

ORACLE®

Contact Center Anywhere

Pattern Matching

Quick User Guide

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ORACLE CERTIFIED
PARTNER
promero

Preface

This product guide is divided into chapters; each chapter describes a specific topic. Certain typographical conventions are used throughout this product guide. See below:

- All commands you enter via keystrokes appear in bold (e.g., Press **Enter** or Press **Ctrl-I**).
- All text commands you enter into text boxes or other command line typing appear in italics (e.g., type *active*).
- All pull down menu options, figure references, and table references appear in italics in the menu order to select (i.e., Choose *File> Open*).
- There are three types of special text that are designed to reveal supplemental information: Note, Warning, and Caution. See below.



A **NOTE** provides additional, helpful information. This information may tell you how to do a certain task or just be a reminder for how-to's given in previous sections



A **WARNING** provides information about how to avoid harm to your system (i.e., do not delete your company).



A **CAUTION** provides information about how to avoid malfunction or unwanted Results (i.e., When using the IN logic always separate text with a single quote).

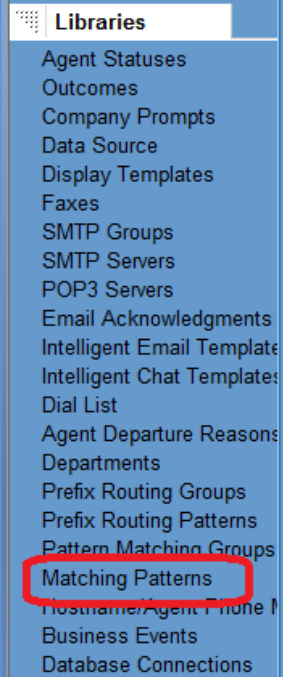
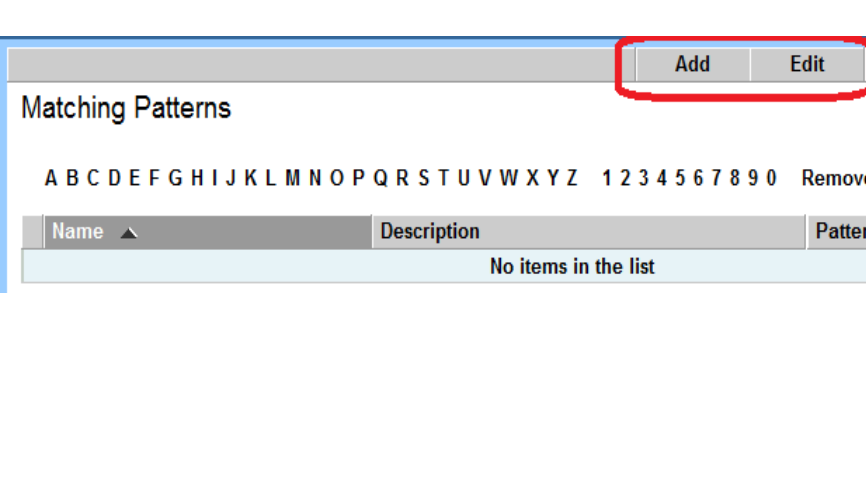
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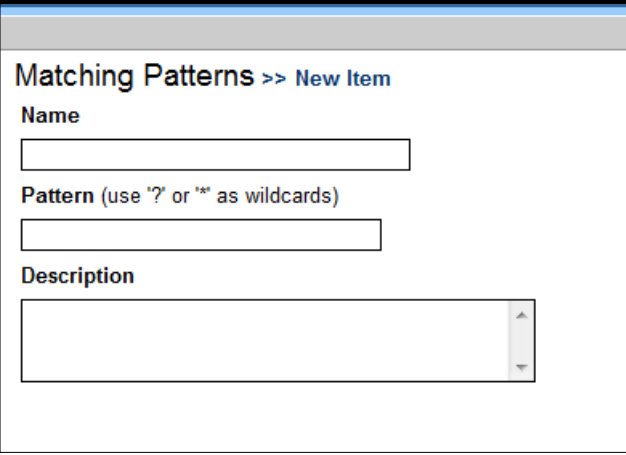
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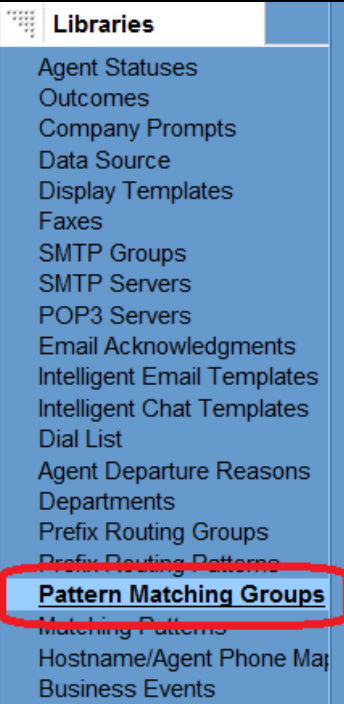
Overview

Oracle Contact Center Anywhere uses matching patterns to support features like predictive dialing, where you want to call only selected customers in a Dialer List. For example, use a Matching Pattern to call customers in which a string column in the Dialer List (City, State, Time Zone, and so on) matches a specific pattern.

Instructions

Step	Directions	Screen Shot
1	<p>From the Navigation pane, click Libraries, Matching Patterns.</p>	 <p>The screenshot shows a vertical navigation pane titled 'Libraries'. It contains a list of menu items: Agent Statuses, Outcomes, Company Prompts, Data Source, Display Templates, Faxes, SMTP Groups, SMTP Servers, POP3 Servers, Email Acknowledgments, Intelligent Email Templates, Intelligent Chat Templates, Dial List, Agent Departure Reasons, Departments, Prefix Routing Groups, Prefix Routing Patterns, Pattern Matching Groups, Matching Patterns (highlighted with a red box), Hostname/Agent Phone Number, Business Events, and Database Connections.</p>
2	<p>Do one of the following:</p> <ul style="list-style-type: none"> To add a new matching patterns library, click Add. To edit an existing matching patterns library, select the matching patterns library you want to edit from the list, and click Edit. <p>The Matching Patterns screen opens.</p>	 <p>The screenshot shows the 'Matching Patterns' screen. At the top right, there are two buttons: 'Add' and 'Edit', both highlighted with a red box. Below the buttons is a search bar with the text 'A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 1 2 3 4 5 6 7 8 9 0 Remove'. Below the search bar is a table with columns 'Name', 'Description', and 'Pattern'. The table is currently empty, displaying the text 'No items in the list'.</p>

<p>3</p>	<p>Complete the Matching Patterns screen, and click OK.</p> <p>The following table describes the fields.</p> <table border="1"> <thead> <tr> <th>Field</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Name</td> <td>Type a name that identifies the purpose of this pattern.</td> </tr> <tr> <td>Pattern</td> <td>Type a string pattern. Use the asterisk (*) wildcard character to match all characters in zero or more positions of the number. For example, type 9* to match all numbers beginning with 9, including 900-123-4567, 988-765-4321, 999-123-4567, and so on. This pattern does not match calls from 888-854-4224 or any other number that does not begin with 9.</td> </tr> <tr> <td>Description</td> <td>Type a description for this pattern to help identify it quickly in your Matching Patterns library.</td> </tr> </tbody> </table>	Field	Description	Name	Type a name that identifies the purpose of this pattern.	Pattern	Type a string pattern. Use the asterisk (*) wildcard character to match all characters in zero or more positions of the number. For example, type 9* to match all numbers beginning with 9, including 900-123-4567, 988-765-4321, 999-123-4567, and so on. This pattern does not match calls from 888-854-4224 or any other number that does not begin with 9.	Description	Type a description for this pattern to help identify it quickly in your Matching Patterns library.	 <p>The screenshot shows a web interface titled "Matching Patterns >> New Item". It contains three input fields: "Name", "Pattern (use '?' or '*' as wildcards)", and "Description".</p>
Field	Description									
Name	Type a name that identifies the purpose of this pattern.									
Pattern	Type a string pattern. Use the asterisk (*) wildcard character to match all characters in zero or more positions of the number. For example, type 9* to match all numbers beginning with 9, including 900-123-4567, 988-765-4321, 999-123-4567, and so on. This pattern does not match calls from 888-854-4224 or any other number that does not begin with 9.									
Description	Type a description for this pattern to help identify it quickly in your Matching Patterns library.									
<p>4</p>	<p>Repeat Step 1 and Step 2 of this procedure until all the matching patterns that your contact center requires are created.</p>									

<p>5</p>	<p>A Pattern-matching Group will then need to be created.</p> <p>Click Libraries, Pattern Matching Groups, and then Add.</p> <p>The Add Pattern Matching Groups screen appears.</p>	 <p>The screenshot shows a vertical menu titled "Libraries" with a grid icon to its left. The menu items are: Agent Statuses, Outcomes, Company Prompts, Data Source, Display Templates, Faxes, SMTP Groups, SMTP Servers, POP3 Servers, Email Acknowledgments, Intelligent Email Templates, Intelligent Chat Templates, Dial List, Agent Departure Reasons, Departments, Prefix Routing Groups, Prefix Routing Patterns, Pattern Matching Groups (highlighted with a red circle), Matching Patterns, Hostname/Agent Phone Map, and Business Events.</p>
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6 Under Name, type the name of the pattern matching group:

Ex. *Pacific Time Zone Pattern Group*

Pattern Matching Groups >> New Item

Name
Pacific Time Zone Pattern Group

Description

Select the prefix patterns for this Group

<input checked="" type="checkbox"/>	Name ▲	Pattern
<input checked="" type="checkbox"/>	Pacific	P

7 Within a Project, navigate to the **Predictive** Tab and then click the **Start/Stop Schedule** subtab.

Click **Scheduled Start/Stop**.

Outcomes | Workgroup Prompts | Dialer Lists

General | Phone | Predictive | Chat | SMS | Email | Web Callback | Fax Responses

Enable Predictive Project

Priority: Normal | Select a Workgroup: BTR | Predictive Off |

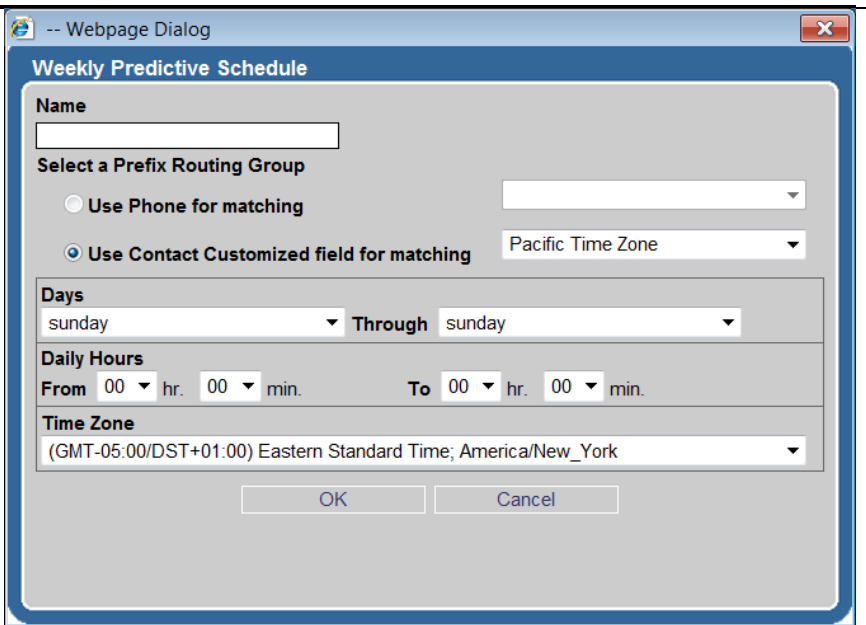
Options | Regulations | Dialer Ratio | Actions | Permissions | Start/Stop Schedule

Manual Start/Stop
 Scheduled Start/Stop

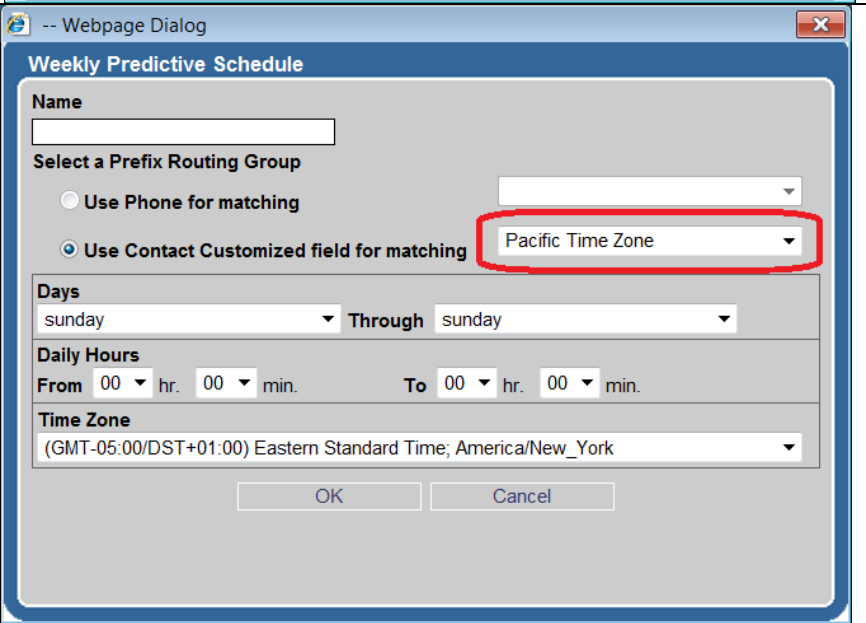
General | Start | Stop | Time Zone

8 The **Weekly Predictive Schedule** dialog box appears.

Under Name, type the name of the schedule



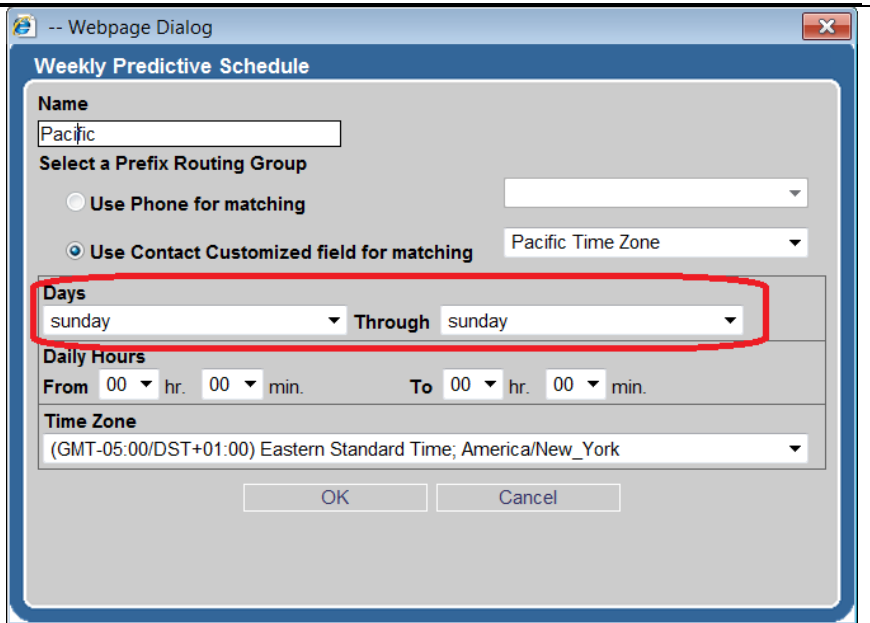
9 In the **Use Contact Customized field for Matching** drop down menu and select the desired pattern matching group.



10 From the **Days** drop-down list, select the days that the predictive dialing schedule runs (such as Monday through Friday).

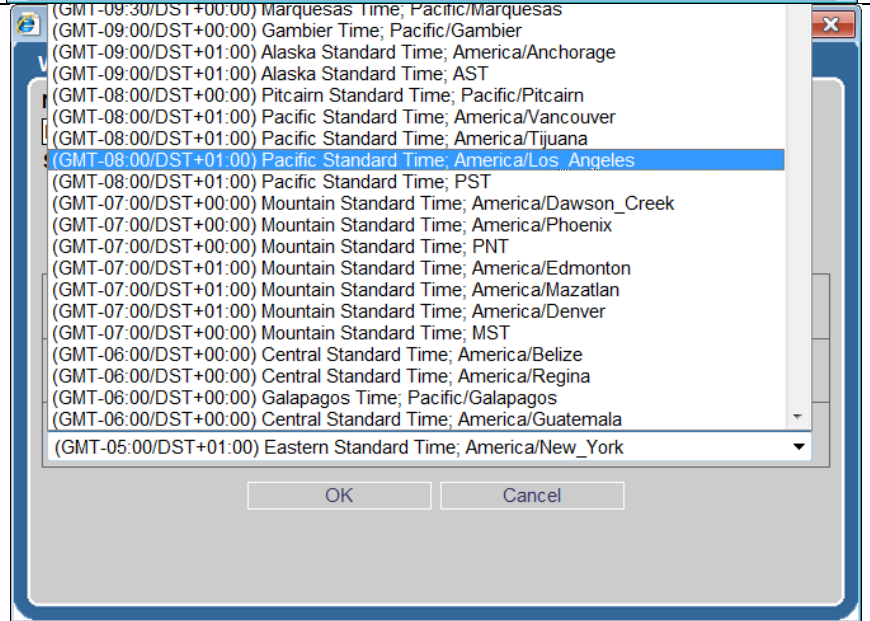
From the **Daily Hours** drop-down list, select when the predictive dialing schedule runs (such as 8:00 A.M to 5:00 P.M.).

***F.Y.I.** The schedule will be in the local time of the desired time zone.*

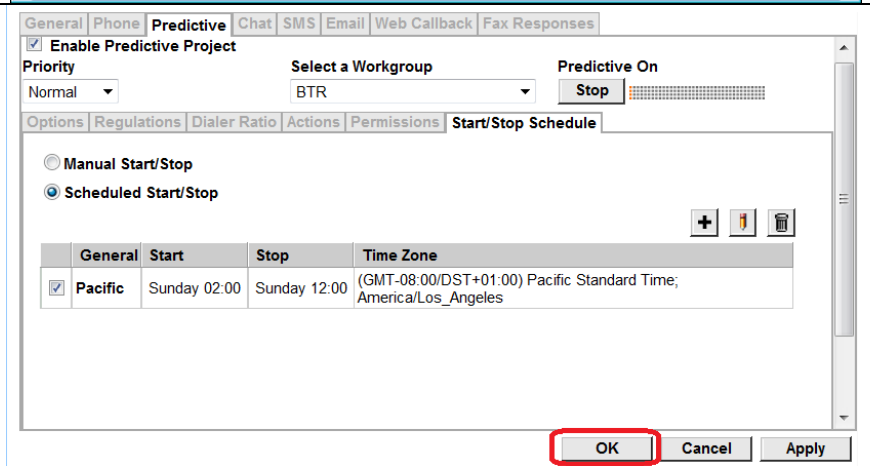


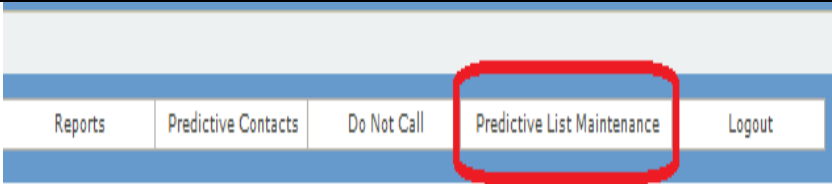
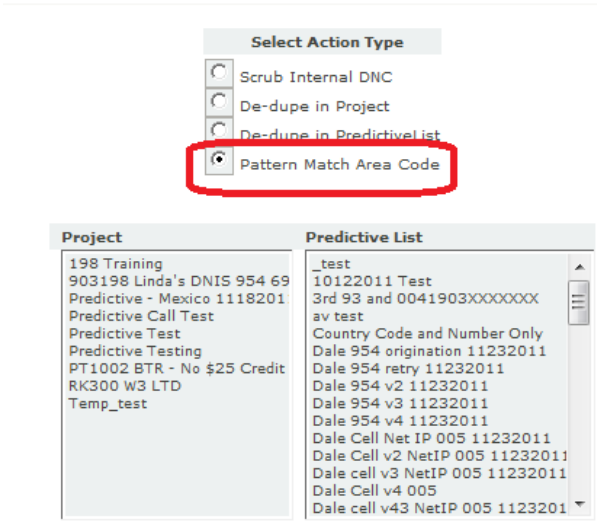
11 From the Time Zone drop-down list, select where the project runs.

Then click **OK** to save the schedule.



12 In the **Predictive** tab, click **OK**.



<p>13</p>	<p>In CCA Reports, click Predictive List Maintenance.</p>	
<p>14</p>	<p>Under Select Action Type, select Pattern Match Area Code and then select the Project and Predictive list.</p> <p>Click Update Contacts</p> <p>CCA reports will analyze the list and determine when to call each number based upon the schedule that was created with the project.</p>	

Contact and Support Information

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