Evolve Contact Suite: Callbacks

Users Guide v5.22

EVOLVE IP, LLC

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Getting Started

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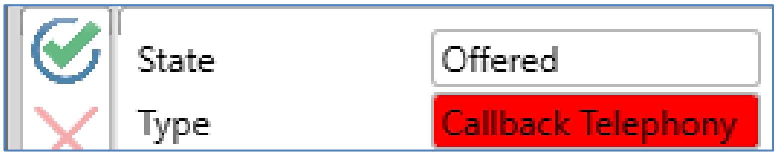
Introduction

Agent Callback Process

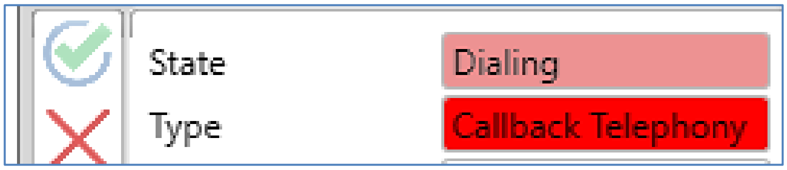
When the callback first presents to an agent, it will be in an **Offered** interaction state.



State: Offered
Type: Callback Telephony

After accepting the callback, the interaction state will update to **Dialing**. ECS will now begin dialing out to the requested callback number.

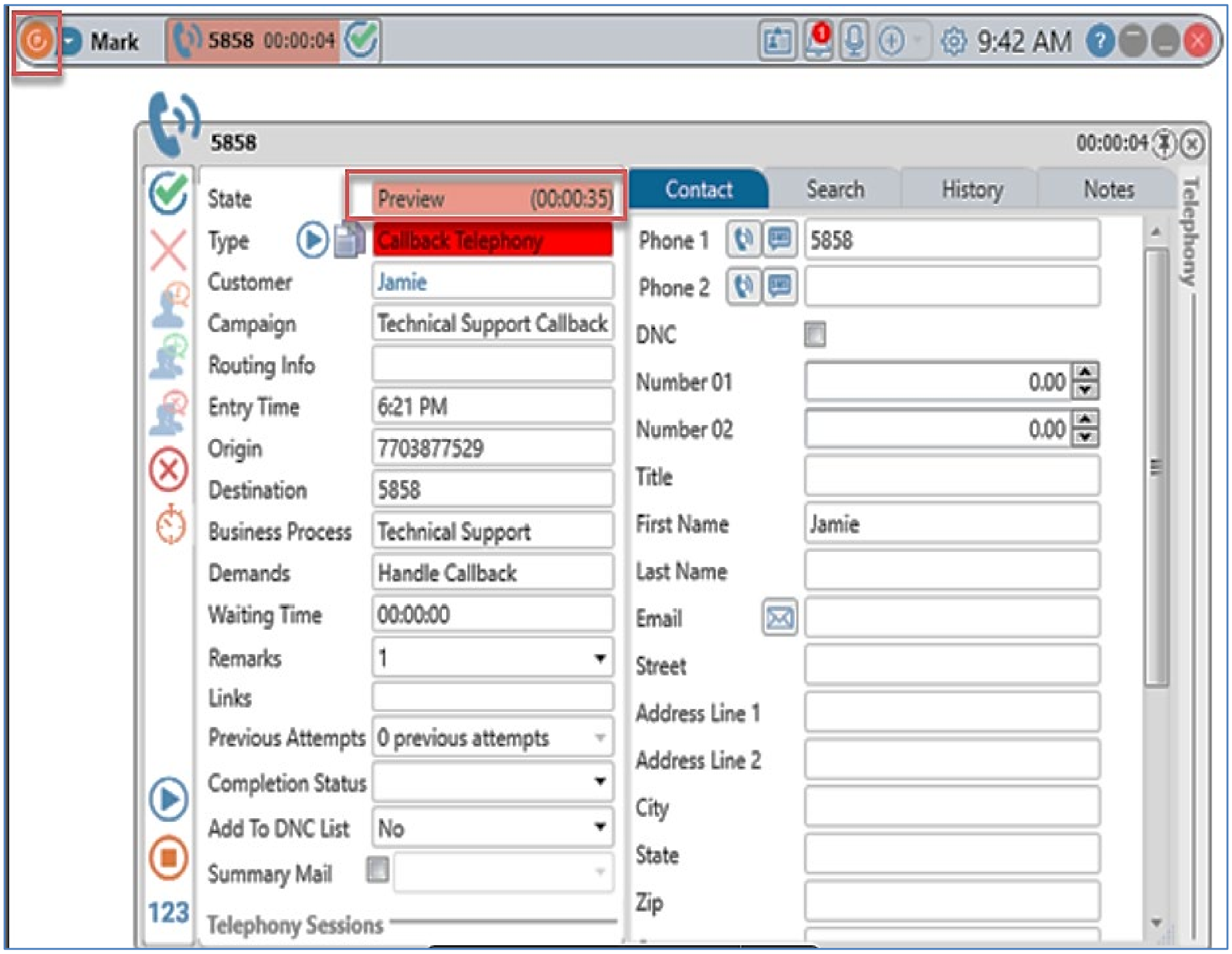
- When using a Teams or UC-1 endpoint call acceptance must be completed via the specific application popup.



State: Dialing
Type: Callback Telephony

- The callback will dial for 60 seconds (this is configurable within supervisor: Item A Duration For No Answer)

If usage of *Preview* state is configured in Supervisor, the interaction will update to **Preview**. During this time, the Agent can listen to a callback recording and/ or view a callback transcription.


Mark
5858 00:00:04
9:42 AM
5858
00:00:04
Contact
Search
History
Notes
Telephony
123
Routing Info
Links
Completion Status
Telephony Sessions
Phone 2
Title
Last Name
Email
Street
Address Line 1
Address Line 2
City
State
Zip

State: Preview (00:00:35)
Type: Callback Telephony
Customer: Jamie
Campaign: Technical Support Callback
Entry Time: 6:21 PM
Origin: 7703877529
Destination: 5858
Business Process: Technical Support
Demands: Handle Callback
Waiting Time: 00:00:00
Remarks: 1
Previous Attempts: 0 previous attempts
Add To DNC List: No
Summary Mail: ☐
Phone 1: 5858
DNC: ☐
Number 01: 0.00
Number 02: 0.00
First Name: Jamie

The Preview status option and allowed Preview time is in Supervisor in the Callback Timing tab under Max Preview Time Mode and Max Preview Time.

Max Preview Time Mode

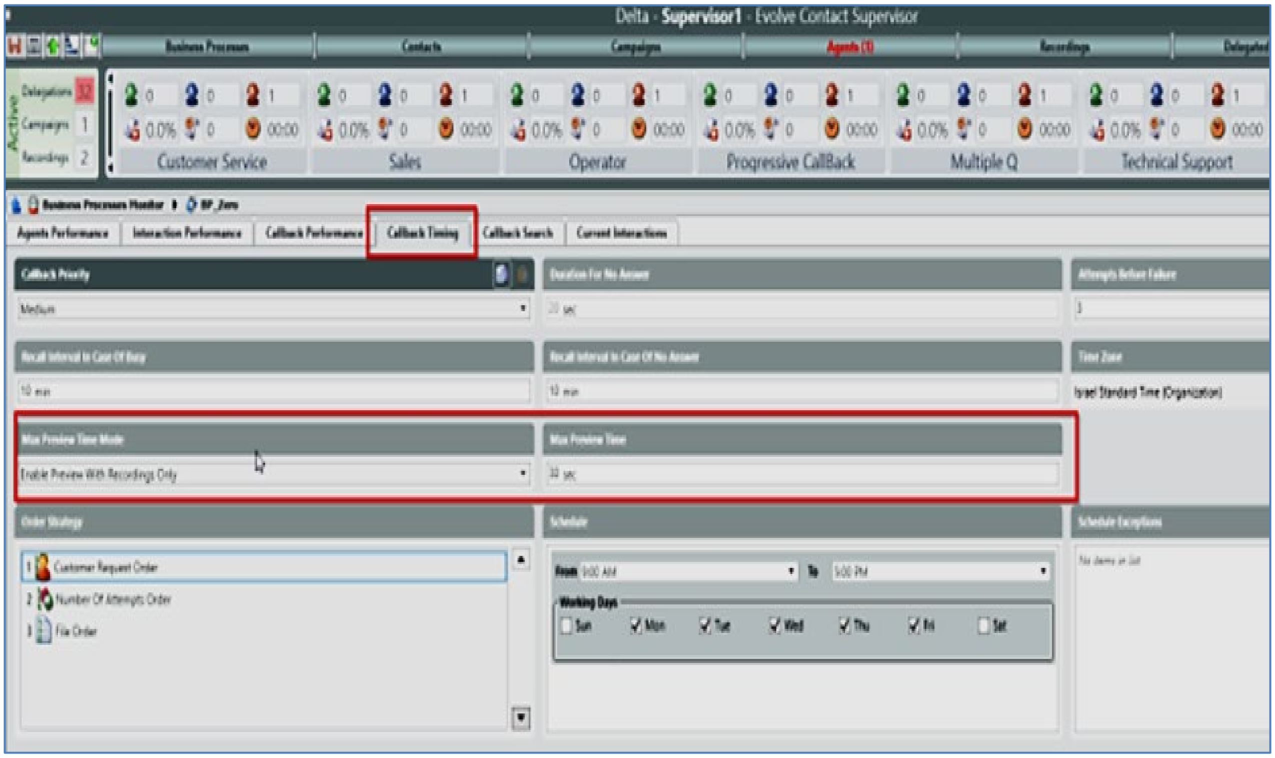
- Enable Preview with Recording- Default setting.

The Preview status will only be used for callbacks when there is a recording. After the callback offer is accepted, the Agent status changes to Preview (or "Busy", if applicable). If there is no recording, the callback begins after the callback offer is accepted.

- Disable Preview- The Preview status is never used for callbacks with or without a callback recording. When this option is set, callback recorded information is never presented. The callback begins after the callback offer is accepted.
- Enable Preview- The Preview status is always used for callbacks with or without a callback recording. After the callback offer is accepted, the Agent status changes to Preview (or "Busy", if applicable).

Max Preview Time

- The maximum amount of time an Agent has to listen to a callback recording.


Delta - Supervisor1 - Evolve Contact Supervisor
Business Processes
Contacts
Campaigns
Agents (1)
Recordings
Delegated
Customer Service
Sales
Operator
Progressive CallBack
Multiple Q
Technical Support
Business Processes Monitor
BP_Zero
Agents Performance
Interaction Performance
Callback Performance
Callback Timing
Callback Search
Current Interactions
Callback Priority
Max Preview Time Mode
Max Preview Time
Order Strategy
Schedule
Schedule Exceptions

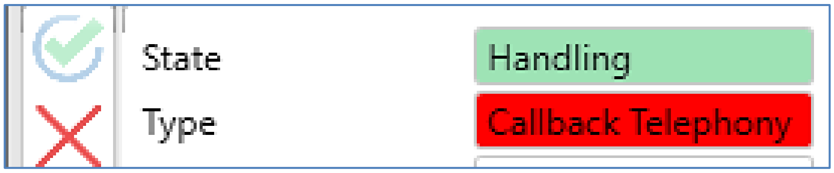
Max Preview Time Mode: Enable Preview With Recordings Only

Time Zone: Israel Standard Time (Organization)

1 Customer Request Order
2 Number Of Attempts Order
3 File Order

Working Days: ☐ Sun ☑ Mon ☑ Tue ☑ Wed ☑ Thu ☑ Fri ☐ Sat

If a voicemail box is reached, the interaction state will change to **Handling**.



State Handling
Type Callback Telephony

Agents can modify the interaction completion status to either keep the callback in queue or remove it entirely.

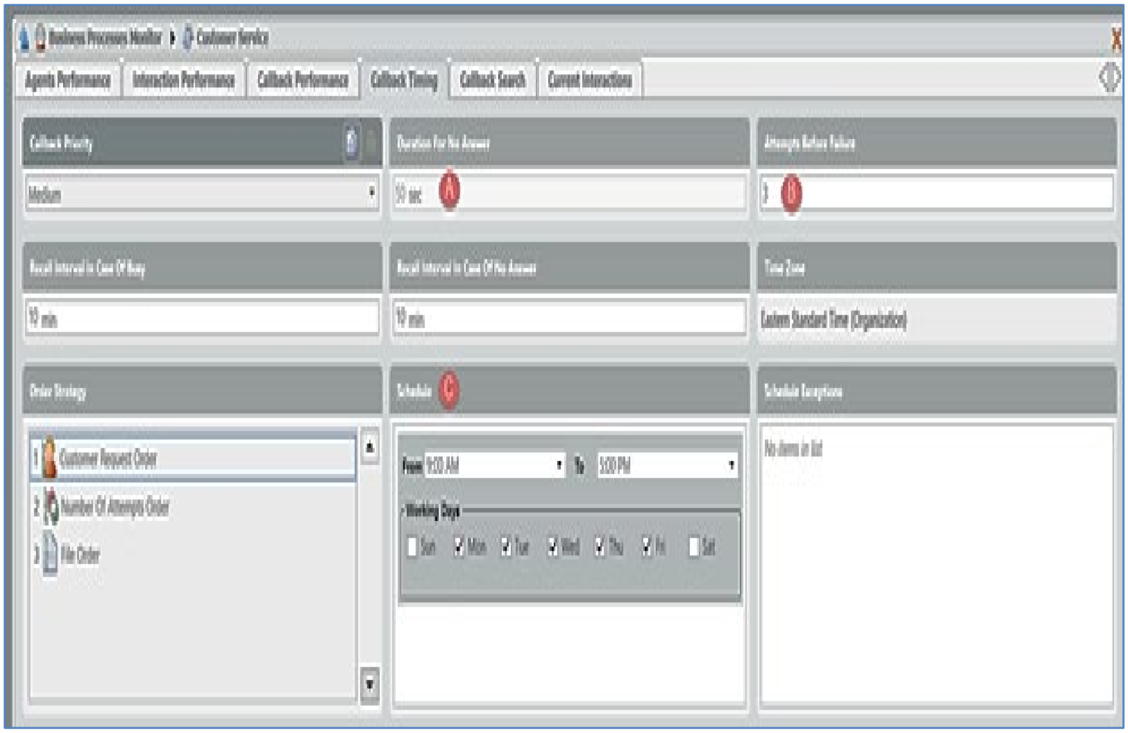
Remove from queue (after leaving a voicemail):

- Ensure the interaction completion status is set to **Handled**. This will remove the callback from queue after leaving the voicemail, the agent can now end the interaction via the Red "X".

Keep in queue:

- If the agent should hang up during the voicemail greeting, they can change the interaction completion status to **Answering Machine**.
- This will increment the *Attempts* counter by 1 for that callback interaction.

- Once an *Attempts Before Failure* of 3 has been reached the interaction will automatically be removed from queue. (This is configurable within supervisor: Item B Attempts Before Failure)
- After accepting the interaction, if 60 seconds have passed and a voicemail box has yet to be reached the interaction will automatically tag itself as completion status **No Answer**.
- This completion status will automatically increment the *Attempts* by 1.
- Once an *Attempts Before Failure* of 3 has been reached the interaction will automatically be removed from queue.



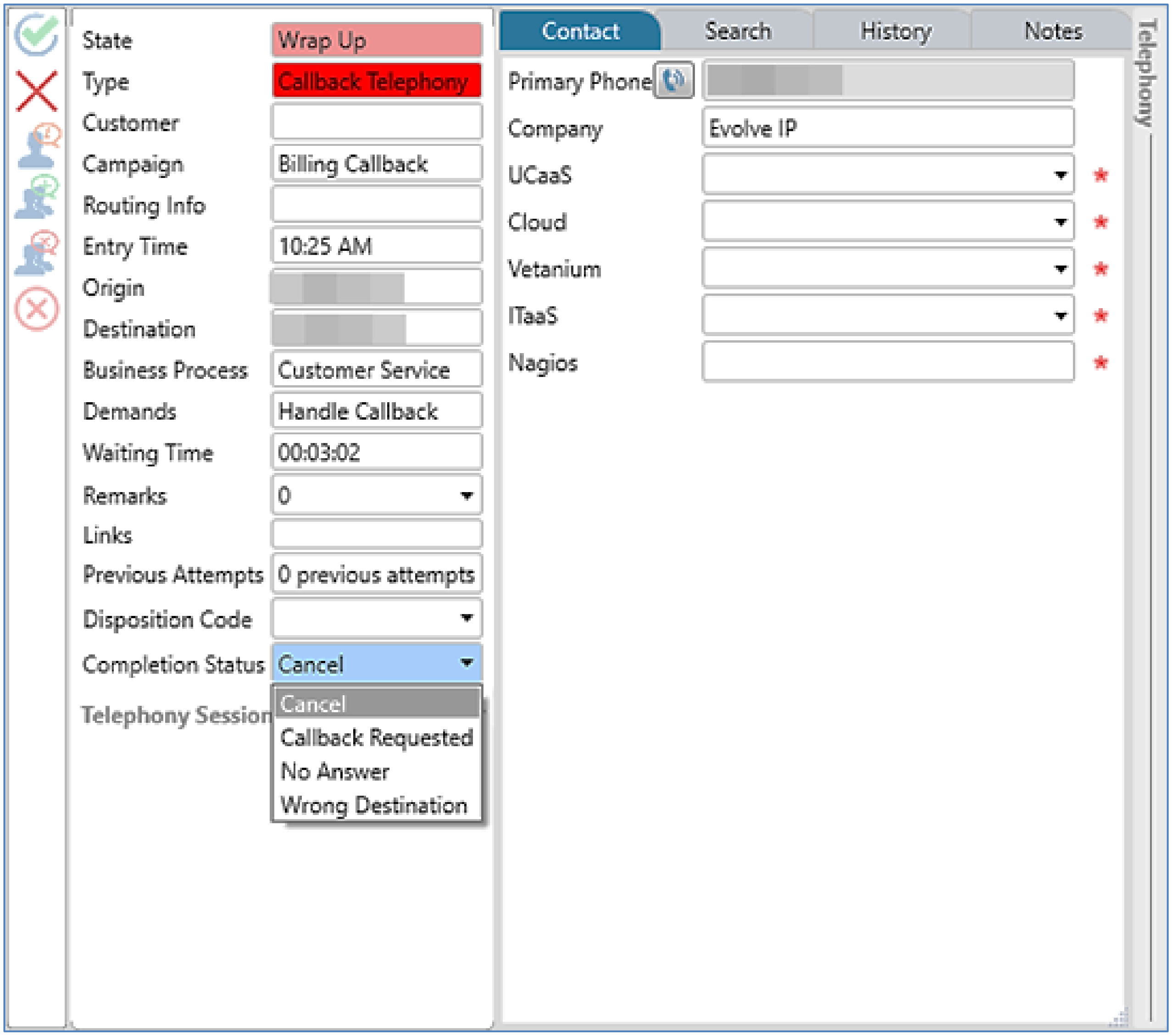
Callback Completion Status

When a callback is accepted and is still in the dialing process it can be cancelled by the agent by selecting the red "X" icon.

The completion status in this scenario will reflect **Cancel** by default.

- **Cancel**: Will re-queue the callback with **no increment to Attempts**.
- **Callback Requested**: Should not be used unless re-scheduling the callback for a particular agent & date/time.
- **No Answer**: Will re-queue the callback and **increment Attempts by 1**.
- **Wrong Destination**: Will remove the callback from queue.

If the callback is unanswered in the time indicated within the *Duration For No Answer*, it will have the same options as above except for "Cancel".



State: Wrap Up
Type: Callback Telephony
Customer:
Campaign: Billing Callback
Routing Info:
Entry Time: 10:25 AM
Origin: [redacted]
Destination: [redacted]
Business Process: Customer Service
Demands: Handle Callback
Waiting Time: 00:03:02
Remarks: 0
Links:
Previous Attempts: 0 previous attempts
Disposition Code:
Completion Status: Cancel
Telephony Session

- Cancel
- Callback Requested
- No Answer
- Wrong Destination

Primary Phone: [redacted]
Company: Evolve IP
UCaaS: *
Cloud: *
Vetanium: *
ITaaS: *
Nagios: *

Supervisor Callback Monitoring

Monitoring Columns

Within supervisor the following columns will provide more insight into your contact center callback. Each metric below is provided at a Business Process level.

- **CLBK Stat**: The current routing status for Callbacks.
- **Active**: The define callback schedule is currently Open.
- **Off Schedule HRS**: The define callback schedule is currently Closed.

- **Stopped**: Callbacks have been manually stopped via right-click menu on Business Process.
- **Proc**: The total amount of callbacks processed during the current shift. This includes both callbacks which succeeded and failed.
- **Clbk To Be Proc**: The total amount of callbacks waiting to be processed. These records can be seen in the "Callback Search" tab of a Business Process.
- **Clbk Avg Time**: The average handle time of callbacks.
- **Clbk Purged**: The total amount of callbacks which have been purged during the current shift.
- **% Clbk Reached**: The percentage of callbacks where a customer was reached.
- **% Clbk Fail**: The percentage of callbacks where a customer was not reached.

Business Process Settings

Selecting a Business Process allows access to the following callback related tabs:

- Callback Performance
- Provides a snapshot view of the column's metrics referenced above.
- Callback Timing
- Provides access to callback management.
- Duration For No Answer
- The defined maximum dialing time until live answer/voicemail pickup.
- Attempts Before Failure
- The maximum amount of attempts a callback is allotted before defining as a failed callback.
- Recall Intervals
- The period in which a callback will return to queue after each attempt.
- Schedule
- The Callback schedule dictates when callbacks will be processed.
- Active
- Off Schedule HRS
- Max Preview Time
- The mode when Preview time is used.

- Enable Preview - Preview status only used for callbacks when there is a callback recording.
- Disable Preview - Preview status is never used for callbacks.
- Enable Preview - Preview status is always used for callbacks.
- Callback Search
- Displays the current listing of callbacks to be processed. If there is a callback recording associated to the pending callback, the audio and transcription are presented.
- Number of Attempts
- Displays the number of attempts the callback has used.
- Interaction Location
- **Pending**: The callback is not yet in queue. Callbacks in pending state can be manually sent to queue or purged via right-click menu.
- **HandlingByBusinessProcess**: The callback is currently waiting in queue to be offered to an agent. This callback can be viewed within the Current Interactions tab of the Business Process.
- **HandlingByAgent**: The callback is currently being handled by an agent. This callback can be viewed within the Current Interactions tab of the Business Process.

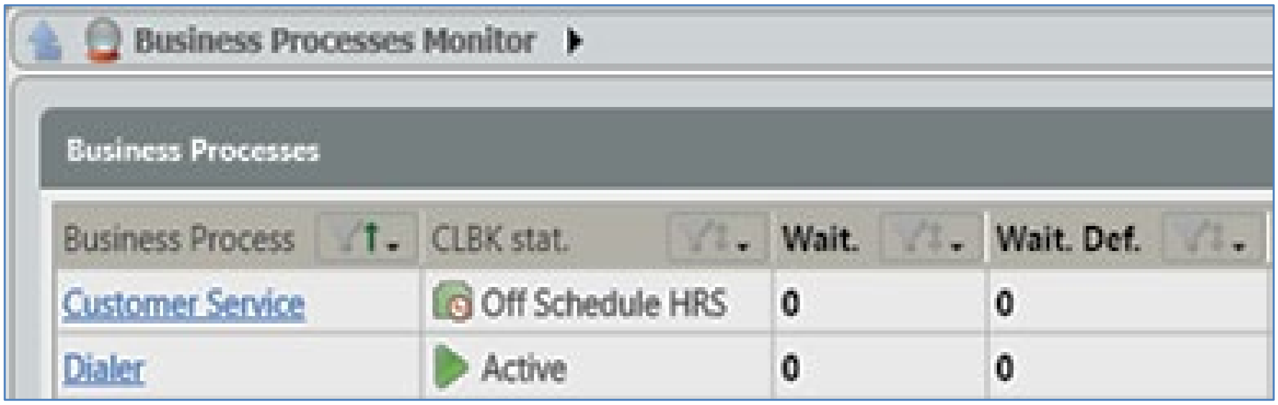
Callback Reporting

The recommended callback report is the **6.04 Completed Callback Interaction**. This report will display the following:

- The callback end interaction state
- The original callback entrance time
- The last attempt time for the callback
- The total amount of attempts, including:
- Attempt time
- Agent Name
- Attempt State
- The callback recording audio and transcription

Attempt state of **Aborted** indicates the callback was removed from queue due to the configured callback schedule. (*This is configurable within supervisor: Item C Schedule*).

Business processes which are **Off Schedule** will reflect as such in the Business Process Monitor.


Business Processes Monitor
Business Processes

Business Process	CLBK stat.	Wait.	Wait. Def.
Customer Service	Off Schedule HRS	0	0
Dialer	Active	0	0

Additional Callback Resources

- ECS Supervisor - Send Callback to Queue Command

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