

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

**Call Classifier Add-on
User Guide**

Publication Information

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Contents

Introduction

Conventions	iii
Related Documents/Media	iv

Strata CS Call Classifier

Overview	1
What You Can Do With Call Classifier	1
How Call Classifier Works	2
Call Progress	4
Installation	5
Requirements for Call Classifier	5
Install Strata CS Call Classifier	6
Register Call Classifier as Strata CS IVR Plug-in	6
Start Call Classifier	7
About Call Classifier Window	8
Call Classifier Window Actions	8
Ordering Business Rules in Call Classifier Window	9
All Calls Rule	9
Import Rules from Call Classifier 1.0	9
About Sample Configurations	9
View and Edit Sample Configuration	10
Use Sample Configuration	11
Update Agent Regions Database As Area Codes Change	12
Add a Rule in Call Classifier	13
Prompt Caller to Enter Number	16
Using Custom Database Queries	19

Contents

Strata CS Call Classifier

Create Query or Stored Procedure to Search Your Database	20
Configure Call Classifier to Use Query or Stored Procedure	23
Get Caller Information with ThinkDirectMarketing, Inc.	27
Requirements for Using ThinkDirectMarketing’s DigitalDATA	27
Contact ThinkDirectMarketing	28
Register Your Digital DATA License	28
Test DigitalDATA Connection	29
Attach DigitalDATA Information to Calls	30
Present DigitalDATA Information to Agents	31
Manage DigitalDATA Cache	33
View Call Classifier Information in Call Monitor	34
Route Calls to the Call Classifier	34
Route All Calls to Call Classifier	34
Route Calls Based On Auto Attendant Selection	35
Route Calls Based On DID	35
Use Multiple Call Classifier Configurations	35
Step 1: Define Multiple Call Classifier Configurations	36
Step 2: Register Multiple Call Classifiers as IVR Plug-ins	37
Modify Call Classifier .INI Settings	38
Troubleshoot Call Classifier	38

Introduction

This guide describes how to install, set up, and run the Call Classifier 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.
“Type”	Indicates entry of a string of text.
➤	Denotes a procedure.
➤	Denotes the step in a one-step procedure.
>	Denotes a sequence of computer menu or screen selections. For example: Choose Start > Programs > Call Center Scoreboard.
Courier	Shows a computer keyboard entry or screen display.
See Figure 10	Grey words within the printed text denote cross-references. In the electronic version of this document (Strata CS Library CD-ROM or FYI Internet download), cross-references appear in blue hypertext.

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

Strata CS Call Classifier

Overview

The Strata CS Call Classifier 2.0 is a powerful Strata CS Add-on Solution that can greatly improve the productivity of call centers. The Call Classifier lets businesses identify callers, intelligently route calls, and present call center agents with scripts and related caller information before they answer the phone.

To display detailed caller information on agents' screens, the Call Classifier can query any ODBC-compliant database (for example, Microsoft® Access®, SQL Server, Excel, Oracle, etc.) or the ThinkDirectMarketing DigitalDATA service of more than 120 million North American businesses and residences. In addition the Call Classifier can verify caller data and route callers to the optimal agent using custom business rules.

What You Can Do With Call Classifier

The following are examples of how you can use the Call Classifier to benefit your business or call center:

- Set a caller's queue priority based on issue number, customer number, or caller ID to bump them up in line.
- Get detailed profile information on any business or end user from any ODBC database or the extensive ThinkDirectMarketing DigitalDATA service.
- Prompt callers for any numeric information, and validate it based on any ODBC database, then send the resulting profile information to the agent. Prevent nonvalidated callers from reaching an agent.
- Based on the area code that the customer is calling from, route callers to the agents most appropriate for that region.

- Based on your own custom or company database, attach issue numbers, customer profiles, addresses, and other information to the call when customers call.
- Add agent call scripts (with optional embedded customer name) to the Call Notes based on caller ID and a custom database query (for example, "Is Mr. Jones available? This is Fred Holmes from XYZ Corp...").
- Add caller ID name where none exists by looking up the caller ID number in a white pages database or database of area codes and regions.
- Add meaning to DID numbers. For example, ABC corp has a different support phone number (using DID) for each of their products. As the Call Classifier receives calls, it can add the appropriate product name to the Notes field based on DID, then route the call to the support queue. Agents using the Call Monitor can see the product name before answering the call, resulting in a shorter call and a more informed agent.
- In conjunction with a third-party fax server, allow a single DID number to be used for both faxes and calls. Use Strata CS's auto attendants for fax detection, and then use the Call Classifier to route calls to users if no fax is detected.
- Create a global "black list" so that all calls from a set of particular numbers are sent directly to voice mail or are disconnected.
- Hide certain or all caller IDs from users by setting caller ID to nothing.
- Add address information to calls based on caller ID. If caller ID isn't present, you can have the Call Classifier prompt the caller for their phone number.

How Call Classifier Works

The Call Classifier can recognize incoming calls based on the following criteria:

- DID (the phone number dialed by the caller)
- Caller ID name or number
- Call Notes
- Custom data variables

Call recognition can be based on matching any of the above criteria to any of the following:

- Any number or text that you enter in a Call Classifier business rule

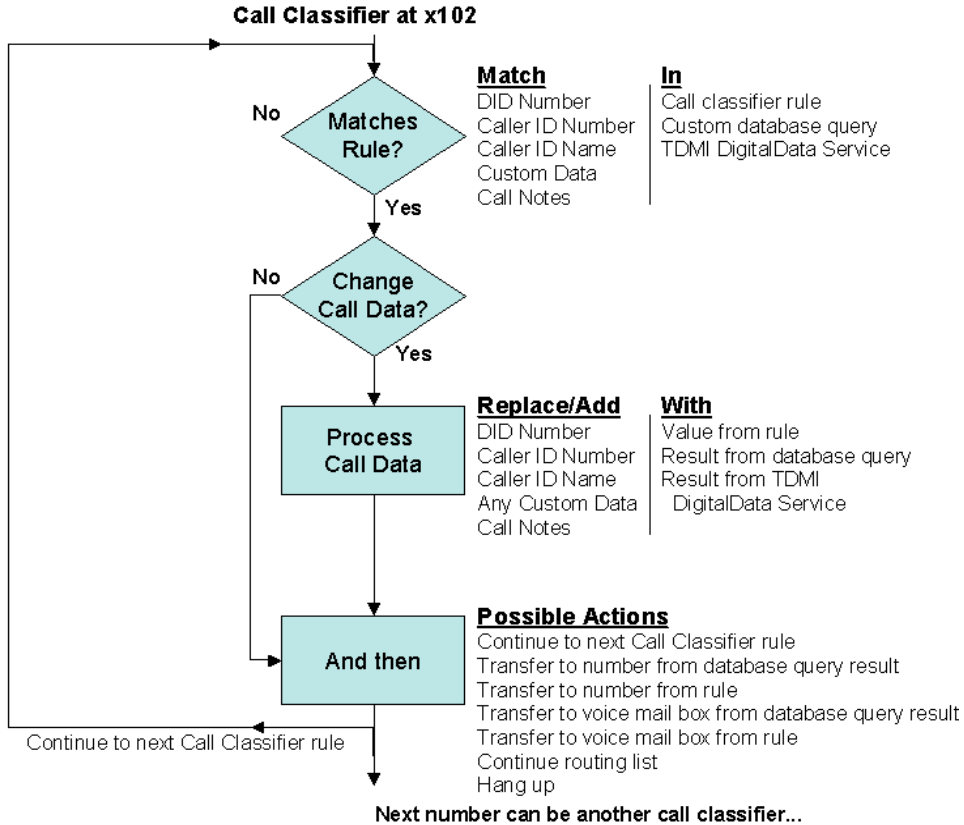
- A record in your company's ODBC database
- A record in ThinkDirectMarketing's DigitalDATA service

Once calls are recognized, you can perform the following actions on them:

- Route them to the extension or voice mailbox of your choice
- Populate the *Call Notes* field with custom information
- Replace the DID number, caller ID number, or caller ID name with text of your choice
- Set or reset Custom Data variables attached to the calls
- Hang up on the calls
- Process additional Call Classifier business rules

Call Progress

The following diagram illustrates call progress through the Call Classifier:



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.

You must shut down the Strata CS Server before installing the Call Classifier, so it's best to install it after hours, when you won't be interrupting users.

Requirements for Call Classifier

The Call Classifier requires the following:

- Microsoft Windows NT® 4.0 SP6 or higher
- Strata CS 4.0 SP1 or higher

In addition, the following are requirements to use these Call Classifier features:

- Network access to your database is required to do custom database queries (see [“Using Custom Database Queries” on page 19](#)).
- An account with ThinkDirectMarketing is required to use their DigitalDATA service (see [“Get Caller Information with ThinkDirectMarketing, Inc.” on page 27](#)).
- Microsoft Access version 2000 or higher is required to manage the Agent Regions sample database (see [“About Sample Configurations” on page 9](#)), as well as the database containing the local cache for ThinkDirectMarketing's DigitalDATA service (see [“Manage DigitalDATA Cache” on page 33](#)).

Licensing

The Call Classifier is licensed per Strata CS Server. It is also an IVR Plug-in, and therefore adheres to the same licensing rules that apply to IVR Plug-ins. See *Strata CS Administrator Manual* for full licensing information. The Call Classifier can handle an unlimited number of simultaneous calls, but each simultaneous call to the Call Classifier will consume one station license for the duration of the call. For example, if you have a system with 16 station licenses, and 15 of those stations are assigned to users, you have one free station license that can be used for one call to the Call Classifier. Before running the Call Classifier, ensure that you have adequate station licenses available.

Install Strata CS Call Classifier

Make sure that the Strata CS Server is shut down before proceeding.

The rest of this section assumes that you have successfully downloaded the Call Classifier .zip file. Download instructions can be found on the card included in the Call Classifier packaging.

Note If you used Call Classifier 1.0 and you want to continue using its rules, back up its database file and INI file before installing Call Classifier 2.0. After installation, see [“Import Rules from Call Classifier 1.0”](#) on page 9.

► To install the Call Classifier on the Strata CS Server

1. Unzip the Classifier2.zip to a temporary location.
2. Run Setup.exe from the Classifier2 file location.
3. Follow the instructions in the Call Classifier Setup window.

Note You can install the Call Classifier to any PC, enabling you to manage your Call Classifier business rules from anywhere on the network.

Register Call Classifier as Strata CS IVR Plug-in

Once the Call Classifier is successfully installed, you must register it with the Strata CS Server as an Interactive Voice Response (IVR) Plug-in, so that its business rules affect Strata CS calls.

Note This procedure will require a shutdown and restart of the Strata CS Server to complete. Schedule this procedure for after-hours when user interruption will be at a minimum.

1. Start the Strata CS Administrator.

2. Choose File > New > IVR Plug-In. The IVR Plug-in screen displays (shown right).
3. Enter the following information:
 - Name. Name of the plug-in. This can be any text you choose, for example “Call Classifier.”
 - Extension. Extension assigned to the IVR plug-in. Enter any available extension number.
 - Program ID. Set this to “CCPlugin.Classifier” for the Call Classifier.
 - Start one instance when the server is started. Make sure this checkbox is not checked.

4. If you are registering one of the sample configurations, or any additional Call Classifier configuration, you must distinguish it using a custom data variable. For instructions, see [“Register Multiple Call Classifiers as IVR Plug-ins”](#) on page 37.
5. Click OK to save the Call Classifier details.

Note If you see the error “The program ID does not exist on the Strata CS Server. Are you sure you want to use this program ID?” click No and check the text entered in the *Program ID* field. It must be set to CCPlugin.Classifier.

6. Stop and restart the Strata CS Server to complete this configuration.

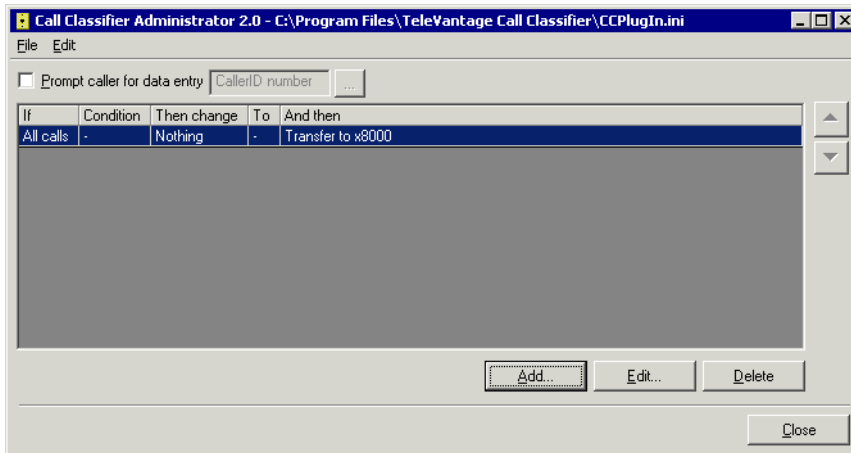
Start Call Classifier

- To start the Call Classifier, choose Start > Programs > Toshiba Strata CS > Strata CS Call Classifier Administrator.

The first time you start the Call Classifier, you must enter the serial number and verification key to activate it.

About Call Classifier Window

The Call Classifier window (shown below) displays the list of business rules you create to handle incoming calls. You can create as many rules as you want.



The title bar displays the name of the currently loaded configuration, by default CCPlugIn.ini. You can save and create as many different configurations as you want. Each configuration can have its own set of business rules. See [“Use Multiple Call Classifier Configurations” on page 35](#).

Call Classifier Window Actions

You can perform the following actions on rules in the window:

- To add a new rule, click Add. See the next section.
- To edit an existing rule, select it and click Edit.
- To delete a rule, select it and click Delete.
- To reorder a rule in the list, select it and click the up or down arrow buttons.

Ordering Business Rules in Call Classifier Window

You can have the Call Classifier apply several business rules to a call in sequence. For example, the first rule could identify support calls by DID and attach the name of the product to the *DID* field, then the second rule could take the Caller ID and search your database to find the date of this customer's last call, attaching the information to the *Call Notes* field. To have a rule process a call after another rule, make sure the rules are listed with the first rule to be processed at the top and the last rule to be processed at the bottom. See [“Add a Rule in Call Classifier” on page 13](#) for details.

In the case of conflicts between rules, the highest-listed rule will be used first. For example, you have two call rules, one that handles calls from caller ID (617) 555-1212 and one that handles calls to DID 5001. If a call comes in with Caller ID (617) 555-1212 and DID 5001, the call will be handled by whichever rule is listed first.

All Calls Rule

The Call Classifier must always have at least one business rule, called the All calls rule, which determines what happens to a call if it is not handled by any other rules. By default, the All calls rule transfers calls to extension 8000, which is the default auto attendant extension. You can modify the All calls rule, but you cannot delete it.

Import Rules from Call Classifier 1.0

If you created rules using Call Classifier version 1.0, you can import those rules into Call Classifier 2.0 and continue using them.

- To import rules, choose File > Import 1.0 database.

About Sample Configurations

Call Classifier 2.0 comes with three sample configurations that can get you started using the Call Classifier right away. You can also use the sample configurations as references for designing your own. The sample configurations are:

- **DID to Caller ID.** This sample configuration uses three business rules. It is designed for a call center that supports two products, each with its own phone number that customers call. The configuration analyzes incoming calls by DID to determine which product the customer is calling about, then puts the name of the

product into the *Caller Id Name* field of the call. Then it transfers the calls to the call center extension.

- Agent routing via area codes. This sample configuration uses a custom database query. It is designed for a North American call center with different queues that handle calls from different regions. The configuration analyzes incoming calls by the area code of the caller ID number to determine where the caller is calling from, and transfers each call to the extension of the queue responsible for that region. You can also use the sample without queues by replacing queue extensions with agent extensions.
- TDMI DigitalData. This sample configuration demonstrates the Call Classifier's link to ThinkDirectMarketing Inc.'s DigitalDATA service, which analyzes calls by caller ID number and returns caller profile information such as the caller's address. The configuration is designed to provide agents with as much information about the caller as possible. It first makes sure that caller ID is present by prompting callers without it to enter their phone number. Then it performs a custom database query by sending the caller ID number to a sample contact database (MyContacts.mdb, in the Call Classifier directory). If the number is found, the *Call Notes* field is updated with contact information and the call is sent to the queue. If no match is found, the Call Classifier performs a DigitalDATA query, first checking the Call Classifier's local cache of previous DigitalDATA responses, and then, if no local match is found, querying the DigitalDATA service itself. The Call Classifier populates the *Call Notes* field with the result of the query (usually caller name and address), and then transfers the call to the queue.

View and Edit Sample Configuration

To view the business rules that make up a sample configuration, or to customize them for your own use, do the following:

1. Start the Call Classifier by choosing Start > Programs > Toshiba Strata CS > Strata CS Call Classifier Administrator.
2. Choose File > Open, and select the .INI file of the sample configuration you want to use. The .INI filenames are the same as the configuration names in the previous section.
3. To view or edit a rule, double-click it. For detailed information about rules, see the rest of this manual.

Use Sample Configuration

Before using a sample configuration, you must register it as an IVR Plug-in using the Strata CS Administrator. For instructions see [“Register Multiple Call Classifiers as IVR Plug-ins” on page 37.](#)

To use a sample configuration, simply route calls to the extension of the IVR Plug-in for that configuration. For instructions routing calls, see [“Route Calls to the Call Classifier” on page 34.](#)

Tips on Using Agent Routing via Area Codes Sample

A sample Microsoft Access database, Agentregions.mdb, is provided with a pre-defined Query to support this configuration (it is located by default at C:\Program Files\TeleVantage Call Classifier\Agentregions.mdb). The database contains all North American area codes with a field where you can enter the extension responsible for that area code. By default all area codes are handled by extension 100. Before using this configuration, you should edit the database to specify the extensions you want for each area code. For instructions on editing a database, refer to your Microsoft Access documentation.

For tips on updating the database with area code changes, see [“Update Agent Regions Database As Area Codes Change” on page 12.](#)

Tips on using TDMI DigitalDATA Sample

To use this configuration, you must have a link to the TDMI DigitalDATA service. See [“Get Caller Information with ThinkDirectMarketing, Inc.” on page 27.](#)

To test a case where a match is found in the sample contact database, you can do either of the following:

- Edit the MyContacts.mdb database using Microsoft Access, and add a contact record with a phone number that matches your caller ID. See your Microsoft Access documentation for instructions.
- When prompted to enter a phone number, enter a number that’s in the MyContacts database, for example 617 354 0600. Note that to be prompted, you must edit the caller prompting settings (click) and uncheck “Prompt caller only if Caller ID number is empty.” For more information about caller prompting, see [“Prompt Caller to Enter Number” on page 16](#)

Update Agent Regions Database As Area Codes Change

The sample database Agentregions.mdb contains all North American area codes with descriptions of each region. However, as time goes by new area codes are often added and old ones are split into multiple regions. Please note that Toshiba does not provide updated versions of this database as area codes change. For your convenience we have included two ways for you to obtain the most up-to-date area code information.

- North American Numbering Plan Administration NANPA (www.nanpa.com) is the official organization that manages the North American dial plan and publishes future area code changes. While they do not provide a database of area codes themselves, they work with companies like Telcordia who produce a database called the NNAG that you can download and then import into Microsoft Access. The database can be downloaded from www.trainfo.com/products_services/tra/nnagonly.html.
- A web site at www.cs.ucsd.edu/~bsy/area.html contains a list of area codes casually maintained the cooperation of people on the Internet. It is not an official site, but it does provide some very useful comments on each area code that do not exist in the Telcordia NNAG. This is the site that was used to populate the included AgentRegions.mdb database.

To use either of these data sources, you must use Microsoft Access or some other tool to organize the data into a searchable database table. Microsoft Access' File > Get External Data > Import option provides useful tools to import and format data appropriately for searching. For instructions on this and other Microsoft Access features, refer to Microsoft Access' documentation.

Add a Rule in Call Classifier

To have the Call Classifier process incoming calls, you create one or more rules that define which calls to affect, and what to do with those calls.

1. In the Call Classifier window, click Add. The Add new entry dialog box opens (shown right).
2. In the Match incoming call section, define which incoming calls this rule will affect using the following fields:
 - *When.* Select one of the following fields by which to recognize incoming calls:
 - DID. The rule affects all calls that dial a specific DID number.
 - Caller ID number or Caller ID name. The rule affects all calls beginning with certain caller ID information.

Note If you choose caller ID number, you can automatically attach the caller's address and other information to the call, using the ThinkDirectMarketing DigitalDATA service. See [“Get Caller Information with ThinkDirectMarketing, Inc.”](#) on page 27.

- **Call Notes.** Call notes are set by Strata CS features only, so a rule based on call notes would affect only calls previously handled by Strata CS, for example a call passed from one Call Classifier rule to another, or a call previously handled by a Strata CS user, auto attendant, or Plug-in that set the Call Notes.
- **Custom Data.** Like Call Notes, custom data is set by Strata CS features only, so the rule would only affect calls that were previously handled by Strata CS, including another Call Classifier rule, IVR-Plug-in, or auto attendant. If you select Custom Data, enter the Variable name of the custom data variable by which you will recognize calls.

Example: You could have an auto attendant set a Custom Data variable for product choice based on caller selection. Then the calls get sent to the Call

Strata CS Call Classifier

Add a Rule in Call Classifier

Classifier, which performs a database based query based on the selected product to return the quantity of the product left in inventory. The query result is placed in the *Call Notes* field. (For more information about custom data variables, see *Strata CS Administrator Manual* and the *Strata CS Call Center Administrator Guide*.)

- All calls. This rule affects all calls to the Call Classifier. The Call Classifier always contains at least at least one rule for All calls, so that all calls are processed in some manner.
- Matches this text. Use this drop-down list to choose when the criteria selected matches a call. You can match a call in the following ways:
 - Matches this text. Compares the criteria to specific text. For example, compare the *DID* field of the call to the number 6173540600. Enter the custom text (for example, 6173540600) in the field below the drop-down list. Do not use dashes or spaces, since the number must exactly match the contents of the DID field. Select either Matches this text (the rule activates on all calls with DID 6173540600) or Does not match this text (the rule activates on all calls except those with DID 6173540600). Add multiple rules to match multiple text values.
 - Begins with this text. Compares the beginning of the criteria to a specific custom text. For example, compare the beginning of the caller ID number field to 212, which will match all calls from the 212 area code. Enter the text (for example, 212) in the field below the drop-down list. Select either Begins with this text (the rule activates on all caller IDs beginning with 212) or Does not begin with this text (the rule activates on all caller IDs except those beginning with 212).
 - Exists in this custom database. Compares the criteria to records in your company database. For example, compare the call's caller ID to the phone numbers of everyone in your contact database. See [“Using Custom Database Queries” on page 19](#) for further instructions.

Note Only one rule in the Call Classifier can use a custom database query. If you need to perform two different custom database queries on calls, use multiple configurations of the Call Classifier together. See [“Use Multiple Call Classifier Configurations” on page 35](#).

- Exists in the TDMI DigitalData service. Compares the Caller ID number to the records in ThinkDirectMarketing's DigitalDATA service to return the

caller's address and other profile information. See [“Get Caller Information with ThinkDirectMarketing, Inc.” on page 27](#) for instructions. This option is available for Caller ID number only.

Note Only one rule in the Call Classifier can use a TDMI DigitalDATA query.

3. To add custom information to matched calls, check “Change call data.” You can add information to Strata CS fields such as Call Notes or a custom data variable, or to existing fields such as DID or caller ID, replacing the information that comes in with the calls. The information can be seen by agents using the Strata CS Client Call Monitor, and is saved with the call in the Call Log.

Note To add information to a custom data variable, you must first have defined that variable in Strata CS. See *Strata CS Administrator Manual* for instructions.

To leave call information unchanged, leave the *Change call data* field unchecked.

To specify how to change call information, use the following fields:

- **Change.** Select the field of the call to which you want to add custom information. Information already in the field (such as a caller ID number) will be overwritten.
 - **To.** Enter the information to write to the field. Anything already in the field will be replaced.
4. Use the Final action drop-down list to route the calls to a destination of your choice. For example, you could have rules that distinguish between eastern and western U.S. calls based on the area code of the caller ID number, and route them to different queues for eastern and western product support. You could also set up a rule that hangs up on known solicitors before they even reach the Strata CS system.

Choose one of the following options:

- **Transfer call to extension.** Routes the call the Strata CS extension of your choice. Enter the extension in the *Extension* field.
- **Continue to next rule.** Sends the call to be processed by the next business rule in the Call Classifier list. See [“Ordering Business Rules in Call Classifier Window” on page 9](#).
- **Send call to voice mail.** Routes the call directly to the voice mailbox of the Strata CS extension of your choice. Enter the extension in the *Extension* field.

- Return call to routing list. Returns the call to the routing list that it came from, if applicable. For example, a user's routing list may be set up to ring extension 102, then call the Call Classifier at extension 555, and then ring extension 103. After the Call Classifier accepts the call and performs any processing, the call returns to the routing list and is sent to extension 103.
 - Hang up call. Disconnects the call.
 - Transfer call to extension (from database). Transfers the call to the extension returned by a custom database query. See [“Using Custom Database Queries” on page 19](#). This option is only available if you selected a custom database query.
 - Transfer call to voice mail (from database). Transfers the call directly to the voice mailbox of the extension returned by a custom database query. See [“Using Custom Database Queries” on page 19](#). This option is only available if you selected a custom database query.
5. Click OK to add the rule to the Call Classifier list.
 6. Repeat these steps to add as many rules as you want.

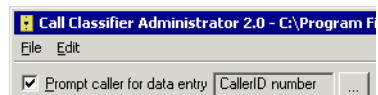
Prompt Caller to Enter Number


You can have the Call Classifier prompt callers to enter an identifying number, such as their phone number, account number, or support issue number. The Call Classifier can then identify the caller based on that number, and attach the number to the call in any supported field, such as caller ID, Call Notes, a custom data variable, etc. The number can then be viewed by the users who answer the call using the Client's Call Monitor.

You can choose to have caller prompting “fill in” information only when it is missing. If the field to be populated already has information, the caller is not prompted. For example, if you're prompting callers to enter a phone number to populate the caller ID number field, the prompt can be skipped for calls that already have a caller ID number. In this way all your calls will have a populated caller ID field, without disturbing the majority of callers.

► To use caller prompting

1. Check “Prompt caller for data entry” on the main window (shown right).



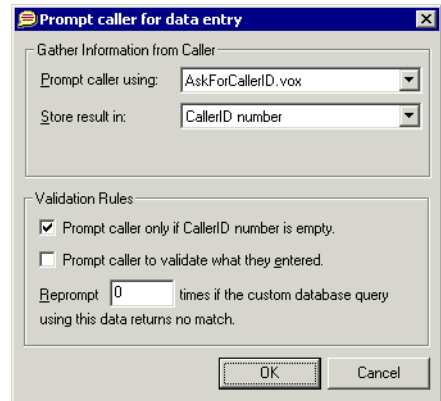
- Click . The Prompt Caller for Data Entry dialog box opens (shown right).
- From the Prompt caller using drop-down list, choose the prompt that Strata CS plays to callers. The list shows all .VOX files in the Call Classifier directory. For instructions on creating your own caller prompts, see the next section.

The text of the pre-recorded prompt files supplied with the Call Classifier are as follows:

- HomePhone.vox. “Please enter your home phone number, area code first, followed by the pound sign.”
- BusinessPhone.vox. “Please enter your business number, area code first, followed by the pound sign.”
- CustomerID.vox. “Please enter your customer id number, followed by the pound sign.”
- IncidentNumber.vox. “Please enter your incident number, followed by the pound sign.”
- IssueNumber.vox. “Please enter your issue number, followed by the pound sign.”
- AccountNumber.vox. “Please enter your account number, followed by the pound sign.”
- Invoice.vox. “Please enter your invoice number, followed by the pound sign.”

Note Do not choose Confirm.vox or NumberEntered.vox as the caller prompt. These files are used for validation (see Step 5).

- From the Store result in drop-down list, choose what field to store the entered number in. Any data already in the field is overwritten.
- To use caller prompting only when the desired information is not present, check “Prompt caller only if __ is empty.” For example, if you selected CallerID number in Step 4, then the Call Classifier will only prompt callers to enter a number when



the CallerID number field of the call is empty. When there is a number in the CallerID number field, callers will not be prompted.

6. If unchecked, all callers are prompted to enter a number, even if a number is already present. The number entered by the caller overwrites the number that came in with the call.
7. To have Strata CS repeat the entered number back to the caller, and prompt the caller to confirm their choice or reenter it, check “Prompt callers to validate what they entered.” If unchecked, Strata CS accepts the number entered without repeating it back to the caller for confirmation.

Note For number validation the Call Classifier uses the prompts Confirm.vox and NumberEntered.vox. Confirm.vox says, “You entered <number>.” NumberEntered.vox says, “If this is correct press 1, otherwise press 2.”

8. If you are matching the entered number against records in a database (see [“Using Custom Database Queries” on page 19](#)), you can respond to non-matches by prompting the caller to reenter the number. For example, if every incoming caller must have an issue number, and a caller’s issue number does not exist in your issue database, the Call Classifier will prompt him or her to reenter it. The reenter prompt is repeated on failed matches for the number of times that you specify. If there is still no match, the call continues with no change to the field that would have been updated, and may be handled by the Call Classifier’s All calls business rule (see [“All Calls Rule” on page 9](#)).

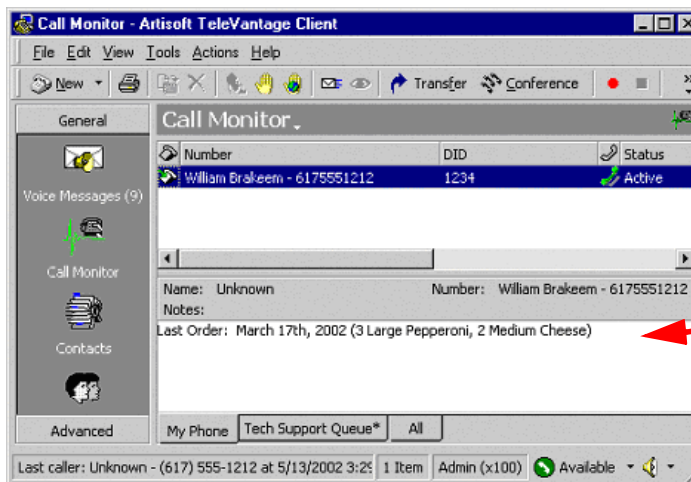
To use this feature, enter a number other than 0 in “Reprompt __ times if the custom database query using this data returns no match.” If you do not want to reprompt callers, leave the value 0.

Creat Custom Caller Prompts

You can easily create your own caller prompts by recording the prompt as a greeting using the Strata CS Client or Administrator, then exporting the prompt as a .VOX file into the Call Classifier directory (by default C:\Program Files\Strata CS Call Classifier). When recording a custom prompt, be sure to tell the caller to press # to signify the end of the number (the Call Classifier uses the # only to detect the end of the digit string, and does not include the # in the resulting digit string stored in the field).

Using Custom Database Queries

The Call Classifier can access your existing databases to identify calls and attach information, or transfer callers to different extensions based on the database result. For example, you could compare the incoming caller ID number to all the phone numbers in your contact database. If the caller ID is found, you could then attach information to the Call Notes of the call from that contact record, such as the date and order of the customer's last purchase. The user taking the call would then see that information in the Strata CS Client's Call Monitor, as shown below.



The Call Classifier can query any Microsoft OLE DB supported database, for example Microsoft Access, SQL Server, Excel, Oracle, etc.

A sample database is included with the Call Classifier, that includes U.S. area code and state information. See [“About Sample Configurations” on page 9](#).

Setting up a database query is a two-step process:

- Create Query or Stored Procedure to Search Your Database
- Configure Call Classifier to Use Query or Stored Procedure

Create Query or Stored Procedure to Search Your Database

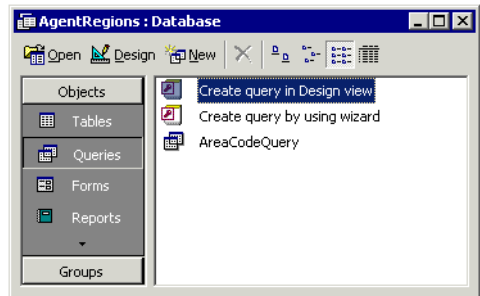
This section describes creating a database query using Microsoft Access, and a stored procedure using Microsoft SQL Server. To create queries using other databases, refer to your database's or Microsoft Access' documentation.

Create Microsoft Access Query to Use with Call Classifier

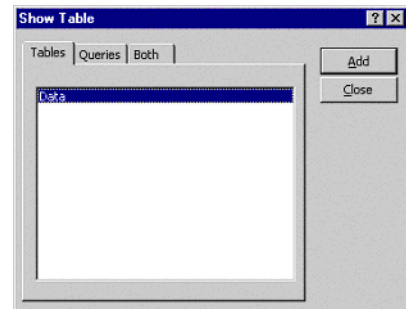
This section shows an example of creating a database Query using Microsoft Access. The example uses the sample Microsoft Access database, Agentregions.mdb, provided with the Call Classifier. It describes creating a database query that receives caller ID number from the Call Classifier and returns the extension to which the call should be transferred. The same Query is used in the sample configuration “Agent routing via area codes.ini” (see [“About Sample Configurations” on page 9](#)).

For more information about using Microsoft Access, see its documentation.

1. Start Microsoft Access. Open the database Agentregions.mdb, located by default in C:\Program Files\Strata CS Call Classifier (shown right)

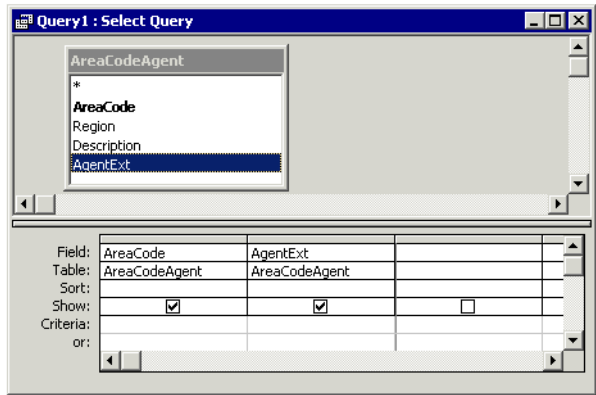


2. Click Queries in the left pane, then double-click Create Query in Design View. The Show Table screen displays (shown right).
3. Using the Show Tables dialog box, add the table AreaCodeAgent to the Query by clicking it and clicking Add. When creating a Query, you must add the table(s) that contain the field with the data to which the information from the call (DID, caller ID, etc.) will be compared, and the field with the results that you want to attach to the call for display.



4. Click Close to close the Show Tables dialog box.

5. Add the necessary table fields to your Query by dragging them from the Table down to a column in the Query display. For this Query, drag the table field AreaCode into the first column, and the table field AgentExt into the second column (shown right). When creating a Query, you must always add the following table fields:

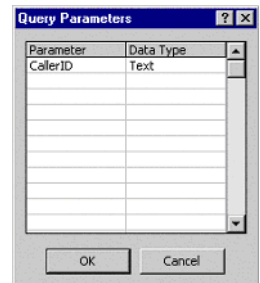


- The one which will be compared to the information from the call in order to find a match (in this example, caller ID sent by the call will be compared to the AreaCode field)
- The one that contains the result you want to send back to the Call Classifier (in this example, you want to send back the AgentExt, the extension of the agent that should handle the call).

6. Now you must define the name of the input parameter. This represents the information sent by the Call Classifier (in this example, the caller ID number).

Note The possible input parameters that the Call Classifier can send are Caller ID name, Caller ID number, DID, Call Notes, and Custom Data.

Choose Query > Parameters. The Query Parameters dialog box opens (shown right).



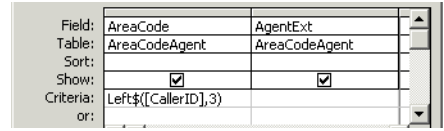
7. Under Parameter, type a parameter name that represents the type of data being sent (in this example, type “CallerID”). The name can be anything you want, but make a note of it, as you will have to enter it into the Call Classifier exactly as entered here. Under Data Type, select Text.

8. Click OK to close the Query Parameters dialog box.

9. In the Criteria cell of the first column, type **Left\$([CallerID],3)**. This command tells Microsoft Access to compare the first three digits of the input

parameter to the contents of the *AreaCode* field. (The first three digits of the input parameter will be the area code of the caller ID number sent by the Call Classifier.)

When entering the Criteria for a Query, always include the name of input parameter surrounded by square brackets. Type the name of the input parameter exactly as you created it in Step 7 (shown right).



10. Save your Query and choose a name for it (in this example, name it “CallerID Query”). If you want, you can compare it to the “AreaCodeQuery,” the sample Query provided with the Call Classifier that performs the same task.
11. Close Microsoft Access.
12. Go to [“Configure Call Classifier to Use Query or Stored Procedure”](#) on page 23.

Create SQL Stored Procedure to Use with Call Classifier

This section describes creating a stored procedure using Microsoft SQL Server. For more information about using SQL Server, see its documentation.

1. Use a tool such as Microsoft SQL Query Analyzer to open your SQL database and add a new stored procedure.
2. Your stored procedure must have a single input parameter, which will correspond to the Caller ID, DID, Call Notes, or Custom Data string being passed by the Call Classifier. The stored procedure must return a named recordset. In the following example, the stored procedure is named `myStoredProcedure`, the input parameter is called `@CallerID`, and the returned recordset field is called `Last Order`.

```
CREATE PROCEDURE myStoredProcedure  
@CallerID as varchar(15)
```

```
AS
```

```
BEGIN
```

```
SELECT TableName.CompanyName + TableName.LastOrder as  
"Last Order"
```

```
FROM TableName
```

```
WHERE TableName.PhoneNumber = @CallerID
```


```
END
```

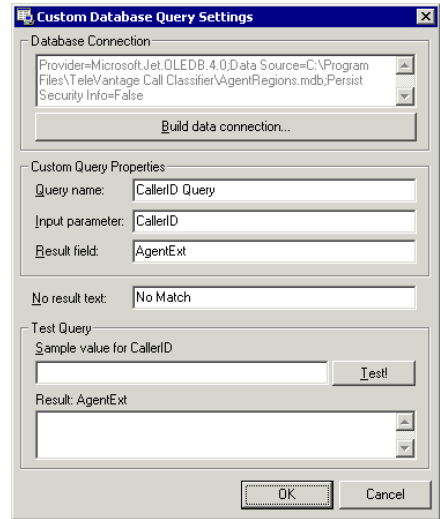
Configure Call Classifier to Use Query or Stored Procedure

To create a Call Classifier rule based on your database query, do the following:

1. In the Call Classifier, click Add. To edit an existing rule, select the rule and click Edit.
2. Use the When drop-down list to select the call field that you want to compare to your database, for example, DID or caller ID. For more information, see [“Add a Rule in Call Classifier” on page 13](#).
3. From the drop-down list just below When, select “Exists in this custom database query” (shown right).

The screenshot shows the 'Add new entry' dialog box. The 'When:' dropdown is set to 'DID'. The second dropdown is set to 'Exists in this custom database query'. The query text box contains 'QUERY: AreaCodeQuery[PhoneNumber = DID]'. Under 'If the call matches, then perform these steps', the 'Change call data:' checkbox is checked, and the dropdown is set to 'Call Notes'. The 'To:' text box contains 'RESULT: Description'. The 'Final action:' dropdown is set to 'Transfer call to extension'. The 'Extension:' text box contains '100'. At the bottom, the 'Clear fields after add' checkbox is checked, and there are 'Add' and 'Close' buttons.

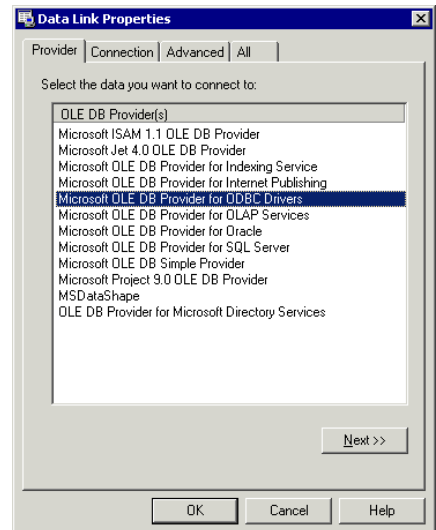
- Click  to open the Custom Database Query Settings dialog box (shown right).



- To select the database to search, click “Build data connection” to open the Microsoft OLE DB Data Link connection Wizard (shown right).

Select the appropriate provider to represent the database your query will search. Use the following guidelines:

- For a Microsoft Access database query, the best selection is Microsoft Jet 4.0 OLE DB Provider.
- For a Microsoft SQL Server database query, the best selection is Microsoft OLE DB Provider for SQL Server.
- If you have another database or are unsure what to select, select Microsoft OLE Provider for ODBC Drivers. This is a generic provider that works with ODBC databases.



6. Click Next to proceed to the Connection tab of the Wizard. This screen is different depending on your selection in the Provider tab. Click Help for assistance on filling out the Connection tab.
7. When the Connection tab is complete, click Test Connection to test the connection to your database.
8. Most users can skip the Advanced tab. Use the Advanced tab only if you are familiar with database permissions.
9. Click OK to close the Wizard and return to the Custom Database Query Settings dialog box.

10. Fill in the Custom Query Properties section (shown right) with the names from your Query or stored procedure. The names must match exactly for the database query to work. The fields are as follows, illustrated by the examples from the previous sections:

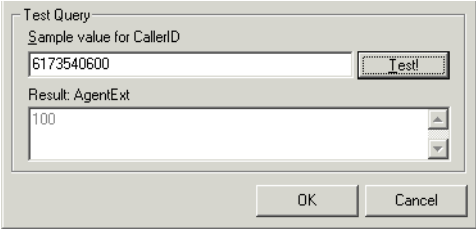


Custom Query Properties	
Query name:	CallerID Query
Input parameter:	CallerID
Result field:	AgentExt
No result text:	No Match

- Query name. Enter the name of your Query or stored procedure.
Microsoft Access example: “CallerID Query”
Microsoft SQL Server example: “myStoredProcedure”
 - Input parameter. Enter the name of the input parameter expected by your query or stored procedure.
Microsoft Access example: “CallerID”
Microsoft SQL Server example: “@CallerID”
 - Result field. Enter the name of the database field that contains the information you want to extract as the result of the query.
Microsoft Access example: “AgentExt”
Microsoft SQL Server example: “Last Order”
11. In the *No result text* field, enter the message that you want to return when there is no match in your database.

12. Test your query by entering a sample input parameter in the *Sample Value for* field and clicking Test! (shown right).

If the test query does not succeed, check that the spelling of the Input parameter and *Result* field is exactly the same in this dialog box as it is in the Microsoft Access Query.



The screenshot shows a dialog box titled "Test Query". It has two main input fields: "Sample value for CallerID" with the value "6173540600" and "Result: AgentExt" with the value "100". A "Test!" button is located to the right of the first field. At the bottom of the dialog are "OK" and "Cancel" buttons.

13. When the test query succeeds, click OK to close the Custom Database Query settings dialog box and return to the Add New Entry dialog box.
14. You can attach the result of the database query to the call, in either the *Call Notes* field or a custom data variable. That is not required for this example, so uncheck Change call data.

If you check Change call data, select either Call Notes or Custom Data. You can select other call fields, but these are the only ones to which you can attach the result of the database query.

To choose Custom Data, you must have already created a custom data variable (see *Strata CS Administrator Manual*). Enter the variable name in Variable. The result of the query will be entered as the value of the variable, so make sure that the variable type matches the expected result. For example, if the database query returns an extension or phone number, a numeric variable would work, but if the database query returns text information, the variable must be of type String.

15. Select the final action to perform on the call. For this example, we want the Call Classifier to transfer the call to the extension returned by the database query, so select "Transfer call to extension (from database)."

For information about the other final actions, see ["Add a Rule in Call Classifier" on page 13.](#)

16. Click OK.

Get Caller Information with ThinkDirectMarketing, Inc.

ThinkDirectMarketing, Inc. (TDMI) provides an online service called DigitalDATA that identifies incoming calls by caller ID and returns the caller's mailing address, along with other profile information. This can be a significant cost-saving feature in call centers where agents traditionally ask each caller for an address and enter it manually, often introducing errors in the process. The Call Classifier features a built-in link to the TDMI DigitalDATA service, enabling subscribers to automatically attach the DigitalDATA response to the call, so that caller address can be viewed immediately by agents and saved with the call. The query and response to DigitalDATA is made almost instantaneously, so that agents have the information by the time they answer the ringing call. The DigitalDATA service fees are applied only when a match is made and an address returned.

To save on fees, the Call Classifier builds a local cache of successful DigitalDATA matches. You can choose to query the local cache first, and query DigitalDATA only if a local a match is not found. This enables you to save the per-match DigitalDATA fee for your repeat callers.

Requirements for Using ThinkDirectMarketing's DigitalDATA

To use ThinkDirectMarketing's DigitalDATA service with the Call Classifier, you must have the following:

- An active Internet connection on your Strata CS Server computer, preferably high-speed.
- A separately purchased license for the DigitalDATA service. See the next section for contact information, or contact your Strata CS reseller.

Contact ThinkDirectMarketing

Before using the Call Classifier with ThinkDirectMarketing, you must purchase a license for their DigitalDATA service. You can contact them as follows:

- Web: www.tdmdigitaldata.com
- E-mail: Digitaldata@thinkdm.com
- Mailing address:

ThinkDirectMarketing, Inc.
470 West Avenue
Stamford, CT 06902

- Phone:
(877) 288-3282 x121
(203) 964-9411 x502
Edward Fleiss, VP DigitalData
- Fax: (203) 978-5872

Register Your Digital DATA License

Once you have purchased a DigitalDATA license from ThinkDirectMarketing, you must register and activate it before you can use it with the Call Classifier. ThinkDirectMarketing will supply you with two 9-digit codes, the Agent ID and Client ID. To register and activate your copy of DigitalDATA, e-mail DigitalData@thinkdm.com or call (203) 964-9411 x502.

Test DigitalDATA Connection

After registering your DigitalDATA license, and before running the Call Classifier, you should test your connection to the DigitalDATA service by using the ThinkDirectMarketing Tester application included with the Call Classifier. The ThinkDirectMarketing Tester lets you type in a sample caller ID number and send it to the DigitalDATA service for identification.

By testing your connection before running the Call Classifier, you can be sure that a failure to connect represents a problem with the DigitalDATA connection.

If you have any problems using the ThinkDirectMarketing Tester, contact ThinkDirectMarketing, Inc. for support. See their contact information earlier in this section. Toshiba cannot troubleshoot problems with the DigitalDATA connection.

► To test your DigitalData service

1. Start the ThinkDirectMarketing Tester by choosing Start > Programs > Toshiba Strata CS > ThinkDirectMarketing Tester.
2. Click the Phone 10 tab (shown right).
3. Use the *Area Code* and *Phone Number* fields to enter a North American phone number. Enter the phone number without hyphens or spaces, because that is how the Call Classifier will send CallerID.

To be sure that the sample phone number is in the DigitalDATA database,

use any valid phone number that is answered by an Auto Attendant or live operator (e.g., your home office phone number).

4. Make sure the Return Type drop-down list is set to Both. The Call Classifier will use this setting to make its queries.
5. Click Search! to test the connection to the DigitalDATA Service. If the connection is successful, caller information appears in the bottom part of the Tester application

window. A successful test means that you are ready to use the DigitalDATA service with the Call Classifier.

Note If there are multiple matches, the Call Classifier will use only the first entry returned.

If the test returns no data, it may be that the number does not exist in the DigitalDATA database. Keep trying with different phone numbers, including the number you used in Step 3 of this procedure. If none of the numbers return data, contact ThinkDirectMarketing for support. See their contact information earlier in this section.

Toshiba does not support troubleshooting the ThinkDirectMarketing Tester application or the DigitalDATA connection.

Attach DigitalDATA Information to Calls

Once you have registered and activated your copy of DigitalDATA, you can set up a Call Classifier rule that attaches DigitalDATA's caller information to calls. For an example of a rule that does this, see the sample configuration "TDMI DigitalData," included with the Call Classifier (see "[About Sample Configurations](#)" on page 9).

► To attach DigitalDATA information to calls

1. In the Call Classifier, create a new rule by clicking Add, or edit an existing rule by clicking Edit.
If you click Add, the Add new entry screen displays (shown right).
2. From the When drop-down list, select CallerID number.
3. From the drop-down list just below, select Exists in the TDMI DigitalData service.

The screenshot shows the "Add new entry" dialog box. Under "Match incoming call", the "When:" dropdown is set to "CallerID number", the second dropdown is "Exists in the TDMI DigitalData service", and the "Search local cache for a match first" checkbox is checked. Under "If the call matches, then perform these steps", the "Change call data:" checkbox is checked and set to "Call Notes", and the "To:" field contains "RESULT: TDMI DigitalData result".


4. The *Search local cache for a match first* field gives you the option of saving money on repeat callers. If checked, the Call Classifier searches a local cache for a match first, and calls DigitalDATA only if a match is not found. The local cache is compiled automatically by the Call Classifier from each successful DigitalDATA query, so it contains a record of all previous DigitalDATA matches. Since your

repeat callers will be in the local cache, the Call Classifier will not call DigitalDATA for them, and you will save on DigitalDATA's per-match fees.

If unchecked, the Call Classifier always calls DigitalDATA to find a match. This option is more expensive but more accurate, because the DigitalDATA service is constantly updated with correct customer information. Your local cache might occasionally return outdated information for a caller.

Note See [“Manage DigitalDATA Cache” on page 33](#) for tips on periodically purging old records from the local cache, so you don't get outdated data over time.

5. The *Change call data* field defaults to Call Notes, meaning the caller information returned by DigitalDATA is attached to the *Call Notes* field of the call. To attach the information to a custom data variable instead, select Custom Data and enter a valid string variable name in the *Variable* field.

To specify how DigitalDATA information appears, click . See the next section, “Present DigitalDATA Information to Agents.”

Note To attach information to a custom data variable, you must have first created the string variable using the Strata CS Administrator. See *Strata CS Administrator Manual* for instructions.


6. Select the final action to perform on the call. See [“Add a Rule in Call Classifier” on page 13](#).
7. Click OK.

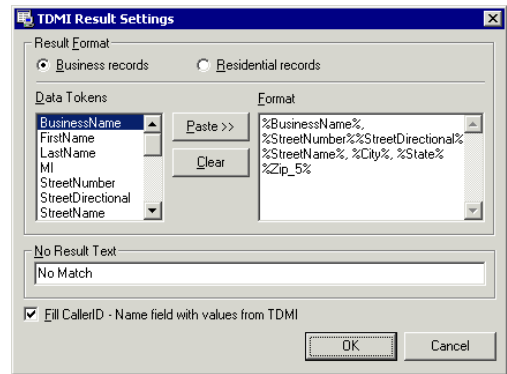
Present DigitalDATA Information to Agents

You can set the format in which DigitalDATA information appears to agents in the Call Monitor. DigitalDATA provides several pieces of information about the caller, including several pieces of address information, that you can arrange in any format you want. You can also provide agents with pre-written scripts by adding your own words to frame the DigitalDATA information. For example, an agent script populated with DigitalDATA information might say, “Thank you for calling, Mr. Jones. How's the weather in Cambridge today?”

You can set separate formats for business and residential records returned by DigitalDATA.

► To set the formats for DigitalDATA information

1. From the Add Item dialog box (see the previous section), click . The TDMI Result Settings dialog box opens (shown right).
2. Click either Business records or Residential records to set the format for that type of DigitalDATA record. You can set different formats for each type.
3. In the *Result Format* field, enter the format of the information the way you want it to appear. The Result Format field functions like a text editor, in which you can type, edit, and delete text. You can type your own call scripts here for agents that incorporate DigitalDATA information.



To insert a piece of DigitalDATA information, select it in the Data Tokens list and click Paste. The information piece is added at the position of the cursor in the Result Format field. Most of the DigitalDATA data tokens are self-explanatory, but the following explanations may be helpful:

- Zip_4. The four-digit zip code suffix.
 - SIC n . The business' Standard Industrial Classification code, which identifies the primary purpose of the business. To look up a business' SIC code, you can use the following U.S. government website: www.osha.gov/oshstats/sicser.html.
4. In the *No Result Text* field, enter the text that appears in the Call Monitor if no match is found for the caller ID number.
 5. To automatically replace the call's incoming caller ID name field with DigitalDATA information, check "Fill CallerID - Name field with values from TDMI." For residential records, caller ID name is set to the DigitalDATA's FirstName and LastName information. For business records, it's set to DigitalDATA's BusinessName information.

If unchecked, incoming caller ID name is left as is, unless modified by another business rule.

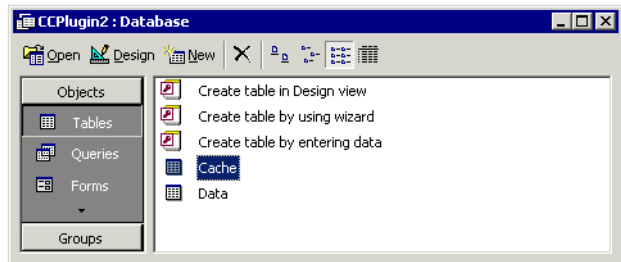
6. When you are finished setting the format, click OK.

Manage DigitalDATA Cache

The Call Classifier maintains a local cache of DigitalDATA results, for the purpose of saving you DigitalDATA fees on repeat callers. Over time the local cache can grow large in size and can also hold outdated information. To edit it for size and accuracy, do the following:

1. Open Microsoft Access.
2. Open the file CCPlugIn.dat, located in the Call Classifier directory (by default C:\Program Files\Strata CS Call Classifier).

3. Click Tables in the left pane to display the list of tables, then double-click the table named Cache (shown right).



4. In the Cache table window, delete outdated records using either of the following methods:

- To automatically delete the oldest records, click Queries in the left pane and double-click the query PurgeCache. You are prompted to enter a cutoff date, and optionally a time. When you run the query all records older than that date and time are purged.
- To manually delete records, select them and choose Edit > Delete Record. For greater ease in selecting older records, click the DateStamp column header to sort the entries by date.

5. When you are finished managing records, save the table and exit Access.

View Call Classifier Information in Call Monitor

For users and agents to view information attached to calls by the Call Classifier, they must have the correct Call Monitor setup in the Strata CS Client, as follows:

- To view Call Notes, make sure the Notes pane is showing by choosing View > Notes Pane. You can also display Call Notes in the Notes column.
- To view the DID field, make sure the DID column is showing.
- To view caller ID number and name, make sure the Number column is showing.
- To view Custom Data, make sure the appropriate Custom Data column is showing. Custom Data items must be defined in the Strata CS Administrator to appear as a Call Monitor column.

To show or hide columns, make sure the Call Monitor is showing, then choose View > Current View > Show Columns.

Route Calls to the Call Classifier

For the Call Classifier to process calls, the Strata CS Server must be set up to route calls to the Call Classifier's extension. This can be done in several ways depending on how you want calls to be managed.

Route All Calls to Call Classifier

In this setup, Strata CS routes all incoming calls to the Call Classifier extension. If a Call Classifier rule is applied to the call, the call is routed according to the settings for that rule. If no rule is applied, the call is routed to your main auto attendant (or any extension you want for unmatched calls). In this way each incoming call will be evaluated by the Call Classifier's business rules that you defined.

For this option, do the following:

1. Route all your trunks to the Call Classifier's extension.
2. In the Call Classifier, make sure the All calls rule transfers calls to your main auto attendant (or any extension you want). See [“Add a Rule in Call Classifier” on page 13](#).

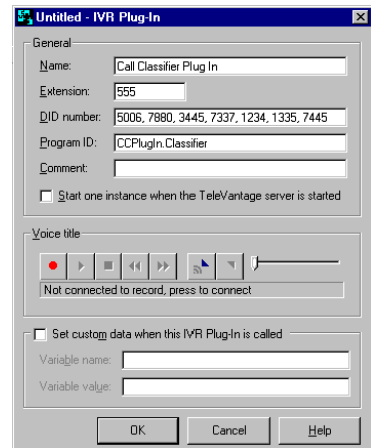
Route Calls Based On Auto Attendant Selection

If a small subset of total incoming calls needs to be managed by the Call Classifier, consider directing only certain calls to the Call Classifier extension by having an auto attendant menu choice transfer calls to the Call Classifier. For example, to evaluate calls that will be handled by a sales group, add a menu choice to your main auto attendant to connect to sales (i.e. “For sales, press 2”). Then, instead of transferring the call to the sales extension, transfer it to the Call Classifier’s extension. The Call Classifier will manage the calls and then transfer them to the sales extension.

Route Calls Based On DID

If you are using the Call Classifier to identify a small number of incoming DID numbers, consider setting up the DID numbers to transfer directly to the Call Classifier. Therefore, these calls will be managed by the Call Classifier without the need for additional auto attendant options or setup within Strata CS. Set this up within the Strata CS Administrator's IVR Plug-in view (shown right) by associating the DID numbers with the Call Classifier IVR Plug-in.

- Enter each DID number in the *DID number* field. Separate DID numbers with commas. When one of the DID numbers is detected by Strata CS, the call will be immediately transferred to the Call Classifier.



Use Multiple Call Classifier Configurations

You can create multiple Call Classifier configurations, and even process a call through multiple configurations. Each configuration can have a different set of business rules and can perform a different database query or DigitalDATA query. Because a single configuration can only perform one database query and one DigitalDATA query, you must use multiple configurations if you want to perform more than one query on a call.

Example: When support calls come in, you want to do a database query based on Caller ID number to see whether the customer is in your database, and attach the

customer record to the Call Notes field. You then want to do another database query that determines their last order date and attaches it to a custom data variable called “Last Order.” You would send calls to one configuration (for example, at x555) for the first database query, then to a second configuration (for example, at x556) for the second database query.

To use multiple Call Classifier configurations, you must do the following:

1. Define each configuration by saving different copies of the Call Classifier .INI file.
2. Register each configuration separately as an IVR Plug-in.

The steps are described in the following sections.

Step 1: Define Multiple Call Classifier Configurations

You define different configurations of the Call Classifier by saving different copies of its .INI file, as follows:


1. Choose File > Save As.
2. Specify a new filename, for example MyCC2.ini.
3. Click Save.
4. Repeat to create as many configurations as you want.

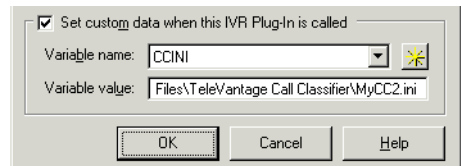
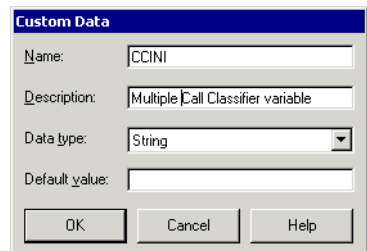
The Call Classifier’s title bar shows the name of the configuration currently loaded. All edits you make, such as defining business rules, apply only to the currently loaded configuration. To switch to a different configuration, choose File > Open and select a different .INI file.

Changes are saved automatically as you work, so you never need to save the currently loaded configuration. Use the File > Save As command only to create new configurations with different names.

Step 2: Register Multiple Call Classifiers as IVR Plug-ins

You must register each different Call Classifier configuration separately as an IVR Plug-in, distinguishing them using a custom data variable called CCINI. To do so:

1. In the Strata CS Administrator, choose File > New > IVR Plug-in.
2. In the General section, enter data as described in [“Register Call Classifier as Strata CS IVR Plug-in” on page 6](#).
3. Check “Set custom data when this IVR-Plug-in is called.”
4. Click . The Custom Data dialog box opens (shown right).
5. Click Add. The next Custom Data dialog box opens.
6. Define the custom data variable as follows:
 - Name. Enter CCINI.
 - Description. Enter a description of the variable.
 - Data Type. Select String.
 - Default value. Leave this field blank.
7. Click OK to close the Custom Data dialog box, then click OK to close the other Custom Data dialog box. You are returned to the IVR Plug-in dialog box.
8. In Variable Name, make sure CCINI is selected.
9. In Variable Value, enter the full path of the .INI file for this Call Classifier configuration. For example, C:\Program Files\TeleVantage Call Classifier\MyCC2.ini (shown right).
10. Click OK.
11. Repeat to create a separate IVR Plug-in for each Call Classifier configuration. For each one, enter CCPlugin.Classifier in Program ID and CCINI in Variable name. Set the Variable value field to the full path of that configuration’s .INI file.



Modify Call Classifier .INI Settings

System settings for the Call Classifier application are defined in the initialization file for the Call Classifier. The file is called CCPlugIn.ini and by default is located in C:\Program Files\Strata CS Call Classifier. You might have multiple .INI files representing multiple configurations of the Call Classifier (see [“Use Multiple Call Classifier Configurations” on page 35](#)).

► To edit Call Classifier .INI file

1. Open the .INI file in the Call Classifier by selecting File > Open.
2. Select Edit > Call Classifier INI file. The file opens in Microsoft Notepad. You can modify the following lines in the [Settings] section:
 - **Transfer.** The extension to which the Call Classifier transfers calls if an unexpected error occurs while processing the call. By default the extension is 8000, the default auto attendant extension.
 - **Logging.** If set to On, the Call Classifier creates a log file that can help with troubleshooting problems. The log file is called DIDLog.txt and is placed in the location listed in LogPath.
3. When all values have been entered, save your changes and exit your text editor.

Troubleshoot Call Classifier

If you encounter problems with the Call Classifier, try the following:

- If you are using custom database queries, test them first using the Call Classifier’s built-in test feature. See [“Configure Call Classifier to Use Query or Stored Procedure” on page 23](#).
- If you are using ThinkDirectMarketing’s DigitalDATA service, test that service to make sure you are connected properly. See [“Test DigitalDATA Connection” on page 29](#).
- Try dialing into the Call Classifier. Remember, if calling from a station, your call should be transferred to the default extension since no DID is present. If calling on a DID number, your call should be transferred to the appropriate extension. If you receive a message “invalid extension” when calling the Call Classifier extension, make sure the Call Classifier is set up as an IVR Plug-in correctly (See [“Register](#)

[Call Classifier as Strata CS IVR Plug-in](#)” on page 6). Also make sure you have enough station licenses to allocate to the Call Classifier.

- Turn logging on in the Call Classifier .INI file by setting Logging to “On” and by setting the LogPath. (See “[Modify Call Classifier .INI Settings](#)” on page 38.) Check the log file to see if any errors are listed.

Index

A

- about this book
 - conventions iii
 - related documents iv
- agent scripting 31
- Agentregions.mdb 11
- All calls rule 9
- area codes database, updating 12

C

- Call Classifier
 - overview 1
 - importing from version 1.0 9
 - INI file 38
 - installing 6
 - licensing for 5
 - main window 8
 - multiple configurations of 35
 - registering as IVR Plug-in 6
 - requirements for 5
 - routing calls to 34
 - sample configurations for 9
 - starting 7
 - troubleshooting 38
 - viewing information in Call Monitor 34

- call progress diagram 4
- caller prompting 16
- configurations
 - included samples 9
 - saving new 35
- custom database queries
 - configuring Call Classifier to use 23
 - overview 19

D

- database queries
 - configuring Call Classifier to use 23
 - overview 19
- DigitalDATA service
 - attaching information to calls 30
 - contact information 28
 - customizing presentation 31
 - local cache, about 27
 - local cache, managing 33
 - overview 27
 - registering license 28
 - requirements for 27
 - testing 29
- documentation iv

I

INI file
 for Call Classifier 38
installation 6
IVR Plug-in, registering Call Classifier as 6

L

license for DigitalDATA 28
licensing 5

M

Microsoft Access query, creating 20
multiple Call Classifiers 35
MyContacts.mdb 10

O

overview 1

P

prompting callers to enter data 16
PurgeCache macro 33

Q

querying a database 19

R

requirements 5
routing calls to the Call Classifier 34
rules
 adding 13
 for all calls 9
 importing from Call Classifier 1.0 9
 ordering 9

S

sample configurations 9
scripts for agents 31
SQL Server stored procedure, creating 22
starting the Call Classifier 7

T

testing DigitalDATA connection 29
ThinkDirectMarketing. *See* DigitalDATA
 service.
troubleshooting 38

V

VOX files for caller prompting 17