

***Strata*[®]CS**
Communication Server

**Smart Dialer Add-on
User Guide**

Publication Information

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Introduction

This guide describes how to install, set up, run and debug the Smart Dialer Add-on features for the Strata Communication Server (CS).

Conventions

Conventions	Description
Note	Elaborates specific items or references other information. Within some tables, general notes apply to the entire table and numbered notes apply to specific items.
Important!	Calls attention to important instructions or information.
➤	Denotes a procedure.
>	Denotes a sequence of computer menu or screen selections. For example: Choose Start > Programs > Call Center Scoreboard.

Related Documents/Media

Note Some documents listed here may appear in different versions on the CD-ROM, FYI, or in print. To find the most current version, check the version/date in the Publication Information on the back of the document's title page.

The following companion documentation is available:

- Strata CS Quick Reference Guide
- Strata CS Quick Reference Card
- Strata CS Digital Telephone User Guide
- Strata CS Analog Telephone User Guide
- Strata CS Library CD-ROM

Smart Dialer

The Smart Dialer is a Strata CS Add-on Solution. It will automate outbound dialing for agents. Phone numbers are taken directly from Goldmine® 5.X, Front Office 2000®, or can be supplied from your own data source. Perfect for any outbound calling campaign, the Smart Dialer will enhance the productivity of call centers.

Components

The Smart Dialer has two components: the Administrator and the Monitor.

The Administrator is used to set up the Smart Dialer for use and includes the ability to create shifts for your agents, configure your data source, and set up other details related to the operation of the Smart Dialer. The Administrator can be run on the Strata CS server or on any networked machine, allowing remote administration of the Smart Dialer.

The Monitor is used to start and stop the Smart Dialer, as well as display the current activity of the system on screen. Details related to logging and debugging the system can be set from the Monitor. The Monitor must be run on the Strata CS Server.

Installation

Important! *Installation requires a restart of the Strata CS Server, so only attempt this after-hours when you can shut the server down without interrupting users. Make sure to shut down the Strata CS Server before beginning installation.*

Note Application software for this add-on application must be downloaded from the Toshiba FYI site at <http://fyi/techsupport/software/stratasystem/cs>. You must be CS certified to access this site. To obtain an activation license, contact your Toshiba Customer Service Representative.

The Smart Dialer requires Strata CS 4.0.

Note If you are upgrading from the 3.5 version of the Smart Dialer and want to save your old configuration settings, back up the Dialer.mdb file. Once you are finished installing the 4.0 Smart Dialer, replace the installed Dialer.mdb file with your old 3.5 Dialer.mdb file.

Step 1: Install the TeleVantage SDK

The Smart Dialer requires the TeleVantage SDK be installed on the Strata CS 4.0 server.

1. Run the TVSDK.exe program located in \Server on the TeleVantage CD-ROM.
2. Follow the instructions in the TeleVantage SDK Setup window.

Important! *Steps 2 and 3 assume you have successfully downloaded the Smart Dialer. Download instructions can be found in the Smart Dialer packaging.*

Step 2: Install Smart Dialer on Strata CS Server

The Server installation installs both the Smart Dialer Administrator and the Smart Dialer Monitor.

1. Unzip DialerServer.zip to a temporary location.
2. Run setup.exe from the location from which the DialerServer.zip was unzipped.
3. Follow the instructions in the Smart Dialer Setup window.
4. (Optional) Create desktop shortcuts to the Smart Dialer Administrator (DialerAdmin.exe) and the Smart Dialer Monitor (Dialer.exe). The Smart Dialer Administrator and Smart Dialer Monitor can also be started from Start > Programs > TeleVantage Smart Dialer.

Step 3: Install Smart Dialer on Client PC (Optional)

The Client installation installs only the Smart Dialer Administrator. It can be installed on any machine networked to the Strata CS Server, and enables remote management of the system for setting up agents, schedules, your data source and system settings. You do not need to install the Smart Dialer Client on the Strata CS Server since the Smart Dialer Server installation installs the Smart Dialer Administrator.

1. Unzip DialerClient.zip to a temporary location.
2. Run setup.exe from the location DialerClient.zip was unzipped to.
3. Follow the instructions in the Smart Dialer Client Setup window.
4. (Optional) Create a desktop shortcut to the Smart Dialer Administrator (DialerAdmin.exe). The Smart Dialer Administrator can also be started from Start > Programs > TeleVantage Smart Dialer > Smart Dialer Administrator.

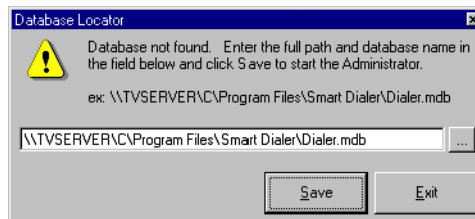
Setup

Once the Smart Dialer has been successfully installed, you are ready to configure the system for use. All setup can be done from the Smart Dialer Administrator.

1. Start the Administrator by choosing Start > Programs > TeleVantage Smart Dialer > Smart Dialer Administrator.

Note The first time the Smart Dialer Administrator is run on a client machine, the screen at the right displays.

2. Fill in the full path to the file Dialer.mdb located on your Strata CS Server, or click the browse button to locate the file on the network.
3. Once the full path is listed, click Save. The Smart Dialer Administrator starts.



Step 1: System Configuration

There are a number of system settings that are set in the Configuration view of the Administrator.

- To access the Configuration View, click on the Configuration icon on the left hand side of the Administrator. The following two tabs are displayed: General and GoldMine (shown right).
- Enter the following system information on the General tab:

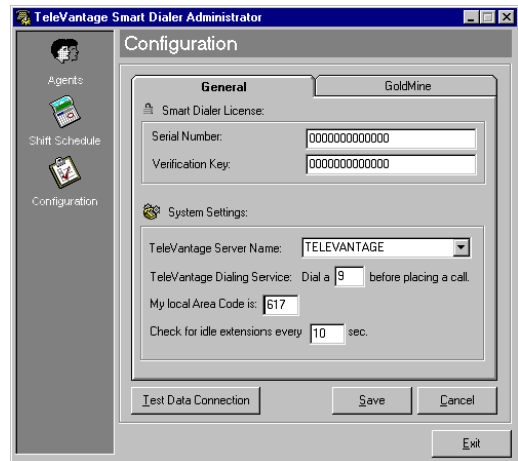
- **Serial Number.** The license serial number for the Smart Dialer. You can find the license serial number on the card included in the Smart Dialer packaging.

Note The serial number authorizes you to run one copy of the Smart Dialer.

- **Verification Key.** The verification key for the Smart Dialer. You can find the verification key on the card included in the Smart Dialer packaging.
- **Strata CS Server Name.** Choose the name of your Strata CS Server from the list provided. If you do not see the name of your server in the list, make sure your network settings are correct.
- **Strata CS Dialing Service.** The access code of a Phone Number dialing service on the Strata CS server to allow the Smart Dialer to place outbound calls.
- **Local Area Code.** The local area code for the location where the Smart Dialer is installed. This area code is appended to all leads from Goldmine that are only seven digits long.

Note It is not recommended setting the Idle Extension Interval for less than 10 seconds.

- When all data is entered correctly, click Save.



Step 2: Configure Database

The Smart Dialer can be configured to work with Goldmine 5.0, FrontOffice 2000 or your own data source. If working with your own data source, you will need to manually populate the Microsoft® Access® database, Dialer.mdb, that is supplied with the Smart Dialer.

To populate Dialer.mdb you need to add data into the Phone Numbers table. The PhoneNumbers table contains two fields: ContactName and PhoneNumber. The *ContactName* field is optional and can contain any text, such as the first and last name of the contact being called. The *ContactName* field is attached to the call and can be viewed in the Call Monitor's "Custom Data" column.

The *PhoneNumber* field is required and must be filled with digits representing the phone number. The phone number digits should be entered exactly as they would be dialed from a station after hitting a dialing service. Do not place any spaces, commas, dashes or other characters in the string. For example, enter a number as "16175551212". The Smart Dialer will pull phone numbers from Dialer.mdb. Once a call is placed, the phone number entry is deleted from Dialer.mdb.

If working with Goldmine 5.0 or FrontOffice 2000, the Smart Dialer can be configured to retrieve leads from the Goldmine database. Leads are retrieved from the database based on criteria you specify in the Smart Dialer Administrator.

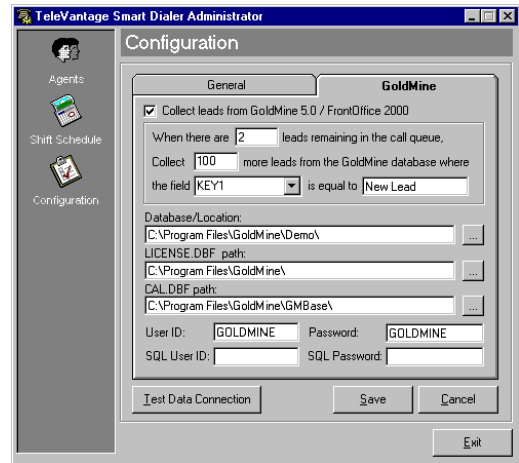
Specifically, you choose a database field and specify the value it should contain for the record to be retrieved from the database. Leads are retrieved from the Goldmine database and deposited into a Microsoft Access database supplied with the Smart Dialer, Dialer.mdb. The Smart Dialer pulls numbers from Dialer.mdb to place calls. Once a call is placed to a lead, the phone number entry is deleted from Dialer.mdb.

Periodically, the Smart Dialer will access the Goldmine database to access more leads. You configure how often leads should be retrieved and how many leads should be retrieved at once.

Whether you are working with your own data source or with Goldmine, you will need to configure the database settings for the Smart Dialer.

► **To configure the database settings**

1. Open the Administrator by choosing Start > Programs > TeleVantage Smart Dialer > Smart Dialer Administrator.
2. Click on the Configuration icon on the left-hand side and then select the Goldmine tab (shown right).



► **To manually populate the Microsoft Access Dialer.mdb database with your own data**

1. Do not check the Collect leads from Goldmine 5.0/FrontOffice 2000 checkbox.
2. Click Save.

► **To retrieve your list of phone numbers directly from Goldmine 5.0/FrontOffice 2000**

1. Select the Collect leads from Goldmine 5.0/FrontOffice 2000 checkbox.
2. Specify when to collect leads from Goldmine by indicating how many leads remain in the database at the time of collection. For example, entering a 2 here will cause Smart Dialer to collect more leads when it only has two more numbers left to call.
3. Specify how many leads to collect from Goldmine at a time. For example, entering a 100 here will cause Smart Dialer to attempt to collect 100 leads from Goldmine.
4. Choose the field and specify the value you will use for the search criteria for new leads. You must select one of the pre-defined Goldmine fields listed here. For example, if you want to collect leads when the contact in GoldMine has it's first

custom data field equal to “New Lead” you would select USERDEF01 from the list and set the value equal to “New Lead.”

Note It is recommended that you use a User Defined Field (USERDEF01-USERDEF08) or the Account Type (KEY1) field with a custom setting “New Lead.”

5. Database/Location. This field specifies the location of the GoldMine database from which you wish to collect leads. With GoldMine, you may be using a dBase backend or a SQL backend.

If you are using a dBase backend, this field will specify the full path to the file CONTACT1.DBF on your GoldMine server (ex. “C:\Program Files\GoldMine\Demo”).

If you do not know where this file is located, open GoldMine and select File > Open Database. You will see a list of valid databases. Find the Database you wish to use and look in the Database/Location column. This will give you the path to the CONTACT1.DBF file as it is located on your server. You can then use the file browse button to search your network for the file CONTACT1.DBF.

Note GoldMine displays where the file is located on it's server. Unless your Strata CS Server and GoldMine Server are the same machine, you will need to fill in a full DNS path to the file (ex. “C:\Program Files\GoldMine\Demo\” becomes \\GM_SERVER\C\Program Files\GoldMine\Demo\). Also, you must have this drive shared on your GoldMine Server. To check this, make sure you can gain access to the file using the Browse button.

If you are using a SQL backend, the Database/Location field will specify the SQL database name for the database you wish to use. If you do not know the name of your SQL database, open GoldMine and File > Open Database. You will see a list of valid GoldMine databases. Find the Database you wish to use and look in the Database/Location column. Enter into the Database/Location field exactly what is listed in this column (ex. “MSSQL: GoldMine_Sales: dbo:”).

6. LICENSE.DBF Path. This field specifies where the GoldMine license file is located. This needs to be filled with the full path to the file LICENSE.DBF on your GoldMine Server. This file should be located in the \GoldMine\ directory on your server (ex. “\\GM_Server\C\Program Files\GoldMine\”). You can use the file browse button to search your network for the file LICENSE.DBF.

Note You must have these folders shared on your GoldMine Server for this to work. Make sure you can gain access to the file using the Browse button.

7. CAL.DBF path. This field specifies where the GoldMine file, CAL.DBF, is located. Enter the full path to the file CAL.DBF on your GoldMine Server. This should be located right in the \GMBase\ directory on your Goldmine server (ex. "\\GM_Server\C\Program Files\GoldMine\GMBase\"). You can use the file browse button to search your network for the file CAL.DBF.

Note You must have these folders shared on your GoldMine Server for this to work. Make sure you can gain access to the file using the Browse button.

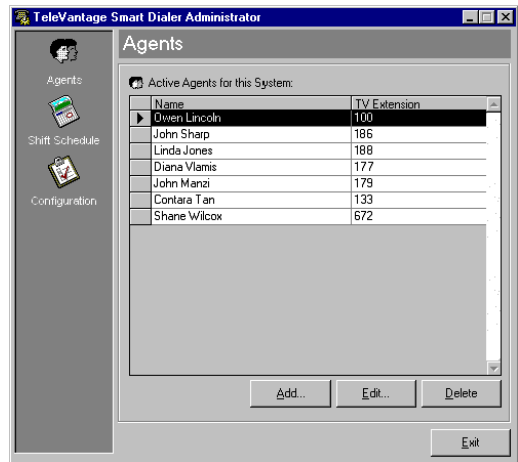
8. User ID. This field specifies the User ID that you use to login to GoldMine. Make sure this user has Admin rights in GoldMine. User ID must be entered with all caps (ex. "ADMIN").
9. Password. This field specifies the Password that you use to login to Goldmine. The password must be entered with all caps (ex. "PASSWORD").
10. SQL User ID. If you are using a SQL backend, this field must be filled in with the SQL User ID (ex. "sqladmin").
11. SQL Password. If you are using a SQL backend, this field must be filled in with the SQL Password (ex. "password").
12. Test Data Connection. When you have filled in all the fields, test your GoldMine connection by clicking the Test Data Connection button at the bottom of the screen. If everything is set up correctly, you will see the message "Data connection successful". If there is a problem, you will see one of the following errors:
 - BDE already loaded. Make sure you do not have multiple copies of the Smart Dialer running. Check the Task Manager and kill any copies of DialerAdmin.EXE you find.
 - BDE Failed to load. Make sure you are not running a copy of GoldMine on your desktop. GoldMine will not allow you to run a copy of GoldMine and test the Database connection at the same time.
 - Cannot find LICENCE.DBF. Make sure the path to License.dbf is correct and points to the copy of the file on the GoldMine server. Make sure the file is on a shared drive.
 - Cannot load LICENCE.DBF. Your Licence.dbf file may be corrupt or you may not have correct licences to run GoldMine over a network. Make sure you have an enterprise version of GoldMine if you are attempting to connect to a Licence.dbf over a network.

- Invalid GoldMine User ID / Password. Make sure the GoldMine User ID and Password are correct and that they are entered in all caps. Try running a copy of GoldMine and using the data you entered to log in.
 - Cannot find CAL.DBF. Make sure the path to CAL.DBF is correct and points to the copy of the file on the GoldMine server. Make sure the file is on a shared drive.
 - Cannot find Database. Make sure the Database/Location field either contains the path to CONTACT1.DBF (for a dBase backend) or the SQL Database name (for a SQL backend). Follow the directions above to check the Database/Location column in Goldmine and ensure the Database/Location field in the Smart Dialer Administrator contains the exact same text.
13. Click Save when all information is entered correctly.

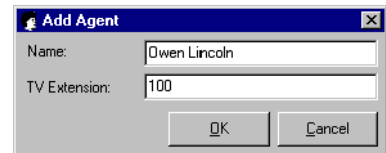
Step 3: Set up Agent(s)

Use the Agents view in the Smart Dialer Administrator to create the listing of agents that will receive calls.

1. Start the Administrator by choosing Start > Programs > TeleVantage Smart Dialer > Smart Dialer Administrator.
2. To access the Agents view, click on the Agents icon on the left hand side of the Administrator (shown right).



3. Click Add. The Add Agent screen displays (shown right)
4. Enter in the following information:
 - Name. The name of the agent. Note that this is a description only and does not need to match a Strata CS user name.
 - TV Extension. The extension of the user within Strata CS (ex. 100). The Smart Dialer will monitor this agent based on the extension number entered.
5. Click OK when finished.
6. Repeat Steps 1~3 for as many agents as you wish to add.

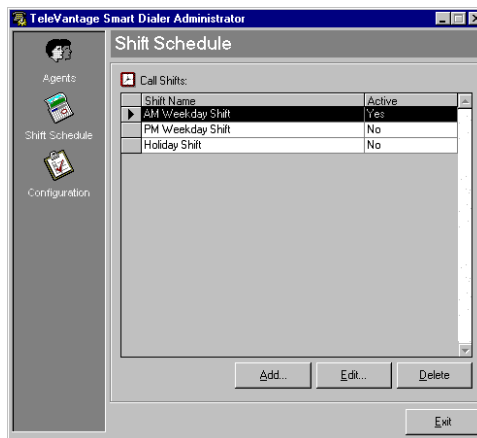


Step 4: Set up Shift(s)

The Shift Schedule view enables you to create a schedule for agents to receive outbound calls. There are two steps to creating a shift:

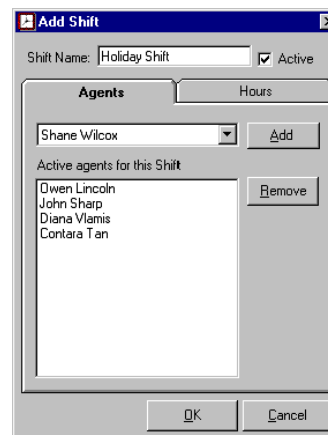
- Adding agents to the shift
 - Defining the days and hours of coverage.
1. Start the Administrator by choosing Start > Programs > TeleVantage Smart Dialer > Smart Dialer Administrator.
 2. To access the Shift Schedule view, click on the Shift Schedule icon on the left-hand side of the Administrator.

The Shift Schedule view (shown right) enables you manage shifts.



3. Click Add at the bottom of the screen
The Add Shift screen displays (shown right).
4. Enter a descriptive name for the shift in the *Shift Name* field.
5. Choose whether the shift is active or not active by selecting the Active checkbox. Only Active shifts are used by the Smart Dialer. Leave the Active checkbox unchecked to create shifts that will be used at a later time.

Note Utilize the Active switch to create shifts that handle weeks of coverage. Create a new shift and leave the Active checkbox unchecked to create shifts that will be used in the future. Or, change



the status of an Active shift to inactive by unchecking the Active checkbox to save a shift that will be used again at a later time.

6. Add agents to the shift by selecting the Agents tab.
7. Select the agent name from the list and click Add.
8. Continue adding agents until all the agents in the shift are listed.
9. Specify the shift days and hours by selecting the Hours tab (shown right).
10. Within the Hours view, specify the days this shift will cover, as well as the hours in each day. The hours for each day need to be entered in the format “HH:MM AM/PM - HH:MM AM/PM”. For example: “9:00 AM - 3:00 PM”.
11. Click OK when done creating or modifying the shift.

Note More than one shift can be active at the same time since each shift may cover different hours. However, the Smart Dialer handles only a single active shift for the same hours. If more than one shift is active for the same day and hours, only the first shift found by the Smart Dialer will be used.

Screen Pop Setup

If you are integrating the Smart Dialer with Goldmine 5.0 or FrontOffice 2000, a screen pop can be done on the agent's machine to the record in the Goldmine database that the call is placed for. To set this up, you will need to install the Strata CS Contact Manager Assistant on each agent's machine as well as the Strata CS TAPI Service Provider.

1. Install the TAPI Service Provider by following the instructions in your *Strata CS 4.0 Installation and Maintenance Manual*. Make sure to complete all steps related to installing the TAPI Service Provider, configuring the TAPI Service Provider and configuring GoldMine for use with the TAPI Service Provider.
2. Install the Strata CS Contact Manager Assistant from your TeleVantage 4.0 CD-ROM and follow the instructions to set it up for GoldMine.

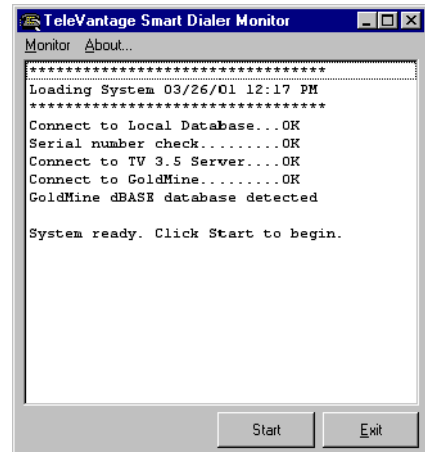
Running the Smart Dialer

► To start the Smart Dialer

1. To run the Smart Dialer, start the Smart Dialer Monitor by choosing Start > Programs > TeleVantage Smart Dialer > Smart Dialer Monitor.
2. As soon as the Monitor is started, several system messages are logged (screen shown right).

If there is a problem connecting to the database or with the licensing, it will be noted in the Monitor screen. If the Monitor does not detect any problems, you will see the message “System ready. Click Start to begin.”

3. Click the Start button or select the Start option from the Monitor pulldown.



Note As soon as the Smart Dialer is started, the database will be checked and, if necessary, leads will be retrieved (Goldmine 5.0/Front Office 2000 only). Shifts will also be checked to find out what shift is active at this time. If leads are in the Dialer.mdb and agents in an Active shift are available, calls will be placed and transferred to the available agents.

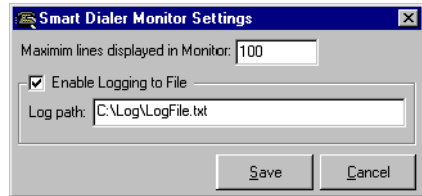
An agent must be logged into Strata CS using their personal extension to receive calls from the Smart Dialer. Since the Smart Dialer uses the extension specified for the agent in the Smart Dialer Administrator to monitor the status of the agent, the status will not be monitored if the agent is logged in under another extension. For example, if the agent is logged into a queue, the Smart Dialer will not monitor them and they will not receive calls.

An agent can utilize the Do Not Disturb personal status to stop calls from being placed for them. The Smart Dialer will only place calls for agents that are available (ex. not in Do Not Disturb mode).

All activity of the Smart Dialer will be logged on screen in the Monitor. Use the Monitor to simply view activity of the Smart Dialer or to debug problems with the system. Any errors found will be noted on screen.

► To store the log activity displayed on the screen in a text file

1. This setting is available by selecting Monitor > Monitor Settings...
2. To log the activity to a file, select the Enable Logging to File setting. If this option is selected, also specify the file name and path to the log file. The path must already exist for a log file to be created. The log file will be continually appended to as the Smart Dialer is running.



Note Use the log file option when debugging the application only.

► To configure how many lines will be displayed on screen

- The Maximum Lines setting defines how many lines of system activity will be displayed in the Monitor. The list box will wrap so that the oldest item will be deleted and the most recent will be added to the bottom. The maximum value of this setting is 1000; values higher than 1000 can negatively affect system performance. A value of 100 is recommended.

► To clear the contents of the screen

- Choose Monitor > Clear List. This will clear the Monitor of all past activity. New activity is logged as usual.

Debugging

If the Strata CS Smart Dialer is not working as expected, here are some pointers to help you determine the source of the problem.

First, review this installation checklist. Did you remember to install all the necessary components?

- You are running Strata CS 4.0 Server.
- TeleVantage SDK is installed.
- TeleVantage Smart Dialer server component is installed.

Was the necessary setup of the Smart Dialer completed?

- All Configuration settings in the Smart Dialer Administrator are set, including Strata CS Server name, dialing service and license information.
- At least one active shift is setup for the mailbox.
- Agent extensions are correct.
- Hours of coverage are set appropriately.
- If using Goldmine 5.0/Front Office 2000, the database connection was confirmed by clicking the Test Data Connection button in the Smart Dialer Administrator Configuration view.

If all seems correct with the installation and setup, don't forget to check the following:

- Are any error messages displayed in the Monitor?

If the Smart Dialer detects any errors while running, the errors will be logged to the Monitor screen. This is the best place to check for problems and will likely point you to the source of the problem.

When starting up the Monitor for the first time, the following error messages might appear. Make sure you have supplied all necessary data in the Configuration section of the Smart Dialer Administrator before attempting to start the Monitor.

- Can't Connect to local database. The Smart Dialer Monitor cannot find the Microsoft Access database, Dialer.mdb. Make sure Dialer.mdb is located in the same folder on the Strata CS Server as Dialer.exe.

- Serial number is invalid. Either your serial number or verification key is invalid. Open up the Smart Dialer Administrator and make sure you have entered these correctly. The serial number and verification key are included in the Smart Dialer packaging.
- This is not a Strata CS 4.0 Server. The Smart Dialer checks to make sure you are running a valid Strata CS 4.0 Server. This version of Smart Dialer requires Strata CS 4.0. If you are using Strata CS 4.0 and still see this message, make sure the Smart Dialer Monitor is running on the Strata CS Server itself and that Strata CS is installed correctly.
- Can't connect to [Strata CS Server name]. The Smart Dialer cannot find a running Strata CS Server on the machine name you specified in the Configuration settings. Make sure that the Strata CS Server name you entered in the Smart Dialer Administrator is correct and that the Strata CS Server is running.
- Error Loading Goldmine DLL (GoldMine only). The Smart Dialer could not connect to GoldMine based on the settings in the Smart Dialer Administrator. Read the section on Database Configuration and how to use the Test Data Connection button for more information on these errors.

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