EVOLVE CONTACT

How to Make Outbound Calls
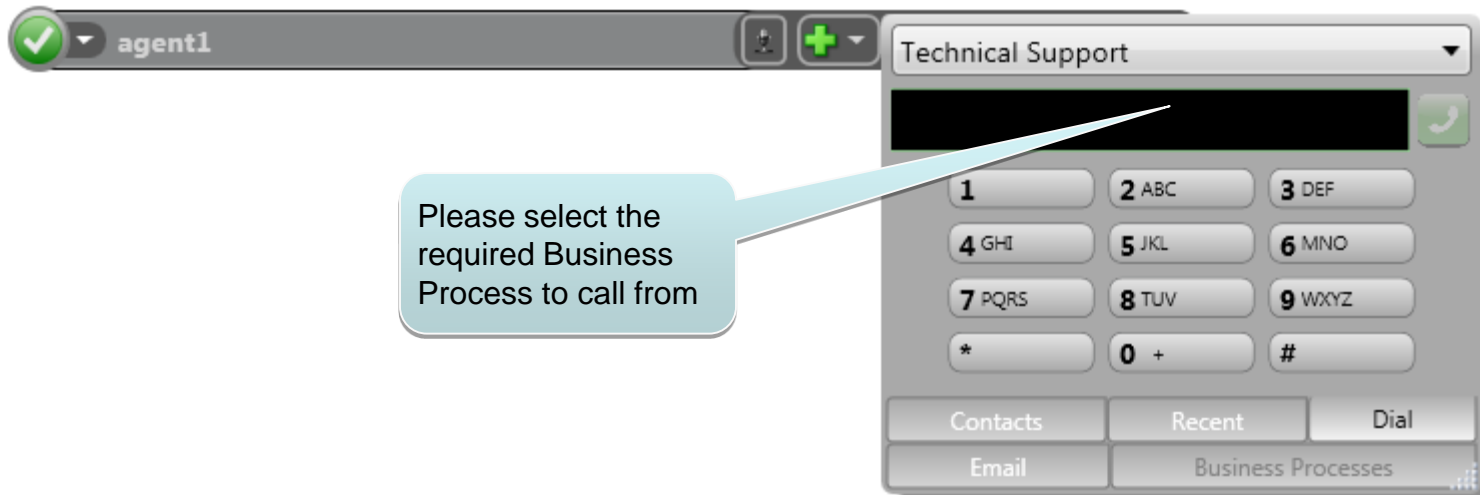
EVOLVE IP

Create a new interaction:

1. To initiate a new interaction click on [+▼] icon

Click here to initiate any type of interaction (voice, email)

2. The dialing pad menu will show up:

Please select the required Business Process to call from

Place the call using the dial pad:

1. To place a call using the dial pad select the Dial tab.
2. Enter a phone number by using one of three options:
   - The dial pad
   - Typing on the PC keyboard
   - Copy and paste the number from any external source into the number display
3. Click the icon to place the call

Dial tab: enables entering a phone number to dial

Placing the call via the phone book:

1. To place a call using the phone book select the contacts tab.
2. Scroll down the list of contacts and find the person whom you want to contact.
3. Mouse over the contact name, and click on the [Phone] icon in the action panel to place the call.
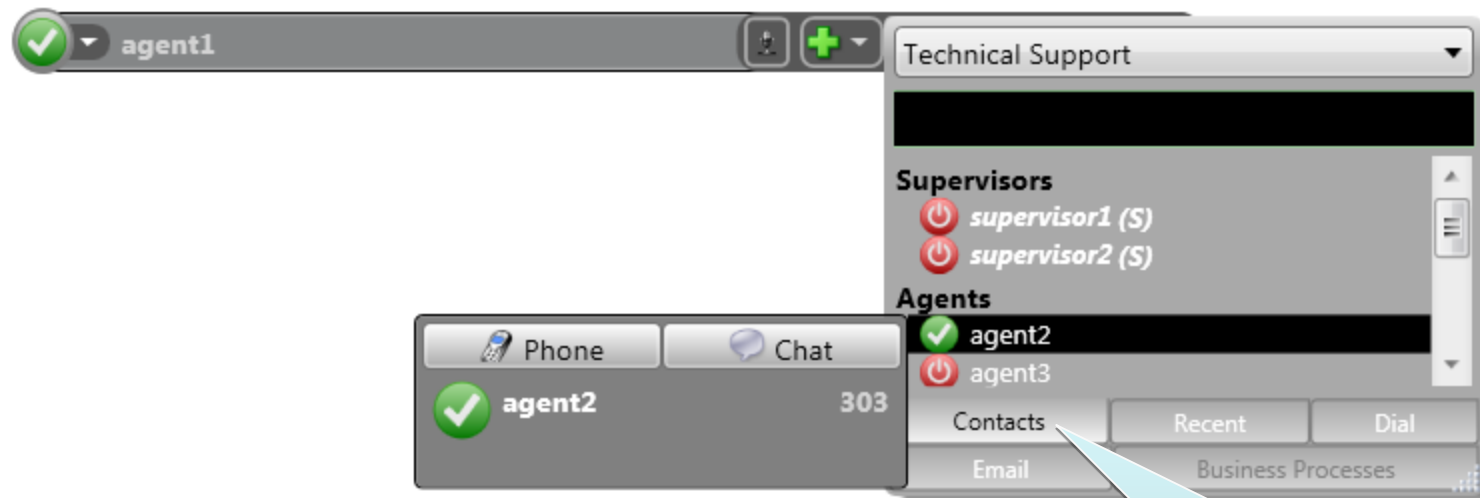

Contacts tab: enables calling contacts from your phone book

The 'Recent' tab:

This tab allows you to interact with contacts you have previously communicated with, including incoming and outgoing interactions.
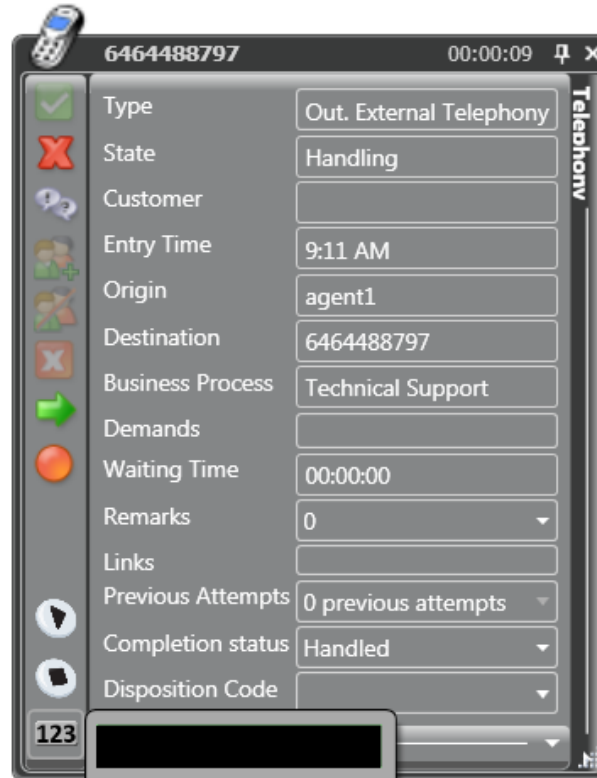To use the recent tab to place a call:

1. Select the 'Recent' tab
2. Mouse over the relevant contact name, and click on the [Phone] icon in the action panel to place the call.
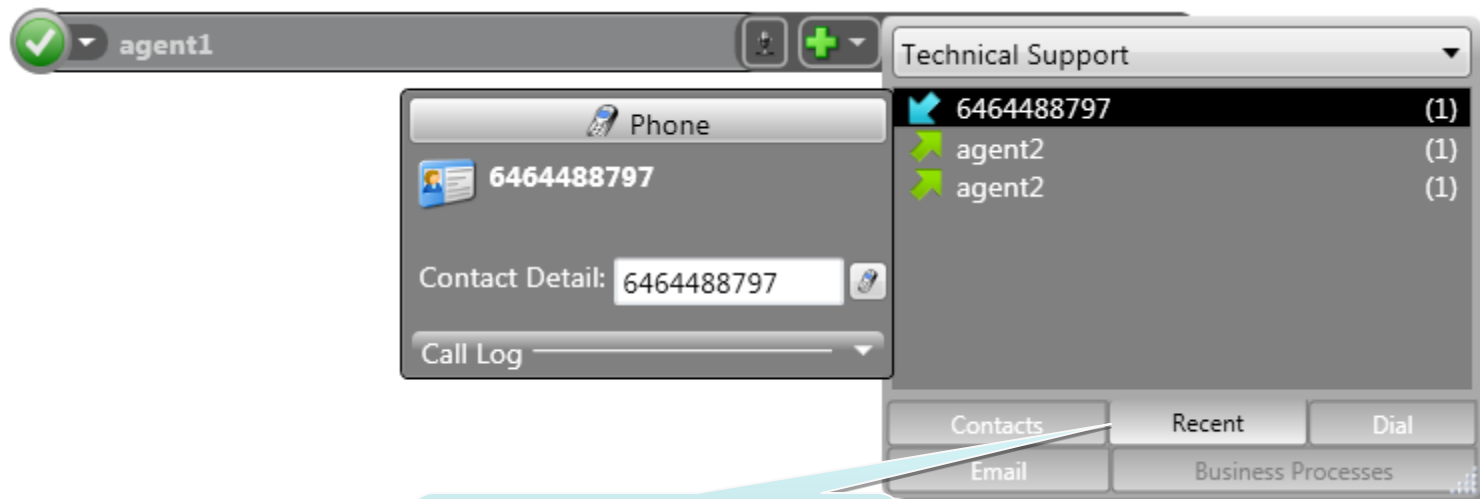
Recent tab: Allows you to interact with contacts you have recently communicated with

The call dial pad:

Click on the 123 icon if during a call you are prompted for key selection (DTMF)

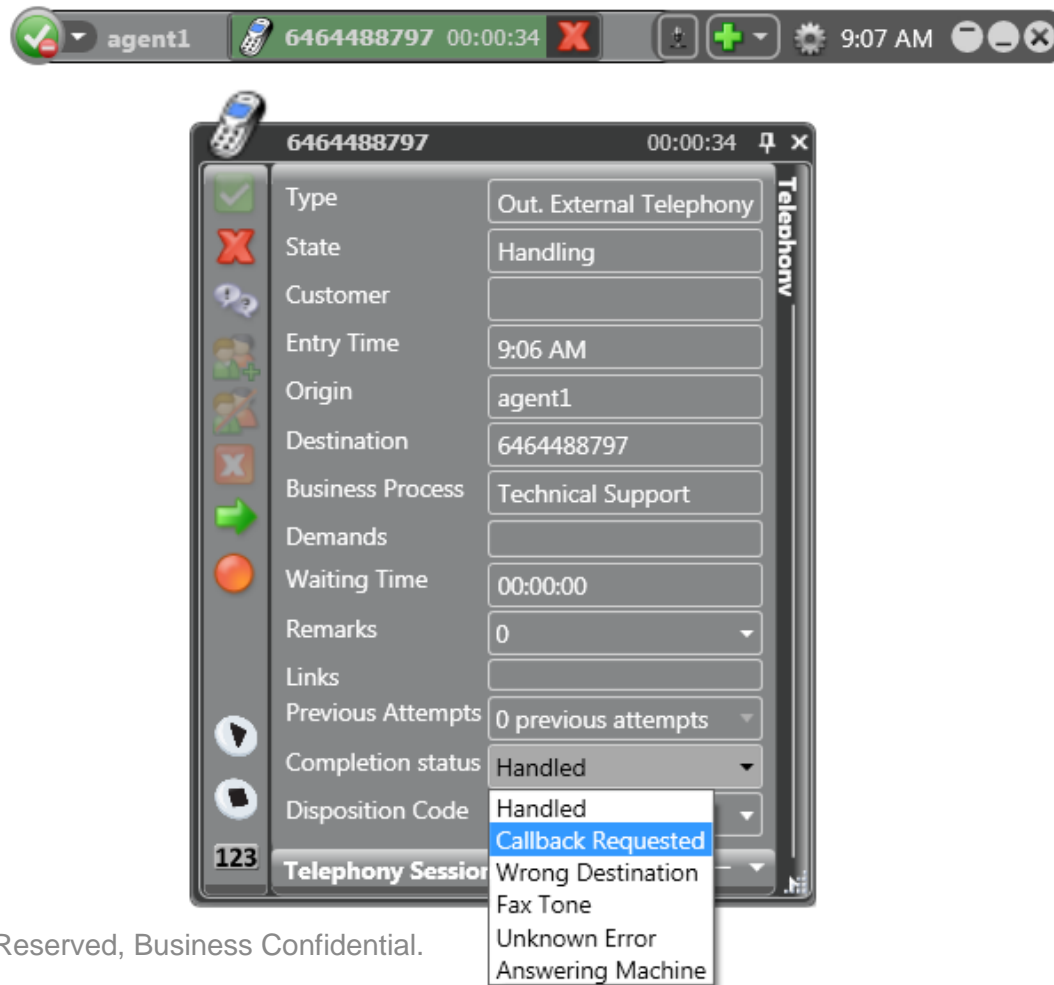Click on the keypad number/s that you wish to select. PC Keyboard can be used as well.

Click to Call:

When Click to Call option is set, each phone number you copy (Ctrl-C) will be automatically pasted into the dial pad, and displayed on its screen. This allows you to call that number right away.
To set this option, go to settings ⚙ and select "Click to call" option:
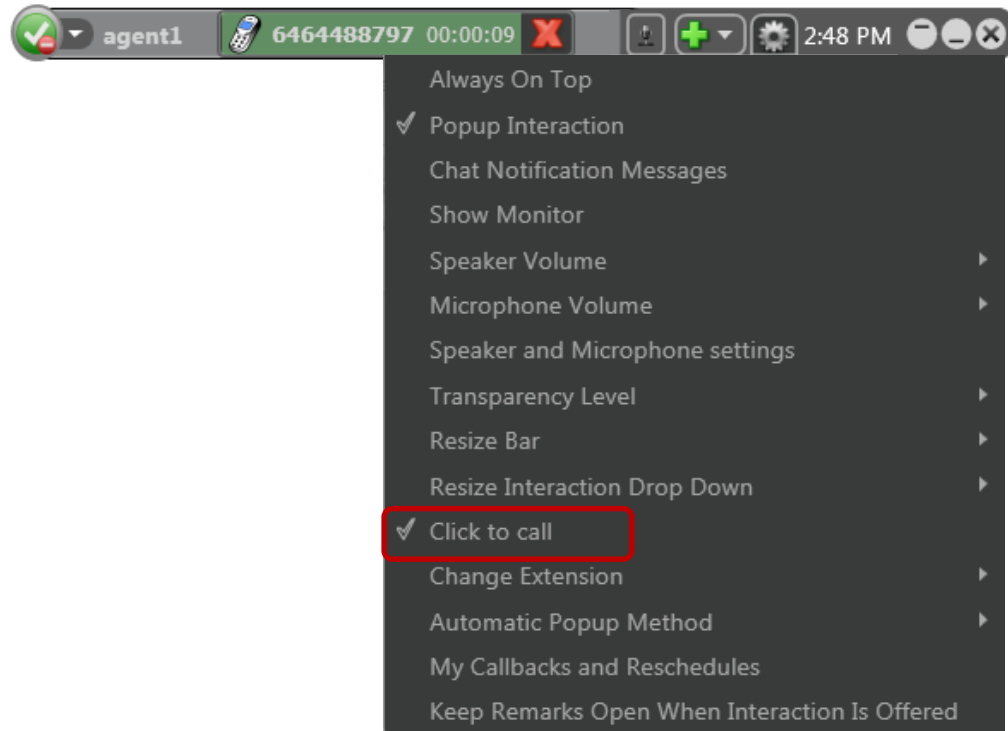
Callback request:

If during the call a customer requests to be contacted later you can select "Callback Requested" state from the Completion Status options to schedule an automatic callback interaction:
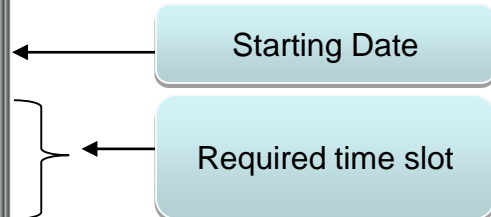
Specify Callback's requested Date and Time:

Routing Type:
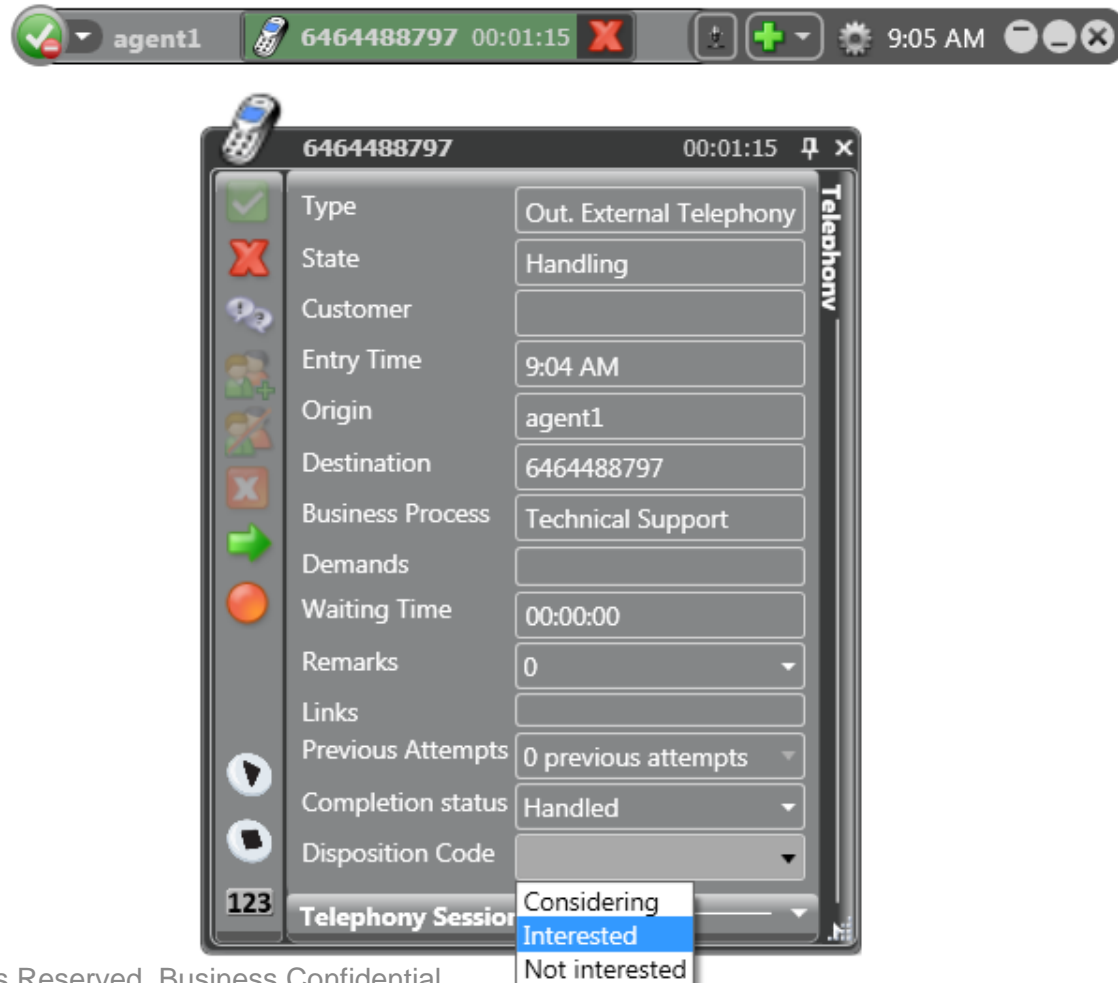Select Agent or Team to assign the callback

Starting Date

Required time slot

Disposition codes:

For each call made, you can enter a disposition code reflecting the ending business status of this call.

The disposition codes, for each call will appear in the supervisor reports.

Thank you!

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