

A User Guide On -

DeepCall Agent Campaigns

Author(s): Tanuj Gupta
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Agent Campaigns

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Campaign List - All Outbound Campaigns

Campaign	Proactive	Time Setting	Report	Status
#20429 test 16-Dec-2023 7:55:15 PM More Info	OFF	16-Dec-2023 7:55 PM SUN MON TUE WED THU FRI SAT 12:00 AM TO 11:59 PM	Dialed 0 Fresh 0 Retry 0 Remaining 2 Fresh 0 Retry 0	Running Total Contacts 2/4 2/4 Ans. By Agent 0 Missed By Agent 0 Ans. By Cust. 0 Missed By Cust. 0 Skipped 0
#20428 mahi New 16-Dec-2023 7:04:22 PM More Info	ON	16-Dec-2023 7:04 PM SUN MON TUE WED THU FRI SAT 12:00 AM TO 11:59 PM	Dialed 2 Fresh 2 Retry 0 Remaining 0 Fresh 0 Retry 0	Running Total Contacts 2/2 2/2 Ans. By Agent 1 Missed By Agent 1 Ans. By Cust. 1 Missed By Cust. 0 Skipped 0
#20427 mahi test 16-Dec-2023 6:32:06 PM More Info	ON	16-Dec-2023 6:32 PM SUN MON TUE WED THU FRI SAT 12:00 AM TO 11:59 PM	Dialed 6 Fresh 6 Retry 0 Remaining 0 Fresh 0 Retry 0	Paused Total Contacts 6/1 6/1 Ans. By Agent 0 Missed By Agent 6 Ans. By Cust. 0 Missed By Cust. 0 Skipped 0

Basic Details

CAMPAIGN

Campaign ID & Campaign Name are used for easy search & specification of each campaign.

It shows the date and time of the campaign when it was created.

More Info-

- When you click on the “More Info” tab, pop-up flashes on the screen.
- You can click on IVR ID as it can be clickable to see the IVR flow.
- By clicking on Agent, you can view the contact list used & segmentation applied.
- The name of the Group or Agents who are assigned to the campaign can be viewed.
- Agent login settings are displayed for a quick brief on the same page.

The screenshot displays the 'Campaign' interface. At the top, it shows the campaign ID '#20429 test' and the creation date and time '16-Dec-2023 7:55:15 PM'. A 'More Info' button is highlighted with a white box and a white arrow pointing to the 'Campaign Other Info' pop-up window.

Campaign Other Info

IVR 52

Contact List Test_VInay

Calling By Agent

Proactive Info

Show Contact Yes

Allow to call again on a number if already called No

Only same agent can call No

Finish Setting

Manual

Agent Login Setting

Web Login Compulsory

Agent Working Time : 15 Minutes

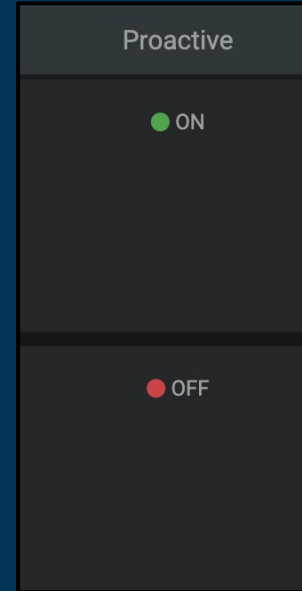
(Agent should be active for this duration to receive call. We recommend to keep it 15 mins.)

Proactive Status

PROACTIVE

Once a call is finished the next is dialed by the system automatically out of the assigned list of contacts, agent-wise.

- **ON:** If this is on, then contacts assigned to agents will be dialed one after another with a set interval automatically. An agent needs not to dial manually.
- **OFF:** Here the contacts will be assigned to the agent & the agent can call manually by clicking on the dial button one by one.



Time Settings

Here campaign is active from Monday to Friday and shows inactive on Sunday and Saturday.

- Day names highlighted are Active.
- Day names not highlighted are Inactive.

Set up time for campaigns when it's active. Like here 10 AM to 8 PM.

Time Setting

08-Apr-2021
5:19 PM

SUN MON TUE WED THU FRI SAT

🕒 10:00 AM TO 8:00 PM

Dialled Counter - Report

REPORT

- Tooltip (i) added adjacent to report for quick brief of all status of calls.
- Counters for all the statuses keep updating in real-time with the progress of the campaign.

Report ⓘ					
Dialed	0	Remaining	2	Ans.By Agent	0
Fresh	0	Fresh	0	Missed By Agent	0
Retry	0	Retry	0	Ans. By Cust.	0
				Missed By Cust.	0
				Skipped	0

Report

Dialed
Dialed call counts

Fresh
Fresh call count for calling

Retry
Retry call counts

Remaining
Remaining call counts

Answered
Answered call counts

Failed
Failed call counts

Status Section

Status of the Campaign-

- **Running:** The campaign is active & running.
- **Paused:** The campaign is paused for a fixed time.
- **Completed:** The campaign is completed.
- **Stopped:** The campaign is stopped either forcefully by the user or completed as per campaign settings.
- **Done for the Day:** The campaign is paused for the day.

Campaign **PLAY** & Campaign **STOP**

- Useful to pause, play & stop the campaign.

Search

- A Popup will help to search date-wise calling information.

More Settings

- Report
- Edit
- Update Live Call View
- Allow on Quick Call
- Dashboard
- Push Report Webhook

The screenshot displays the 'Status' section of a campaign management interface. At the top, the word 'Status' is shown in a dark header. Below it, a blue button labeled 'Running' is visible, with a gear icon and a dropdown arrow to its right. Underneath the button, the text 'Total Contacts' is followed by a yellow progress bar showing '6 / 6'. Below the progress bar are two circular icons: one with a blue play button and another with a red stop button. A search icon is located to the right of the progress bar. A white box on the right side of the interface contains a list of settings: 'Report', 'Edit', 'Update Live Call View', 'Allow on Quick Call', 'Dashboard', and 'Push Report Webhook'. Arrows point from the gear icon to this settings box, from the search icon to a search popup, and from the play/stop icons to labels 'Campaign Play' and 'Campaign Stop' respectively. The search popup is titled 'Search Wise Counter (#20427)' and features 'From' and 'To' date fields, 'Reset', and 'Search' buttons. Below these fields, a table of statistics is displayed:

Dialed	6	Remaining	1	Ans.By Agent	0
Fresh	6	Fresh	0	Missed By Agent	6
Retry	0	Retry	0	Ans. By Cust.	0
				Missed By Cust.	0
				Skipped	0

Settings - Report

- Quick Call: Click to dial the call instantly.
- Send SMS: Setup APIs to send SMS instantly.
- Add Contact: Link the contact list with the campaign & insert contact from this page.

Call Log Report 9065 420 Agent, 86 Group Selected Dec 26 5:42 PM, 2023 Today Date Range Search By

Detail Report Pending Calls Excel Excel Log

Caller Number	Time	DID Number	Campaign	Agents	Master Agent / Master Number	Call Duration	Queue Duration	Customer Duration	Total Talk Duration	Agent on Call Duration	Amount	Rec.	Status	Details
+91 [Redacted] Quick Call	5:39:40 pm 26/Dec/2023	#-1	#-1	1	#135 Shivam B	00:00:12	00:00:00	00:00:00	00:00:00	00:00:00	₹ 0	🎵	Cust. Unans - Agent Ana. IVR Flow Finished	ⓘ
+91 [Redacted] Quick Call	5:39:19 pm 26/Dec/2023	#-1	#-1	1	#1773 Akshita Khandel...	00:00:06	00:00:00	00:00:00	00:00:00	00:00:00	₹ 0	🎵	Cust. Unans - Agent IVR Flow Finish	ⓘ
+91 [Redacted] Quick Call	5:37:25 pm 26/Dec/2023	#-1	#-1	1		00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	₹ 0	🎵		ⓘ
+91 [Redacted] Quick Call	5:35:17 pm 26/Dec/2023	#-1	#-1	1	#2046 Diwaker Saraswat	00:00:51	00:00:00	00:00:21	00:00:00	00:00:00	₹ 0	🎵		ⓘ
+91 [Redacted] Quick Call	5:33:48 pm 26/Dec/2023	#-1	#-1	1	#2046 Diwaker Saraswat	00:00:35	00:00:00	00:00:00	00:00:00	00:00:00	₹ 0	🎵		ⓘ

- Dialed Number listed
- Date & Time of the Call.

- DID Number
- Type of campaign

- Clickable Agent Counter
- Master Agent-Campaign
- Master Number-Click To Call

- Call Duration: Agent Dialer – Hang Up
- Queue: Applicable in Inbound Calls (Waiting for agents to get free & take calls in the queue)
- Customer: Duration of Call after Agent-client Call patched
- Total Talk: Duration of Call after Agent-client Call patched
- Agent on Call: Agent Dialed – Hang Up

Caller Number	Time	DID Number	Campaign	Agents	Master Agent / Master Number	Call Duration	Queue Duration	Customer Duration	Total Talk Duration	Agent on Call Duration	Amount	Rec.	Status	Details
91 [redacted]	9:13:53 am 27/Dec/2023	#1	#1	1	#1773 Akshita Khandel...	00:00:13	00:00:00	00:00:00	00:00:00	00:00:00	₹0		Cust. Unans - Agent Ans. IVR Flow Finished	



Quick Call ✕

Contact Number

9689433293

+ Advance

Cancel Submit

Quick Call - From here, we can make calls from the systems.

Send SMS ✕

Send To

[redacted]

SMS Content

SMS Campaign Dheeraj

SMS in just 11 paisa
No hidden setup costs
Celebrate this Holi with us
Sary.com

[redacted]

Cancel Send SMS

Send SMS - Pre-Approved SMS Template and Sender ID.

Caller Detail ✕

Disposition

mobile *

[redacted]

FirstName *

Enter FirstName

LastName

Enter LastName

Address

Enter Address

email

Enter email

Disposition *

none

Close ADD

Caller Detail - Add a number to the desired/connected contact list.

Details

'i' Icon- Click here and it will lead to a new popup where the user can check activity on every node the call flowed from beginning to end (hang up).

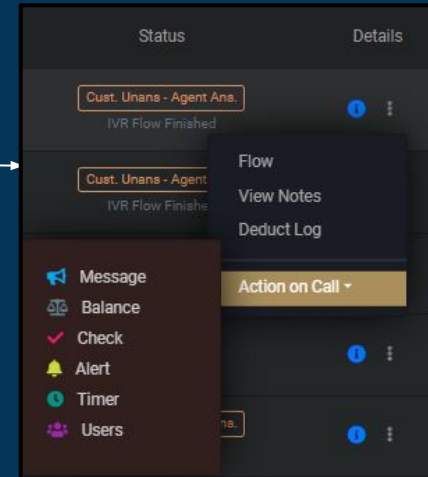
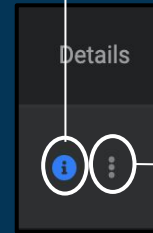
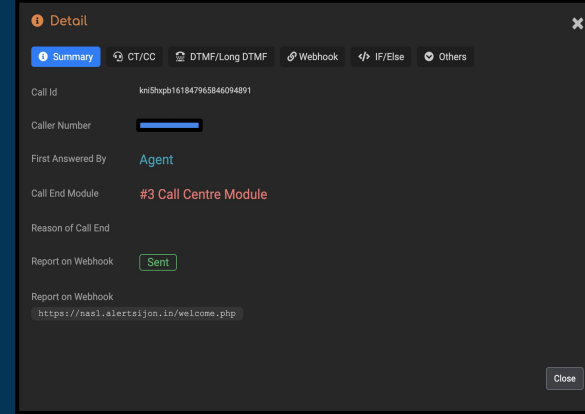
'3 Dot Icon'- Adjacent to 'i' there are 3 dots which when clicked will open more options.

Flow: Graphical flow will open to show how the call traveled in the IVR.

Deduct Log: Detail of the amount deducted for each call.

Action on Call

- Call Back, Fake, Detail, Important.
- This is completely customizable.
- User is free to add as many tags as they need to mark their call & the list will open under this option.
- From here user/agent can assign tags for future action implementation.



Caller Number	Time	DID Number	Campaign	Agents	Master Agent / Master Number	Call Duration	Queue Duration	Customer Duration	Total Talk Duration	Agent on Call Duration	Amount	Rec.	Status	Details
[Redacted]	3:43:54 pm 6/Dec/2023	#-1	#-1	1	#6428 Abhishek Rajput	00:01:03	00:00:00	00:00:56	00:00:00	00:00:00	₹ 0	🎵	Both Answered IVR Flow Finished	📄

Detail ✕

Summary | CT/CC | DTMF/Long DTMF | Webhook | IF/Else | Others

Call Id: kqftzkmp162487457469962318

Caller Number: [Redacted]

First Answered By: **Agent**

Call End Module: **#3 Call Centre Module**

Reason of Call End:

Report on Webhook: Sent

Report on Webhook: `https://nas1.alertsijon.in/welcome.php`

Close

Detail ✕

Summary | CT/CC | DTMF/Long DTMF | Webhook | IF/Else | Others

Node	Type	Agent	Answer Time	Talk Start Time	Duration	Retry	Ring Duration	Recording
#3 cc	CC	#130 Aanchal Parnami	10:03:02	🕒 15:33:08 📅 28/06/21	00:01:31	0	00:00:05	🎵

Detail ✕

Summary | CT/CC | DTMF/Long DTMF | Webhook | IF/Else | Others

Node	Type	Meta Info	Visiting Time
#2 answer	Answer This Call	✅	🕒 03:33:08 PM 📅 28/Jun/2021

There are various components of the Detail Section which are as follows-

Summary: It will show details like Caller ID, Caller Number, First Answered By, Call End Module, Reason Of Call End, and Report on Webhook(Status).

CT/CC(Cloud Telephony/Call Center): From here, the agent can access the recording and can also download it on the local device.

Click To Call: It shows the parameters that are active during the call.

DTMF/Long DTMF(Dual Tone Module Frequency): It takes the record of every node of the IVR that the customer has pressed while calling.

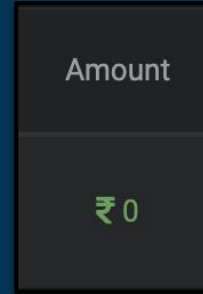
Webhook: These are automated URLs and time responses sent from here.

If/Else: It shows the IVR activity that the customer used to call the Agent.

Others: It shows the complete activity of the call from inception to end.

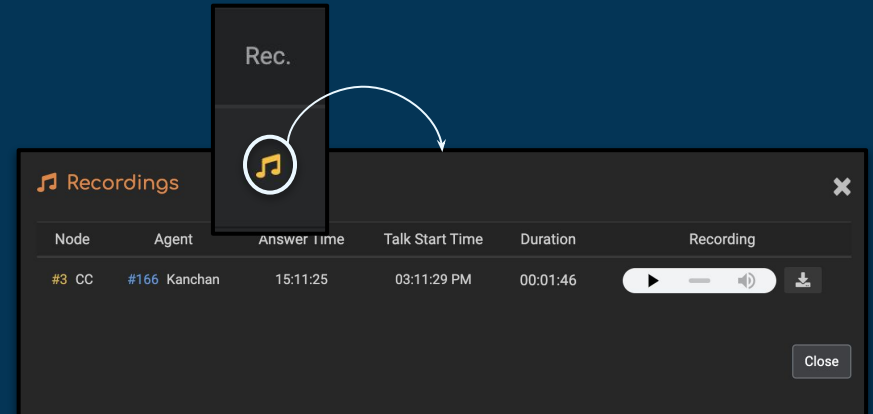
Amount

- How much amount is consumed in one call will be displayed individually for each call.
- The amount will be in Indian Rupee which will vary for each call.



Recording

- Click on the recording icon and the popup will open.
- Users can check the details.
- Listen to the conversation.
- Users can download the recording in MP3 format.



Settings - Edit

The existing settings of the campaign are open here.

Edit the settings that are required and then save it to implement the changes.

(# 283) Auto-dialer Campaign

01 Contact List 02 Choose Agent 03 Select IVR 04 Setting 05 Timing 06 Live Call View 07 Finish

Contact List

Campaign Title
Auto-dialer Campaign

Chosen Contact List
(#184) Test_VInay

Schedule This Campaign On

- Entire Contact List
- Conf Seg Test : JPR
- Conf Seg Test : Jaipur

Next

All these steps are editable

Settings - Update Live Call View

This is also the Sixth step in creating the new campaign.

This is another shortcut to edit this live call view.

Click on UPDATE to see the changes.

+ Update Live Call View (#283) ✕

Reservation_date	<input checked="" type="checkbox"/>
Address	<input checked="" type="checkbox"/>
mobile	<input checked="" type="checkbox"/>
FirstName	<input checked="" type="checkbox"/>
Remarks	<input checked="" type="checkbox"/>
Call_Status	<input checked="" type="checkbox"/>

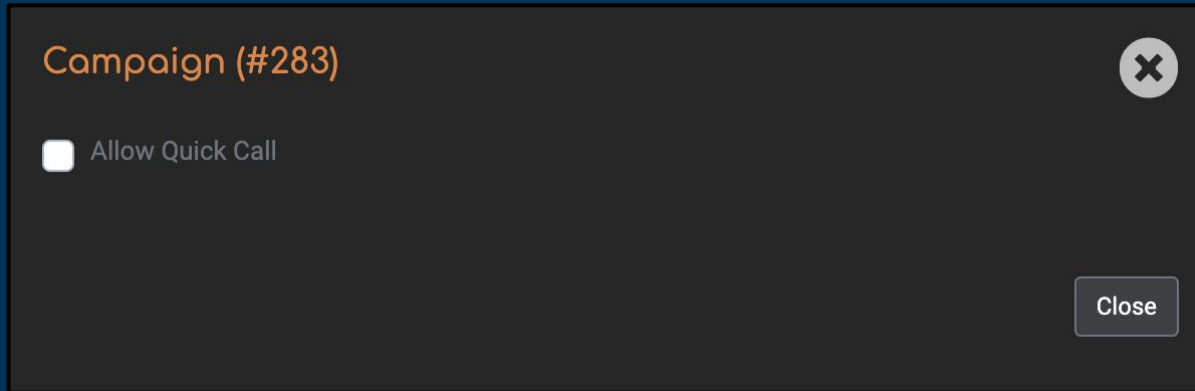
Settings - Allow on Quick Call

When allowed, the call made via quick call can be inserted into the chosen campaign.

Otherwise, the quick call logs are stored separately.

Only campaigns that are allowed on Quick Call get this facility.

This way your quick call contact gets linked with the existing campaign & saved in it.

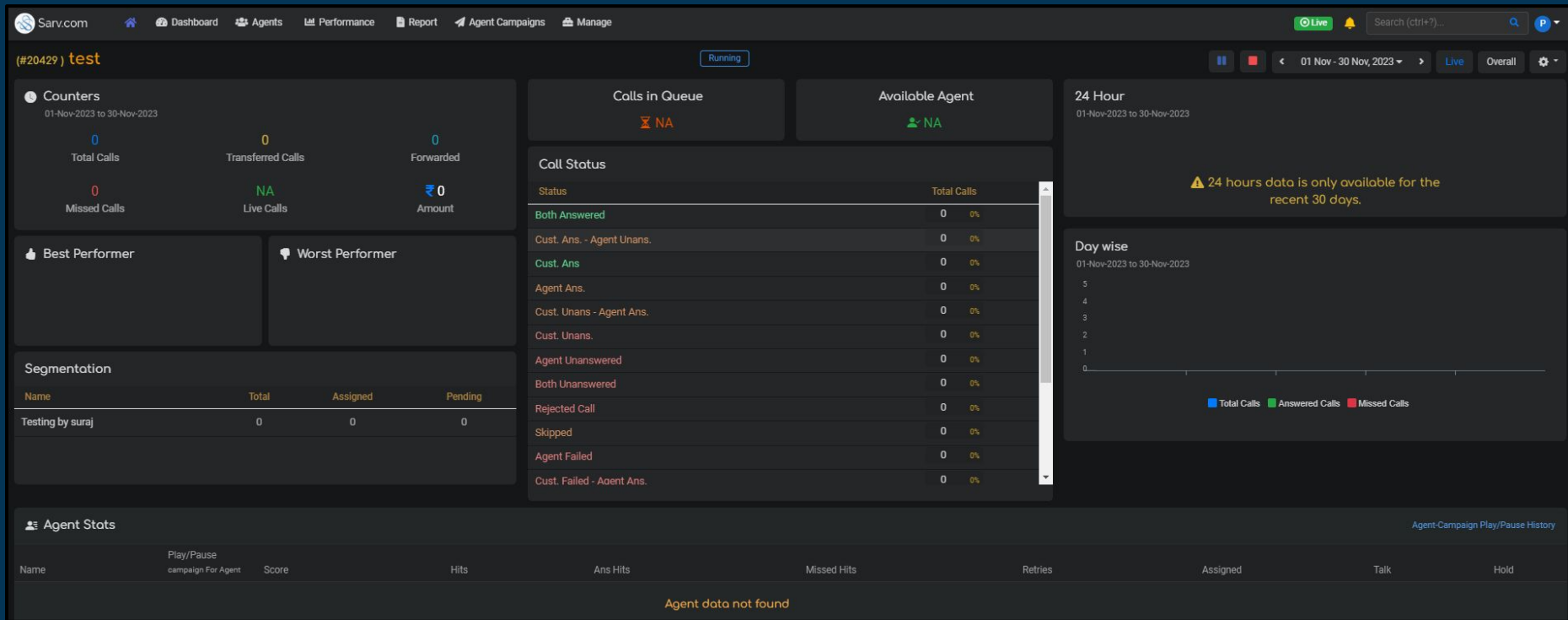


Campaign (#283) ✕

Allow Quick Call

Close

Settings - Dashboard



Settings - Dashboard - cont'd

In this, we can have the view of the complete information for any campaign in one place like-

Counter: It contains parameters like Total Calls, Transferred Calls, Forwarded, Missed Calls, Live Calls, and Amount.

Best Performer & Worst Performer: The user can check who is the best and worst performer in the entire campaign.

Segmentation: In this, the user can check the segment on the basis of fields declared at the time of contact creation.

Call Status: In this, the user can check the status of the call, like how it was responded to.

Day Wise: In this, total calls, answered calls, and missed calls are tracked as per the date range selected.

Agent Stats: There are various parameters to check the Agent activity during the date range selected.

Calls In Queue: In this, the user can view the current status of calls in the queue to get real-time data.

Available Agent: From here, the user can check the status of Agents who are available or not on the call at the moment.

Settings - Push Report Webhook

Push report webhook helps users enable reports to be pushed to the user's platform.

Set Default Webhook by following the link.

Also, users can add more webhooks and failed requests can be checked & added.

Search Filter to make the searching easy.

Push-Report Webhook 2

S.No.	Url	Create Date		
1	https://nas1.alertsijon.in/hello.php	07-Apr-2021		
2	https://nas1.alertsijon.in/welcome.php	06-Apr-2021	Active	Yes

Push Report Webhook ✕

Choose Webhook from the following list. Report of the calls for this Campaign will be sent on the selected Webhook. You can also send report on the Default Webhook that you have chosen for Campaigns. You can set Default Webhook from this [link](#).

Default

<https://nas1.alertsijon.in/hello.php>

<https://nas1.alertsijon.in/welcome.php>

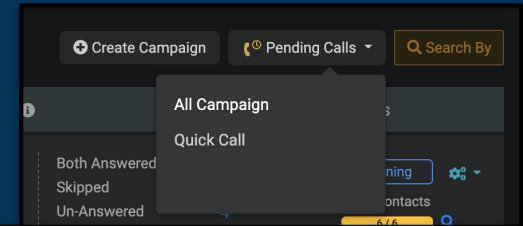
Pending Calls

All Campaign

- All calls from different campaigns processed via different IVR, IDs are listed with detailed mention of logs.

Quick Call

- Pending calls via quick call campaign.
- Take the required action.
 - Call Again
 - Delete the record



Pending Call List - 85

Caller Number	Time	Campaign	Agents	Status	Action
[Redacted]	05:57 PM Today	#195	#136 Aakash Saxena 07014490491		
[Redacted]	05:56 PM Today	#195	#179 Mohit Verma 09649393449		
[Redacted]	05:49 PM Today	#195	#431 Pragya Sharma 08426984882		
[Redacted]	05:45 PM Today	#195	#136 Aakash Saxena 07014490491		

Pending Call List **Quick Call**

Caller Number	Time	Campaign	Agents	Status	Action
[Redacted] Quick Call	03:29 PM 27/04/21	Quick Call	#939 Priya Chippa 09660302808	Call Stuck	Call Again Delete
[Redacted] Quick Call	07:11 PM 26/04/21	Quick Call	#124 Akash Kumar 09529513063		

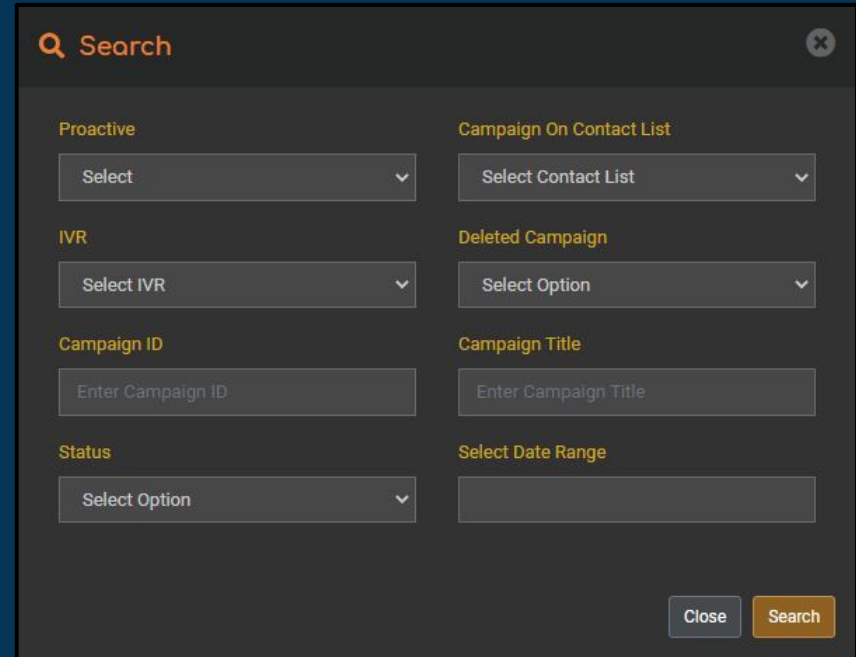
Search By

In a campaign, there are multiple parameters.

All these parameters are listed under search and selection is made very easy.

Included parameters are

- Proactive Status
- Campaign on Contact List
- IVR
- Deleted Campaign
- Campaign ID
- Campaign Title
- Status
- Select Date Range



The screenshot shows a search interface with a dark background. At the top left, there is a magnifying glass icon and the word "Search". At the top right, there is a close button (an 'x' in a circle). The interface is divided into several sections, each with a title and a corresponding input field:

- Proactive**: A dropdown menu with "Select" and a downward arrow.
- Campaign On Contact List**: A dropdown menu with "Select Contact List" and a downward arrow.
- IVR**: A dropdown menu with "Select IVR" and a downward arrow.
- Deleted Campaign**: A dropdown menu with "Select Option" and a downward arrow.
- Campaign ID**: A text input field with the placeholder "Enter Campaign ID".
- Campaign Title**: A text input field with the placeholder "Enter Campaign Title".
- Status**: A dropdown menu with "Select Option" and a downward arrow.
- Select Date Range**: A text input field.

At the bottom right, there are two buttons: a "Close" button and a "Search" button.

How to Create Campaign


















Check This Before Creating Campaign

This is the required list to create the campaign. Make sure you are checking all these points before creating the campaign.

- Do you have an active OBD plan?
- Have an IVR flow?
- Have you added agents to your account?
- Have you uploaded a contact list on which campaign will run?

This is a 7-STEP process which will be discussed in upcoming slides.

Required List for create OBD Campaign:
Hey, there! Quickly go through the below mentioned required list and confirm if below required list is completed yet or not!

	OBD PLAN Already exists in your account !!	Required	
	DUE DATE Already exists in your account !!	Required	
	OUTBOUND MODULE Already exists in your account !!	Required	
	CALL CENTRE MODULE Already exists in your account !!	Required	
	CONTACT LISTS Already exists in your account !!	Required	
	CONTACT LIST RECORD Already exists in your account !!	Required	
	IVR FLOW OBD IVR Flow not found !! IVR flow is must for processing, click the button to Create your iv flow. Please Note : CALL CENTRE Module required in IVR Flow.	Required	Create IVR
	CALL CENTRE IN IVR FLOW Need Call Centre Module in IVR Flow !! CALL CENTRE Module required in OBD IVR Flow.	Required	Check List
	AGENT Agent not found !! Agent is must for processing, click the button to Create your agent.	Required	Create Agent
--OR--			
	AGENT GROUP Already exists in your account !!	Optional	

How to create Campaign

Sarv.com Dashboard Agents Performance **1** Agent Campaigns Manage Live Search (ctrl+?)... P

Agent Campaign List **22** **2** Create Campaign Pending Calls Search By

Campaign	Proactive	Time Setting	Report	Status
#20429 test 16-Dec-2023 7:55:15 PM More Info	OFF	16-Dec-2023 7:55 PM SUN MON TUE WED THU FRI SAT 12:00 AM TO 11:59 PM	Dialed 0 Fresh 0 Retry 0 Remaining 2 Fresh 0 Retry 0 Ans. By Agent 0 Missed By Agent 0 Ans. By Cust. 0 Missed By Cust. 0 Skipped 0	Running Total Contacts 2 / 4

In the top menu bar, click 'Agent Campaign'.

Look for the 'Create Campaign' Button.

Contact List

Steps:-

- **Campaign Title:** Name your campaign.
- **Choose Contact List:** Choose your contact list from dropdown.
- **Choose contacts of current date only:** Call will be initiated on the contacts that are updated on the day of calling.
- **Priority Calling:** In this, the user is provided with the option to call in order of priority, here 1 is considered the highest priority, and 10 is considered the least priority.
 - **Ascending:** In this, the priority will be given to the contacts in the order of 1 - 10, where 1 is a high priority and 10 is the least priority.

The screenshot displays the 'Create OBD Campaign' interface. At the top, a progress bar shows seven steps: 01 Contact List (active), 02 Choose Agent, 03 Select IVR, 04 Setting, 05 Timing, 06 Live Call View, and 07 Finish. The main form area is titled 'Contact List' and contains the following fields and options:

- Campaign Title:** A text input field containing 'Demo'.
- Choose Contact List:** A dropdown menu showing 'Demo (1)'.
- Choose contacts of current date only:** An unchecked checkbox with the subtext 'Calls will be initiated on contacts that are inserted or updated on the day of calling.'
- Priority Calling:** A section with a help icon (i) and a dropdown menu set to 'Contact Creation Time'. Below it are two radio button options:
 - Ascending:** Selected. Subtext: 'Oldest created contacts will be called first.'
 - Descending:** Unselected. Subtext: 'Latest created contacts will be called first.'
- Schedule This Campaign On:** An unchecked checkbox labeled 'Entire Contact List'.
- Next:** A blue button at the bottom right of the form.

Contact List

- **Descending:** In this, the priority will be given to the contacts in the order of 10 - 1, where 10 is the least priority and 1 is the high priority.
- **Schedule This Campaign On:** If this is selected then it will work on the entire Contact List.

Create OBD Campaign

01 Contact List 02 Choose Agent 03 Select IVR 04 Setting 05 Timing 06 Live Call View 07 Finish

Contact List

Campaign Title
Demo

Choose Contact List
Demo (1)

Choose contacts of current date only
Calls will be initiated on contacts that are inserted or updated on the day of calling.

Priority Calling ⓘ

Contact Creation Time

Ascending
Oldest created contacts will be called first.

Descending
Latest created contacts will be called first.

Schedule This Campaign On

Entire Contact List

Next

Choose Agent

Agent Group

- Groups will be displayed in a dropdown to choose from the list.
- Multiple selections can be made.
- Segmentation in Agent Group is provided, user can opt for the required segments.

Agent

- A list of all agents added to the user account will be displayed in the list.
- Multiple agents can be selected.
- Segmentation in Agent is provided, user can opt for the required segments.

The screenshot displays a multi-step process titled "Create OBD Campaign". The steps are: 01 Contact List, 02 Choose Agent (current step), 03 Select IVR, 04 Setting, 05 Timing, 06 Live Call View, and 07 Finish. The "Choose Agent" step is active, showing a form with the heading "Choose Agent Group/Agent". Below the heading, there are two radio button options: "Agent Group" (selected) and "Agent". At the bottom of the form, there are "Prev" and "Next" buttons.

Select IVR

Select the IVR from the dropdown to apply in the campaign.

The screenshot shows a multi-step wizard titled "Create Campaign". The progress bar at the top indicates seven steps: 01 Contact List, 02 Choose Agent, 03 Select IVR (the current step, highlighted in blue), 04 Setting, 05 Timing, 06 Live Call View, and 07 Finish. The main content area is titled "Select IVR" and contains a label "Choose IVR" above a dropdown menu. The dropdown menu currently displays "Select" with a downward arrow. At the bottom of the form, there are two buttons: "Prev" on the left and "Next" on the right.

Settings

Proactive

- By default, this option is OFF.
- Mark it ON or OFF as per requirement, and then it will call automatically to the contacts, the user has the option to give the wrap-up time to initiate the next call.

Show Contact

- By default, the option is disabled.
- Allow agents to see the contacts(Mobile No.) assigned to them.

Allow to Call again on a number if already called

- Retry Applicable From
 - Choose to set up the retry from the date you wish to do so.
- Automatic Retry
 - Enable automatic retry
 - Set retry count

Create OBD Campaign

01 Contact List 02 Choose Agent 03 Select IVR **04 Setting** 05 Timing 06 Live Call View 07 Finish

Setting

Proactive

Show Contact

Allow to call again on a number if already called.

Retry Applicable From

Automatic Retry

Only same agent can call

Retry when all try done

Agent Login Setting

Call Login Yes N/A

Web Login Yes N/A

Web Login Ping Time in Minutes

(Agent should be active for this duration to receive call. We recommend to keep it 15 mins.)

Prev Next

- Only the same agent can call
 - Enable retry by the same agent who had called earlier on the same contact.
- Retry when all is done
 - Here agent needs to retry manually by clicking on retry.

Agent Login Settings

- **Call Login:** For calls to connect to the agent set whether call login is required or not.
- **Web Login:** For calls to connect to agent set whether web login is required or not.
- **Compulsory:** If both Call Login and Web Login are selected as Yes, then this option will be available, then we can choose either “Any One” or “Both”.
- **Web Login Ping Time:** If the web login is markey, yes, and the agent is not active for 15 min (default set) then calls will not be assigned to the agent.

Create OBD Campaign

01 Contact List 02 Choose Agent 03 Select IVR **04 Setting** 05 Timing 06 Live Call View 07 Finish

Setting

Proactive

Show Contact

Allow to call again on a number if already called.

Retry Applicable From

Automatic Retry

Only same agent can call

Retry when all try done

Agent Login Setting

Call Login Yes N/A

Web Login Yes N/A

Web Login Ping Time in Minutes

(Agent should be active for this duration to receive call. We recommend to keep it 15 mins.)

Prev Next

Distribution of Contacts

Each agent is assigned with 10 contacts at the start of the campaign. Then, the moment the agent is finished calling with the first contact, the count is left at 9. Then the system will automatically assign 1 new contact to that Agent so that the count can become 10 again.

This will go on until the campaign is finished.

When Web Login Is Enabled: Only then the agents be assigned 10 contacts.

Timing

Week Days

- Choose weekdays for which the campaign will remain active.

Working Hours

- Time duration on chosen weekdays when the campaign is active.

Start Date

- The Calendar appears to choose the start date and time.

End Date

- The Calendar appears to choose the end date and time.

Apply to save changes & click on NEXT.

Create OBD Campaign

01 Contact List → 02 Choose Agent → 03 → 04 → 05 **Timing** → 06 Live Call View → 07 Finish

Timing

Week Days: THU, FRI, SAT

Working Hours: From 9:18 AM TO 0 Hour 0 Minute

Start Date: [Date]

End Date: [Date]

If selected time is less than current time then we will use current time.

Prev Next

Live Call View

The contact list linked with the campaign carries multiple columns/custom fields.

All those fields will appear, choose from the list.

Chosen fields will be visible to an agent in the Contact form & the rest will remain hidden.

01 Contact List 02 Choose Agent 03 Select IVR 04 Setting 05 Timing 06 Live Call View 07 Finish

Live Call View

Select Field for Live Call View

mobile	<input type="checkbox"/>
LastName	<input checked="" type="checkbox"/>
FirstName	<input checked="" type="checkbox"/>
Lead_Status_List	<input checked="" type="checkbox"/>
Address	<input checked="" type="checkbox"/>
DOB	<input checked="" type="checkbox"/>

Prev Next

Finish

Confirm the Finish Settings of the campaign-

- **Manual:** The Campaign needs to be paused/stopped manually.
- **If Idle for more than 1 Month:** In this case, after 1 month, the campaign will be stopped automatically.
- **Time is Over:** If the end time is set then the campaign will be finished on the decided date & time.
- **Achieved Max Call Answered:** Fill in the counter of calls, the user wants to set for agents. Once this is achieved the campaign will be marked Finished.
- **Achieved Max Count of Specific Tag:** Set up the counter of any tag. Agents mark the call records with the tag & once the counter is reached, the campaign will be stopped by the system automatically.

The count should be considered as

- **Per Day Basis:** Max call counter to be considered on a day basis.
- **Overall Basis:** When the added count of calls is achieved, the campaign will be stopped.

Create Campaign

01 Contact List 02 Choose Agent 03 Select IVR 04 Setting 05 Timing 06 Live Call View 07 **Finish**

Finish

Finish The Campaign When

- Manual
- If idle more than 1 month
- Time Is Over
- Achieved Max Call Answered

Fill Answer Count

- Achieved Max Count of Specific Tag

Select Tag Max Count

Count should be considered as

- Per day basis
- Overall basis

Campaign will be paused for that day

Prev Save