



# CASE MANAGER 5.2 - DIALER INTEGRATION

USER MANUAL



# Table of Contents

## SECTION 1 OVERVIEW AND PURPOSE

### SECTION 2 AUTOMATED DIALER CONCEPTS

[What is an Outbound Call Centre?](#)

[What is an automated dialer?](#)

[Different types of automated dialers](#)

[Benefits of using an automated dialer](#)

[References](#)

### SECTION 3 DIALER INTEGRATION FEATURES AND FUNCTIONS

[How does Case Manager Dialer Integration work?](#)

[The basics](#)

[The technical processes](#)

### SECTION 4 SETUP AND INSTALLATION

[How do I set up and install Case Manager Dialer Integration?](#)

[Setup](#)

[Figure 1: Configuration Tools screen displaying Phone Call Templates screen.](#)

[Installation](#)

[Figure 2: Case ManagerDialerIntegrationExtension folder in the Case ManagerExtensions folder.](#)

[Figure 3: Plug-in Actions screen displaying the Add Plug-in button and the Action Plug-in Library screen.](#)

### SECTION 5 USING CASE MANAGER DIALER INTEGRATION

[Figure 4: Case Manager loaded case screen displaying loaded outbound phone call activity.](#)

[Figure 5: Phone Call Completed action screens.](#)



## SECTION 1 OVERVIEW AND PURPOSE

Case Manager Dialer Integration works in conjunction with third party automated dialer programs and enables you to manage your outbound automated phone call activities through Case Manager.

This User Manual will provide in-depth information on the features and functions of the Dialer Integration, setup and installation procedures, and how to use it.

## SECTION 2 AUTOMATED DIALER CONCEPTS

### What is an Outbound Call Centre?

An outbound call centre is one in which a collection of call centre agents make outgoing calls to customers on behalf of a business or company. These activities are usually operated for the purposes of telemarketing, solicitation of charitable or political donations, debt collection and market research.


Outbound call centres usually employ technological solutions and integrations to effectively and efficiently manage all phone call activities - typically using an automated dialer - so that large numbers of calls can be made per hour.

### What is an automated dialer?

An automated dialer is a software program that can be used to automatically dial telephone numbers from a phone list or database. Once the call has been answered, the autodialer either plays a recorded message or connects the call to a live person (call centre agent).

### Different types of automated dialers

- **Predictive**  
Predictive dialing is the most productive form of dialing automation. A predictive dialer launches calls at a rate such that the system connects to 'live' callers as soon as an agent completes the previous transaction.
- **Preview**  
Preview dialing allows the agent time to preview the customer details before the call is launched.
- **Progressive**  
With progressive dialing, once an agent has indicated that they are ready for a call, information about the call is presented to them, and the number is then dialled



immediately. Calls that do not result in ‘ringing’ are automatically and immediately disconnected, whilst ‘no answers’ are disconnected after a pre-defined number of seconds.

- **Power**  
With power dialing, the agent begins the calling session and, when a live answer is detected, the call is patched through to the agent.

### Benefits of using an automated dialer

This kind of technology is a fast and efficient way of reaching many clients in the shortest possible time. In so doing, automated dialing drives efficiency and profitability, and streamlines call activities for optimal performance and productivity from call centre agents.

All of this activity, however, also has to be managed, especially when there is quality information to capture. This is where Case Manager Dialer Integration comes in. Read on to find out how Case Manager Dialer Integration will help you manage your automated outbound phone call activities.

### References

For more information on call centres, automated dialing and related topics, please refer to the following link:

<http://www.callcentrehelper.com/>

## SECTION 3 DIALER INTEGRATION FEATURES AND FUNCTIONS

### How does Case Manager Dialer Integration work?

#### The basics

Once **Case Manager Dialer Integration** has been installed and integrated with the third party automated dialer program on your system, depending on the third party dialer program used, a popup is displayed when a call is transferred to an available agent. The popup generally shows the name of the call recipient and has “Accept” and “Decline” options for the agent to choose from. If the agent accepts the call, the automated dialer communicates with the local Case Manager and prompts it to open the applicable case with all the details of the call recipient. Now the agent will immediately be able to see who they are talking to and what needs to be achieved through the call. Depending on how the automated dialer is integrated with Case Manager, an **Outbound Phone Call Activity** may also load. This **Outbound Phone Call Activity** must then be qualified (specifying the nature and result of the phone call activity) by the agent in Case Manager.

## The technical processes

A **Hypertext Transfer Protocol (HTTP) Listener** is created by the Case Manager Dialer Integration on localhost on port 16300. HTTP is a communications protocol that is used to send and receive data on the internet.

Via this HTTP Listener, the Dialer Integration enables the third-party automated dialer program to communicate with Case Manager via HTTP. In essence, the Case Manager Dialer Integration processes the HTTP requests that the third-party program sends and tells Case Manager what to do.

These HTTP requests are in the same format as a web address, also called a Uniform Resource Locator (URL). The URL that the Dialer Integration can process will look something like this:

**`http://localhost:16300/Case Manager/Case?CaseID={CaseID}`**

This URL has a variable with the name “CaseID” - a valid value for this variable would be a Case GUID (Global Unique Identifier) that exists in Case Manager. The Case GUID will replace {CaseID} in the URL. If the case exists, the case will be opened in Case Manager and a response of “OK” will be sent back to the automated dialer program. If the case does not exist, a response of “ERROR: Case does not exist” will be sent back to the automated dialer program.

## SECTION 4 SETUP AND INSTALLATION

### How do I set up and install Case Manager Dialer Integration?

The Dialer Integration is a **plug-in extension**. A plug-in is defined as a hardware or software module that adds a specific feature or service to a larger system. This means that the Dialer Integration plug-in adds the service of integrating third party automated dialer programs with Case Manager.

#### Setup

Before you install the plug-in on your system, there are a few things you will need to have in place first:

- You must have Case Manager and a third party automated dialer program already installed on your system.
- You will need to export the relevant cases from Case Manager to the automated dialer program. This information must include:
  - **Case GUID** (Global Unique Identifier) OR **Case Reference** (If the case reference number is unique) and;
  - the **Phone number** you want the predictive dialer to dial.

- In Case Manager, the selected Outbound Phone Call Activity Template's name should contain "#dialer" (This is not case sensitive) in order for the Dialer Integration to load the Outbound Phone Call Activity when the case opens (when a dialed number is accepted by an agent). You will be able to do this in **Case Manager Configuration Tools** under **Templates > Phone Call Templates** (Figure 1):

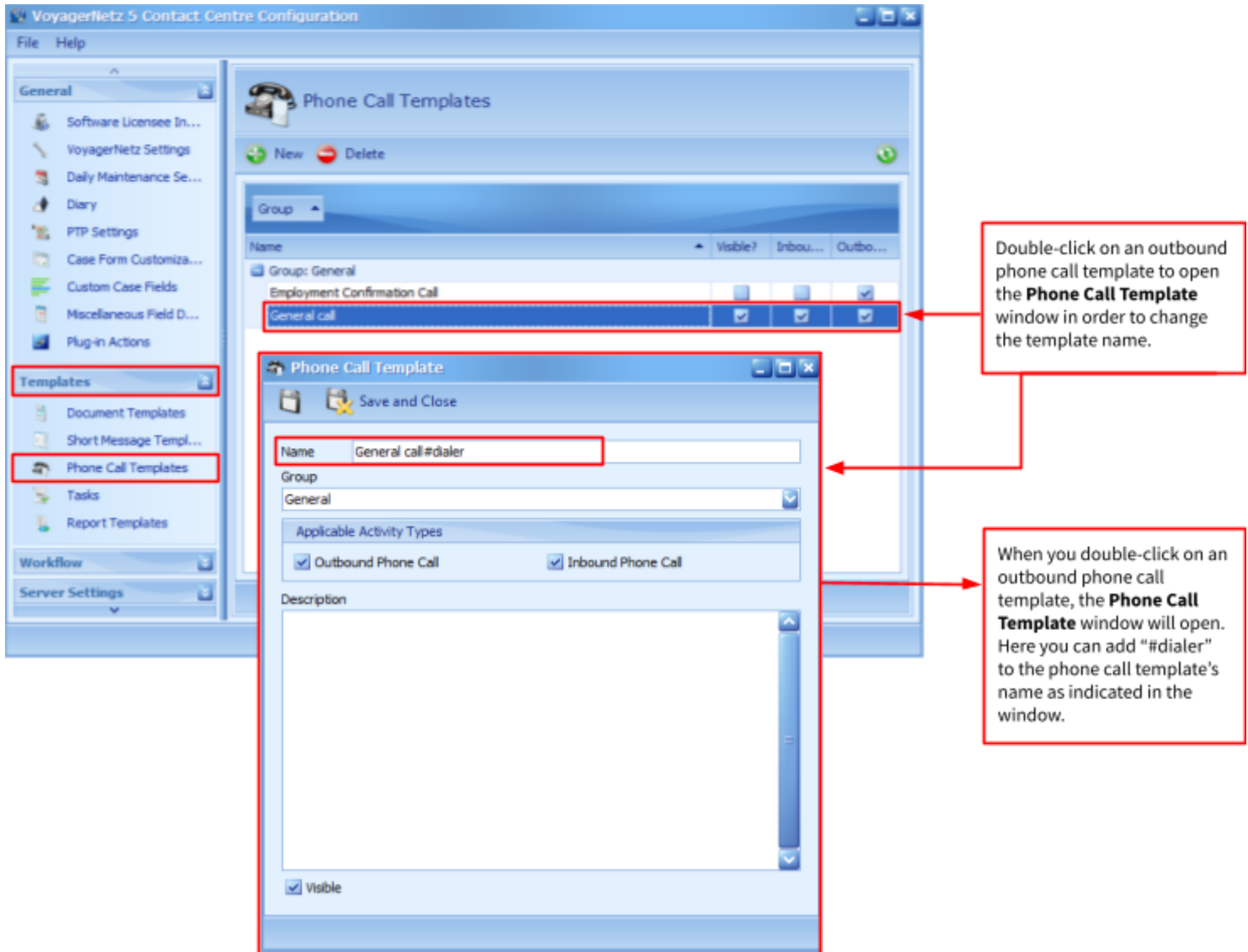


Figure 1: Configuration Tools screen displaying Phone Call Templates screen.

Depending on how the automated dialer is integrated with Case Manager, the automated dialer may send two different requests:

1. One that only opens the applicable case in Case Manager and;
2. One that opens the applicable case and requests Case Manager to load an Outbound Phone Call Activity. **Please note** that "#dialer" should be included in the Outbound Phone Call Activity Template's name (as indicated in Figure 1) in order for the outbound phone call activity to open in Case Manager.

## Installation

Firstly, you need to make sure that a **Case ManagerDialerIntegrationExtension** folder is available in the **Case ManagerExtensions** folder on your server (Figure 2):

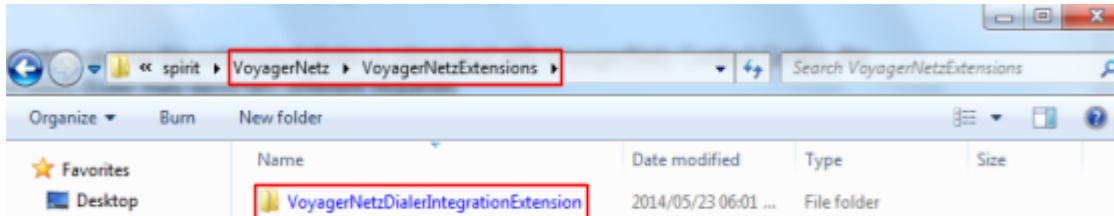


Figure 2: Case ManagerDialerIntegrationExtension folder in the Case ManagerExtensions folder.

Once you have established that the Case ManagerDialerIntegrationExtension folder is available on your server, open the Case Manager Configuration Tool. Under the **General** menu you must click on **Plug-in Actions, Add Plug-in** and then choose and open the **Microworks.Case Manager.Plugin.DialerIntegration.dll** file from the **Action Plug-in Library**, as indicated below (Figure 3):

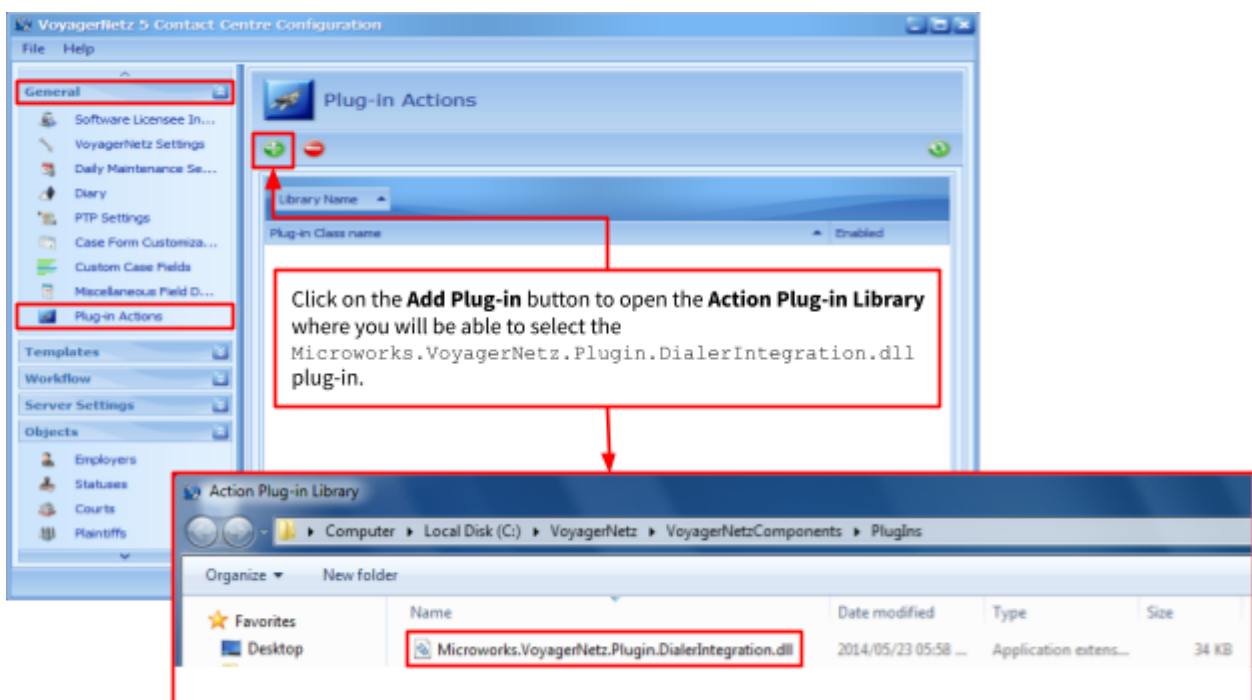



Figure 3: Plug-in Actions screen displaying the Add Plug-in button and the Action Plug-in Library screen.

You have now successfully installed the plug-in on your system and no further setup is required.

## SECTION 5 USING CASE MANAGER DIALER INTEGRATION

Once you have set up and installed Case Manager Dialer Integration on your system, ensure that you have Case Manager open, and the second your automated dialer connects a call to an agent and the agent accepts the call from the popup initiated by the automated dialer, Case Manager will



immediately and automatically open the case that corresponds to the request sent by the automated dialer program. An **Outbound Phone Call Activity** may also load, depending on your settings. All of these processes happen automatically so the agent doesn't need to worry about loading anything manually, other than clicking to accept the call.

For example, if you exported the case's unique reference number as the CaseID (in this example: 0000000003) to the automated dialer program, the Dialer Integration will recognise this information and tell Case Manager to open the case that has that specific case reference. If you included "#dialer" in the Outbound Phone Call Activity Template's name (as indicated in Figure 1), an Outbound Phone Call Activity will also load within the applicable case, as indicated below (Figure 4):



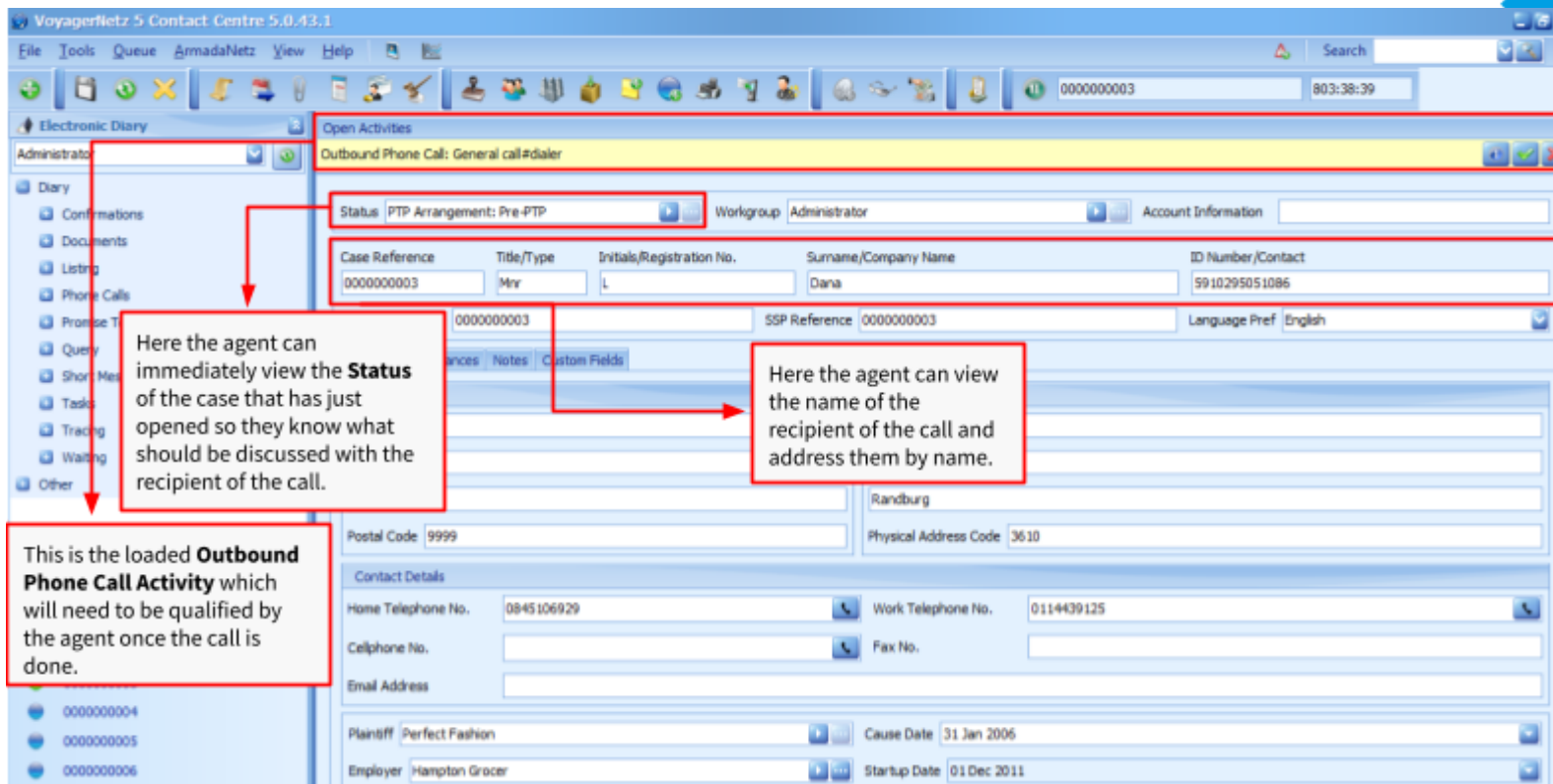


Figure 4: Case Manager loaded case screen displaying loaded outbound phone call activity.

When the call is concluded, the agent will have to qualify the Outbound Phone Call Activity by clicking on the **Phone Call Complete** button and selecting a **Qualification Status** from the **Outbound Phone Call: Complete** window that will open (Figure 5):



**Outbound Phone Call: Complete**

Outbound Phone Call: General call#dialer

Activity Date: 2014/12/03

Qualification Status

- Awaiting Info from Client
- Company Liquidated
- Company Untraceable
- Consumer Deceased (Unconfirmed)
- Consumer Emigrated
- Consumer Indigent
- Consumer Jailed
- Consumer Sequestered (Unconfirmed)
- Consumer Under Administration (Unconfirmed)
- Consumer Under Debt Review (Unconfirmed)
- Consumer Unemployed (Unconfirmed)
- Contact Made: Debtor will recall later
- Contact Made: Recall later on request

Additional Notes

OK Cancel

Once the call is complete, the agent can click on the **Phone Call Completed** button.

When the **Phone Call Completed** button is clicked, The **Outbound Phone Call: Complete** window will open. Here, the agent will have to qualify the phone call activity by selecting a **Qualification Status** and adding **Additional Notes** if necessary, and then click on the **OK** button.

Figure 5: Phone Call Completed action screens.