

# DeepCall IVR Campaigns



A User Guide By DeepCall



# Campaigns

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# Check This Before Creating Campaign

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

- Do you have active OBD plan?
- Have an IVR flow?
- Have you added agents to your account?
- Have you uploaded 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!

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

# How to Create Campaign

The screenshot shows the DeepCall dashboard with the 'Campaigns' menu highlighted in the top navigation bar (marked with a yellow circle '1'). An arrow points from this menu to the 'Create Campaign' button in the 'Campaign List' header (marked with a yellow circle '2').

Campaign	Proactive	Time Setting	Report	Status
#6798 Aurangabad 05-Sep-2022 11:53:22 AM <a href="#">More Info</a>	ON	05-Sep-2022 11:53 AM SUN MON TUE WED THU FRI SAT 9:05 AM TO 7:11 PM	Dialed 15 Fresh 15 Retry 0 Remaining 4924 Fresh 0 Retry 0	Ans.By Agent 3 Missed By Agent 4 Ans. By Cust. 2 Missed By Cust. 9 Skipped 0 Paused Total Contacts 11 / 4935

In the top menu bar, click 'Campaign'.

Look for 'Create Campaign' Button.

# Contact List

Very first step is to

- Name your campaign
- Choose your contact list from dropdown
- If segmentation is added in the contact list then it will be displayed once contact list is chosen
- Choose segmentation from the list & it will be applied

The screenshot displays the 'Create Campaign' workflow with seven steps: 01 Contact List, 02 Choose Agent, 03 Select IVR, 04 Setting, 05 Timing, 06 Live Call View, and 07 Finish. Step 01 is active. The form includes a 'Campaign Title' field with 'ffd', a 'Choose Contact List' dropdown with 'Test\_Vinay (6)', and a 'Schedule This Campaign On' section with three options: 'Entire Contact List', 'Conf Seg Test : JPR', and 'Conf Seg Test : Jaipur'. A 'Next' button is located at the bottom right.

# Choose Agent

## Agent Group

- Groups will display in dropdown to choose from the list
- Multiple selection can be done

## Agent

- List of all agents added in user account will display in list.
- Multiple agents can be selected.

## Default As Per IVR Flow

- If user have added agent in the IVR flow itself then selection according to IVR flow is setup in default section.
- Answer count setup option available.

The image displays three sequential screenshots of the 'Create Campaign' wizard, specifically the 'Choose Agent Group/Agent' step. Each screenshot shows a progress bar at the top with steps 01 to 07, where step 02 'Choose Agent' is highlighted. Below the progress bar, there are three radio button options: 'Agent Group', 'Agent', and 'Default As Per IVR Flow'. In the first screenshot, 'Agent Group' is selected, and a dropdown menu shows 'Test\_Group'. In the second screenshot, 'Agent' is selected, and a dropdown menu shows 'lanchan'. In the third screenshot, 'Default As Per IVR Flow' is selected, and there is a 'Per hour call' section with an 'Answer Count' input field. Yellow arrows from the text above point to the selected radio button in each screenshot.



# Select IVR

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

The screenshot displays a 'Create Campaign' wizard with seven steps: 01 Contact List, 02 Choose Agent, 03 Select IVR, 04 Setting, 05 Timing, 06 Live Call View, and 07 Finish. Step 03 is the active step. Below the progress bar, the 'Select IVR' screen is shown with a dropdown menu labeled 'Choose IVR' and a 'Select' button. At the bottom, there are 'Prev' and 'Next' navigation buttons.

# Settings

## Proactive

- By default this option is OFF
- Mark it ON or Off as per requirement

## Show Contact

- By default the option is disabled
- Allow agents to see the contacts assigned to them

## Allow to retry a Contacts from a particular date

- Choose to setup retry setting
- Automatic Retry
  - Enable automatic retry
  - Set retry count
- Manual retry
  - Here agent need to retry manually by clicking on retry
- Only same agent can call
  - Enable retry by the same agent who had called earlier on the same contact

**Create 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

Manual Retry

Only same agent can call

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.)

## Agent Login Settings

- Call Login: For calls to connect to 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
- Web Login Ping Time: if web login is markey yes, and the agent is not active since 15 min (default set) then calls will not be assigned to the agent.

**Create 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

Manual Retry

Only same agent can call

**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.)

# Timing

## Week Days

- Choose week days for which campaign will remain active

## Working Hours

- Time duration on chosen weekdays when the campaign is active

## Start Date

- Calendar appears to choose start date and time

## End Date

- Calendar appears to choose end date and time

Apply to save changes & click on NEXT.

The screenshot shows the 'Create Campaign' interface with a progress bar at the top indicating steps 01 to 07. Step 05, 'Timing', is currently active. Below the progress bar, there are several sections for configuring the campaign's timing:

- Week Days:** A calendar is open, showing the month of April 2021. The date 29 is selected. The days of the week are labeled Su, Mo, Tu, We, Th, Fr, Sa.
- Working Hours:** A section for selecting the days of the week for which the campaign is active. The days THU, FRI, and SAT are currently selected.
- Start Date:** A section for selecting the start date and time. The start date is set to 7, the time is 40, and the period is PM.
- End Date:** A section for selecting the end date and time. The end date is currently blank.

At the bottom of the interface, there are 'Prev' and 'Next' buttons. The 'Next' button is highlighted in blue, indicating it is the next step in the process.

# Live Call View

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Contact list linked with the campaign carry multiple columns/custom fields

All those fields will appear, choose from list

Chosen fields will be visible to an agent in Contact form & rest will be 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:** 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 setup then campaign will be finished on the decided date & time
- **Achieved Max Call Answered:** Fill in the counter of calls, 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 system automatically

Count should be considered as

- **Per Day Basis:** Max call counter to be considered on a day basis
- **Overall Basis:** When 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
- 
- Achieved Max Count of Specific Tag

Select Tag

Count should be considered as

- Per day basis
- Overall basis

Campaign will be paused for that day

# Campaign List - All Outbound Campaigns

## Campaign List 11

Create Campaign

Pending Calls

Search By

Campaign	Proactive	Time Setting	Report	Status
<b>#283 Auto-dialer Campaign</b> 08-Apr-2021 5:19:57 PM <a href="#">More Info</a>	ON	08-Apr-2021 5:19 PM SUN MON TUE WED THU FRI SAT 10:00 AM TO 8:00 PM	Dialed 6 Fresh 6 Retry 0 Remaining 0 Fresh 0 Retry 0 Both Answered 2 Skipped 0 Un-Answered 4	Running Total Contacts 6/6
<b>#282 demo campaign (Mohit)</b> 08-Apr-2021 4:32:43 PM <a href="#">More Info</a>	OFF	08-Apr-2021 4:32 PM SUN MON TUE WED THU FRI SAT 11:00 AM TO 7:00 PM	Dialed 0 Fresh 0 Retry 0 Remaining 0 Fresh 0 Retry 0 Both Answered 0 Skipped 0 Un-Answered 0	Running Total Contacts 0/3
<b>#278 Conf Demo</b> 05-Apr-2021 5:26:08 PM <a href="#">More Info</a>	OFF	05-Apr-2021 5:26 PM SUN MON TUE WED THU FRI SAT 10:00 AM TO 8:00 PM	Dialed 1 Fresh 1 Retry 0 Remaining 5 Fresh 0 Retry 0 Both Answered 1 Skipped 0 Un-Answered 0	Running Total Contacts 1/5

# Basic Details

## CAMPAIGN

Campaign ID & Campaign Name used for easy search & specificity of each campaign

Date & Time when campaign was created

More Info

- Pop-up flashes
- IVR ID & Clickable IVR to see the IVR flow
- Contact List used & segmentation applied
- Name of Group or Agents who are assigned to the campaign
- Agent login settings are displayed for a quick brief on same page.

The screenshot displays a user interface for a campaign. At the top, it shows 'Campaign' followed by '#283 Auto-dialer Campaign'. Below this, the creation date '08-Apr-2021' and time '5:19:57 PM' are shown. A 'More Info' button is highlighted with a white box and a white arrow pointing to a 'Campaign Other Info' pop-up window. The pop-up window contains the following information:

- 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 (checked)
- Agent Login Setting**:
  - Web Login Compulsory (checked)
  - Agent Working Time : 15 Minutes (checked)
  - (Agent should be active for this duration to receive call. We recommend to keep it 15 mins.)



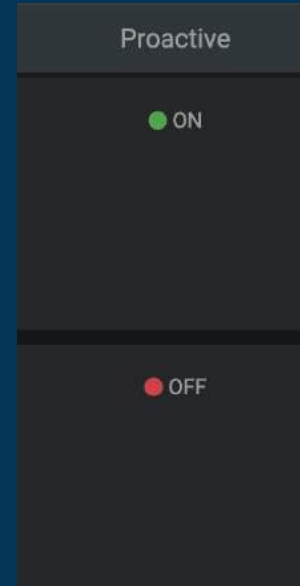
# Proactive Status

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## PROACTIVE

One call is finished the next is dialed by 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. Agent need not to dial manually
- **OFF:** Here the contacts will be assigned to agent & agent can call manually by clicking on dial button one by one.



# Time Settings

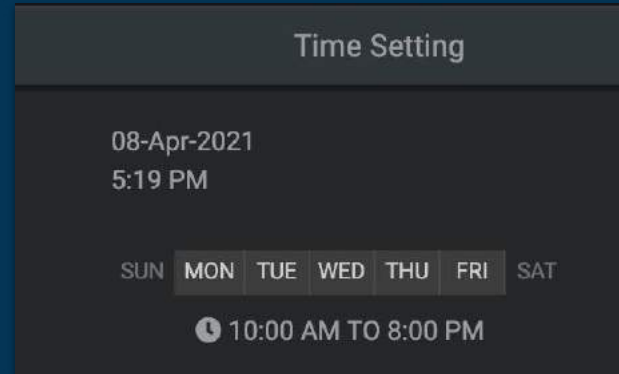
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Week Days when the campaign will be active & when it will be inactive.

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

- Day Name highlighted are Active
- Day Name not highlighted are Inactive

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



# Dialled Counter - Report

## REPORT

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

Report ⓘ					
Dialed	6	Remaining	0	Both Answered	2
Fresh	6	Fresh	0	Skipped	0
Retry	0	Retry	0	Un-Answered	4

## 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

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

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

- Useful to pause, play & stop campaign

## Search

- Popup will help search day/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 the application. At the top, the status is 'Running'. Below it, 'Total Contacts' is shown as '6 / 6'. There are three main interaction areas: a settings gear icon, a search icon, and a play/stop control. The settings gear icon is linked to a menu with options: Report, Edit, Update Live Call View, Allow on Quick Call, Dashboard, and Push Report Webhook. The search icon is linked to a 'Search Wise Counter' popup. The play/stop control is linked to 'Campaign Play' and 'Campaign Stop' options.

**Search Wise Counter**

From: [From Date] To: [To Date] [Reset] [Search]

Dialed	6	Remaining	0	Both Answered	2
Fresh	6	Fresh	0	Skipped	0
Retry	0	Retry	0	Agent Un-Answered	4

# Settings - Report

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

Call Log Report Campaign #283 (6) 40 Agent, 36 Group Selected < Apr 28, 2021 > Today Date Range Search By Reset Filter

Detail Report Pending Calls Excel

Caller Number	Time	Agents	Master Agent/ Master Number	Call Duration	Queue Duration	Customer Duration	Total Talk Duration	Agent on Call Duration	Amount	Rec.	Status	Details
[Redacted] Campaign	03:10:58 PM 15/Apr/2021	1	#166 Kanchan	00:01:51 Tag -	00:00:00	00:01:47	00:01:47	00:01:51	₹ 0		Both Answered	[Icons]
[Redacted] Campaign	03:09:58 PM 15/Apr/2021	1	#166 Kanchan	00:00:07 Tag -	00:00:00	00:00:03	00:00:03	00:00:07	₹ 0			[Icons]
[Redacted] Campaign	03:08:58 PM 15/Apr/2021	0	#166 Kanchan	00:00:00 Tag -	00:00:00	00:00:00	00:00:00	00:00:00	₹ 0			[Icons]

- Dialed Number listed
- Type of campaign
  - Campaign
  - Click To Call
- Clickable Agent Counter
- Master Agent- Campaign
- Master Number- Click To Call
- Call Duration: Agent Dialer -- Hang Up
- Queue: Applicable in Inbound Call (Waiting for agents to get free & take calls in 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

# Details

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

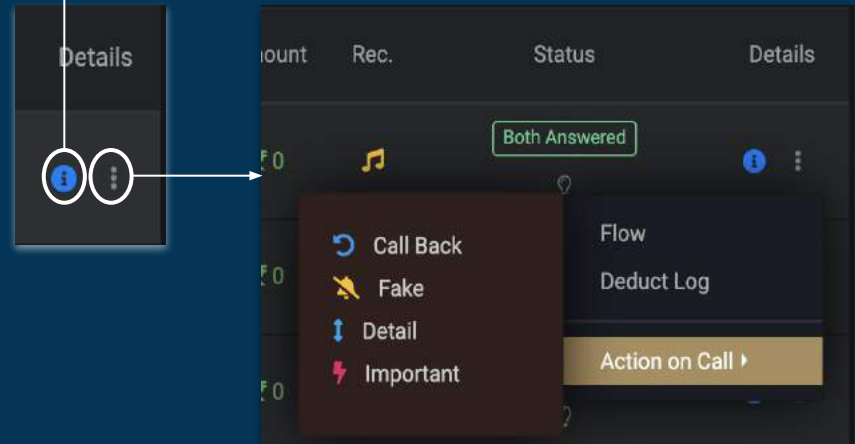
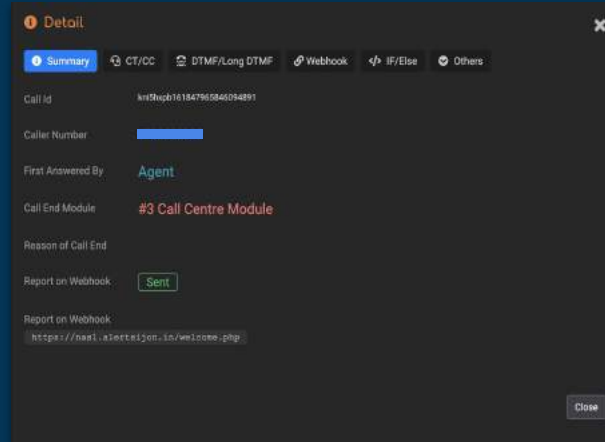
**'3 Dot Icon'**- Adjacent to 'i' there are 3 dots which when clicked will open more options

**Flow:** Graphical flow will open to show how call travelled in the IVR

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

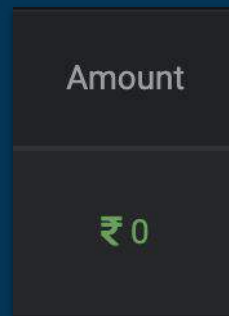
**Action on Call**

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



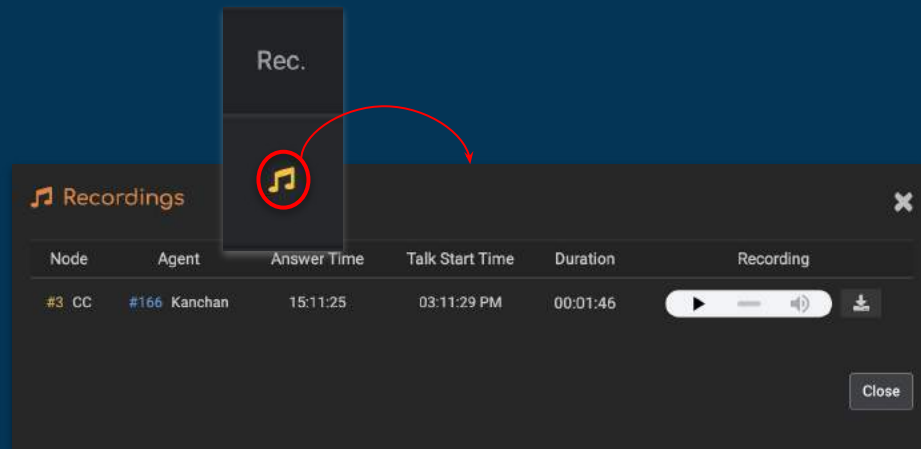
## Amount

- 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 popup will open
- User can check the details
- Listen to the conversation
- User can download the recording in MP3 format.



# Settings - Edit

The existing settings of the campaign opens here.

Edit the settings which 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

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Sixth step of the campaign

This is another shortcut to edit this live call view

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


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

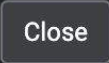
Otherwise, the quick call logs are stored separately

Only campaigns which are allowed on Quick Call get this facility

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

Campaign (#283) 

Allow Quick Call



# Settings - Push Report Webhook

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

Set Default Webhook by following the link

Also, user can add more webhooks and failed request can be checked & added

Search Filter to make the searching easy

Push-Report Webhook 2

S.No.	Url	Create Date	Statu
1	<a href="https://nas1.alertsijon.in/hello.php">https://nas1.alertsijon.in/hello.php</a>	07-Apr-2021	Acti
2	<a href="https://nas1.alertsijon.in/welcome.php">https://nas1.alertsijon.in/welcome.php</a>	06-Apr-2021	Active <span>Yes</span>

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>

Cancel Submit

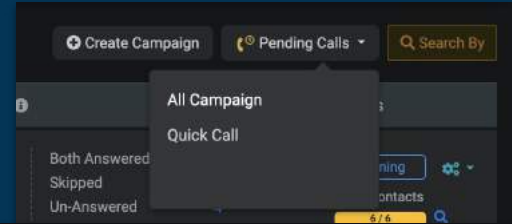
# Pending Calls

## 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 required action
  - Call Again
  - Delete the record



Pending Call List - 85

Caller Number	Time	Campaign	Agents	Status	Action
[Redacted]	06:57 PM Today	#195	#136 Akash Saxena 07014490491		
[Redacted]	09:56 PM Today	#195	#179 Mohit Verma 09649393449		
[Redacted]	09:49 PM Today	#195	#431 Pragna Sharma 08426994802		
[Redacted]	09:45 PM Today	#195	#136 Akash 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

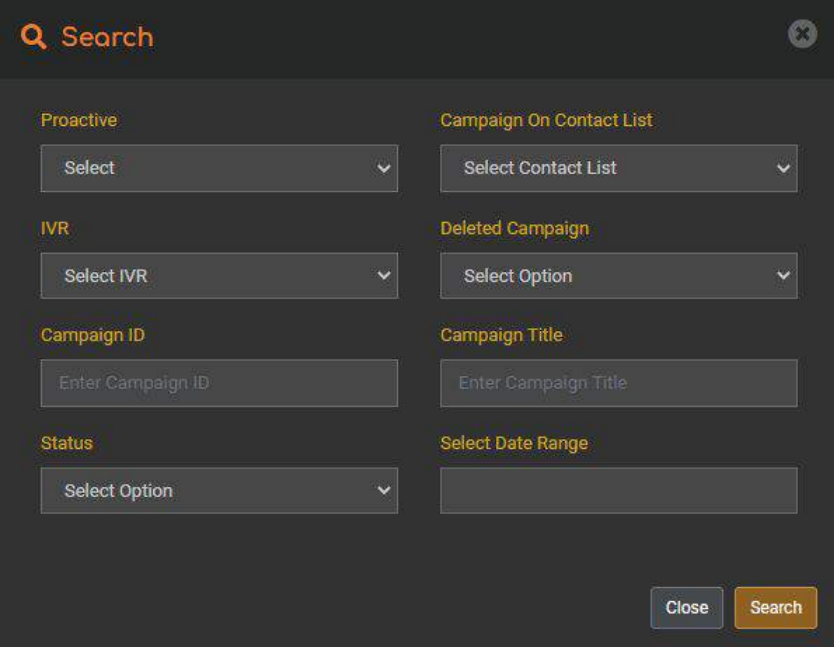
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In a campaign there are multiple parameters

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" in orange. At the top right, there is a close icon (an 'x' in a circle). The interface is divided into several sections, each with a title in orange 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.