DialVision Call Center Management For the Web

Troubleshooting and Reference Guide Release 7.5 June 2009

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I. Introduction

This troubleshooting and reference manual is provided as a general guide to some common support issues. Please read through it thoroughly before calling MoonFire support.

II. Error Messages

Login is already on the system; please contact supervisor.

Login is already on the system; please contact supervisor.

A caller may receive this message when trying to log into **DialVision**.

Cause:

This normally occurs when a caller has logged off the Calling Screens improperly by using the "X" in the upper right corner of the window. It can also occur if there was a computer problem and they were bumped off. Managers and System Administrator users will not get this error.

Resolution

To clear this error, Log the caller out.

Clearing a logged in Caller:

 A Manager or System Administrator can log the caller off by going to Callers > Callers (referred to as the Caller Maintenance screen) and manually log off the caller. Select the caller's name and click Logoff User.

Setup Imports Callers Teams Reass	Prospects Ca sign Callers - Shift Reassign (llers Shift Callers - Global Reas	Reports Miscellaneous sign Scripts Manage Outcomes
Login Name:	caller1	Password:	
User Type:	Manager 💌	User Profile:	Manager1
Mac Address Required?	🔿 Yes 💿 No	Active?	⊙Yes ○No
Prefix:		Address Line 1:	
First Name:	caller1	Address Line 2:	
Last Name:	caller1	Address Line 3:	
Suffix:		Address Line 4:	
Phone 1:		Phone 2:	
Employee ID:		Supervisor:	**None Selected**
Date Hired:		Date Terminated:	
Email:	caller1@dv_playground		
Last Login:	5/11/2007 8:58:19 AM	Last Logoff:	5/11/2007 9:05:42 AM
Save Ne	ew Delete	Logoff User	Show Advanced Options Print

• A manager or caller can type **logoff** (*not case sensitive*) in the user name on the blue **DialVision** Login screen, and type the caller's user name in the password field. This will log the caller off and the caller can immediately log back in.

DialVision® 7.0	
DV_Playground	
Enter your login information	n
Username	
LOGOFF	
Password	
•••••I	
Dialing Device	
No Dialing Device	~
Dial Mode	
Preview	~
Device Information:	
Login	

Note: The advantage of this method is that the manager can log the caller off at the caller's computer rather than going back to a manager computer.

Other ways for callers to be logged off:

- Go to Tools > Logoff All Users. Running this option will log all users out.
- When PostShift is run, ALL users are logged off except the user running PostShift.
- After a caller has been logged in for 3 days without activity, *DialVision* will automatically log them off.

Please see the section <u>How to Logoff the Calling Screens</u> for more information on how a caller should correctly log off.

No Prospect list for this caller.



This message appears after the caller has logged in or has just completed a call and clicks **Yes** to take the next call.

Cause:

The most common reasons for this error are: Prospects are not available or Time Zone settings are incorrectly set.

Reasons that Prospects may not be available:

Selections have not been run

Check **Prospects > View Log** to ensure that Selections were run. The most recent selection should not be, "POST SHIFT CLEARED", or "ALL SELECTIONS CLEARED".

Γ	6/9/2009 2:14:58 PM	ALL SELECTIONS CLEARED	ALL SELECTIONS CLEARED	GLOBAL		0
l	6/8/2009 4:14:35 PM	POST SHIFT CLEARED	POST SHIFT CLEARED	GLOBAL		0
l	6/8/2009 4:12:46 PM	1 Alumni prospects	Alumni	GLOBAL	5	1467

Selections were run, but no prospects were selected

Go to **Prospects > View Log** and review the selections to ensure that prospects were selected.

Selections were run, but no prospects are now available from the selections

When reviewing the selection log, it appears that prospects were selected, but the error still occurs. This is because outcomes like Answering Machine, Busy Circuits, Busy Signal, and No Answer, Callback and Recall have Call Again times associated with them.

During a calling session, prospects with these outcomes will count as selected, but will not come up to the calling screens until their Call Back times are reached.

The **Reports > Real Time > Next Call Sequence** Report will display all prospects with future call back times in red.

Selections were run, but the prospects have all been called

Reports > Next Call Sequence will show prospects available to be called

The Caller belongs to a Team which does not have any available prospects

- Check Callers > Teams to see which team(s) the caller belongs to then check Prospects > View Log see if selections were run for the caller's team.
- Review **Reports > Real Time > Next Call Sequence**. Under the **Team** header, ensure that prospects are available for the caller's team.

Time Zone settings

Time Zone Start and Shut Off times:

The Time Zone may not be set to release prospects in that time zone to the calling screens. Check the settings at **Setup > Call Center > Server Start Time > Server Shut Off Time** entries.

There may not be any prospects available in the active time zones

Look at the **Reports > Realtime > Selection totals by Time Zone** report to see if this is occurring.

You are trying to log into the system when there is not an active shift.

You are trying to log into the system when there is not an active shift. Please contact your system administrator if you have any questions.

Return to Login

This occurs when attempting to log into the Calling Screens..

Cause:

There is no active Calling Shift.

Resolution:

- Check **Time Shift Begin** and **Time Shift End** to see if the Shift is Open. A caller trying to login one minute before the shift is set to start or after it ends will receive the error message.
- If the shift is open, ensure that **Manager Shift Only** is not checked for a shift during time when callers should be logged into the system.

Setup Imports	Prospects Caller	rs Shift	Reports	Miscellaneous
Call Center Dataset Car	mpaign List Script Email	Templates		
-				
	Location:	Mead		~
	Day:	Monday	~	
Call Center	Shift #:	1		
Accounts	Time Shift Pegin	6:00	414	
Dialing Devices	Time Shirt begin:	0.00	AM V	
Installment Frequencies	Time Break Begin:	6:01	AM 🔽	
Locations	Time Break Fast	0.00		
Dialing	Time Break End:	6:02	AM 💌	
Shifts	Time Shift End:	11:00	PM 🔽	
MAC Addresses	Hannah Chiff Only			
Payment Methods	Manager Shift Only.	-		
Phone Types Reasons	Save	N 24	ew	Delete
Reason Groups				
Reason Sub Groups				
Reasons				
Relationship Types				

After any change, have the caller logoff to the desktop and log back into *DialVision*.

There are not enough Concurrent Access Licenses to log

you on...

There are not enough Concurrent Access Lincenses to log you on. This system has 1 Concurrent Licenses. Please try again later or contact your system administrator to obtain more licenses. Licenses can be purchased direct from MoonFire at (970) 535-9500.

This message will be displayed on the screen after logging in.

Cause:

This error is displayed when the number of users attempting to log into DialVision exceeds the number of licenses purchased.

Resolution:

If the number of people logged in is less than the number of licenses, then callers have not logged out correctly. Check the **Callers > Callers** menu option to ensure that callers who are not present do not appear as still being logged into the system. Log off any callers who should not be logged in.

If the number of people trying to log in exceeds the number of licenses owned contact MoonFire support to order additional licenses.

The page cannot be displayed.

Internet Explorer cannot display the webpage Idle Internet Explorer cannot display the webpage Most likely causes: You are not connected to the Internet. You are not connected to the address. There might be a typing error in the address. What you can try: Othere might be a typing error in the address. What you can try: Othere might be a typing error in the address. What you can try: Othere might be a typing error in the address. What you can try: Othere might be a typing error in the address. What you can try: Othere might be a typing error in the address. What you can try: Othere might be a typing error in the address. What you can try: Othere might be a typing error in the address. What you can try: Othere might be a typing error in the address. What you can try: Othere might be a typing error in the address. What you can try: Othere might be a typing error in the address. What you can try: Othere might be a typing error in the address. More information Yes
1st: (970) 535 - 9500 123 South Man Street Matching: List: Recent Grad Dono 2nd: (970) 535 - 9500 123 South Man Street Employer: Pepsi-Cola Resume Script: Alumn-Donors 3rd: (970) 535 - 9500 Internet Explorer cannot display the webpage Most likely causes: . . it: (970) 535 - 9500 Internet Explorer cannot display the webpage Most likely causes: . You are not connected to the Internet. . . The website is encountering problems. . . There might be a typing error in the address. .
Ind: (970) 535 - 9500 Apartment 59 Employer: Pepsi-Cola Resume Script: Alumi-Donors Shelbyville, MA 68001 - 5521 Shelbyville, MA 68001 - 5521 Internet Explorer cannot display the webpage Idle Internet Explorer cannot display the webpage Most likely causes: You are not connected to the Internet. The website is encountering problems. There might be a typing error in the address. What you can try: Diagnose Connection Problems More information
3rd: (970) 535 - 9500 4th: (970) 535 - 9500 Internet Explorer cannot display the webpage Most likely causes: • You are not connected to the Internet. • You are not connected to the Internet. • The website is encountering problems. • There might be a typing error in the address. • What you can try: • Diagnose Connection Problems • More information
4th: (970) 535 - 9500 Internet Explorer cannot display the webpage Idle Caling: Last Outcome: spouse Complete Hang Up Done Owner information
Idle Calling: Last Outcome: Spouse Complete Hang Up Done
Calling: Last Outcome: Spouse Complete Hang Up Done Diagnose Connection Problems Source More information
Last Outcome: Spouse Complete What you can try: Hang Up Done Diagnose Connection Problems $\widehat{V}_{\mathcal{K}}$ \widehat{V} More information
Hang Up Done • Diagnose Connection Problems • More information
Hang Up Done
More information [№]
-avorites
Address Call Back
Call History Caller Notes
Pledge Employer
Last Question Rebuttals K
Quick Facts Follow Up 🛛
Send Info Personal Stats Prospect History Financial <u>Info Outcome</u>

This message may be displayed in either the caller's screen or manager's screen.

Cause: The message indicates a lack of connection to *DialVision*. This could be either due to internal network issues or issues with connecting to the internet.

Resolution: SaaS clients: Try connecting to another web site other than DialVision.

- If unable to access another website, the connection to the internet or server has failed and needs to be repaired. Please contact your local It support for assistance.
- If other websites can be accessed, contact DialVision support to ensure that access to the SaaS server is working.

Local clients: Please contact your local IT support for assistance.

The value you entered does not match the previous logon.

Microsof	ft Internet Explorer 🛛 🔀
2	The value you entered does not match the previous logon. Please refresh the page and try again.
	OK Cancel

This occurs when logging into *DialVision*.

Cause: This message appears on the *DialVision* Login screen after logging off as one user name (i.e. Mary) and then trying to login with a different user name (i.e. Jane).

Resolution: Close and reopen Internet Explorer and bring up the login screen. Log in as the desired user.

You do not have permission to login from this machine.

You do not have permission to login from this machine

This message may be received when a caller is trying to log into DialVision.

Cause: The caller has **MAC Address Required** set to **Yes** in Caller Maintenance and the MAC address of the workstation being logged in from does not exist in the **DialVision** MAC Address table.

Resolution: Either Add the MAC address to the *DialVision* MAC Address table (located at **Setup > MAC** Addresses) or set **MAC** Address Required to No for the caller.

Additional Information: Please see <u>How to Implement MAC security in *DialVision* for further information on MAC Addresses.</u>

The original list name on this record has been changed...



This error message appears when changing list names.

Cause: This error message is a warning in case the manager did not mean to change the name of an existing list.

Additional Information: The list name is used for historical reporting purposes. Thus, to avoid reporting issues, Managers will typically want to create a new list rather than reuse an old list.

III. How To's

How To Logoff the Calling Screens

Follow this sequence to successfully log off the calling screens:

- 1. Click **Done** in the left side dialing pane.
- 2. Apply the outcome and click **Save**.

Address Primary: (970) 535 - 9500	Mr. Kurt Morgan Mrs. Sarah Morgan P.O Box 281 Padnia, CO 81428 Outcome Call Back Select Outcome	Email: Prospect: 10:19 AM Mo Matching: Employer: H & H Account Follow Up Send Info Call	Dataset: Annual Fund untain Campaign: SPRING 07 List: Business School ting Resume Script: Donor Script Business
Idle Calling: Last Outcome: Hang Up Done	Outcome Ans Machine Appointment Busy Circuits Busy Signal CallBack Considering Day Call Dialing Error Disconnected Fax/Modem Language Barrier No Answer Recall Reschedule Wrong Number Virong Number	Total Dollars Ple Call Back Date &	dge: \$ 0.00 k Time:
Favorites Quick Facts Rebuttals Send Info Call Back	Save		
	Prospect	History Financial	Info Outcome

3. On the screen that says "Do you wish to take the next call?", Click No

Do you wis	h to take the next call?
Yes	
No	
Prospect Search	

This will exit *DialVision* and return to the login screen where Internet Explorer can be closed.

How To Delete Setup Items in *DialVision*

Setup items, such as Callers, Teams, Lists, Datasets or Selections cannot be deleted if they have been used in DialVision.

The following message will appears when trying to delete a used item:

This record is in use elsewhere in the system. All related records must be deleted or edited before continuing.

To resolve this set the Active flag on the item to No. This will inactivate the item.

Password:	
User Profile:	**No Selection**
Active?	◯Yes ⊙No
Address Line 1:	Le la

How To Implement MAC Security in Dialvision

MAC Address security only allows *DialVision* access from computers with specified MAC addresses. When using this feature, be sure to get the MAC address for any home PC or laptop that will be accessing *DialVision*.

1. Obtain MAC Addresses

Use the document 'How to Find a MAC Address_v7.5.doc" to identify the MAC Address for each workstation needing to access *DialVision*

- 2. Go to Setup > Call Center > MAC Addresses.
 - Enter the 12 characters of the MAC address in groups of two. Save the address, and select **New** to enter the next address.

Setup Imports Prospe Call Center Dataset Campaign	cts Callers List Script Email Te	Shift R mplates	eports Misc	ellaneous	Tools Hel	p Logoff
Call Center Accounts Countries Dialing Devices Installment Frequencies Locations Dialing Local Exchanges Shifts MAC Adversars Payment Methods Phone Types Reasons Reasons Reason Sub Groups Reasons Reasons Sub Groups Reasons Reasons Relationship Types Reasons Relationship Types Reasons Relationship Types Resorts Standard Dialing Outcomes Time Zones Datasets	1st Octet: 2nd Octet: 3rd Octet: 4th Octet: 5th Octet: 6th Octet: Save	þ0 14 22 38 3A OF New	Dele	ete		
	1st Octet	2nd Octet	3rd Octet	4th Octet	5th Octet	6th Octet
	00	02	2d	92	dc	83
	00	14	22	38	3A	OF

 Next, go to the Caller Maintenance screen (Callers > Callers) and check the Yes radio button next to MAC Address Required? for each caller that should have their MAC address verified when logging into *DialVision.*

Setup Imports Callers Teams Reass	Prospects	Callers Shift on Callers - Global Reas	Reports Miscellaneous
Login Name:	caller1	Password:	
User Type:	Caller 🗸	User Profile:	Caller
Mac Address Required?	⊙Yes ○No	Active?	🔿 Yes 💿 No
Prefix:	4	Address Line 1:	
First Name:	caller1	Address Line 2:	
Last Name:	caller1	Address Line 3:	
Suffix:		Address Line 4:	
Phone 1:	()	Phone 2:	
Employee ID:		Supervisor:	**None Selected**
Date Hired:		Date Terminated:	
Email:	caller1@dv_playground		
Last Login:	5/11/2007 8:58:19 AM	Last Logoff:	5/11/2007 9:05:42 AM

Note: MAC addresses are specific to each computer. If a MAC Address Required Caller is not using a registered computer they will be unable to access **DialVision**.

How To Recover Fulfillment Files

Create a Fulfillment file capturing data since the last post shift: Fulfillment files are defined either at the Dataset > Outcomes screen or Dataset > Send Information screen.

• Any Send Information entry that has a value entered in **Document Names** will be in the Fulfillment file.

	Dataset: Parents (da	Dataset: Parents (dataset)			
R	Description:	Send infor on Math Club			
Datasets Appointment Detail	Document Name:	MathClub			
Caller Buttons	A	0			
Custom Follow Un	Active?	💌 Yes 🔘 No			
History Info	Save	New	Delete		
Outcomes					
Payment Methods Personal Stats		Description			
Post Shift Rules	Send infor on Math Cl	Send infor on Math Club			
Post Shift Files					
Post Shift Outcomes					
Quick Facts					
Rebuttals					
Send Information					
Campaigns					

• At **Dataset >Outcomes** any outcome that has a value entered in **Document** will be in the Fulfillment file.

Setup Imports Pro Call Center Dataset Campaign	ospects Callers List Script Email Ter	Shift Reports Miscellaneous nplates
	Dataset: 2009 Dataset	
	Outcome Description:	Disconnected
Datasets	.	
Appointment Detail	Outcome Type:	Positive O Negative O Other
Custom	Document:	Disconnected
Follow Up History Info	Contacted:	◯Yes ④No
Outcomes	Decision:	○Yes No

If the files are accidentally lost, damaged or misplaced, they can be recovered by following the subsequent steps.

1. Under **Reports > Codes > Outcomes (Detail),** run the Outcome Code Listing Report.

Setup Imports Pro Codes Custom History Pro	ospects ospects Realtin	Callers ne Scripting C	Shift Reports aller Activity Dashboa	Miscellaneous rd Next Call Sequence	Tools Create Survey File	Help Logoff	l
	Dataset Glo	bal 💌				View F	Report
Codes	∎ 4 4	of 18 🕨 🕨	100%	Find Next	Select a format	🗙 Export 🔹	3
Accounts	Outco	omes					
Area Codes Call Center Information	Dataset	Code / ID	Description	Туре	Document	Function	Rea
Caller Function Listing	Alumni	12	Refusal	Negative			Refu
Caller Information (Detail)		Att	ributes	Post Shift Rul	es File Name	Include in File?	Exp
Campaigns		Contact	? Yes	File 1:	Piedaes	Yes	
Countries		Decision	? No	File 2:	Refusals	No	
Credit Card Dataset		Processed	1? No	File 3:	BadPhoneNumbers	No	
Dataset (Summary)		Validation Amoun	it: Zero	File 4:		No	
Follow Up		Note Validation	? Yes	File 5:		No	
Lists	Tos	s Survey Responses	2 No.	File 6		No	
Local Exchanges		Quick Result	2 No	File 7		No	
Locations Outcome Reasons		Read Only Result	2 No	File 8		No	
Outcomes (Detail)		Priority Overrid	a.	File 9:		No	
Outcomes (Summary)		Phoney overhu	.	File 40		No	
Payment Methods				Phone Evoluei	ion	No	
Phone Exclusion List				Phone Exclusion	ion.	No	
Reasons Report				ruige.		100	

Note: The Number and the Document columns contain values which are the CallResultID's which have Documents attached to them. These values will be used in the **Generate Fulfillment file** selection statement.

- 2. Under Shift > Create Fulfillment File, enter the desired information. To have all documents recreated, select Reprints and Unprinted Documents.
- Enter the email address where the fulfillment file should be sent (if *DialVision* has been setup for emailing).

Setup Imports Prospects Callers Shift Approve Accounts Approve Caller Notes Approve Emails Create Fulfill	t Reports Miscellaneous ment File Make Calls Post Shift
Create Fulfillment File	
Include Only	
Caller	**GLOBAL**
Team	**GLOBAL**
File Name (do not include a file extension)	
A filename cannot contain any of the following characters: \ / : * ? "	< >
O Unprinted Documents Only	Reprints and Unprinted Documents
Please enter an email address if you would like to receive the file v	ia e-mail.
Create Fulfillment File Download File	
ц.	

- 4. Click Create Fulfillment File.
- 5. Use the **Download File** option to download the file to a local workstation.

Note: Fulfillment files are stored in the Fulfill folder as a WP (word processing file).

Cipy Company Com					
		Name 🔺	Size	Туре	Date Modified
and Folder Tasks	۲	WPOutput2004-8-18-14-48-58	3 KB	File	8/18/2004 2:49 PM
Make a new folder					

Generating a Fulfillment File for Past Prospects:

- 1. Identify all needed Outcome IDs and Dataset IDs using the steps provided above.
- 2. Go to Prospects > Purge, set Operation to perform: to Generate Fulfillment File Past Prospects.
- 3. In File Name: enter a name for this file.

Operation to perform:	File Name:
Generate Fulfillment File - Past Prospects 🛛 💟	LostFulfillmentFile

4. In Selection Criteria enter the following text:

Operation to perform:					
Generate Fulfillment File -	Past Prospects 💦 💊	*			
Selection Criteria:					
Datepart(month,ps.zdatecallresult) = 08 and Datepart(day,ps.zdatecallresult) = 20 and Datepart(year,ps.zdatecallresult) = 2004 and ps.zCallresultid in (10, 2) and cr.zdatasetid = 51					
2 Records Exported					
Run	Validate				

Note: For multiple datasets use the 'in' SQL statement: IE. cr.zdatasetid in (51, 59)

- 5. Change the date parameters to the day for which to recover the fulfillment file.
- 6. Click Run.

Note: This will create a fulfillment file for all the outcomes which have documents attached for a specific date.

Re-Create Send Info Fulfillment File

1. For any prospects with Send Info, enter the following text in Selection Criteria:

Operation to perform:					
Generate Fulfillment File - Past Prospects 🛛 🗸					
Selection Criteria:					
Datepart(month,ps.zdatecaliresult) = 08 and Datepart(day,ps.zdatecaliresult) = 4 and Datepart(year,ps.zdatecaliresult) = 2004 and len(si.zdocument)> 0 and si.zdatasetID = 51					
No Errors					
Run	Validate				

- 2. Change the date parameters and datasetID as needed to recreate the Send Info fulfillment file.
- 3. Click Run.

Note: This will create a file in the Fulfill folder for all prospects that have a 'send information' request during on the specified date.

IV. Troubleshooting

The Pledge Outcome Drop Down box has incorrect options



Cause:

If there are incorrect outcomes in the list box after entering a financial transaction it means that nonfinancial outcomes have the **Validation Amount** field set to something other than **Zero** at the **Setup > Dataset > Outcomes** screen.

Setup Imports P Call Center Dataset Campaig	rospects Callers n List Script Email 1	s Shift Reports Misc emplates
	Dataset: Alumni	
Datasets	Outcome Description:	Refusal
Appointment Detail	Outcome Type:	O Positive Negative Other
Caller Tabs Custom	Document:	
Follow Up History Info	Contacted:	Yes ○ No
Outcomes	Decision:	⊙Yes ○No
Payment Methods Personal Stats	Processed:	◯Yes ⊙No
Post Shift Rules Post Shift Files	Validation Amount:	Zero Greater Than Zero Either
Post Shift Dataset Post Shift Outcomes	Note Validation:	€ Ves ○ No

Note: In the above example Ans Machine was set to Greater than Zero or Either.

Resolution: Go to the problematic outcome and set the Validation Amount field to Zero.

The Pledge Outcome Drop Down box is blank

	Select Outcome Code
R	Update Outcome for Spouse
Save	Total Dollars Pledges/Gifts: \$ 100.00
	Call Back Date & Time:

Cause: If a caller is seeing an empty drop down box for the **Select Outcome Code** screen after saving a pledge, the pledge outcome has the **Validation Amount** set to something other than **Greater Than Zero**.

Resolution: Under **Setup > Dataset > Outcome** bring up the **Pledge** outcome and ensure it is set to **Greater Than Zero**.

Missing Refusal Reasons

A Caller tries to add Reasons to the Refusal Outcome but they are missing.

Resolution: There are four main items to check when callers do not see refusal reasons. Number one is generally the most common reason; Refusal Reasons do not appear.

1. All desired refusals reasons must be checked under **Setup > Dataset > Reasons**

etup Imports Pro Call Center Dataset Campaign	ospects List Scrip	Callers Shift Reports Miscell t Email Templates	aneous Tools H	elp Logoff
	Dataset: Alu	mni		
	Allow Use	Reason	Reason Sub Group	Reason Group
Datasets Image: Construction of the sector	V	Already been called	Miscellaneous	Refusal
		Already gave to this program	Already Gave	Refusal
	✓ ¹	Alumni Association	Already Gave	Refusal
	V	Back in School/Still in School	No Money	Refusal
	~	Death in the family	Miscellaneous	Refusal
	V	Deceased	Miscellaneous	Refusal
		Dinner/Guests/Too busy	Miscellaneous	Refusal
		Divorce	No Money	Refusal
	V	Does not support U	Miscellaneous	Refusal
		French		Languages

2. Check to see if refusal codes have been entered in **Setup > Call Center > Reasons**.

Setup Imports Prosp Call Center Dataset Campaign	ects Caller List Script Email	rs Shift Templates	Reports	Miscellaneous	Tools
	Reason Code: Description:	306 Giving on the	eir own		
Call Center Accounts Countries Dialing Devices Installment Frequencies Locations Dialing Locat Exchanges	Group: Sub Group:	Refusal Already Gav	• •		
	Save	Ne	ew	Delete	Print
Shifts	301	Already gave to th	is program	Alread	iy Gave
MAC Addresses Pavment Methods	302	Gave to other prog	rams at the U	Alread	iy Gave
Phone Types	303	303 Alumni Association		Alread	iy Gave
Reasons Reason Groups	305	Giving through the	mail	Alread	iy Gave
Reason Sub Groups	306	Giving on their ow	n	Alread	ly Gave
Reasons Relationship Types	307	Supports in other v	ways 💟	Alread	ty Gave

3. Verify that the Refusal outcome does not have the Refusal Reason code selected in **Reason Group**.

Setup Imports P Call Center Dataset Campaigu	rospects Callers n List Script Email Te	Shift Reports Mise emplates
	Dataset: Alumni	
Datasate	Outcome Description:	Refusal
Appointment Detail	Outcome Type:	O Positive Negative O Other
Caller Tabs Custom	Document:	
Follow Up	Contacted:	Ves No
Outcomes Payment Methods	Decision:	
Personal Stats	Processed:	Yes No
Post Shift Rules Post Shift Files	Validation Amount:	
Post Shift Dataset	Note Validation:	Yes ○ No
Quick Facts Reputtals	Toss Survey Responses:	OYes ⊙No
Reasons	Function:	**None Selected**
Send Information Campaigns	Rapid Result?	OYes ⊙No
	Read Only Result?	○Yes
	Reason Group:	Refusal
	Active?	⊙Yes ◯No

- 4. Check to see that the Refusal Reason Sub Group has been created in **Setup > Call Center > Reason Groups**.
- 5. Having a Reason Sub Group is optional so this is most likely not a problem.

Setup Imports Prosp Call Center Dataset Campaign	ects Callers List Script Email Te	Shift R emplates
	Reason Group:	Refusal
Call Center Accounts Countries Dialing Devices Installment Frequencies Locations Dialing Local Exchanges Shifts	Save	New
MAC Addresses Payment Methods Phone Types Reasons Reason Groups Reason Sub Groups Reasons	Dialing Errors Languages Refusal	

Notes On Callbacks and Reschedules

Callback and Reschedule outcomes act in specific ways.

Callbacks were designed to be used when a decision is pending by the prospect. Callbacks usually return to the original caller. The pitch has been given to the prospect but the prospect did not have adequate time to make a decision and requested the caller call them back at a specified time. A specific Callback time and date is noted for the prospect. The Callback can be later during the same shift or sometime in the future. Caller notes are keyed about the call for the caller to review before the call back.

- Callbacks follow time zone rules. A prospect cannot be called outside of time zone shut off times
- Based on the settings, callbacks can "build up" and soon the callers are only calling prospects with an outcome of Callback instead of penetrating the list.
- **Callers > Manage Outcomes** can be used to change the outcome, assigned caller, priority or Team for any call, including call backs

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 Depending upon the settings, once a prospect is marked with the Callback outcome, if the subsequent outcome is Answering Machine, Busy, Busy Circuits, or No Answer, the call history for the prospect will show as Callback. The next call time will be determined by the value in Setup > Standard Dialing Outcomes for the most recent outcome.

Reschedules are designed to identify the next time this prospect should be called. Usually the pitch has not been given yet; it is just an anticipated time to call the prospect back. Perhaps the prospect told the caller they are going out and need to be called at a specific time. The rescheduled time could be during the same shift or on a different day. Reschedules are **not** assigned to the original caller.

A **Recall** outcome is used when the prospect has not been pitched. The prospect is called only once during a shift and will be re-called on another day.

Incomplete Transactions

Under **Tools > Incomplete Transactions** records will show on this menu option when a caller is talking to a prospect or if the caller logged out incorrectly and left the prospect record open.

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This option is provided so the manager can quickly find which prospect needs to be completed.

Note: It is important that the manager not access a prospect records when the caller and prospect are in current conversation. If this occurs, the same prospect record may appear upon multiple callers' screens as they end their calls and try to take the next call.

Using the information from this option, a Manager can complete a prospect record. The outcome the Manager applies in **Prospect Maintenance** will determine what happens to the prospect the next time post shift is run.

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If Post Shift is run before the prospect record can be completed using Prospect Maintenance, the prospect remains in the calling pool until it is selected to be called again.

Error when clicking the *DialVision* icon, I can't get to *DialVision*

Before calling MoonFire:

1. Go to another Internet site, like <u>CNN.com</u> or <u>Yahoo.com</u> from a caller machine. This will confirm that the Internet is working. If the machine is unable to go to another Internet site, contact the Internet Service provider not MoonFire.

2. If the "This page cannot be displayed" message occurs when logging on, please scroll down to the middle of the page and provide MoonFire support with a copy of **Technical Information (for support personnel)**.



3. If there is no message in bold, scroll to the end of the page and look for the message "Cannot find server or DNS error".

For this error

- Check to make sure the URL is typed correctly; re-key if incorrect.
- Check that the cables to all the machines are tight.