected Wait Time (Low)</li> </ul> <p> <b>Note:</b></p> <p>If you upgrade POM from previous version to POM 3.0.4, and if EWT was used as a parameter for either blending or pacing, then after upgrade, the EWT value will be defaulted to Expected Wait Time (High) to ensure backward compatibility.</p> |
| <b>Agent Acquire Threshold</b>           | <p>The value indicates that when traffic is below the specified value, the inbound skill is in good shape and if any blend agents were released, the system can acquire the agents. This parameter is used for blending.</p> <p>For example, if the agent acquire threshold value is 20 and the current Queue Length is less than 20 and any blend agents are released, the system can acquire the agents.</p>                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Agent Release Threshold</b>           | <p>The value indicates that when the traffic is above the value the skill is in bad shape and if there are any blend agents, having the skill in question, those agents must be released from outbound to enable them to take up inbound calls. This parameter is used for blending.</p> <p>For example, if the agent release threshold value is 30 and the current Queue Length is more than 30, the system can release the agents.</p>                                                                                                                                                                                                                                                                                                                                                            |
| <b>Agent Release Interval (seconds)</b>  | <p>The interval between successive release of agents. If a skill is in trouble, blender notifies agent manager to release a particular agent. However, it might take some time for agent to be actually unnailed as the agent might be attending the call. Also after the agent is unnailed and starts taking inbound calls it might take some time for the skill to appear in good shape. Hence if the release interval is not specified, blender might end up releasing all agents to inbound. This parameter is used for blending.</p>                                                                                                                                                                                                                                                           |

*Table continues...*

| Field or Button           | Description                                                 |
|---------------------------|-------------------------------------------------------------|
| <b>Monitor for Blend</b>  | Displays whether the inbound skill is enabled for blending. |
| <b>Monitor for Pacing</b> | Displays whether the inbound skill is enabled for pacing.   |
| <b>Save</b>               | The button to save the changes.                             |

## Enabling TLS for AES, and SDK

### About this task

To establish a secured connection using TLS with AES, or SDK, update the *pim\_config* table.

### Procedure

To enable TLS1.0, TLS1.1, and TLS1.2 for SDK, run the query:

```
update pim_config set config_value='TLSv1,TLSv1.1,TLSv1.2' where
config_name='SupportedProtocols'
```

You can provide comma separated values as shown in the above query. To enable only one, for example TLS1.0, then set that value in the query and remove other two as follows:

```
update pim_config set config_value='TLSv1' where
config_name='SupportedProtocols'
```

---

## Context Store Configurations

### Overview

The Context Store Configurations page displays a list of Context Store servers. Depending on your role, you can add, update, or delete the server details. Campaign Manager pushes the attempt data on the configured Context Store server. In case of multiple server configurations, Campaign Manager pushes the data to the first configured server. If the first server is not reachable, then Campaign Manager pushes the data to the next configured server.

### Context Store Configurations page field descriptions

The Context Store Configurations page displays a list of Context Store servers. Depending on your role, you can add, update, or delete the server details.

| Name                   | Description                                                                              |
|------------------------|------------------------------------------------------------------------------------------|
| <b>Server Name</b>     | The name of the Context Store server.                                                    |
| <b>Network Address</b> | The IP address or hostname of the cluster on which the context store server is deployed. |

*Table continues...*

| Name                                                                                                                                                                                                 | Description                                                                                                                                                                                                                                                                                                                                                                               |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Action</b>                                                                                                                                                                                        | <p>The field to display the  Delete icon to delete a server entry.</p> <p>You cannot delete the context store server if:</p> <ul style="list-style-type: none"> <li>Any campaign is enabled to push the data to the context store server.</li> <li>This server is the only configured server.</li> </ul> |
| <p> <b>Note:</b></p> <p>Ensure that the Context Store server certificate has been added to the POM Trust Store.</p> |                                                                                                                                                                                                                                                                                                                                                                                           |

| Button     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Add</b> | <p>To add a context store server.</p> <p> <b>Note:</b></p> <p>There is a secure communication between the Context Store server and POM. So you must configure the Context Store server certificate to POM Trust store. For more information, see the <i>POM trusted certificate management</i> section in <i>Implementing Proactive Outreach Manager</i>. If the Oceana server is deployed in a Cluster, you must add certificate of all the nodes of Context Store server to the POM trust store.</p> |

## Add or Edit Context Store Server page field descriptions

| Name                                  | Description                                                                              |
|---------------------------------------|------------------------------------------------------------------------------------------|
| <b>Context Server Name</b>            | The name of the context store server.                                                    |
| <b>Context Server Network Address</b> | The IP address or hostname of the cluster on which the context store server is deployed. |

| Button        | Description                                                                          |
|---------------|--------------------------------------------------------------------------------------|
| <b>Save</b>   | To save the context store server details.                                            |
| <b>Cancel</b> | To discard the new server entry and return to the Context Store Configurations page. |

---

# Holiday configuration

## Overview

With this feature, POM restricts outbound dialing on specified days. The three types of holidays are country, state, and campaign. POM supports the MM/DD/YY date format to specify the holiday range.

There are a maximum of 20 holidays of each type (country, state, and campaign) that you can configure in POM.

The holiday configuration feature supports the following types of holiday restrictions:

- **Temporary Restriction:**

In temporary restriction, POM resumes outbound dialing after the restriction period ends.

For example, if January 1 is a holiday, POM attempts dialing after January 1 changes to January 2.

As the campaign level holiday is temporary, POM resumes dialing after the end of the temporary restriction criteria.

- **Permanent Restriction:**

In permanent restriction, POM stops dialing on the day specified as a holiday. POM does not attempt dialing again.

For example, if December 25 is a recurring holiday, POM does not dial after December 25.

When you set a campaign-level holiday, POM dials the contacts simultaneously. After dialing a few contacts, when POM identifies that a holiday is set for the campaign level, POM stops dialing.

## Adding a holiday

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Holiday Configurations**.
3. On the Holiday Configurations page, click **Add Holiday**.
4. On the Add Holiday page, add relevant information and click **Save**.

### Related links

[Add / Edit Holiday page field descriptions](#) on page 647

## Add / Edit Holiday page field descriptions

Use this page to add a holiday.



| Field or Button | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name            | <p>Use to specify the name of the holiday.</p> <p>You cannot edit this field after you save the holiday.</p> <p> <b>Note:</b></p> <ul style="list-style-type: none"><li>• You can use a maximum of 80 characters in this field.</li><li>• You cannot use the following characters:<ul style="list-style-type: none"><li>- White space</li><li>- {</li><li>- }</li><li>- (</li><li>- )</li><li>- @</li><li>- ~</li><li>- `</li><li>- !</li><li>- '</li><li>- ;</li><li>- ,</li><li>- #</li><li>- \$</li><li>- %</li><li>- &amp;</li><li>- ?</li><li>- "</li><li>- &lt;</li><li>- &gt;</li></ul></li></ul> |

Table continues...

| Field or Button     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Organization</b> | <p>Use to associate organizations with the holiday.</p> <p>To associate organizations, add the required organizations from the <b>Available Organizations</b> list to the <b>Selected Organizations</b> list.</p> <p>To do the following tasks, use the following actions:</p> <ul style="list-style-type: none"> <li>• To add an organization from the <b>Available Organizations</b> list to the <b>Selected Organizations</b> list, click <b>+</b>.</li> <li>• To remove an organization from the <b>Selected Organizations</b> list to the <b>Available Organizations</b> list, click <b>-</b>.</li> <li>• To add all organizations from the <b>Available Organizations</b> list to the <b>Selected Organizations</b> list, click <b>Add All</b>.</li> <li>• To remove all organizations from the <b>Selected Organizations</b> list to the <b>Available Organizations</b> list, click <b>Remove All</b>.</li> </ul> |
| <b>Level</b>        | <p>Use to select one of the following three levels at which the holiday is defined:</p> <ul style="list-style-type: none"> <li>• <b>Campaign</b></li> <li>• <b>State</b></li> <li>• <b>Country</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

You see different fields listed in the following three tables based on the **Level** you select.

POM displays the following fields if in **Level**, you select **Campaign**.

| Field or Button          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Campaign</b>          | <p>To associate campaigns, add the required campaigns from the <b>Available Campaigns</b> list to the <b>Selected Campaigns</b> list.</p> <p>The campaigns are available for selection based on the organizations you include in the <b>Selected Organizations</b> list. If you remove an organization from <b>Selected Organizations</b>, POM removes the campaigns that are associated with that organization.</p> <p>To do the following tasks, use the following actions:</p> <ul style="list-style-type: none"> <li>• To add a campaign from the <b>Available Campaigns</b> list to the <b>Selected Campaigns</b> list, click <b>+</b>.</li> <li>• To remove a campaign from the <b>Selected Campaigns</b> list to the <b>Available Campaigns</b> list, click <b>—</b>.</li> <li>• To add all campaigns from the <b>Available Campaigns</b> list to the <b>Selected Campaigns</b> list, click <b>Add All</b>.</li> <li>• To remove all campaigns from the <b>Selected Campaigns</b> list to the <b>Available Campaigns</b> list, click <b>Remove All</b>.</li> </ul> |
| <b>Start Time</b>        | Use to specify the start date and time of the holiday. Use the calendar wizard and the time-picker to select the date and the time. You can specify the time in 24-hour clock format.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>End Time</b>          | Use to specify the end date and time of the holiday. Use the calendar wizard and the time-picker to select the date and the time. You can specify the time in 24-hour clock format.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Yearly Recurrence</b> | Use to enable the holiday to occur yearly.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Enabled</b>           | Use to enable the holiday.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

POM displays the following fields if in **Level**, you select **State**.

| Field or Button | Description                                              |
|-----------------|----------------------------------------------------------|
| <b>Country</b>  | Use to select the country in which the state is located. |

*Table continues...*

| Field or Button          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>State</b>             | <p>To associate states, add the required states from the <b>Available States</b> list to the <b>Selected States</b> list.</p> <p>The states are available for selection, based on the country you select.</p> <p>To do the following tasks, use the following actions:</p> <ul style="list-style-type: none"> <li>• To add a state from the <b>Available States</b> list to the <b>Selected States</b> list, click .</li> <li>• To remove a state from the <b>Selected States</b> list to the <b>Available States</b> list, click .</li> <li>• To add all states from the <b>Available States</b> list to the <b>Selected Campaigns</b> list, click <b>Add All</b>.</li> <li>• To remove all states from the <b>Selected States</b> list to the <b>Available Campaigns</b> list, click <b>Remove All</b>.</li> </ul> |
| <b>Restriction Type</b>  | <p>Select one of the following restriction types:</p> <ul style="list-style-type: none"> <li>• To temporarily restrict the outbound dialing, select <b>Temporary Restriction</b>.</li> </ul> <p>POM resumes the outbound dialing after the restriction period.</p> <ul style="list-style-type: none"> <li>• To permanently restrict the outbound dialing based on the restriction completion code, select <b>Permanent Restriction</b>.</li> </ul> <p>For permanent restriction, you must also select the completion code in the <b>Restriction Completion Code</b> field.</p>                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Start Time</b>        | Use to specify the start date and time of the holiday. Use the calendar wizard and the time-picker to select the date and the time. You can specify the time in 24-hour clock format.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>End Time</b>          | Use to specify the end date and time of the holiday. Use the calendar wizard and the time-picker to select the date and the time. You can specify the time in 24-hour clock format.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Yearly Recurrence</b> | Use to enable the holiday to occur yearly.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Enabled</b>           | Use to enable the holiday.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

POM displays the following fields if in **Level**, you select **Country**.

| Field or Button                    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Country</b>                     | <p>To associate countries, add the required countries from the <b>Available Countries</b> list to the <b>Selected Countries</b> list.</p> <p>To do the following tasks, use the following actions:</p> <ul style="list-style-type: none"> <li>To add a country from the <b>Available Countries</b> list to the <b>Selected Countries</b> list, click <b>+</b>.</li> <li>To remove a country from the <b>Selected Countries</b> list to the <b>Available Countries</b> list, click <b>-</b>.</li> <li>To add all countries from the <b>Available Countries</b> list to the <b>Selected Countries</b> list, click <b>Add All</b>.</li> <li>To remove all countries from the <b>Selected Countries</b> to the <b>Available Countries</b>, click <b>Remove All</b>.</li> </ul> |
| <b>Restriction Type</b>            | <p>Select one of the following restriction types:</p> <ul style="list-style-type: none"> <li>To temporarily restrict the outbound dialing, select <b>Temporary Restriction</b>.</li> </ul> <p>POM resumes the outbound dialing after the restriction period.</p> <ul style="list-style-type: none"> <li>To permanently restrict the outbound dialing based on the restriction completion code, select <b>Permanent Restriction</b>.</li> </ul> <p>For permanent restriction, you must also select the completion code in the <b>Restriction Completion Code</b> field.</p>                                                                                                                                                                                                 |
| <b>Restriction Completion Code</b> | Use to select a restriction completion code to permanently restrict the outbound dialing.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Start Time</b>                  | Use to specify the start date and time of the holiday. Use the calendar wizard and the time-picker to select the date and the time. You can specify the time in 24-hour clock format.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>End Time</b>                    | Use to specify the end date and time of the holiday. Use the calendar wizard and the time-picker to select the date and the time. You can specify the time in 24-hour clock format.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Yearly Recurrence</b>           | Use to enable the holiday to occur yearly.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Enabled</b>                     | Use to enable the holiday.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

**Related links**

[Adding a holiday](#) on page 647

## Editing a holiday

### About this task

Use this procedure to change the properties of a holiday.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Holiday Configurations**.
3. On the Holiday Configurations page, do one of the following:
  - Under the **Name** column, click the holiday to change the required fields.
  - Under the **Name** column, point to the required holiday and click  and click **Edit** to change the required fields.
4. Click **Save**.

### Related links

[Add / Edit Holiday page field descriptions](#) on page 647

## Holiday Configurations page field descriptions

| Name                                                                                | Description                                                                                                                                                                                             |
|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|   | Use to refresh the page to display the latest data.                                                                                                                                                     |
|  | Use to select the columns to display as required.                                                                                                                                                       |
| <b>Id</b>                                                                           | Displays the Id of a holiday.                                                                                                                                                                           |
| <b>Name</b>                                                                         | Displays the name of a holiday.                                                                                                                                                                         |
| <b>Organization</b>                                                                 | Displays the name of the associated organization with a holiday.                                                                                                                                        |
| <b>Level</b>                                                                        | Displays the level at which of the following three levels the holiday is defined: <ul style="list-style-type: none"> <li>• <b>Campaign</b></li> <li>• <b>State</b></li> <li>• <b>Country</b></li> </ul> |
| <b>Selections</b>                                                                   | Displays information about the selected organizations, countries, and states for which a holiday is defined.                                                                                            |
| <b>Start Time</b>                                                                   | Displays the time when a holiday starts.                                                                                                                                                                |
| <b>End Time</b>                                                                     | Displays the time when a holiday ends.                                                                                                                                                                  |
| <b>Recurrence</b>                                                                   | Displays if the recurrence feature is enabled for a holiday.                                                                                                                                            |
| <b>Enabled</b>                                                                      | Displays if the holiday feature is enabled.                                                                                                                                                             |

*Table continues...*

| Name   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|--------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Action | <p>Use  to view more options such as <b>Edit</b> and <b>Delete</b>.</p> <p>POM displays  when you point the mouse over a contact list area.</p> <p>The following are the available actions:</p> <ul style="list-style-type: none"> <li>• Use <b>Edit</b> to change the properties of a holiday.</li> <li>• Use <b>Delete</b> to delete a holiday.</li> </ul> |

## SFTP Configuration

### Adding SFTP server

#### About this task

Use this procedure to configure an SFTP server that connects to the POM server.

#### Before you begin

Log on to POM.

#### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. In the content pane, click **Configurations > SFTP Configurations**.  
POM displays the SFTP Configurations page.
3. To add a new SFTP server, click **New SFTP Server**.  
POM displays the New SFTP Server page.
4. In the **Organization** field, select your organization.
5. In the **Name** field, type the name of the server.
6. In the **Host** field, type the FQDN of the server.
7. In the **Username** field, type a name to log on to the server.
8. In the **Password** field, type a password to log on to the server.
9. In the **Confirm Password** field, retype the password.
10. In the **Path** field, type the path of the valid directory on the SFTP server.
11. Click **Test Connection**.

## Editing SFTP server

### About this task

Use this procedure to edit the information about an SFTP server that connects to the POM server.

### Before you begin

Log on to POM.

Configure an SFTP server.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. In the content pane, click **Configurations > SFTP Configurations**.  
POM displays a list of servers on the SFTP Configurations page.
3. Point to a server and click **Edit**.  
POM displays the Edit SFTP Server page.
4. In the **Name** field, edit the name of the server.
5. In the **Host** field, edit the FQDN of the server.
6. In the **Username** field, edit the name to log on to the server.
7. In the **Password** field, edit the password to log on to the server.
8. In the **Confirm Password** field, retype the password.
9. In the **Path** field, edit the path of the valid directory on the SFTP server.
10. Click **Save**.

## Deleting SFTP server

### About this task

Use this procedure to delete an SFTP server that connects to the POM server.

### Before you begin

Log on to POM.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. In the content pane, click **Configurations > SFTP Configurations**.  
POM displays a list of servers on the SFTP Configurations page.
3. Point to a server and click **Delete**.



# Oceana Configuration

## Overview

The Oceana Server page displays a list of Oceana servers. Depending on your role, you can add, update, or delete the server details. Based on these server details, POM fetches the attribute definition of an agent from the Oceana server.

 **Note:**

- You can see the Oceana Server page only if you install POM in the Oceana mode.
- You must do the certificate exchange.

## Oceana Server page field descriptions

| Field or Button        | Description                                                                                 |
|------------------------|---------------------------------------------------------------------------------------------|
| <b>Server Name</b>     | The name of the Oceana server.                                                              |
| <b>Network Address</b> | The IP address or hostname of the cluster on which the Oceana outbound service is deployed. |
| <b>Action</b>          | The <b>Delete</b> icon to delete a server entry.                                            |
| <b>Add</b>             | The button to add an Oceana server.                                                         |

## Add Oceana Server Configuration field descriptions

The Add Oceana Server Configuration page allows you to add a new Oceana server in POM to fetch agent attribute definition from Oceana.

| Name                          | Description                                                                                                                                                                                                  |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Server Name</b>            | Specify the name of the Oceana server.                                                                                                                                                                       |
| <b>Server Network Address</b> | Specify the IP address or hostname of the cluster on which the Oceana Outbound service that is Oceana Outbound provider is deployed. You can also specify the hostname as the Oceana server network address. |

| Button        | Description                                                                 |
|---------------|-----------------------------------------------------------------------------|
| <b>Save</b>   | Click to save the Oceana server details.                                    |
| <b>Cancel</b> | Click to discard the new server entry and return to the Oceana Server page. |

# AACC Configurations

## Overview

Avaya Aura® Contact Center supports integration with Avaya Proactive Outreach Manager provides agents with a single desktop experience for inbound and outbound contacts. Integration with POM also provides blending and reporting of outbound activities. Contact Center agents must handle Proactive Outreach Manager contacts using Avaya Agent Desktop Avaya Aura® Contact Center does not support the handling of POM contacts with clients other than Agent Desktop.

POM provides a capability to dynamically predict the availability of a Contact Center agent and to pace outbound calls accordingly. This type of dialing can be used in contact centers where there is a requirement to efficiently contact large volumes of customers. A predictive dialer uses a combination of current information and historical statistics to determine how frequently an agent becomes available within Contact Center. Based on this, POM initiates calls in anticipation of agents becoming available to process the calls. Calls are connected to an agent only when a customer answers a call.

## AACC configuration page field descriptions

Use this page to configure the AACC configuration parameters. For more information about the following AACC configuration parameters, see *Avaya Aura® Contact Center* documentation on the Avaya support site at <http://support.avaya.com>.

 **Note:**

You can view the AACC configuration page only if you installed POM in AACC mode.

| Field                              | Description                                                                                                    |
|------------------------------------|----------------------------------------------------------------------------------------------------------------|
| <b>AACC web service IP address</b> | Specify the IP address of the AACC Web service. The default address is 127.0.0.1.                              |
| <b>AACC web service user name</b>  | Specify the AACC Web service username. The default username is webadmin.                                       |
| <b>AACC web service password</b>   | Specify the AACC Web service password.                                                                         |
| <b>AACC Multicast IP address</b>   | Specify the AACC multicast IP address.                                                                         |
| <b>AACC Hostname</b>               | Specify a valid AACC hostname ensuring that the hostname is resolved by <code>hosts</code> file or DNS.        |
| <b>AACC Secure Connection</b>      | Specify if you want a secure connection to AACC using the https protocol. The check box is cleared by default. |

For more information on running agent-based campaigns using AACC, see *Avaya Aura® Contact Center – Proactive Outreach Manager Integration*.

---

# External selection configurations

## Overview

POM supports the External Selection feature. With this feature, external applications can pair agents and contacts for POM agent-based campaigns.

With this feature, POM exposes the interface and supporting classes. External applications select an agent for a contact or a contact for an agent through the interface and supporting classes. External applications can also apply the logic to select the agent-contact pair.

Connection management to the external system is a part of the external selection class and is implemented by a third party.

POM must provide the configuration data of the external system while initializing the external selection class. POM must also provide KeyStore or certificate path to the external selection class to secure the connection to the external system.

External selection interface must have methods to send a request and receive a response, overridden by the external selection class to implement the logic of sending a request and a receiving response. External selection class is deployed in the POM custom folder.

## Configuring an external system on POM

### About this task

Use this procedure to whitelist external systems for POM.

### Before you begin

Ensure that the external system is active.

### Procedure

1. Log on to the Avaya Experience Portal web console as the administrator.
2. In the navigation pane, click **Proactive Outreach > Manager**.
3. In the content pane, click **Configurations > External Selection Configurations**.

POM displays the External Selection Configurations page.

4. Click **Add**.

POM displays the External System Configuration dialog box.

5. In the **IP** field, type the server IP address of the external system.
6. In the **Hostname** field, type the server Fully Qualified Domain Name (FQDN) of the external system.
7. Click **Save**.

## Configuring external selection parameters

### About this task

Use this procedure to configure an external system on POM and load class files from the external system to POM.

### Procedure

1. Log on to the Avaya Experience Portal web console as the administrator.
2. In the navigation pane, click **Proactive Outreach > Manager**.
3. On the **Configurations** menu, click **External Selection Configurations**.
4. In the **Server Port** field, type the port number to which the external system connects.
5. In the **Failsafe Timer (msec)** field, type any value between 20 and 500.
6. In the **Maximum consecutive response timeout** field, type any value between 3 and 100.
7. In the **Next attempt interval after maximum timeout (sec)** field, type any value between 30 to 300.
8. In the **Heartbeat interval (sec)** field, type any value between 15 to 600.
9. In the **External selection class** field, type the name of the external selection class file.
10. Select the **Enable external selection for all campaigns** check box.
11. Click **Save**.

## External selection configurations page field descriptions

Use this page to view the field descriptions that are used for the external selection configurations.

### External system configurations parameters

| Field or Button | Description                                                                      |
|-----------------|----------------------------------------------------------------------------------|
| <b>IP</b>       | The IP address of an external system that you select for whitelisting.           |
| <b>Hostname</b> | The FQDN of the external system that is on the network to which you connect POM. |
| <b>Action</b>   | To edit or delete the IP address and the FQDN.                                   |

### External selection configuration parameters

| Field or Button    | Description                                                                               |
|--------------------|-------------------------------------------------------------------------------------------|
| <b>Server Port</b> | The server port to which the external system connects.<br><br>The default port is 11,000. |

*Table continues...*

| Field or Button                                          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Failsafe Timer (msec)</b>                             | <p>The time for which POM waits for the external selection system to respond to the selection request sent by POM.</p> <p>The default minimum failsafe time is 20 milliseconds.</p> <p>The default maximum failsafe time is 500 milliseconds.</p> <p>The failsafe time configured on the system by default is 100 milliseconds.</p>                                                                                                                                                                                                                                                                           |
| <b>Maximum consecutive response timeout</b>              | <p>The maximum number of consecutive attempts after which POM stops sending requests to the external server.</p> <p>If the external system does not respond for <math>x</math> consecutive (<math>x</math> is configurable) requests from POM within the failsafe time, POM does not send subsequent requests to the external selection class and continues with the POM selection logic.</p> <p>POM tries to send the selection request after <math>y</math> seconds (<math>y</math> is configurable).</p> <p>The default minimum timeout is 3 seconds.</p> <p>The default maximum timeout is 5 seconds.</p> |
| <b>Next attempt interval after maximum timeout (sec)</b> | <p>The duration between the last attempt in which POM stops sending requests to the external server and the next attempt in which POM starts sending requests to the external server.</p>                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Heartbeat interval (sec)</b>                          | <p>The Heartbeat interval in seconds.</p> <p>The default minimum interval is 15 seconds.</p> <p>The default maximum interval is 600 seconds.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>External selection class</b>                          | <p>The class path of the external selection class that resides on the external selection server.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Enable external selection for all campaigns</b>       | <p>By default, this flag is disabled on POM.</p> <p>If you enable this flag, external selection becomes applicable for all preview/predictive and progressive campaigns. However, if you disable this flag, external selection becomes applicable after you enable the campaign level flag.</p>                                                                                                                                                                                                                                                                                                               |
| <b>Add</b>                                               | <p>Use this button to configure the details of an external system, such as FQDN and IP address.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Edit</b>                                              | <p>Use this button to edit the existing details of an external system, such as FQDN and IP address.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

*Table continues...*

| Field or Button | Description                                                                       |
|-----------------|-----------------------------------------------------------------------------------|
| <b>Delete</b>   | Use this button to delete the configured details of an external system.           |
| <b>Save</b>     | Use this button to save the parameters that you configure for external selection. |
| <b>Reset</b>    | Use this button to reset parameters to the last saved values.                     |

## External system configuration page field descriptions

This page defines the field descriptions for the external system configuration.

| Field or Button | Description                                                             |
|-----------------|-------------------------------------------------------------------------|
| <b>IP</b>       | The IP address of an external system that you select for white listing. |
| <b>Hostname</b> | The FQDN of the external system that connects to the POM server.        |

---

## Adding Common Service Platform server details to POM for authentication

### About this task

Use this procedure to configure Common Server Platform server details on POM user interface for authentication.

### Procedure

1. In the navigation pane, click **Proactive Outreach > Manager**.
2. On the **Configurations** menu, click **Authentication Server Configuration**.  
POM lists the authentication that is used for token validation of Avaya Workspaces for Elite.
3. Click **Add** to add an authentication server.  
You can add only one server.
4. On the **Add Authentication Server**, type the following:
  - **Server Name**
  - **Server Address**
  - **Server Port**
5. Click **Save** to save the server details for authentication.

The Authentication server gets listed on the Authentication server page.

## Related links

[Add Authentication Server field descriptions](#) on page 662

## Add Authentication Server field descriptions

| Name                   | Description                                                                             |
|------------------------|-----------------------------------------------------------------------------------------|
| <b>Server Name</b>     | The name of the Authentication server.                                                  |
| <b>Network Address</b> | The IP address or hostname of the Authentication service.                               |
| <b>Port</b>            | The port number of the Authentication server.                                           |
| <b>Action</b>          | The actions you can perform. Use the Delete button to delete the Authentication server. |

## Related links

[Adding Common Service Platform server details to POM for authentication](#) on page 661

# Chapter 10: POM shipped applications

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## POM shipped applications overview

POM provides shipped applications that you can use for different types of campaigns. These applications help you to setup the notifications you want to play when the call is answered. You must define and configure the applications when you install POM. For more information about configuring the applications, see *Implementing Avaya Proactive Outreach Manager*.

After you configure these applications based on your requirement, you can use the applications while creating a campaign strategy for specific campaigns.

The following are the shipped applications:

- AvayaPOMAgent
- AvayaPOMAnnouncement
- AvayaPOMEmail
- AvayaPOMNotifier
- AvayaPOMSMS
- Nailer
- PomDriverApp

 **Note:**

All application names are case-sensitive. POM 3.0.3 and above do not support external load balancers for Nailer and AvayaPomDriver applications.

### AvayaPOMAgent

Use AvayaPOMAgent to transfer the call after playing a recorded welcome message, followed by a simple notification text (TTS). The transfer is blind and the application exits after transferring the call. The notification text is optional for this application. Configure this application as a POM:Application type in EPM with name as AvayaPOMAgent. The welcome message is optional. You can specify the welcome message using Configurable Application Variables (CAV) while configuring the application in EPM.

 **Note:**

AvayaPOMAgent application works only for the agent-based campaigns.

Avaya recommends that you provide a welcome message as there can be some delay in retrieving the notification text in load scenarios. This delay might lead to a silence before the system plays the notification text. A welcome message prevents this silence. The system retrieves



the notification text using an internal web service call. If an error occurs in retrieving this text, the application tries the secondary web service URL and then directly jumps to transfer.

You can use this application only with a POM campaign and does not work as a standalone application. A special node for this application AvayaAgent is provided in the campaign strategy under *Applications*. Specify the ID of the text and the number to transfer to VDN in the properties for the AvayaAgent node. You can provide tel:AvayaPOMAgent as the destination. If you do so, then the calls are transferred to a POM agent nailed to the respective campaign. Ensure that you configure the Avaya Experience Portal system and Campaign Manager properly for transfers before using this application. You must configure this application in EPM with name as AvayaPOMAgent and no other name works.

You can use two optional CAVs, namely, DNC Digit and DNC Result Prompt for enabling the opt-out mechanism.

The DNC Digit is a number and if the contact presses this number (DTMF digit) during a call, POM adds the called number as stored in the contact list to the POM DNC list, without the dialing prefix, if any. You can mention any number between 0 and 9.

The DNC Result prompt is a wav file that POM plays out to the contact on successful addition to the DNC list by pressing the DNC Digit while on call.

### **AvayaPOMAnnouncement**

Use AvayaPOMAnnouncement for announcement type of campaigns. You can use the application to play pre-recorded prompts. You must upload the pre-recorded prompts (wav files) using CAV while configuring this application in EPM. Configure this application as a POM:Application type in EPM and with name as AvayaPOMAnnouncement. On the CAV page for this application, you can upload prompts for maximum three different languages. Each language has four prompts. The system plays the four prompts in a sequence one after another. Select appropriate language from the list of available language codes and upload respective language prompts for that language. Do not select multiple language codes.

The first four prompts on the page are default prompts. These set of prompts are played in a sequence one after another if the contact language does not match with any of the selected languages. The first default prompt (Default Prompt 1) is mandatory, rest all prompts are optional. You can use this application only with a POM campaign and does not work as a standalone application. Add a custom application node for this application in the campaign strategy. Specify AvayaPOMAnnouncement from the drop-down list available for the Application property of the custom node.

You can use a few optional CAVs, namely, DNC Digit and DNC Result Prompt for enabling the opt-out mechanism.

The DNC Digit is a number and if the contact presses this number (DTMF digit) during a call, POM adds the called number as stored in the contact list to the POM DNC list, without the dialing prefix, if any. You can mention any number between 0 and 9.

The DNC Result prompt is a wav file that POM plays out to the contact on successful addition to the DNC list by pressing the DNC Digit while on call. The DNC Result Prompt is available per language.

### **AvayaPOMEmail**

Use AvayaPOMEmail to send an email message. Configure this application as an email type in EPM with name as AvayaPOMEmail. AvayaPOMEmail does not work as a standalone application.

A special node for this application AvayaNotify is provided in the campaign strategy under *Applications*. Specify the ID of the text in the TextId property of the AvayaNotify node. You must configure the application in EPM.

### AvayaPOMNotifier

Use AvayaPOMNotifier to play a recorded welcome message followed by a simple notification text (TTS). Configure this application as a POM:Application type in EPM with name as AvayaPOMNotifier. The welcome message is optional. You can provide the welcome message using CAV while configuring this application in EPM. The notification text is retrieved using an internal web service call. If an error occurs in retrieving this text, the application tries the secondary web service URL and if the problem still exists, an error message is played. You can customize the error message using another CAV provided for this application. Avaya recommends that you provide a welcome message as there can be some delay in retrieving the notification text in load scenarios. This delay might lead to a silence before the notification text is played. A welcome message prevents this silence. You can use this application only with a POM campaign and does not work as a standalone application. A special node for this application AvayaNotify is provided in the campaign strategy under *Applications*. Specify the ID of the text in the TextId property of the AvayaNotify node. This application must be configured in EPM with name as AvayaPOMNotifier and no other name works.

You can use two optional CAVs, namely, DNC Digit and DNC Result Prompt for enabling the opt-out mechanism.

The DNC Digit is a number and if the contact presses this number (DTMF digit) during a call, POM adds the called number as stored in the contact list to the POM DNC list, without the dialing prefix, if any. You can mention any number between 0 and 9.

The DNC Result prompt is a wav file that POM plays out to the contact on successful addition to the DNC list by pressing the DNC Digit while on call.

### AvayaPOMSMS

Use AvayaPOMSMS to send an SMS. Configure this application as a SMS type in EPM with name as AvayaPOMSMS. AvayaPOMSMS does not work as a standalone application. A special node for this application AvayaNotify is provided in the campaign strategy under *Applications*. Specify the ID of the text in the TextId property of the AvayaNotify node. You must configure this application in EPM.

#### **Note:**

If AvayaPOMSMS encounters the mismatch of phone numbers across the send SMS and its corresponding reply or delivery receipt / notifications, then the further processing stops, as the contact attempt record doesn't match with the POM database. Such a situation occurs when POM sends SMS to the phone number without using the country code but the reply or delivery receipt / notification comes back from the provider prefixed with the country code. In such scenario, you must provide the possible phone prefix added by the operator or the SMS prefix added by POM as a comma separated list in **SMS Dialing Code to Ignore** CAV.

### Nailer

Use Nailer application to manage the agent nailing session. Configure this application as a POM: Nailer type in EPM with name as Nailer. In order to use the Nailer application for campaigns, specify the Nailer application in the campaign strategy. In order for the Agent Manager to work correctly, you must configure at least one Nailer and one Driver application in the EPM. POM

maintains one nailing session for one agent. If you want to play TTS prompts in the hold application, you must configure a TTS in the Nailer application.

**\* Note:**

You must configure minimum one nailer application and one driver application on a POM system for every zone. You must configure at least one application with the name “Nailer” and “PomDriverApp” respectively as with POM: Nailer and POM: Driver type. All application names except PomDriverApp and Nailer are case-sensitive.

## **PomDriverApp**

This is a system application of POM which manages execution of calls for a POM campaign. The application launches the calls and then connects the called party to an appropriate application you specify in the campaign strategy based on the outcome of the call. Configure this application as a POM: Driver type in EPM with name as PomDriverApp. Since all POM applications are child nodes of this application, you need to specify resources like TTS, required by the children applications in the configuration of PomDriverApp in the EPM. You can configure multiple driver applications with same URL, but with different names and resources. Choose right resources required by the campaign by selecting the driver application in the Driver Application property of the Call node in the campaign strategy.

When POM places a successful call, a timer called the 'Start of voice timeout' is started. The default value of this timer is 2000 milliseconds. If POM does not receive the 'start of voice' event within this duration, POM initiates Answer Human treatment as specified in the campaign strategy. If POM receives the 'start of voice' event within this duration, POM starts another timer called 'live voice timeout'. The default value of this timer is 1800 milliseconds. If POM receives the 'live voice' event within this duration, then it initiates Answer Human treatment immediately as specified in campaign strategy. If POM does not receive the 'live voice' event within this duration, it initiates Answer Human treatment as specified in campaign strategy after the timeout.

If POM detects live voice event after the Answer Human treatment starts, POM updates the completion code (Answer\_Human) in the database and continues with the Answer Human treatment. If POM receives 'Answer Machine' event after the Answer Human treatment starts, the driver application waits for the end of machine greeting. On receiving the 'end of message' event, it terminates the Answer Human treatment and initiates Answer Machine treatment as specified in campaign strategy.

If you disable the compliance timers, then POM driver application waits for result of call classification till CCA timeout configured on the Campaign Creation page before starting any call treatment. If POM receives result of call classification within this duration, then it initiates 'Answer Human' or 'Call Answered' treatment as specified in campaign strategy. If POM does not receive the result of call classification within this duration, then it initiates 'Answer Human' or 'Call Answered' treatment as specified in campaign strategy after the timeout.

**\* Note:**

If the Answer Human treatment is application type then the specified application is played on the customer call. If the answer human treatment is agent type then POM driver application informs the agent manager to connect the customer call to the best available agent. If no agent is available to connect with the call, then the agent manager informs the driver application to play the nuisance application configured in the campaign strategy.

## Change AvayaPOMAgent Configurable Application Variables page field descriptions

Use this page to change the values of the configurable application variables of the **AvayaPOMAgent** application deployed on Avaya Experience Portal.

| Name                                   | Description                                                                       |
|----------------------------------------|-----------------------------------------------------------------------------------|
| <b>DNC Digit [0,1,2,3,4,5,6,7,8,9]</b> | The digits to be pressed by the customer to place the customer in a DNC list.     |
| <b>DNC Result Prompt</b>               | The prompt to be played after the customer is successfully added to the DNC list. |
| <b>Welcome Message File</b>            | The first prompt played to the customer when the call starts.                     |

## Change AvayaPOMAnnouncement Configurable Application Variables page field descriptions

Use this page to change the values of the configurable application variables of the **AvayaPOMAnnouncement** application deployed on Avaya Experience Portal. You can configure prompts for three languages. If you do not configure prompts for any language, then the default prompts are played sequentially.

| Name                                   | Description                                                                                                                                                                                              |
|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>DNC Digit [0,1,2,3,4,5,6,7,8,9]</b> | The digits to be pressed by the customer to place the customer in a DNC list.                                                                                                                            |
| <b>Default Prompt 1</b>                | To upload the first default prompt that POM plays if the contact language does not match with any of the selected languages. Upload the prompt in a <code>.wav</code> file. This is a mandatory prompt.  |
| <b>Default Prompt 2</b>                | To upload the second default prompt that POM plays if the contact language does not match with any of the selected languages. Upload the prompt in a <code>.wav</code> file. This is an optional prompt. |
| <b>Default Prompt 3</b>                | To upload the third default prompt that POM plays if the contact language does not match with any of the selected languages. Upload the prompt in a <code>.wav</code> file. This is an optional prompt.  |
| <b>Default Prompt 4</b>                | To upload the fourth default prompt that POM plays if the contact language does not match with any of the selected languages. Upload the prompt in a <code>.wav</code> file. This is an optional prompt. |
| <b>Default DNC Result Prompt</b>       | The prompt to be played after the customer is successfully added to the DNC list.                                                                                                                        |

*Table continues...*

| Name                                  | Description                                                                                                                       |
|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| <b>Language 1</b>                     | The first language in which the prompts will be played.                                                                           |
| <b>Language 1 - Prompt 1</b>          | To upload the first prompt that POM plays for the selected language. Upload the prompt in a .wav file.                            |
| <b>Language 1 - Prompt 2</b>          | To upload the second prompt that POM plays for the selected language. Upload the prompt in a .wav file.                           |
| <b>Language 1 - Prompt 3</b>          | To upload the third prompt that POM plays for the selected language. Upload the prompt in a .wav file.                            |
| <b>Language 1 - Prompt 4</b>          | To upload the fourth prompt that POM plays for the selected language. Upload the prompt in a .wav file.                           |
| <b>Language 1 - DNC Result Prompt</b> | The prompt to be played after the customer is successfully added to the DNC list. This prompt is played in the selected language. |
| <b>Language 2</b>                     | The second language in which the prompts will be played.                                                                          |
| <b>Language 2 - Prompt 1</b>          | To upload the first prompt that POM plays for the selected language. Upload the prompt in a .wav file.                            |
| <b>Language 2 - Prompt 2</b>          | To upload the second prompt that POM plays for the selected language. Upload the prompt in a .wav file.                           |
| <b>Language 2 - Prompt 3</b>          | To upload the third prompt that POM plays for the selected language. Upload the prompt in a .wav file.                            |
| <b>Language 2 - Prompt 4</b>          | To upload the fourth prompt that POM plays for the selected language. Upload the prompt in a .wav file.                           |
| <b>Language 2 - DNC Result Prompt</b> | The prompt to be played after the customer is successfully added to the DNC list. This prompt is played in the selected language. |
| <b>Language 3</b>                     | The third language in which the prompts will be played.                                                                           |
| <b>Language 3 - Prompt 1</b>          | To upload the first prompt that POM plays for the selected language. Upload the prompt in a .wav file.                            |
| <b>Language 3 - Prompt 2</b>          | To upload the second prompt that POM plays for the selected language. Upload the prompt in a .wav file.                           |

*Table continues...*

| Name                                  | Description                                                                                                                       |
|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| <b>Language 3 - Prompt 3</b>          | To upload the third prompt that POM plays for the selected language. Upload the prompt in a .wav file.                            |
| <b>Language 3 - Prompt 4</b>          | To upload the fourth prompt that POM plays for the selected language. Upload the prompt in a .wav file.                           |
| <b>Language 3 - DNC Result Prompt</b> | The prompt to be played after the customer is successfully added to the DNC list. This prompt is played in the selected language. |

## Change AvayaPOMEmail Configurable Applications page field descriptions

Use this page to change the values of the configurable application variables of the **AvayaPOMEmail** application deployed on Avaya Experience Portal.

| Name                                  | Description                                                                                                                                                                                                                                                                                                                                                                                                |
|---------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Body Attribute Name</b>            | The contact list attribute in which the email body of the customer reply will be stored with a limit of 3000 characters. You must use this for 2 - way email and only if you want to store the body of the email reply.                                                                                                                                                                                    |
| <b>Campaign Name</b>                  | Name of the campaign in which the application is used.                                                                                                                                                                                                                                                                                                                                                     |
| <b>Completion Code</b>                | The completion code to be updated on receipt of email reply.                                                                                                                                                                                                                                                                                                                                               |
| <b>Subject Attribute Name</b>         | The contact list attribute in which the subject of the customer reply will be stored with a limit of 3000 characters. You must use this for 2 - way email and only if you want to store the subject of the reply. If you configure this CAV with a valid contact list attribute, then only the contact list gets updated. Else, only the completion code provided in the CAV is updated for 2 - way email. |
| <b>Web Service IP Address or FQDN</b> | The IP address or FQDN of server where <b>VP_POMSysAPIService</b> is hosted. This is a mandatory field.                                                                                                                                                                                                                                                                                                    |

## Change AvayaPOMNotifier Configurable Application Variables page field descriptions

Use this page to change the values of the configurable application variables of the **AvayaPOMNotifier** application deployed on Avaya Experience Portal.

| Name                                   | Description                                                                                                                  |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------|
| <b>DNC Digit [0,1,2,3,4,5,6,7,8,9]</b> | The digits to be pressed by the customer to place the customer in a DNC list.                                                |
| <b>DNC Result Prompt</b>               | The prompt to be played after the customer is successfully added to the DNC list.                                            |
| <b>Error Message Prompt File</b>       | The file containing the error message to be played in case <b>AvayaPOMNotifier</b> is unable to fetch the notification text. |
| <b>Welcome Message Prompt File</b>     | An optional prompt which is played to the customer before playing the notification text.                                     |

## Change AvayaPOMSMS Configurable Applications page field descriptions

Use this page to change the values of the configurable application variables of the **AvayaPOMSMS** application deployed on Avaya Experience Portal.

| Name                                  | Description                                                                                                                                                                                                                                                                         |
|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Attribute Name</b>                 | The contact list attribute in which the SMS reply will be stored. You must use this for 2 - way SMS and only if you want to store the SMS reply.                                                                                                                                    |
| <b>Campaign Name</b>                  | Name of the campaign in which the application is used.                                                                                                                                                                                                                              |
| <b>Completion Code</b>                | The completion code to be updated on receipt of SMS reply.                                                                                                                                                                                                                          |
| <b>SMS Dialing Code to Ignore</b>     | The possible phone prefix added by the operator or the SMS prefix added by POM should be provided as a comma separated list in <b>SMS Dialing Code to Ignore</b> CAV. This will be used for address matching while processing SMS reply, or sent notification, or delivery receipt. |
| <b>Web Service IP Address or FQDN</b> | The IP address or FQDN of server where <b>VP_POMSysAPIService</b> is hosted. This is a mandatory field.                                                                                                                                                                             |



# Chapter 11: Compliance

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## Compliance considerations

POM is an application that enables customers to automate their outbound contact handling by utilizing sophisticated strategies across multiple channels, including Voice, Email, and SMS. POM's industry leading Call Classification Analysis and associated Answer Machine Detection capability helps to ensure the greatest level of productivity and also addresses the regulatory requirements.

To contact customers, POM only utilizes contact data that is made available by external sources.

For example, data that is:

- Uploaded or imported within contact lists.
- Provided by external applications or data sources through Application Programming Interfaces.
- Provided by agents when interacting with the solution.
- Provided by automated (self-service) applications.

POM off the shelf does not generate any contact information by itself, either randomly or sequentially.

POM provides the following features to help customers achieve regulatory compliance related to the rules. It is the customer's responsibility to use POM in compliance with all the applicable laws or regulations.



| Feature            | High level requirement                                                                                                                                                                                                                                                                                                                                                | Feature support offered by POM                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Nuisance Call Rate | <p>The Nuisance call rate shall be no more than 3% of live calls per campaign (i.e. across call centers), or per call center (i.e. across campaigns) over a 24 hour period. The abandoned call rate must include a reasoned estimate of Answer Machine Detection (AMD) false positives and may exclude a reasoned estimate of calls abandoned to answer machines.</p> | <p>POM supports pacing calls to manage the desired Nuisance call level by utilizing the “Cruise Control” algorithm.</p> <p>POM Cruise Control algorithm, when using predictive dialing, allows for maintaining the service level such that the number of abandoned, or nuisance calls is within the limit administered for a given campaign.</p> <p>Compliance across multiple systems or across a call center has to be ensured by the call center management, or customer.</p> <p>POM needs be configured to reset the cruise control algorithm every midnight (12:00 AM). In such case, POM resets the number of call hits and number of abandoned, or nuisance calls so that the algorithm maintains the number of nuisance calls to be within limit of that particular day. Without such reset, the algorithm would manage the nuisance for the life time of the campaign, rather than a given day. POM provides an option to configure an estimate for the false positive rate of the Answer Machine Detection (AMD) algorithm, and considers the same in the calculation of nuisance rate. The system default is 3% which must be changed in the implementation process to reflect the reasoned estimate determined for the particular customer environment.</p> <p>POM raises an alarm POMCD003, when the nuisance rate exceeds the configured value for a campaign.</p> |

*Table continues...*

| Feature                                  | High level requirement                                                                                                                                                                                                                                                                                                                | Feature support offered by POM                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                          |                                                                                                                                                                                                                                                                                                                                       | <p>If the nuisance rate exceeds the configured value for the day, then POM generates an alarm POMCD918. POM checks and calculates the nuisance rate at the interval of every 20 seconds. The campaign administrator needs to take an appropriate action upon receiving alarms.</p> <p> <b>Note:</b></p> <p>The use of the Expert Calling Algorithm is not recommended to manage such a compliance requirement. The Expert Calling Algorithm does not support an automatic management against a given service level or nuisance rate. Supervisors are to monitor nuisance levels manually and intervene when necessary.</p> |
| Information Message - Timing and Content | <p>In the event of an abandoned call (other than an AMD false positive), a very brief recorded information message must start playing no later than two seconds after the telephone has been picked up or within two seconds of the call being answered. The information message must contain at least the following information:</p> | <p>POM can be configured to play an informational message when an agent cannot be made available either within 2 seconds after the telephone off-hook event, or within 2 seconds after the live voice energy is detected (contact begins to speak).</p> <p>Starting with POM 3.0.4, a background AMD detection capability is introduced. It supports POM to continue the classification of a call for potentially being an answer machine after the call connects to an agent (in order to comply with patching the call to an agent within 2 seconds), but the detection of an answer machine is incomplete.</p>                                                                                             |

*Table continues...*

| Feature          | High level requirement                                                                                                                                                                                                                                                                                                                                              | Feature support offered by POM                                                                                                                                                                                                                                                                                                                                                    |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                  | <ul style="list-style-type: none"> <li>The identity of the company on whose behalf the call was made (which will not necessarily be the same company that is making the call);</li> </ul>                                                                                                                                                                           | <p>The contact center management, or customer must address this requirement.</p> <p>The message to be played has to be provided by the contact center manager, or customer.</p>                                                                                                                                                                                                   |
|                  | <ul style="list-style-type: none"> <li>Details of a Special Services (080 – no charge) or a Special Services basic rate (0845 only) or a Geographic Number (01/02) or a UK wide Number at a geographic rate (03) number the called person can contact so they have the possibility of declining to receive further marketing calls from the company; and</li> </ul> | <p>The contact center management, or customer must address this requirement.</p> <p>The contact center manager, or customer must provide the message to be played.</p>                                                                                                                                                                                                            |
|                  | <ul style="list-style-type: none"> <li>includes no marketing content and is not used as an opportunity to market to the called person.</li> </ul>                                                                                                                                                                                                                   | <p>The contact center management, or customer must address this requirement.</p> <p>The contact center manager, or customer must provide the message to be played.</p>                                                                                                                                                                                                            |
| Unanswered Calls | Calls which are not answered must ring for a minimum of 15 seconds before being terminated.                                                                                                                                                                                                                                                                         | <p>POM allows configuring the timeout parameter for outbound calls within the campaign strategy associated with the campaign.</p> <p>The default value of this parameter is 45 seconds. The administrator can configure the timeout parameter as desired.</p> <p>POM shows a warning in the form of tooltip if a value to less than 15 seconds is attempted to be configured.</p> |

*Table continues...*

| Feature        | High level requirement                                                                                                                                                                                                                                              | Feature support offered by POM                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 72 Hour Policy | When an abandoned call (other than an AMD false positive), has been made to a particular number, any repeat calls to that number in the following 72 hours may only be made with the guaranteed presence of a live operator.                                        | <p>POM provides an out of the box 72 hour rule at the system level, which blocks further calls for 72 hours. The system administrator must associate the rule to the campaign.</p> <p>POM marks the address restricted due to 72 hour rule with a specific completion code.</p> <p>As an option the campaign strategy in POM can be configured to handle the completion code, such that the same address can be dialed again by an agent as a preview dial attempt. This would ensure that an address restricted by 72 hour restriction can be attempted by a guaranteed agent.</p>                     |
| 24 Hour Policy | When a call has been identified by AMD equipment as being picked up by an answer machine (including AMD false positives), any repeat calls to that specific number within the same 24 hour period may only be made with the guaranteed presence of a live operator. | <p>POM provides an out of the box 24 hour rule at the system level, which blocks further calls for 24 hours (same business day). The system administrator must associate the rule to the campaign.</p> <p>POM marks the address restricted due to 24 hour rule with a specific completion code.</p> <p>As an option the campaign strategy in POM can be configured to handle the completion code, such that the same address can be dialed again by an agent as a preview dial attempt. This would ensure that an address restricted by 24 hour restriction can be attempted by a guaranteed agent.</p> |

*Table continues...*

| Feature                    | High level requirement                                                                                                                                                                                                                                                                    | Feature support offered by POM                                                                                                                                                                                                                                                                                                                                                        |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Caller Line Identification | For each outbound call a Caller Line Identification (CLI) number is presented to which a return call may be made which is either a geographic number or a non-geographic number adopted as a Presentation Number which satisfies the Compliance Guide to the use of Presentation numbers. | POM allows configuring the CLI to be used on the outbound call within the campaign strategy associated with the campaign.<br><br>POM provides the following two options: <ul style="list-style-type: none"> <li>Utilizing an administered CLI value per strategy.</li> <li>Fetching the CLI from a field, or attribute of the calling list record within the calling list.</li> </ul> |
| Marketing                  | Any call made by the called person to the contact number provided shall not be used as an opportunity to market to that person, without the person's consent.                                                                                                                             | The contact center management, or customer must address this requirement.                                                                                                                                                                                                                                                                                                             |
| Record Management          | Compliance expects that where organizations are subject to this statement, records are kept for a minimum of six months that demonstrate compliance with the above policy and procedures.                                                                                                 | POM has provision to export campaign data either at the end of a campaign or on a schedule basis.<br><br>Customers are advised to store data externally to persist as required for compliance purposes.                                                                                                                                                                               |

 **Note:**

Compliance rules do apply to predictive or progressive dialing modes, whereby they are not necessarily applicable if the POM solution is used in Preview mode or Manual mode. There is no over-dialing in Preview and Manual dialing as only a single call is placed with the agent being in the call for its full duration also qualifying the call progress. In case of Preview or Manual, the agent has to ensure to respond to the customer according to the compliance regulation.

### Nuisance call rate formula

The nuisance call rate calculation formula is:

```
NCR= ((Nuisance Calls - EstAbandToAnsMach)+AMDFalsePositiveRate * (Calls
PassedToLiveAgent - CallsToAnsMachToLiveAgent)) / ((Nuisance Calls - EstAbandToAnsMach)
+ (CallsPassedToLiveAgent - CallsToAnsMachToLiveAgent))
EstAbandToAnsMach = (CallsToAnsMachToLiveAgent * NuisanceCalls)/CallsPassedToLiveAgent
```

- NuisanceCalls = Abandoned calls
- EstAbandToAnsMach = Estimate of calls abandoned to an answer machine
- CallsPassedToLiveAgent = Calls passed to live agents

- **CallsToAnsMachToLiveAgent** = Calls passed to an agent and marked by the agent as answer machine.

If the **Consider Answer Machine by Agent** check box is enabled in the campaign wizard. This setting needs to be enabled if inclusion of an estimate of calls abandoned to an answer machine is desired.

Additionally the administrator has to define the completion codes being considered as **Answer machine by Agent**. It is the responsibility of the agent to select such a completion code in case of false negative detection, otherwise POM will not consider such calls in the nuisance calculation.

- **AMDFalsePositiveRate** = Answer Machine Detection False Positive Rate

This setting allows for entering a reasoned estimate for an answer machine false positive rate in the campaign wizard. The default value for Answer Machine Detection False Positive Rate is 3.

A call is marked as nuisance as outlined:

- For Agent based campaigns:
  - Customer call is connected but the system disconnects the call before live voice timeout expires or before POM finds an available agent.
  - Customer call is connected but time taken to connect to the agent is more than live voice timer set during campaign administration or the customer disconnects the call in this process (Nuisance application is played. This case is not applicable for enhanced CCA)



**Note:**

Applicable only if the **Consider Answer Machine by Agent** check box is disabled in the campaign wizard,

- If the **Consider Answer Machine by Agent** check box is enabled in the campaign wizard and when customer call is disconnected by the system or customer while call classification was in progress.
- Customer call is attempted to connect to an agent while the agent state is changed by another event at the same time.
- For Agent less Campaigns:
  - In case of a delay of more than 2 seconds between Customer's off hook event and first prompt event of the notification application.
  - If the **Consider Answer Machine by Agent** check box is enabled in the campaign wizard, and when the customer call is disconnected by system while call classification was in progress.

For more information about the start of voice timer and live voice, see the POMDriver application from shipped applications section.

---

## Reset Cruise Control Pacing Parameters

As per the legal compliance requirements, the number of nuisance calls should not go beyond the nuisance rate you configure in the **Maximum allowed nuisance rate** field in the Global

Configuration. The default is three percent for each day. You must reset the cruise control parameters to support the per day nuisance limit for the cruise control algorithm. POM resets these parameters for the jobs based on the user defined inputs. You must configure all the values of these parameters in database. You must update the pim\_config table for following parameters:

- **ResetPacingParamTimeZone:** ResetPacingParamTimeZone is the timezone for which you want to reset the pacing parameters. Time zone values should be Java Time zone IDs. In case of DST, you must provide time zone id such that it considers the DST changes. Default Value is Europe/London.
- **PacingParamResetType:** PacingParamResetType parameter can have two values:
  - **AfterNHours:** Use this to reset after 'n' number of hours from start of the job. You can configure number of hours in ResetPacingParamDuration parameter. Use the value '0' to reset the pacing parameters after 'n' number of hours.
  - **midNight:** Use this to reset the pacing parameters every midnight at 12:00 AM. Use value '1' to reset the pacing parameters every midnight.

The default value of parameter PacingParamResetType is 0.

- **ResetPacingParamDuration:** Set this value if you are setting the PacingParamResetType to "AfterNHours". The ResetPacingParamDuration value indicates after how many hours you must reset the pacing parameters. The default value is 0, which means, do not reset the pacing parameters.

# Chapter 12: Audit Log Viewer

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## Audit Log Viewer overview

With this feature, you can create a report of audit logs. The report displays the details of logged activities of POM.

For example, administrative activities.

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## Accessing Audit Log Viewer

### Procedure

1. Log in to Avaya Experience Portal.
2. Click **System Maintenance > Audit Log Viewer**.

### Result

POM displays the Audit Log Viewer page.

---

## Audit Log Viewer page field descriptions

Use this page to create an Audit log report for the details of the administration related activities for POM.

| Field or Button | Description                                                                                                                                                                                 |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sort By         | Use this to view the log files sorted on one of the following actions: <ul style="list-style-type: none"><li>• Time: newest first</li><li>• Time: oldest first</li><li>• Category</li></ul> |

*Table continues...*



| Field or Button          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Search Keywords</b>   | <p>Use this to specify the text to search for in the audit log records. The search is case insensitive and based on a substring match, not a whole string match.</p> <p>For example, "Acknowledged" matches "acknowledged", "ACKNOWLEDGED", and "unacknowledged".</p> <p>The search uses a logical OR when combining keywords. You can separate multiple entries with a comma, and use the tilde character (~) to indicate NOT.</p> <p>For example, if you enter <code>login, logoff, ~user=admin</code>, the report displays any records that contain the string "login" or "logoff" for all users, except those user accounts that start with the string "admin". If you enter <code>login, logoff, ~ADMIN</code>, the report displays any records that contain the string "login" or "logoff" but that do not contain the string "admin" anywhere within the record.</p> |
| <b>Category</b>          | <p>Use this to view the logs as per the following categories:</p> <ul style="list-style-type: none"> <li>• POM Administration</li> <li>• POM Campaign Director</li> <li>• POM Campaign Manager</li> <li>• POM Reporting</li> <li>• POM SMS Manager</li> <li>• POM Web Services</li> <li>• POM Agent Manager</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Action</b>            | <p>Use this view to log files based on one of the following actions:</p> <ul style="list-style-type: none"> <li>• All Actions</li> <li>• Add</li> <li>• Change</li> <li>• Delete</li> <li>• View</li> </ul> <p> <b>Note:</b></p> <p>If you choose All Actions, you can view the report for add, change and delete action supported by POM.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Predefined Values</b> | <p>Use this view the log files based on one of the following timestamp values:</p> <ul style="list-style-type: none"> <li>• All Dates and Times</li> <li>• Today</li> <li>• Yesterday</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

*Table continues...*

| Field or Button | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Last</b>     | <p>Limits the report to a specific number of days or hours.</p> <p>Enter that number of days or hours in the associated text field, then select Days or Hours from the associated drop-down list. You can enter a whole number from 1 to 99. The system calculates the number of days from midnight to 11:59 p.m.</p> <p>For example, if the current time is 3:00 p.m. on Wednesday and you enter a 3 in this field and select Days from the drop-down list, the report includes all activity starting on Monday at midnight through the end of the current day.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Between</b>  | <p>Limits the report to a specified range of dates. The default range covers a 7-day time span that ends with the current date and time.</p> <p>To get a different range of dates, perform the following:</p> <ul style="list-style-type: none"> <li>• In the <b>Start Date/Time</b> field, enter the start date using the format dd-mmm-yyyy or click the calendar icon to select the date from a pop-up calendar. After the start date, enter the start time using a 24-hour format and the same timezone as the specified on the POM server.</li> </ul> <p>For example, enter 03-Mar-2007 16:26:10. The default for this field is one week prior to the current date at time 00:00:00.</p> <ul style="list-style-type: none"> <li>• In the <b>End Date/Time</b> field, enter the end date using the format dd-mmm-yyyy or click the calendar icon to select the date from a pop-up calendar. After the end date, enter the end time using a 24-hour format and the same timezone as specified on the POM server.</li> </ul> <p>For example, enter 10-Mar-2007 16:26:10. The default for this field is the day prior to the current date at time 23:59:59.</p> |

The amount of data available for this report depends on the setting in the **Retention Period** field in the Audit Logs group on the Alarm/Log Options page.

For example, if the **Retention Period** field value is set to 14, you can enter a start date that is two weeks before the current date. If **Retention Period** field value is set to 7, you can only check for the previous week.

# Chapter 13: Resources

## Documentation

For information about feature administration, interactions, considerations, and security, see the following POM documents available on the Avaya Support site at <http://www.avaya.com/support>:

| Title                                                                      | Description                                                                                                                                          | Intended audience                                                                                                          |
|----------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| <i>Avaya Proactive Outreach Manager Overview and Specification</i>         | Provides general information about the product overview and integration with other products.                                                         | Users                                                                                                                      |
| <i>Implementing Avaya Proactive Outreach Manager</i>                       | Provides information about installing and configuring Proactive Outreach Manager.                                                                    | Implementation engineers                                                                                                   |
| <i>Upgrading Avaya Proactive Outreach Manager</i>                          | Provides information about upgrading Proactive Outreach Manager.                                                                                     | Implementation engineers                                                                                                   |
| <i>Troubleshooting Avaya Proactive Outreach Manager</i>                    | Provides general information about troubleshooting and resolving system problems, and procedures for finding and resolving specific problems.        | <ul style="list-style-type: none"><li>• System administrators</li><li>• Implementation engineers</li><li>• Users</li></ul> |
| <i>Avaya Aura® Contact Center - Proactive Outreach Manager Integration</i> | Provides conceptual and procedural information about the integration between Avaya Aura® Contact Center and Proactive Outreach Manager.              | Users                                                                                                                      |
| <i>Using Avaya Proactive Outreach Manager Reports</i>                      | Provides information about reports in Proactive Outreach Manager.                                                                                    | System administrators                                                                                                      |
| <i>Using Avaya Workspaces for Avaya Proactive Outreach Manager</i>         | Provides instructions on using Avaya Workspaces for Proactive Outreach Manager.                                                                      | Users                                                                                                                      |
| <i>Using Avaya Proactive Outreach Manager Supervisor Dashboard</i>         | Provides instructions on using Proactive Outreach Manager Supervisor Dashboard                                                                       | <ul style="list-style-type: none"><li>• Supervisors</li><li>• System administrators</li></ul>                              |
| <i>Avaya Proactive Outreach Manager High Availability</i>                  | Provides information for implementing POM system in a single data center, and also explains functioning of POM during failure and high availability. | <ul style="list-style-type: none"><li>• Users</li><li>• System administrators</li><li>• Implementation engineers</li></ul> |

You must install Avaya Experience Portal before you install POM. You will find references to Avaya Experience Portal documentation at various places in the POM documentation.

## Finding documents on the Avaya Support website

### Procedure

1. Go to <https://support.avaya.com>.
2. To log in, click **Sign In** at the top of the screen and then enter your login credentials when prompted.
3. Click **Product Support > Documents**.
4. In **Search Product**, start typing the product name and then select the appropriate product from the list displayed.
5. In **Select Release**, select the appropriate release number.  
This field is not available if there is only one release for the product.
6. **(Optional)** In **Enter Keyword**, type keywords for your search.
7. From the **Select Content Type** list, select one or more content types.  
For example, if you only want to see user guides, click **User Guides** in the **Select Content Type** list.
8. Click  to display the search results.

---

## Support

Go to the Avaya Support website at <https://support.avaya.com> for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

# Appendix A: Agents, agent states, call states, and job states

## Agents

An agent is a person who handles incoming or outgoing calls for a business. A contact center agent might handle account inquiries, customer complaints, or the support issues.

POM manages the agents by implementing a state machine for each agent. Through Agent APIs, POM also provides a way to login these agents. When an agent logs in to POM, POM stores the logged in agent and manages the agent lifecycle through an agent session. The system creates an agent session when an agent logs in and ends when the agent logs out. In one agent session, the agent can either get attached to various agent-based campaigns or can serve inbound calls as a blended agent. Supervisor Dashboard facilitate the administration and management of these agents. Administrator can view the current statistics of an agent, and controls the agent statistics through Supervisor Dashboard .

You can view various agent properties through Supervisor Dashboard. The important properties are agent skills, zone, time-zone, locale, and agent extension and agent states. Apart from agent states, it specifies the other properties in the Login command, which marks the beginning of an agent session, while the agent states are run-time properties and you can view on Supervisor Dashboard and are managed by POM.

Agent's state is a collection of sub states that include Agent State, Call State, and Job State. Agent State includes Ready, Not Ready, Pending Not Ready, Logout, Busy, Work Not Ready, Unknown states. Agent state indicates whether an agent is working or idle. Call state includes Idle, Talking, Callback, Conference Owner, Conference Passive, Consult, Preview, Wrapup. Job State can be Job Attached, Job Detached, Job End, Pending Inbound, Job Inbound, Pending Manual Inbound, Pending Job Movement, Pending Job Attach.

## Agent states

- *Ready*: When an agent logins and sends *Ready* command from desktop, POM puts the agent in *Ready* state. The agent is available to take calls. If an agent is attached to a campaign and there are contacts in that campaign, POM connects calls to such agents.
- *Pending Not Ready or Not Ready*: When an agent sends a *NotReady* command from agent desktop, POM puts the agent into Not Ready state. On getting request from desktop POM can move that agent to not ready state. The agent is unavailable to take calls. On receiving this command from desktop, POM makes sure that it excludes this agent from available agent pool and it does not give further calls to the agent. An agent can send this command anytime, so if the agent is already busy with a customer call, POM puts such agent in *Pending Not Ready* state. When the agent's current work is over, it moves the agent to *Not Ready* state. However, through this command an agent can also change the reason for going to *Not Ready* state. Issuing this command in *Not Ready* state with new reason code can change the reason of the

*Not Ready* state. Agent desktop can send request to move an agent to *Not Ready* state with walkaway status if agent is not doing any activity on desktop. In such case POM generates a major alarm P\_POMAGT16. For more information about the alarm, see *Troubleshooting Proactive Outreach Manager*.

- *Log Out*: When an agent sends Logout command from desktop, POM puts the agent in the logout state. POM permits only *Not Ready* agents to logout. However, under some circumstances POM also permits a pending logout of an agent through *Pending Logout* command. This command is for integrated desktops that can communicate with contact center. If the desktops find that the agent does not have any outbound skills, then these desktops can send this command to logout the agent.
- *Busy*: This state indicates that an agent is interacting with the customer. In this state, the agent call states can be either *Talking*, *Dialing*, *Preview*, *ConferenceOwner*, *ConferencePassive*, *Consult*, or *Callback*.
- *Work Not Ready*: When an agent or the customer ends up a customer call, agent wants to update customer call information in to system. An agent can do this when the agent is in wrapup state. When the customer call ends, either by the agent or by the customer, POM puts the agent in *Wrapup* and *Work Not Ready* state. If nailing of an agent drops while the agent was *Busy*, then also agent goes into *Wrapup* and *Work Not Ready* state. For more information about nailing, see *Proactive Outreach Manager Overview and Specification Guide*.

## Agent call states

Agent call states broadly represent the states in which the customer contacts the agent. The different call states are:

- *Idle*: This state represents that agent is available for POM system to connect with customer call.
- *Preview*: This state represents that the POM system has offered a preview of customer data to agent and agent can be in next possible states as either *Dialing* or *Wrapup*, that depends on whether agent accepts or rejects the customer preview. POM receives the *Preview Dial* command when the agent accepts the preview in desktop, while *Preview Cancel* command is sent when agent cancels to dial the customer using offered preview.
- *Callback*: This state represents the agent has a preview of customer data who has requested a callback. Similar to preview state it also has the same set of next state as either *Dialing* or *Wrapup*. You can send *Preview Dial* and *Preview Cancel* commands after this state from the agent desktop depending on whether agent decide to dial the customer or reject the preview respectively.

POM server can send time in UTC (yyyy/MM/dd HH:mm) in pending callback notification if the UTC is set in TimeZonePendingCallbackDueTime parameter of pim\_config table. The query to update this parameter is:

```
update pim_config set config_value='UTC' where
config_name='TimeZonePendingCallbackDueTime'
```

The existing functionality in which POM sends the due time as per the POM server time zone is the default behavior, and is used to maintain backward compatibility.

Earlier, the skill information was refreshed from Communication Manager when an agent was attached to the job. Any request to refresh the skill would take time to reflect depending on Communication Manager work load. In the current release of POM, we do not refresh the skill information while attaching an agent to a job. If the agent skill information changes, the agent needs to logout and login again for the changes to take effect.

Earlier for agent type of callback, the list of agents was fetched from Communication Manager. In the current release of POM, we fetch the list of agents from POM database cache. In case of fresh install or upgrade, when the agent logs in for the first time, the agent can view the skill information and other details of all agents who are logged in at that point of time for callback.

- *Talking*: This state tells that the agent is on the call with the customer. While agent is in *Preview* or *Callback* states, and decides to dial the customer and customer picks up the call, then agent goes into *Talking* state. In *Progressive* or *Cruise Control* type of campaigns the agent directly goes into *Talking* state from *Idle* state. In such campaigns, the system launches the call and after detecting a live voice, the system connects the agent with the call. POM displays the *Talking* state as *Call Connect*. Agent Activity Details report. An agent can also choose to redial a customer call in the *Wrapup* state. If the call succeeds, POM again puts the agent in *Talking* state. In this case, it displays the *Talking* state as *Call Connect* in the POM Agent Activity Details report.
- *Hold*: This state displays when the agent has put the customer call on hold. The agent can send a *Hold Call* command from desktop to put a customer call on hold. When customer call is on hold, the system plays the application configured in campaign strategy for hold. The agent can also send a *Unhold* command from desktop to unhold the customer call. The unhold command changes the agent state from *Hold* to *Talking*. The system stops playing the hold application. When the agent is a *ConferenceOwner* of a conference, the agent can put the customer call on *Hold*. This situation is similar to *Consult* where the agents can talk with each other while the customer is on hold.
- *Consult*: Consult is the state when agent talking with customer tries to consult another agent or external party for consultation. An agent can send *Consult* command from desktop to initiate a consult. If the other agent is already busy with a customer call, the agent gets a pending consult request. POM makes sure that it gives this pending consult to the agent when agent finishes the current work. At most an agent can have maximum of two pending consults request while agent is busy with other customer call. If the other agent is in *Idle* state then it directly takes the agent to a *Consult* state. During an active consult, customer call is on hold and hold music is played.

With the aid of this pending consult notification, other agent gets to learn about a pending activity. The agent then can either expedite up the current call, or can reject the pending consult request.

The agent manager cannot identify passive agent nailing. The owner agent of the consult or conference can release the passive agent from the conference if the nailing drops. When passive agent loses nailing, the owner agent knows as the voice of passive agent also drops. In such a case the owner can either cancel the consult or end the conference depending on whether the agents are in consult or conference, respectively. When such action occurs the passive agent comes out of the consult or conference.

If you are using Avaya Aura Agent Desktop (AAAD) to access agent functionality, and the agent initiates a consult with another agent, then it shares the details pertaining to the customer and the agent notes with the consult recipient agent when the conference is completed, not during the consult phase. For more information about agent behavior, see *Agent Desktop User Guide*.

- *Transfer or Conference*: POM supports only consultative transfers and remove the conferences. Both parties must be in consult state before initiating transfer or conference while customer call is on hold. After this state an agent can go either in transfer or conference state. Agent can send transfer command to transfer the current customer call to another agent. After the call is transferred successfully to other agent, the initiator goes into "Idle" state to take



next calls and the other agent becomes the owner of that customer call. The responsibility of wrapping up customer call also lies with the owner agent. In this case, POM displays the talking state as Call Continue(transferred) in the POM Agent Activity Details report.

Similarly an agent can send conference command to conference another agent. POM supports three party conference only which includes two agents and one customer only. After the conference is successful, the initiator goes in to Conference Owner state and the other agent goes in to conference passive state.

A POM agent can transfer a call to an external party during a consult, or a conference, while placing a customer call on hold. The agent who originates the consult, or transfer, or conference can exit the call after transferring it. External transfer at telephony level generates "Refer with Replaces" SIP request for the external party, or the agent. The agent endpoint or gateway in between must handle the "Refer with Replaces" request and generate an "Invite with Replaces" request for the customer call leg. In the enterprise network, Avaya Aura<sup>®</sup> Communication Manager (CM), or the gateway interfacing the external agent has to handle it.

On transfer during a conference, the POM system disposes the call and the agent Desktop gets the CallWrapUp pop-up window to mark the completion code. To identify the calls that are transferred to an external party, the agent must dispose the call with "Transferred to external number" custom completion code, which can be configured on the Campaign Creation page.

POM Campaign Detail report displays the completion code "Transferred to external number" for calls that are transferred to an external party. The agent activity detail report displays the agent activity as "Wrap-up" calls get disposed from the POM system.

- *ConferenceOwner or ConferencePassive*: The agent who initiates the conference request is *ConferenceOwner*. The agent who accepts the conference request is *ConferencePassive*. The conference owner can change the ownership of conference by sending Change conference ownership command. The conference owner can make other agent as owner of this conference. The call wrapup responsibility lies with conference owner always. At any point of time in the conference, either of the agents can end the conference. Ending the conference takes the passive agent to Idle state where the agent can take next calls, while the owner goes into Talking state and the owner can wrapup the call. Similarly, if customer drops the call in a conference the conference ends and the owner goes into *Wrapup* state, while passive agent goes to Idle state and take next calls.

The agent manager is unable to identify passive agent nailing. The owner agent of the consult or conference can release the passive agent from the conference if the nailing drops. When the passive agent loses nailing, the owner agent knows as the voice of passive agent also drops. In such a case the owner can either cancel the consult or end the conference depending on whether the agents are in consult or conference respectively. The passive agent comes out of the consult or conference call.

- *Wrapup*: Wrapup is the state where agent gets some time to add some feedback about the customer and give the proper disposition to the call. POM sends a list of custom completion codes that are associated with the campaign of which the agent processes the contact. Among these completion codes, one of these completion codes, is a default completion code that is defined in the campaign strategy. If agent failed to update completion code in given wrapup time then POM automatically updates the default completion code, moving the agent to idle state for taking next calls. POM sends the configured wrapup time and number of wrap time extension. An agent can have to dispose the call when agent is in wrapup state. However, from POM perspective it is a guideline and to implement this timer and number of wrap time extension are the obligations of desktop. When, desktop sends Wrapup Contact command,



either self-generated because of expiry of timer or agent initiated, POM makes this agent available for next calls by taking the agent to Idle state.

**\* Note:**

The system can show an agent in Wrapup state even if the agent is talking with the customer and the agent desktop shuts down abnormally and the desktop has already invoked the AGTSaveAgentForHA command. For more information about the AGTSaveAgentForHA command, see *Proactive Outreach Manager Developer Guide*.

- *Dialing*: When the agent accepts the preview on desktop, it sends the preview dial command to POM, changing the agent call state to *Dialing*. The agent can also be in the Dialing state on redial.

## External Transfer Limitations

The external transfer feature has the following limitations:

1. External agent being station or VDN on CM, CM must know the route to the customer or Address of Record (AOR) that is mentioned in the Refer-To header of REFER request that the MPP generates during the transfer.

```
Refer-To:<;sips:3ld812adkjw@biloxi.example.com;gr=3413kj2h?
Replaces=090459243588173445%3Bto-tag%3D7553452%3Bfrom-tag%3D31431:>;
```

If the MPP places the customer call through the same CM, then the CM does the routing. Else, you must configure the CM so that it routes the “Invite with Replace” to the desired gateway or trunk through which customer outbound call is made. The customer call can then be transferred to an external agent.

To achieve this routing, make a route-pattern on the CM and put it in the locations. In the route-pattern, put trunks to the gateway or Avaya Aura<sup>®</sup> Session Manager which can route “Invite with Replace” further to the customer.

2. External agent being a SIP endpoint registered on Session Manager, the SIP endpoint must support “Refer with Replaces”. As observed, Avaya Workplace Client or Avaya one-X<sup>®</sup> Communicator does not support this and end up dialing a new call to the customer.
3. External agent is a PSTN entity that is dialed out of the Enterprise network. If the external agent is dialed out through a trunk on CM to the PSTN network, the CM fails to transfer the call and drops the external agent’s ongoing call if “Disconnect Supervision” is disabled for the outgoing trunk. To fix this issue and transfer the call, change the trunk-group and set the **Disconnect Supervision-Out?** to ‘Y’.

**\* Note:**

You must set the **Disconnect Supervision In and Out** values in Avaya Aura<sup>®</sup> Communication Manager. For more information on **Disconnect Supervision In and Out**, see *Proactive Outreach Manager Integration Guide*

## Job states

The agent job states represent the agent state related to job-task to which the agent is attached. A job-task in POM is an entity that consists of Job ID, Action Name, and Zone Name. POM distributes the Agent licenses at these job-tasks level. Hence, these states also affect the licensing and have

impact on the nailing of an agent. For more information about nailing, see *Proactive Outreach Manager Overview and Specification Guide*.

- **JobAttached:** JobAttached is the state when agent is assigned to a job.
- **JobDetached:** JobDetached is the state when agent is removed from the job.
- **JobEnd:** JobEnd is the state when the job task removes the agent. The agent can be put in Job End state when:
  1. Campaign pauses or ends
  2. Agent is moved from one job to another
  3. When the system donates the agent to other job because of limited number of available agents.

 **Note:**

Job End does not mean that the running job is finished or terminated. Job End means that an agent is no longer associated with the job. Hence the job for the specific agent ends.

- **JobInbound:** JobInbound is the state when the agent is released from Outbound activity. Agent Manager does not assign any job to such agents. Hence agent is free to take inbound calls. The system can put the agent in this state either when administrator invokes *Release from Outbound* command from Supervisor Dashboard, or the blender component of the system invokes the command *BlendToInbound* for a particular agent. For more information about blending, see *Proactive Outreach Manager Overview and Specification*.
- **Pending Inbound:** Pending Inbound is the state when the agent is marked for inbound, but the transition is not complete as agent is busy with the current outbound call. Pending Inbound is a transition state.
- **Pending Outbound:** Pending Outbound is the state when agent is marked for outbound, but the transition is not complete as agent is busy with the inbound call. Pending Outbound is a transition state.
- **Pending Manual Inbound:** Pending Manual Inbound is the state when an agent is moved from outbound to inbound manually. This command is given on Supervisor Dashboard and through JMS it is communicated to PAM. The agent, if busy, is kept in this state until the current call ends. Then the state is transitioned to JobInbound. The command can be given for any agent from Supervisor Dashboard. If the agent is idle, this transition is immediate, otherwise, a supervisor can see this job state in the Supervisor Dashboard under the job state of an agent. The system can ignore the command *Release From Outbound* in some scenarios such as:
  - The agent has some pending activity such as PendingCallback or PendingConsult.
  - During HA of the agent manager.
  - If JMS is not functional.

For such scenarios, the system raises an event P\_POMAGT50. For more information about the event, see *Troubleshooting Proactive Outreach Manager*.

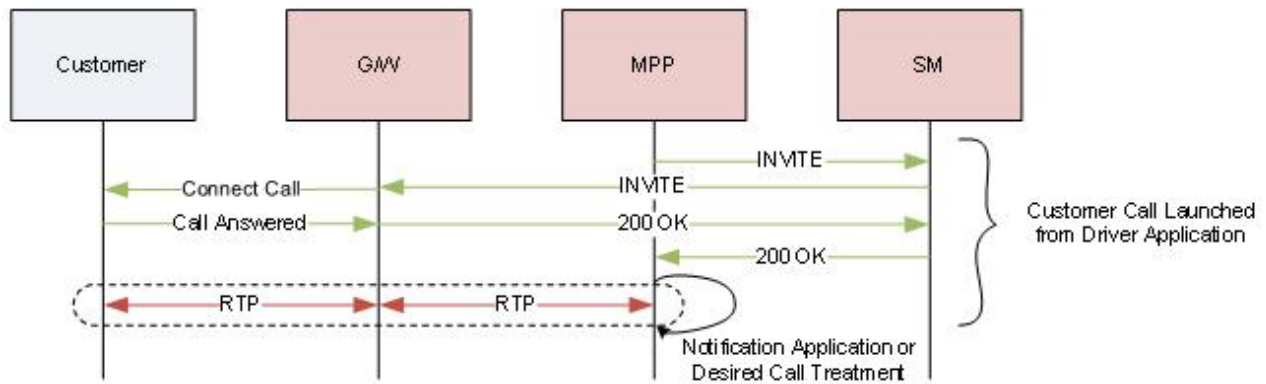
- **Pending Manual Job Movement:** Pending Manual Job Movement is when an agent is moved from one outbound job to another outbound job. If an agent is currently busy talking with customer, and is kept in this state until the current call ends. Then the state is moved to Job Attached state. These parameters must be filled by supervisor with caution as the movement is bound to create effects in the system. The system tries to move some other agent to the job to

which this agent was associated. This fills the shortage of the agent. Hence, you must change all parameters in one go.

- *Pending Job Attach*: Pending Job Attach is the state when agent is associated with the job. When a nailing request is sent to an agent, this request is attached to a respective job. This request state is temporary and once agent is nailed the agent job state changes to Job Attached.

# Appendix B: Call flows

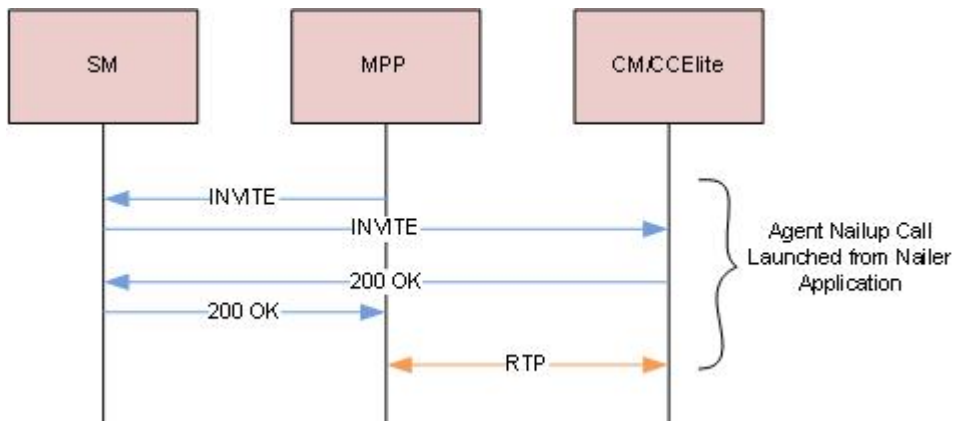
## Customer call



The following steps explain a customer call flow:

1. Driver Application launches call to the Customer from MPP by sending SIP INVITE.
2. SIP INVITE is routed by System Manager towards the Gateway (G/W).
3. G/W places the call to the Customer present outside the enterprise.
4. On successfully connecting to the Customer, G/W completes the INVITE transaction, and MPP plays the desired message to the customer, or gives some call treatment.

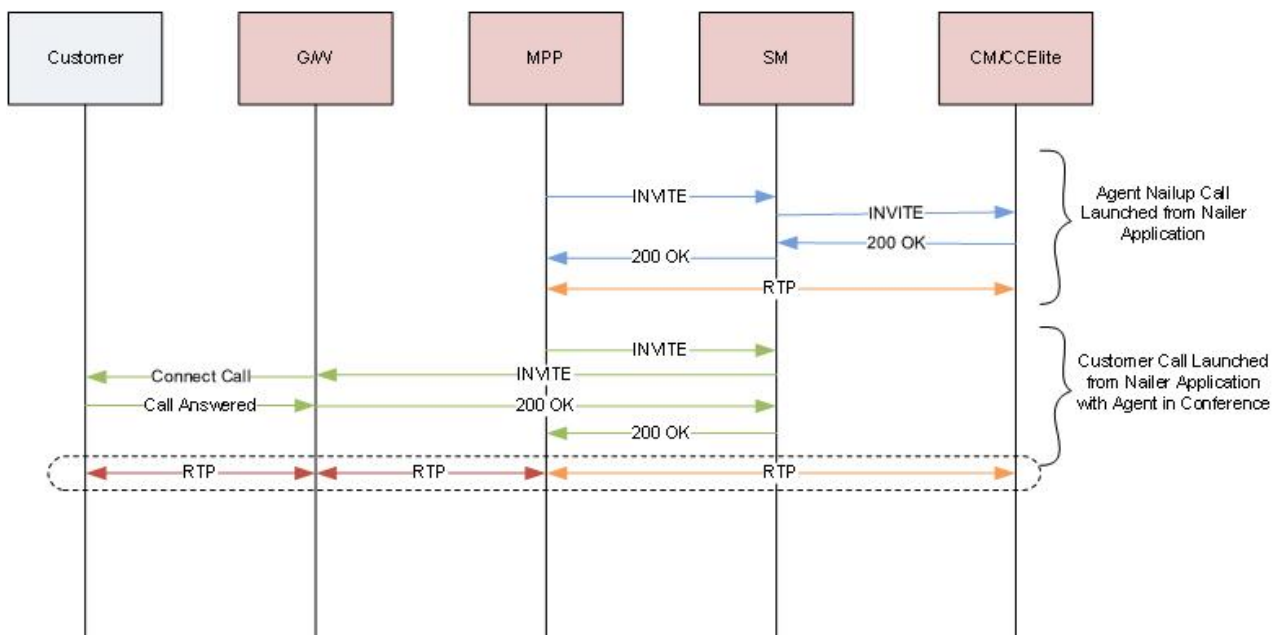
## Agent Nailup Call



The following steps explain an agent nailup flow:

1. POM instructs Nailer Application to launch Nailup call to the agent from the MPP.
2. MPP sends INVITE to the agent on Avaya Aura® Communication Manager (CM) / Avaya Aura® Call Center Elite (CCElite) via System Manager (SM).
3. On completion of INVITE transaction, agent call gets anchored on the MPP.
4. During the Nailup session only MPP conferences the customer calls as per the POM campaigns.

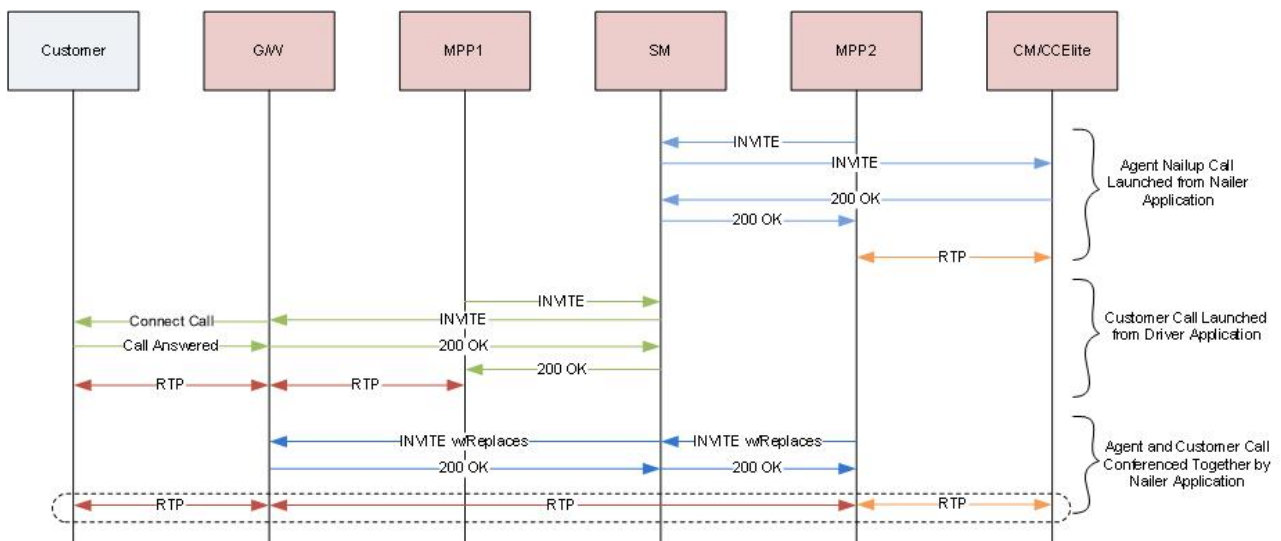
## Preview campaign or Agent Redial



The following steps explain Preview campaign, or agent redial flow:

1. POM instructs MPP to launch a Nailup call to Agent.
2. MPP2 sends INVITE to the Agent on Avaya Aura® Communication Manager (CM) / Avaya Aura® Call Center Elite (CCElite) via System Manager (SM). On completion of INVITE transaction, the Agent call gets anchored on MPP.
3. In Preview campaign or Agent Redial, POM asks MPP to launch another call to the customer with Agent Nailup call in conference.
4. MPP sends INVITE to the Customer, which lands on Gateway via SM. Gateway tries to connect to the Customer outside enterprise.
5. On successfully connecting to the Customer, Gateway completes the INVITE transaction, and the Customer call gets anchored on MPP, where it is already conferenced to the Agent Nailup call.

## Progressive campaign

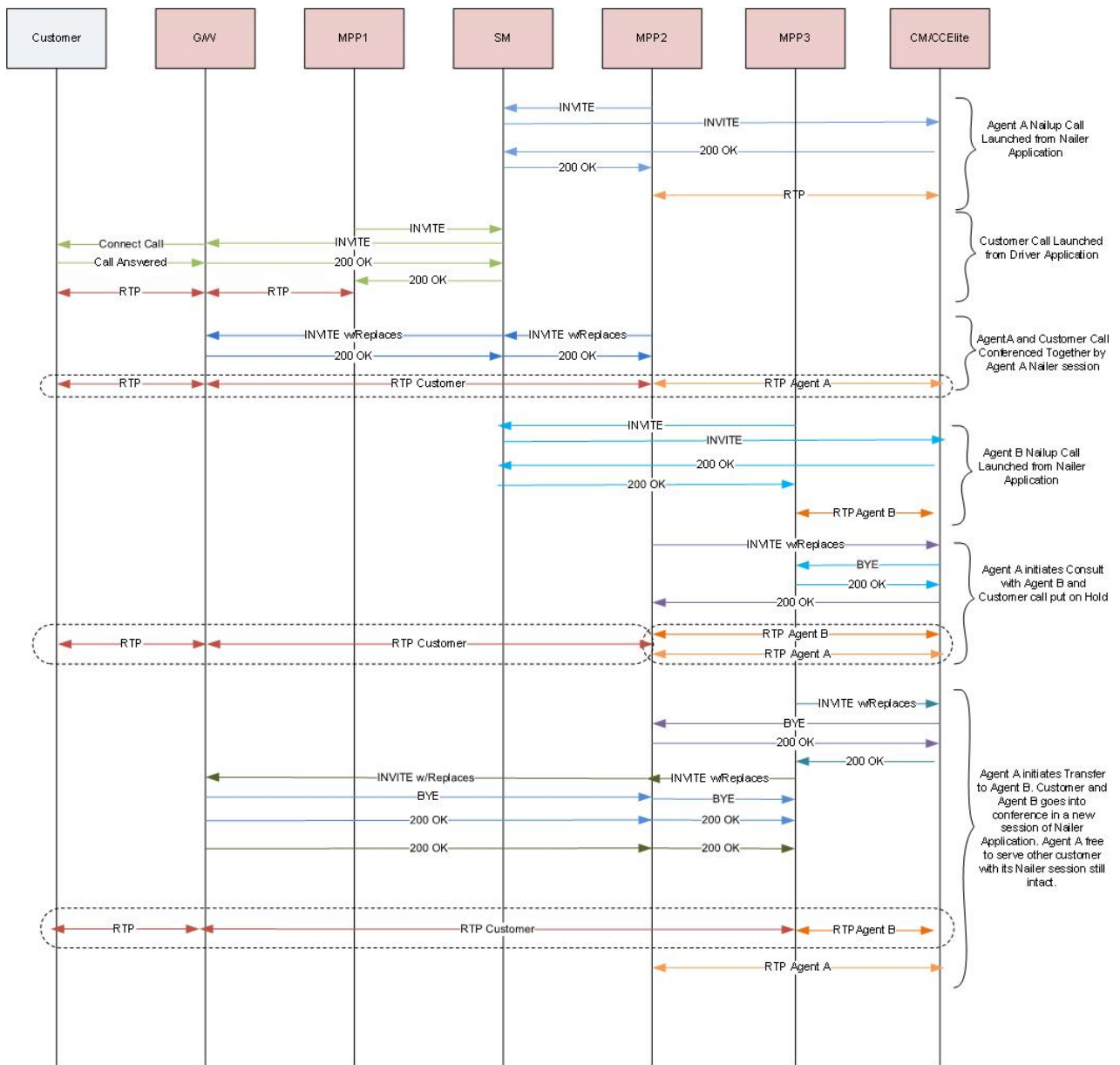


The following steps explain Progressive campaign flow:

1. POM instructs MPP2 to launch a Nailup call to Agent.
2. MPP2 sends INVITE to the Agent on Avaya Aura® Communication Manager (CM) / Avaya Aura® Call Center Elite (CCElite) via System Manager (SM). On completion of INVITE transaction, the Agent call gets anchored on MPP2.
3. POM instructs MPP1 to start an outreach attempt to the customer.
4. MPP1 sends INVITE to the Customer, which lands on Gateway via SM. Gateway tries to connect to the Customer outside enterprise.
5. On successfully connecting to the Customer, Gateway completes the INVITE transaction, and the Customer call gets anchored on MPP2.

6. For Agent customer interaction, MPP2 initiates an INVITE with Replaces for Customer call leg.
7. This INVITE with Replaces lands on Gateway via SM. The Gateway then transfers the customer call leg to MPP2.
8. Agent and Customer start talking as their RTP are processed by MPP2.

## Internal consult transfer



The following steps explain internal consult transfer flow:

1. POM instructs MPP2 to launch a Nailup call to Agent A.
2. MPP2 sends INVITE to Agent A on Avaya Aura® Communication Manager (CM) / Avaya Aura® Call Center Elite (CCElite) via System Manager (SM). On completion of INVITE transaction Agent call gets anchored on MPP2.
3. POM instructs MPP1 to start an outreach attempt to the customer.
4. MPP1 sends INVITE to Customer which lands on Gateway via SM. Gateway tries to connect to the Customer outside enterprise.
5. On connecting to the Customer, Gateway completes the INVITE transaction, and Customer call gets anchored on MPP2.
6. For Agent customer interaction, MPP2 initiates an INVITE with Replaces for Customer call leg. The INVITE with Replaces lands on Gateway via SM, after which the Gateway transfers the customer call leg to MPP2.

Agent A and Customer start talking as their RTP are processed by MPP2.

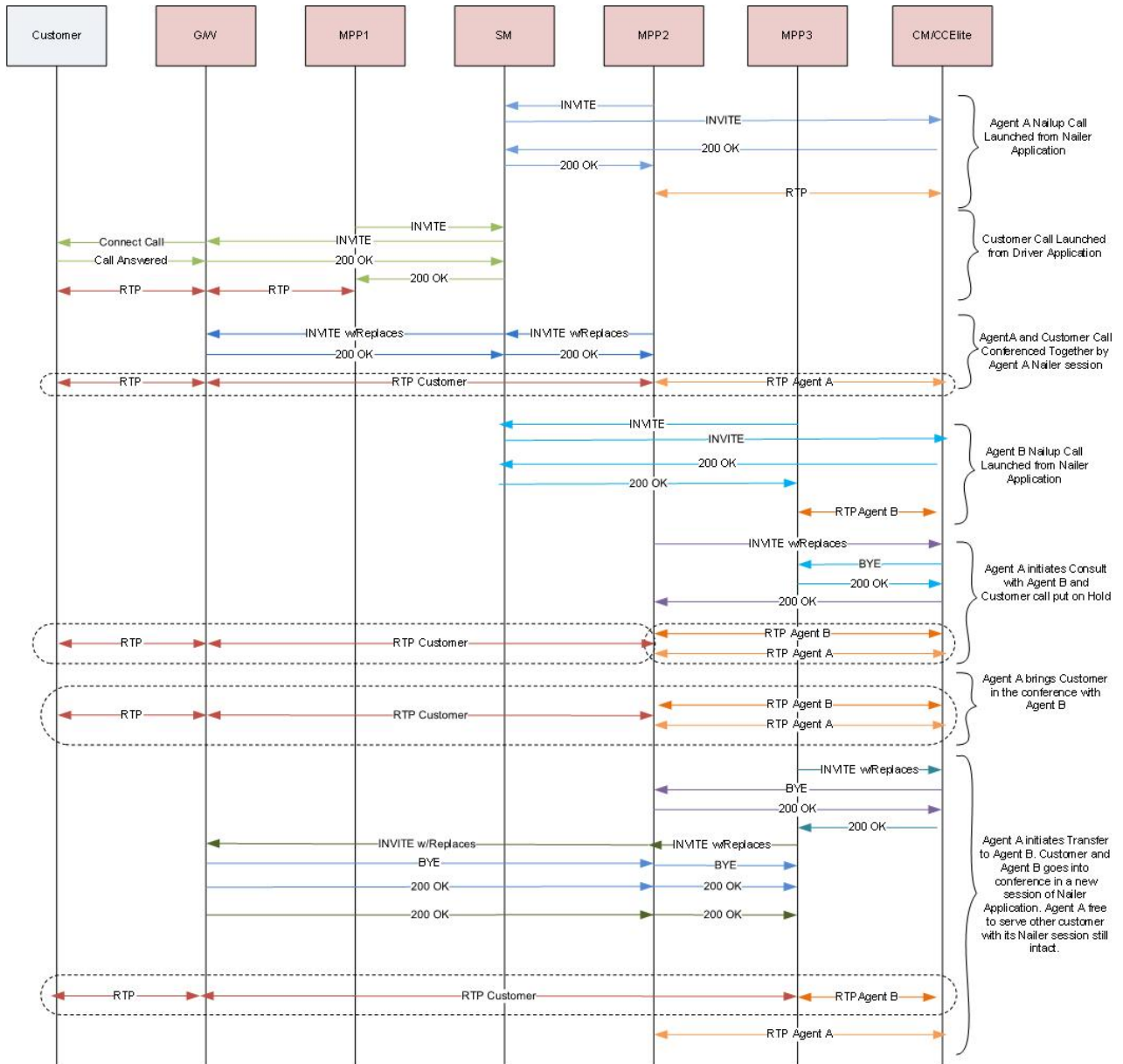
7. For Internal consult there has to be another agent which has to be part of the same campaign as the Agent A. Agent B is in a Nailup call launched by separate session of Nailer Application launched on MPP3.

Agent A initiates a consult with Agent B and customer call goes on hold with a Music-on-Hold Application being played to the customer leg.

8. MPP2 sends INVITE with Replaces to CM/CCElite for Agent B. After completion of INVITE with Replaces transaction, Nailup call of Agent B drops from MPP3 and Agent B is in a consultation call with the Agent A anchored on MPP2.
9. After the consultation, Agent A transfers the customer to Agent B.  
For transfer a new session of Nailer Application is launched on MPP3. The existing call data of Customer and Agent B is passed to this new session by POM.
10. MPP3 then launches two separate INVITE with Replaces for customer and Agent B respectively.
11. After completion of these INVITE with Replaces transaction, Agent B and Customer call is anchored on MPP3.
12. Nailup call of Agent A remains intact on MPP2, and Agent A continues to process further contacts.



## Internal conference transfer



The following steps explain internal conference transfer flow:

1. POM instructs MPP2 to launch a Nailup call to Agent A.
2. MPP2 sends INVITE to Agent A on Avaya Aura® Communication Manager (CM) / Avaya Aura® Call Center Elite (CCElite) via System Manager (SM). On completion of INVITE transaction Agent call gets anchored on MPP2.
3. POM instructs MPP1 to start an outreach attempt to the customer.
4. MPP1 sends INVITE to Customer which lands on Gateway via SM. Gateway tries to connect to the Customer outside enterprise.

5. On connecting to the Customer, Gateway completes the INVITE transaction, and Customer call gets anchored on MPP2.
6. For Agent customer interaction, MPP2 initiates an INVITE with Replaces for Customer call leg. The INVITE with Replaces lands on Gateway via SM, after which the Gateway transfers the customer call leg to MPP2.

Agent A and Customer start talking as their RTP are processed by MPP2.

7. For Internal consult there has to be another agent which has to be part of the same campaign as the Agent A. Agent B is in a Nailup call launched by separate session of Nailer Application launched on MPP3.

Agent A initiates a consult with Agent B and customer call goes on hold with a Music-on-Hold Application being played to the customer leg.

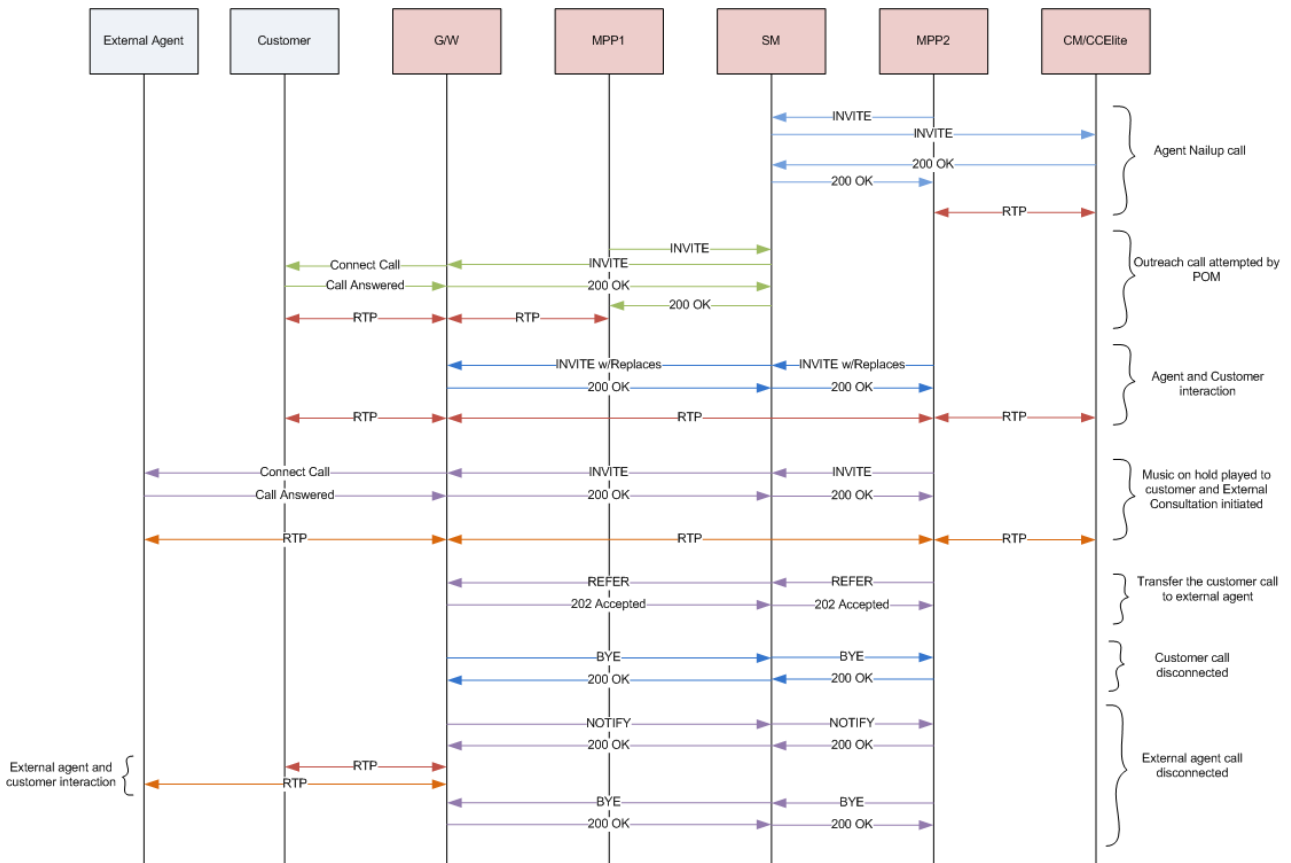
8. MPP2 sends INVITE with Replaces to CM/CCElite for Agent B. After completion of INVITE with Replaces transaction, Nailup call of Agent B drops from MPP3 and Agent B is in a consultation call with the Agent A anchored on MPP2.
9. After the consultation, Agent A brings the customer in conference with Agent B. All three can talk to each other during this conference.

Within the conference, Agent A transfers the customer to Agent B.

For transfer, a new session of Nailer Application is launched on MPP3. The existing call data of Customer and Agent B is passed to this new session by POM.

10. MPP3 then launches two separate INVITE with Replaces for customer and Agent B respectively.
11. After completion of these INVITE with Replaces transaction, Agent B and Customer call is anchored on MPP3.
12. Nailup call of Agent A remains intact on MPP2, and Agent A continues to process further contacts.

## External transfer from a Consult

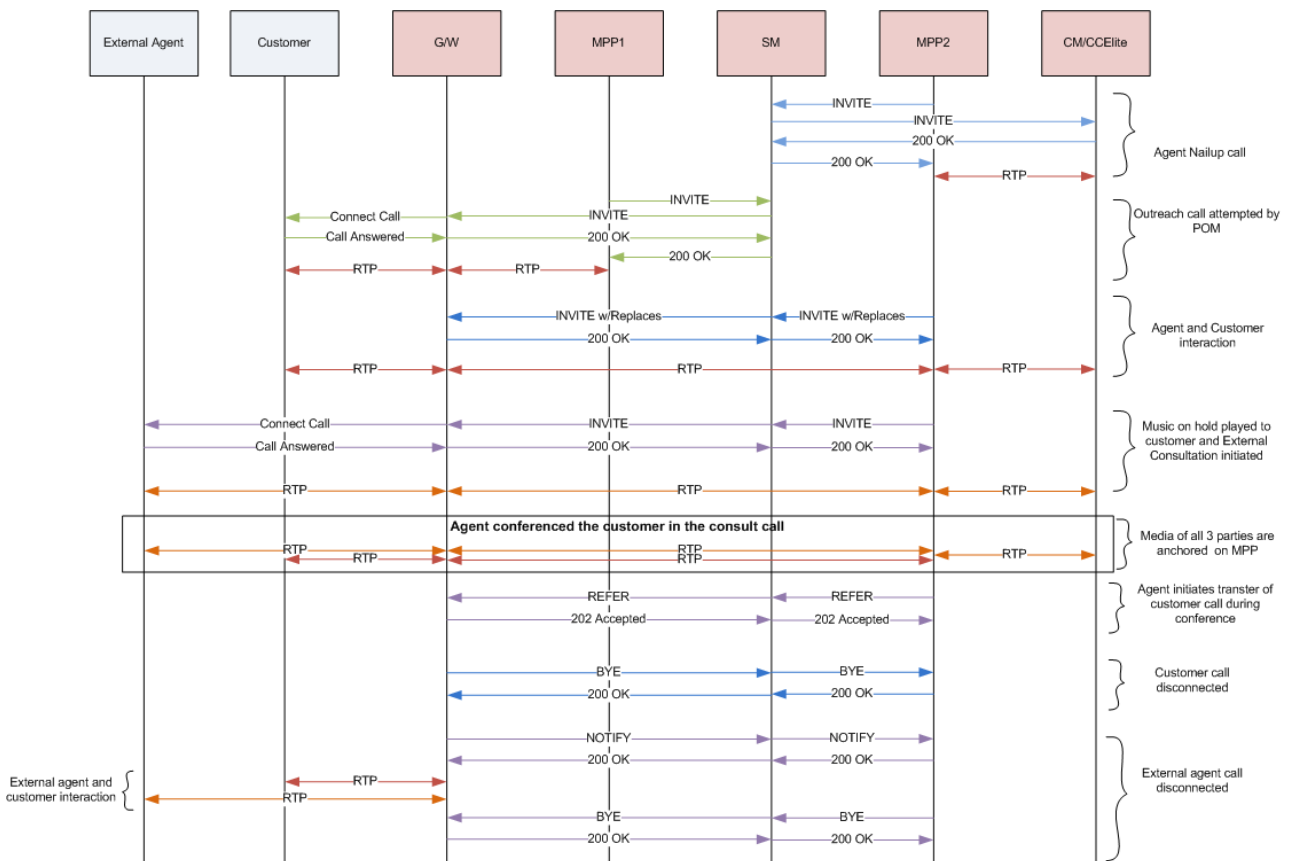


The following steps explain how an agent can transfer a call from a consult in POM:

1. POM instructs MPP2 to launch a nailing call to the agent.
2. MPP2 sends an INVITE message to the agent on Avaya Aura® Communication Manager/ Avaya Aura® Call Center Elite via System Manager. On completion of the INVITE transaction, the agent call gets anchored on MPP2.
3. POM instructs MPP1 to start an outreach attempt to the customer.
4. MPP1 sends INVITE to the customer, which lands on the Gateway via System Manager. The Gateway tries to connect to the customer outside the enterprise.
5. On connecting to the customer, the Gateway completes the INVITE transaction and the customer call gets anchored on MPP2.
6. For the agent-customer interaction, MPP2 initiates an INVITE with Replaces transaction for the customer call leg.
7. This INVITE with Replaces message lands on the Gateway via System Manager. The Gateway then transfers the customer call leg to MPP2.
8. The agent and customer start interacting as their RTPs are processed by MPP2.
9. When the agent wants to consult an external agent, POM asks MPP2 to call the external agent.

10. MPP2 starts MusicOnHold application on the customer leg and sends INVITE message to the external agent which lands on the Gateway via System Manager. The Gateway tries to connect to the external agent.
11. On connecting to the external agent, the Gateway completes the INVITE transaction and the external agent call gets anchored on MPP2.
12. During the consult, the agent can transfer the customer to an external agent for which, POM instructs MPP2 to send a REFER message to the external agent. The REFER transaction contains customer call information in the Refer-To header.
13. This REFER message lands on Gateway via System Manager and replies back with **202 Accepted**. The Gateway then drops the customer call leg towards MPP2 by sending a BYE message.
14. Since the Gateway anchors the customer and the external agent call legs outside the enterprise, it merges them together.
15. The Gateway sends NOTIFY messages to MPP2 via System Manager to notify the successful transfer. MPP2 drops the external agent call leg by sending a BYE message to the Gateway. As a result, the customer call gets disposed from the POM system, whereas the customer and external agent interaction can continue.

## External transfer from a conference



The following steps explain how an agent can transfer a call from a conference in POM:

1. POM instructs MPP2 to launch a nailing call to an agent.
2. MPP2 sends an INVITE message to the agent on Avaya Aura® Communication Manager/ Avaya Aura® Call Center Elite via System Manager. On completion of the INVITE transaction, the agent call gets anchored on MPP2.
3. POM instructs MPP1 to start an outreach attempt to the customer.
4. MPP1 sends an INVITE message to the customer which lands on Gateway via System Manager. Gateway tries to connect to the customer outside the enterprise.
5. On connecting to the customer, the Gateway completes the INVITE transaction and customer call gets anchored on MPP2.
6. For the agent-customer interaction, MPP2 initiates an INVITE with Replaces transaction for the customer call leg.
7. This INVITE with Replaces message lands on the Gateway via System Manager. The Gateway then transfers the customer call leg to MPP2.
8. The agent and customer start interacting as their RTPs are processed by MPP2.
9. When the agent wants to consult an external agent, POM asks MPP2 to call the external agent.
10. MPP2 starts MusicOnHold application on the customer leg and sends an INVITE message to the external agent which lands on the Gateway via System Manager. The Gateway tries to connect to the external agent.
11. On connecting to the external agent, the Gateway completes the INVITE transaction and the external agent call gets anchored on MPP2.
12. If during consult, the call agent wants to conference customer, then POM instructs MPP2 to stop MusicOnHold application and merge all the three call legs. As a result, they can talk to each other as their RTP streams are merged/mixed by MPP2.
13. During conference, the agent can transfer the customer to the external agent for which, POM instructs MPP2 to send REFER message to the external agent. The REFER message contains the customer call information in its Refer-To header.
14. This REFER lands on the Gateway via System Manager and it replies back with **202 Accepted**. The Gateway then drops the customer call leg towards MPP2 by sending a BYE message.
15. Since the Gateway anchors the customer and the external agent call legs outside the enterprise, it will merge them together.
16. The Gateway sends NOTIFY messages to MPP2 via System Manager to notify the successful transfer. MPP2 drops the external agent call leg by sending a BYE message to the Gateway. As a result, the customer call gets disposed from the POM system, whereas the customer and the external agent interaction can continue.

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