NotifyXpress
Testing and Examples

Placing a Test Call

After the NotifyXpress application is installed and configured, a test call can be placed using the Outbound Notification Configuration utility. Placing a test call provides verification that the application mechanics are working properly.

In addition to verifying proper operation, the following procedure can be used to test application settings on an ongoing basis while preparing for an outbound campaign.

To place a test call using the configuration utility:

1) Open the configuration utility.

   - Start->Programs->CallXpress Applications->Outbound Notification Configuration

2) Create and configure a control set for the test.

   - Click on the "Add" button immediately below the control sets listing on the Settings tab.

   - Enter a Control Set ID of TEST.

   - Click on the "Dialog" tab.

   - Uncheck the "Establish Presence" option.

   - Click on the "Defaults" tab.

   - Specify a message by clicking the file selection button to the right of the Message setting box, highlighting the file DefaultMessage.wav, and clicking Open.

   - Specify a machine message by clicking the file selection button to the right of the Machine Msg setting box, highlighting the file DefaultMachineMessage.wav, and clicking Open.

   - Change both the Start Time and End Time values to 12:00 AM so that the test call will be placed as soon as it is scheduled regardless of the time of day.

   - Click on the "OK" button in the Control Set dialog.

   - Click on the "Apply" button in the main utility window.

3) Add the "Control Set" field to the import file fields list. This field must be added to the import fields list to allow the control set for the test call to be specified.

- Click on the "Specify Fields" button contained in the Management section of the Settings tab.

- Locate and click the "Control Set" field in the left-hand list.

- Click on the "Add" button to add the field to the right-hand list.

- Click the "OK" button in the "Specify Import Fields" dialog.

- Click the "Apply" button in the main utility window.

4) Schedule the test call.

- Click on the "Tasks" tab in the main utility window.

- Click on the "Schedule Call" button. The Schedule Outbound Call dialog will open. Fields that are included in the import file fields list will be enabled and can be modified.

- Select the TEST control set using the "Set ID" drop-down list box.

- Enter a telephone number and ID number for the call in the dialog. The telephone number should ring nearby so that it can be answered.

- Click on the "Schedule" button.

- Click on the "Cancel" button to close the Schedule Outbound Call dialog.

5) Answer the test call.

- Make sure the call behaves according to the configured options.

- If machine detection is enabled a machine can be simulated by answering and speaking a lengthy greeting.

- Busy and Ring-No-Answer conditions can also be tested if desired.

6) Review the call results.

- Using Windows Explorer, navigate to the folder specified in the "Call Results Folder" setting in the Management section of the Settings tab.

- Open the results file for the current day using a text editor such as Microsoft Notepad.

- There will be at least two entries for the test call, one showing the call record import and one showing the results of the outbound call. There will be additional entries if other conditions, such as busy or ring-no-answer, have been simulated.

- The application trace file may also be reviewed to determine the series of events generated during the call. For additional information, refer to the "Application Trace Files" topic in the "Monitoring and Troubleshooting" section of the reference guide.

For additional information, refer to the "Control Sets" and "Call Import File" sections of the reference guide.

Examples

The following examples demonstrate various aspects of the NotifyXpress application. To implement the examples the application must be configured as shown, including the import file fields list, and a call import file must be created and copied to the system using the file name and folder as specified in the "Call Import File" setting on the Settings tab of the configuration utility.

Note that the call import file examples provided included dates and times that should be customized to fit the testing environment.

To utilize the example phrases, the phrase files must be copied to the CallXpress Telephony Server while the Automated Agent service is running. The incoming speech folder for the application is:

```
D:\CX\AUTOAGNT\INCOMING\SPEECH\OBOUT
```

When a new phrase is copied to the incoming speech folder, Automated Agent will move the phrase into the production speech folder when it is safe to do so.

NOTE: In the above path specification, the default CallXpress installation folder, D:\CX, is shown. If CallXpress was installed in a different folder, the actual installation folder should be used.

Example 1 – Simple notification message

This example demonstrates a simple notification where a single pre-recorded message phrase is played to all call recipients.

- Calls are allowed to be placed between 9:00 AM and 8:00 PM.

- Answering machine detection is enabled, and the same pre-recorded message phrase is played if a machine is detected.

- Call recipients can choose to repeat the message, but are not given the option of transferring to an operator.

- Default call control settings are modified and utilized instead of a control set.

- Call import file is not used to customize the call dialog for individual call recipients.

Message Phrases

The following pre-recorded phrases are used in this example. The phrase file names start with "01_" so that they can be easily identified with this example campaign.

01_Message .... "Hello, this is the school board calling to remind you of the meeting scheduled for next Friday at 7:00 PM in the school commons. Please plan on arriving fifteen minutes early. We look forward to seeing you there."

01_Menu .... "To repeat this information, press 1. To end this call, press the star key."

01_Closing .... "Thank you. Goodbye."

Call Import File

Because the message and options presented to all call recipients in this example are the same, only two data fields are included in the call import file.

Required fields, in order:

- Recipient ID
- Telephone

Each record in the call import file consists of these two fields, in the stated order and separated by a single comma, as shown below.

```
1001,2065553895
1002,4255550176
1003,9495552989
```

Configuration Settings

In this example, the application call control defaults are modified and utilized. The call control defaults are accessed by clicking the "Edit Defaults" button on the "Settings" tab of the application configuration utility.

The settings listed below are important to the example call dialog. Other settings that are not mentioned are inconsequential.

Control

Answering Machine

Attempt Detection .... Enabled

Dialog

General

Offer Do Not Call List .... Disabled

Presence Verification

Establish Presence .... Disabled

Defaults

Phrases

Message .... 01_Message
Machine Msg .... 01_Message
Menu .... 01_Menu
Closing .... 01_Closing

Call Transfer

Mode .... No Transfer

Calling Period

Start .... 09:00 AM
End .... 08:00 PM

Call Processing

Leave Message .... Enabled

Example 2 – Notification sentence with do-not-call list and multiple call days

This example demonstrates a notification sentence that consists of multiple pre-recorded message phrases, how to use the do-not-call list option, and how to place calls over a span of multiple days.

- Calls are allowed to be placed between 9:00 AM and 5:00 PM over a period of five days.

- Call recipients are divided into two groups, and each group receives a different message and only one of the groups is allowed to transfer to an operator.

- Answering machine detection is enabled, but a message is not left if a machine is detected.

- Depending on the assigned group, call recipients can choose to repeat the message, transfer to an operator, or be added to the do-not-call list.

- Two control sets are used to define two groups of call recipients.

- Call import file is used to specify the group to which each caller belongs and the date range during which calls are allowed.

Message Phrases

The following pre-recorded phrases are used in this example. The phrase file names start with "02_" so that they can be easily identified with this example campaign.

02_Intro ...."Hello, this is a message of interest from XYZ Company."

02_Message1 ...."We are having a special sale for our valued customers next Sunday. All merchandise will be discounted and refreshments will be provided. We hope that you can join us. For more information, please visit our web site."

02_Message2 ...."We are having a special sale for our valued platinum club members next Sunday. All merchandise will be discounted and a platinum club reception luncheon will be held. We hope that you can join us. For more information, please press 2 to speak with a platinum club representative."

02_Menu.............................."To repeat this information, press 1. To be removed from our calling list, press 2. To end this call, press the star key."

02_TransferMenu.................."To repeat this information, press 1. To speak with a customer service representative, press 2. To be removed from our calling list, press 3. To end this call, press the star key."

02_Transfer.........................."Your call is important to us. Please hold for a representative."

02_Closing..........................."Thank you. Goodbye."

Call Import File

Because this example includes customizable control sets and start and end dates, five data fields are included in the call import file.

Required fields, in order:

- Recipient ID
- Telephone
- Control Set
- Start Date
- End Date

Each record in the call import file consists of these five fields, in the stated order and separated by commas, as shown below.

```
1001,2065553895,1,06/22/2007,06/29/2007
1002,4255550176,1,06/22/2007,06/29/2007
1003,9495552989,2,06/22/2007,06/29/2007
```

Configuration Settings for Control Set 1

The control set definition is created by clicking the "Add" button on the "Settings" tab of the application configuration utility. Before configuring the settings, specify a Control Set ID of 1.

This group receives a message sentence consisting of the phrase 02_Intro followed by 02_Message1, and is not offered the option of transferring to an operator.

The settings listed below are important to the example call dialog. Other settings that are not mentioned are inconsequential.

Control

Answering Machine

Attempt Detection .... Enabled

Dialog

General

Offer Do Not Call List.......... Enabled

Presence Verification

Establish Presence .... Disabled

Defaults

Phrases

Message .... 02_Intro 02_Message1
Menu................................... 02_Menu
Closing................................ 02_Closing

Call Transfer

Mode................................... No Transfer

Calling Period

Start......................................09:00 AM
End.......................................05:00 PM

Call Processing

Leave Message ....Disabled

Configuration Settings for Control Set 2

The control set definition is created by clicking the "Add" button on the "Settings" tab of the application configuration utility. Before configuring the settings, specify a Control Set ID of 2.

This group receives a message sentence consisting of the phrase 02_Intro followed by 02_Message2, and is offered the option of transferring to an operator.

The settings listed below are important to the example call dialog. Other settings that are not mentioned are inconsequential.

Control

Answering Machine

Attempt Detection ....Enabled

Dialog

General

Offer Do Not Call List..........Enabled

Presence Verification

Establish Presence ....Disabled

Defaults

Phrases

Message ....02_Intro 02_Message2
Transfer Menu ....02_TransferMenu
Transfer...............................02_Transfer
Closing................................02_Closing

Call Transfer

Mode...................................Prompt
Extension.............................201

Calling Period

Start......................................09:00 AM
End.......................................05:00 PM

Call Processing

Leave Message ....Disabled

Example 3 – Password protected notification sentence with data elements

This example shows a notification sentence that consists of multiple pre-recorded message phrases and data elements, and requires call recipients to enter a PIN before hearing the message.

- Calls are allowed to be placed between 9:00 AM and 8:00 PM.

- Time to start call attempts can be customized for each recipient. Call end time is fixed.

- Message is a payment reminder with amount and date due, and is customized for each recipient.

- Answering machine detection is enabled, but a different pre-recorded message is played if a machine is detected.

- Call recipients can choose to repeat the message or transfer to an operator

- Call control settings are contained in a single control set.

- Call import file is used to specify the control set, PIN, start time and custom message.

Message Phrases

The following pre-recorded phrases are used in this example. The phrase file names start with "03_" so that they can be easily identified with this example campaign.

03_PINPrompt ...."This is the service company calling with a secure message. Please enter your security code, followed by the pound sign."

03_PINInvalid......................"The security code you entered is not correct."

03_Pmt ...."This is a reminder that you have an overdue payment in the amount of…"

03_Due ...."Your payment is due on…"

03_MachineMsg ...."This is the service company calling. We have important information for you concerning your account. Please call us during normal business hours."

03_TransferMenu.................."To repeat this information, press 1. To speak with a customer service representative, press 2. To end this call, press the star key."

03_Transfer.........................."One moment please."

03_Closing..........................."Thank you. Goodbye."

Call Import File

Because this example includes a control set, custom start time, custom message and PIN, six data fields are included in the call import file.

Required fields, in order:

- Recipient ID
- Telephone
- Control Set

- PIN
- Start Time
- Message

Each record in the call import file consists of these six fields, in the stated order and separated by commas, as shown below.

Note that the third record does not contain data in the Start Time field. This means that the call for will be placed as soon as possible during the allowed calling period.

```
1001,2065553895,3,12345,17:00,03_Pmt $25.00 03_Due ~06/27/2007
1002,4255550176,3,54321,17:30,03_Pmt $61.00 03_Due ~06/28/2007
1003,9495552989,3,67890,,03_Pmt $85.50 03_Due ~06/29/2007
```

Configuration Settings

The control set definition is created by clicking the "Add" button on the "Settings" tab of the application configuration utility. Before configuring the settings, specify a Control Set ID of 3.

The settings listed below are important to the example call dialog. Other settings that are not mentioned are inconsequential.

Control

Answering Machine

Attempt Detection .... Enabled

Dialog

General

Offer Do Not Call List .... Disabled

Presence Verification

Establish Presence .... Disabled

PIN Verification

Prompt Phrase .... 03_PINPrompt
Invalid Phrase .... 03_PINInvalid

Defaults

Phrases

Message .... (Blank)
Machine Message .... 03_MachingMsg
Transfer Menu .... 03_TransferMenu
Transfer .... 03_Transfer
Closing .... 03_Closing

Call Transfer

Mode .... Prompt
Extension 203

Calling Period

Start.................................... 09:00 AM
End...................................... 08:00 PM

Call Processing

Leave Message .... Enabled