Campaign

Administrator's Guide

October 2026

Learn how to create, configure, and manage outbound, inbound, and autodial campaigns.

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About Five9

Five9 is the leading provider of cloud contact center software, bringing the power of the cloud to thousands of customers and facilitating more than three billion customer interactions annually. Since 2001, Five9 has led the cloud revolution in contact centers, delivering software to help organizations of every size transition from premise-based software to the cloud. With its extensive expertise, technology, and ecosystem of partners, Five9 delivers secure, reliable, scalable cloud contact center software to help businesses create exceptional customer experiences, increase agent productivity and deliver tangible results. For more information visit www.five9.com.

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What's New

Release	Change	Topic
Oct 2026	Added the early adopter note to Maximum Number of Outbound Lines in Outbound Campaign General Properties.	Outbound Campaign General Properties
Sep 2026	Updated topics to include lead ownership routing.	Preview Dialing Mode Summary of Dialing Mode Features
	Updated importing scripts steps to provide more detail.	Importing Scripts
Jul 2026	Clarified that outbound campaign dispositions can be restored to default only when in Preview Dialing mode.	Editing Dispositions for Each Campaign
Jun 2026	Added guidance on campaign priority behavior across dialing modes and clarified recommended minimum agent levels (10 for Preview, Power, Progressive; 15 for Predictive).	Preview Dialing Mode Power Dialing Mode Progressive Dialing Mode Predictive Dialing Mode
	Added Suppress Out of Numbers Alerts that enables administrators to configure a duration to temporarily suppress notifications when starting or restarting campaigns.	Outbound Campaign General Properties
Apr 2026	Added an important note that call screening on iOS 26 runs per call and might not trigger for every unknown caller.	Configuring Call Analysis for Outbound and Autodial Campaigns
Mar 2026	Added an instruction to customers to contact their Five9	Outbound Campaign General Properties

Release	Change	Topic
	representative to request access to the Maximum Number of Outbound Lines feature.	
	Clarified that the call screening feature supports only American, British, and Australian English Siri voices, supports iPhones on iOS 26 with Apple's call screening enabled, and doesn't support Google Pixel devices.	**Configuring Call Analysis for Outbound and Autodial Campaigns**

Types of Campaigns

The following lists the different types of campaigns in Five9.

Outbound Campaigns
Inbound Campaigns
Autodial Campaigns
- Autodial Information in Reports
- Telemarketing Rules
- Types of Autodial Campaigns
- Campaign Profiles for Autodial Campaigns
- Dispositions for Autodial Campaigns
- Testing Autodial Campaigns

Outbound Campaigns

Outbound campaigns are used to dial customers in lists that you create and to deliver the calls to the agents that process the calls. The dialing process is typically handled by the dialer. Outbound campaigns may use one of four dialing modes: the predictive, power, or progressive dialer modes to dial through a list of contacts and deliver connected calls to your agents. An additional preview dialing mode allows agents to preview contacts and individually dial their numbers. For more information, see **Configuring Dialing Modes, Options, and Call Processing in Outbound Campaigns**.

When managing outbound campaigns, you must understand how the dialer works and how lists are processed. For more information, see **Understanding the Dialer in Outbound Campaigns**.

Inbound Campaigns

Inbound campaigns are used to receive customer calls coming from a DNIS. The calls are processed according to your rules in the IVR script of the campaign. With the inbound campaign, you can use customized greetings and create different scenarios for

Interactive Voice Response (IVR). Automated call routing of customer inquiries is used to transfer calls to the most appropriate agents:

- Incoming calls can be sent to agents based on availability or skill with custom prompts and hold music.
- You can create loops and branching. You can collect caller information.
- You can use contact data.
- If queue times are long or agents are unavailable, callers can leave a message.
- Calls can be forwarded to a third party when agents are not available.
- You can prioritize inbound call traffic. etc.

To create IVR scripts that automate skills-based call routing, see *Routing Users to Skill Groups* in the Interactive Voice Response (IVR) Administrator's Guide.

The campaign must be running to answer inbound calls. Otherwise, callers hear a busy signal.

Autodial Campaigns

Autodial campaigns are designed to dial phone numbers in a list and to use call-progress detection to understand whether the call was received by an answering machine or person. When a call is answered, it follows a predefined IVR Script. The most common flows include leaving messages to the called party. You can also optionally configure the auto-dialer so that your customers can interact with a menu of options and messages, and even allow them to add their phone number to the do-not-call list without interacting with an agent. So, with Five9's advanced capabilities you can define many different flows to meet your business needs. And each successfully connected number will follow the call flow defined for the campaign. The call flow can even pass an outbound call to an agent.

When one of your customers needs to talk to a live agent, the call can be queued up for the next available agent. When your agents are connected to live parties, they can follow the scripts you've written and record the results in the Five9 contact history.

Autodial Campaigns can dial multiple numbers at the same time based on the number of lines available for your account and the number of lines allocated to the campaign. There is an ability to stop dialing based on agent availability.

If your call flow does not have the possibility to deliver calls to agents, you need to consider only running it at the times when you want to deliver your messages to your customer base. You can either manually start and stop campaigns or use a profile to help you in delivering your messages at targeted times.

Autodial Information in Reports
Telemarketing Rules
Types of Autodial Campaigns
Campaign Profiles for Autodial Campaigns
Dispositions for Autodial Campaigns
Testing Autodial Campaigns

Autodial Information in Reports

To determine if a contact hangs up before listening to the entire message, check the total length of the call in reports. If the call is shorter than the length of your message, you know the contact hung up before the message completed. You could also verify the path in the IVR flow that the customer took by creating a report and looking at the `ivr_flow` column.

To view the IVR path taken for each autodial call, look at reports, which may contain an `ivr_flow` column. This column shows the IVR modules used by the call. Because the `ivr_flow` field uses the module name, Five9 recommends to identify each step of the call flow by naming each module accordingly.

Telemarketing Rules

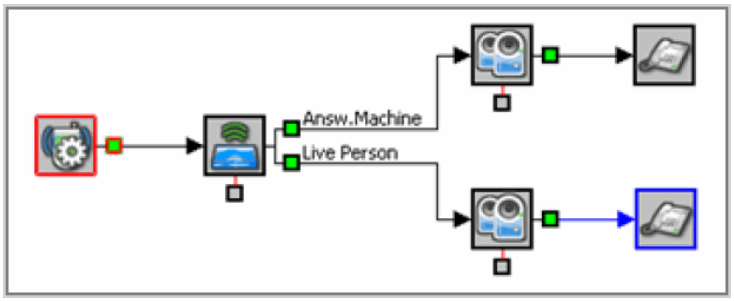
> **Important:** You are responsible to know and comply with the telemarketing regulations in the regions in which you operate. Consult your compliance team if you are not sure about applicable laws.

In the U.S., autodial campaigns are governed by the Federal Trade Commission's telemarketing sales rule. You may not use an autodialer for telemarketing purposes. You may use an autodialer only if you have an existing business relationship with the people you are calling. For example, they may be used for collections, feature announcements, reminders to existing customers, or for exempt organizations, such as charities or political campaigns. For more details, a copy of the telemarketing sales rule can be found online at the Federal Trade Commission's Telemarketing Sales Rule Web site.

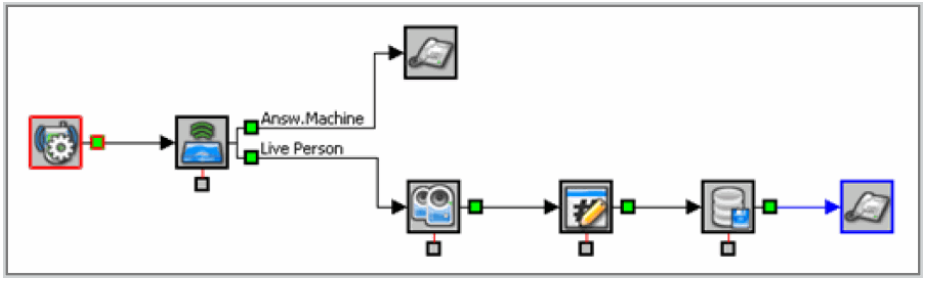
Types of Autodial Campaigns

Autodial campaigns comprise these categories:

- **Basic Autodial Campaign**: Plays a message to answering machines. The message in the Play modules can be the same or different.

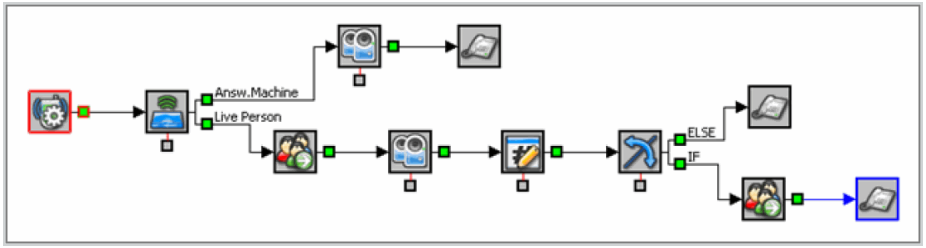


- **Smart Autodial Survey**: Plays a prompt to the connected party and records the response in a contact field. If an answering machine is detected, the system disconnects the call. See Configuring Autodial Agent Linkback Campaigns.

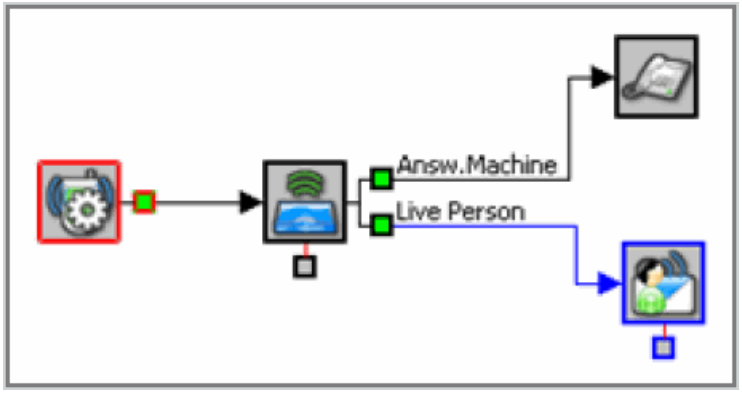


- **Automated message delivery campaigns**: Plays a recorded message to persons and answering machines, for example to broadcast a recorded message.

- **Agent Linkback**: Usually plays a recorded message to answering machines but gives persons the option to connect to an agent.



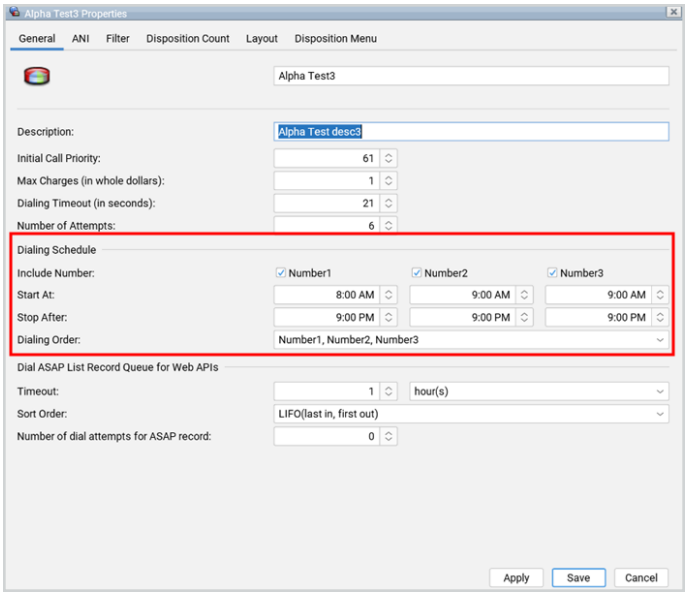
- **Autodial Campaign to Record a Response in Voice mail**: The Voicemail Transfer module plays a greeting providing instructions to the contact and asks to record the response.



Campaign Profiles for Autodial Campaigns

All campaign profile features can be used with autodial campaigns. For example, you can use a campaign profile to start and stop dialing automatically, based on the time of day. Use the Start At and Stop After settings to set the start and stop times. You can adjust more settings by using profiles.

In the example below, the campaign dials between 8AM and 9PM to phone numbers in the number1 contact field of list records. Remember to account for time zones, as the dialing hours are based on the time zone of the phone number being dialed, not your local time zone.



See **Outbound Campaign General Properties**.

Dispositions for Autodial Campaigns

Because many autodial calls do not reach an agent, to be assigned a disposition, autodial campaigns can record a disposition in some IVR modules. The purpose of IVR dispositions is to provide reporting of where the call disconnected in the IVR flow. For example, your autodial campaign plays a message when a person answers and disconnects the call with the Hang Up module. The disposition in the Hang Up module is recorded as the result of the call. In this case, the disposition for the Hang Up module can be *message left - person*.

Autodial campaigns have two disposition categories:

- Agent dispositions are used when a call is connected to a Five9 agent.
- IVR dispositions are used by the system when a call is disconnected during the IVR flow.

To determine which IVR dispositions are required, create an IVR flow first, and add the dispositions as needed. You can also use the default dispositions assigned by the system. All IVR dispositions have the same configuration options as agent dispositions. Features such as Send Email Notification and Add to DNC are available.

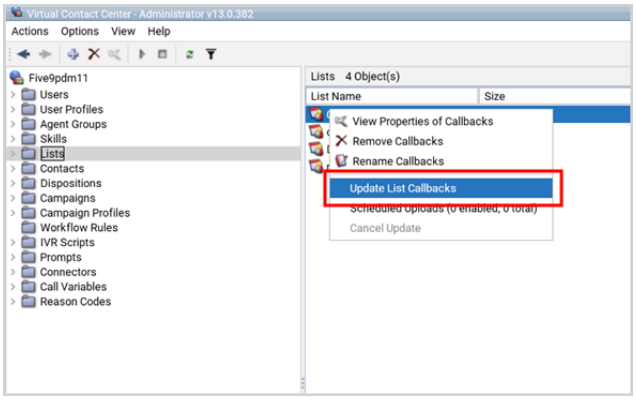
Agent Must Confirm, *Agent Must Complete Worksheet*, and *Worksheet Cannot Be Used With This Disposition* are configuration options that apply only if the call reaches the agent. They do not apply to IVR Dispositions.

Testing Autodial Campaigns

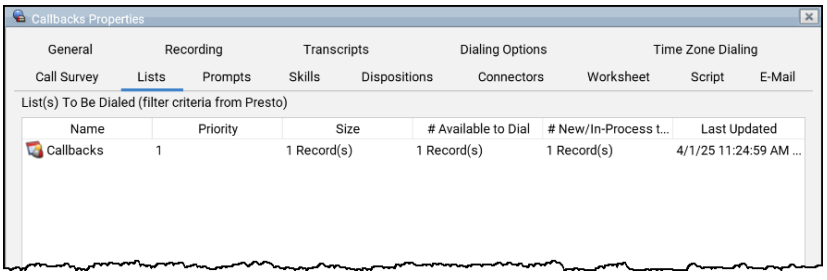
Before running an autodial campaign, Five9 recommends that you test the campaign.

1. Upload a list of known test numbers, such as your office number, your cell phone, your home number, and co-workers' phone numbers.

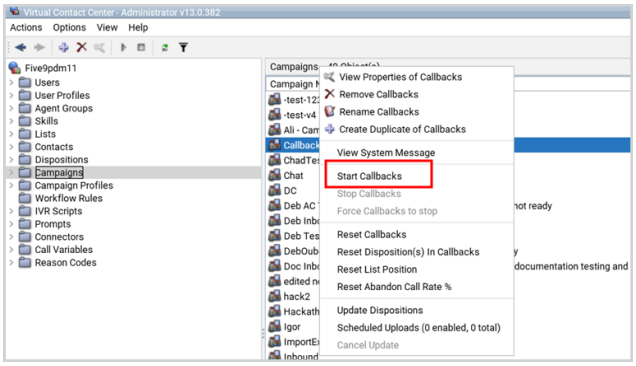
   For more information, see Importing and Updating Call Lists in the Basic Configuration Administrator's Guide.



2. Assign the test list to the autodial campaign in the same way as for outbound campaigns.



3. Run the campaign with the test list to be sure messages are played as expected.



4 Test the campaign by answering some of the calls and going through the IVR script, allowing some calls to go to voice mail.

Creating Campaigns

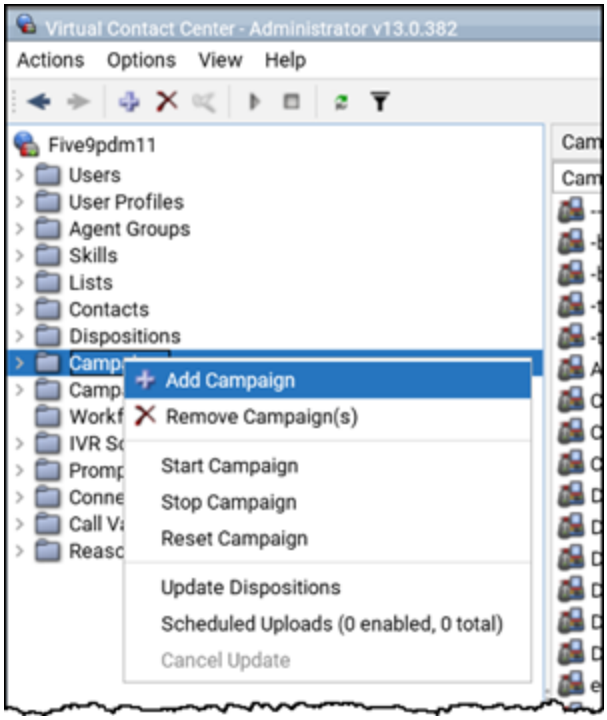
Duplicating Campaigns
Renaming Campaigns
Managing Campaigns
Troubleshooting Campaigns in VCC Admin

Before creating campaigns, be sure that you have prepared the components required to configure the campaigns:

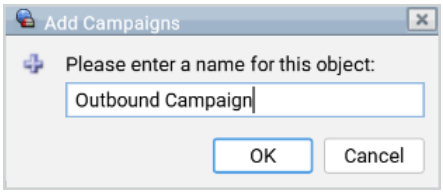
Type of Campaign	Requirements
Outbound	• Skill groups • Users, user profiles, and agent groups • Imported one or more lists • Adjusted system dispositions or created custom dispositions
Inbound	• Skill groups • Users, user profiles, and agent groups • Adjusted system dispositions or created custom dispositions
Autodial	• Skill groups • Users, user profiles, and agent groups • Adjusted system dispositions or created custom dispositions • Created call lists • Created IVR scripts If your autodial campaign will not transfer calls to agents, you do not need users or skill groups.

1 Right-click **Campaigns**, and then select **Add Campaign**.

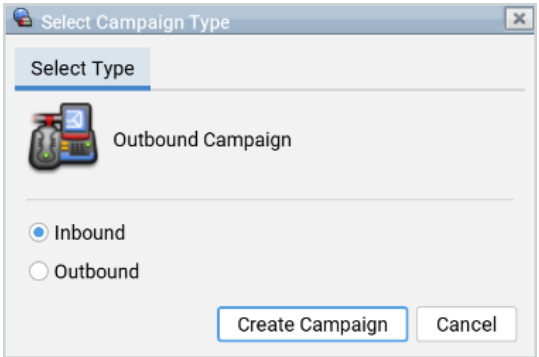
You can also click the **Campaigns** folder, and then click **Add Object** ( ).



2 Enter the name for the new campaign, and click **OK**.



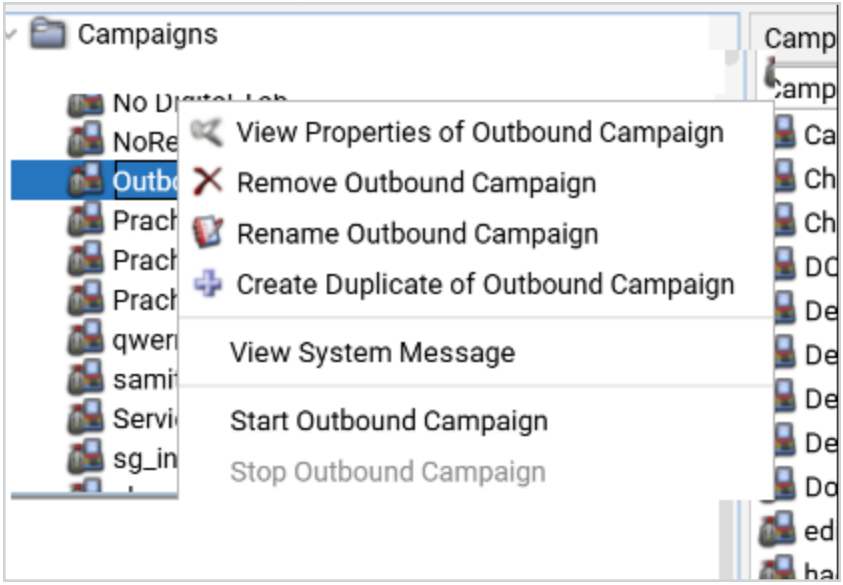
3 Select the type of campaign: Outbound, Inbound, or Autodial.

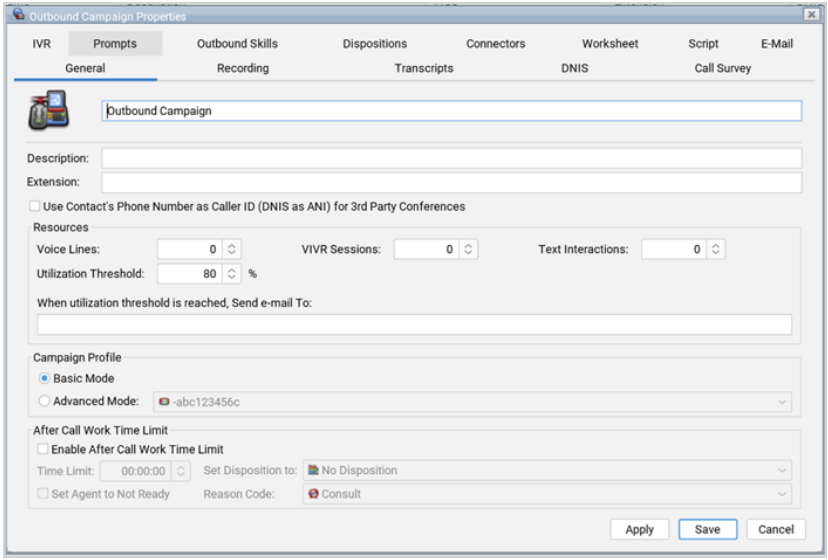


4 Click **Create Campaign**.

The new campaign is added to your Campaign folder.

5 To open the campaign properties, right-click the campaign name and select **View Properties of <campaign name>**, or double-click the campaign name in the list.

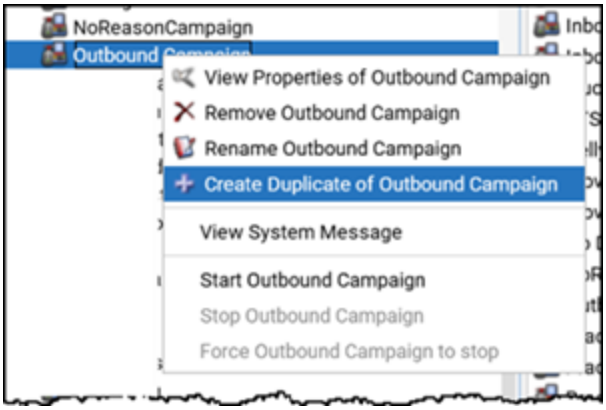




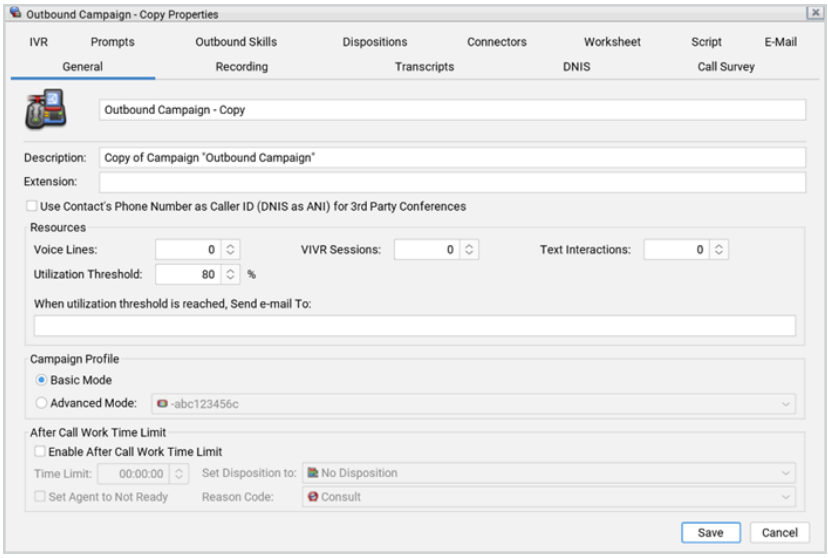
Duplicating Campaigns

You may create a new campaign by copying an existing campaign. For outbound and autodial campaigns, all the campaign information is copied to the duplicate. For inbound campaigns, the campaign information is copied to the duplicate, except for the extension and the DNIS.

1 Right-click a campaign, and select **Create Duplicate of <campaign name>**.



The property window of the duplicate campaign opens, showing the name in this format: **<original object name> - Copy Properties**.



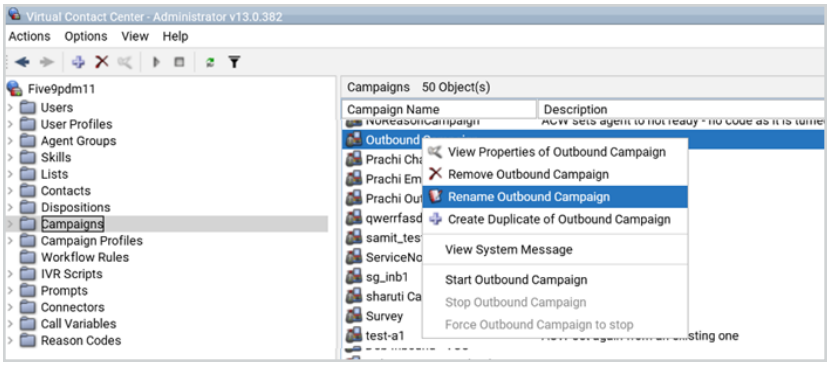
2 Make your changes to the duplicate, and click **Save**.

Renaming Campaigns

Follow these steps to change the name of an existing campaign.

1 Right-click a campaign, and select **Rename**.

You can also click the **Campaigns** folder and click **Add Object** ( ).

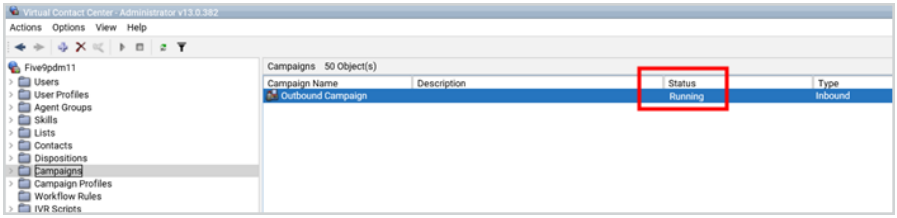


2 Enter another name, and click **OK**.

Managing Campaigns

Starting Campaigns
Understanding Campaign Current Actions
Stopping a Campaign
Resetting Campaigns

Campaign status is indicated in the main pane:



Campaign State	Description
Running	An outbound campaign must be running to dial your list and send calls to agents.
Not Running	The campaign is not running.
Starting	After a domain host is restarted (after a maintenance downtime), campaigns that were previously running may take some time to start running again.
Stopping	A campaign may be in this state if a user attempts to manually stop a running campaign while there are still active calls to or from the campaign. Using Force Stop immediately disconnects all calls and puts the campaign in the Not Running state.

You can start an outbound campaign in one of these modes:

- Basic
- Advanced
- Training

Starting Campaigns

An outbound campaign must be running for you to be able to dial your list of numbers and send calls to agents. When the campaign is running, it does not start dialing until there is at least one agent available to take calls.

A running outbound campaign does not start dialing until at least one agent is available to take calls. If the campaign runs out of numbers to call, the Current Action column contains Waiting for Available Numbers. The campaign remains in a running state. If numbers are activated later (for example, due to dialing restrictions that no longer apply or new list records being added), the campaign starts dialing immediately if agents are available.

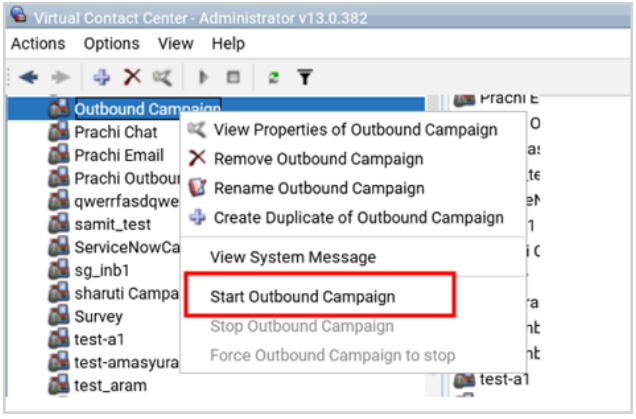
The running inbound campaign answers and follows your IVR script when dialing the phone number selected in the DNIS tab. After an autodial campaign is started, it begins dialing depending on the **Agent Availability** option defined in Dialing Options of the campaign properties. You can use Workflow Rules to start the campaign automatically when defined conditions are true.

Starting a Selected Campaign

1 Click or open the **Campaigns** folder.

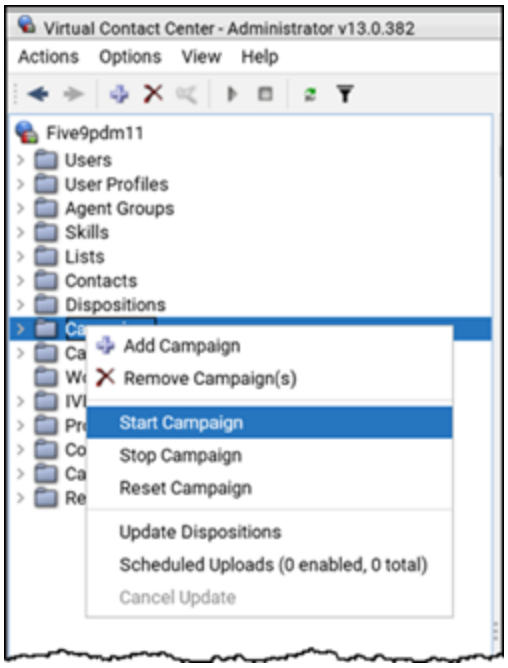
2 In the navigation pane or in the main pane, right-click a campaign, and select **Start <campaign name>**.

In the main pane of the VCC Administrator's console, the campaign status changes to Running. Both methods are shown here:

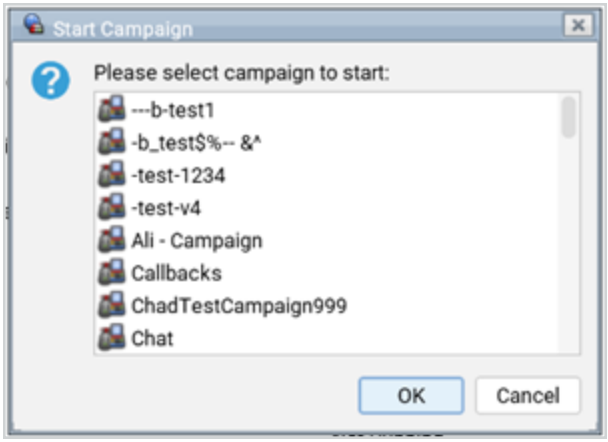


Starting a Campaign

1 Right-click the **Campaigns** folder, and select **Start Campaign**.



2 In the list that appears, select a campaign.

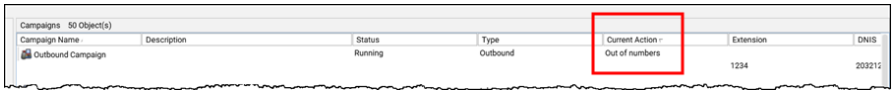


3 Click **OK**.

The campaign status changes to **Running**.

Understanding Campaign Current Actions

Your campaigns and their current actions are available in your VCC Administrator and Supervisor applications under the **Current Action** column.



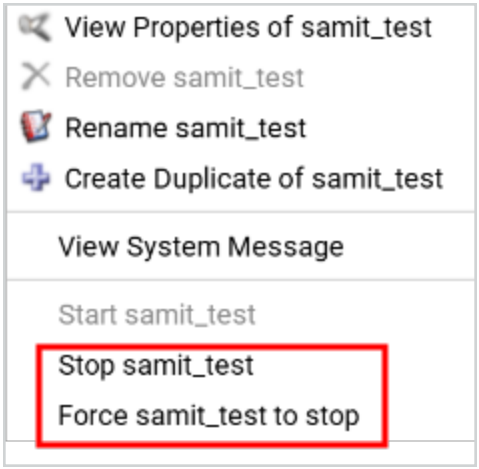
The following table describes the possible campaign actions.

Campaign Action	Description
Dialing	Campaign is currently dialing.
Waiting for available agents	Campaign is currently unable to make calls because no agents are available. Some calls may still be dialing, in queue, or assigned to agents.
Waiting for numbers	Campaign is currently unable to make calls because no numbers (contact records) are available to dial. Some records may become available later as reminders expire. Some calls that are currently may still be dialing, in queue, or assigned to agents.
Waiting for resources	Campaign is currently unable to make calls because no outbound domain lines or autodial campaign lines are available. Some calls may still be dialing, in queue, or assigned to agents.
Outbound calls are not allowed	Outbound calls are not allowed at the moment. For example, automatic calling is not allowed for a state/province. Some calls may still be dialing, in queue, or assigned to agents. See **Dialing Rules** for more information.
Out of numbers	Campaign can make no calls because no numbers (contact records) are available to dial. No contact records will appear in the future without changing the data, such as adding additional records to the dialing lists or changing the campaign settings or changing some records to satisfy the campaign filters.

Stopping a Campaign

You can stop a campaign in one of these ways:

- **Normal stopping**: waits for all active calls to end before stopping. The length of time it takes for the campaign to stop depends on how long the active calls take to complete.
- **Immediate stopping**: stops dialing numbers immediately and disconnects all calls in process.
- **Automatic stopping**: stops automatically when long distance charges are inadequate, the maximum configured number of dispositions in the campaign profile is reached (see Campaign Profiles in the Basic Configuration Administrator's Guide), the campaign runs out of numbers to dial, and a workflow rule is triggered (see Managing Disposition Counts in the Basic Configuration Administrator's Guide).



You can create a workflow rule for the case when campaign is stopped. You can use the Workflow Rules to stop the campaign automatically when the certain conditions (events) are true.

Stopping a Campaign Normally

Stopping a campaign allows all active interactions to finish. Once you stop the campaign, no new interactions begin.

1. Click to expand **Campaigns** in the navigation pane.
2. Right-click a campaign name, and select **Stop <campaign name>**.
3. Click **Yes**.

   The campaign status changes to **Not Running**.

Stopping a Campaign Immediately

When you stop a campaign immediately, all dialing of numbers ceases and all active calls are disconnected.

1. Click to expand **Campaigns** in the navigation pane.
2. Right-click a campaign name, and select **Force <campaign name> to stop**.
3. Click **Yes**.

   The campaign status changes to **Not Running**.

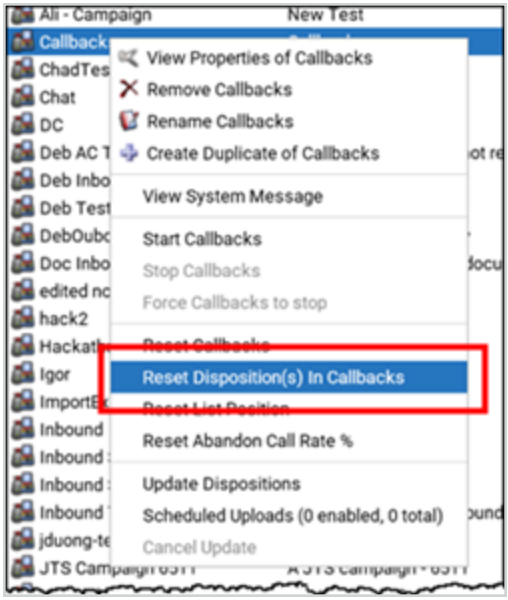
Stopping a Campaign According to Charges or Dispositions

You can stop a campaign according to the long distance charges or number of dispositions selected in the Profile. See Managing Campaign Dispositions

Resetting Campaigns

This feature forces campaigns to redial every number, except for Do Not Call numbers. Resetting dispositions for a campaign applies only to the lists used in the campaign.

To reset only some dispositions, select **Reset Disposition(s) in <campaign name>**.

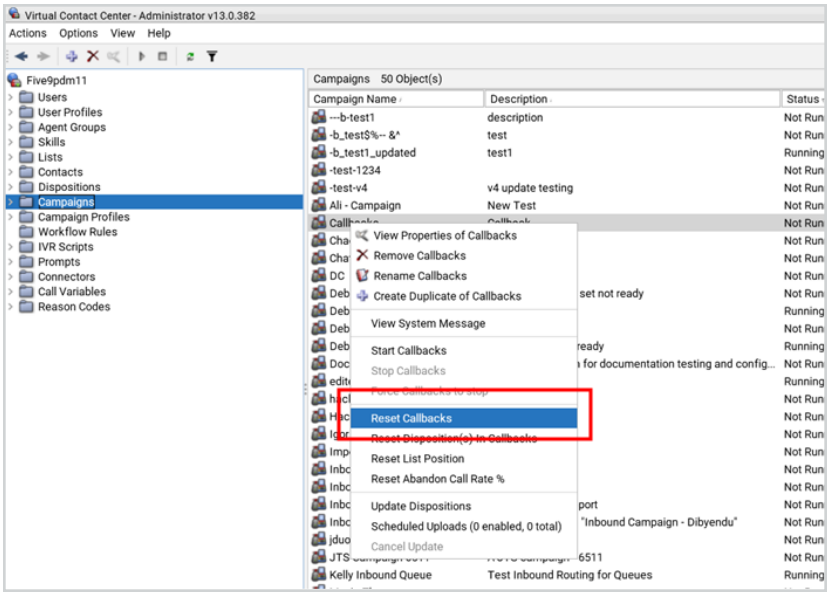


Warning

This feature erases all dialing results and some reporting information.

1 Click the **Campaigns** folder.

2 Right-click a campaign name, and select **Reset <campaign name>**.



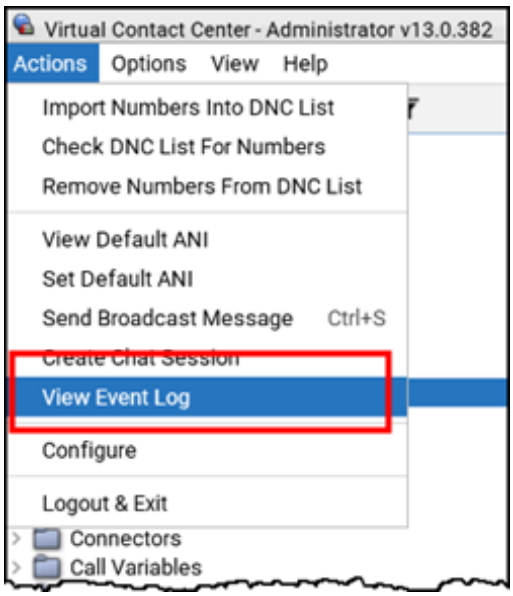
3 Click **Yes**. Campaign completion is reset to 0%.

Troubleshooting Campaigns in VCC Admin

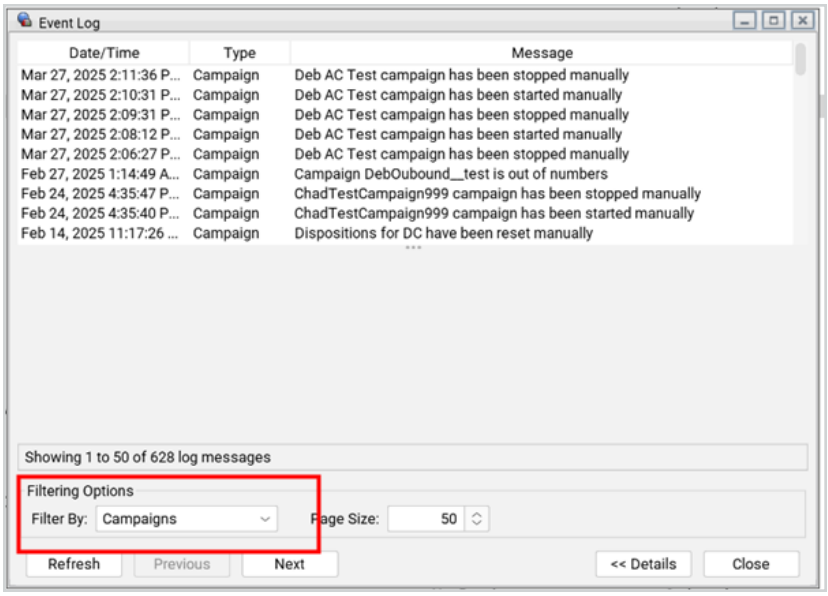
Troubleshooting Campaigns in Admin Console
Troubleshooting Outbound Campaigns
Troubleshooting Inbound Campaigns

You can see some types of information about campaigns by viewing the event log.

1 In the VCC Administrator application, click **Actions**, and then select **View Event Log**.

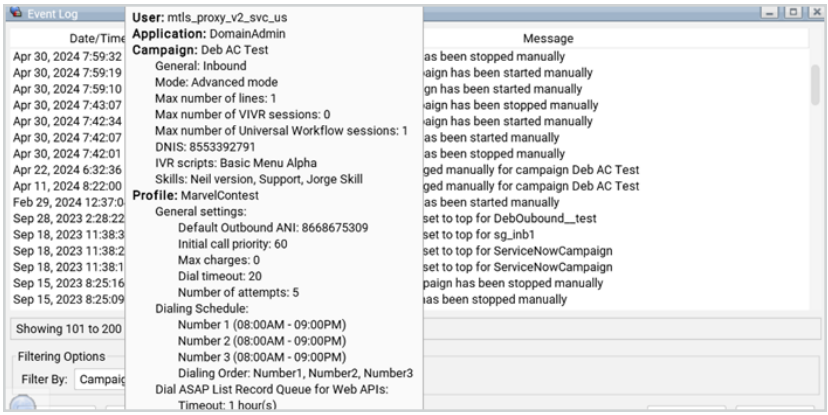


2 In the **Filter By** dropdown, select **Campaigns**.



3 Select a row in the event log.

4 To see the details about an event, hover over it or click **Details** at the bottom of the window.



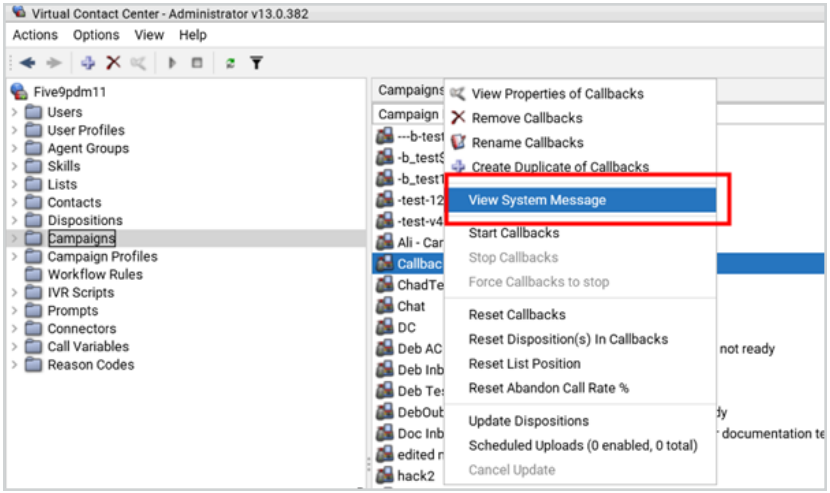
Troubleshooting Campaigns in Admin Console

You can access configuration events by selecting the **Configuration Events** on the home page or **Manage Environment** in the left navigation. To troubleshoot campaigns, see *Configuration Event Log* in the Administrator Console Administrator's Guide.

Troubleshooting Outbound Campaigns

Agents not receiving calls from outbound campaign.

- **Are agents logged in and ready?.** Check with your agents to ensure they are logged in and in Ready Call status.
- **Are agents in the proper skill group?.** The skill groups determines which agents receive calls. Check the agent's skill group from the properties of the user account. Click the Skills tab in the campaign to determine which skill groups it is using. See also, **Managing User Definitions** in the Basic Configuration Administrator's Guide.
- **Is the campaign running?.** The outbound campaign must be running to dial and deliver calls to agents. In the Campaigns folder, there is Status column where you can see if the campaign is running. If the campaign is not running, right-click the campaign and choose Start. See **Starting Campaigns**.
- **Is the campaign running out of numbers or processing calls that are not answered?.** The campaign stops if it runs out of numbers. Right-click the campaign and select **View System Messages** to see if the campaign is out of numbers.



It is possible the dialer is processing a lot of numbers that are not connected (busy, no answer). To check the status of the dialer, run the Call Log reports. When you run the report, do not choose any users and do not choose any dispositions. This allows you to see calls processed by the system.

Check the Result column for calls with the User name [None]. These calls did not reach an agent. You can see blocks of time where the dialer was busy processing calls that did not reach an agent. It takes at least twenty seconds, by default, to

process a *no answer* call, due to ring time.

Same contacts are called multiple times.

- **Are you using the redial disposition?.** Redial dispositions instruct the dialer to call the phone number again. If the dialer is near the end of a list, or if a redial timer is configured for a short, the number may be redialed again in a short time.

  Try replacing dispositions redial dispositions (especially those with timers) with ones that do not. You can use the Reset Dispositions to redial numbers based on disposition rather than allowing the dialer to control when the number is redialed.

  As a rule, use a redial dispositions only when the agent does not speak to anyone or if a contact asked to be called again.

- **Are you resetting the campaign?.** The Reset Campaign feature instructs the dialer to redial every number again (with the exception of Do Not Call numbers). Normally you should not use the Reset Campaign feature. Use the Reset Dispositions option instead. See also, Renaming Campaigns.

Contact Hangs up Before Reaching an Agent.

- **Are you performing call analysis (answering/fax machine detection)?.** If using Fax and Answering Machine Call Analysis in the properties of the Outbound Campaign, be sure to set the Voice Detection Level to Fast. A setting above Fast allows for a longer delay after the person says Hello, which could account for the hang-ups.

  If you still get hang-ups when using the Fast setting, try turning off Call Analysis.

Contact Hangs up Immediately After Reaching an Agent.

- **Agent not responding quickly enough.** Be sure agents start their greeting as soon as the Incoming Call screen appears. The contact has already answered so the agent should not wait to hear a hello but should start speaking immediately.

High Dropped Call Rate.

- **Check the calls-to-agent ratio in campaign properties.** Calls to Agent Ratio for the Power Dialing Mode sets how many phone numbers are dialed for each agent. A high setting could result in a lot of dropped calls. Try reducing the Calls to Agent Ratio or setting it all the way to 1.

  A setting of 1 dials only one phone number for each agent, eliminating the chance of dropped calls.

- **Are you running multiple outbound campaigns?.** If you run multiple outbound campaigns at the same time, check if the campaigns use the same skill

groups. If two campaigns dial calls for the same agents, the dialer becomes less consistent, especially if the campaigns use different dialing modes or are completely different campaign types.

Try changing the Skill Groups so the campaigns do not send calls to the same agents.

Troubleshooting Inbound Campaigns

Busy signal when calling an inbound campaign.

- Check to see if the campaign is running

  An Inbound Campaign must be running to answer calls. If the campaign is not running, right- click the campaign and select **Start <Campaign Name>**.

- Check the DNIS tab to be sure the correct number is selected

  Go to Campaign Properties and open the DNIS tab. Is the correct number selected? Click **Add** to view available numbers.

Call disconnected when dialing an inbound campaign.

- If you uploaded your own greeting, is it formatted correctly?

  Confirm the prompt is in the correct format. The supported format for new files uploaded to the system is WAVE audio, ITU G.711 mu-law, mono 8000 Hz. In some applications it is also listed as CCITT u-Law, 8.000 kHz, 8 bit, Mono, 7 kb/sec.

- Did you update a prompt or greeting?

  In the IVR script, open the Play module at the point where the call disconnects. In the Prompt tab, remove the prompt and re-add it.

Campaign accepts only one caller at a time. Second caller receives a busy signal.

- Check the maximum number of lines

  If the maximum number of lines has been reached, the succeeding callers receive a busy signal. Try increasing the maximum number of lines in the General tab in Inbound Campaign Properties. The default is 1 which limits the campaign to only one call at a time. Increase this setting as needed up to the total number of lines assigned to your account.

Customers are not being directed to the correct skill group, agent, greeting, and so on.

- Is the IVR script set up correctly?

  Go to Campaign Properties and open the IVR tab. Review the IVR routing. Check the IVR in the IVR Script by right clicking on the IVR Script. Then click <IVR Script> Properties. Verify that the correct skills are associated with the script.

- Are agents logged in and ready?

  Check with your agents to ensure they are logged in and ready.

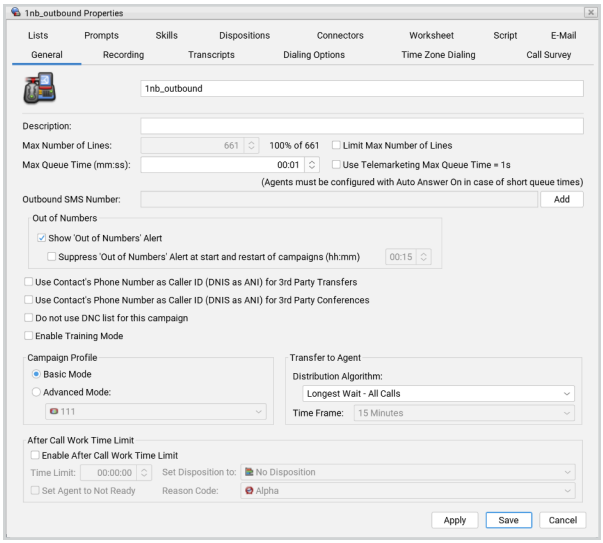
Configuring Campaigns

Administrators create and manage campaigns. Several campaigns may be active at any time.

The following lists how to configure campaigns in Five9:

Outbound Campaign General Properties

Defining the Maximum Number of Outbound Lines
Setting the Maximum Queue Time for Campaign Calls
Using Telemarketing Max Queue Time
Adding an Outbound SMS Number
Setting Notification to Show Out-Of-Numbers Alerts
Using Contact Numbers as Caller ID in Third-Party Transfers
Using a Contact's Number as Caller ID for Third-Party Conferences
Ignoring the DNC List for a Campaign
Using the Campaign in Training Mode
Choosing the Campaign Start Mode
Defining Settings for Calls Transferred to Agents
Defining the After-Call Work Time Limit



Defining the Maximum Number of Outbound Lines

> **Note:** This feature is currently available for early adopters and may not be visible in your domain. Contact your Five9 representative for additional information.

An administrator can use the **Max Number of Lines** field to configure the maximum number of outbound lines for an outbound campaign type and **Limit Max Number of Lines** checkbox to limit a single campaign to the allotted outbound lines. Contact your Five9 representative to request this feature.

Setting the Maximum Queue Time for Campaign Calls

This is the maximum time that the system holds the dialed party by the dialer if no agents are available to process the call. After this time expires, the system takes the action selected in Action on Max Queue Time Expiration under the Dialing Options tab. See also, *Selecting General Settings for Campaign Profiles* in the Basic Configuration Administrator's Guide.

- Default value = one second. Do not increase the default value, except in specific cases, such as when using a dialer to connect calls to remote employees.
- Maximum value allowed by the FCC for dialed calls = two seconds.

- The system counts the FCC two seconds from the end of the called party's greeting; after two seconds the system considers the call dropped.
- Call Analysis uses the remaining second, if enabled, and for routing the call across the network.

Important

The Action chosen for the **Max Queue Time Expiration** setting impacts the abandon rate calculation.

Five9 offers three actions for **Max Queue Time Expiration** setting. You can configure one action for a given campaign. Available actions for Max Queue Time expiration setting include:

- Abandon call
- Play prompt
- Play IVR script (advanced)

Note: The abandon rate 2-second rule calculation option allows you to use a queue time of 2 seconds or higher to identify outbound calls as abandoned. The **Outbound Campaign Abandon Rate % 2 Seconds Rule** standard report shows these values.

This demonstrates how the action configured impacts the abandon rate calculation.

1. When the **Max Queue Time** expires, and if your campaign administrator has configured abandon call or play prompt action, then the system assigns the *Abandon* disposition and includes the call in the abandon rate calculation. The dialer maintains the abandon rate calculation as a 30-day rolling average for the **Monitor Abandoned Call Percentage** feature setting.
2. When the **Max Queue Time** expires, and if you have configured Play IVR script (advanced) action, then the disposition configured at IVR script level determines the disposition. Disposition can be abandon or something else. Abandon disposition calls do get counted in abandon rate calculation.

If the disposition set by IVR script isn't *Abandon* disposition then it will result in under reporting the abandoned calls and hence impact abandon rate calculation.

Customers are responsible for configuring these behaviors in a way that best suits their business requirements. Five9 offers custom reporting services to address various configuration approaches and specific customer requests on how to represent abandon rate in historical reporting.

Using Telemarketing Max Queue Time

To comply applicable telemarketing regulations, set a maximum queue time of one second. This is the recommended maximum queue time for telemarketing activity. Telemarketers typically employ an aggressive dialing strategy, such as predictive or power.

- If set to one second, the system also allocates a second for call analysis and routing; thus, the telemarketer can still have the call answered within two seconds if configured for auto answer.
- If set to two seconds, the telemarketer risks experiencing high abandon rates due to excessively long wait times when connecting callers to live agents.

Note

You must inform the agents to configure their agent desktop for auto answer on outbound campaign calls to comply with shortened queue times.

Adding an Outbound SMS Number

If your administrator enables the domain for SMS interactions you can add an SMS number to your outbound campaigns. You can add any specific number to only one outbound campaign but you can share with an inbound campaign. You can use this configuration to send outbound SMS when an agent receives a call from an outbound campaign that has an existing SMS-enabled number associated with it. When the agent chooses to send an outbound SMS during the call, then the default campaign used is the outbound campaign with an SMS-enabled number. If the outbound campaign doesn't have an SMS-enabled number, then the system uses the last defaulted campaign to send an outbound SMS.

Setting Notification to Show Out-Of-Numbers Alerts

Administrators can disable the notification message. The system displays this message to administrators and supervisors when an outbound campaign runs out of numbers to dial. When using Web2Campaign or the Configuration API to add records to a list, campaigns may often run out of numbers. In this case, alerts are distracting.

Suppressing Notifications

> **Note:** This feature is currently available for early adopters and may not be visible in your domain. Contact your Five9 representative for additional information.

Once enabled at the domain level, you can configure the suppression duration at the campaign level. Select **Suppress 'Out of Numbers' Alert at start and restart of campaigns (hh:mm)** and enter a duration in hh:mm format (for example, 00:15).

The system applies this suppression window when you start or restart outbound and autodial campaigns. During the specified time, the system stops sending alert messages. This prevents administrators from becoming overwhelmed by a large volume of pop-up notifications during campaign starts and restarts, especially when running complex integrations.

After the configured duration expires, the system resumes sending the Out of Numbers alert if the campaign still lacks numbers to dial.

Using Contact Numbers as Caller ID in Third-Party Transfers

When an agent transfers a call to a third party, by default, the system sends the domain ANI as the caller ID number. This option enables customers to override the default domain ANI and send the contact's phone number as the caller ID number. The system uses the contact’s number in these conditions:

- Agents can select **Include Caller Info** from the transfer window.
- The **Use Contact's Phone Number as Caller ID** selection is enabled in campaign properties.
- For transfers from inbound calls.

Using a Contact's Number as Caller ID for Third-Party Conferences

When an agent initiates a conference with a third-party, the system sends the domain ANI as the caller ID number by default. This option enables customers to override the default domain ANI and send the contact's phone number as the caller ID number.

Ignoring the DNC List for a Campaign

The system uses the DNC list in every campaign by default. This option enables you to override this feature and ignore the DNC list for this campaign. If you select this feature, ensure that you remain in compliance with any local, state, or federal regulations. This option isn't enabled on domains by default; if you are uncertain about your domain settings, please contact your Five9 representative.

Using the Campaign in Training Mode

The system runs outbound campaigns in training mode, which delivers calls to agents without dialing real phone numbers. The system presents calls to agents without dialing the phone numbers, to familiarize new agents with the Five9 Agent application or the procedures to follow for a new campaign. The system simulates real campaign behavior by following dialing restrictions and campaign profile filters. Some features don't work in training mode, such as field mapping, final dispositions across campaigns, and statistics.

Training mode dialing rules:

- List penetration or vertical dialing list dialing mode can be used (see **Configuring Dialing Modes, Options, and Call Processing in Outbound Campaigns**).
- All three numbers associated with the contact record are enabled for dialing.
- Calls to Agent ratio is 1-to-1.

- Dispositions don't affect real records. REDIAL, FINAL, or DNC don't affect real campaign records.
- Campaign simulates real campaign behavior by following dialing restrictions and campaign profile filters.

Choosing the Campaign Start Mode

Select the mode to start the campaign:

- **Basic**: Run the campaign without a campaign profile, using default settings.
- **Advanced**: Run the campaign with a campaign profile. You should create a campaign profile before using this mode. See also, Selecting General Settings for Campaign Profiles in the Basic Configuration Administrator's Guide.

Defining Settings for Calls Transferred to Agents

The ACD (Automatic Call Distribution) algorithm defines how the system selects the next agent who will receive a call. The same option is available in the Skill Transfer Module.

- **Longest Wait - All Calls**: Selects the agent who has the longest wait (queue) time for all the calls.
- **Longest Wait - Non-Manual**: Selects the agent who has the longest wait (queue) time, excluding interruptions for manual calls.

  For example, an agent becomes Ready at 10:30, and then makes a manual call at 10:33. At 10:45 the agent is in Ready for 15 minutes.
- **Round Robin**: Selects the first agent from the list of agents for the queue. The list is initially sorted based on longest wait (queue) time for all calls. The system delivers the call to the agent on top of the list. When the agent receives a call, the system crosses off the agent from the list, and the ACD doesn't select this agent until all other agents on the list have also received calls for the current round of dialing. When new agents make themselves ready for the queue, the system adds them to the bottom of the list. An agent who wasn't available or didn't accept an interaction isn't offered another interaction until the next round.
- **Min Calls Handled**: Selects the agent who has received the fewest calls relative to others based on statistics. The system takes the number of calls for the selected time period (see the following option). For example, if you select 8 hours for the Time Frame, then the system gives agents who started their shift the higher priority to receive calls.

- **Min Handle Time**: Selects the agent who has had the least total handle time for calls than others, based on statistics. The system calculates the handle time for the selected time interval (see the following option).

The system defines the **Time Frame** option for **Min Calls Handled** or **Min Handle Time** distribution algorithms. You can select from *15 minutes* to *This day*.

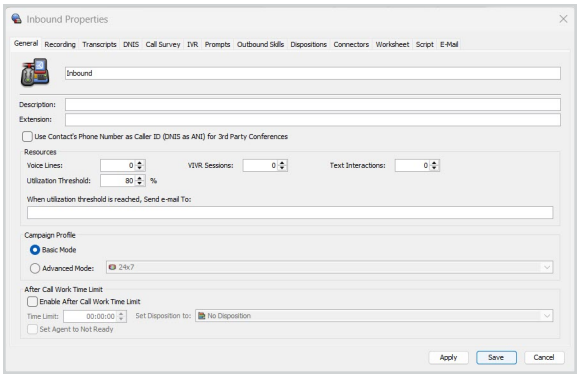
Defining the After-Call Work Time Limit

- **Enable After-Call work Time Limit**: Enable this option if you would like to limit agents' wrap-up time (the time between a disconnecting call and the agent selecting a disposition) when working on this campaign.
- **Time Limit**: Select the time limit for agents in wrap-up mode.
- **Set Disposition to**: Select the disposition that's automatically set for the call, if you reach the After-Call Work Time Limit.
- **Set Agent to Not Ready**: Enable this option if you would like to put agents who reach the After-Call Work Time Limit for a call to be automatically placed in a Not Ready State, so that they can't immediately receive more calls.
- **Reason Code**: If applicable, select the Not Ready Reason Code for agents who get automatically placed in a Not Ready state because of reaching the After-Call Work Time Limit. For example, you may want to create and assign a Reached ACWTL reason code so that Supervisors are aware of why these agents show Not Ready.

Inbound Campaigns General Properties

Setting an Internal Extension for the Campaign
Use Contact Phone Number for Third-Party Conferences
Defining Inbound Line Resources
Choosing the Campaign Start Mode
Setting After-Call Work Time Limits and Actions

When an inbound call is assigned to an agent, the system tries to find all records containing the caller's number. The first one found is associated with the call by default. When a caller uses a phone number that is not in the contact database, no automatic associations are provided.



To associate a call with another contact record or create a contact record for the current caller, agents can click **Select Contact Record** or go to the Contacts tab.

Setting an Internal Extension for the Campaign

Optionally define a four-digit number to be used as internal extension for the campaign.

Use Contact Phone Number for Third-Party Conferences

To use the contact phone number as caller ID for third-party conferences, select this option.

Defining Inbound Line Resources

Setting the Number of Voice Lines

Use this option to specify the number of inbound phone lines or ports (maximum number of simultaneous calls that can be made to the campaign) allocated to the campaign. See Defining the Maximum Number of Lines.

Setting the Number of VIVR Sessions

This setting runs an IVR script using a web browser URL, but instead of TTS prompts playing audio (as in a voice call), it displays the actual TTS text. A voice caller and a VIVR

caller get the same IVR flow and experience; one uses voice, and the other uses a browser screen. For more information about VIVR, see the Interactive Voice Response (IVR) Administrator's Guide.

Setting the Number of Text Interactions

This setting runs IVR scripts for chat or email campaigns, limiting how many IVR sessions can run the IVR script concurrently. For example, if 10 customers are in a chat campaign and the number of text channels is set to five, then five of those customer interactions use the script, and the other five route to the chat campaign's default skill without any scripting logic.

Setting the Line Utilization Threshold

Use this setting to set an upper limit for the percentage of lines used by this campaign. The default value is set in global configuration window. See *Domain Settings* in the Basic Configuration Administrator's Guide.

To send an email notification when your line utilization threshold has been reached, enter a semicolon-delimited list of the email addresses.

Choosing the Campaign Start Mode

The campaign may be started in one of two modes:

- **Basic Mode**: Uses the default campaign settings.
- **Advanced Mode**: Additional campaign settings are defined using a campaign profile. Campaign profile is defined in the selector.

Setting After-Call Work Time Limits and Actions

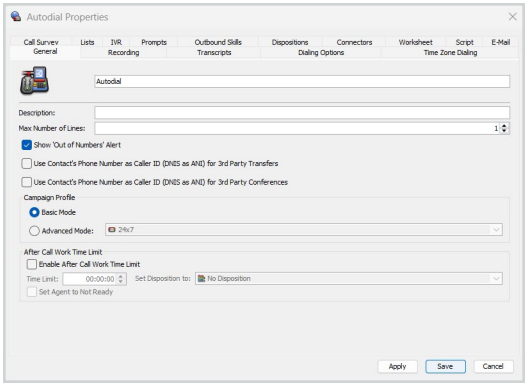
You can define time limits and follow-on actions for after-call work, such as these:

- **Maximum Time Limit**: Specify the maximum time that agents may spend finishing a call.
- **Disposition**: Select the disposition that is automatically assigned to calls if the After-call Work Time Limit is reached.
- **Agent State**: To place agents in a not ready state following expiration of the after-call work time limit, select this option. The agents cannot place or receive any additional interactions until they are ready.
- **Reason Code**: Use this option to select the reason code to assign to agents who are placed in the Not Ready state if they have reached the After-call Work Time

Limit.You may want to create a Reached ACWTL (After-Call Work Time Limit) reason code so that supervisors understand why these agents are not ready.

Autodial Campaigns General Properties

Defining the Maximum Number of Outbound Phone Lines
Creating a Notification to Show Out-of-Numbers Alerts
Using a Contact's Phone Number as Caller ID for Third-Party Transfers
Defining the Campaign Start Mode
Defining the After-Call Work Time Limit



Provide a meaningful name and description to identify the campaign.

Defining the Maximum Number of Outbound Phone Lines

The number of lines controls the number of outbound lines dedicated to the Autodial Campaign. This setting determines how many phone numbers are dialed at one time when the campaign is started.

Creating a Notification to Show Out-of-Numbers Alerts

Allows an administrator to turn off the notification messages stating that the campaign is no longer dialing because the lists have no numbers available for dialing. This message appears to administrators and supervisors when an Outbound Campaign runs out of numbers to dial. When using Web2Campaign or APIs to add records into a list, it is possible for a campaign to frequently run out of numbers. These alerts can distracting.

Using a Contact's Phone Number as Caller ID for Third-Party Transfers

When an agent transfers a call to a third party, the domain ANI is sent as the caller ID number by default. This option enables you to override the default behavior and to send the contact's phone number as the caller ID.

Defining the Campaign Start Mode

Select which start mode is used when the campaign starts. The following two modes are available:

- **Basic**: Use this mode to run the campaign with default settings.
- **Advanced**: Use this mode to run the campaign using a campaign profile. If this option is chosen, you must select a campaign profile. Before using this mode, first create a campaign profile.

Defining the After-Call Work Time Limit

- **Enable After-call work Time Limit**: Enable this option if you would like to limit agents' wrap-up time (the time between a call being disconnected and the agent selecting a disposition) when working on this campaign.
- **Time Limit**: Select the time limit for agents in wrap-up mode.
- **Set Disposition to**: Select the disposition that is automatically set for the call if the After-call Work Time Limit is reached.

- **Set Agent to Not Ready**: Enable this option if you would like to put agents who reach the After-call Work Time Limit for a call to be automatically placed in a Not Ready State, so that they cannot immediately receive more calls.
- **Reason Code**: If applicable, select the Not Ready Reason Code for agents who get automatically placed in a Not Ready state, as a result of reaching the After-call Work Time Limit. For example, you may want to create and assign a Reached ACWTL reason code, so that Supervisors are aware of why these agents are Not Ready.

Understanding the Dialer in Outbound Campaigns

List Order for Outbound Campaigns
Records Order
Numbers Order
Dialing Rules

List Order for Outbound Campaigns

List priorities may be set in the Campaign Properties window. This feature gives you the power to change the order in which calling lists are dialed. Setting equal priorities enables multiple lists to be considered as one sortable, virtual list, without the need to combine the lists. Setting different priorities for multiple lists in one campaign makes the dialer first go through the list with the higher priority, followed by lists with lower priorities.

Setting a list priority of zero (0) disables the campaign's ability to dial that list. You may use a priority of 0 if you would like to leave an old list associated with a campaign for reporting purposes, but not dial it. You may also use workflow rules to set a list priority of 0 to temporarily disable dialing of a list, based on certain condition, such as time of day.

If using multiple lists with different priorities, the dialer completes all lists before returning to the top of the first list for a second pass.

If you partially dial one list, stop the campaign, and add a second list with higher priority, the dialer starts at the top of the new list. After completing the new list, it continues with the original list from the position where it left off.

Dialing ratios force the dialer to call records from multiple lists at specified frequencies (number of times). The dialing ratio is an optional function and can be defined in the Campaign Properties. For example, if your campaign has separate lists with hot and cold leads, you may dial hot leads more often than cold ones, without excluding any leads.

While the dialer attempts to dial lists at their configured ratios, the actual number of connected calls may not completely match this ratio, due to factors like call results and list lengths that do not match the configured ratio.

Records Order

If a sort order is not configured in a campaign profile that is associated to the campaign, the dialer dials the list records in the order they are presented in the list. This allows you to control the order in which the list records are dialed in an external application. You can organize the records in your lists in the necessary order, prior to uploading the list. The system follows this order while dialing.

You can use campaign profile settings to set the dialing order of a calling list, based on any of the contact record fields, along with several other functions and variables. See *Dial Order, Filtering And Sorting Lists* (Campaign Profiles) in the Basic Configuration Administrator's Guide.

The Dialer always remembers the list position even after stopping the campaign. If a campaign is restarted, the dialer returns to that position. It completes the entire list or lists before returning to the top to dial numbers marked for redial.

The list position applies to each campaign. If you move a list to a different campaign, that campaign starts dialing from the top even if another campaign has partially dialed the list. You can use work flow rules to start dialing from the top of the list. See *About Workflow Rules* in the Basic Configuration Administrator's Guide.

You can also manually reset list position. In this case, the dialing will be restarted from either the first records that were added to the list or from the beginning of a specified sort order. See also **Resetting List Position in Outbound and Autodial Campaigns**.

Numbers Order

Each contact record can support up to three numbers. You can select one of two possible ways to dial the numbers. With vertical dialing, the dialer attempts to call

number 1 in the list, then number 2, and then number 3, before attempting to dial the next record in the list. With list penetration, the dialer attempts to call one number per contact record during each list cycle, and only attempts dialing the next numbers for contact records on subsequent list cycles. See **Understanding the Dialer in Outbound Campaigns**.

Dialing Rules

The dialer uses rules during the automatic dial process and while selecting numbers for dialing.

Skipped Numbers or Records
General Dialing Rules

Skipped Numbers or Records

Numbers or records can be skipped by the dialer for many reasons:

- Dialing rules exclusions:
  - Number does not fit the dial time window set in the campaign profile.
  - Another number for the same contact record has already been dialed.
  - The same number has been dialed for another contact record.
  - State dialing rules exclusions prevent the dial attempt.
- Redial exclusions:
  - Maximum number of redial attempts has been reached.
  - Redial time-out has not yet expired.
  - The number has been assigned a final disposition for this campaign.
- Campaign profile exclusions:
  - The number is not enabled in the campaign profile.
  - Campaign profile filters specifically exclude this number.
  - Campaign list order or dialing mode prevent dial attempts.
- Do not call exclusions:
  - The number is on the Do Not Call list.
  - The number has been assigned a Do Not Call disposition.

General Dialing Rules

- Each contact record can contain up to three phone numbers.
- The dialer attempts to reach a contact record using any of the provided numbers.
- The same phone number can be in several contact records, depending on the list update process used when importing records.
- The campaign stores the state of dialed numbers for each contact record. If several campaigns use the same contact record, each campaign stores its dial history for attempted numbers from the contact record.
- Each number is assigned a disposition separately. Therefore, a contact record can have up to three dispositions per campaign. However, depending on disposition type and specific settings, a disposition may affect the entire contact record.
- Each number in the contact record has its own disposition, time stamp when the disposition was set for the number, and a counter recording the number of dialing attempts.

Campaign Profile Settings. If a campaign has been started in basic mode, the default campaign profile settings are used. Basic mode enables all three phone numbers for dialing (if using multiple phone numbers per record) and sets the dialing hours to 8:00 AM to 9:00 PM.

You can use the advanced mode to run campaigns using custom campaign profiles. Using campaign profiles, administrators can disable phone numbers if using multiple phone numbers per record, set different dialing hours per number, configure list dialing orders, add contact record filters, and configure a number of other options.

Disposition Type. The dialer skips list records if they have been assigned a disposition by Redial or Do Not Dial (DND) for campaign dispositions with enabled timers, and the timers have not yet expired.

> **Important**
>
> Contact numbers updated after a DND disposition has been applied have no disposition associated and are exempted from the DND timer restrictions.

In List Penetration dialing mode, redial-type dispositions without timers and Do Not Dial Number for Campaign dispositions with expired reactivation timers are dialed, based on their position in consecutive list cycles. In Vertical list dialing mode, the dialer

attempts to dial numbers or contacts with expired timers as soon as possible if they are higher in the configured sort order or list position.

The dialer does not retry a number that has already been assigned a disposition and if its disposition does not have Redial or Do-Not-Call (which has timeout and can be dialed) type.

The Dialer does not dial contact records with the following dispositions:

- Final Disposition For Contact Record
- Add Number to DNC List with a selected option:
  - Add Active Number and Finalize Record for the Campaign
  - Add All Numbers and Finalize Record for the Campaign

The dialer also does not dial contact records that have any combination of Do Not Dial Number for Campaign (without a reactivation timer) or Add Number(s) to DNC List dispositions applying to all of the numbers for that contact records. See also, **Configuring Dispositions**.

Manual Intervention. The dialer does not choose a record if there is a call taking place using a record's associated number, in cases when one number is associated to multiple records.

Only the Final Disposition of a manual call affects Dialer behavior with regard to the record. Manual calls do not affect campaign runtime statistics (except Final dispositions).

Available Agents. An outbound campaign in power or progressive mode *reserves* an agent before making a call. The campaign makes calls to customers for the reserved agents. If a call made for an agent fails, the campaign removes the hold on the agent. The agent can be reserved again by the same campaign or another campaign.

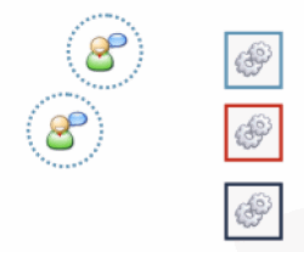
The estimated number of calls at a given time for such campaigns can be calculated by the following formula: Calls to Agents Ratio * Number of Reserved Agents.

Example

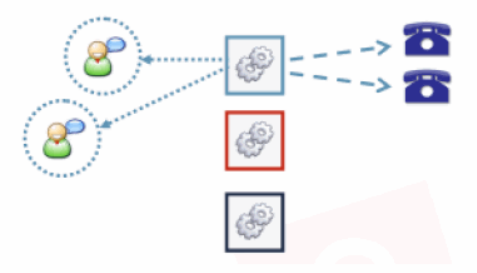
Assumptions:

- Campaigns have the same skills.
- Any campaign call can be assigned to any agent.
- Calls to Agents Ratio = 1.

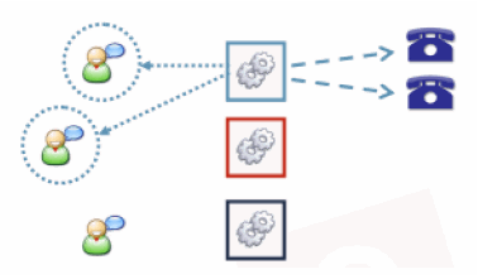
1 Blue campaign is first - it is reserving two agents.



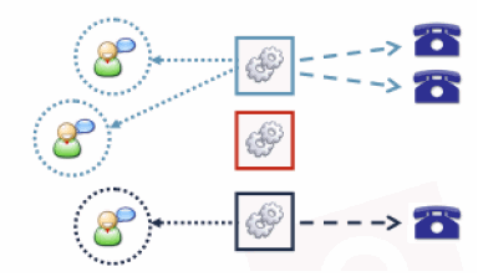
2 It makes calls to customers for the reserved agents.



3 New agent is appearing (go off break).



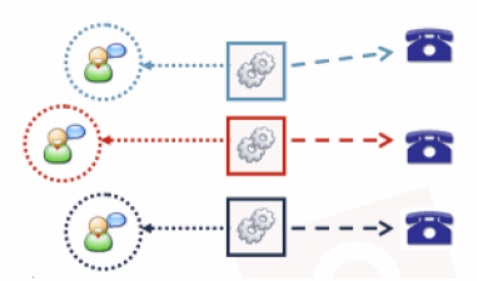
4 Third campaign is reserving it, calling the customer for the reserved agent.



5 One of two calls of blue campaign is broken and it is un-reserving one agent.



6 Red campaign is reserving the agent and making call for the agent.



Call Priority. Call priority is measured on a scale of one to 100, with one being the lowest priority. Call priority determines which calls in queue are answered first. Higher priority calls are typically answered before lower priority calls, regardless of when they enter the queue. Additionally, call priority may also be adjusted in the IVR Skill Transfer module during queue time and affected by your task distribution settings.

Basic inbound and autodial campaigns not using a campaign profile begin with a call priority of 10. Basic campaign outbound calls begin with a priority of 50 for preview dialing mode and 60 for all other dialing methods. Campaign profiles begin with an initial priority of 60 for all call types.

See *Creating Campaign Profiles* and *Setting the Distribution of Interactions* in the Basic Configuration Administrator's Guide . See also, *Skill Transfer Module* in the Interactive Voice Response (IVR) Administrator's Guide.

State Dialing Rules. State Dialing Rules define the dates, days, and times when contact records in a particular State will not be dialed. This feature can be enabled for a campaign in the General tab of the Campaign Properties. See **Dialing Rules**.

Statistics. Predictive Dialer Campaigns automatically control the pace of outbound calls, based on several statistics, such as average wrap time (AFTER-CALL WORK TIME), average handle time, and abandonment (dropped call percentage). See **Predictive Dialing Mode**.

For Power Dialing Mode campaigns with the Monitor Abandoned Call Percentage option enabled, the dialer automatically drops the Calls to Agent ratio to 1-to-1 if the configured Max Abandon Call Percentage is reached. Predictive Dialing Mode campaigns gradually drop the dialing rate if the campaign exceeds its Max Abandon Call Percentage. This change is more subtle than in Power Dialing campaigns.

Changes to Running Campaigns. You may apply some changes to your running campaigns. Read below how changing options influences the dialer.

Any changes to list orders or dialing modes do not affect the behavior of records that have Redial-type dispositions with timers. These records are dialed as close as possible to the scheduled redial times.

Records Order Changed. The administrator can change the Dialing Schedule for a number in Campaign Profile Properties, which may affect the order of dialing records.

The administrator can change the sort order in the campaign profile. In this case, the dialer applies new criteria to the list immediately and start using the new criteria for dialing, from the top of the newly configured list order. See *Dial Order*, *Understanding The Dialer*.

New Records Appear. If a record is added to the list while a campaign is in the middle of the list, it considers the record for dialing, according to sort order defined in the Campaign Profile. If the new list record is higher in the sort order than the dialer's current list position, it is considered for dialing right away. See *Adding Contact Record, Editing/Updating Contacts and Importing/Updating Call Lists*.

APIs and Web2Campaign list records that arrive with `F9CallASAP` flags set to true are put into their own special queue, which has higher priority than other list records. The sort order for this ASAP queue is determined independently from the rest of the list in

Campaign Profile Properties under *Dial ASAP List Record Queue for Web APIs*. The available sort orders are:

- FIFO (first in, first out)
- LIFO (last in, first out)
- Contact Record Field(s): Sorts the ASAP queue according to the Order by criteria configured in the Filter tab of Campaign Profile Properties.

In addition to the sort order, you can specify the timeout period for ASAP queue records. If the lead has not been dialed and assigned a disposition during the timeout period, it is moved to the normal list queue and is no longer considered as an ASAP record.

You can also set the number of dial attempts for ASAP record in the Campaign Profile Properties window. This parameter indicates the number of dial attempts for an ASAP record, after which it loses the ASAP flag and gains regular priority. If you are using dial ASAP, the number must be set to 1 at minimum. See also *Web2Campaign*.

Campaign restarted. If the campaign was restarted without changing the sort order defined in the profile, it continues dialing from the last record before stopping.

Sort Order Changed. If the sort order is changed in the campaign profile properties, the campaign starts calling from the beginning of the list.

List Dialing Mode Changed. If the list dialing mode is changed, contact records are treated based on the new list dialing mode setting. For more information, see **Configuring the List Dialing Mode for Outbound and Autodial Campaigns**.

List Position Reset Manually. Dialing starts over from either the first records that were added to the list or from the beginning of a specified sort order. The list position can be reset manually or as a result of a workflow rule. For more information, see **Resetting List Position in Outbound and Autodial Campaigns**.

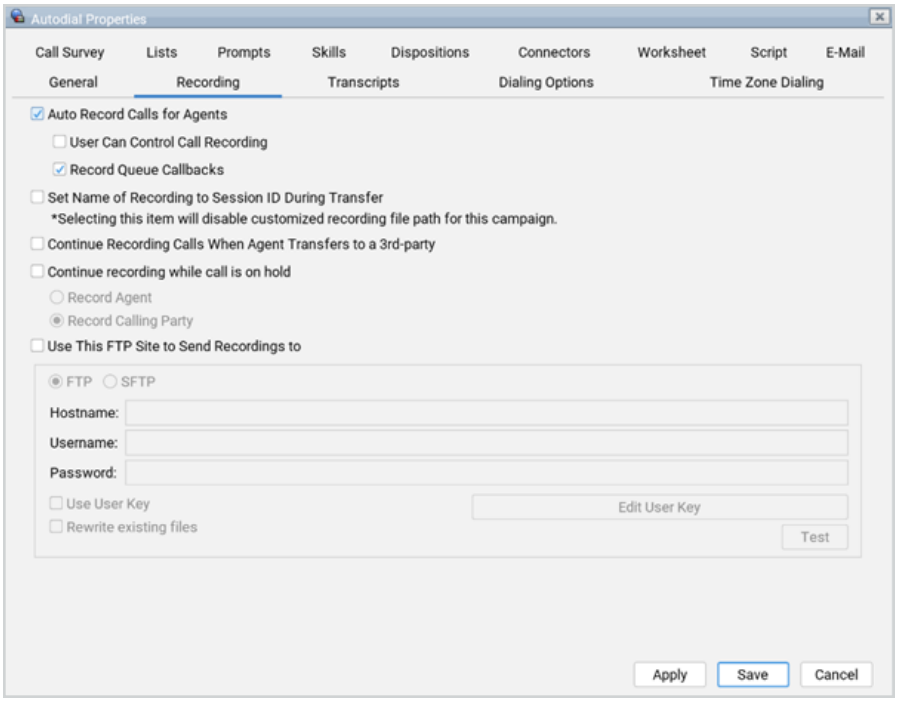
Configuring Call Recordings

This section applies to all types of campaigns. Call recordings are saved in the user properties of the agents as separate files that have the same session ID as the original call. Recordings are listed in call logs, worksheets, and call segment reports.

[Agent Settings](#)
[Campaign Settings](#)
[IVR Settings](#)

By default, call recordings are limited to one hour. If your campaigns make or receive calls that may exceed this duration, contact your Five9 support representative to increase the maximum call recording length to up to three hours.

The recording is a WAV file that contains the agents' conversations during the call sessions. The number of calls recorded is determined by the number of recording ports provisioned for your account. By default, an account with five seats has one recording port. An account with ten seats has two recording ports. Therefore, if ten agents are taking calls at the same time, 20% of the calls are recorded.



This table describes each option:

Setting	Description
Auto Record Calls for Agents	Automatically record all campaign calls, from beginning to end. To enable the agent to control when calls are recorded, check **User Can Control Call Recording**. To enable queue callback recording, check

Setting	Description
	Record Queue Callbacks.
Set Name of Recording to Session ID During Transfer	By default, the file name for a recording transferred to your FTP server is the agent's name with a time stamp. However, you can name your recordings with the unique session ID. This option enables you to track recordings. Applies only to FTP transfer.
Continue Recording Calls When Agent Transfers to a 3rd-party	If enabled, you can continue recording calls after third-party call transfers are initiated in an IVR. If this feature is greyed-out (disabled) contact your Five9 representative.
Continue recording while call is on hold	Record either the contact or agent on hold or the parked contact. This call segment, except for the on-hold music, is saved in a separate file. The entire call recording is associated with the agent. You are responsible for ensuring that parties are informed that they are being recorded.
Use This FTP Site to Send Recordings to	Transfer the recordings to your server. Select an FTP option, and enter the host name, user name, and password of your server. Passwords are masked. Avoid using FTP credentials that contain the @ symbol or other special characters. To test your FTP settings, click **Test**. Recordings are stored on the Five9 system for 30 days. You can access them in the agent's account properties. The files are exported via FTP daily. The original file is deleted from the VCC after the transfer is complete. See *Configuring Default FTP Settings*. These values may be different from the defaults set in the **Actions** > **Configure** menu. Recordings for this campaign are sent to a different FTP address. If you configure FTP settings for each campaign, those settings override the settings in the VCC Configuration window.

Agent Settings

If the permission is enabled, agents can record the calls by pressing the appropriate button.

The Voicemail/Recordings tab of the user properties window includes the Call Recording section. If **Always Record Agent's Calls** is checked, all the agents' calls are recorded, whether or not call are associated with a campaign.

To record more than the default 20% of allocated agent seats, your account must have enough provisioned recording ports.

Campaign Settings

You can enable these options for a campaign in the Recording tab:

- Auto-Record Calls for Agents
- Control Call recording by User
- Setting Recording name to Session ID
- Record Calls when Agent transfers to a third party
- Campaign-specific FTP server

IVR Settings

The following IVR modules can collect audio information:

- Input Module (Record User's Input as Audio File option)
- Menu Module (Record User's Input as Audio File option)
- Conference Module (Make Recording of the Conference option)
- Voice Input Module
- 3rd Party Transfer Module (Record 3rd party Call option).

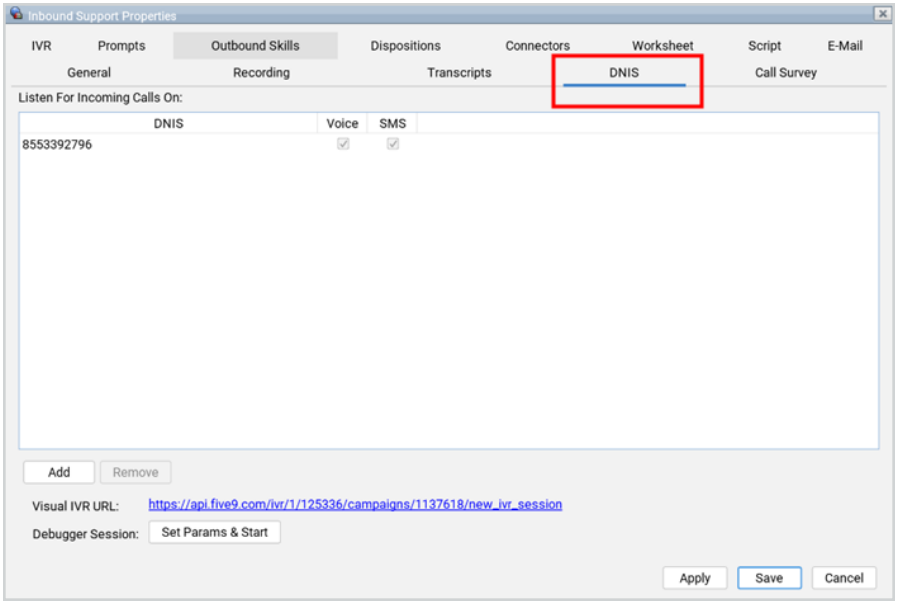
See also, Using Recorded Files in the Interactive Voice Response (IVR) Administrator's Guide.

Configuring DNIS for Inbound Campaigns

Use the Dialed Number Identification Service (DNIS) tab to associate a phone number or multiple phone numbers with this campaign. When a contact calls or sends an SMS

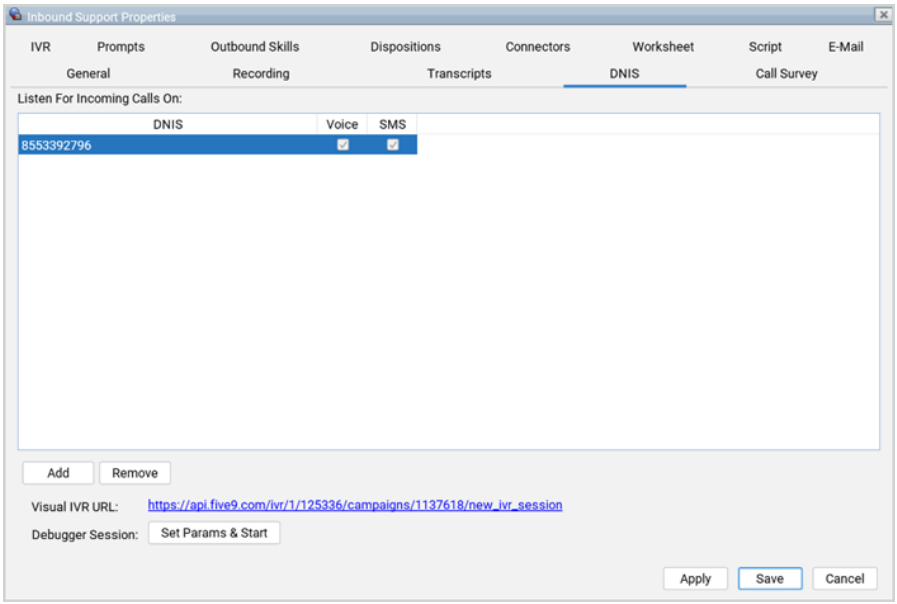
message to this number, the interaction is processed by the campaign and routed based on the IVR setup. You must have available DNIS numbers assigned to your account to be able to add them to your campaigns.

[Associating DNIS to an Inbound Campaign](#)
[Forwarding Calls to a Five9 Inbound Campaign](#)
[Removing DNIS from an Inbound Campaign](#)



Associating DNIS to an Inbound Campaign

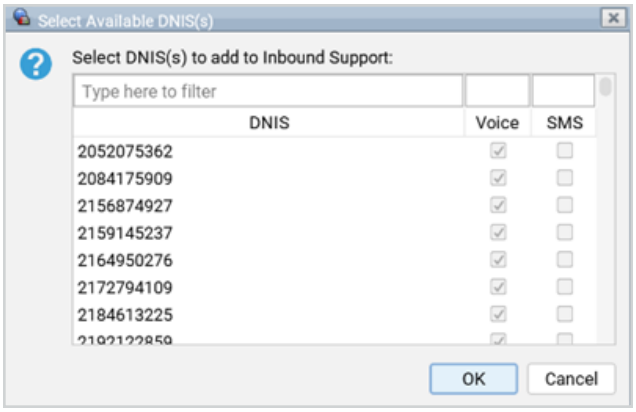
When a contact calls or sends an SMS message to this number, the interaction is processed by the campaign and routed by the IVR or Visual IVR script to the appropriate agents or skill group. Each campaign can have multiple inbound numbers. A specific may be assigned to only one campaign. You do not have to stop a campaign before adding a DNIS number.



1 In the Campaign Properties, select the DNIS tab.

2 Click **Add** to display the list of all available numbers assigned to your account.

Numbers already assigned to other inbound campaigns do not appear in the list. If your domain is enabled for SMS, this list identifies numbers enabled for voice, SMS, or both.



You can filter your results using exact match or contains using an alphanumeric string or boolean match specific to the field.

3 Select one or more numbers for this campaign.

4 Click **OK**.

5 Click **Save** or **Apply**.

For information about the Visual IVR URL at the bottom of the tab, see Using the Visual IVR URL in the Interactive Voice Response (IVR) Administrator's Guide.

Forwarding Calls to a Five9 Inbound Campaign

If you own toll-free numbers, you can instruct your carrier to forward calls to a DID number provided by Five9, which would enable calls to your toll-free numbers to be answered by the Five9 campaign. Simply add the selected DID number to the campaign.

You can also move the toll-free number to Five9 (RESPORG: Responsible Organization). Contact your account manager for more details.

Removing DNIS from an Inbound Campaign

You do not have to stop a campaign before removing a DNIS number.

1. Select the numbers to remove.
2. Click **Remove**.
3. Click **Yes**.
4. Click **Save** or **Apply**.

Configuring Dialing Modes, Options, and Call Processing in Outbound Campaigns

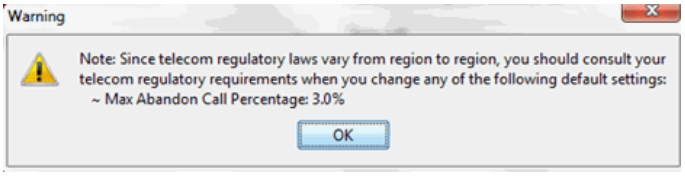
The campaign dialing mode defines how the outbound campaign dials the records. Configuration options differ for each type of campaign dialing mode. Dialing options define how the campaign processes records in the list.

Default Campaign Settings
Predictive Dialing Mode
Power Dialing Mode
Progressive Dialing Mode
Preview Dialing Mode
TCPA Manual Touch Dialing Mode

Default Campaign Settings

For all campaign dialing modes, campaign dialing options are set initially to default values recommended by Five9 to help you to remain in compliance with Federal Communications Commission (FCC), Federal Trade Commission (FTC), and UK Ofcom telemarketing regulations.

If you change the default settings, you see a warning which indicates that you might become out of compliance. For example, a U.S.-based domain administrator would receive this warning if trying to change the Max Abandon Call Percentage value from the preset default:



Default values are set for these campaign fields:

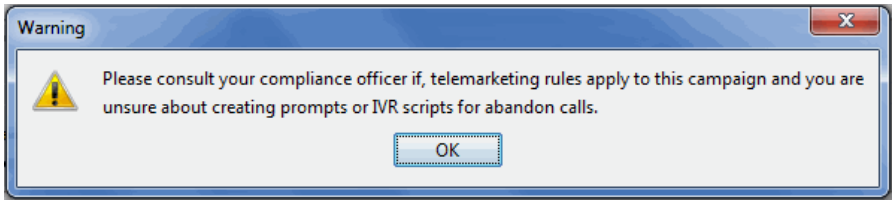
- Max Queue Time
- Show ‘Out of Numbers’ Alert
- Monitor Abandoned Call Percentage
- Max Abandoned Call Percentage
- Call Analysis
- Voice Detection level
- Action on Max Queue Time Expiration

The calculations for some values differ between U.S.- and European-based domains. Outbound campaigns use the rolling 30 days to monitor the abandon rate for US domains, while for UK domains it uses 24 hours. Customers can request a Five9 business representative to set up their domain as either a US or UK domain.

Refer to the appropriate agency regulations for current requirements.

The message below is displayed when any of the following conditions occur:

- The campaign is saved for the first time.
- A new prompt is configured for queue time expiration action.
- Abandon call or play IVR script is selected for queue time expiration action.



Predictive Dialing Mode

The predictive dialer automates outbound activities and maximizes agent productivity by ignoring unreachable numbers, such as those with busy signals, operator intercepts, no-answers, and do-not-call numbers, and by automatically adjusting the dialing pace. The dialing pace is determined by the predicted agent availability based on historical and short-term statistics, such as call handle and ring times, percentage of answered calls, and dropped call percentage for the last 30 days. The dialer attempts to keep the campaign below the configured dropped call percentage. All rules are described in Dialing Rules.

The Predictive Dialing Mode option is designed for contact centers and businesses that regularly perform large numbers of outbound calls. Predictive Dialing mode is an aggressive outbound algorithm that is best suited for high volume outbound environments with a large pool of agents dedicated to outbound activity. Predictive Dialing mode should never be used with less than 15 agents consistently active in the campaign at all times. Agents skilled for a campaign that uses Predictive Dialing should be committed to that campaign, and not be skilled for other campaigns, particularly inbound campaigns. Sharing agents with other campaigns or having inconsistent staffing levels may result in a high number of abandoned outbound calls. Five9 recommends that you consult your Five9 representative before implementation to determine if Predictive Dialing mode is right for your contact center.

Tuning the Predictive Dialer
Managing Agent Staffing and Campaign Priority Behavior
Controlling the Dialing Pace
Setting Action on Max Queue Time Expiration

Tuning the Predictive Dialer

To set the predictive dialing options, use the **Abandoned Call Percentage** and **Call Analysis** options.

Calls are presented to agents when they are available. The calls-to-agent ratio is automatically adjusted, which maximizes agent usage while attempting to stay below the configured dropped-call percentage. The dialer automatically paces the number of calls, without reserving agents or waiting for individual agents to be available. Numbers may be dialed in anticipation of an agent becoming available. When reaching the maximum dropped call percentage, the dialer gradually reduces the calls-to-agent ratio to attain an acceptable value.

Several factors can lead to increased numbers of dropped calls, for example:

- Few calls
- Short campaign run-time
- Few agents
- Agents shared across multiple campaigns
- Agents suddenly not ready

Managing Agent Staffing and Campaign Priority Behavior

Campaign priority determines the order in which the dialer evaluates campaigns during each dialing cycle. The system always evaluates higher-priority campaigns first.

However, campaign priority doesn't prevent lower-priority campaigns from dialing. If a higher-priority campaign has no available agents or no records ready for dialing at the moment of evaluation, the dialer assigns calls from other active campaigns. This behavior ensures that agents remain continuously utilized.

In predictive dialing, this behavior is more sensitive to staffing levels because the dialer places calls in anticipation of agent availability. When the number of active agents is low or inconsistent, timing gaps increase, which may result in lower-priority campaigns dialing before higher-priority campaigns.

For optimal performance, you should maintain at least 15 consistently active agents in predictive campaigns and avoid sharing those agents across multiple campaigns.

Controlling the Dialing Pace

Use Abandoned Call Percentage configuration to adjust the dialing pace.

If too many calls are abandoned, adjust the tolerance. The default values are provided to help you remain in compliance with dialing regulations. If you attempt to change the value, you see a warning and a reminder of the default value.

Setting Action on Max Queue Time Expiration

When the maximum queue time is reached, you must play a recorded prompt for the caller. The script must give the caller your company name and callback number.

Power Dialing Mode

Use Power Dialing mode when you want to set a fixed Calls-to-Agent Ratio for dialing multiple calls per agent. The dialing algorithm identifies agents as they become available for calls and continuously dials at the configured rate, until live persons are connected with the agents. The dialer automatically detects and filters out unreachable numbers, such as those with busy signals, operator intercepts, and no-answer calls, and avoids do-not-call (DNC) numbers to ensure compliance with regulations.

Power Dialing Mode Characteristics
Agent Staffing and Campaign Priority Behavior
Controlling the Dialing Pace
Using Call Analysis to Detect Fax, Answering Machines, and Call Screening

Power Dialing Mode Characteristics

- **Dials at a fixed Call(s)-to-Agent Ratio with between 1 and 10 calls placed per agent**: Dials whenever an agent becomes ready for calls.
- **Agent usage varies, depending on the configured Call(s)-to-Agent ratio.**
- **Dialer reduces the Calls-to-Agent ratio when reaching the maximum abandoned call %**: Abandoned call percentage for last 30 days (if Monitor Dropped Call Percentage is enabled) for U.S.-based domains; Last 24 hours for U.K.-based domains. Calls are immediately reduced to a 1:1 call-to-agent ratio if this percentage threshold is reached.
- **Campaign statistics control the dialing pace**: If the Calls-to-Agent Ratio is set to a rate that exceeds your account's maximum number of outbound lines, and depending on how many agents are currently available for calls, the dialing rate at any given time will not exceed your maximum number of lines.

Agent Staffing and Campaign Priority Behavior

Campaign priority gives higher-priority campaigns preference during each dialing cycle. The system always evaluates higher-priority campaigns before lower-priority campaigns.

If a higher-priority campaign has no available agents or no records ready for dialing at the moment of evaluation, the dialer assigns calls from other running campaigns. This design keeps agents continuously engaged and maximizes productivity.

With a limited number of agents, these timing conditions occur more often. As a result, lower-priority campaigns may occasionally dial before higher-priority campaigns.

To improve consistency in priority-based dialing, Five9 recommends assigning a minimum of 10 active agents to campaigns that run concurrently.

Controlling the Dialing Pace

You may also enable the Monitor Abandon Call Percentage option for this dialing mode. If the campaign's Abandoned Call Percentage for the last 30 days exceeds the configured threshold, the Power Dialer can gradually throttle down to a 1-to-1 Call-to-Agent Ratio, until an acceptable Abandoned Call level is reached.

Keep in mind that the default value is set to help you remain in compliance with dialing regulations. If you change from the default value, you will receive a warning and are minder of the default value.

Using Call Analysis to Detect Fax, Answering Machines, and Call Screening

Call analysis to detect fax, answering machine, and call screening is optional.

Note

Five9 recommends that you disable abandoned call monitoring and the calls-to-agent ratio option when using fax, answering machine, and call screening detection.

Progressive Dialing Mode

Progressive dialing is designed for campaigns that have a relatively high level of agent usage, delivering calls to the agents as they become available. Progressive dialing uses

campaign statistics to adjust the calls-to-agent ratio without exceeding the configured maximum abandoned call percentage defined in the default campaign settings (see **Default Campaign Settings**). Progressive dialing is less aggressive than predictive dialing and is suitable for campaigns with a minimum of 10 active agents to achieve consistent dialing performance.

To configure additional dialing mode characteristics, see **Defining the Extended Dialing Strategy**.

Progressive Dialing Mode Characteristics
Agent Staffing and Campaign Priority Behavior
Controlling the Dialing Pace
Using Call Analysis and Fax, Answering Machine, and Call Screening Detection

Progressive Dialing Mode Characteristics

- **The dialer automatically adjusts the Calls-to-Agents ratio**: Based on the percentage of answered calls and the current dropped call percentage level.
- **The dialer reserves agents as they become available for calls**: Starts dialing numbers from the campaign's list(s), until a live party is reached.
- **Agent usage is medium**.
- **Calls-to-agent ratio is automatically controlled**: Numbers are dialed only when an agent becomes available for calls.
- **Dialer manages Calls-to-Agent ratio**: When reaching the maximum dropped call %, the dialer gradually reduces the Calls-to-Agent ratio.

Agent Staffing and Campaign Priority Behavior

Campaign priority determines the order in which the dialer evaluates campaigns. The system always evaluates higher-priority campaigns first during each dialing cycle.

If no agents are available or no records are ready for immediate dialing in the higher-priority campaign, the system evaluates other active campaigns and assigns calls accordingly. This behavior ensures that agents remain continuously utilized.

When agent availability is low, the system is more likely to temporarily shift to lower-priority campaigns due to the lack of ready work in higher-priority ones. As a result, lower-priority campaigns may occasionally be dialed before higher-priority campaigns.

Five9 recommends assigning a minimum of 10 active agents to progressive campaigns to improve dialing consistency and reduce these occurrences.

Controlling the Dialing Pace

Monitor abandoned call percentage for last 30 days (U.S.) or last 24 hours (EU). If you are experiencing too many abandoned calls, you can adjust the tolerance for abandoned call percentage. Keep in mind that the default value is provided to help you remain in compliance with dialing regulations.

If you change the default value, you will receive a warning and a reminder about the default value.

Using Call Analysis and Fax, Answering Machine, and Call Screening Detection

Fax, Answering Machine, and Call Screening Detections (Call Analysis) are optional.

Note

Five9 recommends that you disable abandoned call monitoring and calls-to-agent ratio options when using call analysis.

Preview Dialing Mode

Use Preview Dialing mode as an alternative to the automatic dialing modes to give more control over dialing to agents. Preview Dialing is often used in sales-oriented call center operations, where agents have more frequent and personal interaction with contacts. Preview Dialing mode does not filter undesired call results, such as busy signals or operator intercepts. Instead of automatically dialing numbers from a list and delivering connected calls to agents, an agent receives the contact record before any number is dialed. The agent can review the contact record details before a call is made. Agents can be allowed to skip records which they preview.

Extended Strategy Support for Preview Dial
Prerequisites for Preview Dialing Mode
Preview Dialing Mode Characteristics
Agent Staffing and Campaign Priority Behavior
Preview Campaign Interrupt Options
Skipping Records or Forcing Numbers to be Dialed
Defining the Maximum Preview Time
Features Not Used with Preview Dialing Mode
Setting Dialing Options for Preview Campaigns
Dispositions in Preview Dialing Mode
Skipping Recodes in Preview Dialing Mode

Extended Strategy Support for Preview Dial

This feature adds support for the Extended Dialing Strategy to outbound campaigns using Preview dialing. Campaign administrators can define extended dialing strategies for Preview campaigns to how often and when to redial important leads. This feature is available for Predictive, Power, and Progressive dialing modes.

Prerequisites for Preview Dialing Mode

The desired campaign profile must already exist to use the Advanced Campaign Start Mode.

Preview Dialing Mode Characteristics

- **Preview Dialing option provides support for Extended Strategy List Dialing Mode**: Requires extended strategy to be configured and selected. To manage an extended strategy, see **Defining the Extended Dialing Strategy**
- **Agents receive the contact record before dialing takes place**: Agents make decisions about whether to call a contact.
    - If a Preview Dial campaign is configured to use extended strategy then agents receiving the contact record before dialing takes place: Agents make decisions about whether to call a contact.
    - Agent will not have a choice to select a number (primary, alternate 1, alternate 2) of the contact record number to dial. System will only show a single number which is based on campaign profile and extended strategy settings.
- **Workflow rules, dialing rules, dialing hours, list sort order, and contact record criteria apply**.

- **Agents can skip contact records**: Assign permission to individual users in the **User** > **Roles** tab or to groups of users in **User Profiles** to allow users to skip records in preview (*User Can Skip Contact Records)*.
- **Individual phone numbers are not dialed ahead of delivery to an agent.**

Agent Staffing and Campaign Priority Behavior

Campaign priority determines the order in which the system evaluates campaigns during each dialing cycle. The system always evaluates higher-priority campaigns first. However, priority doesn't prevent lower-priority campaigns from dialing.

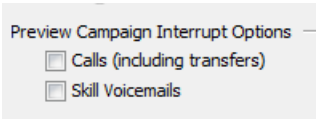
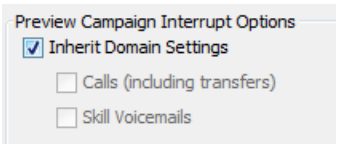
If no agents are available or no records are immediately ready in a higher-priority campaign at the moment of evaluation, the system evaluates other running campaigns and may assign work from a lower-priority campaign. This behavior ensures that agents remain productive across all active campaigns.

When a small number of agents are assigned to multiple campaigns, timing gaps occur more frequently. These gaps increase the likelihood that lower-priority campaigns receive available agents, even though the system evaluates higher-priority campaigns first.

Five9 recommends assigning a minimum of 10 active agents to campaigns to achieve more consistent priority-based behavior.

Preview Campaign Interrupt Options

Preview campaigns can allow contact preview sessions to be interrupted with an incoming call or a skill voicemail that is more important to the business. Agents interrupted with either a call or a voicemail are returned to the preview session after a disposition is set. Preview Campaign Interrupt Options can be set in the **Actions** > **Configure** > **Other** tab or in **Campaigns** > **Configure** > **Dialing Options** tab.

Allow interrupts from calls or Skill Voicemails for the campaign. Set in the **Actions** > **Configure** > **Other** tab.	When set in the **Campaigns > Configure > Dialing Options** tab, you can inherit what was set in the domain settings or override those settings in the campaign by selecting Calls, Skill Voicemails, or both.
	

Skipping Records or Forcing Numbers to be Dialed

Administrators can configure preview dialing to allow agents to skip records or force a number to be dialed after a configured preview time. The ability to skip records is configured as an agent permission in the Agent Role tab. Dialing rules and other campaign settings apply. When the agent skips a record, a disposition must be selected from the campaign's configured **Decline Preview Record Dispositions**, and the system delivers the next record.

Defining the Maximum Preview Time

You can configure Preview Dialing to force the record to be dialed after a defined preview time. Presents contact records to agents who may select which number to dial and must manually set No Party Contact dispositions.

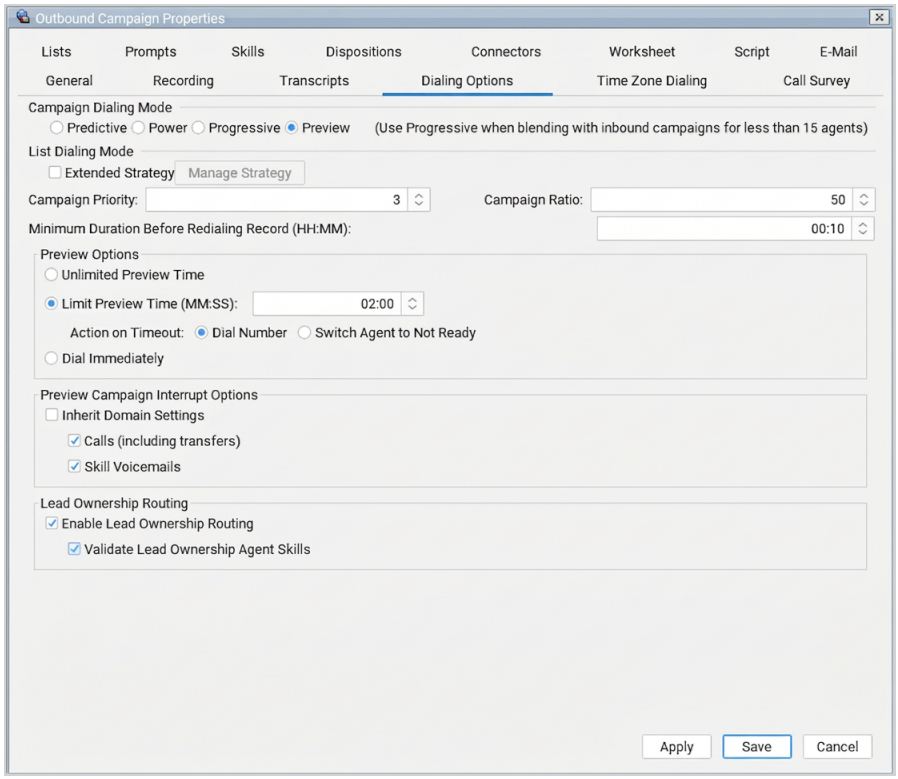
Features Not Used with Preview Dialing Mode

- Calls To Agent Ratio
- Dropped Call Percentage
- Call Analysis

Setting Dialing Options for Preview Campaigns

Minimum Duration Before Redialing Record (HH:MM)	Minimum time between calls to the numbers indicated in a contact record. This setting does not affect Redial dispositions with a Redial Timer until the disposition's number of attempts are reached. See *Number Redial Timeout*.
Preview Options	Select from: • **Unlimited Preview Time**: Agents can take as much time as needed to make calls to the record. • **Limit Preview Time (MM:SS)** : Limits the length of time an agent can preview a record. The timer appears on the bottom pane of the Agent application. The **Action on Timeout** selection determines what happens when the preview time expires. • **Dial Immediately**: Automatically dials the appropriate number for the preview record, without waiting for an agent to make a decision. • **Switch Agent to Not Ready**: Places the agent in the Not Ready state if they do not dial within the configured preview time. The

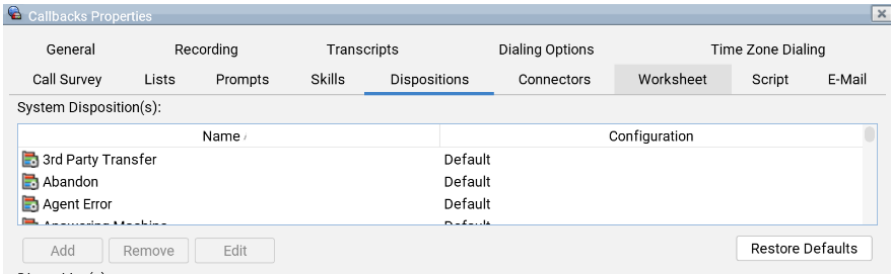
	agent receives a notification after the timeout period.
Preview Campaign Interrupt Options	• Inherit domain settings for interrupt options, or • Allow incoming calls, transfers, and skill voicemail to interrupt contact record preview. Cannot be used in Preview campaigns with Dial Immediately configured. When an agent switches to a Not Ready state after processing a voicemail that interrupted the preview task, no interruptions occur in the current preview task.
Lead Ownership Routing	• **Enable Lead Ownership Routing**: Automatically directs outbound campaign calls to the contact's assigned agent instead of distributing them across the general agent pool. • **Validate Lead Ownership Agent Skills**: Verifies whether the agent is assigned to a skill associated with the outbound campaign before a lead ownership task is assigned to an agent. For more information on lead ownership routing, see Lead Ownership in Advanced Campaign Manager . **Note:** This feature is currently available for early adopters and may not be visible in your domain. Contact your Five9 representative for additional information.



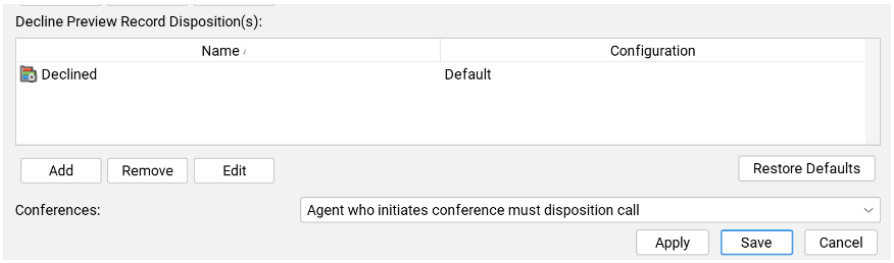
Dispositions in Preview Dialing Mode

Define the dispositions available to agents when the agent wishes to skip (decline) a previewed record. The default disposition for such cases is labeled as system disposition Declined. You can edit the properties of this system disposition or add a different, custom disposition that can be used in such cases. Examples of custom skip dispositions are Skip - Re-Queue (I do not want to dial this record now but I want to keep it in the list and dial later), Skip - Not Qualified (I do not have enough qualification to dial this number).

When working with preview dialing campaigns, agents initiate the call to the contact. Since some calls are not answered (busy, no answer, and so on), we must provide the agent with dispositions for these unanswered calls. Additionally, Operator Intercept and SIP Response Codes are available as call dispositions. Like other outbound campaigns, preview dialing campaigns have access to a set of system dispositions. Changes applies only to this campaign. The Configuration field for such dispositions displays Custom, instead of Default.



As with predictive dial campaigns, you should add custom dispositions for answered calls.



The disposition type and disposition redial timers are used for preview calls and for declined records. For example, if a decline disposition is configured to redial in five minutes, that record is available for preview again after the redial timeout.

> **Note**
>
> When a Preview Dial campaign is configured to use the Extended Strategy List Dialing Mode, you should avoid the use of disposition types with redial timers. Disposition types with redial timer will take precedence over extended strategy redial configuration if both are configured.

Skipping Recodes in Preview Dialing Mode

Depending on your configuration, agents may have the option to skip records when working with preview dialing campaigns. When agents skip records, they select a skipped disposition. Clicking the Dispositions tab makes the Decline Preview Record Disposition(s) section available. This section is only enabled if the Campaign Dialing Mode is set to Preview.

TCPA Manual Touch Dialing Mode

TCPA Manual Touch Dialing mode is available only in domains enabled for TCPA Manual Touch Mode. TCPA domains are generally used for telemarketing campaigns to dial cell phones when the business does not have expressed consent to call customers on their cell phone.

Campaigns are configured in a domain with no other dialing modes available. In the **Dialing Options** tab for the outbound campaign, you define the maximum preview time before the agent status is changed to Not Ready. This option is a strict version of the Preview Dialing mode: contacts are shown to agents but are not dialed automatically.

By default, agents are required to input all internal and external phone numbers manually. External numbers are not dialed automatically. Agents cannot cut and paste or drag and drop a phone number into the field. When ready to dial an external number, agents must enter the number in the field. After agents have entered the number correctly, the **Dial** button is activated.

This feature applies to these types of calls, whether or not they are part of a campaign: click-to-dial, call previews, and queue and voicemail callbacks. For queue callbacks, automatic dialing is disabled, and, for outbound calls, automatic answer is disabled. However, using speed dial for internal numbers and transferring calls to third parties do not require manual retyping.

Restrictions
Characteristics
Skipping Records
Removing Contact Records From a Running Campaign

Restrictions

You cannot set the dialing mode to force a record to be dialed after a specified preview time is reached.

No automatic dialing capabilities are available with this dialing mode (specifically, the Dial Immediately and Dial Number options have been removed).

Characteristics

- **Agents have complete control over dialing and setting call dispositions**: Any dialing actions associated with a call to an external number are performed manually.

- **Presents contact records to agents who may select which number to dial**: Agents must manually set No Party Contact dispositions.
- **Excludes any autodial capability to external numbers**: Dialing rules and other campaign settings apply.
- **Agent receives the contact record before any number is dialed**: Numbers cannot be automatically dialed from a campaign list or have connected calls delivered to agents.
- **Agent can review the contact record details and must enter numbers manually to dial**: Agents must retype any numbers that will be dialed to external customer numbers.
- **Calls to internal numbers, using speed dial to internal numbers, and transferring to third parties work the same way as in standard Five9 domains**: Manual retyping in these cases is not required.

Skipping Records

Agents can be allowed to skip records which they preview. The permission is called User Can Skip Contact Records in TCPA Manual Touch dialing mode, and is configured in the Agent role through the Five9 Administrator application.

When the agent skips a record, a disposition must be selected from the campaign's configured Decline Preview Record Dispositions, and the system delivers the next record.

If the set preview time is reached before the agent dials a number, the agent's status is set to **Not Ready**.

No external number can be dialed automatically in the event of a preview timeout.

Removing Contact Records From a Running Campaign

An outbound campaign prepares for dialing by placing a selection of contact records from the associated list into cache, typically about 100 numbers. A telephone number that exists in cache may be dialed again during that campaign.

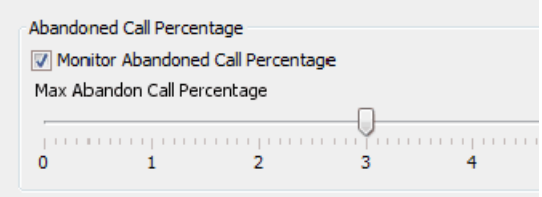
To ensure that a number is not dialed, assign a final disposition to that record. The final disposition prevents any future dial attempts for that number during that campaign. For more information, see **Managing Campaign Dispositions**.

Summary of Dialing Mode Features

This table lists dialing mode features and provides other options for each campaign dialing mode. Interpret the column headings as:

- PD = Predictive
- PW = Power
- PG = Progressive
- PV = Preview
- TCPA = Preview only

Options	PD	PW	PG	PV	TCPA
List Dialing Mode: These options define the principle by which the numbers are dialed within a list. There are two dialing modes available: • **Vertical Dialing**: The dialer attempts to call all numbers in one contact record and proceed to the next contact record. • **List Penetration**: The dialer attempts to call all numbers in the number 1 column, then dials number 2, number 3, and so on. See also Configuring the List Dialing Mode for Outbound and Autodial Campaigns	X	X	X		
Minimum Duration Before Redialing Number (HH:MM): Minimum time between calls to the numbers indicated in a contact record. This setting doesn't affect Redial dispositions with a Redial Timer until the system reaches the disposition's number of attempts. See *Number Redial Timeout*.	X	X	X	X	X
Call(s) To Agent Ratio: Number of phone numbers are dialed for an agent when the agent is ready for a new call. To keep agents as occupied as possible, the progressive and predictive modes automatically adjust the dialing pace without exceeding the configured maximum lifetime abandoned call percentage for the campaign. If your list has a lot of numbers that are not answered or you are dialing at a time of day when		X			

Options	PD	PW	PG	PV	TCPA
people aren't at home, you may want to set a higher Calls to Agent Ratio. If you set Calls to Agent Ratio too high it increases your dropped call rate (abandoned call percentage).					
Abandoned Call Percentage and Max Abandoned Call Percentage: Tracks the campaign's abandoned call percentage for the last 30 days (U.S.) or 24 hours (EU) or since the last reset using the Reset Dialer's Abandon Call % option, and slows the Dialer to keep the abandoned call percentage to the level selected with Max Abandoned Call Percentage.  FCC, FTC, and Ofcom regulations refer to dropped calls as *abandoned* calls. For telemarketing campaigns, adjust the Max Abandoned Call Percentage to match the federal requirements for abandonment. FCC and FTC telemarketing regulations require the abandoned call percentage for a campaign to 3% or less over 30-day periods. Ofcom uses the last 24 hour period (midnight to midnight). For Five9 customers to remain compliant with FCC or Ofcom regulations for abandoned calls in campaigns, custom dispositions aren't included in the calculation for the Abandoned Call Percentage. Refer to FCC or Ofcom regulations for current requirements and call abandonment rate calculation. For Power Mode, this setting works with Call to Agent Ratio by dialing fewer numbers at a time if the abandoned call percentage exceeds the Max Abandoned Call Percentage you select. You might select only an integer (whole number) for the percentage setting. If the abandoned call	X	X	X		

Options	PD	PW	PG	PV	TCPA
percentage exceeds the configured Max Abandoned Call Percentage, the dialing algorithms will try to gradually slow down dialing to keep the Max Abandoned Call Percentage for the last 30 days (U.S.) or 24 Hours (EU). In this case, you may experience longer agent wait times between calls.					
Monitor Abandoned Call Percentage: Enables the automatic throttling of the Call(s) to Agent Ratio to a lower setting if the system reaches the specified Dropped Call Percentage threshold.	X				
Unlimited Preview Time: Agents can take as much time as needed to make calls to the record.				X	X
Limit Preview Time: Limits the length of time an agent can preview a record. The timer appears on the bottom pane of the Agent application. The Action on Timeout selection determines what happens when the preview time expires.				X	X
Dial Number: Automatically dials the number for the preview record. For example, you might allow your agents to preview a record for 30 seconds before dialing. The first available number is dialed. The Agent application switches to the General tab automatically.				X	
Switch Agent to Not Ready: Places the agent in the Not Ready state if they don't dial within the configured preview time. The agent receives a notification after the timeout period.				X	X
Dial Immediately: Automatically dials the appropriate number for the preview record, without waiting for an agent to make a decision.				X	
Call Analysis: Enables you to filter out answering and fax devices: • **No Call Analysis**: All connected calls pass through, including those to answering and fax devices. • **Fax Detection Only**: The system prevents calls to fax machines, but passes the answering machines to agents. You can't change the	X	X	X		

Options	PD	PW	PG	PV	TCPA
detection speed because a fax is identified almost immediately after the number is dialed. • **Fax and Answering Machine**: The system prevents calls to fax machines and to most answering machines. After the call is answered, the voice is analyzed to differentiate a person from a recording. For recordings, you can set the campaign in one of two ways instead of sending the call to the agent: ◦ Hang up and dial the next number. ◦ Leave a message that contains dynamic information, such as the name of the contact spoken using Text-to-Speech, when used with IVR scripts. • **Fax and Answering Machine and Call Screening:** The system detects and appropriately handles fax, most answering machines, and call screening. • **Voice Detection Level:** If you select Fax and Answering Machine, this setting determines the time-out for analyzing the voice when a call is answered. See also: **Configuring Call Analysis for Outbound and Autodial Campaigns** **Important:** If your contacts hang up before calls reach your agents, set the Voice Detection Level to Fast. If this setting is not enough to resolve the problem, try disabling Call Analysis.					
Action on Answering Machine Detection - This setting applies to Fax and Answering Machine: • **Abandon Call:** By default, the dialer hangs up without leaving a message. • **Play Prompt:** To leave a recorded message, select this option, a prompt, and a maximum greeting time (seconds). See also: *About Prompts*. • **Play IVR Script (Advanced):** To connect the call to an IVR script, select this option and a script.	X	X	X		

Options	PD	PW	PG	PV	TCPA
See also: *About Interactive Voice Response (IVR)*.					
Action on Call Screening Detection - This setting defines how the system handles call screening-detected calls: • **Drop Call:** The system disconnects the call without leaving a message. • **Play Prompt:** The system plays a selected audio message to the recipient. • **Play IVR Script (Advanced):** The system runs a predefined IVR script. • **Connect with Agent:** The system transfers the call to an available agent when it detects call screening. This ensures that the system doesn't filter out call screening-detected calls and that agents handle them directly. The **Enable Advanced Mode** provides additional configuration options, such as **Call Screening Response Prompt** that enables you to select a specific audio prompt to play for call screening-detected calls, and **Max Wait Time Before Playing Response Prompt (secs)** that sets the delay before the response prompt plays.	X	X	X		
Preview Campaign Interrupt Options • Inherit domain settings for interrupt options, or • Enable incoming calls, transfers, and skill voicemail to interrupt contact record preview. Can't be used in Preview campaigns with Dial Immediately configured. When an agent switches to a Not Ready state after processing a voicemail which interrupted the preview task, no interruptions will occur in the current preview task.				X	X
• **Enable Lead Ownership Routing**: Automatically directs outbound campaign calls to the contact's assigned agent instead of distributing them across the general agent pool.				X	X

Options	PD	PW	PG	PV	TCPA
• **Validate Lead Ownership Agent Skills**: Verifies whether the agent is assigned to a skill associated with the outbound campaign before a lead ownership task is assigned to an agent. For more information on lead ownership routing, see Lead Ownership in Advanced Campaign Manager. **Note:** This feature is currently available for early adopters and may not be visible in your domain. Contact your Five9 representative for additional information.					
Action on Max Queue Time Expiration - Action on Max Queue Time Expiration occurs when the Max Queue Time (See Campaign Profiles: *Selecting General Settings*) expires because there are no agents available to take the call. Select the following actions via this menu: • **Abandon Call:** The default selection. • **Play Prompt:** To play a recorded message, select Play Prompt, and choose a previously uploaded prompt. This feature give you control over setting a *safe harbor* message and enables you to configure different messages for each campaign. See also, About Prompts. • **Play IVR Script (Advanced):** Use this option to connect the call to an IVR script for further actions. An example would be an IVR script to play a recorded Safe Harbor message plus present options for adding the number to the domain DNC list. See also,Interactive Voice Response (IVR) Administrator's Guide. For telemarketing campaigns, you may need to record a safe *harbor* message for abandoned calls and play it as a prompt.	X	X	X		
Action on No Input Timeout - This setting decides what happens when Answering Machine Detection (AMD) classifies a call as unknown and call analysis indicates no caller input within the	X	X	X		

Options	PD	PW	PG	PV	TCPA
allotted detection level in seconds. • **No Action:** The system does nothing and continues the call flow (default). • **Drop Call:** The system ends the call immediately. When you select this option, the system doesn't generate a bridge request to connect the called party with an agent, and doesn't increment the bad calls counter.					

List Dialing Mode.

- **Vertical Dialing**: The dialer attempts to call all numbers in one contact record and proceed to the next contact record.
- **List Penetration**: The dialer attempts to call all numbers in the number 1 column, then dials number 2, number 3, and so on.
- **Extended Strategy**: Customizes the dialing pattern to focus on contacts that are more important to the business.

  See Configuring the List Dialing Mode for Outbound and Autodial Campaigns.

Minimum Duration Before Redialing Number. The minimum time that should pass between calls to the numbers indicated in an individual Contact record. Use this setting for adjusting the interval between redialing a record in Vertical Dialing mode. This setting does not affect Redial dispositions with a Redial Timer until the system reaches the disposition's Number of Attempts. See Setting the Time-Out for Redialing Numbers.

Call Analysis

Voice Detection Level. An agent connects to the call after the system detects voice. Adjust the voice detection level to set the accuracy of answering machine detection. A setting at or closer to Fast detects fewer answering machines, while a setting closer to Accurate detects more answering machines. However, the Accurate setting might also increase the delay in delivering a call to an agent or starting your recorded message after the call is answered.

The seconds marks on the Voice Detection Level slider indicate the maximum time-out interval, after which a call that is not yet determined to be a person or an answering machine passes to an agent. In most cases, the Answering Machine Detection system attempts to determine faster than the indicated cut-off period.

Agent Availability. This option allows the Autodialer Campaign to dial only when agents are available to handle calls. If you uncheck this option, the system dials the list continuously regardless of agent availability. Check Dial only, and select Any Agent or a skill. You can select the following conditions to make the autodialer call the dialing list:

- **Dial Only if Agents Are Available in the Following Skill Group**: The campaign pauses dialing, based on agent availability, and resumes dialing when one or more agents become available within the skill chosen in the drop-down menu. Select Any Agent to stop dialing if there are no agents available in any skill group.
- **Ready to Receive Calls**: The dialer dials only if one or more agents are available, ready, and not on call.
- **Ready to Receive Calls or Busy** : The dialer dials only if one or more agents are logged-in and are either ready or busy with another call (on call or wrapping up). In this case agents shouldn't be counted as busy if they're making a manual call and were on break before this.
- **Logged In**: The dialer dials only if one or more agents are logged in and in any state. If the system meets the configured agent availability setting, the Autodial campaign makes a fixed number of calls, regardless of how many agents are available. There is no Calls to Agent Ratio for Autodial campaigns.

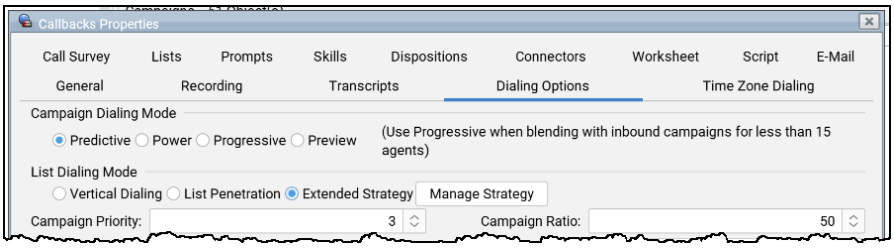
Dialing Rules

Apply dialing rules to outbound and autodial campaigns. The dialer ignores numbers in the specified states during specified days/hours. You can configure dialing rules in the global settings, based on the values in the state contact field. Before using the rules, ensure that the state field isn't empty in your lists and that it corresponds to the value specified in Dialing Rules options. See Configuring Dialing Rules in the Basic Configuration Administrator's Guide.

Configuring the List Dialing Mode for Outbound and Autodial Campaigns

The dialing method defines how the dialer processes contact records in the dialing lists assigned to the campaign.

Using Vertical List Dialing
Using List Penetration Dialing
Processing Dialing Lists with an Extended Dialing Strategy



The dialing process goes through the lists that were added during the outbound campaign configuration. We describe the dialing process in terms of the contact records, but only the contact records that belong to the dialing list added to the campaign are dialed.

The Dialing mode options are not available in Preview Campaign Dialing Mode (see **Preview Dialing Mode**).

The descriptions below assume you are using multiple phone numbers per record. You should always use List Penetration Mode if your lists have only one phone number per contact record or if most records have only one phone number.

The Campaign Profile associated to the campaign can influence on how the lists are dialed. In the Campaign Profile settings, you can select which numbers are dialed (Number1, Number2, Number3) and in what order.

Using Vertical List Dialing

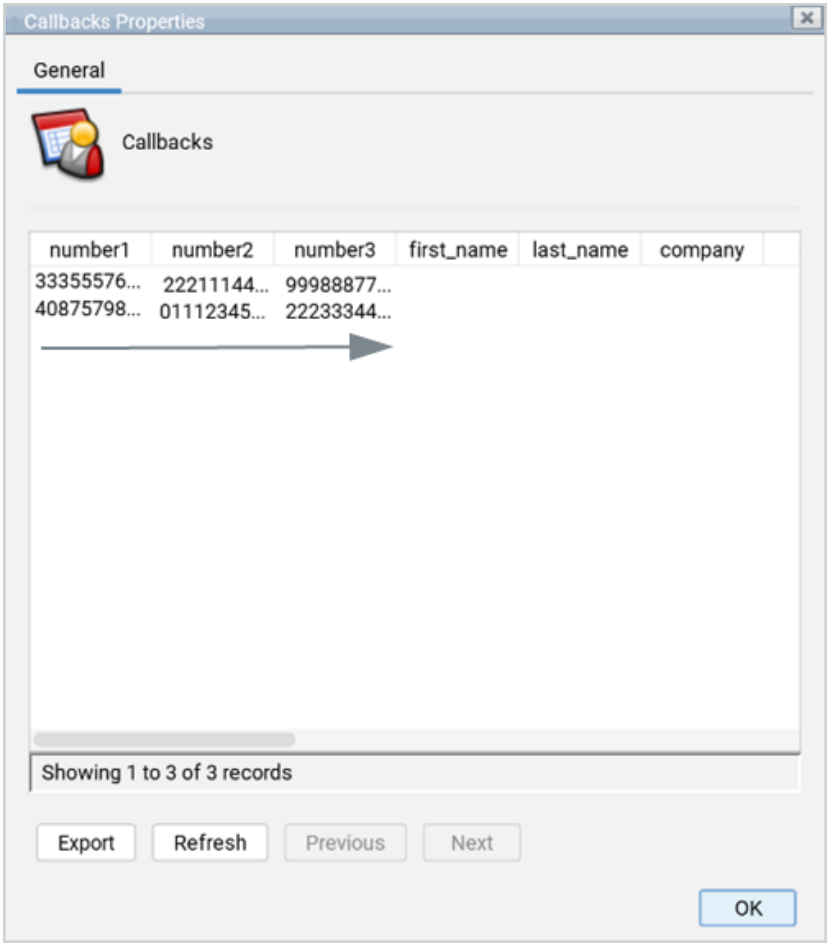
In Vertical Dialing mode, the purpose is to reach the maximum number of contacts (CRM records). The dialer attempts to call all numbers in the contact record and proceed to the next record. The goal is to reach each contact as soon as possible. It dials each available number for a list record (unless one of them has reached final disposition) before proceeding to the next record in the list. Choose this mode in these cases:

- If the first number is considered (dialed or skipped) and does not result in a final disposition for the contact record, the next number is considered immediately.

- After all numbers for the contact are dialed or skipped the system waits the minimum duration (Configured on the Dialing Options Tab) and try the record again.
- The system considers the contact again as soon as the minimum duration has elapsed, regardless of list position.

1 Select the **List** tab and double-click a list.

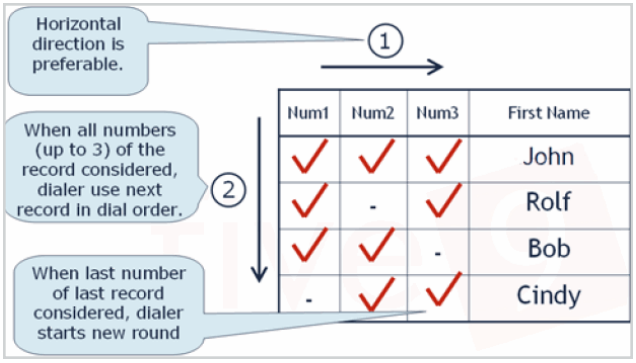
The dialer dials all numbers from the first contact record. Then it proceeds to the second record.



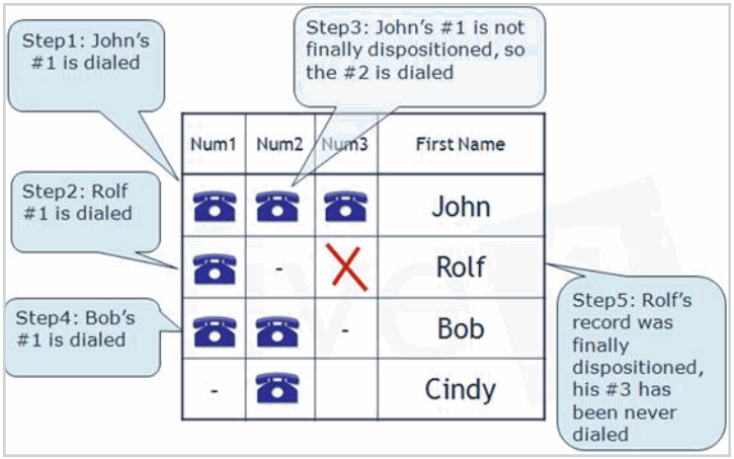
2 The system considers the contact again as soon as the Minimum Duration Before Redialing Number (option on the Dialing Options tab of Campaign Properties) has elapsed, regardless of list position. Disposition redial setting can affect this dialing behavior. See also, **Configuring Dispositions**. In reality, the system moves to the following records when dialing for multiple agents.

3 When the last contact record in the list is dialed, the dialer starts a new round following the above described process.

Example 1



Example 2



Using List Penetration Dialing

In List Penetration dialing, the main purpose is process the list quickly by dialing the first phone number for each record before moving to the second phone number. The dialer attempts to call the first number for every contact in the list, then number 2, number 3, etc. List Penetration is the default dialing mode. The goal is to process the list quickly by attempting one number for each record before moving to the second and third numbers.

When to Use List Penetration Dialing
The List Penetration Dialing Process
Adding Records During List Penetration Dialing

When to Use List Penetration Dialing

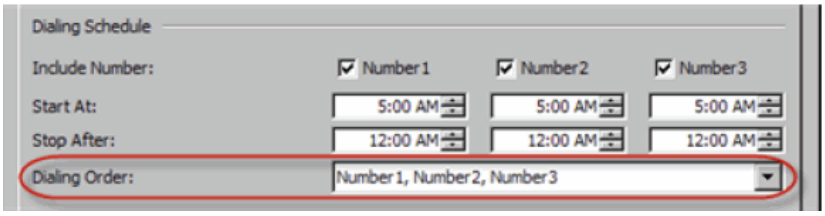
Use List Penetration dialing when you have only one phone number for each contact record.

- If the first available number in a record is considered (dialed or skipped) and does not result in a final disposition for the contact record, the next available number is considered on the next pass through the list, even if the minimum duration has not elapsed.
- If all numbers for the contact have been considered (dialed or skipped), and the contact record is encountered again in list order and the minimum duration has not passed, the record is skipped and considered again on the next cycle through the list.
- The main difference between vertical dialing and list penetration is vertical dialing dials the contact immediately after the Minimum Duration has elapsed while list penetration waits until the contact is encountered again in the list.
- However, if a number for a contact is assigned a disposition with a redial timer, such as the Busy disposition, the system does not move to the next number until that number is dialed again.

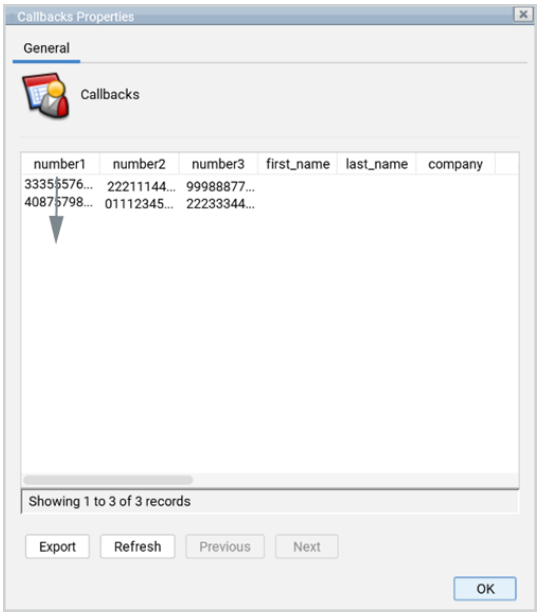
The List Penetration Dialing Process

1. During the first cycle, the dialer dials all the records from the contact record database using the first available phone number from the dialing order specified in Campaign Profile Properties.

   In the example below, the following dialing order is set: Number1, Number2, Number3.



   The dialer starts at number1.



2 For consecutive cycles, the dialer considers the records' next phone numbers in the specified dialing order (in Campaign Profile), if they are available, one number per record per list cycle. In the example below, number2 is dialed after the first list cycle.

3 During the third cycle, number3 is used. In the following example, the number3 field is taken.

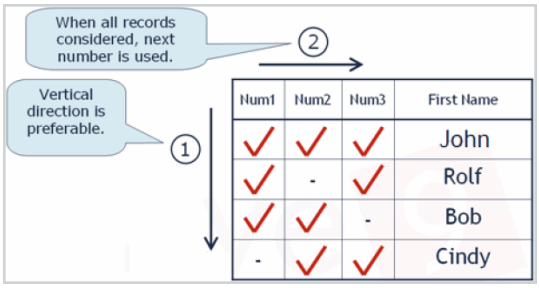
4 When all numbers from all records have been dialed or skipped, the dialer starts the next round with the first available phone number from the dialing order specified in Campaign Profile Properties and repeat the above dialing process, skipping any numbers which have not met the Minimum Duration Before Redialing Number (option on the Dialing Options tab of Campaign Properties).

5 If a record is assigned a final disposition, no further attempts are made on any of the phone numbers for the record for the campaign.

Note

Although the physical direction of the dialing is vertical in List Penetration Mode, the industry term Vertical Dialing actually refers to dialing numbers horizontally across.

Example



Adding Records During List Penetration Dialing

You can add records during a running campaign without interrupting the campaign. In most cases, the new records are dialed in the current dialing cycle, in the requested order, no more than 15 minutes after insertion into the campaign dialing list.

Following the dialing of newly inserted records, the dialer resumes at the pre-insertion list position to consider the records that have not been dialed in the current dialing cycle. If an outbound campaign that is set for list penetration dialing is out of numbers, it may take up to 30 minutes for the campaign to begin dialing the inserted numbers.

Processing Dialing Lists with an Extended Dialing Strategy

The extended dial plan strategy allows you to reach contacts while they are fresh and during a time span when they are likely to be more important to the business.

The Extended Dialing Strategy is similar to the vertical dialing strategy. It first dials all the numbers for a contact record, before moving to the next record. However, the Extended Dialing Strategy allows you to configure varying recall strategies over time.

The Extended Dialing Strategy allows administrators to specify how often and when to go back and dial important leads again instead of first processing to the end of the list. You can tailor campaigns to prioritize calls based on the importance of each contact to the targeted business goals of that campaign.

- By default, a simple extended dialing strategy is already defined.
- You can define up to twenty extended dialing strategies per campaign ad run any number of them at any one time.
- You must always have a default strategy defined.
- At a minimum, the Default strategy must be running.

- You may delete any strategy that you no longer need, but you cannot delete the Default strategy.

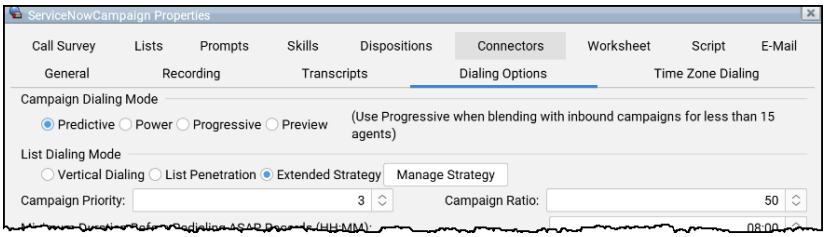
Selecting the Dialing Strategy
Defining the Extended Dialing Strategy

Selecting the Dialing Strategy

1 Navigate to **Campaigns** > **Configure** > **Dialing Options** tab.

2 Select the **Predictive Campaign Dialing Mode** and **Extended Strategy**.

You can create an extended dialing strategy for Predictive, Power, or Progressive dialing modes.



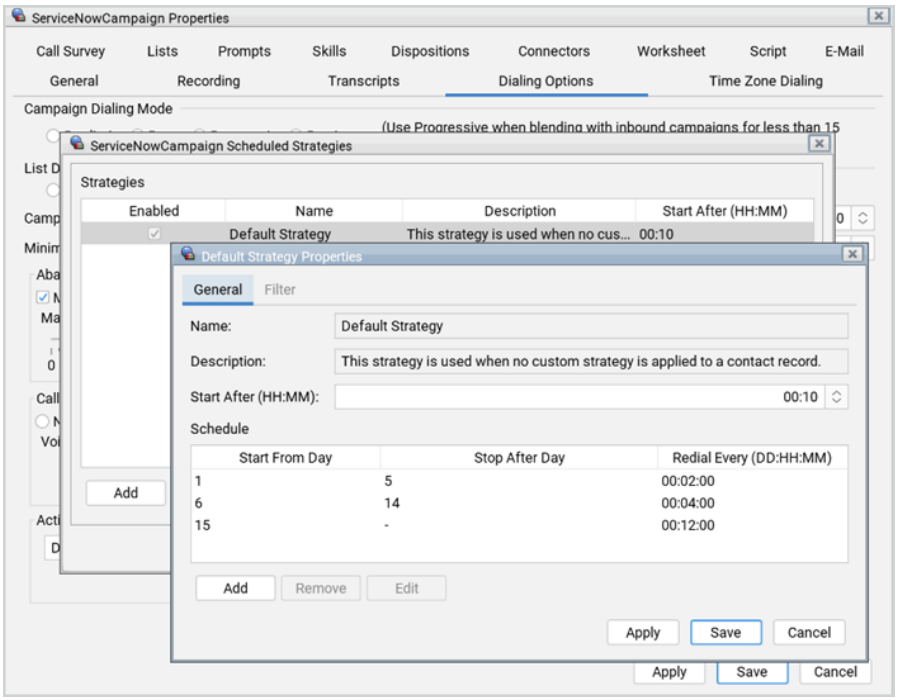
3 Click **Manage Strategy** to open the configuration screens.

Defining the Extended Dialing Strategy

The first step is to define the parameters the extended dialing strategy will follow. The strategies menu contains a default strategy that has these settings:

Name	Default Strategy
Description	This strategy is used when no custom strategy is applied to a contact record
Start After (HH:MM)	00:10 (which means it will apply after 10 minutes to any new contact added to the list that meets the filter criteria for the strategy.)
Schedule	Three schedule rules are set for the Default strategy: **Start From Day**: 1 **Redial Every** (DD:HH:MM): 02:00 **Start From Day**: 6 **Redial Every** (DD:HH:MM): 04:00 **Start From Day**: 15 **Redial Every** (DD:HH:MM): 12:00

When the **Strategy Properties** screen opens, the default values are displayed. You can use the default values or customize them for your strategy.



Strategy Properties General Settings

Name	Provide a name for the extended dialing strategy you are creating.
Description	Provide a meaningful description for the extended dialing strategy.
Start After (HH:MM)	Indicate how long after you add a contact to the list that meets the define filter criteria for the strategy the dialing should begin.
Schedule	Set the dialing schedule. You can include multiple redial attempts. **Start From Day**: Indicate the day of the campaign to start dialing the list. • Possible values: 1 through 365 • The first Start From Day value is always 1. • Must be unique for a schedule. You cannot configure 2 timeouts for the same interval. **Stop at Day**: The Stop After Day field cannot be edited. It is calculated based on the start day of the subsequent dialing period, minus one day.

	Redial Every (DD:HH:MM): Specify how often during this dialing period to redial contacts if no live person answers. Set up as many dialing periods as appropriate for the campaign and this strategy.

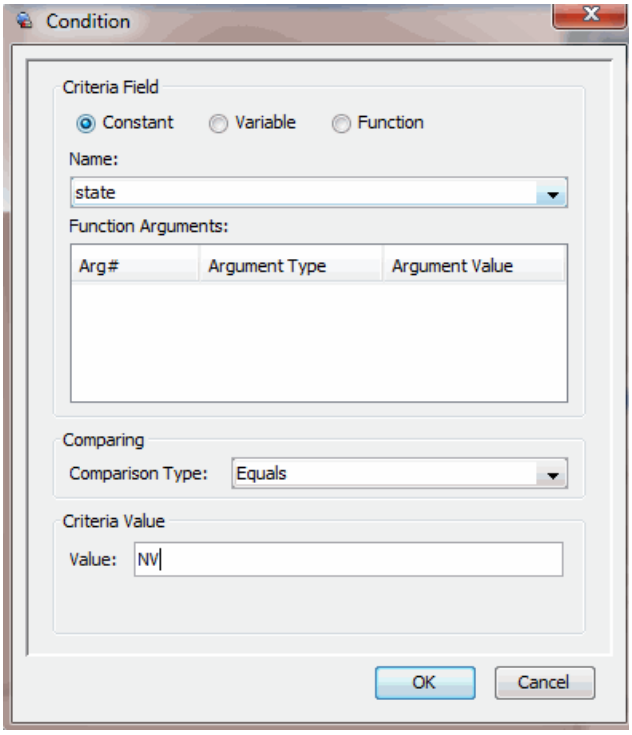
Filter

Condition Grouping	Select All, Any, or Custom. **All** = Match all characteristics **Any** = Match any of the characteristics **Custom** = Match characteristics defined in an expression to identify the contacts to be redialed.
Expression	For a Custom contact grouping, enter a simple expression to define the criteria based on attributes of contact records in the dialing list. For example, you might want to classify contacts as highly important if they attended a certain trade show, and they have purchased more than $1000 of goods from your company in the past year. The expression might look like this: >1000 2014 + Tradeshow West or Age > 55 + State = NV

To define the conditions for your expression, follow these steps.

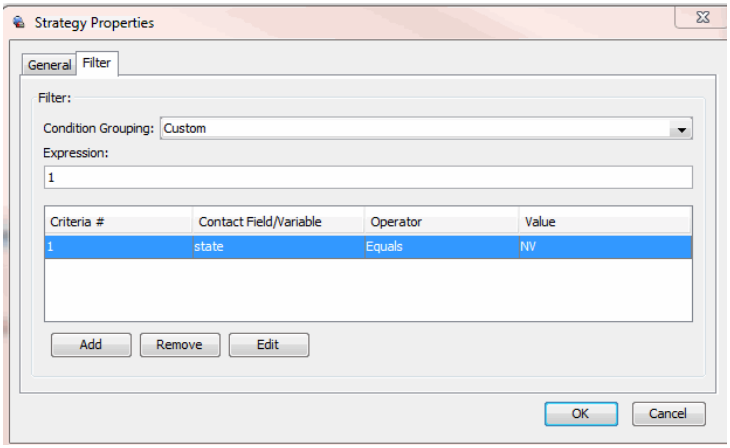
1 After you define the expression, click **Add** to display the **Condition** screen.

You are prompted to define the conditions you have included in the expression.

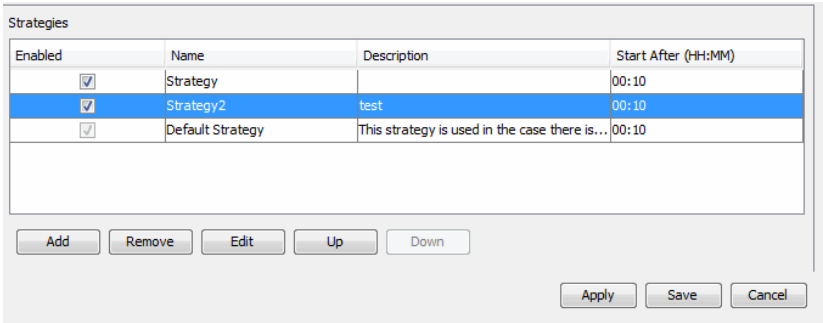


2 Select the **Comparison Type** from the drop-down list and define the **Criteria Value**.

The **Strategy Properties** screen is populated with the values that you have defined.



3 Click **OK** and the new strategy appears in your **Scheduled Strategies** screen.



- You can create and schedule up to 20 strategies for any campaign.
- Strategies are applied according to their priority. That is, the strategy highest in the list has the highest priority.
- Use the Up/Down button to move a strategy up or down in the list to change its priority.
- Only one strategy is applied to any contact record at a time.
- To edit a defined strategy, select the strategy and click Edit. You will be prompted to edit the conditions.
- Call disposition permissions set in the system disposition **Caller Disconnected Properties** screen of the Dispositions configuration take priority over criteria defined in an Extended Dialing Strategy. See *Types of Dispositions* in Basic Configuration Administrator's Guide.

Setting the Time-Out for Redialing Numbers

This option, Minimum Duration Before Redialing ..., is located in the Dialing Options tab of the Campaign Properties. It defines the time interval before a phone number in a list can be considered for redialing. The default value is 10 minutes.

Vertical Dialing with Number Redial
List Penetration Dialing with Number Redial
Extended Strategy

This setting takes priority over a lower Activate After timer for Do Not Dial Number for Campaign type dispositions. Numbers with such dispositions cannot be redialed until the minimum duration before redialing has passed. However, a lower Redial Timer for Redial Number type dispositions takes priority. It ignores the minimum duration before redialing until the maximum number of redial attempts for the disposition is reached.

This setting does not set the wait time between phone numbers for a contact record. However, if two phone number fields for a record are identical, the setting applies to fields. Numbers may be skipped for several reasons, such as being outside the dialing hours or in a do-not-call list.

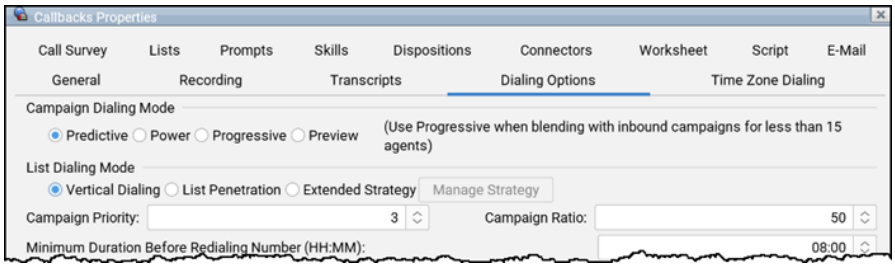
The main difference between vertical dialing and list penetration is that vertical dialing dials the contact immediately after the minimum time has elapsed while list penetration waits until the contact is encountered again in the list.

In either List Dialing Mode, if a number for a contact is assigned a disposition with a redial timer, the dialer does not move to the next number until that number is redialed. For example, this may occur with the default settings of the Busy disposition, which has a redial timer is.

Vertical Dialing with Number Redial

This option is named Minimum Duration Before Redialing Number. If the first number is dialed or skipped but does not result in a final disposition for the contact record or in a redial disposition with a timer, the next number is considered immediately.

After all numbers for the contact have been dialed or skipped, the dialer wait the minimum time before retrying the record's first number. The dialer redials or skips the contact as soon as the minimum time for any of the numbers has elapsed, regardless of list position.



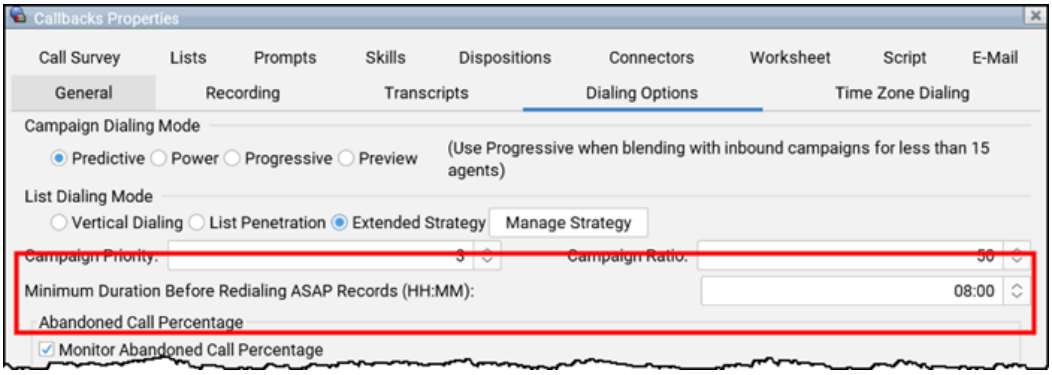
List Penetration Dialing with Number Redial

This option is named Minimum Duration Before Redialing Number. If the first number is dialed or skipped but does not result in a final disposition for the contact record or a redial disposition with a timer, the record's next number is considered on the next cycle through the list.

If all numbers for the contact have been dialed or skipped, and if the contact record is encountered again in list order, but the minimum time has not elapsed for the number, the record is skipped. It will be reconsidered during the next cycle through the list.

Extended Strategy

This option is named Minimum Duration Before Redialing ASAP Records. If the number is dialed or skipped but does not result in a final disposition for the contact record or a redial disposition with a timer, the number is redialed as soon as possible after the time-out that you set regardless of the number's position in the list.



Configuring Call Analysis for Outbound and Autodial Campaigns

Use the Call Analysis section of the Dialing Options tab to configure outbound and autodial campaigns to automatically filter answering and fax machine connections and increase the delivery of human interactions to your agents. Call screening is an additional capability you can enable in this section by selecting the call screening detection option.

> **Note:** Call screening detection is only available for outbound campaigns. It isn't supported in autodial campaigns.

Answering Machine Detection (AMD)

AMD optimizes outbound calling campaigns by ensuring that human agents are only engaged for human interactions. AMD is a crucial part in outbound calling systems to save costs and time, and reduce agent fatigue and resources. AMD leverages audio signal analysis to differentiate between calls answered by a human, answering machine, and other devices (for example fax machines).

AMD Workflow

1. **Call Initiation**: Your autodial campaign starts the outbound call.
2. **Detection**: On answer, the system gathers data for the first few seconds.
3. **Call Analysis**: The system determines whether the connection is to a human or other device by using voice pattern, beeps, tone, pitch, cadence, and background noise analysis. Analysis is language agnostic and doesn't use commonly used phrases in voicemail greetings.
4. **Action**:

- Human voice detected: Transfers the call to an available agent.
- AMD and other devices detected: Plays a recorded message, leaves a voicemail, or hangs up, as set in the Fax Call Analysis options.

Configuring Call Analysis for Answering Machine

Use Call Analysis in your outbound and autodial campaigns to listen for the call to connect to a human before transferring the call to an agent.

To configure outbound and autodial campaigns to automatically filter AMD calls:

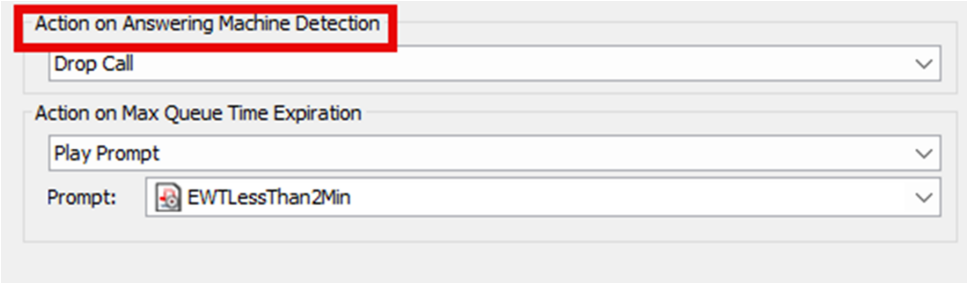
1 Open the Campaign Properties for your campaign, and select the **Dialing Options** tab.

2 Set the **Call Analysis** options.

- **No Call Analysis:** The system won't analyze calls. All connected calls, including answering machines and fax machines, go to agents. No Call Analysis is the default setting.
- **Fax Detection Only:** The system disconnects fax machines but forwards AMD and humans connections to agents.
- **Fax and Answering Machine**: The system removes fax and most AMD connections. On connection, the system voice analysis determines whether it's a person or recording. A recording causes the system to hang up without sending the call to the agent. You can play audio prompts or IVR scripts for answering machines and abandoned outbound calls on Max Queue Time Expiration.

> **Note:** Do not select **Fax and Answering Machine and Call Screening** if you want to detect fax and answering machine calls only.

3 Select from these options in the **Action on Answering Machine Detection** menu:



- **Abandon Call**: By default, the system hangs up without leaving a message. The Drop Call option displays as **Drop Call** for AMD and **Abandon Call** for **Max Queue**

Time Expiration, and are correctly reported as abandoned calls.

- **Play Prompt**: Select the prompt to play.
- **Play IVR Script (Advanced)**: Select the IVR script to run. You can configure your campaigns to automatically leave answering machine messages without having to connect an agent to the call, and use dynamic information (such as speaking the name of the contact, using TTS) in IVR scripts. Use this feature for advanced outbound communications to contacts.

  Select the audio prompts or IVR scripts to use **Action on Max Queue Time Expiration** for Safe Harbor messages or advanced outbound communications for contacts with an existing business relationship. The queue time expiration results in abandoned and dropped calls. This occurs when a dialed number connects but no agents are available to accept the call. Calls may be abandoned when dialing many lines per agent. For option details see, **Outbound Campaign General Properties**.

  The outbound dialer always filters out unanswered calls such as busy signals, no answer, and operator intercepts. As all answering machines aren't detected, some still reach your agents.

  For autodial campaigns, the active IVR script handles any resulting call flow.

4 Set the **Voice Detection Level**.

- **Fast**: Performs the quickest test (typically, two seconds), which enables more answering machines through to agents.
- **Normal**: Performs a 4.5-second analysis to optimize differentiation of human and typical answering machine responses.
- **Accurate**: Performs a 10-second analysis to detect more answering machines but might slow delivery of calls to agents.

5 Select **Save**.

Call Screening Detection

When the system detects call screening during outbound campaigns, it can drop the call, or play a prompt, or run an IVR script, or connect the call to an agent.

> **Note:** This feature is currently available for early adopters with domains hosted in the US, and may not be visible in your domain. Contact your Five9 representative for additional information.

Important

Call screening detection applies only to outbound campaigns; autodial campaigns don’t support it. The call screening feature currently supports only American English, British English, and Australian English Siri voices. The feature supports Apple iPhone devices running iOS 26 when users enable the native Apple call screening experience. It doesn’t support Google Pixel devices at this time.

Call screening on iOS 26 devices is evaluated on a per-call basis. Even when the call screening feature is enabled on an iOS 26 device, there is no guarantee it will get triggered for every incoming unknown caller.

Call Screening Workflow

This workflow outlines how Five9's call screening detection feature operates during outbound campaigns. From call initiation to final disposition, the system uses advanced audio analysis to decide the nature of the connection and execute the appropriate action, ensuring efficient call handling and maximizing agent productivity.

1. **Call Initiation**: Your outbound call campaign starts.
2. **Detection**: On answer, the system gathers data for the first few seconds.
3. **Call Analysis**: The system determines whether the connection is to a call screening-enabled device.
4. **Action**: When the system detects call screening, it can drop the call, or play a prompt, or execute an IVR script, or route the call to an agent, based on the configured actions.

Configuring Call Analysis for Call Screening

Use the Call Analysis section in the Dialing Options tab to configure how your outbound campaigns handle call screening.

Important: Call screening configuration isn't available for autodial campaigns. The call screening feature currently supports only American English, British English, and Australian English Siri voices. The feature supports Apple iPhone devices running iOS 26 when users enable the native Apple call screening experience. It doesn’t support Google Pixel devices at this time.

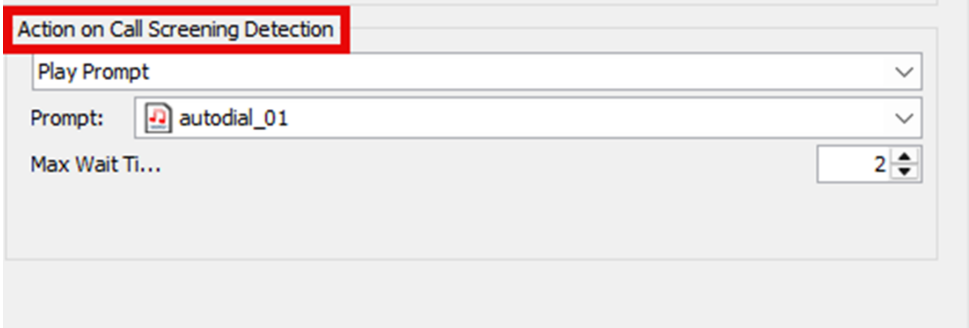
To configure call screening detection:

1 Open the Campaign Properties for your outbound campaign.

2 Select the Dialing Options tab.

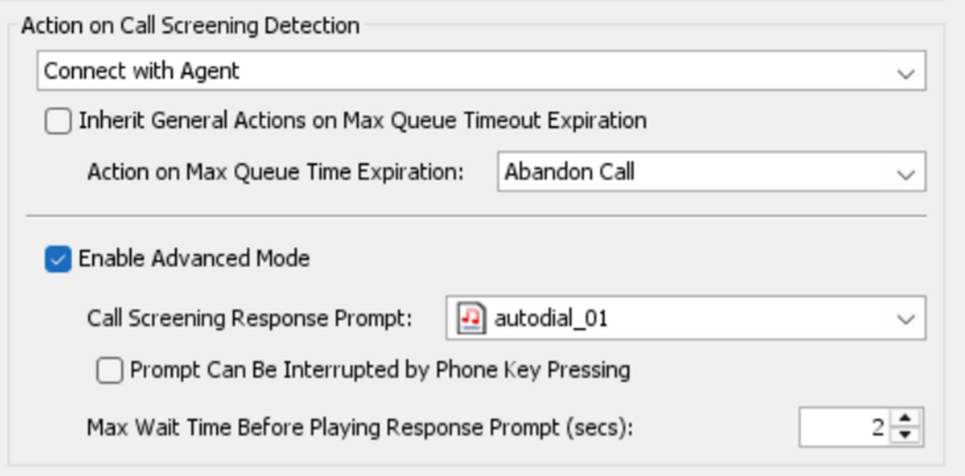
3 Select the **Fax and Answering Machine and Call Screening** option under Call Analysis to enable the system to detect and appropriately handle fax, most answering machines, and call screening.

4 Set the **Action on Call Screening Detection** to define how the system handles call screening-detected calls.



- **Drop Call:** The system disconnects the call without leaving a message.
- **Play Prompt:** The system plays a selected audio message to the recipient.
- **Play IVR Script (Advanced):** The system runs a predefined IVR script.
- **Connect with Agent:** The system transfers the call to an available agent when it detects call screening. This ensures that the system doesn't filter out call screening-detected calls and that agents handle them directly.

  When you select this option, the system displays a setup interface that includes the following fields and functions:



- **Inherit General Actions on Max Queue Timeout Expiration:** When you select this option, the system applies the general timeout actions and automatically disables the **Action on Max Queue Time Expiration** setting.

  When you don't select this option, **Action on Max Queue Time Expiration** remains enabled and lets you specify what happens when a call exceeds the maximum queue time, such as dropping the call, playing a prompt, or executing an IVR script.

- **Enable Advanced Mode:** When you select this option, the system displays more configuration options.

  Call Screening Response Prompt enables you to select the audio prompt that plays for call screening–detected calls.

  Prompt Can Be Interrupted by Phone Key Pressing appears after this setting and enables the called party to interrupt the audio prompt by pressing any phone key. When a called party presses a key, the system stops the prompt immediately and connects the called party to an agent. This checkbox is disabled by default. When it remains disabled, the system plays the entire prompt before it connects a called party to an agent.

  Max Wait Time Before Playing Response Prompt (secs) sets the delay before the system plays the audio prompt.

Important: The system displays the warning **Changing these settings may result in non-compliance with appropriate telemarketing regulations. Please consult your compliance officer if you are unsure**

> **about applicable laws** when you try to change the action to **Play Prompt**, **Play IVR Script (Advanced)**, or **Connect with Agent**.

5 Set the Voice Detection Level.

- **Fast**: Performs the quickest test (typically, two seconds), which allows more answering machines to reach agents.
- **Normal**: Performs a 4.5-second analysis to optimize differentiation of human and typical answering machine responses.
- **Accurate**: Performs a 10-second analysis to detect more answering machines but might slow delivery of calls to agents.

6 Select **Save**.

Call Analysis Duration Best Practices

The default setting is **No Call Analysis**. Because the analysis takes some time to perform (up to 10 seconds), using any type of call analysis delays call delivery to agents. If it's important that agents hear the first hello, don't select the **Fax and Answering Machine** option or use the **Fast - 2 sec** Voice Detection Level setting.

To use call analysis, select the **Fax and Answering Machine** (always enabled for autodial campaigns) or **Fax and Answering Machine and Call Screening** option and set the Voice Detection Level.

> **Important:** Any change to these settings may result in non-compliance with telemarketing regulations. If you're running telemarketing and cold call campaigns, consult the telemarketing regulations before using this feature. It may be illegal to broadcast messages or you may have to play a Safe Harbor message for abandoned calls.

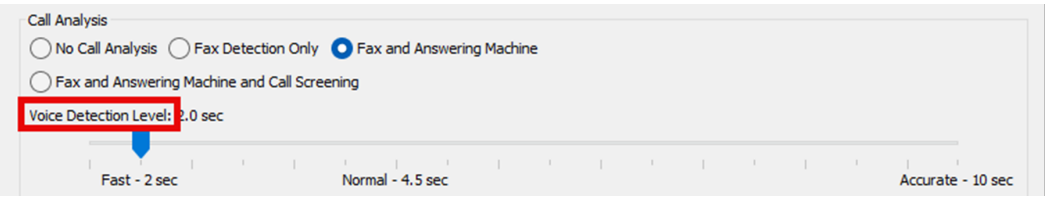
Based on internal testing and customer feedback, setting the Voice Detection Level from **4.5–10 seconds** yields the best call analysis results. Note that longer durations don't make calls take longer to route to agents.

> **Note:** Call analysis always connects the call to an agent when it's confident a human voice answered. Call analysis then handles the call accordingly and as quickly as possible.

Important: Call analysis isn't a foolproof solution. We recommend using the call analysis feature just as a tool to assist in call handling and routing decisions. Call analysis performance varies with external factors, such as audio signal quality, answering machine or voicemail system characteristics, and environmental variables. Voicemail greetings greatly vary in length, content, speech patterns, background noise, and signal quality, making it difficult for call analysis to classify with the highest level of confidence between live human and answering machine connections.

Voice Detection Level Settings

Set up test campaigns to try various Voice Detection Level settings to ensure that your outbound and autodial campaigns perform well in your environment.



- While the **Fast - 2 sec** setting provides swift decision making and often has very little time for call audio signal pattern analysis, which can sacrifice accuracy compared to a longer analysis, some percentage of connected calls always result in *false negatives*, where a call is incorrectly identified as answered by a human. By using the **Fast - 2 sec** setting, you are prioritizing speed and efficiency over accuracy, which is a great factor in contact center environments where minimizing call handling times is critical.

- The **Normal - 4.5 sec** setting strikes a balance between the need for accurate classification and minimizing call handling time. By analyzing the audio signal for a reasonable duration, the system can make timely classification decisions while still capturing enough information to accurately differentiate between human and machine responses. The **Normal - 4.5 sec** setting provides efficient and reasonably accurate classification of connected calls, and helps optimize call handling processes. Use this setting to get started.

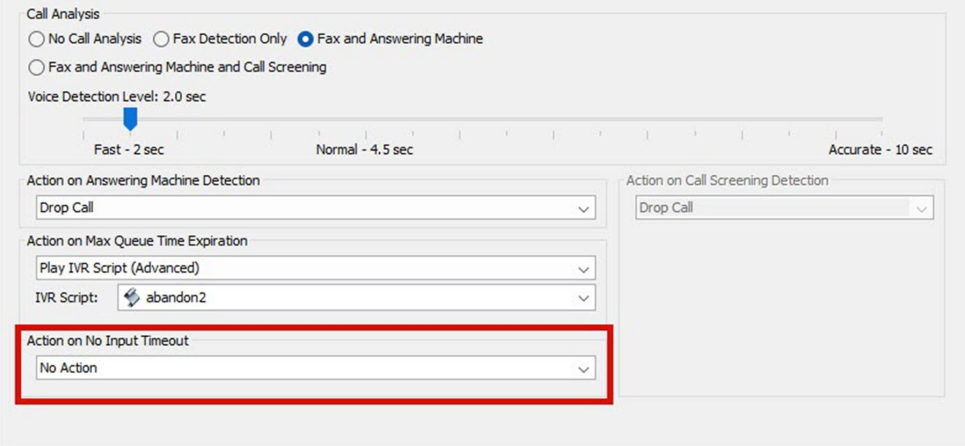
- The **Accurate - 10 sec** setting places focus on accuracy and precision. Ten seconds provides the system time for a more thorough analysis of the call audio signal, which can result in more accurate determinations of whether the connection is human or machine. This reduces the chance of misclassified calls, leading to more appropriate routing or handling. With a longer analysis time, the

system has more data for an informed decision. This reduces *false positives*, where a call is incorrectly identified as answered by a machine, and missed opportunities for direct customer interactions.

- You can view and configure voice detection levels down to a minimum value of 1.5 seconds. If you require this optional behavior, contact your Five9 account manager.

  When you select a voice detection level below 2 seconds, the system warns you that lowering the threshold significantly reduces the accuracy of the AMD algorithm. The shortened call analysis window limits the system's ability to distinguish between a live voice and an automated message, causing it to misclassify more voicemail messages as live calls and route them to agents. To maintain optimal AMD performance, keep the voice detection level at 3.5 seconds or higher.

- You can also configure the **Action on No Input Timeout** setting, which decides what happens when AMD classifies a call as unknown and call analysis indicates no caller input within the allotted detection level in seconds. By default, the system takes **No Action** and continues the call flow. Or you can select **Drop Call**, which ends the call immediately. When you select this option, the system doesn't generate a bridge request to connect the called party with an agent, and doesn't increment the bad calls counter.



Note

Reported Call Analysis Duration May Exceed the Configured Voice Detection Interval

The voice detection interval configured at the campaign level defines the maximum amount of active speech time the system uses to detect positive speech for each call. This interval begins only after the system detects speech from the called party.

In many real world scenarios, calls begin with a period of silence, for example, when the called party doesn’t speak or respond immediately. During these silent periods, no speech is available for analysis, and the voice detection interval is not consumed.

As a result, the total observed call analysis duration may exceed the configured voice detection interval, even though the system doesn't exceed the speech analysis time allotted for the campaign.

Configuring Campaign Priority and Ratio Settings

Campaign priority and ratio are optional features that enable you to manage your outbound campaigns based on their importance in your business. To use these features, they must be enabled in the Campaigns tab of the configuration menu of the VCC Administrator application.

To enable these settings in your outbound campaigns, select the **Dialing Options** tab. You may also create work flow rules based on time or events to automate the changes in modes, priorities, and ratios.

Configuring Campaign Priority
Configuring Campaign Ratio
Combining Campaign Priority and Ratio

Note

Campaign priority takes into account the number of agents when calculating call-to-agent ratio. Therefore, priority is applied more precisely when many agents are available instead of few agents. For optimal performance, use campaign priority and ratio settings in campaigns staffed with 10 or more agents.

Configuring Campaign Priority

You can prioritize when your running outbound campaigns are dialed based on the business value of each campaign. Changes to campaign priority are implemented as soon as you save your changes. The default campaign priority (3) is automatically assigned unless you apply a different one. You are prompted to reset the priority whenever you start the campaign. You may assign a priority from 1–99.

Example

Campaign A priority = 1. Campaign B priority = 3.

Campaign A is dialed until no numbers can be dialed immediately; campaign B is dialed in the same manner.

Depending on the availability of numbers, the dialer alternates between campaigns as needed.

However, priorities may be ineffective for multiple campaigns where a wide difference in the number of skilled agents.

Example

Campaign A with priority 1 has one available agent.

Campaign B with priority 3 Skill2 has 10 available agents.

Campaign A makes a call. Its one agent is busy.

In the meantime, campaign B starts to make calls and continue until campaign A is ready to make another call.

When the agent in campaign queue A finishes the call, campaign A makes another call.

Although campaign B has lower priority, it is busier because it has 10 agents. Priority is ignored if the campaign has only one agent.

Configuring Campaign Ratio

You can assign dialer resources spent on your running outbound campaigns based on their importance in your business. Changes to campaign ratio are effective immediately. The default setting for campaign ratio is 50 when campaign ratio is enabled in your domain. The range is 1–99.

If you use campaign ratios, you must assign a ratio to the campaign before running it the first time. Otherwise the default ratio of 50 is assigned. You are prompted to reset the ratio whenever you restart the campaign.

Example

- Campaign A ratio = 60.
- Campaign B ratio = 50.
- Campaign C ratio = 20.

130 dialing attempts are made:

- Campaign A: 46% of dialing attempts (60/130)
- Campaign B: 39% of dialing attempts (50/130)
- Campaign C: 15% of dialing attempts (20/130)

Dialing ratios may be ineffective for multiple campaigns when a wide difference exists in the number of agents that are to the queues of the campaigns.

Example

- Campaign A: queue 1 and dialing ratio = 20
- Campaign B: queue 2 and dialing ratio = 60
- 10 agents assigned to queue 1
- 1 agent assigned to queue 2

Campaign A remains busy because it has 10 agents.

Combining Campaign Priority and Ratio

You can combine campaign priority and dialing ratio to specify how the dialer should distribute calls of multiple campaigns with the same, or different, priorities.

The main goal of the outbound dialer is to generate enough traffic to keep all the agents busy without exceeding your maximum calls abandoned percentage criteria. Keeping in mind the goal of the dialer, the concept of combining ratio and priority is simply to give a campaign with the highest priority/ration the chance to be the first campaign to generate calls. This basic reasoning also assumes that all the campaigns considered have the same amount of agents logged in and ready.

When that campaign with the highest priority cannot generate sufficient traffic then the next highest campaign has the opportunity to place calls, and so on. Additionally, there are several reasons why a campaign may not generate enough calls, such as:

- A campaign is out of numbers to dial
- A campaign has no numbers to dial at the moment, but some may become available later for these reasons:

- State dialing rules
- Redial timers are assigned to numbers
- Do Not Dial timers are assigned to numbers
- Filters that are configured in the campaign profile

- A higher priority campaign does not yet have enough calling statistics compared to a lower priority campaign. This typically happens with a recently started campaign, which cannot dial aggressively due to this deficiency in statistics.
- A higher priority campaign is close to reaching the Max Abandon Call criteria, this causes the dialer to slow down resulting in lower priority campaigns placing calls.

The dialer always tries to maintain agent load before campaign priority and ratio, allowing lower priority campaigns to place calls when higher priority campaigns are unable to create sufficient traffic.

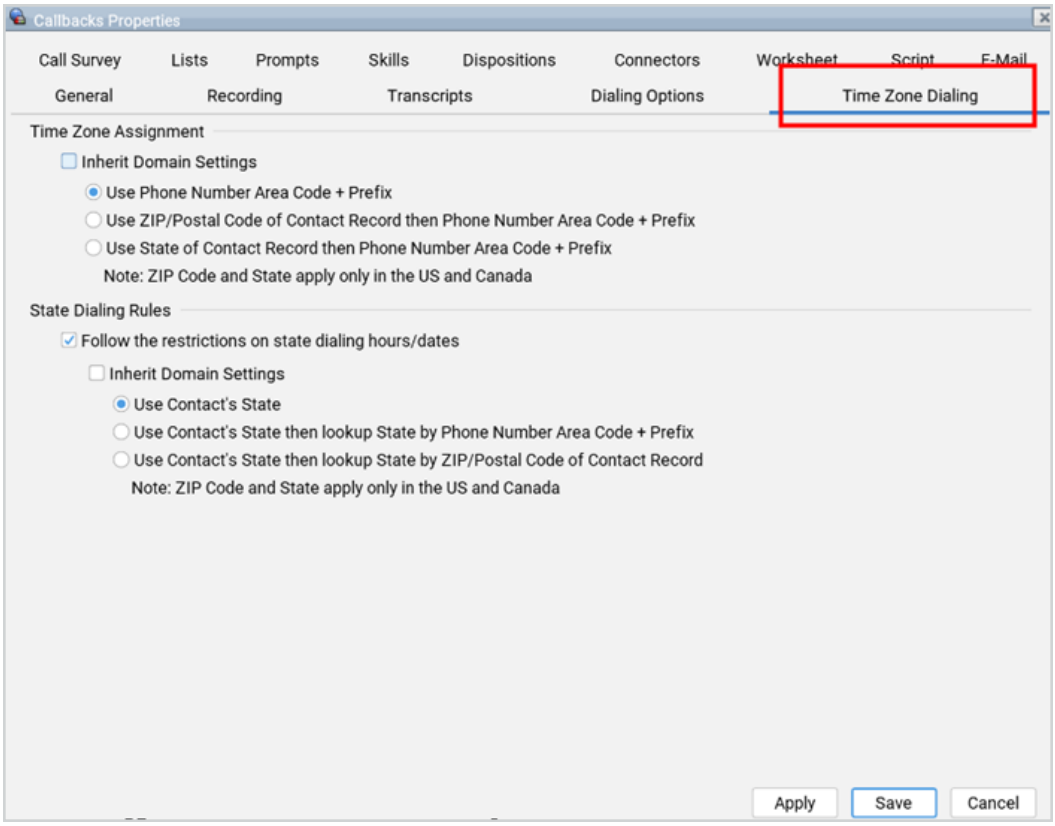
Example

You want to spend all efforts on Campaign A and Campaign B but commit the greater ratio of efforts to Campaign B until Campaign A and Campaign B are out of numbers:

Campaign	Priority	Ratio	Description
Campaign A	1	20	Campaigns A and B are dialed until all available records are dialed.
Campaign B	1	80	
Campaign C	2	20	Campaigns C and D are dialed only when campaigns with priority 1 no longer have records to dial.
Campaign D	2	80	

Configuring Time Zone Dialing Options

You can set time zone rules in your domain configuration (see Basic Configuration Administrator's Guide, *Configuring Dialing Rules*) and for each outbound campaign in the Time Zone Settings tab. Time zones automatically update between standard and daylight saving times.



Time Zone Assignment

To inherit the dialing rules defined in the VCC global configuration, select **Inherit Domain Settings**. Using campaign-specific options you can apply specific time zone settings to apply to outbound dials associated with this campaign. Be sure to consider what location data is available (for instance, the contact's state may not always be specified) and what works best for your contact center's business. The options are as follows:

- Use Phone Number Area Code + Prefix. This is the default.
- Use ZIP/Postal Code of Contact. If this is not available, use Phone Number Area Code + Prefix. Applies only to U.S. and Canada.
- Use State of Contact Record. If that is not available, use Phone Number Area Code + Prefix.

In configuring Time Zone Assignment, consider what location information is available and works best for your contact center's business.

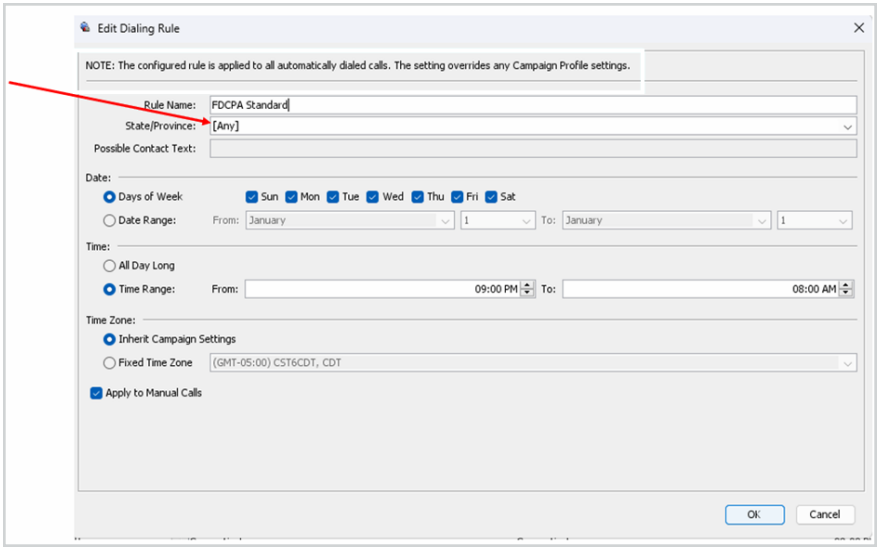
State Dialing Rules

To follow defined state dialing hours and dates, select **Follow the restrictions on state dialing hours/dates** in the lower half of this tab. To inherit the dialing rules defined in the VCC global configuration, select **Inherit Domain Settings**. By using campaign-specific options you can specify campaign-specific dialing rules:

- Use contact's state. This is the default.
- Use contact's state. If the state is not available, use contact Phone Number Area Code + Prefix to search for state.
- Use contact's state. If the state is not given, use the ZIP/Postal code of contact record to search for the state. ZIP/Postal code and state apply only to the U.S. and Canada.

Important

- Administrators can configure more than one state dialing rules with ***[Any]*** state in VCC global configuration.



The system applies the most restrictive ***[Any]***-state rule when multiple rules exist.

- Customers use ***[Any]***-state rules to define common holidays and night-time restrictions.

  Example: A rule named “Christmas” with state ***[Any]*** blocks all calls on December 25. Another rule named "No Night Time Calls" with state ***[Any]*** prevents calls during night hours. If a domain has been configured with "Christmas" and "No Night Time Calls", both using state ***[Any]***, then the system will apply the "Christmas" (more restrictive) rule to the call.

- Manual calls behave as if there is a state dialing rule configuration set to “State ONLY”, without fallback to ZIP or phone prefix.



- When manual calls placed are not associated with a campaign, the system applies as a default the domain state dialing rules configuration settings.

- It is also possible that manual calls placed are not associated with any existing contact record for the domain. When this situation occurs, then the system cannot determine the contact’s state and applies the most restrictive state dialing rule with state set to ***[Any]***.

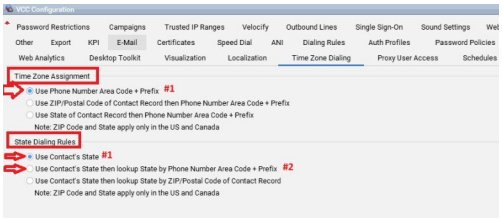
- A manual call can be associated with a contact record that has an empty **State** field. In this case, the system also applies the most restrictive state dialing rule with state set to ***[Any]***.

- State dialing rules do not apply to toll-free numbers.

- If an administrator configures **State/Province** as ***[Any]***, then domain-level state dialing rule applies and campaign-level state dialing rules are ignored, provided **Apply to Manual Calls** is selected.

  Example: Deselecting **Follow the restrictions on state dialing hours/dates** at the campaign level does not allow dialing during the times defined by the ***[Any]*** rule.

- When an administrator selects ***[Any]*** and chooses **Apply to Manual Calls**, the system also blocks outbound manual calls at the domain level.
- When an administrator selects ***[Any]*** and chooses **Inherit Campaign Settings** instead of **Fixed Time Zone**, the campaign-level Time Zone Assignment determines the contact record's time zone.
- Selecting training mode on the campaign does not bypass the enforced ***[Any]***-state rule.
- Automated dialer calls support all three state dialing rule configuration options: State, Phone Number Area Code + Prefix, and ZIP/Postal Code.
- The most popular and widely used combination for time zone dialing and state dialing rule is to rely on Phone Number Prefix for time zone and State with fallback to Phone Number Prefix for state dialing rule.

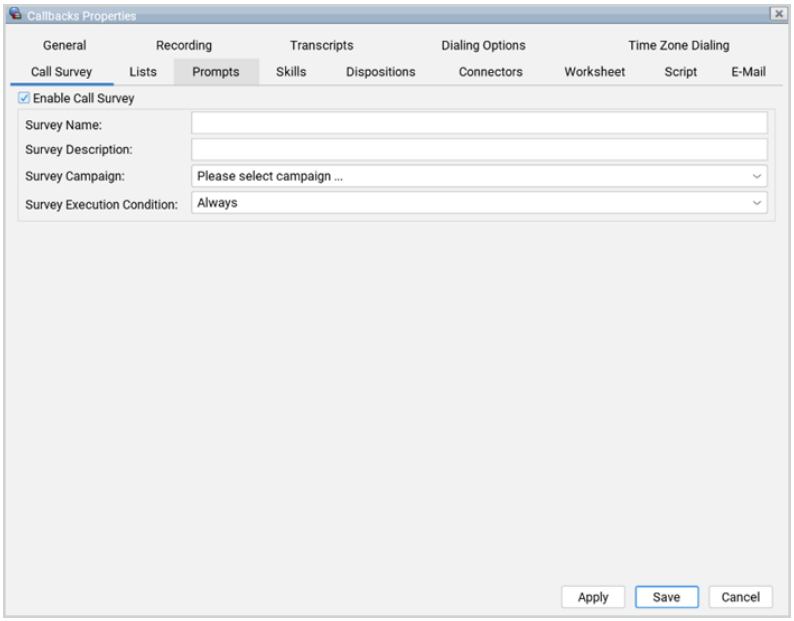


Configuring Post-Call Surveys

The feature allows post-call surveys in the IVR. Start by creating an IVR script with survey questions, using call variables where desired to track answers. At the end of the campaign the call is forwarded to another inbound campaign. When agents end calls, callers are transferred to an inbound campaign, based on Survey Execution Condition.

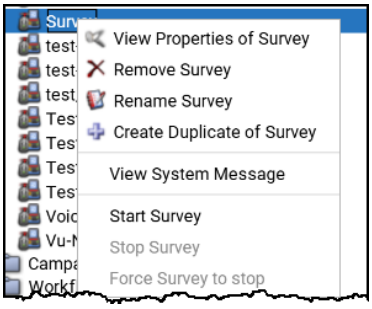
By default, the Always option is selected as the Survey Execution Condition. To transfer only calls with a specified Call Variable value, you can select a user-defined boolean variable from the drop-down menu. If the variable value is set to true, the survey is started. You can use the Post-Call Survey function with an CallSurvey.opt_in variable in the campaign's IVR script.

Reports save disposition of Call Survey campaign in the Call Survey Result field in the following data sources: ACD queue, Agent, Call Log, Call Segment, Contact, IVR. You can configure the Post-Call Survey function in **Campaign Properties > Call Survey**.



- **Enable Call Survey**: This box activates the options.
- **Survey Name**: The title of the current post-call survey.
- **Survey Description**: Any additional information about the current post-call survey.
- **Survey Campaign**: A campaign that is started once the Survey Execution Condition happens.
- **Survey Execution Condition**: When agents end calls, callers are transferred to the campaign based on Survey Execution Condition:
    - **Always** (default): Every caller is directed to the Call Survey campaign.
    - **Optional**: If you have a reporting call variable with data type boolean, it is available as one of the Survey Execution Condition options. If the variable is set to 1 (true) for the call, the call is transferred to the call survey campaign. If the variable is set to 0 (false), no post-call survey follows. The most likely use case for using this option would be to ask the caller (either in the original campaign's IVR or manually by an agent) whether or not he or she would like to participate in a call survey at the end of the call.

Click **Apply** or **Save** to save your changes, then right-click on the campaign name to ensure that the survey campaign is running.



For more information about scripts for surveys, see Interactive Voice Response (IVR) Administrator's Guide.

To report metrics gathered from post-call surveys, use reports. In a custom report, the **CALL SURVEY RESULT** contains the disposition set in your campaign.

Managing IVR Script Schedules for Autodial and Inbound Campaigns

IVR schedules associate IVR and Visual IVR scripts with one or more campaigns. These scripts are required for inbound campaigns. Scripts contain custom greetings and prompts that provide instructions to callers and route calls.

Default Schedule

When you create a campaign, it contains a default IVR schedule that is active seven days a week and 24 hours a day. By default, IVR scripts run from Sunday (day 1) to Saturday (day 7). You can add a script to the default schedule, but you cannot modify the days and time of activity, and you cannot delete it. The default schedule is used when the campaign is running unless a higher priority IVR script schedule exists. For example, you may assign to an off-hours script that is active when all other IVR schedules are inactive.

If pass-through parameters are utilized, shared schedule IVR scripts cannot be modified until the common parameter association is removed/updated.

Schedules are created in VCC Configuration > Schedules tab. For more information about shared schedules, see *Creating Schedules* in the Basic Configuration Administrator's Guide.

Creating IVR Schedule Rules

When you create an IVR schedule, you can select the days and hours of activity.

1. Click the **IVR** tab.

   To modify the default schedule, select it and click **Edit**.

2. Select your scheduling options:

   You can select different options for each schedule.

   Important

   To combine a date range with a time range, you must create a schedule for each day. Otherwise, the time range is used during each day of the date range.

   Example: To set a schedule for a date-time range, such as January 2, starting at 5 PM, to January 3, ending at 8 AM, create two schedules:

   Schedule January 2 runs from 5 PM until 11:59 PM.

   Schedule January 3 runs from 12 AM until 8 AM.

   - **Name**: Name of the schedule.
   - **IVR Script**: Script to associate with the schedule.
   - **Parameters**: If the script contains variables, you may define parameters to be interpreted at run-time using a shared, pre-configured schedule.

     Note: Parameters defined in the campaign properties override the same parameter used in shared schedule configurations only when those parameters share the same name. This enables you to specify which parameters take precedence.

- **Apply Pre-Configured Schedule**: Select this option to use a shared schedule defined in VCC Configuration > Schedules.
- **Specify Days and Times**: Days and range when the schedule is active.
  - Days of week
  - Specific date
  - Date range
  - All day long
  - Time interval
- **Channels**: See Interactive Voice Response (IVR) Administrator's Guide, *Securing Your Visual IVR Pages*.

  Select the media channels to receive interactions from this campaign. Channels options include:

  - Five9 VCC Channels:
    - Voice
    - Visual
  - Five9 SCC Channels:
    - Chat (for SCC and SFDC chats)
    - Email
    - Case (for SFDC Cases). IVR REST API supports Case media type for Five9 Engagement Workflow when you select Case check box. This option is available for Five9 domains with Five9 External Routing enabled.

3 Click **OK**.

4 In the list of schedules, move the schedule up or down to the correct priority.

In cases of overlapping times or days, schedules located higher in the list have a higher priority than those below. If no custom schedule exist for a specific time, the default schedule is used for that time.

5 Click **Save** or **Apply**.

Editing IVR Schedule Rules

You can edit custom schedules as needed, but for the default schedule you may only select the IVR script.

1. Select a schedule.
2. Click **Edit**, or double-click the schedule.
3. Make your changes.
4. Click **OK**, and **Save** or **Apply**.

Deleting IVR Schedule Rules

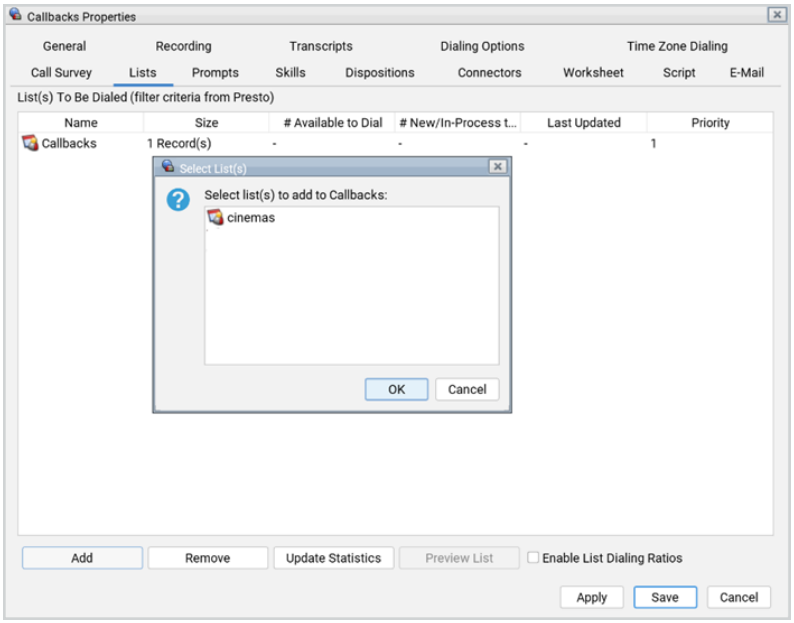
The Default schedule cannot be deleted.

1. Select one or more schedules.
2. Click **Remove**.
3. Click **OK**, and **Save** or **Apply**.

Configuring Lists for Outbound and Autodial Campaigns

In the Lists window, click **Add** to add one or multiple lists to be dialed by this campaign. The lists are dialed in the order displayed on the screen. You can set the order to your needs.

Removing Lists from Campaigns
Defining List Priority
Changing the Dialing Order of List Records in a List
Resetting the Dial Position to the Top of the List
Setting Dialing Ratios
Viewing Dialing List Statistics
Contact Records in the Dialing Process
Previewing and Exporting Dialing Lists



Campaigns keep track of the position of a call within a list, which phone numbers have been assigned a disposition, which numbers are flagged to be dialed again, and which numbers have yet to be dialed. When a campaign is started, it continues dialing from where it previously left off, unless you changed the order of the lists or reset the list position; in such cases, it starts with the new list first and continues with the second list. Numbers previously assigned a disposition are skipped. A campaign must be stopped to add a new list. See *Call Lists* in the Basic Configuration Administrator's Guide for more information about lists.

Removing Lists from Campaigns

1. In the Lists tab, click **Remove**.
2. Select one or more lists.
3. Click **OK**.
4. Click **Yes To All**.
5. Click **Apply** or **Save**.

Defining List Priority

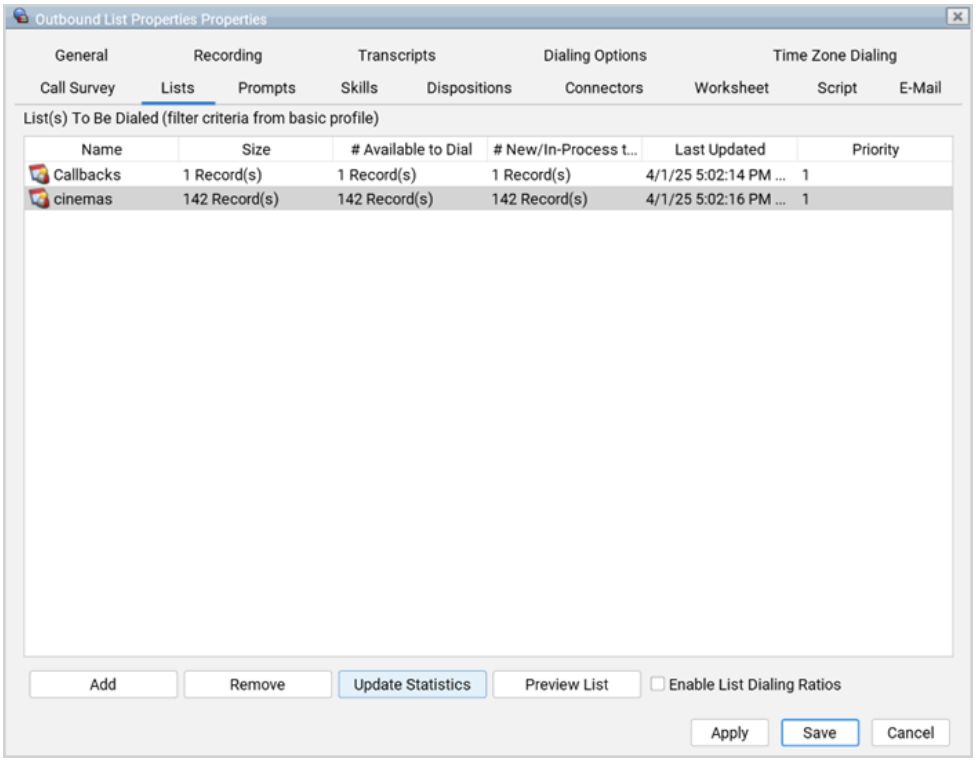
The lists are dialed according to the priorities set on the Lists tab. List priorities give you the ability to adjust the order in which calling lists are dialed in a campaign.

Lists with lower priority numbers (that is, higher priorities) are dialed before the lists with greater priority values. Setting equal priorities enables multiple lists to be considered as one sortable, virtual list, without the need to combine the lists. If you use a Campaign Profile to specify a list sort order, setting two lists to the same priority sorts contact records from both lists together as one list.

If List Dialing Ratios are enabled, the ratios apply only to lists that have the same Priority.

Setting a list priority of 0 disables the campaign's ability to dial that list. You may use a priority of 0 if you would like to leave an old list associated with a campaign for reporting purposes, but not dial it. You may also use Workflow Rules to set a list priority of 0 to temporarily disable dialing of a list, based on certain condition, such as time of day.

1 In the Lists tab, click the priority value of a list.



2 Adjust the priority of the list with the arrows on the right, or type the number.

3 Click **Apply** or **Save**.

Changing the Dialing Order of List Records in a List

The dialing order can be set on the basis of any contact fields or by several variables and functions, such as Last Disposition Date/Time. Note that contact field sorting is done on the basis of contact field data types. For example, for the string data type, 21 is considered a higher value than 111 while the number data type is sorted such values correctly. The number data type does not correctly sort negative number values to sort campaign profile.

Example

No sorting: The list is sorted by the order that it was added to the list.

Upload order	RANK	ZIP	Balance
1	SECOND	94588	1000
2	SECOND	34256	10
3	FIRST	10325	95
4	FIRST	94678	2
5	THIRD	23453	356
6	SECOND	55456	2134

Example

Sorted by first name: The dial order can be provided by sorting one or multiple contact fields, functions, or variables.

Upload order	RANK	ZIP	Balance
4	FIRST	94678	2
3	FIRST	10325	95
2	SECOND	34256	10
1	SECOND	94588	1000
6	SECOND	55456	2134
5	THIRD	23453	356

Example

Sorted by other fields, such as ZIP code.

Upload order	RANK	ZIP	Balance
3	FIRST	10325	95
5	THIRD	23453	356
2	SECOND	34256	10
6	SECOND	55456	2134
1	SECOND	94588	1000
4	FIRST	94678	2

Example

Balance is a contact field with the string data type. Using the number or currency data type for this field would result in proper sorting.

Upload order	RANK	ZIP	Balance
2	SECOND	34256	10
1	SECOND	94588	1000
4	FIRST	94678	2
6	SECOND	55456	2134
5	THIRD	23453	356
3	FIRST	10325	95

Resetting the Dial Position to the Top of the List

You can use workflow rules to reset dial position to the top of the list if certain events occur.

See *Creating Workflow Rules* in the Basic Configuration Administrator's Guide. To reset the list position manually, see *Resetting List Position*.

Setting Dialing Ratios

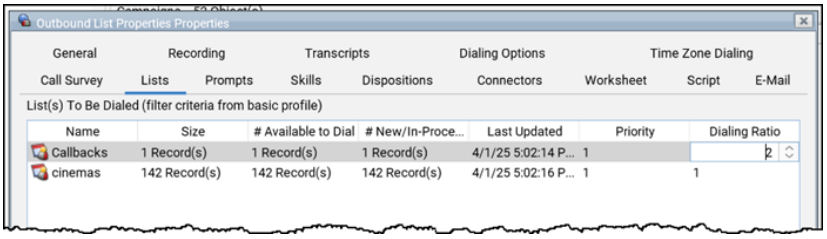
Dialing ratios provide the ability to call records from multiple lists at specified frequencies. For example, if your campaign has separate lists with hot and cold leads, you may dial hot leads more often than cold ones, without excluding any leads. Dialing Ratios apply only to lists that have the same priority.

1 Check **Enable List Dialing Ratios** at the bottom part of the window.



2 Specify the necessary ratios for each list.

Click the field, use the arrow buttons to increase or decrease the value. Alternatively, you can type in a number to the field from your keyboard. Ensure that lists that should be dialed at the specified ratios have the same Priority. Lists with higher priority levels are dialed first, at the corresponding ratios with lists that have the same priority level.

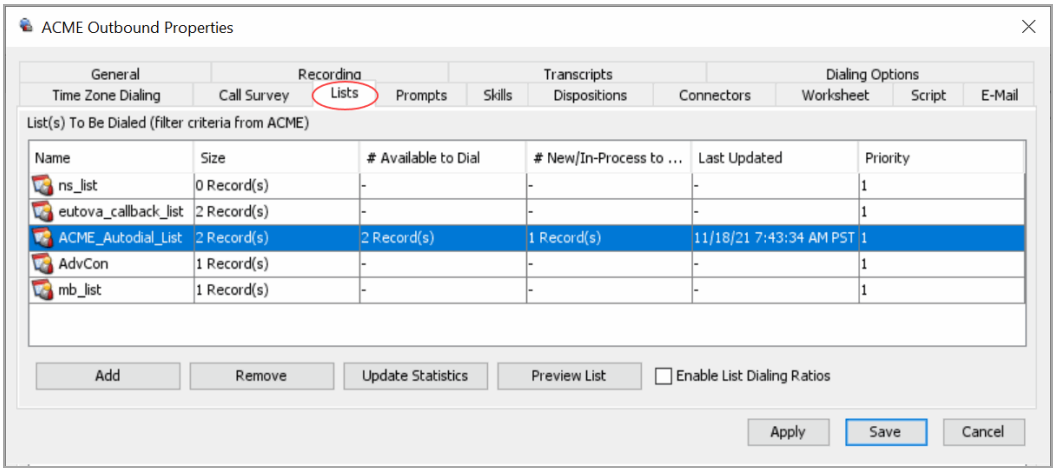


In our example, two records from the first list are dialed for every one record in the second list.

3 Click **Apply** or **Save**.

Viewing Dialing List Statistics

As an aid to planning your outbound campaigns, you can view the dialing statistics to determine the effects of campaign profile filters during configuration.



To view the dialing list statistics for your campaign, select a dialing list and click **Update Statistics**. A list-based summary is displayed. This view excludes any finalized records. These filter results can be viewed and adjusted while configuring the campaign, before applying the changes to your campaign.

List summary statistics include the following information:

- Name of the list.
- Number of records in the list.
- Number of records available to dial, based on current dialing list filter results and redial rules.
- New records and **Contact Records in the Dialing Process**.
- Date and time of the most recent statistical update to this list.
- List priority. For additional information, see **Defining List Priority**.
- Dialing ratio. For more information, see **Setting Dialing Ratios**.

To refresh the statistics once the campaign is running, select a list and click **Update Statistics**. This enables you to modify the campaign profile filters, or other list attributes and determine the effects of those changes before applying the settings to your campaign.

> **Note**
> For very large lists, the update statistics and preview list queries may take time to complete and display updated results. The date and time of the last refresh is displayed to indicate the most recent update for each list.

Contact Records in the Dialing Process

Contact records that are currently in the dialing process include:

- Contact record numbers that are in the buffer to get dialed
- New **Dial ASAP** record numbers that have been added
- Dialed records that are available for redial

Previewing and Exporting Dialing Lists

You can preview, adjust priority, and export a dialing list from your campaign in the campaign **Lists** tab.

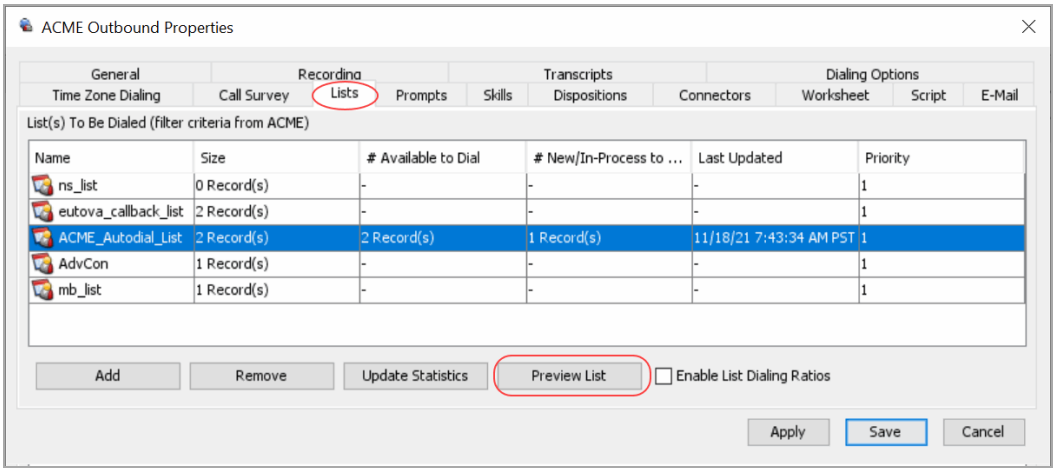
Previewing a Campaign Dialing List

To preview any dialing list associated with your campaign, select a list and click **Preview List**. The preview list shows the first 300 records that are available to dial as a result of active campaign profile filters. This includes newly added records, records coming from the Dial ASAP queue, and any new records introduced with a list update.

This list specifically excludes:

- Records in the **Final** state.
- Records for which the maximum number of allowed attempts is exhausted for every allowable number.
- Records in the do not call (DNC) list.

To refresh the statistics, select any list and click **Refresh**.



Dialing List Details

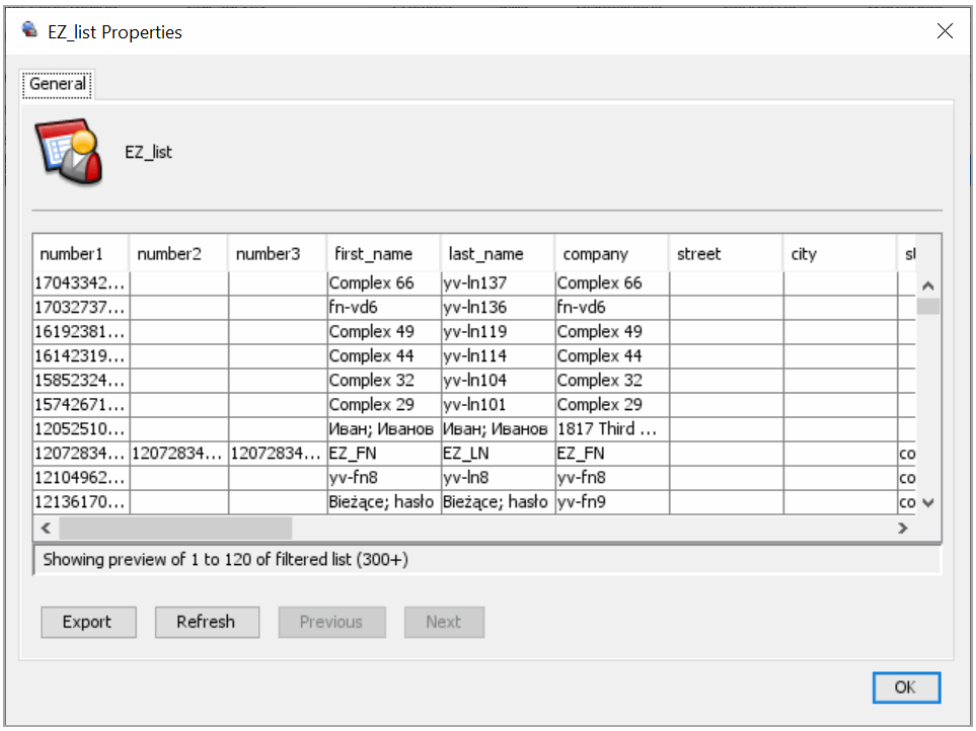
Column Name	Description
Name	Name of the list.
Size	Total number of records in the list. This changes only when records are added or removed from the list.
# Available to Dial	List size minus the number of records that are filtered out in the Campaign profile.
# New/In-progress	The numbers in this list that remain available to dial. Defined in **Previewing a Campaign Dialing List**.
Last Updated	Date and time that this list was updated by data from the server.
Priority	Priority of this list in the campaign.

Exporting a Campaign Dialing list

You can export a campaign dialing list in CSV, PDF, or TXT format.

To export a dialing list, follow these steps.

1 In the Lists tab, select a list and click **Preview List**.



> **Note**
>
> The **Previous** and **Next** buttons are not functional.

2 In the list properties view, click **Export**.

3 In the list export view, select a storage location, file type, and provide a file name.

4 Select and arrange the columns that you want to export.

> **Note**
>
> PDF exports are limited to five columns.

5 Click **Save**.

Configuring Skills for Campaigns

Skills apply to all types of campaigns.

Skill Groups for Outbound Campaigns
Outbound Skills for Inbound and Autodial Campaigns
Assigning Skill Groups to Campaigns
Removing Skill Groups from Campaigns

Important

If no skills are added to a campaign the interactions are assigned to any available agent.

Skill Groups for Outbound Campaigns

If an outbound campaign is configured with no outbound skill, it is configured as an outbound campaign for the default skill. When this campaign is running, this outbound campaign initiates calls for each available agent, resulting in numerous outbound calls, constrained only by the lines allocated to the campaign.

Select the **Skills** tab to add to add one or more skill groups to the campaign. The skill groups added here determines which agents receives calls from this campaign.

If multiple skill groups are loaded for the campaign, the agents in the skill group listed first receives the first calls. If they are on a call, the dialer sends calls to the agents in the next skill group. Move skill groups up or down in priority by using the **Up** and **Down** buttons.

For routing calls to available agents, the order of the skill groups in this tab takes the highest priority, followed by skill levels that are configured per agent in User Properties, and then followed by the Distribution Algorithm configured in the General tab of Campaign Properties.

To add skill groups, see Basic Configuration Administrator's Guide , *Adding Skill Groups*.

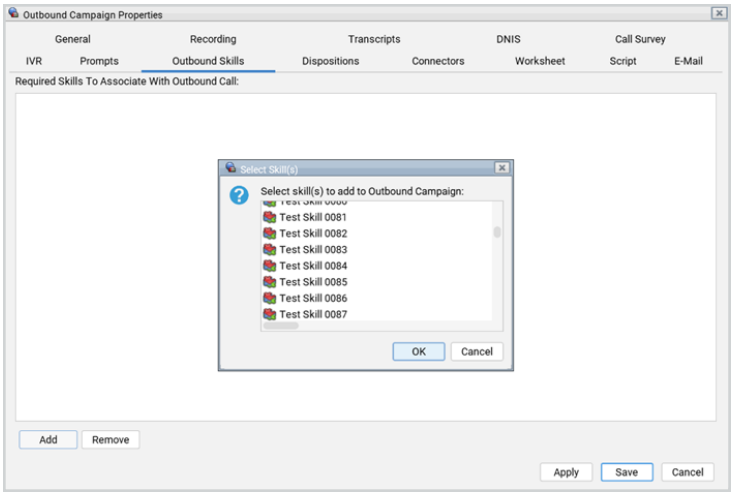
Outbound Skills for Inbound and Autodial Campaigns

When making a manual call (any call initiated by the agent), the Five9 agent is prompted to associate the call with a campaign. Doing so assigns all of the campaign properties to that call, including the script, worksheet, and dispositions.

If you would like to make this Inbound Campaign available in the list of campaigns that can be associated with manual calls, add a skill group in the Outbound Skills tab. Any agent who is a member of the selected skill group(s) can associate manual calls with this campaign.

Assigning Skill Groups to Campaigns

1 In the Skills or Outbound Skills tab, click **Add**.



2 Select one or more skill groups.

3 Click **OK**.

4 Move skill groups up or down in priority by using the Up or Down buttons.

5 Click **Apply** or **Save**.

Removing Skill Groups from Campaigns

1 Select one or several items to remove.

2 Click **Remove**.

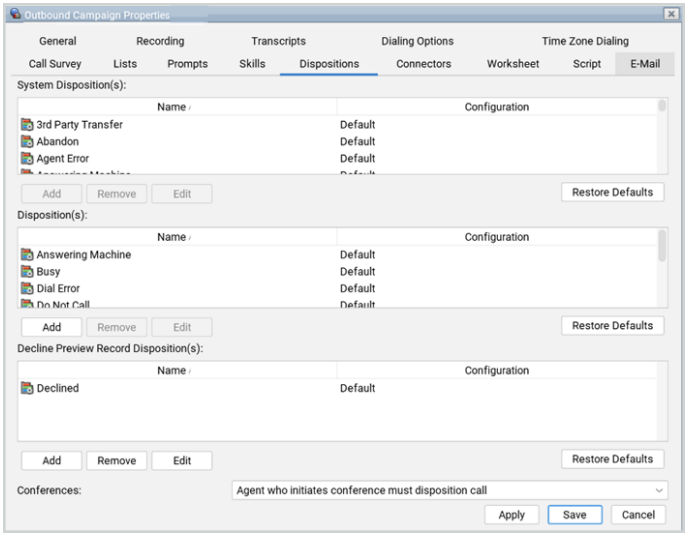
3 Confirm the skill group removal by clicking **Yes To All**.

4 Click **Apply** or **Save**.

Configuring Dispositions

This tab is used to add and view the dispositions you that may be set for calls associated to outbound, inbound, and autodial campaigns. The dispositions listed in the Call Dispositions table of this tab are available to agents when processing calls.

Disposition Categories
Assigning Dispositions to Campaigns
Removing Dispositions from Campaigns
Editing Dispositions for Each Campaign
Managing Campaign Dispositions



To configure dispositions see Basic Configuration Administrator's Guide, *Configuring Custom Dispositions*.

> **Note**
>
> You can also assign, and group, dispositions in campaign profiles. If a disposition is in a group in a campaign profile, and you assign the same disposition to a campaign that associated with that profile, the disposition still appears in the list of available dispositions in the agent application. However, it appears at the top of the list rather than in the group. Five9 recommends that you assign a given disposition either in the campaign profile or in a campaign, but not both.

Disposition Categories

- **System Call Disposition(s)**: The system dispositions are displayed in the System Call Disposition(s) area. You may edit the Properties of these dispositions to change the dialing behavior for this campaign. For example, one campaign may have a redial timer of 5 minutes for the Busy system disposition, while another campaign may use a 10 minute timer, depending on its requirements.

- **Call Disposition(s)**: These dispositions may be set by agents at the end of calls to determine its outcome.

  For outbound campaigns, you may need to create different dispositions for inbound calls if you do not want cross-campaign disposition types (such as, Final type with Apply to Campaigns Using This Disposition selected) to affect the same records in your outbound campaigns.

- **Decline Preview Record Disposition(s)**: Applies to only to outbound campaigns. Depending on your configuration, agents may have the option to decline records, without calling a number, when working on Preview Campaigns. For this case, you should define the Decline dispositions.

The following tasks can be performed for each list:

- **Add**: Opens the Select Disposition(s) window where you can choose one or several existing dispositions to add.

- **Remove**: Removes the selected dispositions from the list.

- **Edit**: Opens the Disposition properties window where you can change the disposition settings. If you change default settings, the Configuration field in the dispositions table changes from Standard to Custom.

- **Restore Defaults**: Reverts any changes made to dispositions for this campaign to their global (default) configurations.

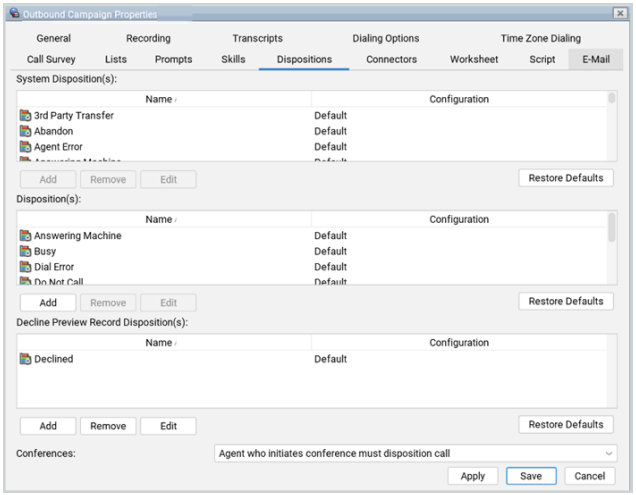
On the Dispositions tab, you can select one of these options for Conference calls:

- **Agent who initiates conference must disposition call**: Requires that the first agent in a conference that contains at least one other agent to set a disposition when leaving the conference.
- **Last Agent to leave conference must disposition call**: Requires that the last agent who is left in a conference that contained at least one other agent to set a disposition when leaving the conference.
- **Conference initiator decides who must disposition call**: Provides the ability for the first agent in a conference that contains at least one other agent to either set a disposition when leaving the conference, or to pass on the disposition-setting responsibility to another agent who is on the call.

Assigning Dispositions to Campaigns

Depending on your configuration, agents may have the option to decline records when working with preview campaigns. For this case, you should define the Decline Preview Record dispositions.

1. In the Dispositions tab, for each section, click **Add**.



   For the Preview Campaign Dialing Mode, the Decline Preview Record Dispositions area include the Declined system disposition. If you want to use only custom Declined dispositions, you may remove.

2. Select one or more dispositions, and click **OK**.

3 Repeat the steps for the other sections.

4 Click **Apply** or **Save**.

Removing Dispositions from Campaigns

You cannot remove system dispositions.

1 In a section, select one or more dispositions.

2 Click **Remove**.

3 Click **Yes To All**.

4 Repeat the steps for the other section.

5 Click **Apply** or **Save**.

Editing Dispositions for Each Campaign

You can use the Edit button to open a Disposition Properties for Campaign window for any system disposition or custom dispositions that are added to a campaign.

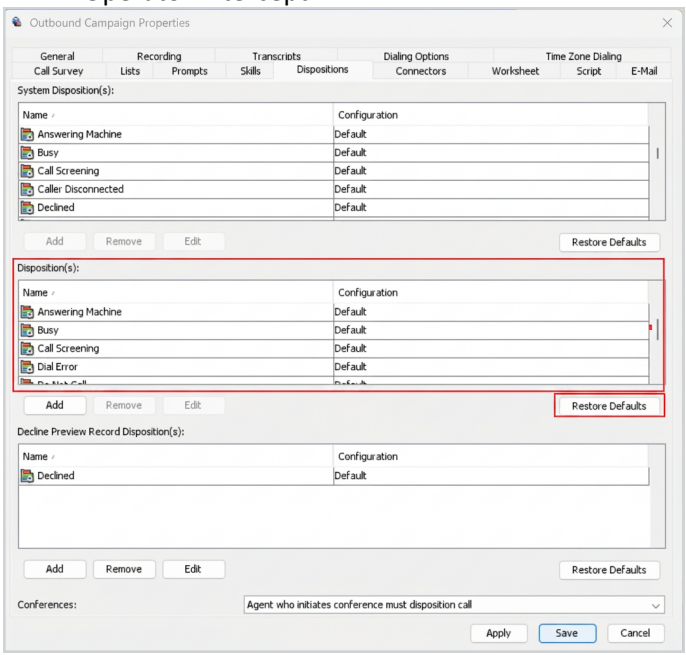
For example, you may wish to change the Redial timer for the Busy disposition to be 5 minutes for one campaign, and 10 minutes for another campaign.

Any changes made to dispositions in this manner do not apply to other campaigns in which the Disposition is used, or to the global disposition settings. If any changes are made to dispositions for a campaign, the Configuration column in the Dispositions tab display Custom, instead of Default.

For outbound campaigns that are in Preview Dialing Mode, you can use the Restore Defaults button in the Dispositions tab to undo the custom disposition configurations for the campaign and restore the System, Call, or Decline dispositions to their default, global configurations. The system lists the following default dispositions:

- Answering Machine
- Busy
- Call Screening

- Dial Error
- Do Not Call
- Fax
- No Answer
- No Disposition
- Operator Intercept



On the Dispositions tab, you can also define which party (conference initiating Agent or last Agent) must define the Disposition after the Conference call.

You can also allow the conference initiator to decide who must disposition the call. In this case, the initial agent may either set a disposition when leaving the conference, or instead select another agent in the conference who becomes responsible for setting a disposition or passing the ability to another agent.

Managing Campaign Dispositions

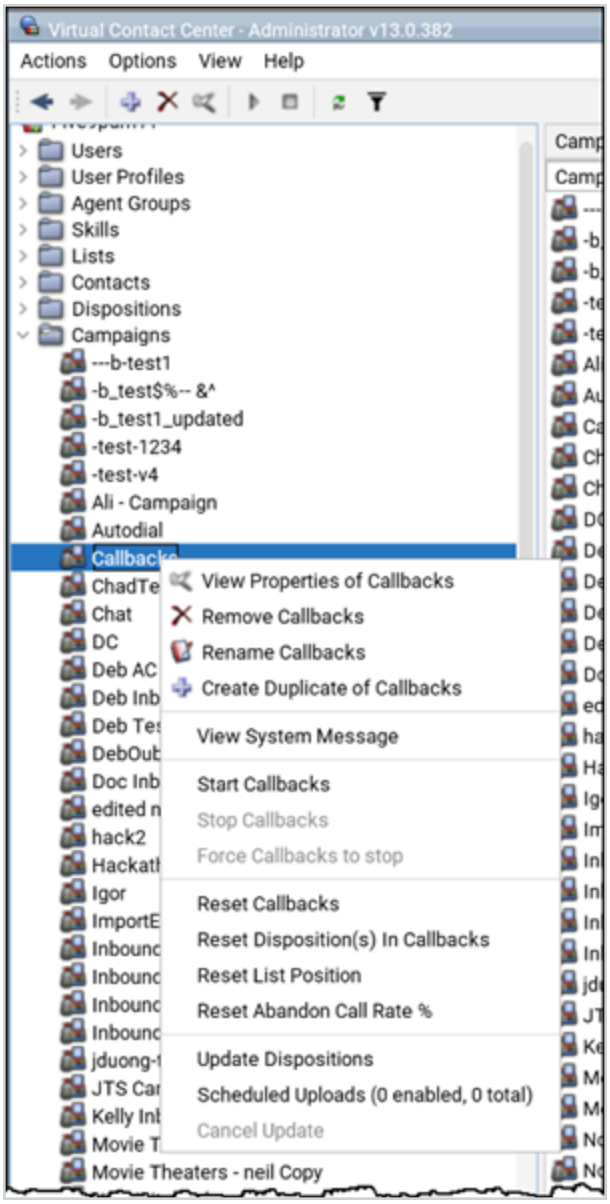
Scheduling or canceling a campaign dispositions update is similar to the same operation with call lists.

See Basic Configuration Administrator's Guide, *Importing and Updating Call Lists*.

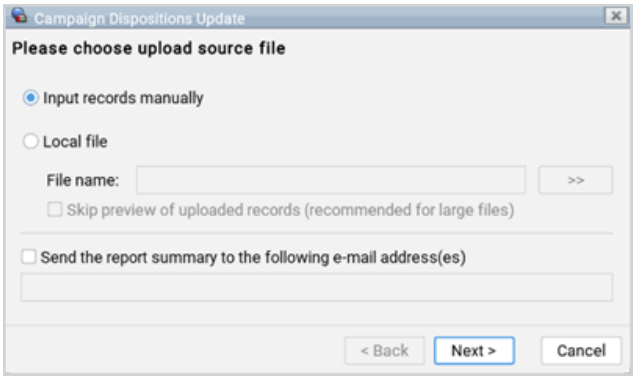
Updating Campaign Dispositions

You can update dispositions in a batch mode.

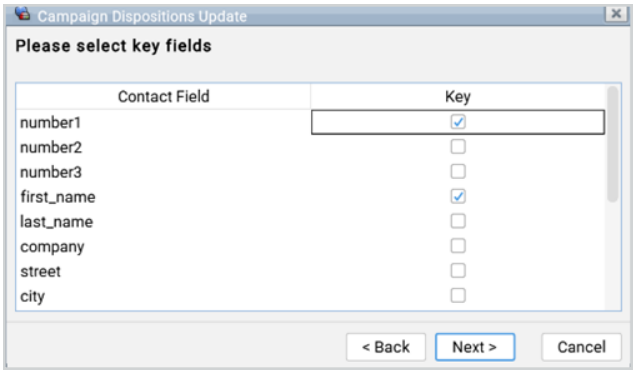
1. Click **Campaigns**.
2. Right-click a campaign name, and select **Update Dispositions**.



3 Choose a source for the dispositions upload and click **Next.**

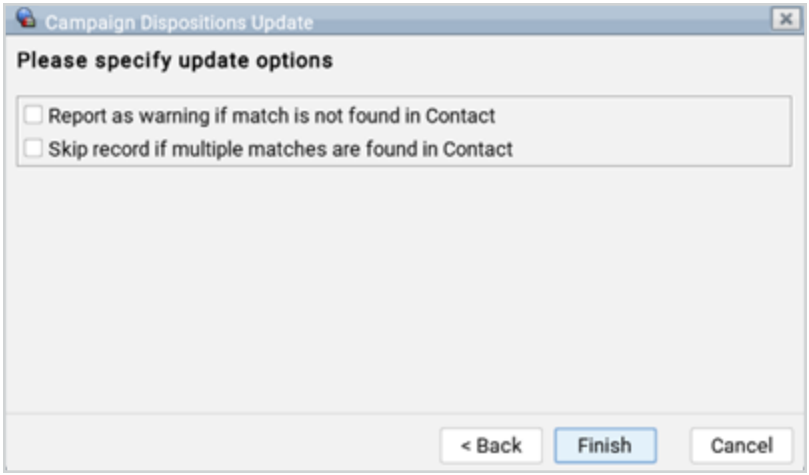


4 To input records manually, select the Key fields to be used for identifying unique contact records, and click **Next**.



See also, [Configuring Lists for Outbound and Autodial Campaigns](#).

5 Check an update option.



6 Click **Finish**.

Resetting Dispositions in Outbound Campaigns

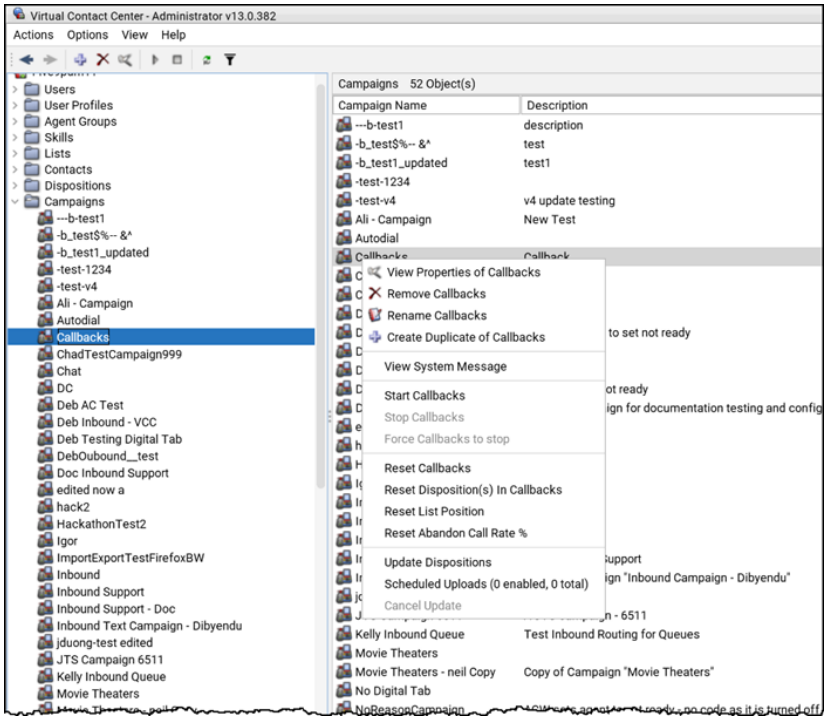
Reset only the dispositions you know are safe to redial. Resetting dispositions for a campaign applies only to the lists currently loaded in the campaign.

After processing an outbound campaign for a period of time, you may want to redial some numbers that have previously stopped being dialed, due to their assigned dispositions. Use the Reset Disposition option to instruct the campaign to redial numbers based on the dispositions you select. For example, if you have a disposition called Contact Not Available, you may want to retry these contacts after a week.

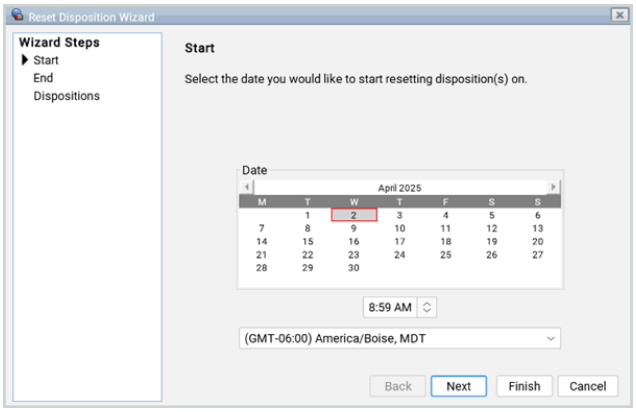
You can also reset calls that were assigned a disposition by the system. Many system dispositions are redialed five times (if using the default redial count). You can use Reset Disposition to try these numbers again and start the redial count over.

1 Click **Campaigns**.

2 Right-click a campaign name, and select **Reset Disposition(s) in <name_of_campaign>**.

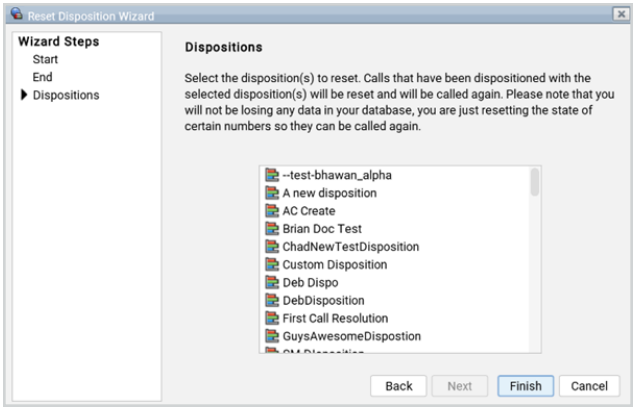


3 Choose the starting date and time and click **Next**.



4 Choose the ending date and time and click **Next**.

5 Select the dispositions you want to reset, and click **Finish**.



6 Click **OK**.

Adding Connectors

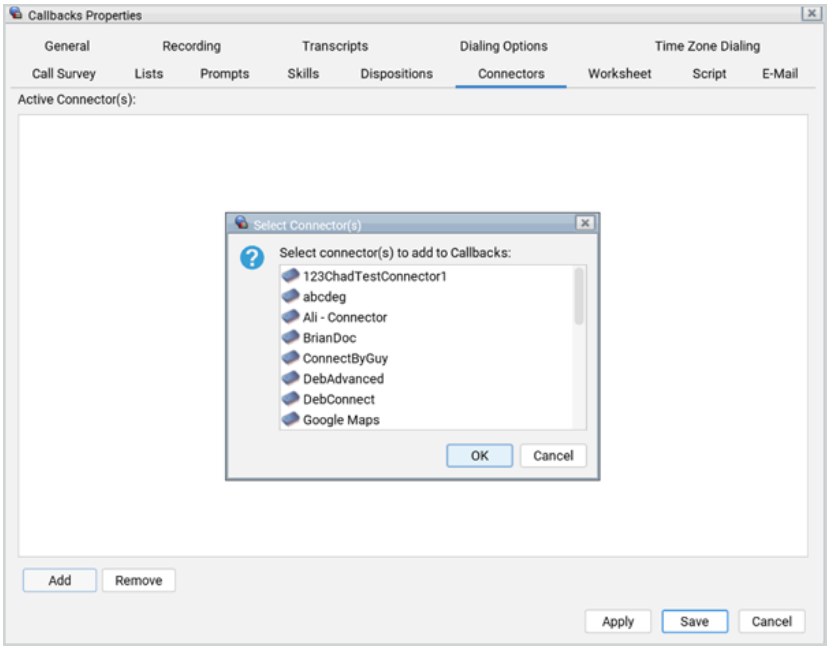
To add a connector to a campaign, click the Connectors tab. Connectors apply to all outbound, inbound, and autodial campaigns. Connectors may be used to pass information about a call or contact record to an external Web server. Connectors are executed according to trigger configured in Connector Properties. For example, they may be used when calls are accepted or when calls are disconnected.

For more information about connectors, see Connectors in the Basic Configuration.

Assigning Connectors to Campaigns
Removing Connectors from Campaigns

Assigning Connectors to Campaigns

1 In the Connectors tab, click **Add**.



2 Select one or more connectors.

3 Click **OK**.

4 Click **Apply** or **Save**.

Removing Connectors from Campaigns

1 In the Connectors tab, select the connectors to remove.

2 Click **Remove**.

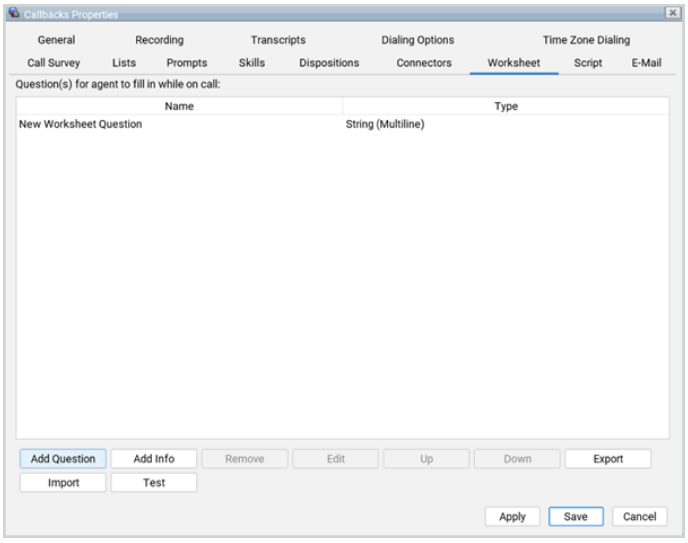
3 Click **Yes To All**.

4 Click **Apply** or **Save**.

Configuring Worksheets in VCC Admin

Use a worksheet to create a form in question-and-answer format, to be filled out by an agent while on a call. The worksheet is used to gather information from the contact, without saving this data to a contact field. Data entered in a worksheet is stored in the database and can be accessed through the various Worksheet Reports on the online Reports portal. Worksheet questions may be assigned to any Campaign types.

Adding Worksheet Questions in VCC Admin
Exporting Worksheets in VCC Admin
Importing Worksheets in VCC Admin
Removing Worksheet Questions in VCC Admin
Using Contact Record Field Values in Worksheets



You create the worksheet by adding questions, one at a time. The questions appear to the agent in the order displayed in the worksheet, after an agent presses on the Start Worksheet button. You can change the question order with the Up and Down buttons. You can click **Export** to export the worksheet for use in other campaigns. By clicking **Import** you can import the saved worksheet to use it in the current campaign. By clicking Test you can test the created worksheet. You can view the worksheet in the way the agent views it. Here you can also go through all the questions listed in the worksheet.

Email notifications for dispositions can include worksheet information (see **Configuring Email Notifications**). To access the worksheet information in reporting, use the Worksheet Data Source.

In addition to the information below, you can add HTML to worksheet fields.

Adding Worksheet Questions in VCC Admin

1. In the Worksheet tab, click **Add Question**.

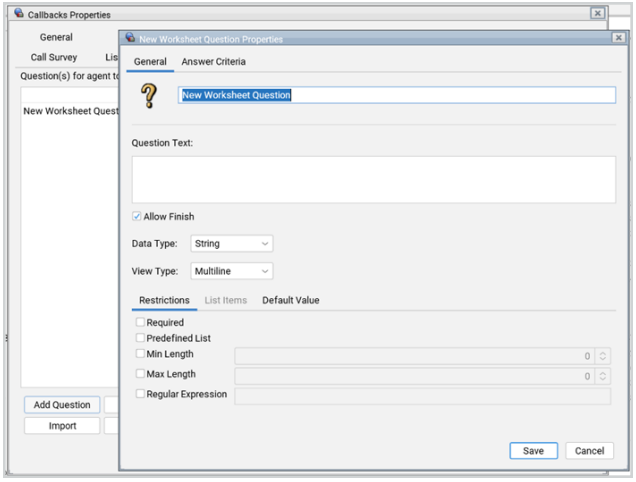
   You can click Add Info to add a Worksheet page that gives instructions to agents without asking for input.

2. In the text box, enter a name for this question.

   The name of the question is not the actual question. For example, if the question is *What is your current interest rate?*, the name of the question may be *Interest Rate*. The name that you enter creates the field name displayed in reports.

3. Type the question in the question field.

   The question text does not have to be a question for the contact. It may be instructions for the agent, such as *Enter the contact's interest rate*.



4. Define the following options:

   Configuring a question is similar to configuring call variables and contact fields.

   - Allow Finish: If not selected, the agent cannot click the Finish button for that question. Use this option to ensure that agents cannot prematurely

close the Worksheet without answering all required questions.

- Data Type: Define the format of the answers. The Date/Time format enables agents to pick a date and time from the calendar, for example when setting appointments.
- View Type: Define the format of the answers. Options are different if the Predefined List option is selected and a List Item is added. See Basic Configuration Administrator's Guide, *Data Types*.

5 Define options in the Restrictions tab.

- Required: You cannot finish the worksheet without answering all questions.
- Predefined List: Not Available for Date, Time, Date/Time, Boolean, and Duration data types. If you select this option, the agent does not need to enter the answer but has to select one or several answers that you define. You can define the possible answers the List Items tab. For each data type, the View Types to be selected are as follows:
  - Combo Box: Create possible answers that are displayed to the agent in a drop-down menu. Good for yes/no questions or when you know all possible answers. You must define the list of possible answers. This option enables agents to select values.
  - List: This option shows all values in the area.
  - Buttons: The check boxes appear in front of each value.
  - Text Field: Gives the agent a text box to enter the answer.
  - Check Box: Allows the agent to mark the answer. The check box question type allows multiple selections using check boxes.
  - Date: Allows the agent to pick a date from the calendar and also choose the time. Good for setting appointments.
  - Text Area: A large text field for entering the answer. Use this if the answer needs multiple lines of text.
  - Info: The agent does not enter the answer. It displays information to the agent such as *Don't forget to confirm the contact's first and last name*.
- Min Length/Min Value: Limits the values to be entered by agents. Not available for predefined list. Not available for Phone and Boolean data types.

- Max Length/Max Value: Limits the values to be entered by agents. Not available for predefined list. Not available for Phone and Boolean data types.
- Regular Expression: Not available for predefined lists and Date, Time, Date/Time, Boolean, and Duration data types. Regular expressions are an option to use for input validation to ensure consistent data entry. For instance, a regular expression could be used to validate that a record locator in a travel reservation conformed to a specific pattern or combination of alphanumeric symbols (for example, ABC123). Patterns are defined using POSIX, Perl, or ASCII regex syntaxes. For example, using the ASCII syntax, a pattern with three upper-case letters, followed by three digits, can be configured as follows:

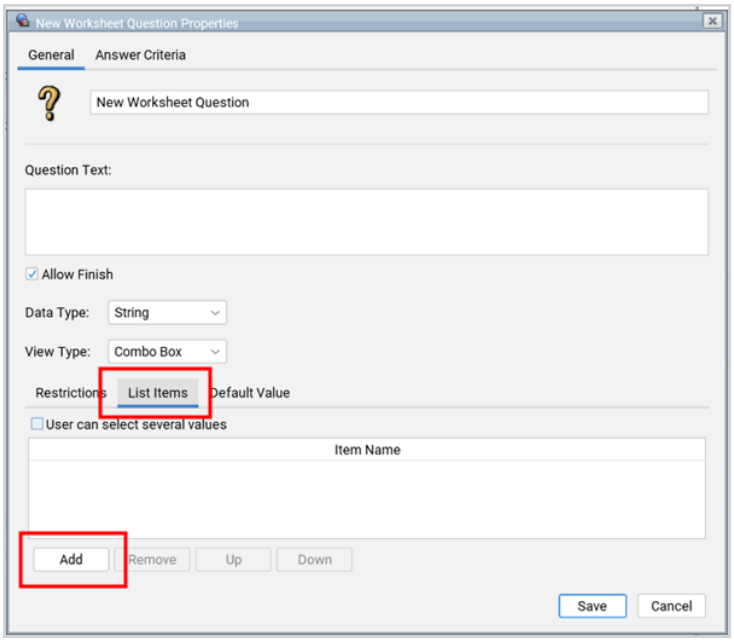
  [A-Z][A-Z][A-Z][0-9][0-9][0-9]

If the Predefined List option is activated, the List Items tab is available.

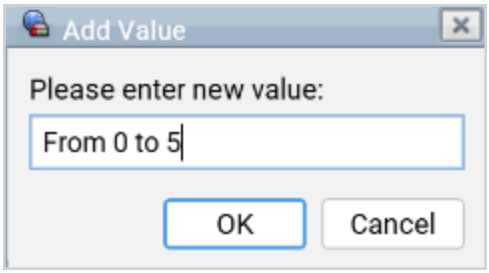
6 Define options in the **List Items** tab.

You create the possible answers that are displayed to the agent in a menu. Good for yes/no questions or when you know all possible answers.

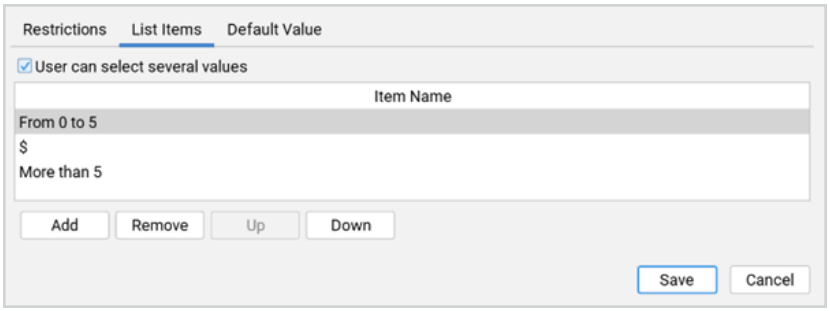
7 Click **Add** to create an answer.



8 In the **Add Value** field, enter a value, and click **OK**.



9 Configure possible answers and answer criteria.



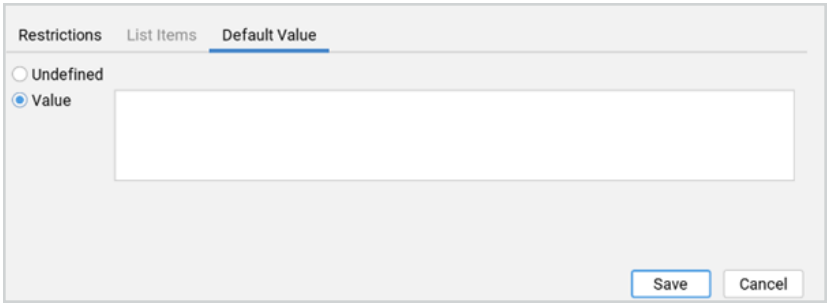
10 Optionally, check **User can select several values**.

11 Use **Up** and **Down** buttons to arrange the answers.

12 Optionally, in the **Default Value** tab, add the default value.

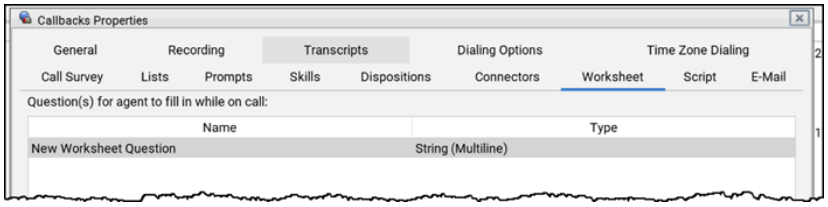
If you use a predefined list, the **Default Value** tab displays all predefined values.

You can select one in the list. If you do not use the **Predefined List**, the **Default Value** tab enables you to select the **Undefined** option or define a value depending on data type.



13 Click **Save**.

The question appears in the Worksheet tab.

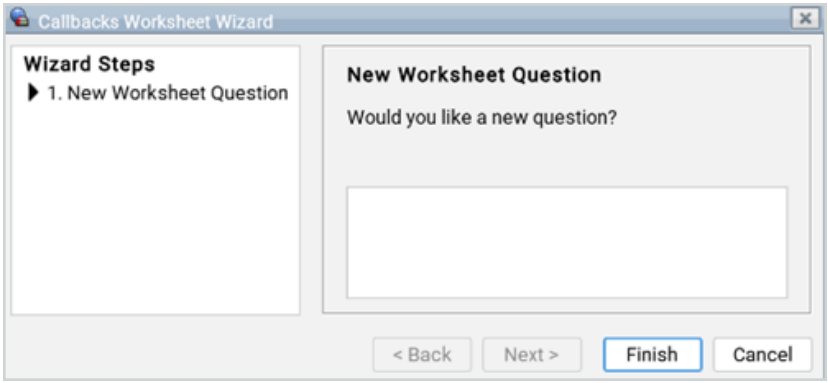


14 When you have several questions, change the order as needed with the Up and Down buttons.

If you use the Predefined List question, arrange the possible answers in the List Items tab while creating the question.

15 To view the worksheet, click **Test**.

You can click Wizard Steps to preview each question or click Next.



16 Click **Apply** or **Save**.

Exporting Worksheets in VCC Admin

You can export the worksheet to use it in another campaign.

1 Click **Export**, and save the file to your computer.

2 Click **OK**.

Importing Worksheets in VCC Admin

You can import a previously exported worksheet.

1. Click **Import**.
2. Locate the worksheet file on your computer, and click **Open**.

   The questions appear in the Worksheet tab.
3. Click **Apply** or **Save**.

Removing Worksheet Questions in VCC Admin

1. Select one or more items in the list.
2. Click **Remove**.
3. Click **Yes**.
4. Click **Apply** or **Save**.

Using Contact Record Field Values in Worksheets

You to add contact field values in worksheet questions. Worksheets support specifically formatted text, called replacement parameters, which are replaced by contact data at runtime. To replace text in the question text area of a worksheet, add a replacement parameter tag that pulls contact data for the connected call. Any contact field may be used in this format: `@Customer.<field_name>@`

For example, if you want the text to read: *Dear Mr./Mrs. Johnson*, add this to your call script: `Dear Mr./Mrs. @Customer.last_name@`

When the worksheet is loaded with the contact record for the call, the text `@Customer.last_name@` is replaced with the data in the `last_name` field of the contact record.

Instead of creating a worksheet question that reads *Hello Mr / Mrs LAST NAME*, the system adds the name of the customer who is on the phone, making worksheets more dynamic. All variable names are case sensitive.

To determine which variables are available in your domain, go to **Contacts > Fields**. Below are the Five9 default (system) contact fields: `number1`, `number2`, `number3`, `first_name`, `last_name`, `company`, `street`, `city`, `state`, and `zip`. Any contact field, including your custom fields, can be put into a worksheet. You only need to determine the exact field (variable) name, such as `@Customer.last_name@`

You can also use `@Worksheet.questionname@` for previous worksheet values, where `questionname` is the name of a previous question. If you are using a test worksheet in Campaign Properties, the replacement parameters are not populated because it is not associated with a specific record. You cannot use a replacement parameter in the first question of the worksheet.

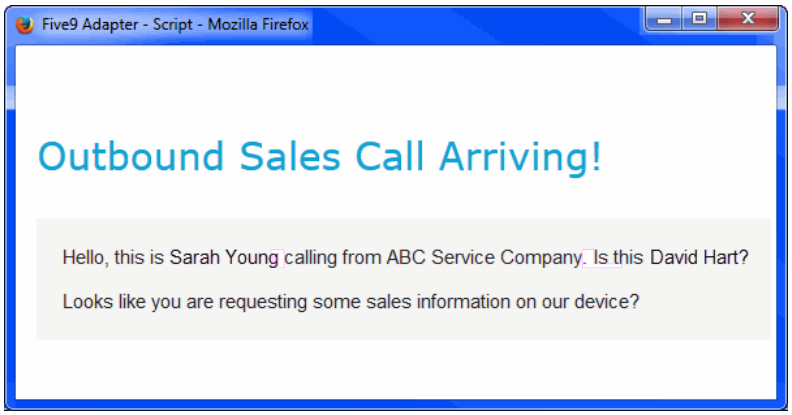
Configuring Scripts

The script is the first screen displayed to the agent when a call is presented. The script is the sales pitch the agent reads when a call is connected or notes to help the agent while on a call. In this tab, you can write or edit the script, in HTML, or import/export HTML files. This section describes outbound, inbound, and autodial campaign scripts.

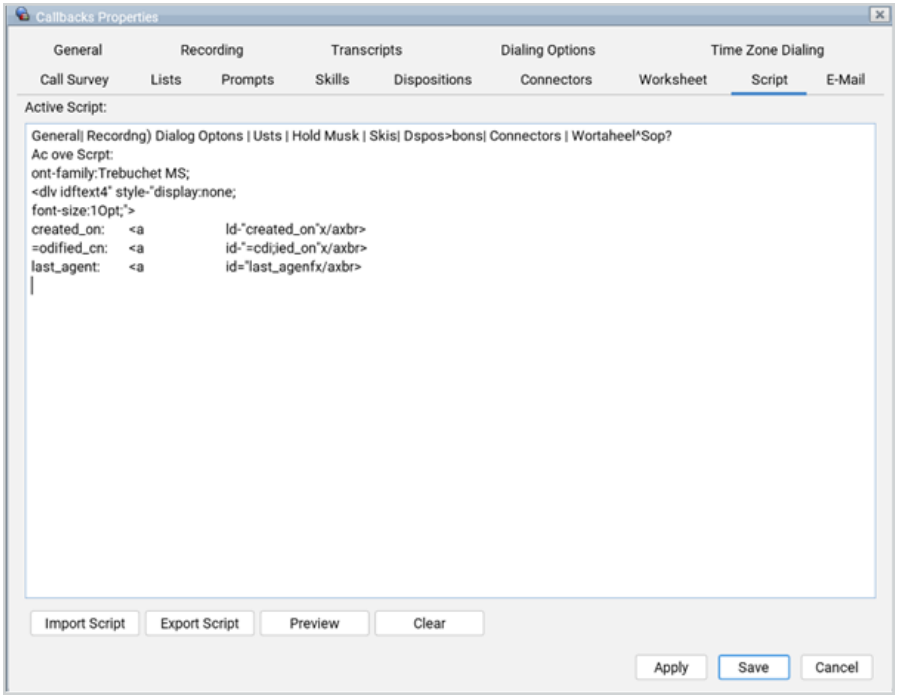
Creating Scripts
Importing Scripts
Exporting Scripts
Using Contact Data in Scripts

Agent scripts can handle JavaScript code and have advanced HTML handling capabilities. This feature allows for more advanced and dynamic scripts to be created, potentially improving agent productivity and efficiency by defining a clear workflow for talking with clients and handling various situations.

This example shows a Web page that contains the script text that agents must read. Script text can include menus and fields in which the agent can enter the customer's information.



Aside from popup information, another example where JavaScript may be used is to show and hide script question text to save space on the page. Such a setup allows agents to click on a button or link to expand questions as needed.



Creating Scripts

To add a script to the campaign, you need to import an HTML file or type HTML code into the text box in the Script tab.

1. Open a text editor.
2. Type your script.
3. To view the script, click **Preview**.
4. Save the file as HTML. Web page, or Web Page Filtered.

Importing Scripts

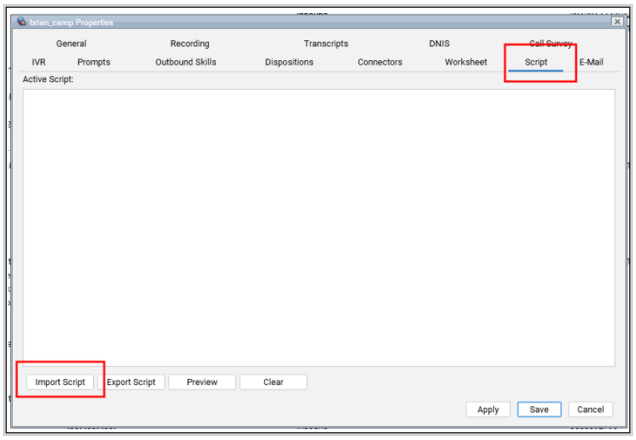
Importing scripts allows importing files for call scripts. (Supports only HTM or HTML format).

Importing scripts may have dependencies on variables. If an import fails, fix the underlying issue, then reimport.

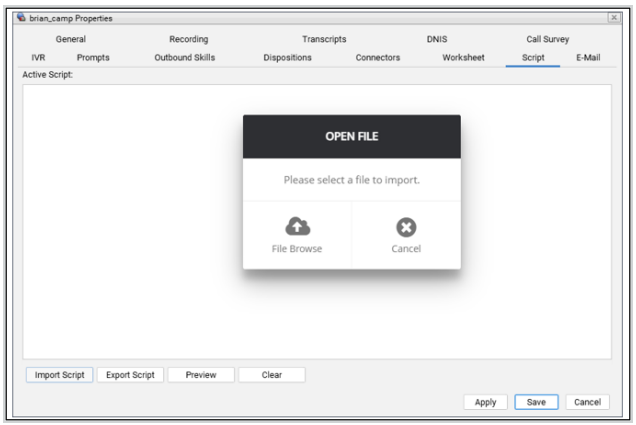
To import a script, follow these steps.

1 Under **Campaigns**, double-click on a campaign.

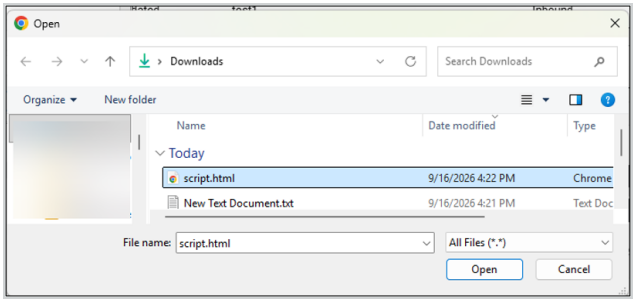
2 Select **Script**, and select **Import Script**.



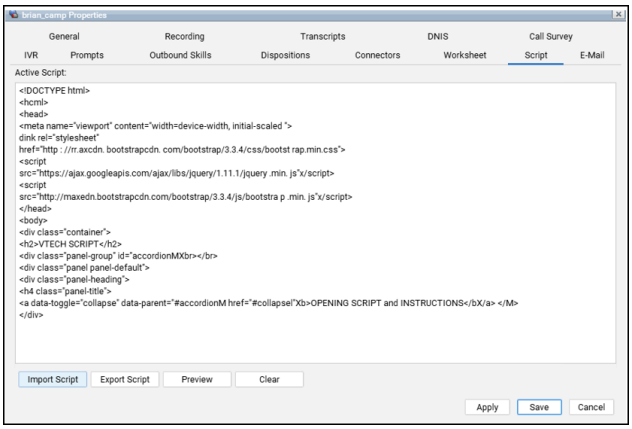
3 To select a file to import, select **File Browse**.



4 Select the HTML file to upload.



The HTML content is added



5 Select **Save**. The script is added.

If you encounter an issue where some part of the script is not showing up, check for the following:

- A special character where the script cuts off and uses the standard HTML ASCII Code.
- Call variables are case-sensitive. Ensure that variable names match those in the VCC Administrator application.
- Five9 only supports {{'@Customer.' + key + '@';}} class CAVs (Call Activity Variables) in scripts. {{'@Call.'}} is not supported.

Exporting Scripts

To use a script in other campaigns, follow these steps.

1. Click **Export Script**.
2. Locate the file on your computer, and click **Open**.

Using Contact Data in Scripts

Below you can find the steps for using contact data fields to personalize scripts. Instead of writing a script that says hello FIRST NAME, the script adds the name of the contact, for example: Mr. Thomas, thank you for taking my call. Do you have a few minutes?

To use contact fields in a script, you must save the script as HTML and edit the HTML code. You can edit the code in a text editor or an HTML editor before importing it into the campaign, or you can edit the code after importing.

1. For a list of fields available to use in your script, click **Contacts > Fields**.

   The default contact fields, number1, number2, number3, first_name, last_name, company, street, city, state, and zip, and any custom contact fields are available.

2. Be sure that the field names to be used are populated in the contact database from one or more lists.

3. Save your script as an HTML file or as a Web page or Web Page Filtered.

4. Edit the HTML file in a text or HTML editor.

   Add text in the code for the contact fields you want to insert in the script. Field names are replaced with the contact data from the contact record. Any contact field may be used in this format: `@Customer.<field_name>@`

   For example, if you want the text to read: *Dear Mr./Mrs. Johnson*, add this to your call script: `Dear Mr./Mrs. @Customer.last_name@`

   When the worksheet is loaded with the contact record for the call, the text `@Customer.last_name@` is replaced with the data in the `last_name` field of the contact record.

   Instead of creating a worksheet question that reads *Hello Mr / Mrs LAST NAME*, the system adds the name of the customer who is on the phone, making worksheets more dynamic. All variable names are case sensitive.

5. Save the HTML file.

6 Add the script to the campaign.

7 To view the script, click **Preview**.

This view does not have the contact data populated in the script because there is no active contact record. Use the Agent application to fully test the script.

An alternative to use the `@Customer.<field_name>@` for automatically replaced contact field values is using custom HTML tags. Below are the HTML tags for the default contact fields. Note that the uppercase text can be different from what is shown here. This text is shown when the script is being tested.

```
<a id=number>PHONE NUMBER</a>
<a id=first_name>FIRST NAME</a>
<a id=last_name>LAST NAME</a>
<a id=company>COMPANY NAME</a>
<a id=street>ADDRESS</a>
<a id=city>CITY</a>
<a id=state>STATE</a>
<a id=zip>ZIP CODE</a>
```

Example

HTML tag for a custom field called `rate`:

```
<a id=rate>INTEREST RATE</a>
```

Below is a section of HTML code with tags for adding contact data and an example of the resulting text.

```
<p class="style2">Hello. I am calling about your mortgage with <a
id=lender_name>LENDER NAME</a>.

Am I talking to <a id=first_name>BORROWER FISRT NAME</a>

<a id=last_name>BORROWER LAST NAME</a>?</p>
```

Hello. I am calling about your mortgage with ABC Lending Company. Am I talking to Joe Smith?

In this case a custom field called `lender_name` was populated with ABC Lending Company, the `first_name` field with Joe and the `last_name` field with Smith.

Managing Prompts

Use this tab to set up prompts to be played to the agent on call connection and when the caller is on hold. Whisper prompts replace standard beeps and ring tones and provide agents with the context they need to respond appropriately to the caller. You must restart the campaign to activate the new hold music. If the hold time for a call exceeds the length of the configured hold music prompt, the music is repeated.

Call Whisper
Hold Music
Adding a Prompt
Removing the Prompt

Call Whisper

This feature allows the agent to hear a custom prompt (for example, saying the name of the campaign or skill) instead of standard beeps and ring tones. Prompts provide agents with the information they need to respond appropriately to the caller. If the Call Whisper feature is set up, the agent should hear a specific campaign or skill whisper as the call is connected. See *Managing Voice Prompts* in the Basic Configuration Administrator's Guide.

Note

A whisper prompt set for a skill overrides a whisper prompt set for a campaign.

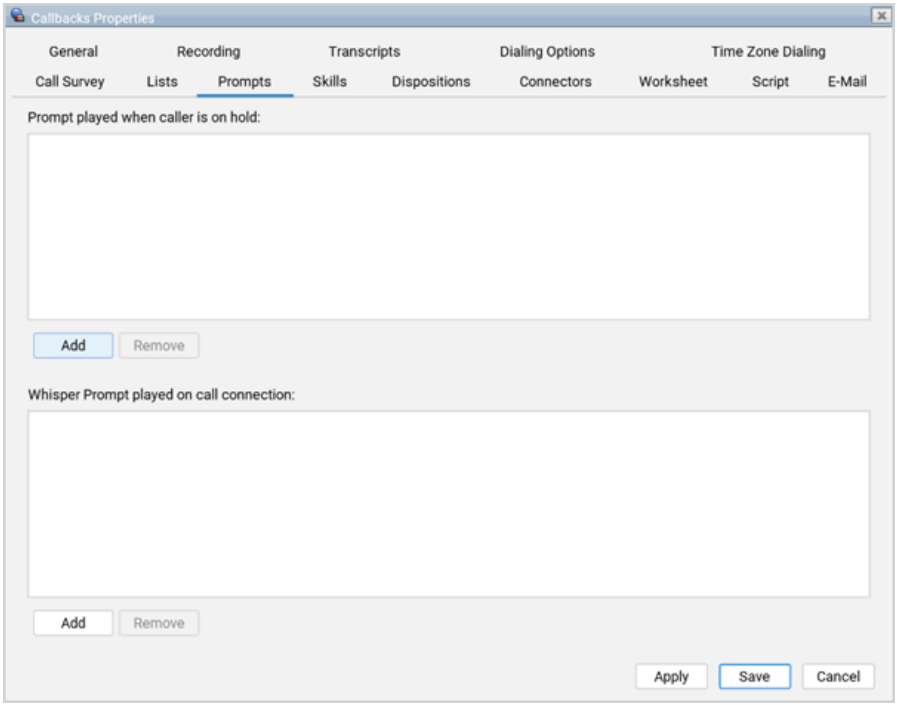
Hold Music

Hold music is one or several audio files which are played to the callers when they go on hold. For example, if you use the Agent/Voice mail Transfer or Skill Transfer IVR module, the connected party hears hold music while waiting for an agent. When the agent uses the Place Call On Hold function, the caller hears the hold music until this call is retrieved.

Your custom hold music can include music in addition to a recorded message such as a marketing message. For example, you may want to provide information about your company or product.

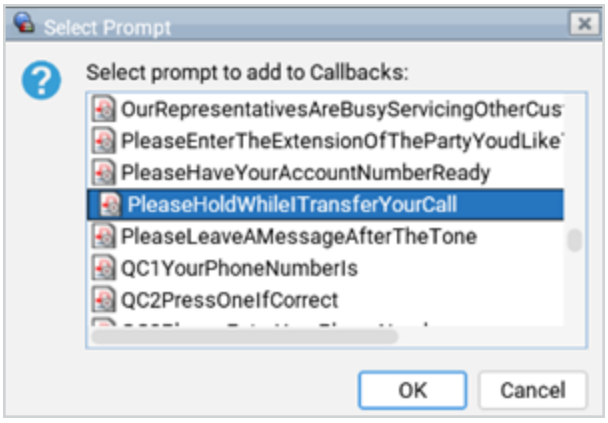
The custom hold music must be saved as a prompt. Five9 recommends keeping the length of hold music files to less than 3 minutes. The file continues to play in a loop as long as the caller is on hold. You must restart the campaign to activate new hold music.

The Five9 VCC provides default hold music. You can override the default hold music by adding a new recording. You can select from either custom or default prompts. Recordings used for hold music must be uploaded under the Prompts folder in the Administrator application.

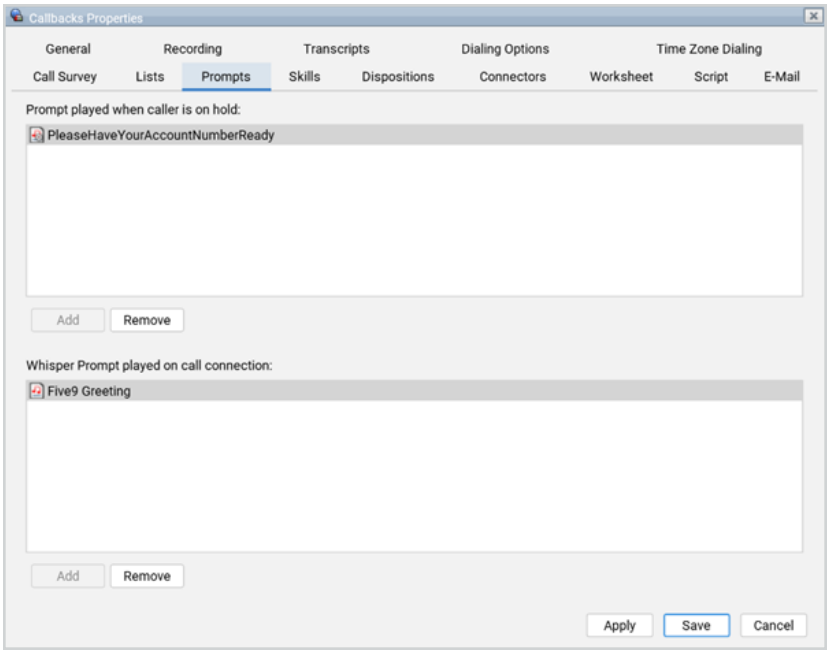


Adding a Prompt

1. In the Prompts tab, click the appropriate **Add** button.
2. Select the prompt you want to add, and click **OK**.



3 Click **Apply** or **Save**. The prompt you selected appears.



Removing the Prompt

1 In the Prompts tab, select the prompt to remove.

2 Click **Remove**.

3 Click **Yes**.

4 Click **Apply** or **Save**.

Configuring Autodial Agent Linkback Campaigns

Agent *Linkback* is a type of autodial IVR campaign flow that plays a message to answering machines and gives the option to talk to an agent. These are described in Autodial IVR Flow Types.

Defining the Maximum Number of Lines
Setting Agent Availability
Providing a Message When Agents are Unavailable
Using the Priority Setting in IVR Modules
Dedicating Skill Groups to Campaigns
Setting the Fast Voice Detection Level

Defining the Maximum Number of Lines

The maximum number of lines that you set for inbound campaigns determines how many people can call your campaign at one time. This includes talking to an agent, on hold, conference calls, or if the call is still being routed by an IVR script. Use this option to set the number of inbound lines allocated to a campaign. In the General tab, set the Max Number of Lines to be dialed by the campaign. When defining an autodial campaign to deliver calls to an agent, limit the number of lines to the number of agents that are available during the call time, plus the number of contacts to be placed on hold. The campaign can stop dialing based on agent availability and when all the configured lines are in use. See also **Autodial Campaigns General Properties**.

The default value is 0. After opening the campaign properties for the first time, you must change this value to a number greater than 0 before saving the campaign. If the number of calls to the campaign exceeds the maximum, subsequent callers hear a busy or fast busy signal or sometimes a voice announcement. The actual experience depends on your telecom provider.

You may want to dedicate specific numbers of inbound lines to each campaign. Alternately, you can set all inbound campaigns to the total number of lines available. Therefore, to prevent callers from receiving a busy signal, be sure to order enough inbound lines to cover your peak usage. Your Five9 domain is provided with a fixed number of lines. To add inbound lines, contact your Five9 account manager.

Setting Agent Availability

In the Dialing Options, if your call flow includes the potential to deliver calls to agents, you must consider starting and stopping the campaign based on the availability of agents. You can use the Agent Availability option for the Autodial Campaign to automatically start dialing only when there are agents available. See **Autodial Campaigns General Properties** for option descriptions.

Agent availability enabled. If the option is enabled, you can select any agent or a skill group in Dial Only if Agents Are Available in the Following Skill Group. The campaign stops dialing if no agents available in the selected skill group. You must define the conditions under which the agents are considered available:

- Ready to Receive Calls
- Ready to Receive Calls or Busy
- Logged In

The campaign can stop dialing automatically if no agents available or the number of lines configured on the General tab is reached.

The Autodial Campaign dials the number of lines configured on the General tab even if only one available agent remains in the skill group. The remaining agents need to process the calls on all lines assigned to the Campaign. The number of lines does not change depending on number of available agents. For example, if you have 10 agents in the skill group and the autodial campaign has 10 lines, but only one agent is ready, the campaign dials 10 lines for that agent.

If an agent goes on break or logs out after autodial has placed a call, the contact reaches the IVR and is processed as if no agents are available.

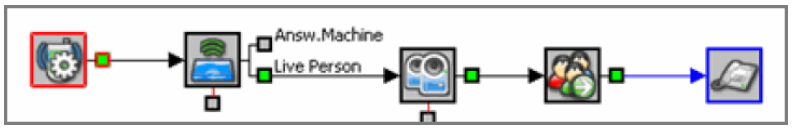
Agent availability disabled. If the option is disabled, the autodial campaign dials a list based on the number of lines available, regardless of the number of logged-in or available agents. The list is dialed continuously, regardless of agent availability. Therefore, you need to start the campaign only when agents are available or to provide an option for voice mail when no agents are available.

Providing a Message When Agents are Unavailable

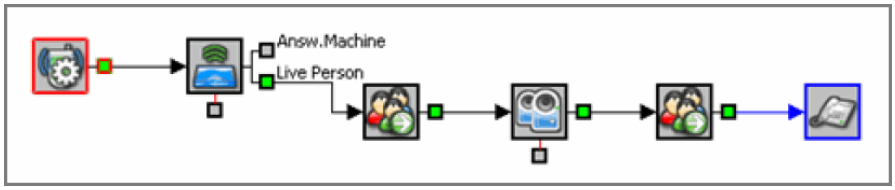
Always provide a message if no agents are available even if you enable Agent Availability. For example, the autodial campaign sees that an agent is available and starts to dial for that agent. Before an answered call is delivered to the agent, the agent goes on break. The message can be played immediately after a call is answered or after

checking a skill group first. Below are sections of an IVR flow demonstrating both options.

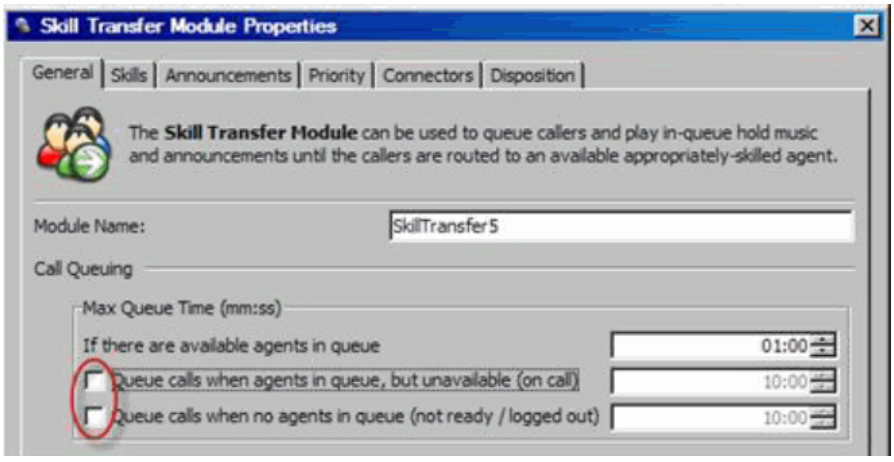
The Play module is first in line with a message stating the reason for the call and then uses a Skill Transfer module to check for agents.



The first Skill Transfer module checks for an agent, with no queue time. If no agents are available, it immediately plays a message using the Play module. After the message has been played, the call is sent to a second Skill Transfer module.



The first Skill Transfer module should be set up with no queue time. If no agents are available, the person hears the message in the Play module before being put on hold. The settings for the first Skill Transfer module are displayed below.



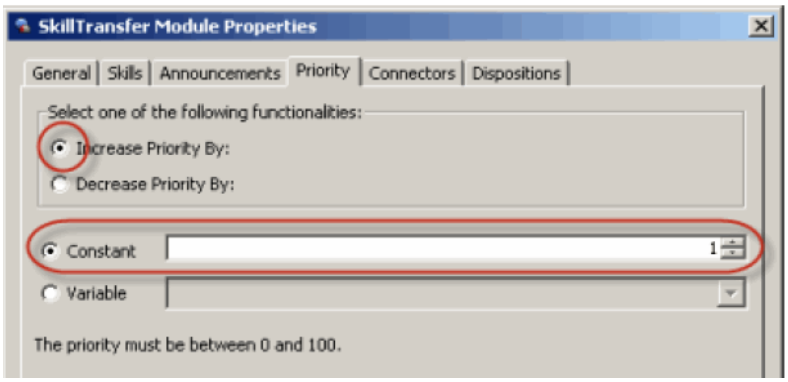
If a call is answered but there are no agents available to immediately take the call, play a message informing the person why you are calling. In other words, do not put the call on hold before stating the reason for the call.

After the Play module, there is a second Skill Transfer module to transfer the call to one or more skill groups. If the call is transferred to an agent in a skill group, the IVR Script is complete. You can set a hold time if no agents are available. The caller hears hold music while waiting for an agent.

Using the Priority Setting in IVR Modules

In the second example above you want to ensure that the calls waiting on hold are answered before any new calls. The people on hold are obviously interested in talking to an agent. You can accomplish this by using the Priority setting in the second Skill Transfer module. Calls with a higher priority are answered before other calls.

In the properties of the second Skill Transfer module select the Priority tab, click Increase Priority By, and set the value to 1.



Dedicating Skill Groups to Campaigns

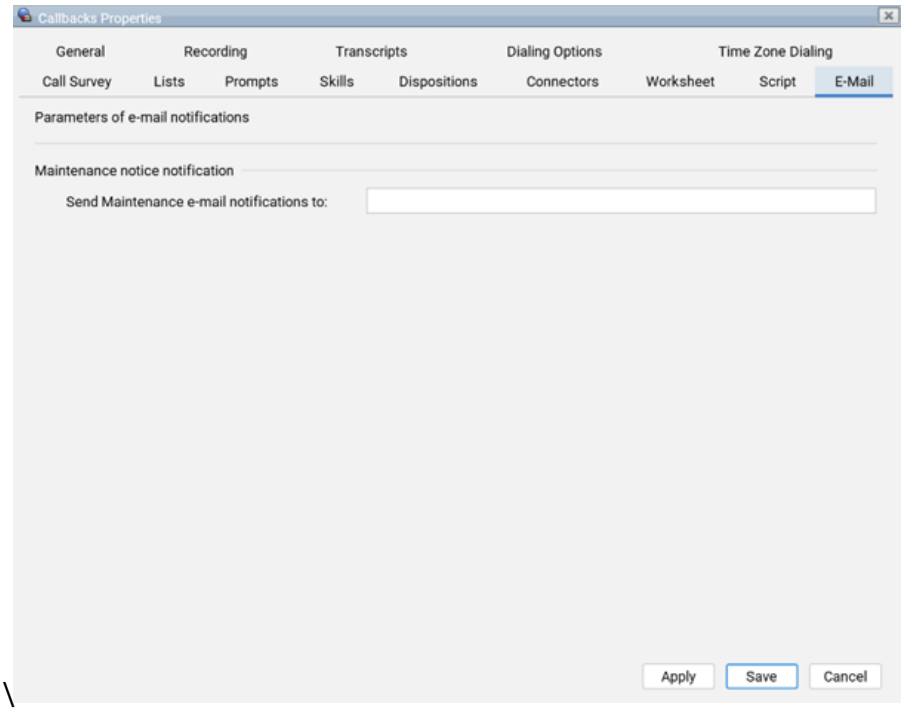
Dedicate a group of agents to the Autodial Campaign. Use a Skill Group to assign your agents to the campaign. Agents working in an Autodial Campaign should not participate in other campaigns at the same time. Stop the Autodial Campaign when you want to switch the agents to another campaign.

Setting the Fast Voice Detection Level

Use the Fast Voice Detection Level setting (the Dialing Options tab in the Autodial Campaign Properties window). Agents are connected to calls with more answering machines, but the setting decreases the delay in connecting the calls after saying hello.

Configuring Email Notifications

In the E-Mail tab, you can set for each campaign an email address for maintenance notifications that can affect your campaign. You can use a different email address for each campaign or type of campaign.



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Configuring Voice Mail Notifications

You can send an email notification when an agent or other user receives a message. Depending on the configuration, the email message can be an attachment.

When a message is delivered to a user account, the system sends a message to the email address configured in the user account properties. The user account can be any account that receives messages, such as agent accounts or accounts selected to receive messages in an inbound IVR. An IVR script can be configured to send calls to a specific voice mailbox outside of business hours. In this case an email notification can be sent to an on-call or after hours email address. The messages can be managed even if there

are no users currently online. Messages attached to emails can be reviewed without user access or without logging in to the VCC.

Agents can receive messages when a call is transferred from another agent, from an IVR script, or from an extension transfer in an IVR script. For each user account, you can select if an email message is sent when a message is received. You must enter a valid email address in the User Properties window. You may also configure an error handling email address in **Actions > Configure**, which is used as the Reply To address. See *Managing Voicemail* (Users) in the Basic Configuration Administrator's Guide

The email message has a subject line of Five9 Voicemail Alert and includes the phone number of the caller and the time and date it was received. If the source number does not provide Caller ID, it appears as Unknown Caller.

Ensure that the recipient's email server accepts messages with attachments and that the file size limitation is configured to allow a WAV file larger than one megabyte. If the receiving email server imposes a limit on attachment size, and the message exceeds this limit, the email is delivered without the attachment. In this case, the message remains in the voice mail recording section of the user account properties.

If a message delivery fails (bounces), the failure notification message is sent to the error handling email address. A copy of the message remains in the User account properties and can be accessed from the agent, supervisor, or administrator applications.

A message can be transferred to another agent. When a message is transferred, an email is sent with this subject, Five9 Voice Mail Transfer Alert, which contains the name of the administrator that transferred the message, the date and time, and the source phone number of the message.

Voice mail notification enables users to check general or group messages for inbound campaigns. Many times an IVR branch ends with a caller leaving a message for a department or group rather than for an individual. For example, you may have an IVR branch that delivers calls to support agents. If an agent does not pick up the call after the specified hold time, the caller can leave a message for a fake user account, used primarily as a general voice mailbox. With email notification, this message can be distributed:

- Sent to an email distribution list for all support staff
- Sent to a shared email box where support staff pick up the messages
- Sent to a support manager who distributes the messages based on the content

Resetting List Position in Outbound and Autodial Campaigns

By default, the dialer attempts dialing all the records in the lists before starting over from the top of the list order. Resetting the list position forces the dialer to start from the top of the list at the desired moment of time. The dialing is started over from either the first records that were added to the list, or from the beginning of a specified sort order. See also, **List Order for Outbound Campaigns**. You can also reset list position automatically on the scheduled time by using workflow rules (see **Dialing Rules**.

In some cases, you may need to make the dialer start dialing from the beginning. You and supervisors can manually reset the dialing list position. Resetting the list position is logged in the Event Log.

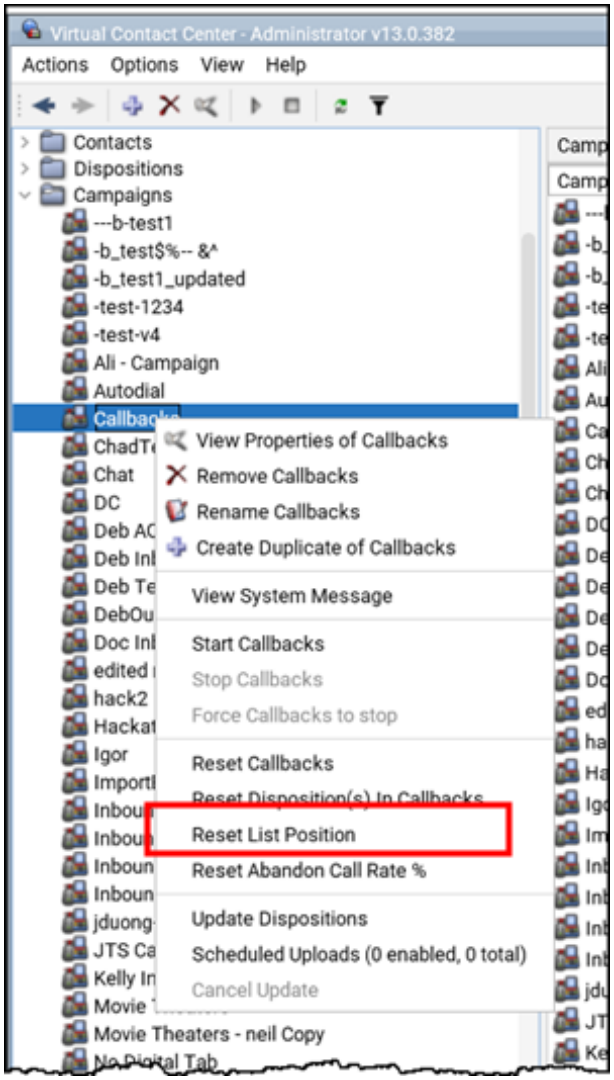
The dialer remembers the list position even after stopping the campaign. If a campaign is and restarted, the dialer returns to that position. Unless the list position is reset, it completes the entire list or lists before returning to the top and starting to dial numbers marked for redial without a timer.

The list position is maintained for each campaign. If you move a list to a different campaign, that campaign starts dialing from the top even if another campaign has partially dialed it.

If you partially dial one list, stop the campaign and add a second list with higher priority, then the dialer will start at the top of the new list. After completing the new list, it will continue with the original list at the position where it left off.

There are several exceptions that would cause a record to be dialed seemingly out of order. Usually, this would happen because of a Redial-type Disposition with a timer.

1. Click the **Campaigns** folder.
2. Right-click a campaign name, and select **Reset List Position**.


Virtual Contact Center - Administrator v13.0.382
Actions
Options
View
Help
Contacts
Dispositions
Campaigns
---b-test1
-b_test$%-- &^
-b_test1_updated
-test-1234
-test-v4
Ali - Campaign
Autodial
Chat
DC
View Properties of Callbacks
Remove Callbacks
Rename Callbacks
Create Duplicate of Callbacks
View System Message
Start Callbacks
Stop Callbacks
Force Callbacks to stop
Reset Callbacks
Reset List Position
Reset Abandon Call Rate %
Update Dispositions
Scheduled Uploads (0 enabled, 0 total)
Cancel Update
Movie Theaters - neil Copy