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# CHAPTER 6

## Scheduled Callback



Scheduled callback gives callers control over when the callback occurs. This chapter shows you how to configure and use Scheduled Callback. The following topics are covered.

- What is Scheduled Callback? (*page 1*)
- Configuration and Administration (*page 2*)
- Using Scheduled Callback Reports (*page 9*)
- Troubleshooting and Maintenance (*page 10*)

### What is Scheduled Callback?

During peak inbound activity, the APM informs callers of the estimated queue time (ETA) until the next agent will be available, and offers one of several types of ‘callback’. **Scheduled Callback** is one such option. This feature allows the caller to record a message, specify a desired callback time, opt to use their caller ID (ANI) or specify a telephone number of their choice, and hang up. The APM then launches a callback at the time specified by the caller. APM features provide the agent with automated outbound dialing, the caller’s recorded message, an alphanumeric message on the telephone display, and automatic screen “pop” of caller information at the workstation. *See also “ASAP Callback” and “Internet Callback”*

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**NOTE** Each of the 3 callback features – ASAP, Internet, and Scheduled – are independent of each other, and are only available if explicitly installed on your system.

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## Configuration

Callback is configured on the server in the TFB Pilot Parameters form, and in several configuration (.cfg) text files. On the ACD, Callbacks require a dedicated UCD group, as well as CCVs configured to route calls on the desired pilot(s) to the CTI Server.

### Configuring Scheduled Callbacks on CTI Server

Two important components of callback must be configured on CTI Server:

- **Pilot Parameters** – configured in the TFB Pilot Parameters form.
- **Outbound Dialing Parameters** – configured in three different .cfg files in the *tfb\data* directory.

To open the TFB Pilot Parameters form

- Double-click the TFB Configuration icon on the CTI Server desktop.



TFB Configuration

- Click the **Config.** button.



Config

- Click the **Callback Parameters** button



Callback  
Parameters

The TFB Pilot Parameters configuration form opens,

TFB CTI Server

**TFB Pilot Parameters**

Pilot Number: 000000

Name: Default

Start Day: 08:00 End Day: 23:30

No. of Retries: 3

Between: 5

Max. Que Time: 99 Min. Que Time: 120

Rec. Time: 20

Acct. Len.: 0

Pilot Override:

PIVRCode: 0 PIVRInt: 0

Announcement: 4 PCBAAnnNo: 0

Announce Que Position:

Announce ETA:

Use ANI:

Enable Callback:

Enable Scheduled Callback:

Enable Whisper:

Enable Screen Pop:

Agt Disp: Account

Record: 1 of 2

## Defining Scheduled Callback Parameters

In the TFB Pilot Parameters form, Callbacks are configured uniquely by pilot number. You can configure each scenario to offer callbacks only during a certain period of the day. You can also specify minimum and maximum queue times for a callback to be offered, the number of retries, and whether the ANI is used for the callback.

**A caller on a particular pilot is offered Scheduled callback when,**

- CTI Server receives an *IVR Announcement 9* via *Infolink*
  - AND –
- **Enable Scheduled Callback** is selected for that Pilot.
  - AND –
- The call occurs within the times in **Start of Day** and **End of Day** for that pilot.
  - AND –
- The current ETA exceeds **Min. Que Time** for that pilot.

You can set additional preferences for each callback scenario as well, as shown in the following procedure.

To set Scheduled Callback on any Pilot

*In the TFB Pilot Parameters form...*

- 1 Enter the **Pilot Number** to be defined. You can also click the left/right arrow buttons at the bottom of the window to scroll through existing Pilots. The number in this field is the Pilot that will use the current configuration. Any call on a pilot not specified in the configuration will be handled according to the default definition, Pilot Number 000000. Also enter the pilot **Name** (optional).
- 2 Select **Enable Scheduled Callback** to offer a callback at a specific time.
- 3 Enter the Announcement number, or enter '0000' for none, in **Announcement**. This is the *initial* message played when callers on *the selected pilot* are routed to CTI Server. It is typically a "Thanks for calling, all agents are busy..." message. This is followed immediately by Queue/ETA Announcements (if enabled), then by the announcement offering callback.
- 4 Specify the **Start of Day** and **End of Day** for that pilot. Callbacks are *only* offered between the two times specified. These must be in military time format, <hh:mm> (HH=0-23, mm=0-59).
- 5 Specify the **Min. Que Time** for that pilot in *seconds*. Callback are offered (if enabled) only when the current ETA exceeds this value.
- 6 Specify the **Max. Que Time** for that pilot in *minutes*. When the current ETA exceeds this, callers are *forced* to accept a callback. (99 minutes is the maximum Queue time for NEC's PBX/ACD)

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**IMPORTANT** **Min. Que Time** is specified in *seconds*. **Max. Que Time** is specified in *minutes*.

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- 7 In the **No. of retries** field, specify how many times the system should retry after a failed callback. Specify the interval (in *minutes*) between each retry in the **Between** field.
- 8 Select **Use ANI**, if you want the system to offer a call back using the current ANI (if available). Some callers may not react well to the fact that you have their ANI, so this feature should be used with discretion. Whether or not **Use ANI** is selected, callers are offered the option to enter their preferred callback number from their touchtone keys.
- 9 Select **Announce Que Position** for callers on *the selected pilot* to hear what position they are in the Queue.

**Announce Que Position:**

**Announce ETA:**

Select **Announce ETA** for callers on *the selected pilot* to hear their estimated time to an agent. Both announcements are heard *before* the callback offer. The Queue/ETA Announcement can help callers decide whether to accept the callback, or stay on the line. **More Information** – See *Chapter 2, “Queue/ETA”*

- 10** Select **Enable Whisper** to speak the caller’s account number to agents. Select **Screen Pop** to display caller information in the Agent workstation window when the callback is generated.

*REPEAT THESE STEPS FOR EACH PILOT THAT WILL USE ASAP CALLBACK.*

## Outbound Dialing Configuration

Not all Callback configuration options are related to the pilot. The next step is to edit the three configuration files that determine APM's outbound dialing format. When APM initiates a callback, it uses the information in these files to account for variations in regional phone systems. Edit each as your local requirements dictate:

### Local Long Distance Configuration

<u>File Name</u>	<u>Description</u>
<i>Lld.cfg</i>	This file contains a list of area codes and exchanges that <i>don't</i> require a '1' prefix when dialed. If a callback number has an area code/exchange combination that appears in this list, APM omits the standard '1' prefix when dialing.

To edit, click **Config. | Local Long Distance** in the CTI Server window, or edit `tfb/data/lld.cfg` directly using a text editor.

### Exchange Configuration

<u>File Name</u>	<u>Description</u>
<i>Exchange.cfg</i>	This file contains a list of exchanges that require your local area code when dialed. If a callback number has an exchange that appears in this list, APM includes the local area code when dialing this callback.

To edit, click **Config. | Exchanges** in the CTI Server window, or edit `tfb/data/exchange.cfg` directly using a text editor.

### Callback Restrictions Configuration

<u>File Name</u>	<u>Description</u>
<i>Restrict.cfg</i>	This file contains a list of <i>allowable</i> area codes for Callback. If a callback number does <i>not</i> have an area code in this list, APM notifies the caller, and the callback is automatically refused.

To edit, click **Config. | Callback Restrictions** in the CTI Server window, or edit `tfb/data/restrict.cfg` directly using a text editor.

Note that the configuration of these files also affects Outbound Call Campaign dialing.

**More Information** – For more about specific configuration files, see Appendix n, Configuration Files. For more on editing .cfg files see also, “Getting Started with APM” in Chapter 1.

## Completing Server Configuration



After modifying configuration files and pilot parameters, *close the CTI Server window and restart it by double-clicking the TFB CTI Server icon*. This initializes your changes, and completes server configuration for Callback. When you configure the ACD as shown in the next section, Callbacks will be operational.

## Configuring the PBX/ACD for Callbacks



Next, route calls to your Callback scenarios by including an *IVR Announcement 9* in the CCVs for the desired pilots. Doing so will activate Callback for those pilots. APM handles these calls according to the incoming pilot number, as configured on the TFB Pilot Parameters form. If you haven't already done so, you must also configure a separate UCD group to reserve IVR ports for announcing outbound call information to agents.

### To configure the ACD for Scheduled Callback

- 1 Create a callback UCD Group with **Pilot number = IVR pilot + 1**.

For example, Main IVR UCD Group 5000  
 First analog port 5000  
 Callback UCD Pilot 5001

**NOTE** This UCD group can be shared by ASAP Callback, Scheduled Callback, Internet Callback, and Outbound Call Campaigns. It does not need to be recreated for each feature! If you've already set up a separate UCD group for one of those features, you can skip to step 2.

#### UCD Groups for an 8 port system

5000 UCD Group 1 IVR Port 1  
 5001 UCD Group 2 IVR Port 2  
 5002 UCD Group 2 IVR Port 3  
 5003 UCD Group 1 IVR Port 4  
 5004 UCD Group 1 IVR Port 5  
 5005 UCD Group 1 IVR Port 6  
 5006 UCD Group 1 IVR Port 7  
 5007 UCD Group 1 IVR Port 8



UCD Group for speaking Outbound Call information to agents

APM automatically uses the group defined as **IVR Pilot + 1** for outbound calling functions.

- 2 **To activate Callbacks**, create CCVs to route calls to Callback scenarios by sending *IVR Announcement 9*.

#### SAMPLE Callback CCV

	1) Pause	6
	2) Queue to	1
	3) ETA Greater	30
▶	4) IVR Announcement	9
	5) Pause	30
	6) Announce	1
	7) Pause	30
	8) Goto CCV step	6

## Using Callback Reports

You can generate callback status reports in a Notepad window at any time. From Notepad, you can print the report, or save it to another file name for review or archive.

### Generating Callback Reports

To generate a report of current callbacks

- Click **Reports** in the CTI Server window
- Click **Current Callbacks**
- Click **File | Print** to print the current report window

To generate a report of callbacks for the entire day

- Click **Reports** in the CTI Server window
- Click **Today's Callbacks**
- Click **File | Print** to print the current report window

### Reading Callback Reports

Callback reports come in two formats.

## Troubleshooting and Maintenance

Like Queue/ETA, Callback gives you control both from ACD CCVs and from the TFB Pilot Parameters form. As your requirements evolve, you can edit, add, or delete callback scenarios by following the process outlined in the previous sections.

### *ASAP Callbacks on any given pilot are operational if...*

- Pilot parameters are configured to enable callback.
- Outbound dialing is set up in *.cfg* files (see “*Outbound Dialing Configuration*”).
- The CTI Server window has been closed and restarted.
- The appropriate CCVs are set up to send *IVR Announcement 9*.

### *Periodic callback maintenance may include...*

- Altering callback **Start** and **End day** times based on seasonal requirements.
- Periodic report review (see “*Callback Reports*”, later in this chapter.).
- Adjusting **Min. Que Time** as you call loading profile dictates.
- Periodic backups of announcements (Click **Config | Backup** in CTI Server).

Be sure to close the CTI Server window and restart it with each configuration change.

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**IMPORTANT** Whenever you route calls using *IVR Announcement 9*, any features that are configured by pilot (on the TFB Pilot Parameters form) may potentially be activated, including ASAP Callback, Scheduled Callback, and Queue/ETA. For each pilot, be sure your desired configuration for all three of those features is defined correctly.

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## Circumventing Callback-related Abandoned Calls

Unlike ASAP Callback, Scheduled Callback does not maintain a phantom queue position for callers who opt to use this feature. Because of this, each caller who opts for a Scheduled Callback will generate an abandoned call event in the ACD. Typically, the ratio of Scheduled Callbacks to ASAP Callbacks is small, and some call centers may find the associated abandoned calls to be at acceptable levels.

For others, it may be desirable to eliminate any abandoned call reporting that occurs as a result of Scheduled Callback. This can be done by routing calls to a dedicated pilot, whose function is merely to hang up on the caller after the callback transaction has been completed.

To hang up on callers after the callback transaction

- Create a dummy pilot
- Hang up on the call in the CCV

SAMPLE	Hangup CCV
	1) Pause 6
▶	2) Announcement 3 // A "Thanks & Goodbye"
	3) Pause n // Pause for above annce
	4) Hangup
	5) END

## How are Callbacks Presented to Agents?

Because APM fully ‘blends’ callbacks with inbound calls and other activity, agents are typically presented with callbacks that are interspersed with inbound calls. Although some agents may have experience with other outbound calling features – such as predictive dialing – TFB’s callback differs from similar features in several important ways:

- When a callback is initiated, the agent hears a prompt “Preparing a callback” or similar message. The IVR port is used only to speak Callback information to the agent. APM dials the call for the agent via *Infolink*.
- When generating an outbound call, APM puts callbacks in the queue using the same pilot as the original call.
- APM dials the callback using the agent’s phone line. Any outbound restrictions placed on the agent’s position, will also restrict APM’s callback capability.
- The agent gets screen pop information about the caller if that option is selected in TFB Pilot Parameters for the incoming pilot of the call.
- You can configure APM to speak the caller’s account number to agents (if available). To do this, select **Enable Whisper** in TFB Pilot Parameters form.
- Unlike typical outbound dialing products from other vendors, calls are presented to agents as they are dialed, so agents will likely hear ringing before the call is picked up.

## How Scheduled Callbacks are Presented to Callers

The utility of callback lies not only in its ability to expedite call handling during inbound peaks, but also in its ability to reduce caller frustration. The following topics explain how the initial callback is offered, as well as how the return callback is presented to the caller. Also included are notes on how to tailor either presentation to meet your requirements.

### Presentation of the Initial Call: The Offer

Callers hear this sequence of prompts:

- The caller hears the initial announcement, as configured in **Announcement** on the Pilot Parameters form. This is typically a “Thanks for calling, all our agents are busy...” message. Record your announcement with the Recording Utility (see *Recording Custom Announcements* in Chapter 1.)
- If you have Queue or ETA announcements enabled for that pilot, the caller will hear those after the initial announcement.
- Callback is then explained to the caller with this, or a similar message:  

```
" If you do not wish to wait, you can leave a message for
immediate callback. You will NOT lose your place in line,
we will call you back as soon as the first representative
becomes available, JUST, as if you were to remain on the
line. Or, you can specify a later call back time which
would be more convenient for you. "
```
- Depending on how your system is configured, the caller will hear a series of menu options similar to this:  

```
" to leave a message for immediate callback, press 1.
to leave a message for later callback, press 2.
to remain on hold for the first available representative,
press 3, or stay on the line. "
```

The exact wording may vary slightly with your system.

- Callers enter their callback time phone number. The system checks that the time is within allowable callback time you specified.

## Presentation of the APM Call: The Reply

Unlike other types of outbound dialing, target callers are actually *expecting* Callbacks. Because the call is presented to an agent as it's dialed, the caller never experiences silence or a ringing tone when answering the callback – the agent is already waiting on the line.

Note that Scheduled callbacks are not necessarily *dialed* at the time specified by the caller, they are merely placed in queue. Depending on other calls in the queue, the actual outbound call may be generated after the specified callback time.

## Using Callback Reports

Callback reports provide useful metrics for gauging the effectiveness of your callback configuration, as well as the actual billable toll time saved. You can generate callback status reports in a Notepad window at any time. From Notepad, you can print the report, or save it to another file name for review or archive.

## Generating Callback Reports

To generate a report of current callbacks

- Click **Reports** in the CTI Server window
- Click **Current Callbacks** or **Today's Callbacks**
- Click **File | Print** to print the current report window

## Reading Callback Reports

Callback reports provide information to help determine ROI and cost savings, as well as the status of any given callback.

Control	Status	Flag	T	Pilot DN	CB Phone ANI	In Time	Last Time	CB Time	Save
0575489	GOOD	0080	0	2712	3105558279	10:07	10:12		276
0575493	GOOD	0080	1	2706	3105552373	10:09	10:11		102
0575497	GOOD	0080	0	2712	3105557019	10:09	10:15		326
		1 07		2905	3105558279				
		2 17		2917	3105552373				
		1 02		2931	3105557003				
<p>•</p> <p>•</p> <p>•</p> <p>Total Callbacks 421</p> <p>Total Saved 126150</p>									

Annotations:

- Whether callback is completed, pending, or failed (points to Status)
- Pilot of the inbound call, and PBX number of agent (points to Pilot DN)
- Callback Phone number/ANI of original call (points to CB Phone ANI)
- Total seconds of hold time/trunk time saved by this Callback (points to Save)
- Total number of callbacks processed during reporting period (points to Total Callbacks 421)
- Total seconds of inbound trunk time saved during reporting period (points to Total Saved 126150)

## SAMPLE DAILY CALLBACK REPORT

Daily Callback Report Generated on 12/04/1997 at 23:46

Control	Status	Flag N C	T	Pilot DN	CB ANI	Phone	In Time	Last Time	CB Time	Save
00096390	Good	0080 1 10	0	2048 7036	6027040984 000		08:26	08:28		52
Acct - 145545										
00096401		0080 1 19	0	2048 7137	6024151583 000		08:29	08:34		239
00096407	Good	0080 1 01	0	2048 7052	6022462856 000		08:32	08:36		222
Acct - 232603										
00096411	Good	0080 1 16	0	2048 7126	2062980202 000		08:33	08:38		245
00096427	Good	0080 1 06	0	2048 7048	6026934295 000		08:37	08:41		179
Acct - 400650										
00096454	Good	0080 1 01	0	2048 7015	6028444539 000		09:12	09:16		180
00096471	Good	0080 1 07	0	2048 7036	6025162252 000		09:15	09:22		379
00096476	Good	0080 1 20	0	2048 7036	6028388763 000		09:16	09:24		413
00096480	Good	0080 1 12	0	2048 7056	6017810599 000		09:17	09:24		389
00096484	Good	0080 1 07	0	2048 7066	6027650354 000		09:18	09:26		434
Acct - 38448										
00096487	Good	0080 1 13	0	2048 1020	6029917509 000		09:18	09:27		522
00096506	Good	0080 1 11	0	2048 7066	6029786147 000		09:22	09:29		374
00096513	Good	0080 1 11	0	2048 7126	6029472002 000		09:25	09:31		329
Acct - 15730										
00096516	Good	0080 1 17	0	2048 7066	6029486090 000		09:24	09:32		440
00096525	Good	0080 1 14	0	2048 7048	6028328466 000		09:27	09:36		485
00096529	Good	0080 1 19	0	2048 7015	6024860516 000		09:28	09:36		463

**SAMPLE DAILY CALLBACK REPORT (cont'd)**

Control	Status	Flag N C	T	Pilot DN	CB ANI	Phone	In Time	Last Time	CB Time	Save
00096531	Good	0080	0	2048	3603988227		09:28	09:37		483
		1 08		7015	000	0				
00096537	Good	0080	0	2048	6024172118		09:29	09:38		487
		1 20		7033	000	0				
00096552	Good	0080	0	2048	8006243698		09:33	09:40		391
		1 10		7015	000	0				
00096554	Good	0080	0	2048	3164344840		09:34	09:40		358
		1 18		7033	000	0				
00096559	Good	0080	0	2048	6024960937		09:34	09:41		380
		1 11		7126	000	0				
Acct - 410480										
00096570	Good	0080	0	2048	6025162252		09:36	09:47		615
		1 15		1016	000	0				
Acct - 404615										
		1 10		7066	000	0				
00098713	Good	0080	0	2048	6022646831		17:26	17:31		264
		1 20		7148	000	0				
Acct - 420365										
00098718	Good	0080	0	2048	6029448259		17:26	17:32		312
		1 18		7033	000	0				
Acct - 182322										
00098735	Good	0080	0	2048	6029550009		17:31	17:35		205
		1 10		7137	000	0				
00098739	Good	0080	0	2048	9163325501		17:32	17:35		150
		1 16		7033	000	0				
00098743	Good	0080	0	2048	6029903429		17:34	17:36		65
		1 08		7031	000	0				

**Total Callbacks**

528

**Total Saved**

244726

Total seconds of inbound  
Trunk charges saved for  
Reporting period


## Report Fields

<b>Control</b>	Internal number used to track the call
<b>Status</b>	Current Status of this callback Good – Callback completed Failed – Callback not completed after all retries In Queue – Callback queued for an agent
<b>Flag</b>	Numeric code corresponding to the Status field
<b>T</b>	Number of retries
<b>Pilot</b>	The ACD Pilot number of the incoming call
<b>CB Phone</b>	The 10-digit callback phone number specified by the caller
<b>In Time</b>	The TOD the callback was requested
<b>Last Time</b>	Most recent TOD CB number was dialed
<b>CB Time</b>	TOD scheduled for callback (scheduled CB only)
<b>Save</b>	Seconds of inbound toll charges/hold time saved on this call
<b>N</b>	CTI Server Node that processed the callback
<b>C</b>	Channel
<b>DN</b>	DN of agent the call was most recently dialed from
<b>ANI</b>	10-digit ANI (caller ID) from the original inbound call
<b>Acct</b>	Caller's account number, as available

## Callback Reports Definitions

When a callback is generated, the ACD tells APM via Infolink whether the call succeeded or failed. Unfortunately, it doesn't provide the specific conditions of either result. So what conditions can result in an incomplete call? Actually, several: Tri-tone, busy signal, ring with no answer, agent's PBX line is on hold, call restrictions on the agent phone that prevent the outbound call.

## Troubleshooting Scheduled Callback

Problems	Solutions 
Callers on certain pilots don't get offered a callback .	<ul style="list-style-type: none"><li>▪ Callbacks are only provided by CTI Server when it receives an <i>IVR Announcement 9</i> over <i>Infolink</i>. Ensure the appropriate CCVs contain the line: <i>IVR Announcement 9</i></li><li>▪ Ensure the problem pilots are configured in TFB Pilot Parameters with Enable Callbacks selected.</li></ul>
Some callers still get offered callbacks, even when they come in on Pilots not configured in TFB Pilot Parameters.	<ul style="list-style-type: none"><li>▪ When an <i>IVR Announcement 9</i> is sent, but the associated Pilot is not defined in Pilot Parameters, CTI Server uses pilot 000000 as the default. Callbacks will be offered to default callers if it is selected on Pilot 00000.</li></ul>
Callers are being forced to accept a callback without being offered a choice.	<ul style="list-style-type: none"><li>▪ Check the value specified in <b>Max. Que Time</b>. Note that this value is in <i>minutes</i>. <b>Min. Que Time</b> is in <i>seconds</i>. Ensure that these values are correct, and that Max. is greater than Min.</li></ul>

## Scheduled Callback Quick Reference Guide

<b>What it Does</b>	Allows callers in queue to request a callback at a time of their choosing.
<b>Executable</b>	Embedded in APM
Configuration <b>CTI Config.</b>	<ul style="list-style-type: none"> <li>▪ Callback scenarios must be configured in the TFB Pilot Parameters form</li> <li>▪ Outbound dialing preferences must be configured in related .cfg files</li> </ul>
Configuration <b>ACD Config.</b>	<ul style="list-style-type: none"> <li>▪ CCVs must send <i>IVR Announcement 9</i> to route callers to Callback scenarios.</li> <li>▪ A dedicated UCD group must be configured for outbound functions.</li> </ul>
Configuration <b>Related .cfg Files</b>	<ul style="list-style-type: none"> <li>▪ lld.cfg (lists AC/Exchgs that don't require a '1' prefix)</li> <li>▪ exchange.cfg (exchanges that must include local AC)</li> <li>▪ restrict.cfg (allowable area codes for callback)</li> </ul>
<b>Related Modules</b>	Typically used with Queue/ETA, and an ASAP callback offer.
<b>Related file locations</b>	---
<b>Notes</b>	---



