

**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: <a href="#">Customer Mng.</a> <a href="#">Location</a> <a href="#">Product</a>
<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

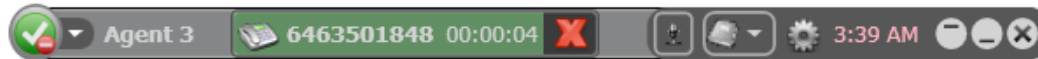
**Decline:** Click to decline the interaction and return it to the queue

Indicates that this is a campaign call

Customer name

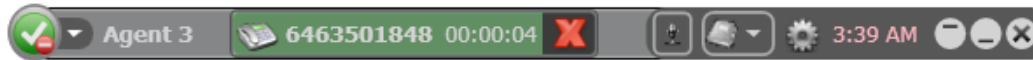
Customer dialed phone number

# Handling The Call



A call handling interface window for call ID 6463501848. The window has a title bar with the call ID and duration '00:00:04'. On the left is a vertical toolbar with icons for checkmark, red X, headset, people, plus, minus, red X, green arrow, and orange circle. The main area contains a list of fields: 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 these are sections for Previous Attempts, Completion status, and Disposition Code. At the bottom is a 'Telephony Sessions' section showing a session for call ID 6463501848 with a duration of 00:00:05 and status icons (green bars and red X).

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

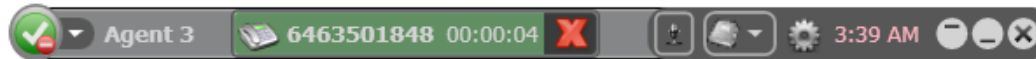


A vertical panel displaying call details. At the top, it shows a telephone icon, the call ID '6463501848', and the duration '00:00:04'. Below this is a list of fields with icons on the left and values in text boxes on the right. The fields are: Type (Campaign Telephony), State (Handling), Customer (John 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, there is a 'Telephony Sessions' section with a green bar showing the call ID '6463501848', a timer '00:00:05', and status icons.

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...

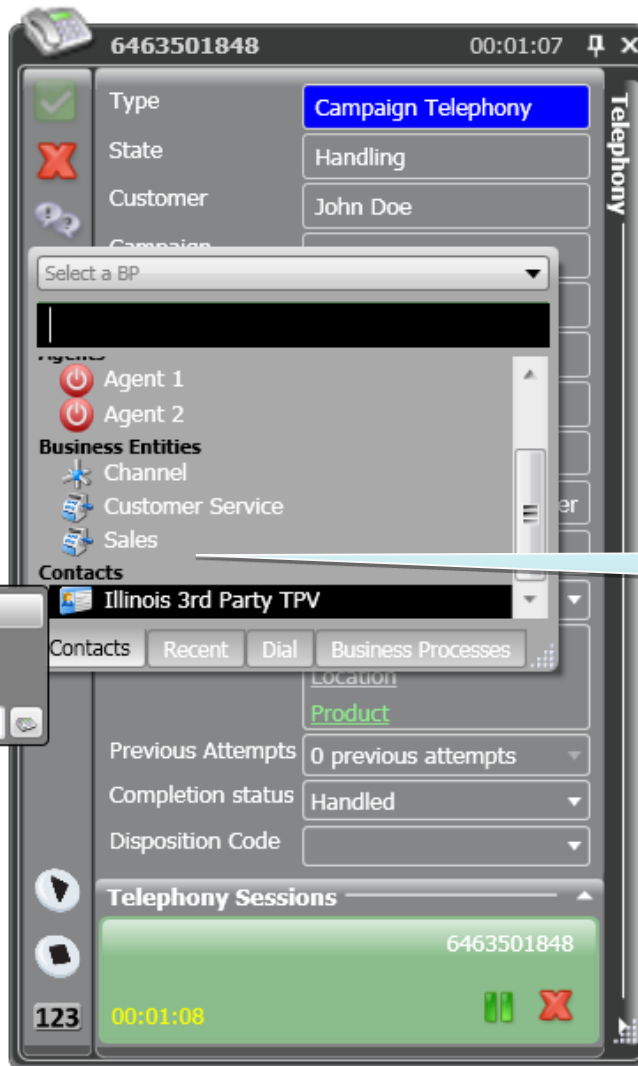
# Attended Transfer to a Third Party

A call details window titled '6463501848' with a timer '00:00:04'. The window has a vertical toolbar on the left with icons for checkmark, red X, headset, add person, remove person, red X, green arrow, and orange circle. The main area contains the following fields:

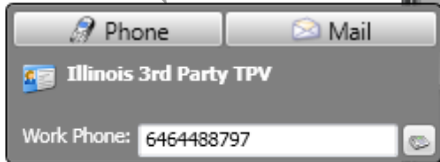
Type	Campaign Telephony
State	Handling
Customer	John Doe
Campaign	Test
Entry Time	3:39 AM
Origin	Agent 3
Destination	6463501848
Business Process	Sales
Demands	Handle Progressive Dialer
Waiting Time	00:00:00
Remarks	0
Links	Customer Mng. Location Product
Previous Attempts	0 previous attempts
Completion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

At the bottom, there is a 'Telephony Sessions' section with a green bar showing the call ID '6463501848', a timer '00:00:05', and a red 'X' icon.

**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	<a href="#">Customer Mng.</a> <a href="#">Location</a> <a href="#">Product</a>
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	▶

1

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
*	0 +	#

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	▶▶▶

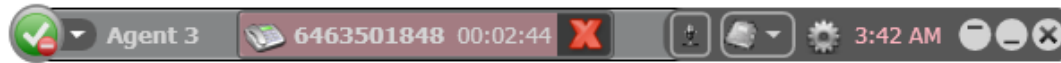
Click here to transfer the call to the person you are consulting with

# 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 red 'X' for 'Waiting Time' (00:00:00). There is a 'Remarks' dropdown (0), a 'Links' section with 'Customer Mng.', 'Location', and 'Product', a 'Previous Attempts' dropdown (0 previous attempts), a 'Completion status' dropdown (Handled), and a 'Disposition Code' dropdown. At the bottom, there is a 'Telephony Sessions' section with a green bar for call ID '6463501848', a timer '00:00:05', and a red 'X' icon. A '123' icon is also present.

Click here to complete the interaction

# Wrapping Up The Interaction

A window titled '6463501848' with a timer '00:02:44' and a close button. The window contains a list of call details. A red 'X' icon is next to the 'State' field, which is 'Wrap Up'. A light blue callout bubble points to this field.

✓	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	<a href="#">Customer Mng.</a> <a href="#">Location</a> <a href="#">Product</a>
	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

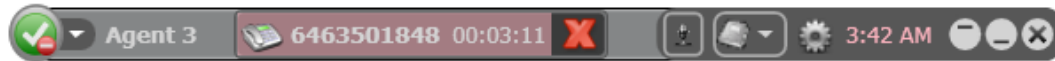
6463501848 00:03:01

✓	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



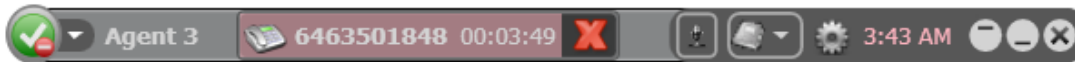
6463501848 00:03:11

✓	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	<a href="#">Customer Mng.</a> <a href="#">Location</a> <a href="#">Product</a>
	Previous Attempts	0 previous attempts
	Completion status	Handled
	Disposition Code	Handled

Telephony Session

- Handled
- Callback Requested
- Busy Tone
- No Answer
- Fax Tone
- Answering Machine
- Wrong Destination
- Unknown Error

Click here to select the relevant Completion Status



6463501848 00:03:49

✓	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	My Remark
	Previous Attempts	
	Completion status	
	Disposition Code	Add Remark

Telephony Sessions

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	<a href="#">Customer Mng.</a> <a href="#">Location</a> <a href="#">Product</a>
	Previous Attempts	0 previous attempts
	Completion status	Callback Requested
	Destinations	1 destinations
	From:	11/30/2011 30
	Between:	12:00 AM
	and:	12:00 AM
	Cust. Time Zone	(GMT-08:00) Pacific TI

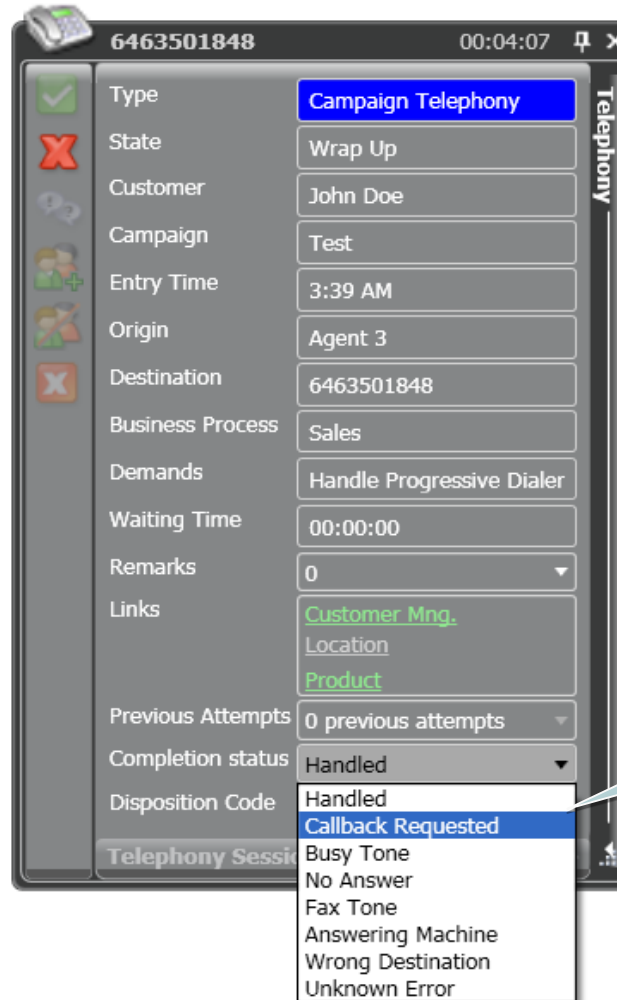
Telephony Sessions

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)



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

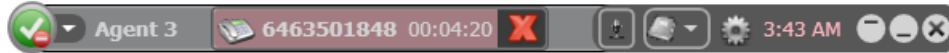
Select the date

December, 2011

Su	Mo	Tu	We	Th	Fr	Sa
			30	1	2	3
4	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 vertical form titled "6463501848" with a duration of "00:05:02". The form contains several 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 list for "Links" (Customer Mng., Location, Product), a dropdown for "Previous Attempts" (0 previous attempts), a dropdown for "Completion status" (Callback Requested), a dropdown for "Destinations" (1 destinations), a date field 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 "Telephony Session" button is at the bottom. A call log icon is in the top left corner of the form.

Click to select  
callback time



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
<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	<a href="#">Customer Mng.</a> <a href="#">Location</a> <a href="#">Product</a>
<input type="checkbox"/>	Previous Attempts	0 previous attempts
<input type="checkbox"/>	Completion status	Callback Requested
<input type="checkbox"/>	Destinations	1 destinations
<input type="checkbox"/>	From:	11/30/2011 30
<input type="checkbox"/>	Between:	12:00 AM
<input type="checkbox"/>	and:	12:00 AM
<input type="checkbox"/>	Cust. Time Zone	(GMT-08:00) Pacific TI

Telephony Sessions

Click to complete the interaction and generate the new callback request

Thank you!

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CONTACT

