

EVOLVE CONTACT

How to Handle Outbound Campaign Interactions

Accepting a New Campaign Call



6463501848	
<input checked="" type="checkbox"/>	Type: Campaign Telephony
<input type="checkbox"/>	State: New Interaction
<input type="checkbox"/>	Customer: John Doe
<input type="checkbox"/>	Campaign: Test
<input type="checkbox"/>	Entry Time: 3:39 AM
<input type="checkbox"/>	Origin: Agent 3
<input checked="" type="checkbox"/>	Destination: 6463501848
<input type="checkbox"/>	Business Process: Sales
<input type="checkbox"/>	Demands: Handle Progressive Dialer
<input type="checkbox"/>	Waiting Time: 00:00:00
<input type="checkbox"/>	Remarks: 0
<input type="checkbox"/>	Links: Customer Mng. Location Product
<input type="checkbox"/>	Previous Attempts: 0 previous attempts
<input type="checkbox"/>	Completion status: Handled
<input type="checkbox"/>	Disposition Code: [Dropdown]

Accept: Click to accept the campaign offered interaction

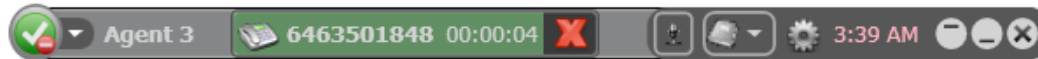
Decline: Click to decline the interaction and return it to the queue

Indicates that this is a campaign call

Customer name

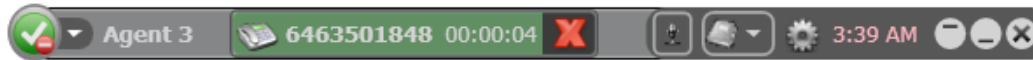
Customer dialed phone number

Handling The Call



A screenshot of a call handling interface. At the top, it shows the call ID '6463501848' and a timer '00:00:04'. Below this is a list of call details with icons on the left and text on the right. The details include: Type (Campaign Telephony), State (Handling), Customer (John Doe), Campaign (Test), Entry Time (3:39 AM), Origin (Agent 3), Destination (6463501848), Business Process (Sales), Demands (Handle Progressive Dialer), Waiting Time (00:00:00), Remarks (1), and Links (customer name: Kathy Green; home address: 330 Madison Avenue; customer city: New York; state code: NY; zip: 10016). Below the details is a section for 'Previous Attempts' with a text area 'Write Here...' and a button 'Add Remark'. At the bottom, there is a 'Telephony Sessions' section with a green bar showing the call ID '6463501848' and a timer '00:00:05' with a red 'X' icon.

Remarks: Contains all the customer info, required during the campaign call. Click to open the combo box.



6463501848 00:00:04

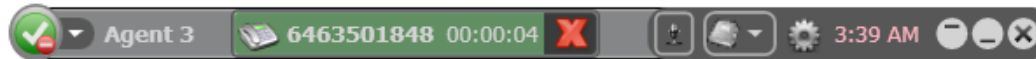
✓	Type	Campaign Telephony
✗	State	Handling
	Customer	John Doe
	Campaign	Test
	Entry Time	3:39 AM
	Origin	Agent 3
✗	Destination	6463501848
➔	Business Process	Sales
●	Demands	Handle Progressive Dialer
	Waiting Time	00:00:00
	Remarks	0
	Links	Customer Mng. Location Product
	Previous Attempts	0 previous attempts
	Completion status	Handled
	Disposition Code	

123 00:00:05

Click to start recording of the call

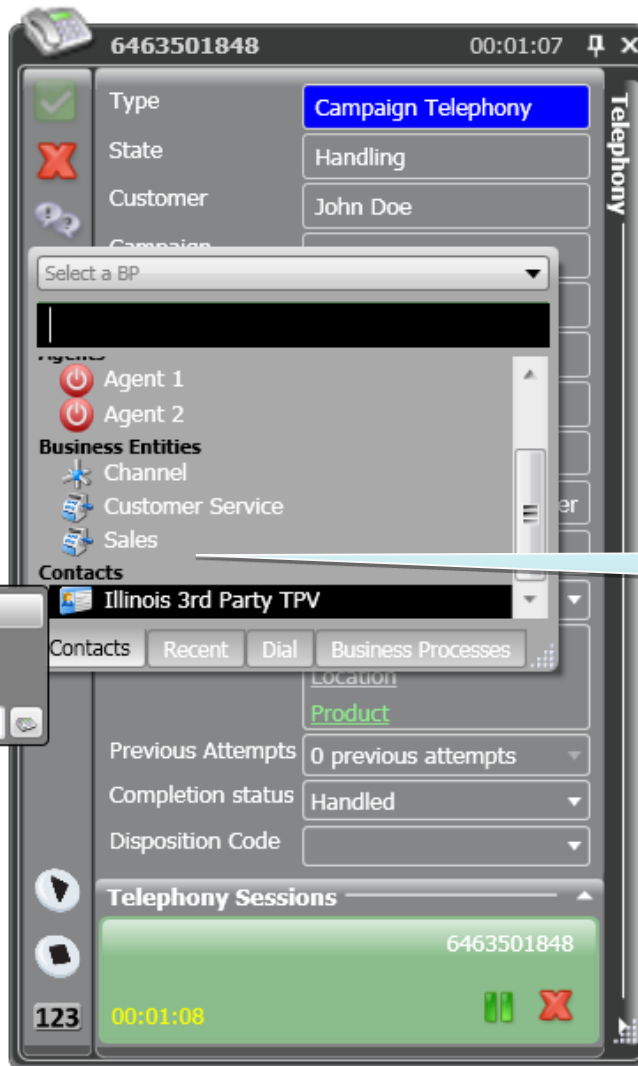
Links: Once defined, used to launch any required web pages, such as call script, catalog product page, CRM tickets, social application and more...

Attended Transfer to a Third Party

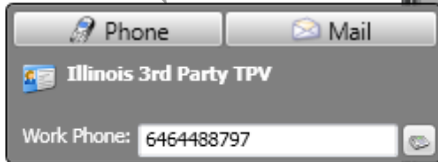
A call details window for call ID 6463501848. The window has a title bar with the call ID and a timer '00:00:04'. On the left is a vertical toolbar with icons: a green checkmark, a red X, a headset, a person with a plus sign, a person with a minus sign, a red X, a green arrow, and an orange circle. The main area contains a list of call attributes: Type (Campaign Telephony), State (Handling), Customer (John Doe), Campaign (Test), Entry Time (3:39 AM), Origin (Agent 3), Destination (6463501848), Business Process (Sales), Demands (Handle Progressive Dialer), Waiting Time (00:00:00), Remarks (0), Links (Customer Mng., Location, Product), Previous Attempts (0 previous attempts), Completion status (Handled), and Disposition Code. At the bottom is a 'Telephony Sessions' section showing a session for 6463501848 with a timer '00:00:05' and a red X icon. A light blue callout bubble points to the green arrow icon in the toolbar.

Type	Campaign Telephony
State	Handling
Customer	John Doe
Campaign	Test
Entry Time	3:39 AM
Origin	Agent 3
Destination	6463501848
Business Process	Sales
Demands	Handle Progressive Dialer
Waiting Time	00:00:00
Remarks	0
Links	Customer Mng. Location Product
Previous Attempts	0 previous attempts
Completion status	Handled
Disposition Code	

Consult: Click on the consult button to initiate a consult call (prior to transfer)



Click the Phone button to call the desired contact for consultation



Select the relevant contact from the Contacts list

6463501848 00:01:45

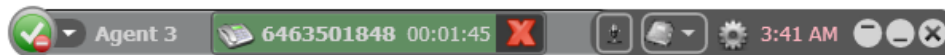
Type	Campaign Telephony
State	Consulting
Customer	John Doe
Campaign	Test
Entry Time	3:39 AM
Origin	Agent 3
Destination	6463501848
Business Process	Sales
Demands	Handle Progressive Dialer
Waiting Time	00:00:00
Remarks	0
Links	Customer Mng. Location Product
Previous Attempts	0 previous attempts
Completion status	Handled
Disposition Code	

Telephony Sessions

6463501848	00:01:46	▶▶▶
6464488757	00:00:08	▶▶▶

Pink color - Indicates that the customer is on hold

Green color - Indicates that the active call is the consult call



6463501848 00:01:45

Type	Campaign Telephony
State	Consulting
Customer	John Doe
Campaign	Test
Entry Time	3:39 AM
Origin	Agent 3
Destination	6463501848
Business Process	Sales
Demands	Handle Progressive Dialer
Waiting Time	00:00:00
Remarks	0
Links	Customer Mng. Location Product
Previous Attempts	0 previous attempts
Completion status	Handled
Disposition Code	

Telephony Sessions

6463501848	00:01:46	▶▶▶
6464488797	00:00:08	▶

123

Click on the "123" button if you are prompted for digits selection (DTMF)

6463501848 00:02:01

Type Campaign Telephony

State Consulting

Customer John Doe

Campaign Test

Entry Time 3:39 AM

Origin Agent 3

Destination 6463501848

Business Process Sales

Demands Handle Progressive Dialer

Waiting Time 00:00:00

Remarks 0

Links Customer Mng.
Location
Product

Previous Attempts 0 previous attempts

Completion status Handled

Disposition Code

Telephony Sessions

6463501848	00:02:02	▶▶▶
6464488797	00:00:24	▶



Click on the keypad number/s that you wish to select. PC keyboard can be used as well

Agent 3 6463501848 00:02:29 X 3:42 AM

6463501848 00:02:29

Type Campaign Telephony

State Consulting

Customer John Doe

Campaign Test

Entry Time 3:39 AM

Origin Agent 3

Destination 6463501848

Business Process Sales

Demands Handle Progressive Dialer

Waiting Time 00:00:00

Remarks 0

Links Customer Mng.
Location
Product

Previous Attempts 0 previous attempts

Completion status Handled

Disposition Code

Telephony Sessions

6463501848	00:02:30	▶▶▶
6464488797	00:00:52	▶▶▶

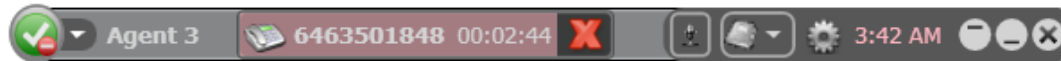
Click here to transfer the call to the person you are consulting with

Complete The Interaction

A vertical form titled '6463501848' with a timer '00:00:04'. The form contains several fields with icons to their left: a green checkmark for 'Type' (Campaign Telephony), a red 'X' for 'State' (Handling), a speech bubble for 'Customer' (John Doe), a speech bubble for 'Campaign' (Test), a person icon for 'Entry Time' (3:39 AM), a person icon for 'Origin' (Agent 3), a red 'X' for 'Destination' (6463501848), a green arrow for 'Business Process' (Sales), an orange circle for 'Demands' (Handle Progressive Dialer), and a dropdown for 'Waiting Time' (00:00:00). There is also a 'Remarks' dropdown (0) and a 'Links' section with 'Customer Mng.', 'Location', and 'Product'. At the bottom, there are 'Previous Attempts' (0 previous attempts), 'Completion status' (Handled), and 'Disposition Code' dropdowns. A 'Telephony Sessions' section at the bottom shows a session for '6463501848' with a timer '00:00:05' and status icons.

Click here to complete the interaction

Wrapping Up The Interaction



6463501848 00:02:44	
Type	Campaign Telephony
State	Wrap Up
Customer	John Doe
Campaign	Test
Entry Time	3:39 AM
Origin	Agent 3
Destination	6463501848
Business Process	Sales
Demands	Handle Progressive Dialer
Waiting Time	00:00:00
Remarks	0
Links	Customer Mng. Location Product
Previous Attempts	0 previous attempts
Completion status	Handled
Disposition Code	

Telephony Sessions

Indicates that the call has ended, and you are currently wrapping up the interaction

Agent 3 6463501848 00:03:01 3:42 AM

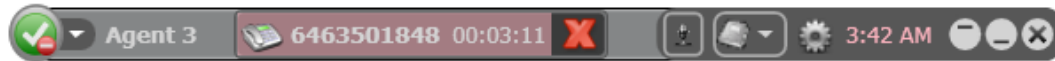
6463501848 00:03:01

✓	Type	Campaign Telephony
✗	State	Wrap Up
	Customer	John Doe
	Campaign	Test
	Entry Time	3:39 AM
	Origin	Agent 3
✗	Destination	6463501848
	Business Process	Sales
	Demands	Handle Progressive Dialer
	Waiting Time	00:00:00
	Remarks	0
	Links	Customer Mng. Location Product
	Previous Attempts	0 previous attempts
	Completion status	Handled
	Disposition Code	

Telephony Session

Already A Customer
Disconnected number
Successful conclusion
Wrong Number

Click here to select the relevant Disposition Code

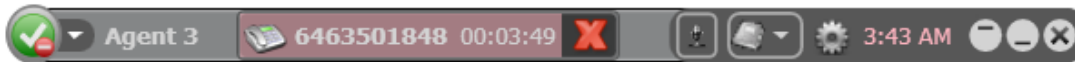


6463501848 00:03:11

✓	Type	Campaign Telephony
✗	State	Wrap Up
	Customer	John Doe
	Campaign	Test
	Entry Time	3:39 AM
	Origin	Agent 3
✗	Destination	6463501848
	Business Process	Sales
	Demands	Handle Progressive Dialer
	Waiting Time	00:00:00
	Remarks	0
	Links	Customer Mng. Location Product
	Previous Attempts	0 previous attempts
	Completion status	Handled
	Disposition Code	Handled

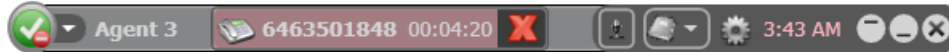
Telephony Session

Click here to select the relevant Completion Status

A main call details window titled '6463501848' with a duration of '00:03:49'. The window contains a list of fields with corresponding icons on the left: a green checkmark for 'Type' (Campaign Telephony), a red 'X' for 'State' (Wrap Up), a person icon for 'Customer' (John Doe), a person icon for 'Campaign' (Test), a person icon with a plus sign for 'Entry Time' (3:39 AM), a person icon for 'Origin' (Agent 3), a red 'X' for 'Destination' (6463501848), a person icon for 'Business Process' (Sales), a person icon for 'Demands' (Handle Progressive Dialer), a person icon for 'Waiting Time' (00:00:00), a person icon for 'Remarks' (0), and a person icon for 'Links'. Below the 'Remarks' field is a text area containing 'My Remark'. At the bottom, there is a blue 'Add Remark' button. The window also has a 'Telephony Sessions' tab at the bottom.

Click here to enter your Remarks

Click here to submit your new remark



6463501848		00:04:20
<input checked="" type="checkbox"/>	Type	Campaign Telephony
<input checked="" type="checkbox"/>	State	Wrap Up
<input type="checkbox"/>	Customer	John Doe
<input type="checkbox"/>	Campaign	Test
<input type="checkbox"/>	Entry Time	3:39 AM
<input type="checkbox"/>	Origin	Agent 3
<input checked="" type="checkbox"/>	Destination	6463501848
	Business Process	Sales
	Demands	Handle Progressive Dialer
	Waiting Time	00:00:00
	Remarks	0
	Links	Customer Mng. Location Product
	Previous Attempts	0 previous attempts
	Completion status	Callback Requested
	Destinations	1 destinations
	From:	11/30/2011
	Between:	12:00 AM
	and:	12:00 AM
	Cust. Time Zone	(GMT-08:00) Pacific TI

Telephony Sessions

Click to complete the interaction – **unless you need to schedule a call back, in this case view the instructions on the following page**

Generating a callback

(applicable when the customer asks to be contacted again)

A call details window for call ID 6463501848. The window has a title bar with the call ID and time '00:04:07'. The main area contains a list of call details with status icons on the left. The 'Completion status' field is set to 'Handled' and is open to a dropdown menu. The dropdown menu lists several options, with 'Callback Requested' highlighted in blue. A call log icon is visible on the right side of the window.

Type	Campaign Telephony
State	Wrap Up
Customer	John Doe
Campaign	Test
Entry Time	3:39 AM
Origin	Agent 3
Destination	6463501848
Business Process	Sales
Demands	Handle Progressive Dialer
Waiting Time	00:00:00
Remarks	0
Links	Customer Mng. Location Product
Previous Attempts	0 previous attempts
Completion status	Handled
Disposition Code	Handled Callback Requested Busy Tone No Answer Fax Tone Answering Machine Wrong Destination Unknown Error

Select Callback Request from the Completion status options

6463501848 00:04:43

Type	Campaign Telephony
State	Wrap Up
Customer	John Doe
Campaign	Test
Entry Time	3:39 AM
Origin	Agent 3
Destination	6463501848
Business Process	Sales
Demands	Handle Progressive Dialer
Waiting Time	00:00:00
Remarks	0
Links	Customer Mng. Location Product
Previous Attempts	0 previous attempts
Completion status	Callback Requested
Destinations	1 destinations
From:	11/30/2011
Between:	12:00 AM
and:	12:00 AM
Cust. Time Zone	(GMT-08:00) Pacific T

Telephony Sessions

Click to open the Calendar

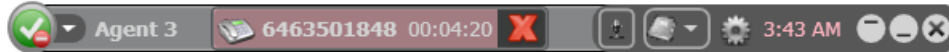
Select the date

December, 2011

Su	Mo	Tu	We	Th	Fr	Sa
			30	1	2	3
	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

A call details form titled '6463501848' with a duration of '00:05:02'. The form contains various fields with icons on the left: a green checkmark for 'Type' (Campaign Telephony), a red 'X' for 'State' (Wrap Up), a speech bubble for 'Customer' (John Doe), a group of people for 'Campaign' (Test), a clock for 'Entry Time' (3:39 AM), a person for 'Origin' (Agent 3), a red 'X' for 'Destination' (6463501848), a gear for 'Business Process' (Sales), a list for 'Demands' (Handle Progressive Dialer), a clock for 'Waiting Time' (00:00:00), a dropdown for 'Remarks' (0), a link icon for 'Links' (Customer Mng., Location, Product), a list icon for 'Previous Attempts' (0 previous attempts), a list icon for 'Completion status' (Callback Requested), a list icon for 'Destinations' (1 destinations), a calendar icon for 'From:' (12/1/2011), a dropdown for 'Between:' (12:00 AM), a dropdown for 'and:' (12:00 AM), and a dropdown for 'Cust. Time Zone'. A dropdown menu is open for the 'and:' field, showing a list of times from 12:00 AM to 3:00 AM. A call icon is in the top left of the form, and a 'Telephony' label is on the right side. A 'Telephony Session' label is at the bottom left.

Click to select
callback time

A vertical form titled '6463501848' with a '00:04:20' timer and a 'Telephony' label on the right. The form contains various fields with icons on the left: a green checkmark for 'Type' (Campaign Telephony), a red 'X' for 'State' (Wrap Up), a red 'X' for 'Customer' (John Doe), a red 'X' for 'Campaign' (Test), a red 'X' for 'Entry Time' (3:39 AM), a red 'X' for 'Origin' (Agent 3), a red 'X' for 'Destination' (6463501848), a red 'X' for 'Business Process' (Sales), a red 'X' for 'Demands' (Handle Progressive Dialer), a red 'X' for 'Waiting Time' (00:00:00), a red 'X' for 'Remarks' (0), a red 'X' for 'Links' (Customer Mng., Location, Product), a red 'X' for 'Previous Attempts' (0 previous attempts), a red 'X' for 'Completion status' (Callback Requested), a red 'X' for 'Destinations' (1 destinations), a red 'X' for 'From:' (11/30/2011), a red 'X' for 'Between:' (12:00 AM), a red 'X' for 'and:' (12:00 AM), and a red 'X' for 'Cust. Time Zone' ((GMT-08:00) Pacific TI). A 'Telephony Sessions' section is at the bottom.

✓	Type	Campaign Telephony
✗	State	Wrap Up
✗	Customer	John Doe
✗	Campaign	Test
✗	Entry Time	3:39 AM
✗	Origin	Agent 3
✗	Destination	6463501848
✗	Business Process	Sales
✗	Demands	Handle Progressive Dialer
✗	Waiting Time	00:00:00
✗	Remarks	0
✗	Links	Customer Mng. Location Product
✗	Previous Attempts	0 previous attempts
✗	Completion status	Callback Requested
✗	Destinations	1 destinations
✗	From:	11/30/2011
✗	Between:	12:00 AM
✗	and:	12:00 AM
✗	Cust. Time Zone	(GMT-08:00) Pacific TI

Click to complete the interaction and generate the new callback request

Thank you!

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