

Mitel Phone Manager Outbound Quick Start Guide

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QUICK START GUIDE



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1 Overview

This document provides information for a basic installation of Mitel Phone Manager Outbound and outlines the stages involved in implementing an outbound dialing solution. Phone Manager Outbound can be installed quickly for simple applications but can require a significant amount of project implementation time if integration with a customer's CRM system is required. This often depends on the capabilities of the end user's IT support staff.

Much of what needs discussing with the end customer when implementing a dialer solution revolves around data management and the setup of disposition codes and the user's experience. These vary by customer depending on the dialing application although the Phone Manager Outbound software contains the same amount of work to get up and running.

At the end of this document is a check list of items that should be covered as part of a Phone Manager Outbound implementation.

This document is designed to be a reference during installation. For more information on any of the topics covered please reference the Mitel Phone Manager Outbound Technical Manual.

2 Software Installation

Mitel Phone Manager Outbound is installed and licensed via the Mitel Communication Service and is available in version 4.2 or higher. The following section outlines the server requirements for a Phone Manager Outbound implementation.

Server Requirements

Phone Manager Outbound is an embedded feature of the Mitel Communication Service. Whichever server is running the MCS installation must meet the requirements of the Phone Manager Outbound solution.

Operating System Requirements

- Windows 7, 8.1, 10 (Professional, Enterprise) 64-bit.
- Windows Server 2008 R2, 2012 R2, 2016 (Standard / Enterprise / Datacentre) 64-bit.
- VMWare & Hyper-V Environments Supported.

Hardware Requirements

To use Phone Manager Outbound, the server running MCS must meet or exceed the equivalent of the Large System size as outlined in the MCS technical manual:

- CPU: 2 x Intel quad core Xeon @ 3.1 GHz
- RAM: 16GB
- HDD: 100GB + 1GB for each million calls records
- SQL Server: Full
- NIC: 1Gb

MiVoice Office 250 Requirements

Phone Manager Outbound uses an extensive range of features on the MiVoice Office 250 platform and can also put a heavy load on the system's processor when a large number of users are dialing.

The following are a list of features that must be present on the phone system to use Phone Manager Outbound:

Features / Licenses / Software

- System OAI Call Control & 3rd Party Events enabled
- Mitel CT Gateway required for Multi-Node implementations
- Mitel CT Gateway required when more than 3 heavy OAI application are installed on the system (e.g. Operator Console, MCS, MiCC Office)
- MiVoice Office 250 V6 or higher
- Trunk lines with answer supervision

Extension Requirements

- Supported IP handsets: 5312, 5324, 5320, 5330, 5340, 5360, 5304, 6920, 6930, 6940
- Supported digital handsets: 8528, 8568
- Supported Softphones: Phone Manager Desktop (Professional or Team Leader licence required)
- It is compulsory that a compatible headset is also used

Hardware Requirements

- PS-1 is required as per the MiVoice Office 250 engineering guidelines

 In addition to the requirements above, any other operations the telephone system is performing need to be taken into account when specifying the size of phone system required. For example, if the phone system was handling 2,000 inbound calls at the same time as Phone Manager Outbound is making outbound calls then this needs to be taken into account when designing the system.

Licensing & Installation

Phone Manager Outbound is licensed through the Mitel Communication Server (MCS). The MCS must be on version 4.2 or higher to support Phone Manager Outbound. If adding Phone Manager Outbound to an existing MCS implementation then ensure the additional software, hardware and SQL server requirements are met. There is no separate installation for Phone Manager Outbound, all necessary services are installed as part of the MCS installation and just need licensing. Phone Manager Outbound user licenses are consumed on a concurrent basis only when a user is logged in and dialing on a campaign. Each Phone Manager Outbound user requires a Phone Manager Professional or Team Leader license in addition to their Phone Manager Outbound user license before they can login to make calls.

3 Enabling Phone Manager Outbound

Phone Manager Outbound is enabled from the MCS website under the 'Features' section. Phone Manager Outbound is enabled by checking the box in the Phone Manager Outbound section and then applying the change.

The Hunt Group setting need only be configured if the status of the user's Agent ID needs syncing with their Phone Manager Outbound User status (DND, Wrap up etc.). This is useful for monitoring the status of a user on other product such as MiContact Center Office.

By default the Phone Manager Outbound databases will be added to the SQL Server instance MCS is using. This can be changed if required. If changed ensure the target database already exists.

4 Phone Manager Outbound Website

All further configurations are done via the Phone Manager Outbound website. There is a link to this from the MCS website but for reference the format of the URL to access this site is shown below:

[http://\[ServerName\]/CampaignManager](http://[ServerName]/CampaignManager)

The default login credentials for the Phone Manager Outbound website are the same as for the MCS website (Username: engineer, Password: Teleph0ny!).

Supervisor Access

Access to this site will need to be given to supervisors / IT staff on site that will be managing the campaigns on a day to day basis.

Supervisors can be given restricted permissions to limit access to configuration areas as needed in accordance with compliance regulations.

Access to the website is given through Security Profiles on the MCS website. For ease of use it is also wise to implement Active Directory integrated login on the MCS website so that supervisors aren't prompted for a password when they swap between the MCS and Phone Manager Outbound websites.

End User Access

End user access to Phone Manager Outbound is provided through Phone Manager. Permission to access the application is granted through the Phone Manager Client Profiles on the MCS website.

If status syncing is to be used and a hunt group has been configured when enabling Phone Manager Outbound then it is important that each User configured to use Phone Manager Outbound has an Agent ID assigned to them.

5 System Configuration

The following areas all require configuration during the Phone Manager Outbound installation. Information must be gathered from the customer prior to installation to complete much of this configuration. Each area is described below.

Campaigns & Import / Export Definitions

Before any numbers can be dialed campaigns need creating to hold the data. A user can only be assigned to one campaign at a time so make sure this is taken into account when deciding how to store data in campaigns.

Once campaigns have been created then import and export definitions needs to be created to get data into the campaign to dial and then out again once it is completed. The next section contains some example data formats to help get started.

Disposition Codes

Also known as “Result codes” or “Outcome codes”, these codes control the contact strategy for each record in the system and are the most important area that requires configuration. Each call that is made starts with a default ‘135’ disposition code and if answered will automatically be changed to ‘140’. If the call connects, the user of the system should be overwriting the 140 answer code with the actual result of the call (e.g. Answer machine or Customer not interested). The disposition code given to a call will then decide if and when the record should be dialed again along with how long the user should have in wrap up. There is a blank disposition code form to complete at the end of this document.

Once the disposition codes have been created they need to be assigned to each campaign they apply to so that they appear on each users Phone Manager client.

Shifts

Shifts are used for two features on the system, specifying when users are allowed to dial and for recycling calls. A default shift pattern is configured at system level, this will need updating to suite the customer’s requirements. If necessary, it can be overridden at campaign level.

Valid Numbers & Regional Settings

Whichever region Phone Manager Outbound is installed in there is a configurable dial window that can be configured. This is a back stop that outlines when it is valid to dial numbers in a region. Ensure these are configured to allow dialing in the times the customer requires but make sure any regional regulations on dialing at unsociable times are adhered to.

Barred Number Tables

Barred number tables are used to filter out records during an import that should not be called. This is particularly important when cold calling due to regulations and the TPS database. In addition to national ‘Don’t Call Lists’ like the TPS database the customer may also have their own barring lists of problem customers that need to be loaded into the system. Once barring tables are created they can be grouped together and assigned to campaigns to ensure they are filtered against during data imports.

Calling Party Numbers

When making call Phone Manager Outbound can present a calling party number that is either configured at system, campaign or record level. Make sure the CPNs to be presented are configured correctly.

Email Groups

Email groups are used throughout the application as the targets for notifications regarding:

- Disposition entry
- Imports
- Exports
- Schedules

Email groups for all necessary recipients needs to be created.

6 Import Data Format Example

Phone Manager Outbound imports a flat file usually in CSV format to populate a campaign. Fields within an import file can be in different orders. Phone Manager Outbound provides a way to map the fields being imported to the campaign fields but for ease of use it is simpler if the import file is presented in the following order:

1. Telephone 1
2. Telephone 2
3. Telephone 3
4. Field1
5. Field2
6. Field3 Field30

Each record import can have up to 3 different telephone numbers. If a record has less than 3 telephone numbers then simply leave a blank field and it will be skipped during import (or configure the field mapping correctly in the import definition).

Duplicate Records

In its default configuration Phone Manager Outbound will remove duplicate numbers based on the telephone number being imported. Duplicate numbers will only be checked inside the campaign and not system wide.

7 Testing

Once the basic configuration of the system has been completed it is important to create a test campaign that contains a test number(s) and run through testing that the system is performing as required.

When importing test data it is useful to enable duplicate numbers so that tests can be repeated without having to constantly re-import data.

Recommended Tests

The following tests are recommended as a minimum when commissioning a Phone Manager Outbound solution. The tests require that a test campaign has been created with some test data and that a Phone Manager client is connected with a user that has been assigned to the test campaign.

Disposition Entry

Open the Phone Manager Outbound form within Phone Manager and press login to make calls.

1. Confirm the disposition codes appear as configured for the test campaign.
2. Make a series of calls testing each disposition making a note of the dispositions entered.
3. Check the wrap up is correct after each call.
4. Log out and check the Campaign View on the website and cross reference against the disposition codes entered to make sure they are all configured correctly in regard to contact type & strategy.

Valid Numbers

Define an import with some invalid numbers, numbers that should not be allowed into the campaign such as premium rate numbers. Test importing the data to confirm they do not get imported.

Barred Number

If a barred number table/group has been created then assign it to the test campaign and test importing data that is known to be barred. Ensure it is not imported into the campaign.

8 Installation Checklist

The following section should be completed during installation to ensure all major areas are configured.

Area	Item	Completed / Information
MCS Configuration	Licensed	
	Enabled	
	Supervisors configured	
	Phone Manager users configured	
	Agent IDs programmed against PM users if required	
	Dial plans configured on MCS	
Phone Manager Outbound Setup	Campaigns created	
	Import / Export Definitions created	
	Disposition codes configured (completed the disposition code form)	
	Dispositions assigned to campaigns	
	Shift Times modified	
	Valid numbers & Regional settings	
	Barred number tables created	
	Calling Party Numbers configured	
	Email Groups created	
Testing	Disposition entry	
	Valid numbers	
	Barred numbers	

9 Disposition Form

The following form should be completed with the disposition codes required for the Phone Manager Outbound implementation. These codes will then be configured on the system upon installation. Disposition codes can be added / modified / deleted after the initial configuration and can be overridden at campaign level if required. The items shown are system codes that come pre configured.

Code	Description	Wrap Up (secs)	Contact Type	Contact Strategy	Advanced Options
134	System Stopped	5	Unanswered	Recycle - Shift	N/A
135	No Answer (default)	0	Unanswered	Recycle - Shift	N/A
136	Busy (Engaged)	0	Unanswered	Recycle - 5 mins	N/A
137	Logout on call	0	Unanswered	Recycle - Shift	N/A
138	Invalid Number	0	Unanswered	Completed	N/A
140	Call Answered	5	Answered	Recycle - Shift	N/A

Key

Contact Type: On answered calls this outlines whether it was an automated answer (voicemail), wrong or right party contact.

Contact Strategy: What should happen to the call next? Recycle, call-back or mark as completed. If completed make a note of whether it was a conversion or not (a successful call).

Advanced Options: Make a note of any of the advanced options available. For instance, does the next telephone need to be dialed or should the call be cleared upon disposition entry.



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