Outbound (CX Contact) CX Contact Help

Device Escalation

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  - Administrator

Learn about the **Device Escalation** sub-tab of the **Treatment** tab. For information on the **Delivery Options** sub-tab or the **Retry Options** sub-tab, go here. For information about applying SCXML treatment scripts, go here.

Related documentation:
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In the event records within a contact list contain multiple devices, you can use the **Device Escalation** feature to specify which device(s) in the record you want the system to dial. If you want the system to dial more than one device, you can define the order in which the devices are dialed. For voice campaigns, you can also specify how to handle answering machine detection - drop the call, deliver the call to an agent, or send the call to a DN for treatment (for example, leave a pre-recorded message).

Enable Device Escalation

To get started, on the **Treatment** tab, click the **Treatment** button to see all available treatment sub-tabs - **Delivery Options**, **Retry Options**, and **Device Escalation**.

The **Device Escalation** sub-tab is initially disabled (greyed out). To enable it, set the **Use Device Escalation** switch to the **On** position.

Now you can click the **Device Escalation** sub-tab to define the device escalation plan.

By default, all 10 devices are enabled and are prioritized/ordered from Device 1 to Device 10. Each device can be enabled or disabled at any time, even while a campaign group is running, and the changes are updated in real-time.

The fields on the **Device Escalation** tab are as follows:

> ## Important
>
> Before **Device Priority** configuration can take effect, the Next in chain or Next in chain after option must be enabled for call results on the **Retry Options** tab.

- Enable Device - **On** means the device is attempted and included in the escalation plan. **Off** means it is excluded.

- Device Priority and Device to Contact - These fields define the priority of a device being attempted. For example, if you want Device 3 to be attempted first (i.e. before all other devices in the escalation plan), drag and drop **Device3** to align with the 1st **Device Priority** field. See the Prioritize Contact Order example below for more information.

- Answering Machine (enabled for the voice channel only) - Define how you want the system to respond if it detects an answering machine. See the section on Handling Answering Machine Detection below for more information.

Handle Answering Machine Detection

> ### Important
> This field applies only to campaigns using the voice channel.

The system can handle answering machine detection in a couple of ways:

- Drop the call

- Deliver to a DN - to either an agent or to a DN where a pre-recorded message is retrieved.

If you opt for the second option, you must first do the following:

1. On the **General** tab for the campaign object, specify an **Agent Group** and **Destination DN**.

2. On the **Treatment -> Delivery Options** tab, check the **Will be connected** box. The DN specified on the **General** tab populates in the **DN** field. Then, on the **Device Escalation** tab, the **Will be connected** option is automatically enabled for each device and the DN is automatically populated. **Note**: If you edit the default Destination DN on this tab, the change will apply to all devices because all devices must use the same Destination DN.

> **Important**
>
> If you do not follow the steps above, your only option is to drop the call upon answering machine detection.

Device Escalation Business Scenario

The best way to understand how this feature works is to read the scenario below and then apply the principles and plan to your own scenario.

To begin, let's say there are four devices for a record:

- Device 1 is home
- Device 2 is personal mobile
- Device 3 is work
- Device 4 is business mobile

You should now formulate a plan. In this scenario, you should start by determining which devices you want to target, then prioritize the order in which those devices are contacted, and then determine what you want to do if the system detects an answering machine on any given device.

Target Devices

Plan: You're calling at a time when contacts are unlikely to answer their home phone or their work phone - say at lunch time on a weekday - so you want to target mobile devices only. In this case, that's Device 2 (personal mobile) and Device 4 (business mobile).

Action: For Device 2 (personal mobile) and Device 4 (business mobile), leave the **Enable Device** switches set to the **On** position. For all other devices, turn the **Enable Device** switch to the **Off** position.

Prioritize Contact Order

Plan: Notice in the **Device to Contact** field that Device 2 (personal mobile) is placed in the 2nd priority position, while Device 4 (business mobile) is placed in the 4th priority position. That means the system will call the personal mobile phone before calling the business mobile. Let's say you want

the reverse to happen - you want to start with Device 4 (business mobile) before proceeding to Device 2 (personal mobile).

Action: To reverse the order:

1. Drag Device2 (personal mobile) from the 2nd priority position to the 4th priority position. This moves Device4 to the 3rd priority position because a device that is displaced from its original position moves up or down one position - it does not switch places with the device moving into its position.

2. Drag Device4 (business mobile) from the 3rd priority position to the 2nd priority position.

Link to video

Handle Answering Machine Detection

> ### Important
> Remember, this option only applies to campaigns using the voice channel.

Plan: If an answering machine is detected on Device 2 (personal mobile), you want an agent to take the call and leave a voicemail. If an answering machine is detected on Device 4 (business mobile), you want the system to hang up.

Action: In the **Answering Machine** field, select the following:

- Device 4 (Business mobile) - Deselect **Will be connected**.
- Device 2 (Personal mobile) - Leave the **Will be connected** option enabled (checked).