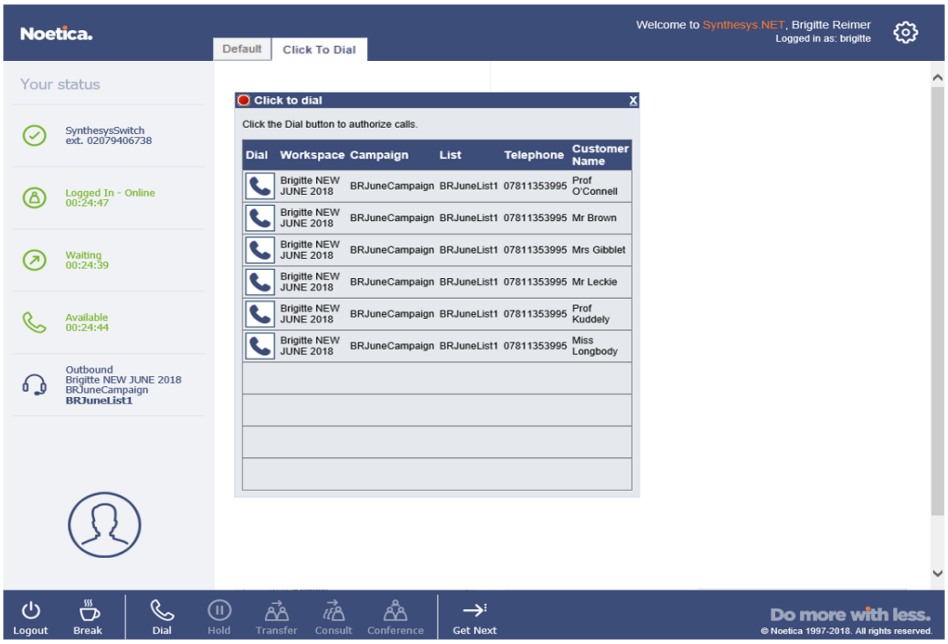
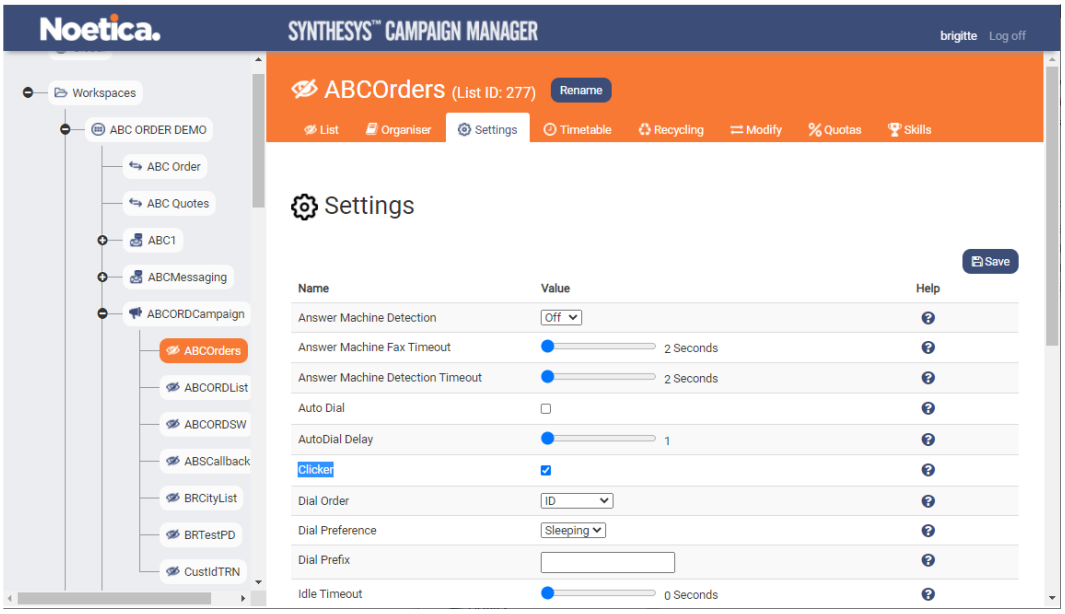
TCPA COMPLIANT TOOL

The Clicker





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Campaign Manager Break Reasons

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THE CLICKER TCPA COMPLIANT TOOL

Introduction

The new TCPA compliant tool built into the dialler known as the Clicker, has been developed to assist our customers to comply with US FCC (Federal Communications Commission) TCPA regulations which stipulate that mobile (wireless) numbers cannot be dialled by an ATDS (Automatic Telephone Dialling System) without human intervention.

The TCPA compliant tool consists of a **Click to dial** web part hosted within the Agent's Portal and a **Clicker** property in the Settings page of the Campaign Manager.

With the Clicker activated, the dialler will fill the **Click to dial** web part with records that need to be cleared for dialling. Outbound Agents, while waiting between calls, need to click on the records to notify the PD that the number can now be dialled.

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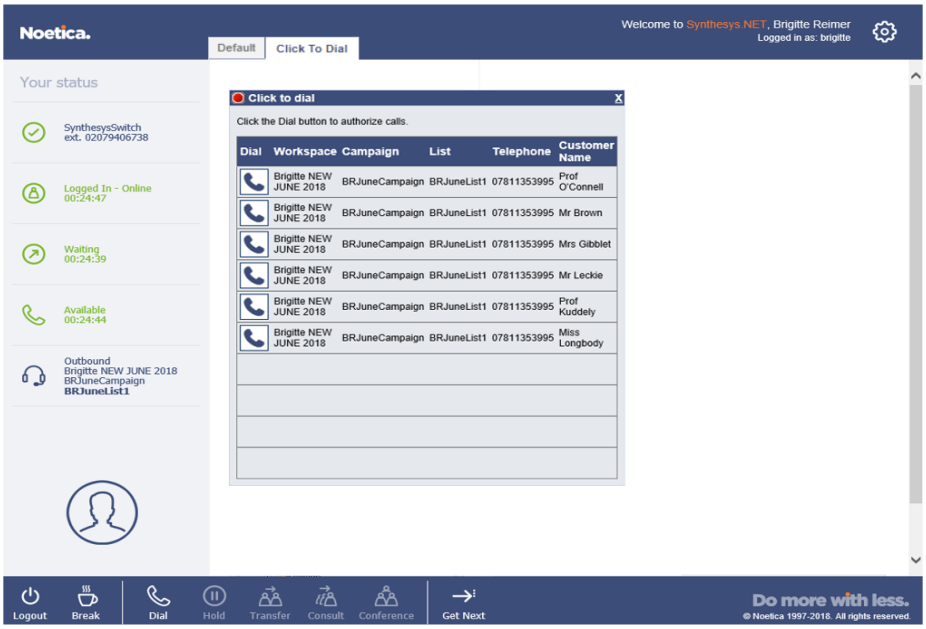
Click to Dial Web Part

If the **Click to dial** web part is not already displayed in the Agent Portal, you can add the option, providing that you have the relevant access permission.

*When using Clicker with other web parts in the Synthesys™ Agent Portal, it is best to put the "Click To Dial" option in a second tab/ portal page. Go to **Settings/ Add new page**, to add the page, before following the steps below.*

- Go to the **Settings** icon at the top right of the Synthesys™ Portal screen.
- Select **Catalog** and then tick the check box next to the **Click to dial** option**.**
- Click the **Add** button, to add the web part to the Agent Portal.

The Clicker web part shows a telephone button, the name of the workspace, campaign, call list and customer to be called and the telephone number to be dialled.



With the Clicker setting activated, the dialler will load the **Click to dial** web part with a set of records just before they should be dialled, taking into consideration the number of agents logged in and their team membership. Agents are thus only presented with records from call lists in their respective teams.

To clear a record so that it can be dialled predictively:

- Click on the telephone button to notify the PD that the number has now been cleared for dialling.
- When a record has been clicked it will disappear from the list.
- The web part will be refreshed every few seconds, loading the next set of records that agents need to click to authorize the PD to dial them.

With the Clicker setting enabled, the PD will not dial any record predictively unless it has been clicked by an agent first. If several users click on the same record, the first click triggers the notification to the PD and any further clicks will simply be ignored.

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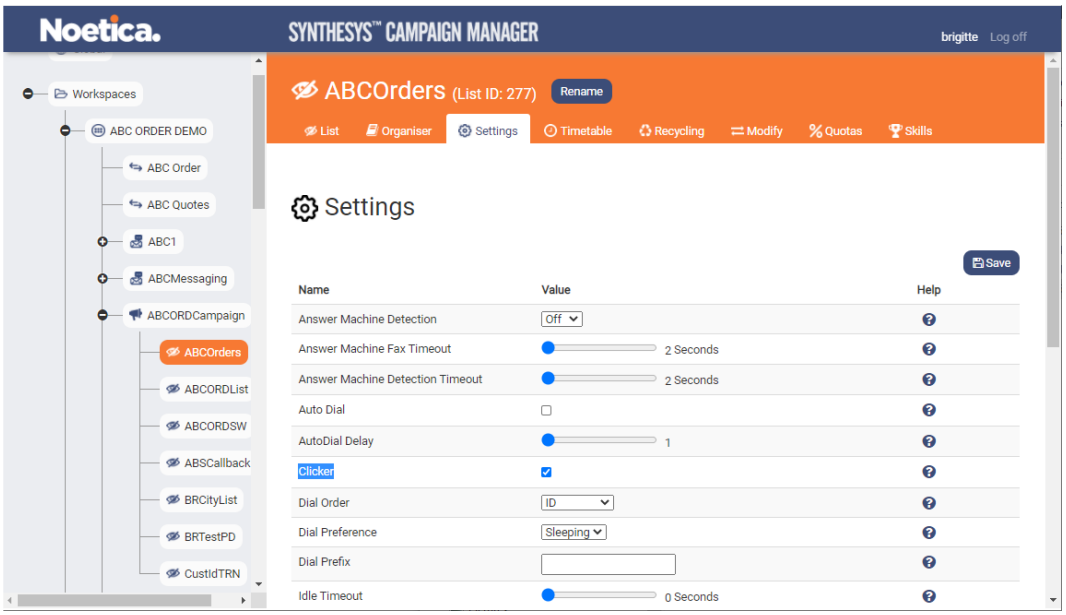
Clicker Property Setting

The Clicker is activated in the **Settings** page of the Campaign Manager.

- Select the relevant campaign or list and click the **Settings** tab at the top right of the dialog to open the associated Settings page.
- Place a tick into the **Clicker** checkbox to activate the Clicker.



Auto Dial Setting

When the **Clicker** setting is activated, Auto Dial should be deactivated, i.e., not ticked, as records presented in preview mode, will not be loaded into the Click to dial webpart and therefore can't be cleared for dialling by an agent.

To prevent calls being auto dialled without agent clearance, the dialler will simply ignore an active Auto Dial setting.

- Consequently, all calls presented from clicker enabled **Preview list** will have to be dialled manually by the agent.
- For clicker enabled **Predictive lists,** agents need to dial Rescheduled, and Priority (Instant call-backs) calls manually, as they will be presented in preview mode.

Outbound Group Settings

If you are using the TCPA compliant Clicker in the context of list groups, please observe the following guidelines:

1. The dialling mode of the group needs to be the same as the dialling mode of any list within the group. In other words, a predictive group should only contain predictive lists and preview groups should only contain preview lists. Any deviation from this rule may result in non-compliance with TCPA.

2. When using preview groups which include Clicker enabled lists, please ensure that the Auto Dial setting is deactivated on the group, otherwise calls may be auto-dialled without having been pre-clicked by an agent in possible contravention of TCPA.

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