2. Progressive Dialer

Description

The dialer with the reservation of the operators pre-reserves the free operator, after which it automatically dials to the subscriber.

Campaign setup

Calendar

Before proceeding to the settings of the outbound campaign, you must create a calendar on which the campaign will work. The calendar is created in the Calendars section of the Webitel web client. The calendar contains the start and end date of the campaign, the time zone, the time of work depending on the day of the week, as well as holidays:

General settings

In the Dialer section, create a new campaign with the **Progressive Dialer** type.

> ⓘ   If you have several active campaigns that use the same outgoing lines, then you can specify the priority (Priority), according to which the dealer will work out the sequence of sample numbers from the campaigns.

After specifying the name of the campaign and selecting the previously created calendar, go to the block with parameters (Parameters).

#	Parameters	Description
1	Limit	The number of simultaneous outgoing lines that the dialer will use. If you specify 10 lines, the webitel will ensure that the number of simultaneous calls does not exceed the specified limit.
2	Wait between retries (in seconds)	If the autoinformer could not reach the subscriber by one of his numbers, he will resume trying again after a time (in seconds) not less than the one specified in this field.
3	Maximum number of retry	This field indicates the number, how many times the dialer will try to call the subscriber (with a pause indicated in # 2 of this table) until he stops trying to dial and sets the final result as MAX_TRY_COUNT
4	Minimum succeed call duration (in seconds)	After the subscriber has answered, the dealer waits for the time (in seconds) specified in this field. If the subscriber or operator ends the conversation earlier, then the diler will consider such a call not successful and will resume dialing attempts after the time specified in # 2, but not exceeding the number of attempts specified in # 3. If the subscriber is on the line more than this time, then at the end of the call, the dialer will set the end result as NORMAL_CLEARING, and stop dialing attempts.
5	Wrap up time	If the **Waiting for result status** parameter is enabled, then only that call will be considered successful, after which the system received confirmation from the operator (from any client application using the HTTP REST API) for the time specified in this parameter (in seconds). Otherwise, the duration of the call from the **Minimum parameter succeed call duration (in seconds)** will be taken into account.

> ⓘ   If it is necessary for all subscribers in the campaign to transfer the same variables to the channel, you can use the **Variables** tab for this task.

If you have several active campaigns that use the same outgoing lines, then you can specify the priority (Priority), according to which the dealer will work out the sequence of sample numbers from the campaigns.

Cause

On the Cause tab, call completion codes are listed from the list and how the dealer must handle these codes.

- **Error** - having received one of these codes, the dialer stops calling the subscriber immediately.
- **Retry** - having received one of these codes, the dialer continues to dial to the subscriber within the specified number of attempts.
- **OK** - successful completion of the dialer for this subscriber.
- **Minus** - codes from this list do not affect the number of dialing attempts. Receiving this answer, the dialer does not stop dialing and does not increase the number of attempts made.

Assignment of operators

To assign agents to work in an outbound campaign, you need to include the **Agent** attribute in the Directory card and set the necessary parameters for each operator.

- **Call timeout** - Call duration in seconds to the operator. If the operator does not answer the call within the specified time, the system will retry after a time specified in the **No answer delay** field.
- **Wrap up time** - The duration of the post-processing status after a successful call. Dialer does not consider the operator in this status for distribution, but waits for him to be "Ready" again.
- **Max no answer** - The maximum number of consecutive calls without an answer from the operator, after which the system will force it to take a break.
- **Busy delay** - Pause in seconds until the next call, after the operator has entered the DND status on the incoming dialer call.
- **Reject delay** - Pause in seconds until the next call, after the operator rejected the incoming dialer call.
- **No answer delay** - Pause in seconds after the operator did not answer the call during the entire call that lasted the time specified in the **Call timeout** field.

Operators in the Operators in the Tiers block are assigned to perform a given campaign.block are assigned to perform a given campaign.

Upload subscribers

Subscribers can be added to the campaign using the Webitel web client, importing from a CSV file, or using the REST API interface.

Dialing the numbers specified in the subscriber cards is performed using standard outbound routing

- Configure outbound routing
- 08 Callflow

If you need to set the duration of the call to the subscriber, set the value of the variable **call_timeout** in one of the outgoing routes; by default, the call will last 60 seconds. Setup Example:

Upload using Web client

Just press the green "Add" button and enter the customer data for the call:

- **Name** - Arbitrary subscriber name
- **Priority** - The priority of processing this subscriber by the dealer from the list of all subscribers.
- **Expire** - If the subscriber was not processed before the specified time and date, it is automatically excluded from further dialing with the termination code MEMBER_EXPIRED
- **Communications** - A list of telephone numbers where you can reach this subscriber. Please note that within the same campaign, the numbers cannot be the same for different subscribers.
- **Variables** - Individual variables for a given subscriber. They also get into the call channel and can be used in the JSON Scheme.
- **Run after adding members** - If this option is enabled, after adding a new subscriber, the campaign will automatically start.

Upload using CSV file

To upload the list of subscribers from a CSV file, use the "Upload" button.

In the file pre-processing window, you can specify the character set, the separator used, ignore the first line. For the necessary columns from the file, specify the destination of loading in the subscriber's card fields.

Upload using REST API

The list of clients to be dialed is transmitted via a **JSON** file using the **POST** method to the Webitel server.

Request example:

```
POST /api/v2/dialer/571f2e2e6ea6478aba60581a/members?autoRun=true HTTP/1.1

Content-Type: application/json
X-Access-Token: eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJleHAiOjE0NDIwMDIxNzkzNTh9
X-Key: 8fd26a17-eb28-4c74-aa6f-a3794f4f466c
```

Body
| ```json
{
        "name":" ",
        "priority": 0,
        "timezone":"",
        "variables": {
                "debt": 20000,
                "language":"",
                "productID":"8fd26a17-eb28-4c74-aa6f-a3794f4f466c"
        },
    "communications":[
                {
                        "number":"099998888",
                        "priority":1
                }, {
                        "number":"3434534534534",
                        "priority":2
                }
        ]
}
``` |

Body JSON

Variable	Type	Description
name	string	Arbitrary subscriber name
priority	int	Call priority (any integer). The default is 0.
timezone	string	Time zone of the subscriber. If not specified, the value is taken from the campaign settings. http://api.webitel.com/en/latest/tz-table.html - value from the **fs_timezone** column
| communications | array | An array of telephone numbers with priorities for dialing one subscriber, if it is necessary to specify more than one means of communication for enumeration.<br><br>```json
"communications": [
        {
                number: "+380890000000",
                priority: 2
        },{
                number: "0910000000",
                priority: 1
        }
]
``` |

variables	object	JSON object with variables and their values that the dialer will transmit to the call channel. Here you can set any variables from the list required in the project, like: • Contact ID • Credit Application ID • Product • Customer status • The language of communication Filling example: ```\n"variables": {\n "language": "ru",\n "productID": "8fd26a17-eb28-4c74-aa6f-a3794f4f466c"\n}\n```

Campaign start and stop

After completing all the presets, the campaign can be started by pressing the **RUN** button. When the dialer processes the entire subscriber list or ends the "before" period specified in the calendar, the campaign will automatically stop. You can also stop a campaign by pressing the **STOP** button.

Subscriber status change via REST API

If the **Waiting for result** status parameter is enabled and the system has connected the operator with the subscriber, the operator can send the result of the call to Webitel upon completion of the call. By default, if a request is not received from the operator, the system considers the call as not successful and continues to attempt to dial through the time specified in the **Wrap up time** parameter.

Request example:

```
PUT /api/v2/dialer/571f2e2e6ea6478aba60581a/members/431a2e3e6eb6453afa61583e/status HTTP/1.1

Content-Type: application/json
X-Access-Token: eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJleHAiOjE0NDIwMDIxNzkzzNTh9
X-Key: 8fd26a17-eb28-4c74-aa6f-a3794f4f466c
```

Body

```
{
        "success": false,
        "reset_retries": false,
        "next_after_sec": 3600,
        "next_communication": "380910000000",
        "stop_communications": ["380920000000", "380930000000"]
        "comment": "      "
}
```

Body JSON

Variable	Type	Description
success	boolean	• **true** - Successful call. Stop calling the subscriber for all other numbers. • **false** - Not successful call. Continue dialer attempts.
reset_retries	boolean	**true** - completely clear all attempts on all means of communication subscriber and start from the beginning.
next_after_sec	integer	If specified, the time in seconds after how much to make the next attempt to dial the subscriber. If the time is not specified, the value from the dialer settings is taken into account.
next_communication	string	What number to make the next attempt. If no number is specified, the number will be selected in order of priority. If a new number is specified, it will be added with a higher priority.

stop_communications	array	Array with numbers that no longer make any attempts to dial. Or, you can specify all (as a string), then the call to all numbers will be terminated, except for the one specified in the **next_communication** field `"stop_communications": "all"`
comment	string	Any comment on the action

Operator statuses and call distribution

In order for the dialer to begin distributing the call to the operator, several conditions must be met:

1. The operator must have a registered SIP or WebRTC phone (**ONHOOK**):

2. If using bpm'online or another system connected via WebSocket, must be "green" online and CC
3. If you are not using a connection using the WebSocket protocol, then you log in using the service number, which must establish:

   `"status": "Available",`
   `"state":  "Waiting"`

4. You can view the current status of the operator (except its registration) in one of the kibana widgets or by opening the operator status change card:

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