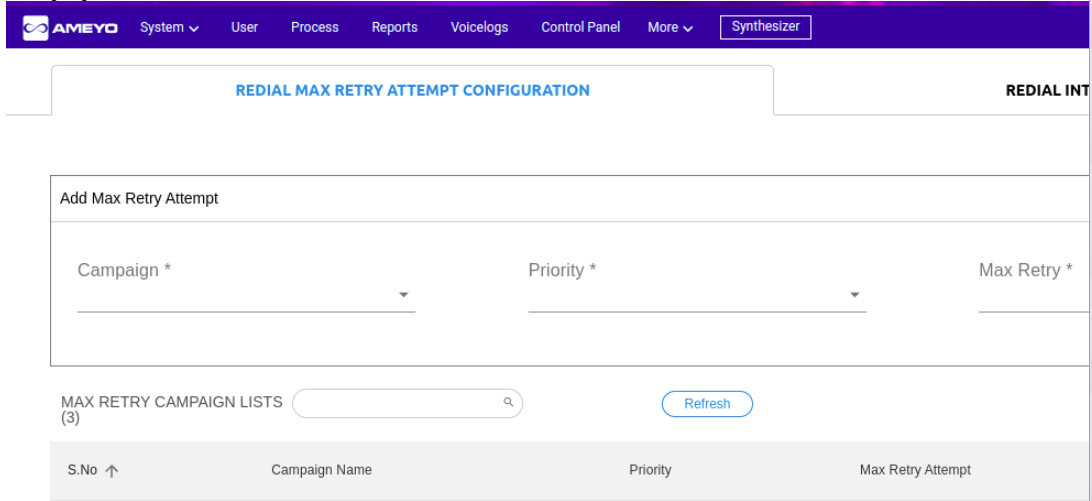
Module :-

1. **Max Retry Module:-**

-> This Module used to set the maximum attempt of non- connecting Auto Call on the basis of Priority and campaign. This module will be used for only Auto Dial.



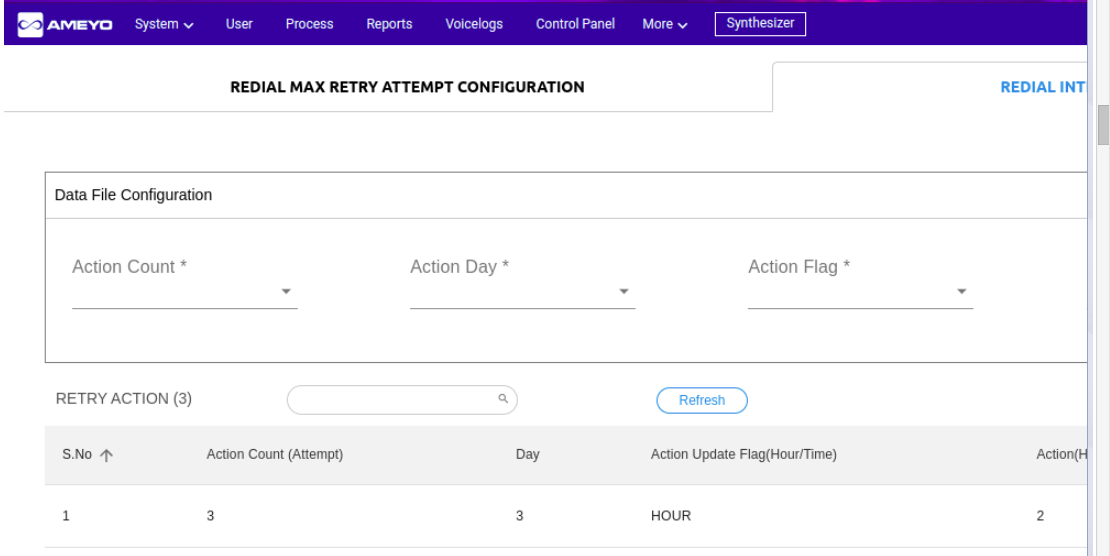
Eg:- Campaign\_name | Priority | Max\_Attempt

Mumbai\_Priority2 |2 | 5

Based on the above data record the customer of campaign mumbai\_priority2 with priority 5 will be dialed 5 times through Auto Dial.

1. **Retry Interval Module**

-> This Module used to set the retry time of Auto non- connected Calls.This module will be used for only Auto Dial.



Suppose dialed time of any call is "2023/07/01 12:00:00 +0530";

Eg:- Action\_Count | Action\_Day | Action\_Flag| Retrt\_Time

2 | 1 | TIME |00:25:00

3 |2 | Hour |01:00:00

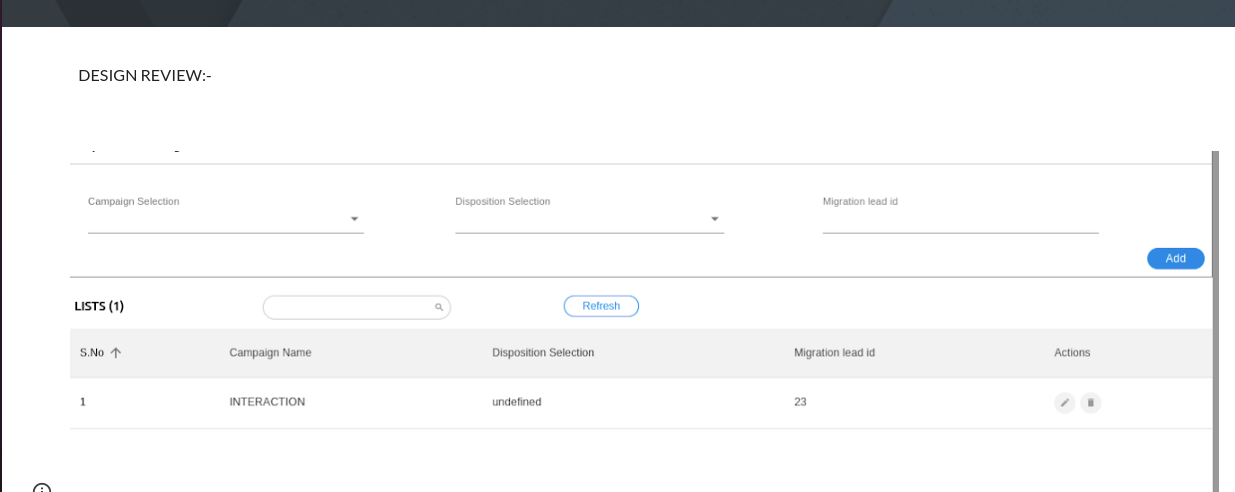
Action count is attempt of call(for auto dial we are counting attempt value)

a.Based on the first above data record the second attempt of a non-connected customer will be dialed on the same day (day 1) after 25 minutes through Auto Dial.

b. Based on the second above data record the third attempt of a non-connected customer will be dialed on the second day (day 2) 1 PM through Auto Dial. dialtime update

1. **Lead Migration Module(disposition\_config module):-**

Customer upload via salesforce in ameyo through CM API in New lead. This module migrates customers from New lead to Score lead on the basis of user disposition.



Eg:- Campaign\_name | Disposition Selection | Migration Lead id

Lucknow\_HSPL | Follow up\_Callback | 1650

a.Based on the above data record the customer having disposition code Follow up\_Callback will be migrated to lead id 1650.

Note:- All module used for auto dial only

**Data Table Structure:-(Lms\_leadno is primary key)**

\_\_customer\_id | 719023520

timezone |

priority\_flag | 4

phone2 | null

phone3 | null

phone1 | 7016531949

branch\_cd | 305

lms\_leadno | 00Q72000007PgZWEA0

keyval11 | 22.0

keyval12 | 0

keyval10 | 4

keyval15 | MORTGAGE

keyval13 | 0

keyval14 | 0

keyval6 | null

keyval7 | 1

keyval8 |

agentid | 0058n000000VTQ6AAO

keyval9 | 232.0000

keyval2 | NA

keyval3 | HSPLRetryMaxAttempts

keyval4 | NA

keyval5 | HDFC SALES

dnc\_check | true

dialtime | 2023-03-30 07:07:16

name | Amit Amit

keyval1 | INT\_REF

active\_ind | Y

should\_dial | t

numattempts |1

migrated\_lead\_id | 2345677

->The numattempts field in the data table is used to store the total number of auto calls. If the auto call is connected then the value of this field will again change to "0" otherwise it will be auto incremented for non-connected.

**table filter:-**

dialtime::timestamp::text >= ''||now()||'' AND active\_ind='Y'

**Auto Dial Flow:-**

Previously the format of lms\_leadno was numeric. Now the value of this ID is converted to alphanumeric for the same customer in Salesforce.

Pre Processing Nodeflow :- Before dialing any customer, ameyo checks whether the lms\_leadno of that customer is alphanumeric or not. If the value is alphanumeric then auto calling starts but If the value is numeric then ameyo call a salesforce api to get the alphanumeric (salesforce lms\_leadno) value of that customer and then it create a new record using alphanumeric lms\_leadno of same customer and update the old record as active\_ind “N” and should\_dial “F” and stop the dialing. Now, the same customer will dial with new lms\_leadno

**Stage 2.**

Auto Dial Nodeflow :- Once Pre- Processing nodeflow executes and auto dial nodeflow starts, ameyo system starts dialing customers before dialing customer ameyo check the dialing policy condition defined in the nodeflow on the basis of threshold value and dnc\_check value. Threshold value decided from hdfc existing module and dnc check from data table.After the call connected a salesforce API call to change the lead owner of salesforce and then the CRM page(lead page or CTI) pop-up and call recording start.

**Stage 3.**

Post processing :-

After Call dispose post processing nodeflow execute. The post processing nodeflow will read the configuration of lead migration module , max\_attempt module and retry interval module and change the value accordingly of customer in ameyo database and also send the calling details to salesforce through reverse feed. **Max Retry and retry interval module used for auto dial only.**

**->Next Action (Retry Time)Update Conditions for auto dial:-**

**n**

In the post processing max attempt and next action(retry time) read out from the module and update the data table accordingly.

1) If the dispostionClass of that call is schedule.callback then next action (dialtime) will be callback time chosen by agent and same will update in ameyo database and pass the data to salesforce via reverse feed api.

2) If the dispositionClass is force.dispo it means the agent has not scheduled any callback then the customer will dial via auto dial only and in this case next action will be the time defined in the module.

**->Active\_Ind Value Update Conditions for manual dial:-**

Default value of active\_ind is “Y”

1.If the value of numattempts is greater than max\_attempt defined in max \_ attempt module then the value of active\_ind will change to “N” it means the customer will not dial again via auto dial.

1. Active\_ind value changes from “Y” to “N” when an agent disposes of any call using a “closed” disposition code.

2.Active\_ind value changes from “Y” to “N” when an agent disposes of any call using a “force.dispo” disposition class.

Note:- If the value of Active\_ind is “Y” then only auto.dial will work.

**-> dispositionCode Value update condition in salesforce.**

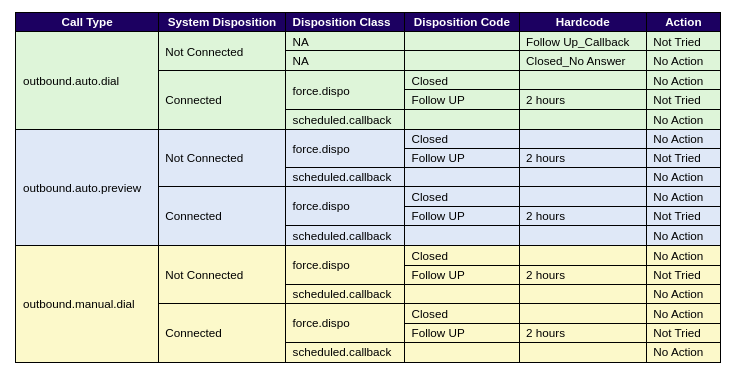
In the case of an auto dial (predictive) customer connects first and if the call is not connected then call will not come to an agent and in this case disposition code will be null for this case disposition code value is hardcoded and the same value will push in the salesforce via reverse feed.

1. If the active\_ind of that customer is “Y” and call is not connected then dispositionCode will be “Follow Up-CALL\_BACK-null”
2. If the active\_ind of that customer is “N” and call is not connected then dispositionCode will be “Closed-NO\_ANS-null”

**->Through post processing we also change the status of the call to NOT\_TRIED as per the condition defined below.**

Ameyo also change the lead status as not tried on the basis of below mentioned cases:-

**Lead Status Change:-**



**NOTE:- In the above chart the hardcode value of 2 hours has been removed from the nodeflow**

**Case 1:- Call\_Type(outbound.auto.dial)--> Predictive**

**A)Not Connected:-**

**a)Follow up\_Callback**

->If system disposition is Not Connected and User Disposition (disposition code) is Follow up\_Callback then Lead Status (system disposition) should be changed to NOT\_TRIED.

Eg. If the customer dialed through outbound.auto.dial and system disposition is No\_Answer and disposition Code is Follow up\_Callback then Lead status should be changed from No\_Answer to NOT\_TRIED.

**b)Closed\_No Answer**

->If system disposition is Not Connected and User Disposition (disposition code) is Closed\_No Answer then Lead Status (system disposition) should not be changed.

Eg. If the customer dialed through outbound.auto.dial and system disposition is No\_Answer and disposition Code is Closed\_No Answer then Lead status should not be changed it will be the same as No\_Answer.

**A)Connected:-**

**a)force.dispo(closed)**

->If system disposition is Connected ,User Disposition Class (disposition class) is force.dispo and disposition code is closed then Lead Status (system disposition) should not be changed.

Eg. If the customer dialed through outbound.auto.dial and system disposition is CONNECTED ,User Disposition Class (disposition class) is force.dispo and disposition Code is close then Lead status should not be changed.

**a)force.dospo(follow -up)**

->If system disposition is Connected ,User Disposition Class (disposition class) is force.dispo and disposition code is follow-up then Lead Status (system disposition) should be changed to NOT\_TRIED.

Eg. If the customer dialed through outbound.auto.dial and system disposition is BUSY and disposition Code is Follow up\_Callback then Lead status should be changed from BUSY to NOT\_TRIED.

**Case 2:- Call\_Type(outbound.auto.preview)-->**

**A)Not Connected:-**

**a)Follow up\_Callback**

->If system disposition is Not Connected and User Disposition (disposition code) is Follow up\_Callback then Lead Status (system disposition) should be changed to NOT\_TRIED.

Eg. If the customer dialed through outbound.auto.dial and system disposition is No\_Answer and disposition Code is Follow up\_Callback then Lead status should be changed from No\_Answer to NOT\_TRIED.

**b)Closed\_No Answer**

->If system disposition is Not Connected and User Disposition (disposition code) is Closed\_No Answer then Lead Status (system disposition) should not be changed.

Eg. If the customer dialed through outbound.auto.dial and system disposition is No\_Answer and disposition Code is Closed\_No Answer then Lead status should not be changed it will be the same as No\_Answer.

**A)Connected:-**

**a)force.dispo(closed)**

->If system disposition is Connected ,User Disposition Class (disposition class) is force.dispo and disposition code is closed then Lead Status (system disposition) should not be changed.

Eg. If the customer dialed through outbound.auto.dial and system disposition is CONNECTED ,User Disposition Class (disposition class) is force.dispo and disposition Code is close then Lead status should not be changed.

**a)force.dospo(follow -up)**

->If system disposition is Connected ,User Disposition Class (disposition class) is force.dispo and disposition code is follow-up then Lead Status (system disposition) should be changed to NOT\_TRIED.

Eg. If the customer dialed through outbound.auto.dial and system disposition is BUSY and disposition Code is Follow up\_Callback then Lead status should be changed from BUSY to NOT\_TRIED.