Sequence Dialing & Quota Calling

Guide & User Instructions

Revised 04/2013

One Call Now

726 Grant Street
Troy Ohio 45373
877.698.3262
937.335.3887
onecallnow.com
support@onecallnow.com

America’s Largest Message Notification Provider

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Introduction

The Sequence Dialing & Quota Calling features are Advanced Messaging Options. Sequence Dialing allows you to specify the order in which your members (or their individual phone numbers) are dialed rather than calling them simultaneously. Setting up the sequence in which to call your members can be done manually or by using the Import Wizard.

Sequence Dialing can be used to dial:

- Sequence By Member – Select the order in which members in a Subgroup are called.
- Sequence By Number – Select the order in which the devices for a specific recipient are dialed.
- Sequence By Member By Number* – A combination of the above two options where the One Call Now system calls members in a predefined sequence, calling their devices in order of preference (mobile phone then home phone, etc.)

Sequence Dialing can also be used in conjunction with Quota Calling to call members of your staff in your specified order until a shift is filled. You can also use this feature to call until you have reached one person live on an emergency response list. With Sequence Dialing, the order in which the members are called can be adjusted as often as you need it to be so the members are not called in the same order each time.

Quota Calling is used to send calls until a set number of live answers respond via polling and/or hot transfer. Once members respond, the system plays a follow-up message based upon their response and the status of the quota. A quota can be set for one Subgroup or across several Subgroups. Quota Calling when used with Sequence Dialing makes calls to fill the quota in a specified order.

Following are available options for sending Quota Calls:

- Quota Call (without Sequencing) – call all members in a Subgroup(s) in no predetermined order until the Quota has been filled
- Quota Call with Sequence by Member – call members in a predetermined order until the Quota has been filled
- Quota Call with Sequence by Phone – call members’ phones in a predetermined order until the Quota has been filled. With this option, all members are added to the phone queue at the same time, their phone numbers are called in the specified order.
- Quota Call with Sequence by Member and Phone* – call members in a predetermined order and also their phone numbers in a particular order until the Quota has been filled.

*NOTE: The Main Contact/Primary Number feature is impacted by the Sequence Dialing by Member by Number option. These two features are mutually exclusive. This means that you can choose to use either Sequence by Member by Number OR Main Contact/Primary Number, but not both.
Creating a Subgroup

Subgroups allow you to deliver messages to just some of your Group members. Before you can put your members in a calling order, you must first add them to a Subgroup. After logging into your account with your Group ID and password:

1. Select Manage Group and then Manage Subgroups from the Group Leader Menu.
2. To create a Subgroup, click the Add Subgroup button.

3. A two-digit number is assigned to the new Subgroup. This number is used to identify the Subgroup when initiating messages using the telephone. You can change this number if you want.
4. Enter a Subgroup name which can describe the Subgroup, such as "Booster Committee" or "Grade 2."
5. Check the boxes to the left of each Group member to include the member in the new Subgroup.
6. The Select All button will check all Group members for inclusion in the Subgroup. The Clear All button will uncheck all Group members in the Subgroup. This is helpful with Subgroups whose membership changes frequently, such as an Attendance or New Member Subgroup.

7. After adding and/or removing members from your Subgroup, remember to click the Save button to save your changes.
Manually Setting the Order in which to Call each Member

Now that your members have been added to a Subgroup, you can add the order in which to call them. To do this, you will edit your Subgroup. To Edit a Subgroup from the Manage Subgroup screen:

1. Click on the Edit icon to the left of the Subgroup you want to Sequence.
2. To display a list of members in your Subgroup, choose the “In this Subgroup” radio button.
3. Define which members to call in which order by entering a number in the Sequence Order box to the right of each of your member’s names.
4. Once you have put all of the Subgroup members in order, click the Save button.
5. To verify that your members have been placed in a sequence, click the Edit icon next to the Subgroup you just saved. Your members will be in the order in which you placed them!

   * 2-Digit Subgroup Number: 01  
   * Subgroup Name: First Shift  

   **Members**  
   **Messengers**  

   ![Members and Messengers Table]

6. The next time you send a message to this Subgroup, your members can be called in the order you have selected!

   **NOTE:** After a Subgroup is sequenced, they will be called in that order when a sequencing message type is selected. Sequence Dialing can be turned on or off based on the Type of Message that is selected when a call is created. For example, you have sequenced your Subgroup as shown above; you send a message choosing Quota Call with Sequence by Member as your Message Type. The call will go out in the order set on the Subgroup. If you send the next message to this Subgroup and choose the Quota Call (without Sequencing) option, members will be placed in the queue simultaneously and the order you specified will not be used.
Manually Setting the Order to Call each Member’s Phones

With Sequence Dialing, you can also set the order in which to call each member’s phones (Sequence by Phone Number*). Sequence by Phone Number for members can be done from the Roster:

1. Choose Manage Group from the Group Leader menu.
2. Choose Roster.
3. Find the first member you want to update in your Roster, then click the Edit icon.
4. The Sequence Order can be found in the middle of the screen to the right of each phone number listed for your member.

5. In the same way you sequenced your members, you can also order their phone numbers. Enter the order in which you want to call this member’s phone numbers.
6. Click the Save button.
7. To verify the order you have set, click the edit button again. Your members’ phones will be listed in the order you requested!
Uploading Sequence Order with Import Wizard

Setting the sequence to call your members and/or their phone numbers can be done using the Import Wizard! Choose Manage Group from the Group Leader menu.

1. Choose Import Wizard.
2. Click the Start Import button.
3. Click the Select button to choose the file on your computer that contains your contacts’ information.
4. Verify that the default area code is correct. This area code will be applied to any numbers in your file that do not include an area code.
5. Depending upon the state of your Roster/uploaded file, choose one of the following options:
   a. Replace the existing Roster with all new members from your file – use this option if the members in your uploaded file should overwrite all of the members currently loaded in your One Call Now Roster.
   b. Add or update the members from your file to your existing Roster – use this option if you only want to add/update members currently loaded in your One Call Now Roster with the information contained within your file.
6. Click the Next Step button.
7. The Preview and Map Your File page is where you will identify/map the columns in your file. To create a Subgroup that is sequenced by how you want your members contacted, choose Sequenced Subgroup from the drop-down list.

The Preview and Map Your File page is where you will identify/map the columns in your file. To create a Subgroup that is sequenced by how you want your members contacted, choose Sequenced Subgroup from the drop-down list.
You can also configure the order in which you want to call each member phone number. To sequence your members’ phones using the Import Wizard, choose the appropriate drop-down for each column:

After you have mapped all of the columns from your file, click the Next Step button.

8. When you have Subgroups in your file, there are several options for additional configuration.

- If you chose Replace or Add in step 5, there are some additional options as well:
  
  a. Replace

  - Clear Subgroups - Clears and replaces any members from Subgroups included in the file for this import. No changes will be made to any Subgroups in your account that are not listed in the file.
b. Add

How should we update your Subgroups:
- Leave existing members in all Subgroups
- Clear existing members from all mapped Subgroups below

- Leave Subgroups - leaves everyone in Subgroups (This is for adding additional people to the Subgroups.)

- Clear Subgroups - for each Subgroup listed in your file, all current members will be cleared from the matching existing Subgroups. This leaves the Subgroups intact, but opens those Subgroups for a new set of members. No members are deleted from your Roster just cleared from the Subgroup. This action is great for importing a daily absentee list!
**NOTE:** You can combine multiple Subgroups from your file into a single Subgroup by entering the same Subgroup name and number in the mapping controls for each Subgroup that you want to combine.

9. Ensure that the Subgroup mappings are correct and make any changes, if necessary. You can check or uncheck any Subgroup to include or exclude it from the import. Additionally, you can rename any Subgroup in the Subgroup Name box to the far right.

10. Click the **Next Step** button.
11. Confirm the import information is correct and click the **Import** button.

### Please verify the import information:
- **Import File:** TroyTeamRoster.xlsx
- **Roster Action:** Replace
- **Number of Records in File:** 20
- **Number of Groups:** 1
- **Number of Members:** 20
- **Number of Phone Numbers:** 25
- **Number of Email Addresses:** 0

Results of the import will be emailed after processing.

### Column Mapping:

<table>
<thead>
<tr>
<th>Import File Columns</th>
<th>Column Index</th>
<th>Map To in Roster</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>1</td>
<td>mapped to Full Name</td>
</tr>
<tr>
<td>Phone 1</td>
<td>2</td>
<td>mapped to Phone Number 1</td>
</tr>
<tr>
<td>Desc 1</td>
<td>3</td>
<td>mapped to Phone Description 1</td>
</tr>
<tr>
<td>Phone 2</td>
<td>4</td>
<td>mapped to Phone Number 2</td>
</tr>
<tr>
<td>Desc 2</td>
<td>5</td>
<td>mapped to Phone Description 2</td>
</tr>
<tr>
<td>Varsity</td>
<td>6</td>
<td>mapped to Subgroup</td>
</tr>
<tr>
<td>equals &quot;X&quot;</td>
<td>7</td>
<td>01 / Varsity</td>
</tr>
<tr>
<td>JV</td>
<td>equals &quot;X&quot;</td>
<td>02 / Junior Varsity</td>
</tr>
</tbody>
</table>

If changes need to be made, please click "Previous Step" before proceeding.

Click "Import" to start the processing of this file. Your job will be submitted to our servers for processing. Depending on the size of your list, it will take anywhere from a few minutes to a few hours to process. You will receive an e-mail notification when the processing is complete. If there were any errors detected during the processing, you will receive an e-mail notification describing the error.

You have now imported your list and identified in what order you want your members to be called!
Sending a Quota Call Using your Computer

1. Click Messaging and then Send a Message from the Group Leader menu.

Message setup consists of choosing the type of message (Informational, Priority*, Quota, or Sequence) you need to send. Depending upon the features included within your plan, you may also need to identify the source for the contact information. For more information on sending messages to members that are not in your Roster, check out our Help & Support Center and search keyword: Canned Call. For this instruction, we will assume messages are sent from the Roster:

*High priority message delivery can be added to select Service Plans. These messages are reserved for vital messages (typically for Emergency Management organizations or Search and Rescue groups that need to reach selected members within their Group immediately. These messages are placed in a High Priority queue ahead of standard messages).

2. Select your message type and click the Next button.

NOTE: Not all Service Plans include High Priority or Message Builder options, if your Service Plan does not include these features, you will not see them listed on this screen.
3. Again, depending on the features in your plan, you may see one or all of the methods for sending out voice calls to your members:

**Text-to-Speech (optional feature)**

The Text-to-Speech engine can speak your message for you. Simply type your text in the box and choose a voice to read your message. The Text-to-Speech voices are impressively human sounding with 19 available languages, the Text-to-Speech engine saves you time when sending messages.

**Audio Library Message**

When you choose the Audio Library option, you can then choose to have a different message play for live answers and for answering machines. Once you have decided to use one or two messages, then the click the drop-down box to display the list of available files in the Audio Library.

If you have Advanced Language options, you may choose to send either a multilingual or single-language message. Accounts with Basic Language options are limited to single-language messages.

**One Call Stock Library**

Stock messages are delivered in multiple languages based on your group members’ preferred language setting. There are 30 common messages recorded by native speakers in 11 languages, including English.
Choosing a stock message is very similar to choosing files from the Audio Library. However, you cannot have a different message for answering machines.

As with messages from the Audio Library, you can choose to send either a multilingual or a single-language message. Accounts with Basic Language options are limited to single-language messages.

**PIN Delivery (optional feature)**

For phone messages, you can require that the recipient enter a four-digit PIN to hear the message. This is especially useful when you have sensitive information that you want to deliver. For more information on PIN Delivery, search the One Call Now Help & Support Center using keyword: Guide.

**Polling Options**

Phone messages can have polling options. That is, you can collect touch-tone responses from your message recipients. If you offer your members a couple of options, and then map those to numbers, you can easily get an idea of how many of your members prefer which option.

You can also use the polling function to transfer a call to a specified number. We call this feature Hot Transfer. Read more about Hot Transfer in the Hot Transfer guide.

4. Choosing the Quota Settings:

   **Quota Settings**

   - My Quota is across all selected subgroups
   - Required Quota: Enter Quota
   - I want to enter a different Quota per subgroup

   Send one call across all Subgroups to fill a quota (first option), or select the second option to enter different quota quantities for each Subgroup! *NOTE:* When you choose different quota per Subgroup, you enter those quantities on the next screen.

5. Select how your members will accept your request: Touch-tone Response or Transfer*.
*NOTE: Hot Transfer and Answering Machine Flexibility (AnswerFlex) are optional features. Hot Transfer allows your members to press the key you choose on their touch-tone keypad. Upon pressing the appropriate key, the system then transfers them to a phone number. When a member chooses to transfer, that is considered an accept response. Answering Machine Flexibility lets you choose when or if you want to leave a message for your members on their answering machine or voice mail. For more information on these features, search the Help & Support Center.
6. If you selected in the previous step to enter a different quota for different Subgroups, you enter those quota requirements on this screen, then click the Next button:

Select Your Contacts

- Select Subgroup(s) ○ Send to All Members

* Select your Subgroup(s):

<table>
<thead>
<tr>
<th>Subgroup Number</th>
<th>Subgroup Name</th>
<th>Contact Quota</th>
<th>Numbers</th>
<th>Phones</th>
<th>Active Emails</th>
<th>Receive Text Msg</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>Supervisors</td>
<td>2</td>
<td>70</td>
<td>237</td>
<td>79</td>
<td>79</td>
</tr>
<tr>
<td>☐</td>
<td>Emergency Responders</td>
<td>4</td>
<td>5</td>
<td>15</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>☐</td>
<td>Nurses</td>
<td>2</td>
<td>8</td>
<td>24</td>
<td>8</td>
<td>8</td>
</tr>
</tbody>
</table>

Select how many members you need to fill your quota for each Subgroup and enter it in the Contact Quota column.

7. Select when you want to send your message.


Delivery Date and Time

- * Start Date: 9/27/2011
- Enable 24 Hour Call Initiation
- * Start Hour: 6:00 AM
- * End Hour: 8:30 PM
- Continue next day

Note: Messages cannot be scheduled for past dates and can only be scheduled for 6 months in advance.

Your Local Time is 9/27/2011 9:24 AM

To save this message for future use, check this box and fill in a Code and Name for your message. Messages saved in this way can be found under Messaging and then Saved Messages on the Group Leader menu.

8. To Save your message for future use, check the box next to “I would like to save this message for future use” then enter a Message Code (Maximum of 8 digits) and Message Name for your message.
(a description is included to enter more information about your message for future reference. The message will be saved for future use in Saved Messages. More information on Saved Messages is available at the One Call Now Help & Support Center.

9. Click the Send or Save and Send button to send your message.

For more information on viewing your call results, refer to the Message Report Guide.