# DialVision Call Center Management <br> For the Web 

Troubleshooting and Reference Guide<br>Release 7.5<br>June 2009

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## Troubleshooting and Reference Guide

## 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.

- 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.


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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 How to Logoff the Calling Screens for more information on how a caller should correctly log off.

## No Prospect list for this caller.

```
No prospect list for this caller.
    $
    Return to Login
```

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".

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

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## 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.



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.


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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.

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## The page cannot be displayed.



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.

Microsoft Internet Explorer


The value you entered does not match the previous logon. Flease refresh the page and try again.


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).

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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 How to Implement MAC security in DialVision for further information on MAC Addresses.

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

```
Microsoft Internet Explores
? The original list name on this record has been changed from test part 3 to test part 2 . Are you sure you want to save this record?

> \begin{tabular}{l|l}  OK & Cancel \end{tabular}

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.

\section*{Troubleshooting and Reference Guide}

\section*{III. How To's}

\section*{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.

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


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

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\section*{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.
\begin{tabular}{|ll|}
\hline Password: & \(\square\) \\
User Profile: & No Selection** \\
Active? & Yes © No \\
Address Line 1: & \\
\hline
\end{tabular}

\section*{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.


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3. 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.


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.

\section*{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.
\begin{tabular}{|c|c|c|c|c|}
\hline  & \multicolumn{4}{|l|}{Dataset: Parents (dataset)} \\
\hline & Description: & & \multicolumn{2}{|c|}{Datasets Description: Send infor on M} \\
\hline \multicolumn{5}{|l|}{Appointment Detail Document llame: MathClub} \\
\hline Cusiler Butions & Active? & ()Yes Ono & & \\
\hline \multicolumn{5}{|l|}{Follow Up} \\
\hline \multicolumn{4}{|l|}{Historylmfo Save} & \\
\hline \multicolumn{5}{|l|}{Outcomes} \\
\hline \multicolumn{5}{|l|}{Payment Methods} \\
\hline Personal Stats & & Descripti & & \\
\hline & Send infor on Ma & & & \\
\hline \multicolumn{5}{|l|}{Post Shift Files \(\quad\) Send infor on Math Club} \\
\hline \multicolumn{5}{|l|}{Post Shift Dataset} \\
\hline \multicolumn{5}{|l|}{Quick Facts} \\
\hline \multicolumn{5}{|l|}{Rebuttals} \\
\hline \multicolumn{5}{|l|}{Refusals} \\
\hline Senflinformation & & & & \\
\hline Campaigns & & & & \\
\hline
\end{tabular}

\section*{Troubleshooting and Reference Guide}
- At Dataset >Outcomes any outcome that has a value entered in Document will be in the Fulfillment file.



Datasets
Appointment Detail
Caller Tabs
Custom
Follow Up
History Info
Outcomes

Dataset: 2009 Dataset

Outcome Description:
Outcome Type:
Document: \(\longleftarrow\)
Contacted:
Decision:

\section*{Disconnected}
- Positive \(\bigcirc\) Negative \(\bigcirc\) other

\section*{Disconnected}

Oyes \(\odot\) No
○Yes © \({ }^{\text {No }}\)

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.


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.
3. Enter the email address where the fulfillment file should be sent (if DialVision has been setup for emailing).

\title{
Troubleshooting and Reference Guide
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\begin{tabular}{|c|c|c|c|c|c|c|}
\hline Setup & Imports & Prospects & Callers & Shift & Reports & Miscellaneous \\
\hline Appr & ounts | A & aller Notes & is & & | Mak & Post Shift | \\
\hline
\end{tabular}

\section*{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: \(\backslash /\) : * \({ }^{\text {" }}<>\) |
Unprinted Documents Only
Please enter an email address if you would like to receive the file via e-mail.
\(\square\)

\section*{Create Fulfillment File} Download File
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).
\begin{tabular}{|c|c|c|c|c|}
\hline \multicolumn{5}{|c|}{ilidicompanydemo4Server', Fu} \\
\hline & Name - & Size & Type & Date Modified \\
\hline and Folder Tasks 숫 & (0) WPOutput2004-8-18-14-48-58 & 3 KB & File & 8/18/2004 2:49 PM \\
\hline Make a new folder & & & & \\
\hline
\end{tabular}

\section*{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.

4. In Selection Criteria enter the following text:

\section*{Troubleshooting and Reference Guide}
\begin{tabular}{|l|}
\hline Operation to perform: \\
\begin{tabular}{|l|}
\hline Generate Fulfillment File - Past Prospects \\
Selection Criteria:
\end{tabular} \\
\begin{tabular}{l} 
Datepart(month,ps.zdatecallresult \()=08\) and \\
Datepart(day.ps.zdatecallresult) \(=20\) and \\
Datepartyear,ps.zdatecallresult \()=2004\) and \\
ps.zCallresultid in \((10,2)\) and \\
cr.zdatasetid \(=51\)
\end{tabular} \\
2 Records Exported \\
\(\quad\) Run \\
\hline
\end{tabular}

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.

\section*{Re-Create Send Info Fulfillment File}
1. For any prospects with Send Info, enter the following text in Selection Criteria:
\begin{tabular}{|l|l|}
\hline \begin{tabular}{l} 
Operation to perform: \\
\hline Generate Fulfillment File - Past Prospects
\end{tabular} \\
\begin{tabular}{l} 
Selection Criteria:
\end{tabular} \\
\begin{tabular}{l} 
Datepart(month,ps.zdatecallresult) \(=08\) and \\
Datepart(day,ps.zdatecallresult) \(=4\) and \\
Datepart(year,ps.zdatecallresult \()=2004\) and \\
len(si.zdocument) \(>0\) and \\
si.zdatasetID \(=51\)
\end{tabular} \\
\begin{tabular}{ll} 
Ho Errors
\end{tabular} & \\
\hline
\end{tabular}
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.

\section*{Troubleshooting and Reference Guide}

\section*{IV. Troubleshooting}

\section*{The Pledge Outcome Drop Down box has incorrect options}
\begin{tabular}{|c|c|}
\hline & Select Outcome Code \\
\hline \begin{tabular}{l}
Ans Machine \\
Pledge \\
Refusal
\end{tabular} & Total Dollars Pledges/Gifts: \$ 100.00 \\
\hline Save & Call Back Date \& Time: \\
\hline
\end{tabular}

\section*{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.


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.

\section*{The Pledge Outcome Drop Down box is blank}


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.

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\section*{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

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

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

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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.


\section*{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

\title{
Troubleshooting and Reference Guide
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\begin{tabular}{|c|c|c|c|c|c|c|}
\hline Setup & Imports & Prospects & Callers & Shift & Reports & Miscellaneous \\
\hline Callers & eams | R & Callers - Shift & Callers & & Scripts & Miscellaneous
Outcomes | \\
\hline
\end{tabular}

between:
That have belonged to the

\section*{caller for:}

\(\square\) Having blank Caller
Notes?

> Search

- 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.

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\section*{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.


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.


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.

\section*{Error when clicking the DialVision icon, I can't get to DialVision}

Before calling MoonFire:
1. Go to another Internet site, like CNN.com or Yahoo.com 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.

\section*{Troubleshooting and Reference Guide}
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).
```

Technical Information (for support personnel)
- Error Type:
ADODB.Command (0x800A0D5D)
Application uses a value of the wrong type for the current
operation.
/DialYisionDemo/Manager/Setup/DataSet/ProductInfoData.asp,
line 38

```
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.```

