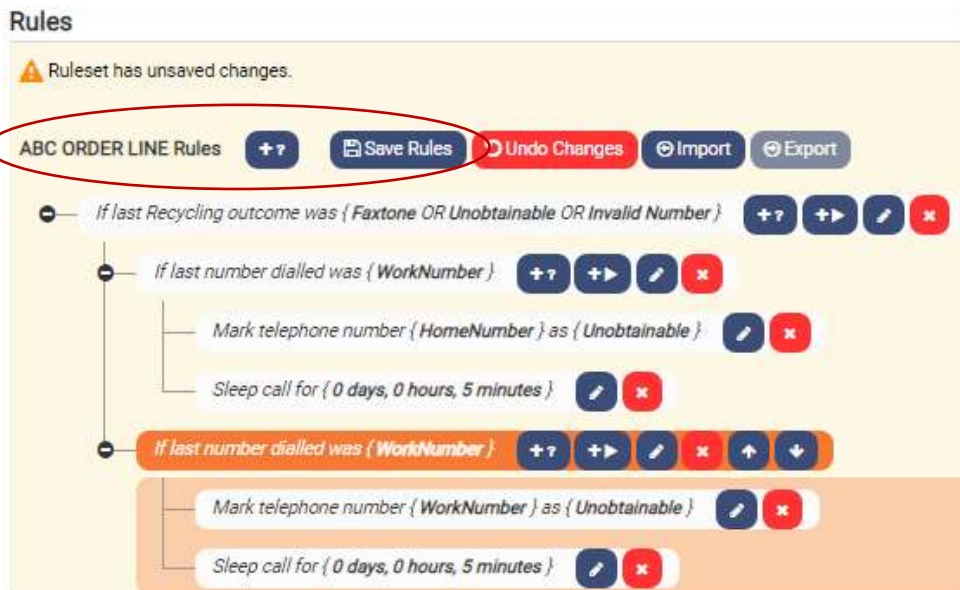
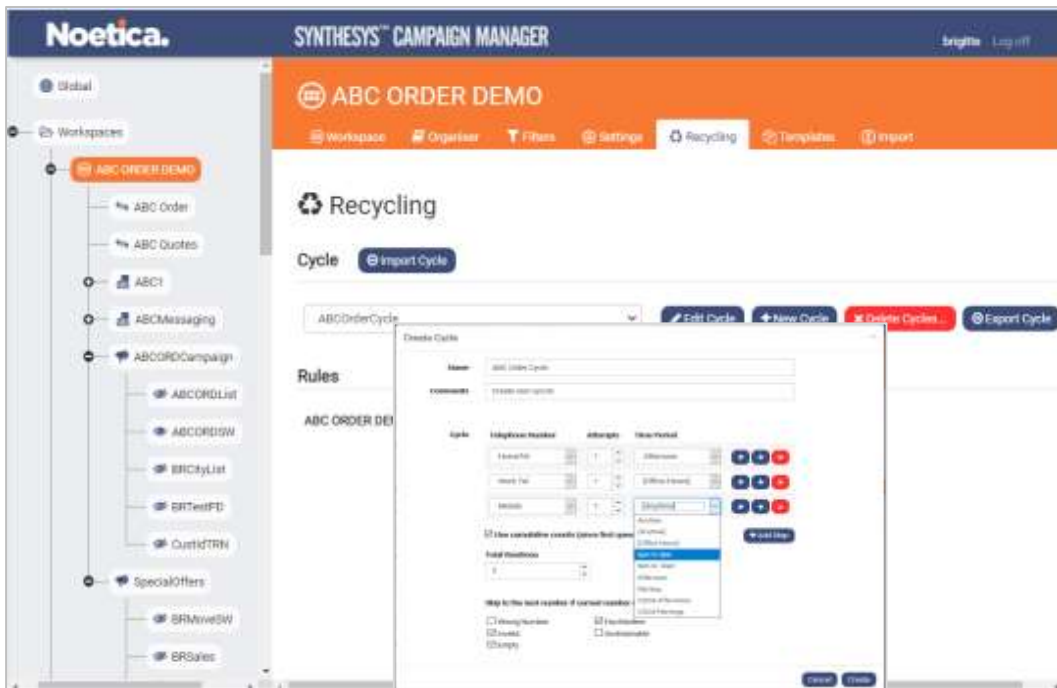


CALL RECYCLING



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Call Recycling

Last updated April 2021

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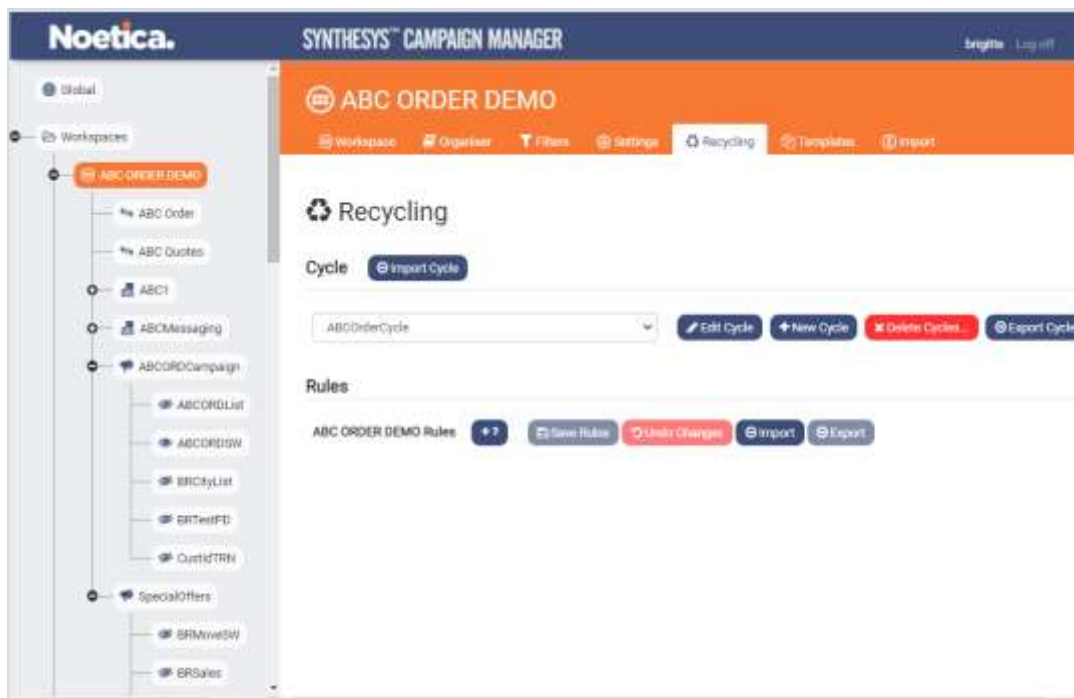
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CALL RECYCLING

Call Recycling, available at workspace, campaign, and list level, enables users to create call cycles and recycling rules to help manage call lists in accordance with their requirements and contact strategies.



The Cycle and Rules section buttons provide access to the following functionality:

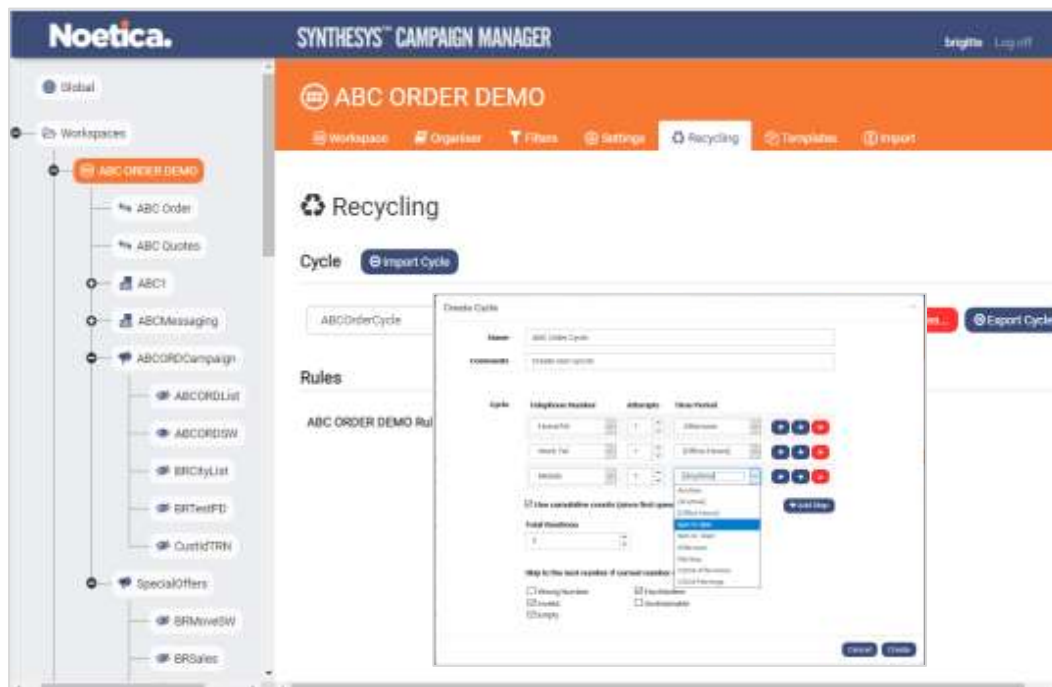
Buttons	Description
Cycle	
Import Cycle	Allows users to import existing call cycles that share the same Entity.
Edit Cycle	Enables users to make changes to existing call cycles.
New Cycle	Enables users to create new cycles to determine which telephone numbers to call, how often to dial each number and in which time periods.
Delete Cycles	Allows users to delete existing call cycles if they are not currently assigned
Export Cycle	Used to export existing cycles to a location of your choice.
Rules	
+ ?	Allows users to create new recycling rules, defining the conditions and actions to be taken
Save Rules	To save the recycling rules created.
Import	Allows users to import existing recycling rules that share the same Entity.
Export	Used to export existing recycling cycles to a location of your choice.

Creating Call Cycles

The call cycles that you create will determine, which telephone numbers to dial, the call attempts to be made per number, and the time when to dial the number.

To add your call cycles, select the workspace, campaign, or list in the tree on the left, and click the **Recycling** (Call Recycling) tab at the top right of the dialog.

- In the Recycling dialog, click the **+New Cycle** button to create a new call cycle.
- Click the **Edit Cycle** button, to make changes to existing cycles.
- Use the **Name** field, to enter or edit the name for your call cycle.
- Add a brief reason for saving your cycle into the **Comments** field.



- In the Cycle section, click the **+Add Step** button to display the **Telephone Number**, **Attempts** and **Time period** fields, and select the number to be dialled, enter the dial attempts to be made on this number and at which time.
- Click **+Add Step** again, to specify details for further telephone numbers, as required.
- Use the **Up** and **Down** buttons, to move the rows to the top or bottom of the cycle.
- Next, select if you wish to **Use cumulative counts** (since first queued).
- In the **Total Iterations** field, enter the number of repetitions for the cycle.
- In the section **Skip to the next number if current number is marked as**, you can select any of the telephone states, to instruct the dialler to move directly to the next number in the cycle, without dialling a marked or empty number again.



To mark telephone states as Wrong Number or Unobtainable for example, you need to create the corresponding recycling rules for each telephone number in the Rules section of the Call Recycling dialog.

Dialling and Recycling include the dialled telephone name, to allow cycles and recycling to cope with the same telephone number in multiple telephone fields.

Recycling cycles can be deleted if they are not currently assigned to any call lists.

Creating Recycling Rules

Recycling rules consist of a sequence of conditions and actions. Some conditions you will create at top route level, others as part of an existing condition to define further associated details. Having created your conditions, you then add the actions that will determine what should happen to the call next.

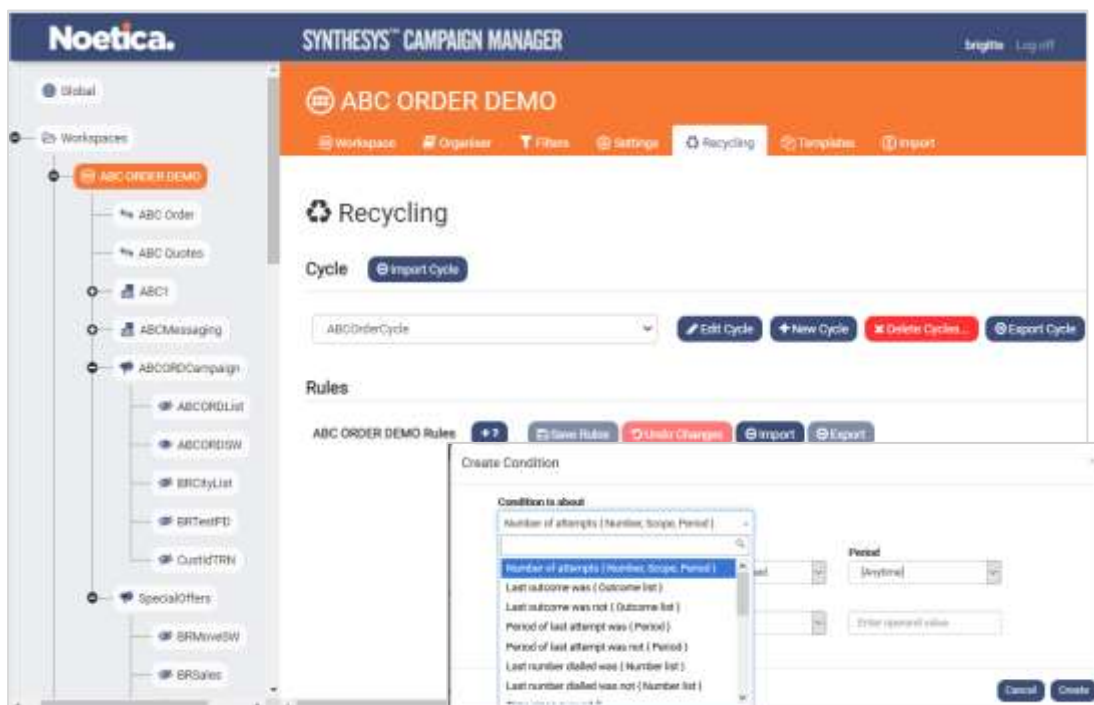
Recycling rules can be created at workspace, campaign, and list level, as required.





At workspace level, you should only create the recycling rules that are to be applied to all campaigns and call lists in the selected workspace. At campaign level, only create the rules that will apply to all lists for the selected campaign.

At list level, you can then add any further recycling rules that will apply to each individual list only.

To create your recycling rules, select the workspace, campaign, or list in the tree on the left, and click the **Recycling** (Call Recycling) tab at the top right of the dialog.



In the **Rules** section of the recycling dialog

- Click the **+? Create Condition** button at top route level.
- Use the **Condition is about** menu in the **Create Condition** dialog, to select the option that you need to define your condition.
- Depending on your selection, the Create Condition dialog will adjust, each time displaying the fields required to create the condition.
- To define further conditions, click **+?** either at route level or on an existing condition, depending on the details that you need to specify.
- Next, click the **+> Add Action** button, and from the **DO What** drop down menu, select the action to be taken.
- Click the **Save Rules** button, to save your conditions and actions.
- To edit or delete existing conditions or actions, click the Edit , or Delete  icons.

Example

To stop dialling a customer's home, work, or mobile number, if the first dial attempt was a faxtone, unobtainable or invalid:

1. Create the first condition (at top route level) to identify the telephone states:
 - Click the **+?** to open the **Create a Condition** dialog, select the condition **Last Outcome was**, and then the telephone states Faxtone, Unobtainable and Invalid Number.
 - Click the **Create** button, to create the condition "If recycling outcome was **{Faxtone OR Unobtainable OR Invalid Number}**".
2. Next, add sub conditions to this first condition, to specify each telephone number in turn.
 - Click **+?** on your first condition "If recycling outcome was {Faxtone OR Unobtainable OR Invalid Number}", base the new condition on **Last Number dialled** and select the first number (**HomeNumber**). Click the **Create** button, to add the condition "If last number dialled was **{HomeNumber}**".
 - Repeat this step, for the **Work** number and **Mobile** number, if used.
3. Add the corresponding action to mark each of the telephone numbers as Unobtainable, if the last outcome was *Faxtone*, *Unobtainable* and *Invalid Number*.
 - Click the **+> Action** button on "If last number dialled was {HomeNumber}" and select **Mark telephone number as** from the **Do What** drop down menu.
 - In the *Number* section, select **Home Number** and in the *Status* section **Unobtainable**. Click **Create**, to add the action "Mark telephone number {HomeNumber} as {Unobtainable}".
 - Next, click the **+> Action** button, again on "If last number dialled was {HomeNumber}" and select either **Queue call** or **Sleep call** for {SleepPeriod} with a maximum lateness of {LatestPeriod} to sleep the record for a specified time, before the next dial attempt.
 - Repeat the steps for the Work and the Mobile number, then click the **Save Rules** button.



- Click the **Save Rules** button, to save the changes made.



When selecting a recycling rule, you can use the **Up** and **Down** arrows to move the rule to a different position. When re-ordering a recycling rule option, you need to ensure however that the logic of the rule remains intact.

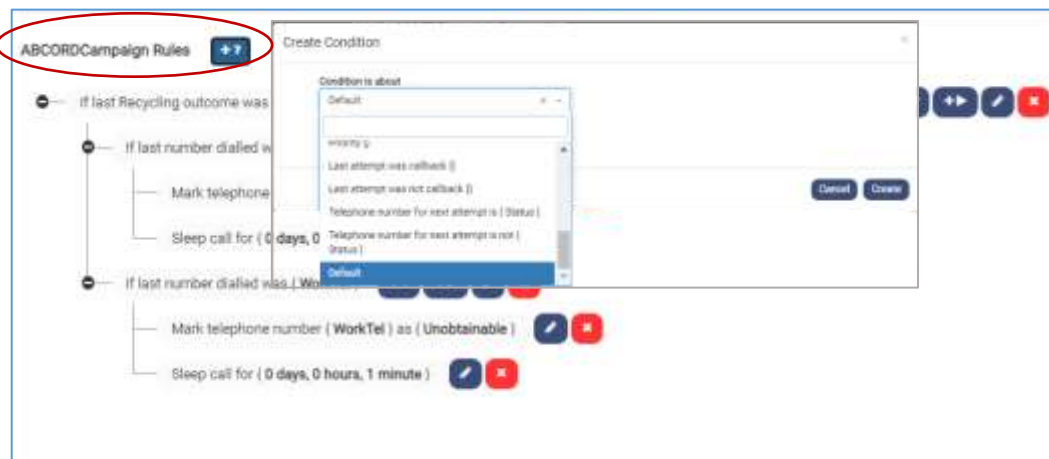
Creating a Default Recycling Rule

The **Default** recycling condition enables you to create your own default rule, to identify calls that have passed through recycling without meeting any of the rules applied, thus indicating that there may be rules missing.



The Default rule can only be placed as the last condition of the root level of the recycling rules. It cannot be moved, only added, and removed. The Default rule can have only one Action.

- Click the **+? Add Condition** button at top route level of your recycling rules.
- In the **Create a Condition** dialog, select the **Default** option.



- Click **+> Action** on the Default condition and choose from the **Do What** drop-down menu, which action to use to identify calls passing through the default recycling rule.
- For example, you could select **Mark Record as {Status}**, and then **Attention**.



- Click the **Save Rules** button, to save the changes made.

Available Recycle Conditions

Create Condition	Based on
Number of attempts {Number, Scope, Period}	[Any Number], [Last Number]), or a telephone as selected; the Scope (i.e., Since first queued or in this list only) and time period, and the selecting if It is (or It is not) equal to OR less than OR less than or equal to, OR greater than OR greater than or equal to a specified value
Last outcome was {Outcome list} Or Last outcome was not {Outcome list}	Dialler Automated Call Results and Agent Aborted Call results, such as Unavailable, No Answer, Busy, Answerphone etc. or Agent Completed Call Results selected from within the scripted app. Call outcomes selected in a third-party application can be coded to be passed back to the dialler via the SDK, enabling dialler managers to map these to a recycling outcome when building recycling rules.
Period of last attempt was {Period} Or Period of last attempt was not {Period}	Time bands, as set via the Time Periods tab at workspace level.
Last number dialled was {Number list} Or Last number dialled was not {Number list}	[Any Number], or a telephone number as selected.
Time since queued {}	The days, hours and minutes since the call was placed into the call list
Time since first attempt ({Scope })	The Scope (Since first queued; in this list only) and days, hours and minutes since the first call attempt.
Is tied to agent {}	Call being assigned to an agent
Is not tied to agent {}	Call not being assigned to an agent
Entity {field}	Information contained within Entity fields
Priority {}	The Priority allocation of the call in the Phoenix_Queue table, set via Bulk Queue Change (0 to 9), or a string value, e.g., 'High' or 'Low'
Last attempt was callback {}	
Last attempt was not callback {}	The last call attempt was rescheduled
Telephone number for next attempt is {Status} Or Telephone number for next attempt is not {Status}	The status to use in your condition, i.e., Empty; Invalid; Unobtainable; Wrong Number or never call.
Default	Can be placed as the last condition of the root level of recycling rules, with one action, to identify records that pass through recycling without meeting a rule, indicating there may be rules missing.

Available Recycle Actions

Actions	Description
Mark telephone number as {Number,Status}	Allows users to set a selected telephone number as Unobtainable; Wrong Number; Never Call or DoNotCall (DNC).
Mark record as {Status}	Allows users to set the record to Attention; Unobtainable; Never Call; DoNotCall (DNC); Wrong Number or Recycling Complete
Move to outbound list and sleep {SleepPeriod} with a maximum lateness of {LatestPeriod}	Will move the call as a queued or sleeping call (ticking Sleep, entering the sleep and latest time in days/ hours/ minutes) into a selected list with a new queue ID, marking the initial call as Finish in the original list.
Queue call	Queues the call to the current list, keeping the same queue ID and with the number of times called remaining unchanged.
Re-queue call	Re-queues the call to the current list with a new queue ID, and the number of times called set to zero (0) and marks the original call as Finish.
Set agent assignment {Action}	Allows users to select Attach to assign the call to an agent or Detach if any agent can handle the call at run time.
Set period of next attempt {Period}	Enables users to select the time band (defined via the Time Periods tab at workspace level), to instruct the dialler when to re-present the call to the agents at run time.
Set next attempt in {TimeFromNow}, trying for {RetryPeriod} and set state as {State}	Used to specify the next call attempt with a maximum lateness, in days, hours & minutes from the time the call is aborted, and to select a queue state of Rescheduled, Instant Callback (Priority), or Queued (without a time specification).
Set telephone number for next attempt {Number}	Allows users to select the telephone number to be dialled for the next call attempt.
Sleep call for {SleepPeriod} with a maximum lateness of {LatestPeriod}	Allows users to sleep the call for a specified number of days, hours, minutes time, before it will be re-presented agents (e.g., sleep No Answer for 4 hours)
Stop Recycling	Mark recycling as Finish so the call is no longer being processed through any other recycling rule.