



Campaign Creation

uContact net2phone | Training.



General vision.

Goal:

Understand and implement campaigns effectively.

Requirements:

Permission to access administrator tools in uContact.



What is a campaign?

Campaigns are call queues which can be accessed with a specific number (DID) or with a specific menu (IVR) option. Agents are assigned to the campaigns so if a call comes in agents will answer them.

You monitor the campaigns' performance in real time where you can see main KPI's in order to supervise and then improve the contact center's metrics.

There are 2 types of campaigns:

Inbound: for incoming calls in the contact center

Outbound: for outgoing calls of the contact center

Campaign creation



Access the left lateral menu and go to the Administrator section / Campaigns / Voice

The screenshot displays the ucontact administrator interface. On the left is a dark teal lateral menu with the following items: Users, Campaigns, Voice, Webchat, Heynow, SMS, Email, Social Networks, Holidays, Blacklist, Dispositions, Providers, Audios, Dialers, and Reports. The 'Campaigns' item is expanded, and 'Voice' is selected. The main dashboard area features a top navigation bar with the ucontact logo and a 'Portal' button. Below this, there are four performance cards: 'Agents' (74 total, 8 logged, 10%), 'Calls' (0), 'Facebook' (0), and 'Twitter' (0). Each card shows 'Inbound / Outbound %'. At the bottom, a line graph shows data points over time, with a peak at 4.

Panel of creation of inbound campaigns (radiobutton selected in Inbound)

The screenshot displays the ucontact administrator interface. On the left is a navigation sidebar with categories like Users, Campaigns, Voice, Webchat, Heynow, SMS, Email, Social Networks, Holidays, Blacklist, Dispositions, Providers, Audios, Dialers, Reports, Quality, Earlang, and System. The main area is titled 'Campaigns' and has tabs for 'Campaigns' and 'Members'. Under the 'Campaigns' tab, there are radio buttons for 'Inbound' (selected) and 'Outbound'. The 'Inbound' panel contains several input fields: Name (Round Seconds), Email, DID (default), and a grid for quality metrics (15, 3, 0, 100, 15, 0, 0, 0). There are also dropdown menus for Strategy (Welcome), After Hours (After Hours), Form, and Context (Empty). A 'Schedules' section shows a weekly calendar with 'From' and 'To' fields. On the right side of the interface, there is a search bar and a table of existing campaigns.

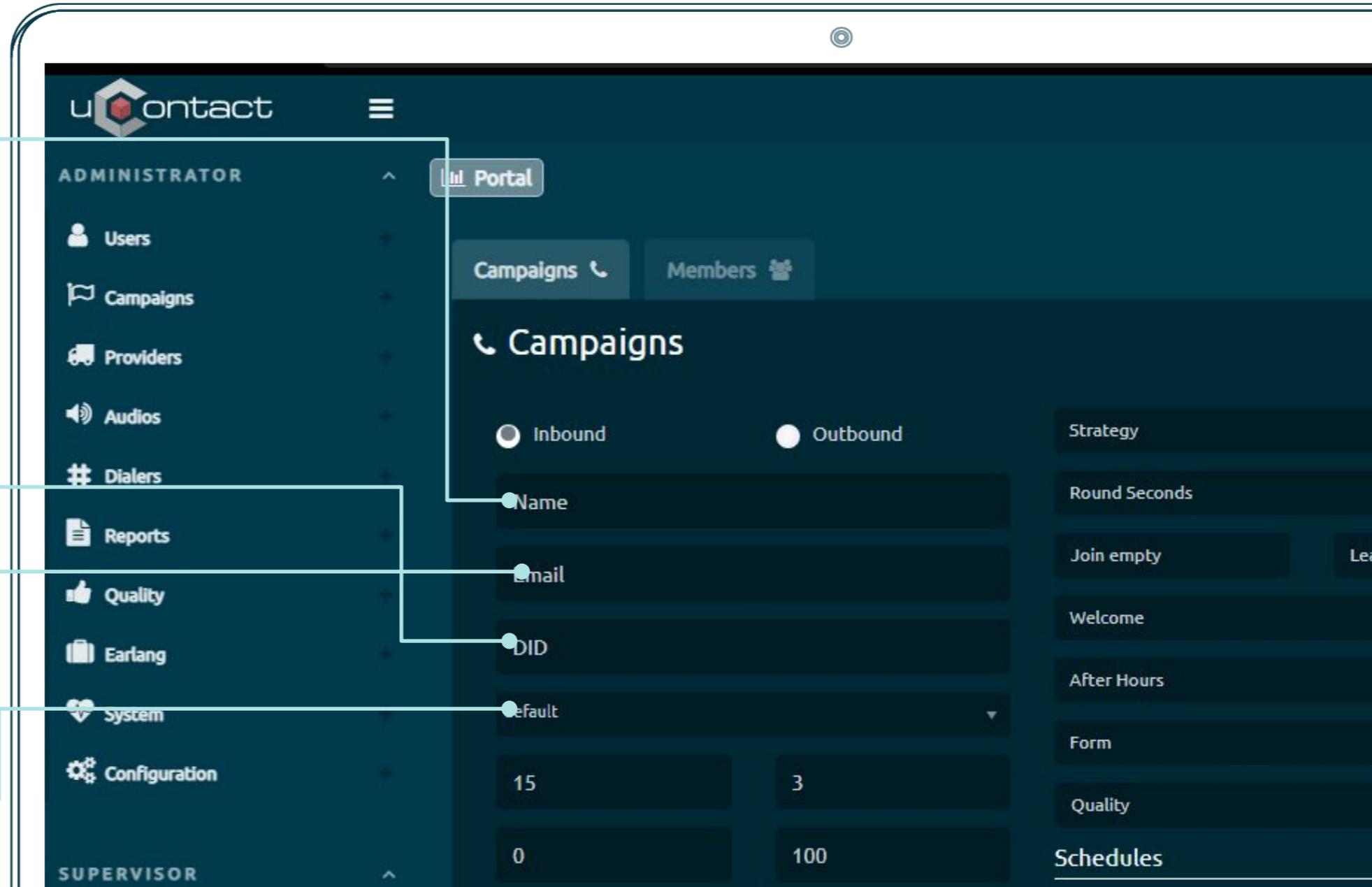
NAME	STRATEGY	FORM	DID	TYPE
BO_LU_Out_Linear_Verification->	linear	CRM true	2809174	🚩
BO_LU_Out_randomRiskMatrix->	linear	Loan_Issuance_Survey	2809132	🚩
BO_QA_In_Ringall_Compliants<-	ringall	CRMVergent	2802272	🚩
BO_QA_Out_Linear_Comp->	linear	CRM true	2809172	🚩
Col_BCSA_In_ringall_Inb<-	ringall	CRM true	2230865	🚩
Col_BCSA_Out_linear_Man->	linear	CRM true	100	🚩
Col_BCSA_Out_Linear_Man_Unlist->	leastrecent		2809143	#
Col_BCSA_Out_Prog_Appt->	leastrecent		2809143	#
Col_BCSA_Out_Prog_Com->	leastrecent		2809150	#
Col_BCSA_Out_Prog_Def->	leastrecent		2809143	#

Campaign name

Number which references the campaign (number to call from outside to access the campaign queue). In case of having multiple numbers that arrive to the same campaign the DIDs are separated with "&" (eg. number1 & number2&number3&etc.).

Email for sending voicemail recordings

Waiting music to be played (see appendix)



Creating campaigns - Inbound

Campaign creation

Strategy used to distribute the calls to the agents assigned of the campaign (random, all, etc).

Enter if queue is empty (yes by default)

Welcome and out of office audios reproduced by the system

Form or URL to show as a pop up once the call is connected. If it is a website, you only need to insert the URL in to the field (see appendix).

Select the quality model for campaign's recordings (see appendix)

Exit if queue is empty (no by default)

Strategy

Round Seconds

Join empty

Leave when empty

Welcome

After Hours

Form

Quality

Schedules

Sunday Monday Tuesday

Wednesday Thursday Friday

Saturday

From To

The time slots in which we want the campaign to be available are selected. If an out of hours call comes in, the corresponding audio is played and it is derived to the voice mailbox if it is enabled.

Enable call recording in the system (enabled by default)

Satisfaction survey at the end of the call.

Enable dispositions

The screenshot displays the configuration page for an inbound campaign in Microsoft Dynamics 365. The page is titled 'Campaigns' and shows the following settings:

- Campaign Type:** Inbound (selected)
- Ringall:** ringall
- BO_QA_In_Ringall_Compliants<:** 0
- Email:** 2802272
- Welcome:** Welcome
- After Hours:** After Hours
- CRMVergent:** CRMVergent
- Quality:** Quality
- Schedules:** Record (checked)
- Properties:** Record (checked), Report hold time, Timeout Restart, Ring in use, Announce position, Announce hold, Virtual hold
- Thresholds:** 40-80, 20-30, 60-180-300, 6-3
- Break's Thresholds:** 40-80, 20-30, 60-180-300, 6-3
- Voicemail:** (empty)
- Autoanswer:** (empty)

Creating campaigns - Inbound (Final result)

The screenshot displays the ucontact interface for creating an inbound campaign. The left sidebar contains navigation icons. The main area is divided into configuration panels for Name, Email, DID, and various thresholds. A right-side panel shows a list of created campaigns with columns for NAME, STRATEGY, FORM, DID, and TYPE.

NAME	STRATEGY	FORM	DID	TYPE
BO_LU_Out_Linear_Verification->	linear	CRM true	2809174	🚫
BO_LU_Out_randomRiskMatrix->	linear	Loan_Issuance_Survey	2809132	🚫
BO_Out_Cust_FeedbackLoop->	linear	CRM true	2809174	🚫
BO_QA_In_Ringall_Compliants<-	ringall	CRM Vergent	2802272	🚫
BO_QA_Out_Linear_Comp->	linear	CRM true	2809172	🚫
Col_BCSA_In_ringall_Inb<-	ringall	CRM true	2230865	🚫
Col_BCSA_Out_linear_Man->	linear	CRM true	100	🚫
Col_BCSA_Out_Linear_Man_Unlist->	leastrecent		2809143	#
Col_BCSA_Out_Prog_Appt->	leastrecent		2809143	#
Col_BCSA_Out_Prog_Com->	leastrecent		2809150	#

Once the campaign is created, it is shown in the right side panel

Creating campaigns - Inbound (Final result)

Campaign editing mode, the fields are filled with the data of the same campaign and you are allowed to make modifications.

In the box you will also see the other campaigns of the system (if any). By clicking on it, you will be allowed to edit it.

The screenshot displays the ucontact interface in campaign editing mode. The left sidebar contains navigation icons and a 'Portal' button. The main area is divided into two sections: a form for editing the current campaign and a list of other campaigns.

Campaign Editing Form:

- Strategy:** Round Seconds
- Join empty:** Leave when empty
- Welcome:** After Hours
- Form:** Quality
- Schedules:** Record (checked), Report hold time, Timeout Restart, Ring in use
- Properties:** Announce time, Announce position, Announce hold, Virtual hold
- Threshholds:** 40-80, 20-50, 60-180-300, 6-3

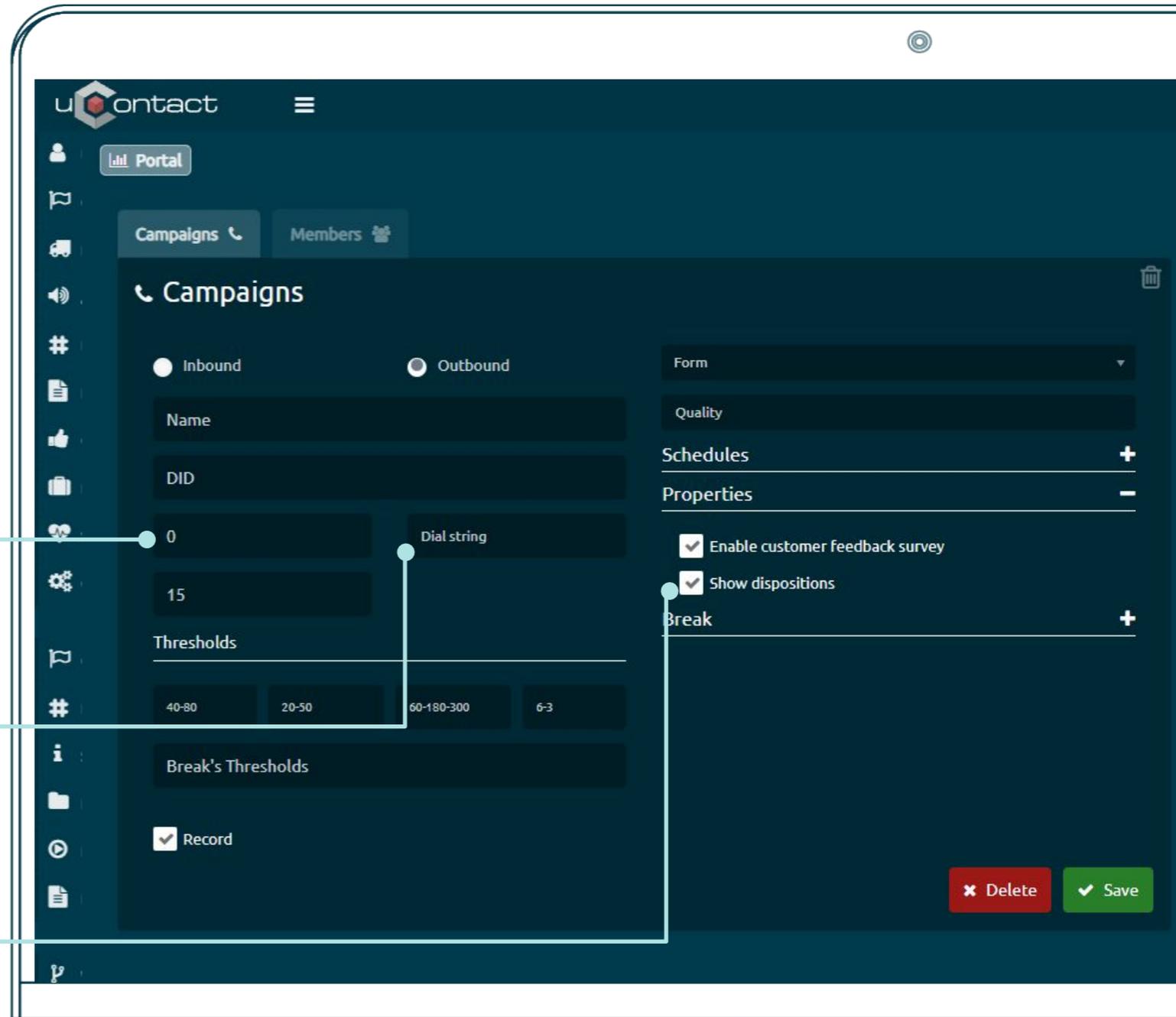
Campaign List:

NAME	STRATEGY	FORM	DID	TYPE
BO_LU_Out_Linear_Verification->	linear	CRM true	2809174	🚩
BO_LU_Out_randomRiskMatrix->	linear	Loan_Issuance_Survey	2809132	🚩
BO_Out_Cust_FeedbackLoop->	linear	CRM true	2809174	🚩
BO_QA_In_Ringall_Compliants<-	ringall	CRMVergent	2802272	🚩
BO_QA_Out_Linear_Comp->	linear	CRM true	2809172	🚩
Col_BCSA_In_ringall_Inb<-	ringall	CRM true	2230865	🚩
Col_BCSA_Out_linear_Man->	linear	CRM true	100	🚩
Col_BCSA_Out_Linear_Man_Unlist->	leastrecent		2809143	#
Col_BCSA_Out_Prog_Appt->	leastrecent		2809143	#
Col_BCSA_Out_Prog_Com->	leastrecent		2809150	#

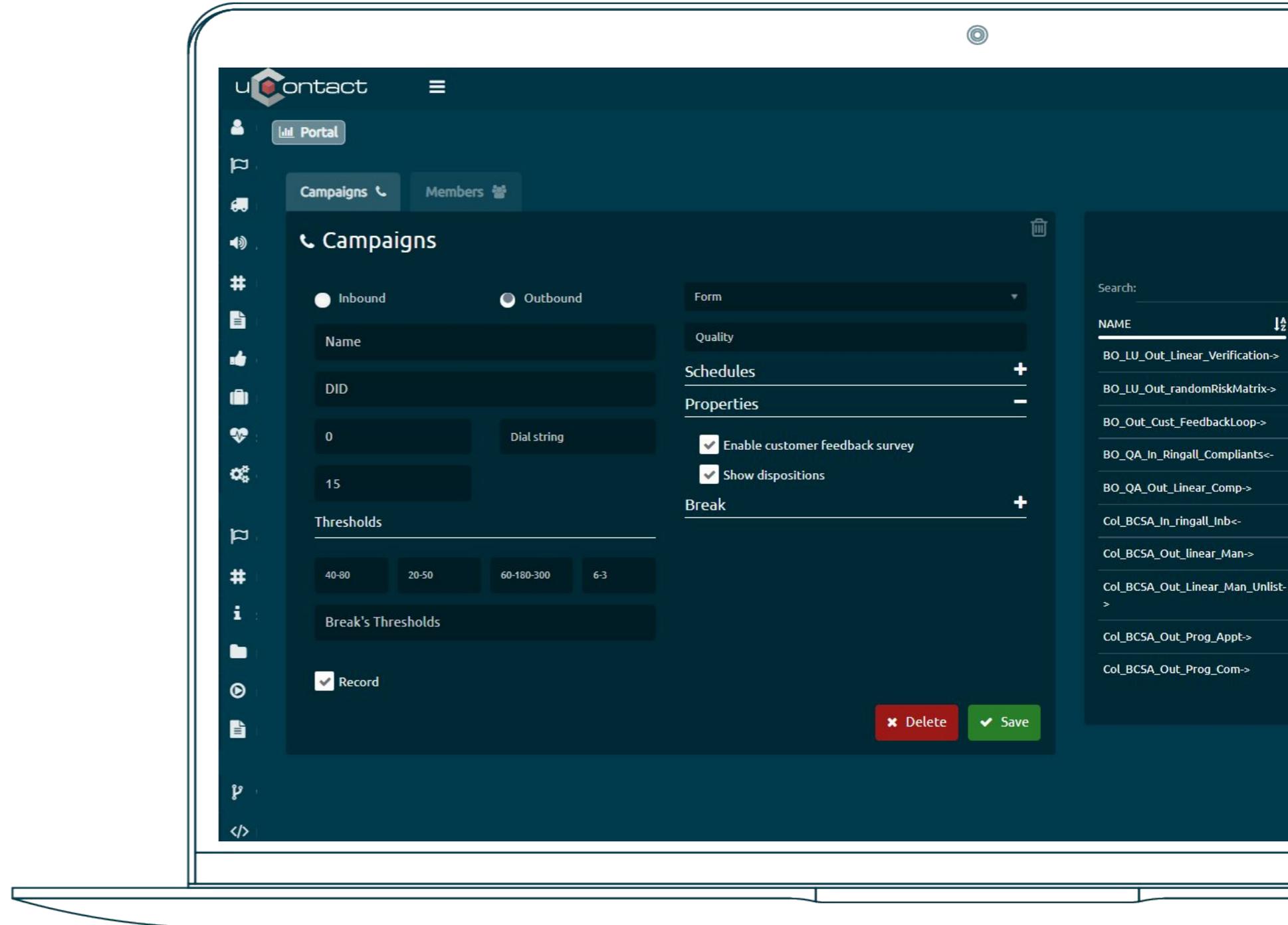
Number the client will see when receiving a call. This is limited to the type of provider used by the client as the provider defines what number is displayed.

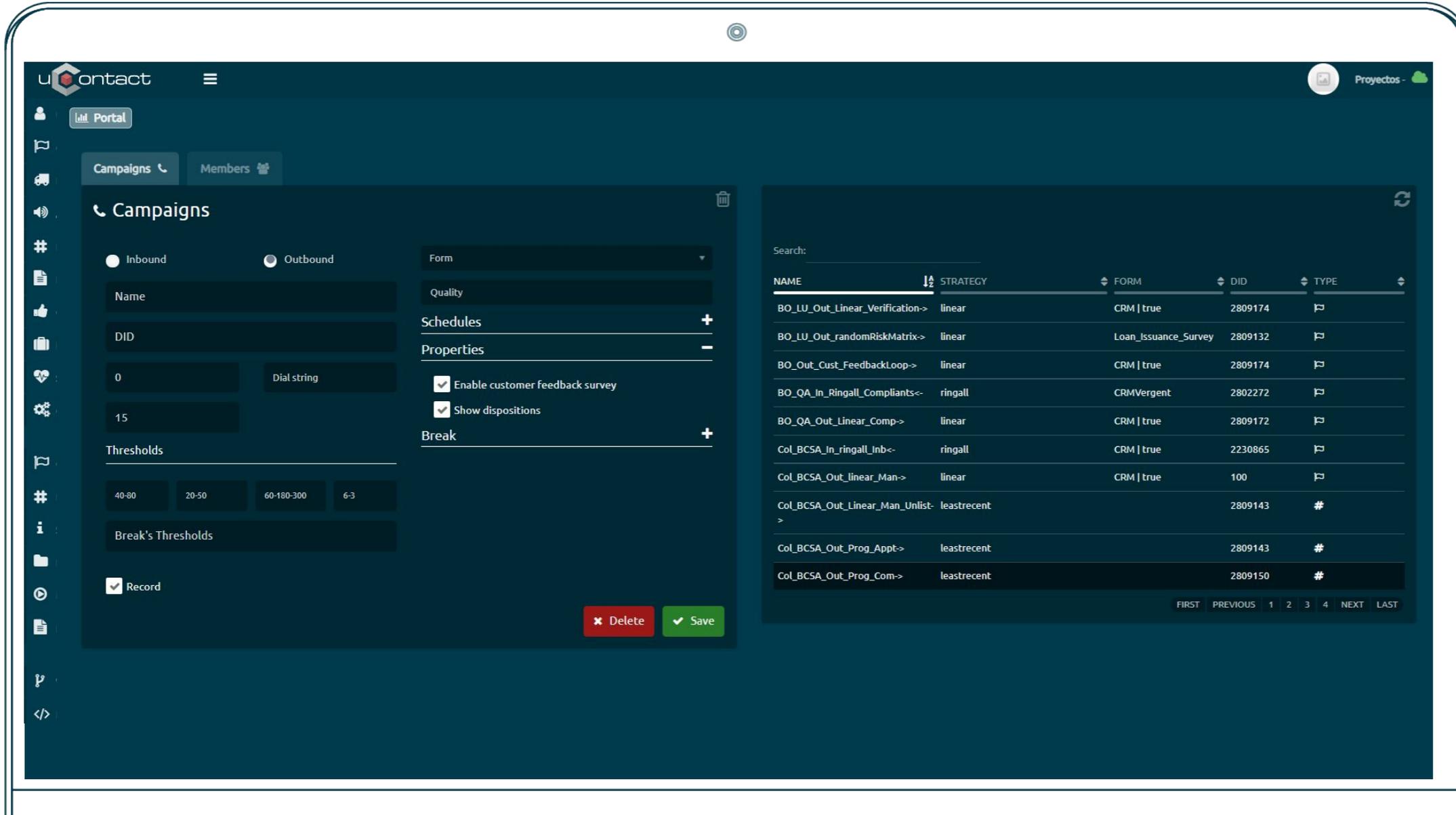
The provider to be used is determined, to specify it, it is necessary to know the name and the way to enter it is: SIP / providername (see appendix).

It works in the same way explained in the inbound campaigns.



Example of campaign creation with complete fields.





Once the outbound campaign is created, it appears as an additional item in the right side box.

When selected, edit mode is entered and the parameters of the same are loaded in the left side box.

Creating campaigns - Assigning agents to campaigns

All available campaigns

If a campaign is selected, all members assigned to it will appear here. If the campaign has no assigned members, the box will be empty.

All available agents

The screenshot displays the 'ucontact' interface with three main panels:

- Campaigns Panel:** Located on the left, it features a search bar and a list of campaigns. The list includes items like 'BO_LU_Out_Linear_Verification->', 'BO_LU_Out_randomRiskMatrix->', and 'BO_Out_Cust_FeedbackLoop->'. A teal line connects the 'All available campaigns' text to this panel.
- Members of Panel:** Located in the center, it is titled 'Members of' and contains a dropdown menu for selecting a campaign. Below it is a search bar and a table with a 'NAME' header. A teal line connects the explanatory text to this panel.
- Agents Panel:** Located on the right, it is titled 'Agents' and contains a dropdown menu for selecting a campaign, a search bar, and a list of agent names such as 'aamo', 'abowen', 'acooch', 'Admin', 'afrancis', 'atorres', 'bomoguel', 'callen', 'cdiaz', and 'CFlowers'. A teal line connects the 'All available agents' text to this panel.

Navigation elements include a 'Portal' button, 'Campaigns' and 'Members' tabs, and a 'Proyectos' user profile in the top right corner.

Select the campaign/s you want to modify, then select the agent/s you want to assigned to that campaign. Then, you press the green button <<ADD

The screenshot displays the ucontact web application interface. On the left is a navigation sidebar with icons for various functions. The main content area is divided into three panels:

- Campaigns Panel:** Contains a search bar and a list of campaigns. The selected campaign is "Col_BCSA_Out_linear_Man->".
- Members Panel:** Titled "Members of Col_BCSA_Out_linear_Man-> 9 Members". It includes a search bar and a list of agents with their names and profile icons. A dropdown menu is set to "Campaigns".
- Agents Panel:** Titled "Agents" with the subtitle "Selecting agents that belongs to an specific campaign". It features a search bar, a dropdown menu for "Campaigns", and a list of agents. A red box highlights the search and dropdown area.

Control buttons are located between the panels: a green "<< Add" button, a grey "Search" button, and a red ">> Remove" button. A teal line with circular endpoints connects the text above to the "Add" button and the Agents panel.

IMPORTANT

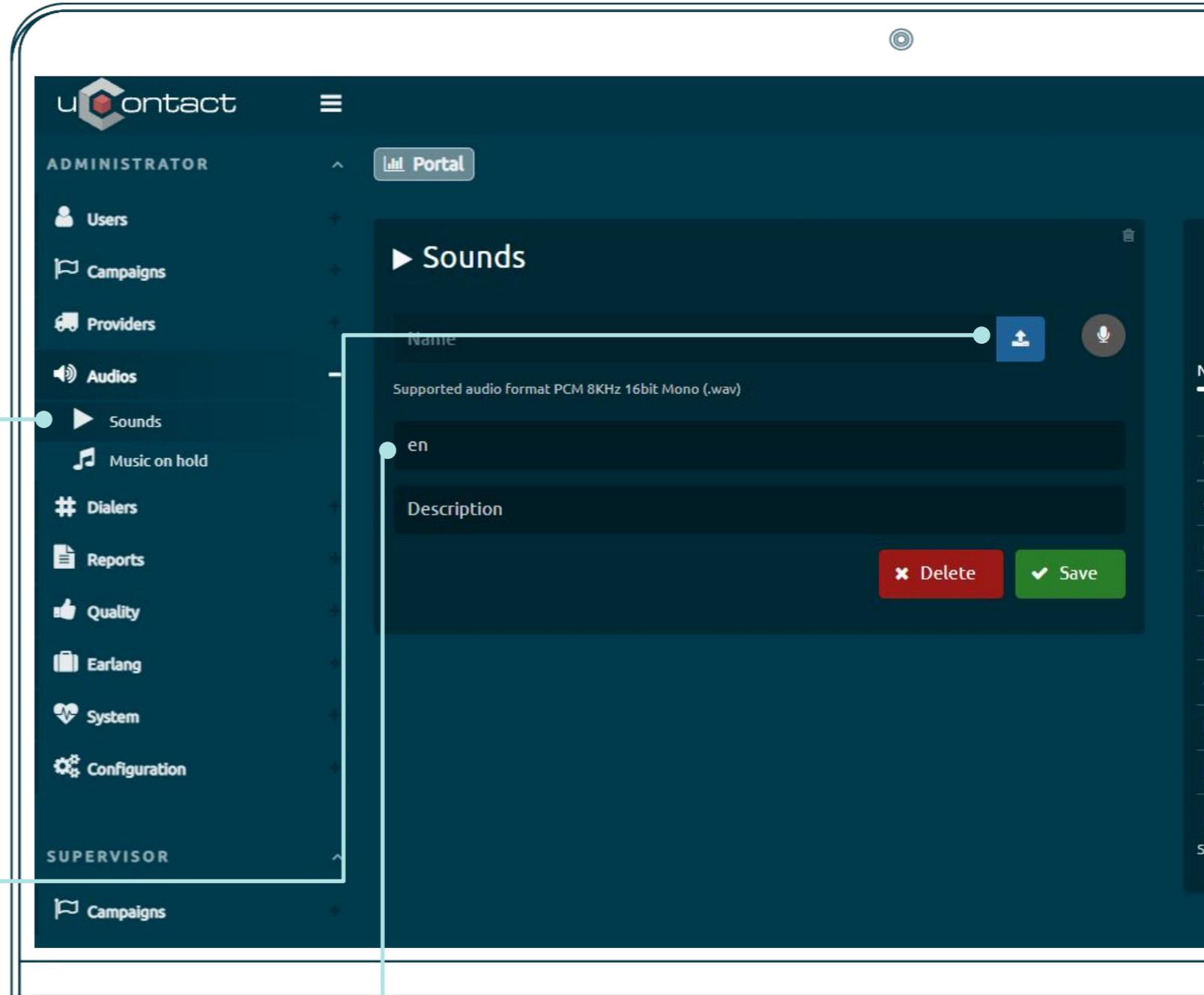
All the audios need to be uploaded in the specific format required. Otherwise, the system will not be able to play them.

Format: PCM 8KHz 16bit Mono (.wav)

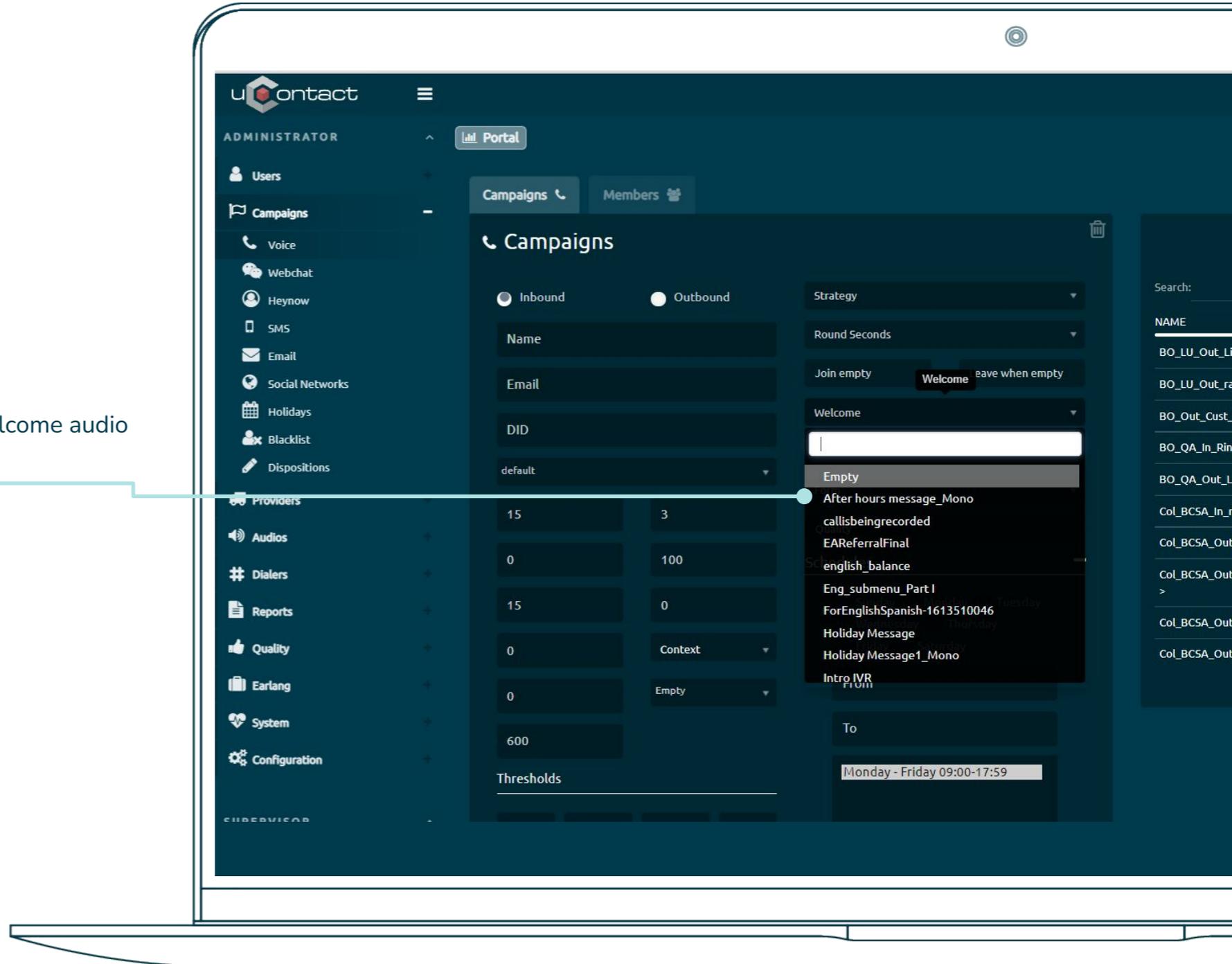
Administrator -> Audios -> Sounds

Once you press the upload button a window will open in which you will select the file that you want to upload from your computer.

Language (by default)

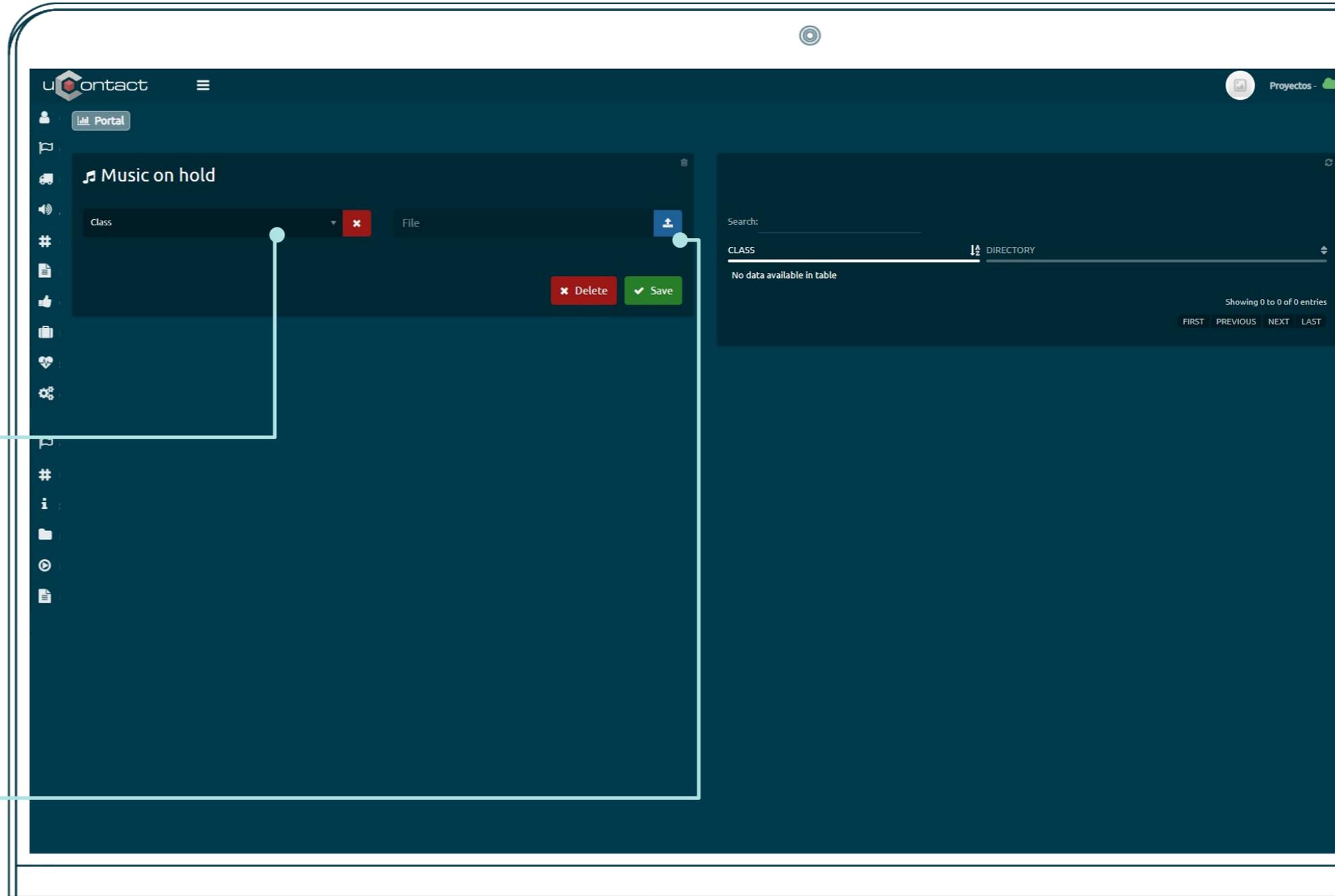


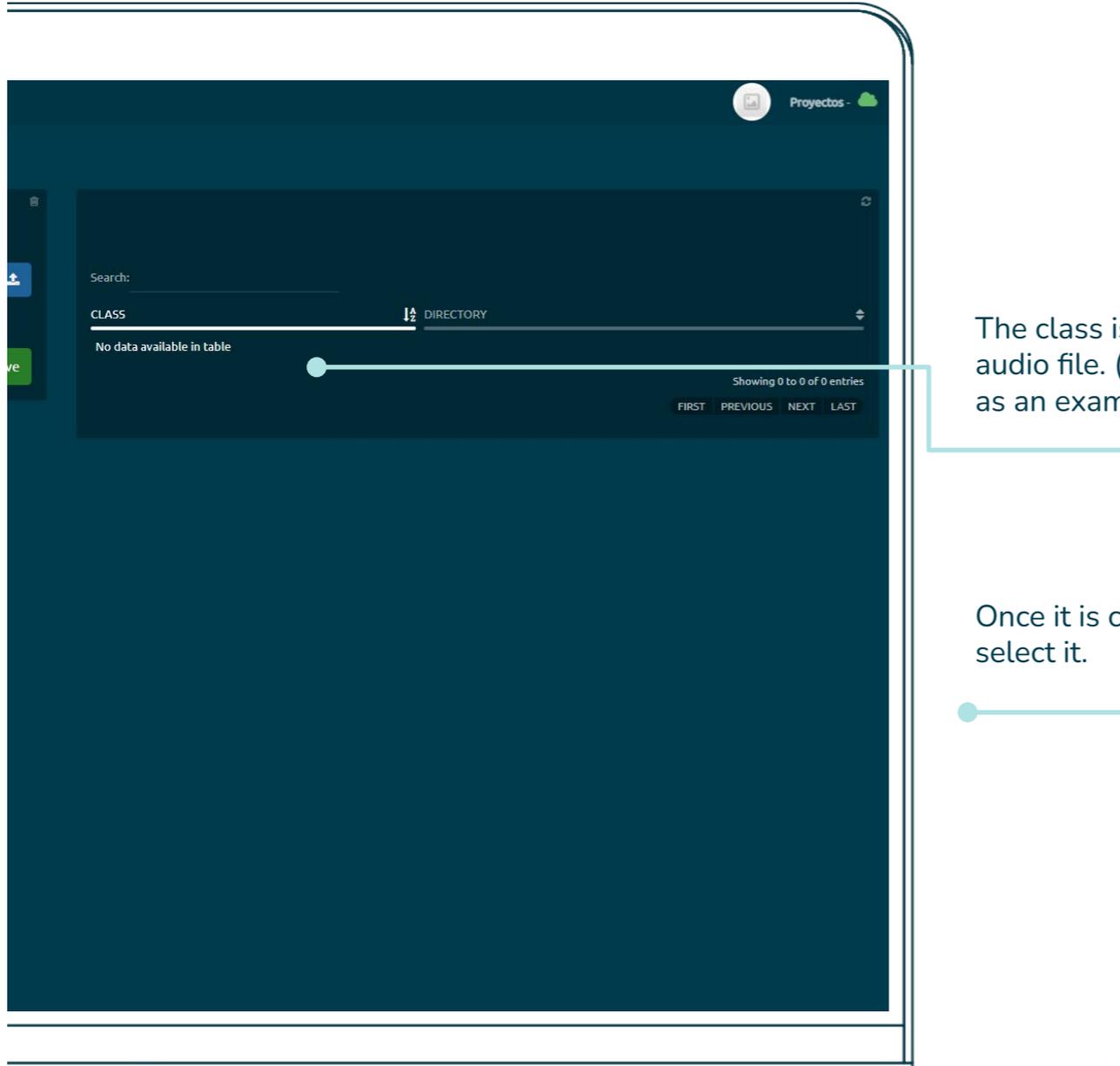
The audio will appear available to add it as Welcome audio or after hour.



Waiting music is divided by classes and the system randomly selects one of them within a specific class.

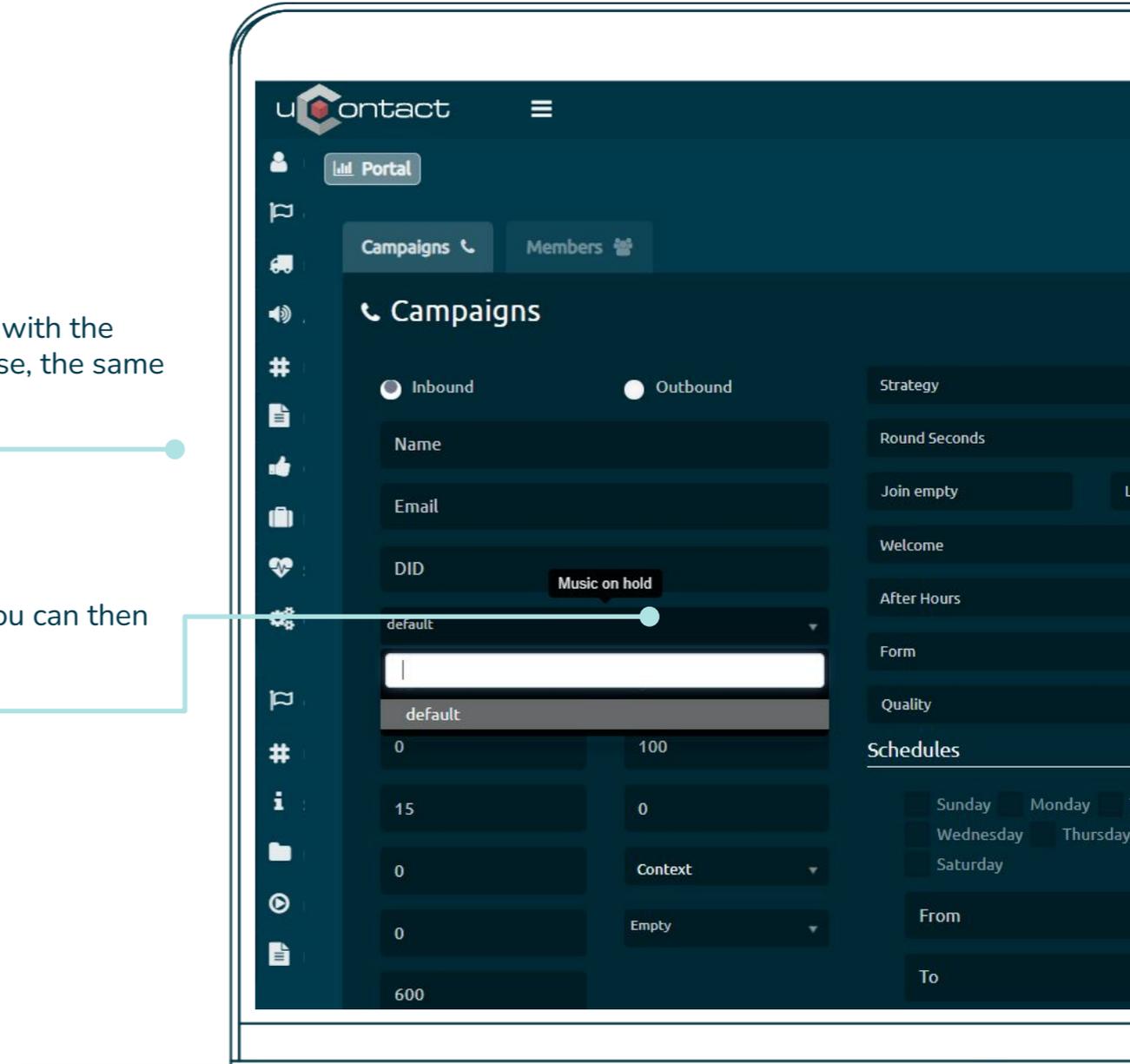
You can upload audio files to the system (with the same format mentioned above).





The class is created with the audio file. (in this case, the same as an example)

Once it is created, you can then select it.



Music on hold

Appendix.

Enter in empty queue:

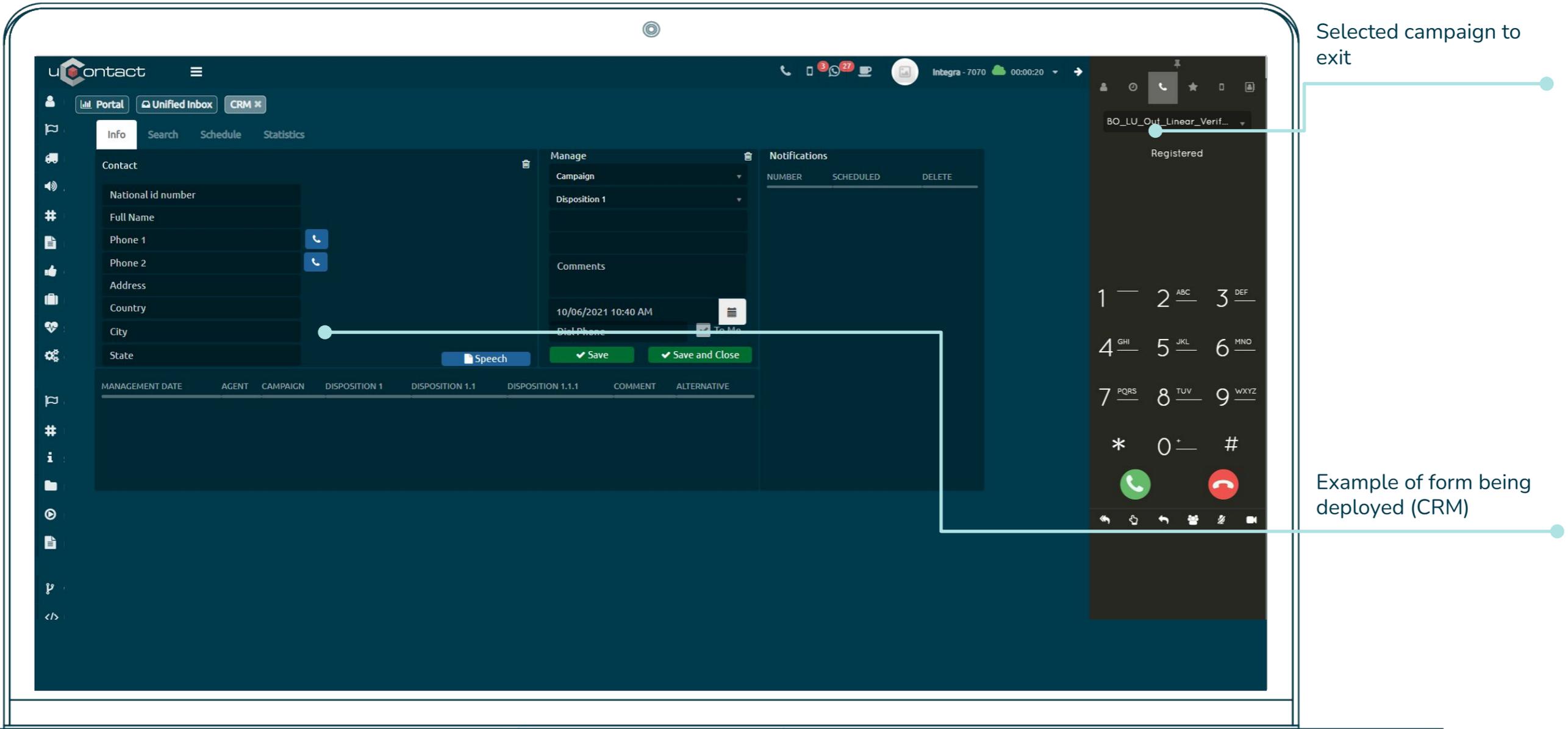
Separated by commas the following status:

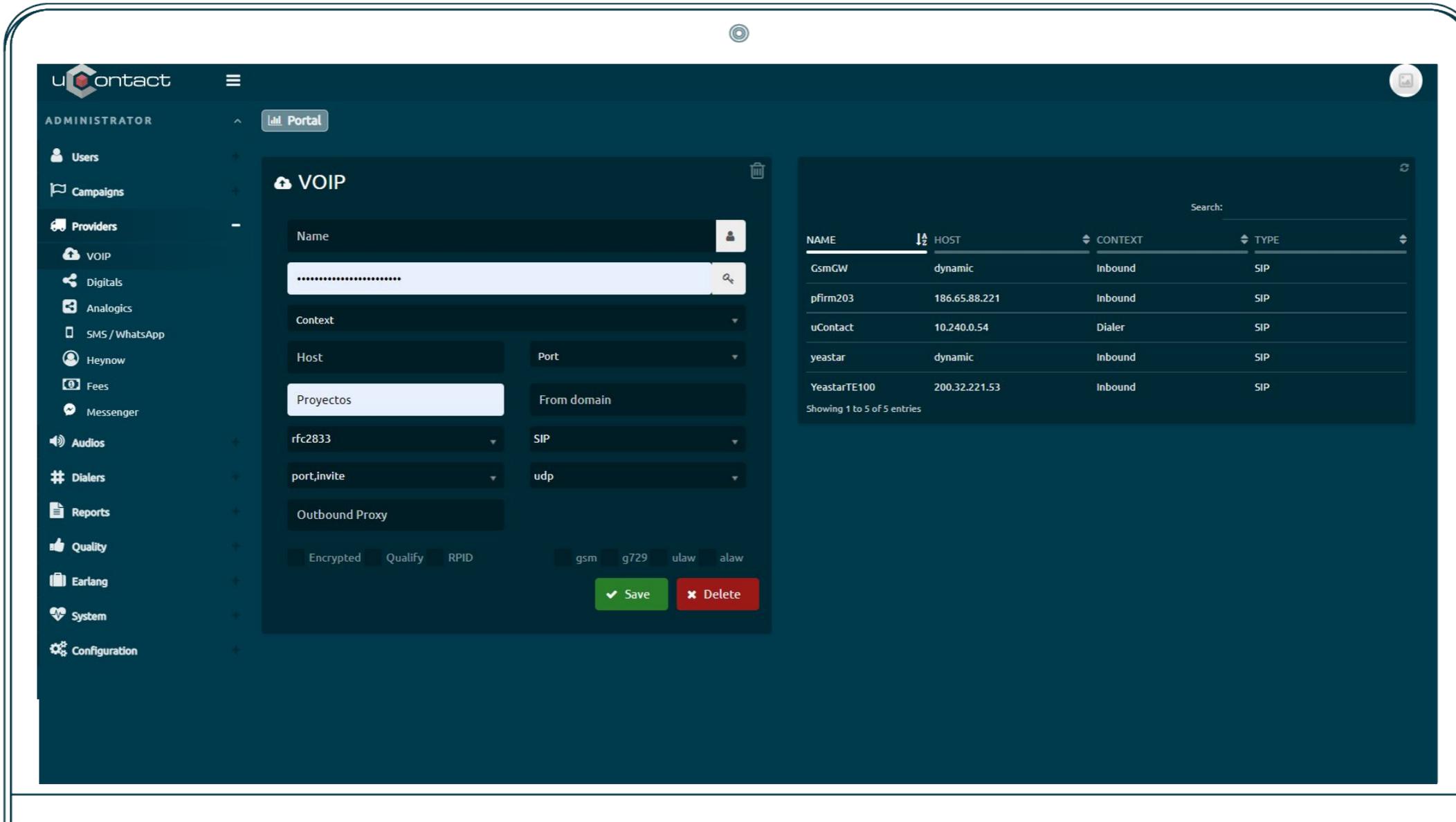
- paused:** Members are considered unavailable if they are paused.
- penalty:** Members are considered not available if their penalties are less than QUEUE_MAX_PENALTY.
- inuse:** Members are considered unavailable if their device status is in use.
- ringing:** Members are considered unavailable if their device status is Ringing.
- unavailable:** Applies mainly to agent channels; if the agent is not logged in but is a member of the queue, it is considered not available.

- invalid:** Members are considered unavailable if their device status is Invalid. This is typically an error condition.
- unknown:** Members are considered unavailable if their device status is Unknown.
- wrap-up:** Members are considered not available if they are currently in wrap-up time after a call has ended.

Exit in empty:

Leave the campaign if it is empty.

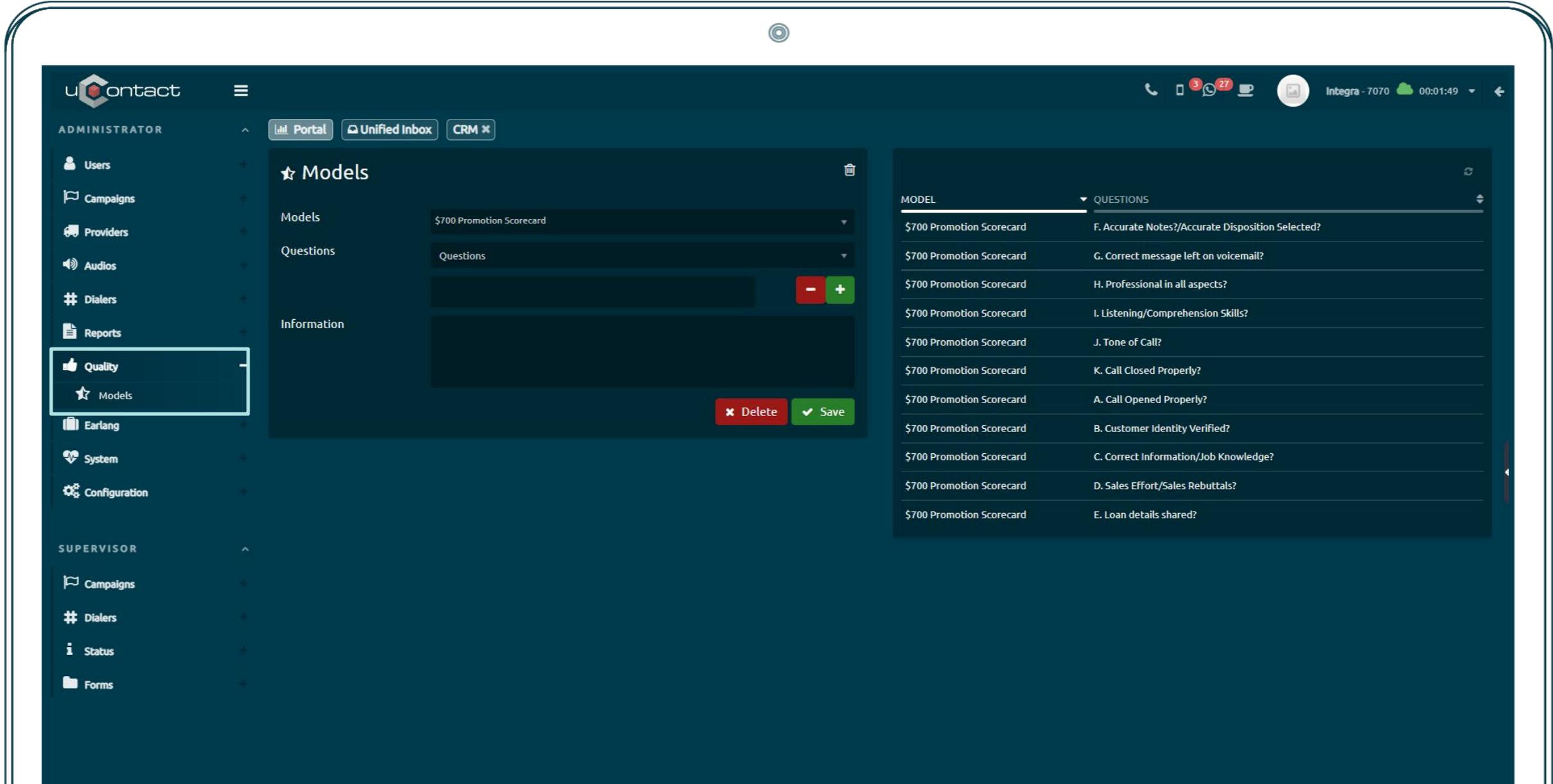




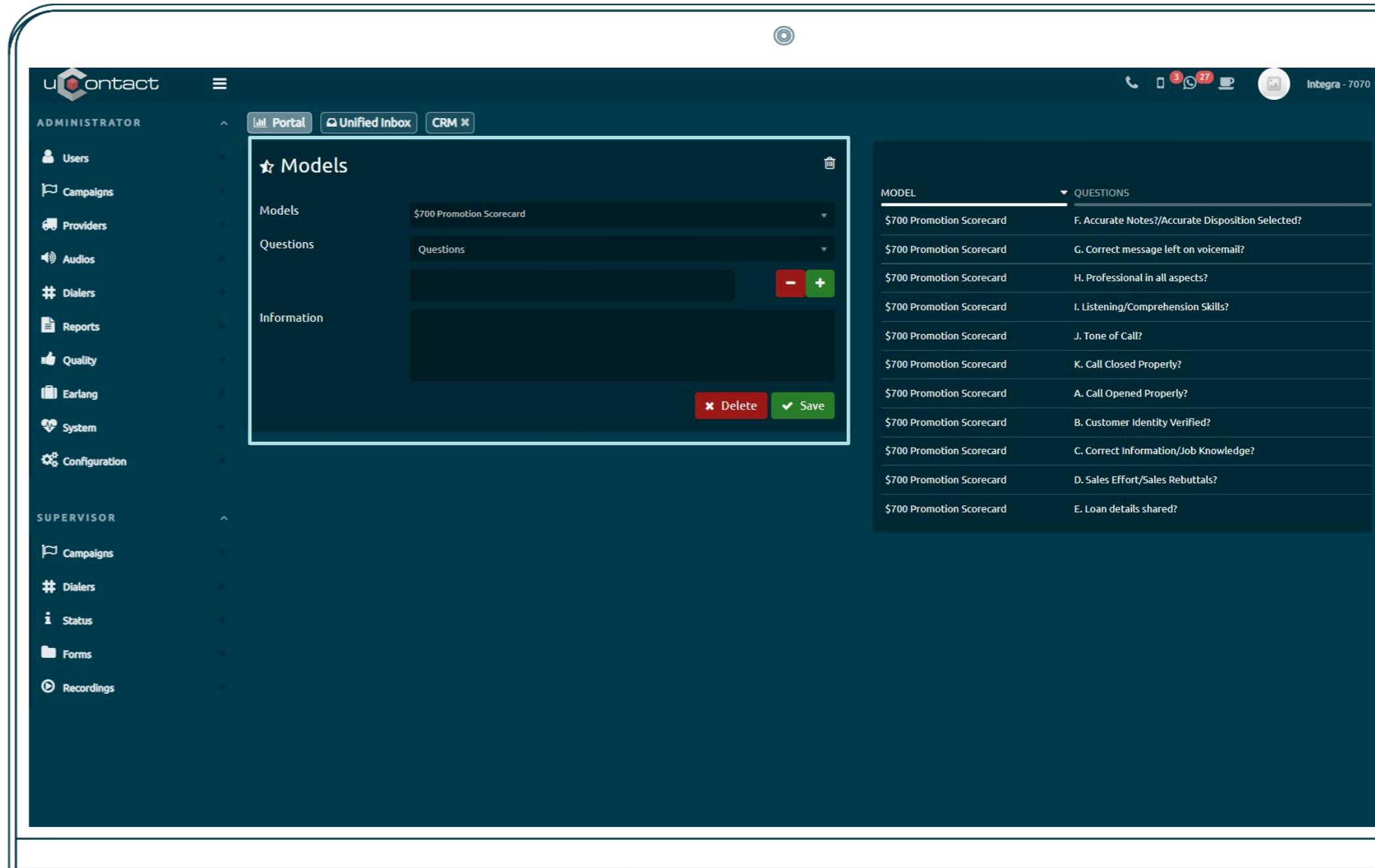
In suppliers, VOIP, a list of all suppliers will be displayed.

These names are those that will then be used in the dialing chain.

In this case the provider "Facu" in the marking chain would go: SIP / Twiglio



You must enter the name of the quality model and their respective questions, the information is the text that will be displayed for each question.

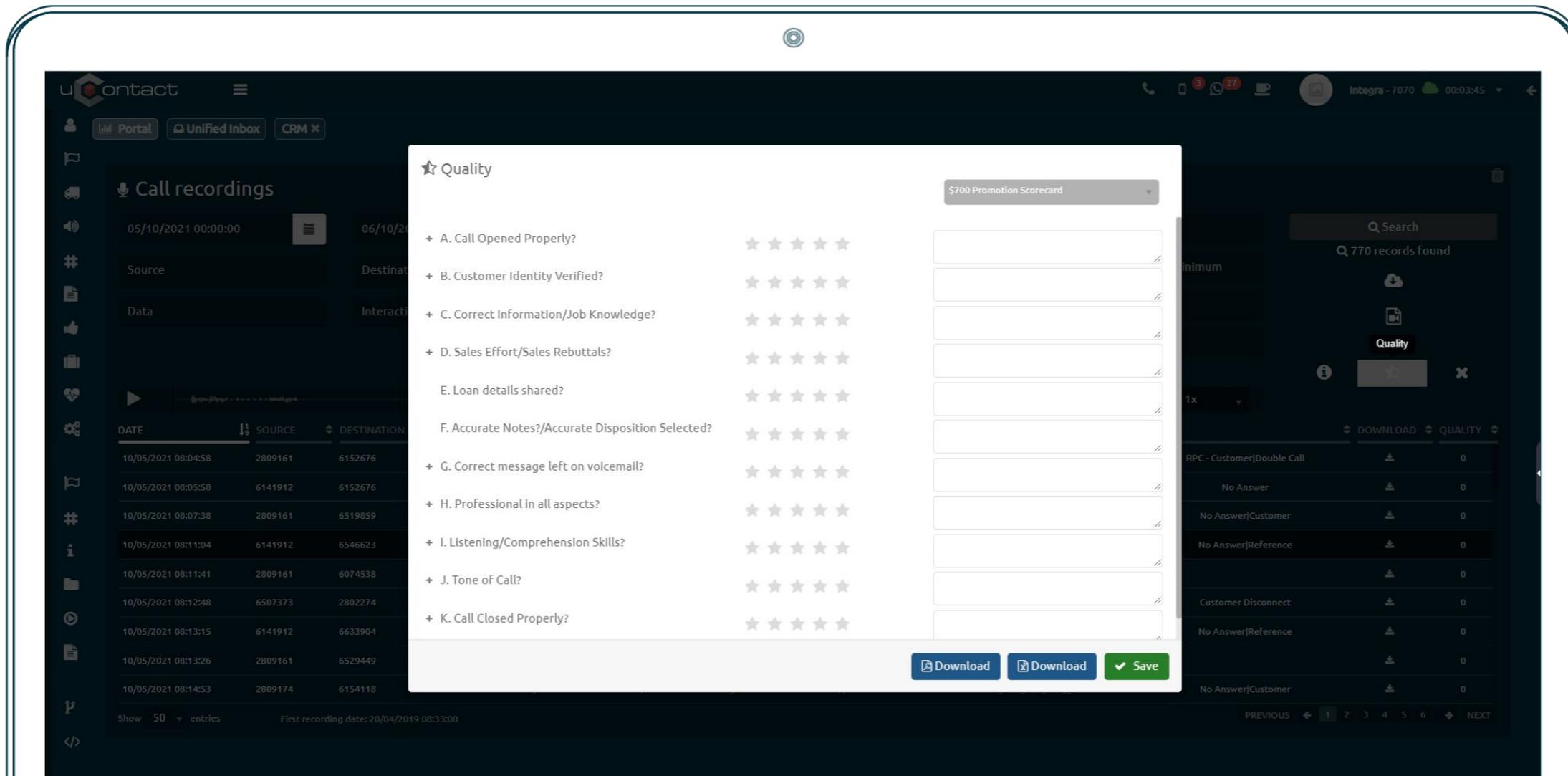


The screenshot shows the 'Call recordings' section of the ucontact CRM. At the top, there are filters for 'Source', 'Destination', and 'Data'. Below these are search fields for 'Search campaign' and 'Search agent'. A 'Time range' filter is set to 'Calls' with a 'Minimum' value. A search bar on the right shows '770 records found'. Below the filters is a table of call recordings with columns for DATE, SOURCE, DESTINATION, DURATION, ACCOUNT, SOURCE CHANNEL, ACCOUNT, DESTINATION CHANNEL, CAMPAIGNS, DATA, DOWNLOAD, and QUALITY. A star icon is highlighted on the table, indicating a recording to be evaluated.

DATE	SOURCE	DESTINATION	DURATION	ACCOUNT	SOURCE CHANNEL	ACCOUNT	DESTINATION CHANNEL	CAMPAIGNS	DATA	DOWNLOAD	QUALITY
10/05/2021 08:04:58	2809161	6152676	00:05	jfuentes	SIP/7022	jfuentes	SIP/pfirm203	Co_LCCA_Out_linear_Man->	RPC - Customer Double Call	📄	0
10/05/2021 08:05:58	6141912	6152676	00:07	jfuentes	SIP/7022	jfuentes	SIP/GsmGW	Co_LCCA_Out_Linear_Skip->	No Answer	📄	0
10/05/2021 08:07:38	2809161	6519859	00:05	lgomez	SIP/7024	lgomez	SIP/pfirm203	Co_LCCA_Out_linear_Man->	No Answer Customer	📄	0
10/05/2021 08:11:04	6141912	6546623	01:46	afrancis	SIP/7044	afrancis	SIP/GsmGW	Skip_Trace->	No Answer Reference	📄	0
10/05/2021 08:11:41	2809161	6074538	00:35	Progressive	SIP/7022	jfuentes	SIP/pfirm203	Co_LCCA_Out_Prog_B1->		📄	0
10/05/2021 08:12:48	6507373	2802274	01:15	pfirm203	SIP/pfirm203	jfuentes	SIP/7022	Co_LCCA_In_ringall_Inb<-	Customer Disconnect	📄	0
10/05/2021 08:13:15	6141912	6633904	00:18	afrancis	SIP/7044	afrancis	SIP/GsmGW	Skip_Trace->	No Answer Reference	📄	0
10/05/2021 08:13:26	2809161	6529449	00:19	Progressive	SIP/7024	lgomez	SIP/pfirm203	Co_LCCA_Out_Prog_B1->		📄	0
10/05/2021 08:14:53	2809174	6154118	00:58	Progressive	SIP/7024	lgomez	SIP/pfirm203	Co_LCCA_Out_Prog_B1->	No Answer Customer	📄	0

The recording to be evaluated is selected and then the icon of the star is pressed

The following screen is displayed in which each question from 1 to 5 is evaluated in stars, it is also allowed to leave a comment and even download the quality model in pdf format.





Thanks!

