Campaigns

Hashmi infonet User Guide

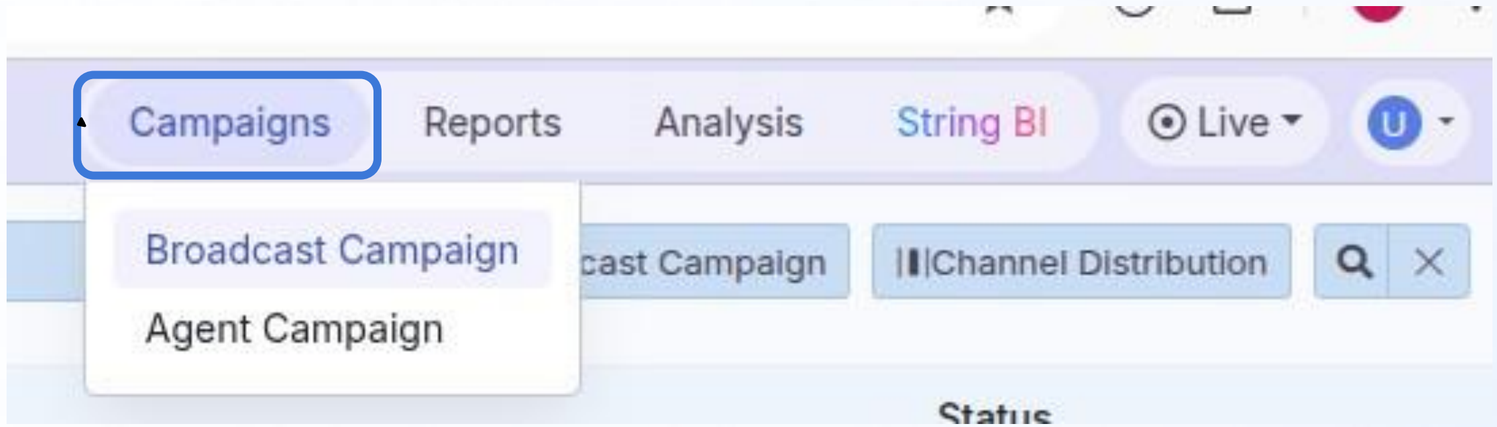
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Campaigns



You can click on the **Campaigns** button present on the **right corner** of the **DeepCall panel**.

Purpose:

Campaigns are used to create appropriate campaigns for clients to forward **automated recorded voice calls** typically used when the client needs to make **announcements** or share **latest updates** with their audience.

Categories:

When you click on the Campaign option, there are **two categories** available:

1. **Broadcast Campaign**
2. **Agent Campaign**

BroadCast Campaign- Overview

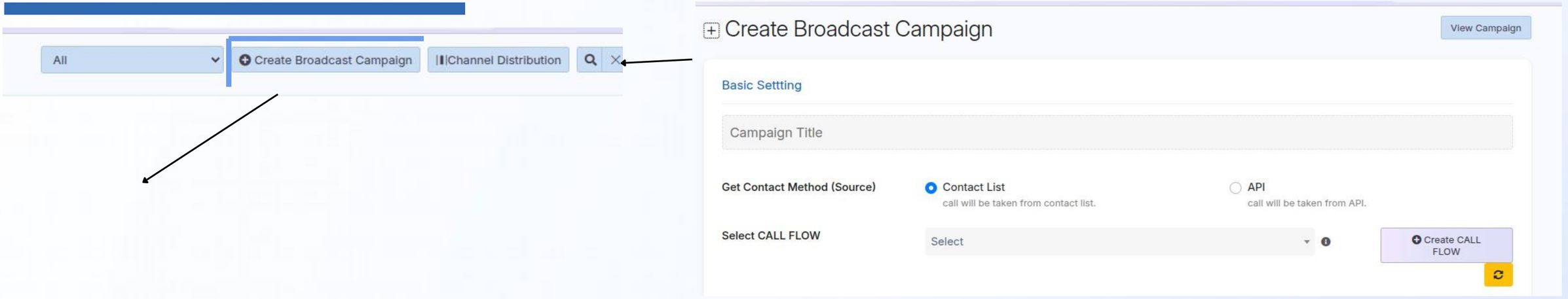


Pre Recorded messages are sent to the contacts listed in the campaign, based on the settings configured during setup.

When you click on **Broadcast Campaign**, you're taken to the **Campaign List**, where the following details are visible for each campaign:

- **Campaign** – Displays the campaign number, along with the date and time it was created.
- **Channels** – Shows the number of channels currently running for the campaign.
- **Time Settings** – Displays the timing configuration set during campaign creation.
- **Report** – Shows key call data, including:
  - **Dialed, Fresh, and Retry** counts
  - **Answered by Agent** and **Missed by Agent**
  - **Answered by Customer** and **Missed by Customer**
- **Status** – Shows the current campaign state (**Running, Paused, Stopped**) along with the **Total Contacts** count. Options to pause or stop the campaign are also available here.
- **Setting** – Provides access to the following actions: **Report, Edit, Update, Live Call View, Allow Quick Call, Dashboard, Duplicate, Push Report Webhook, Campaign Play/Pause History**

Create BroadCast Campaign



Creating a Broadcast Campaign

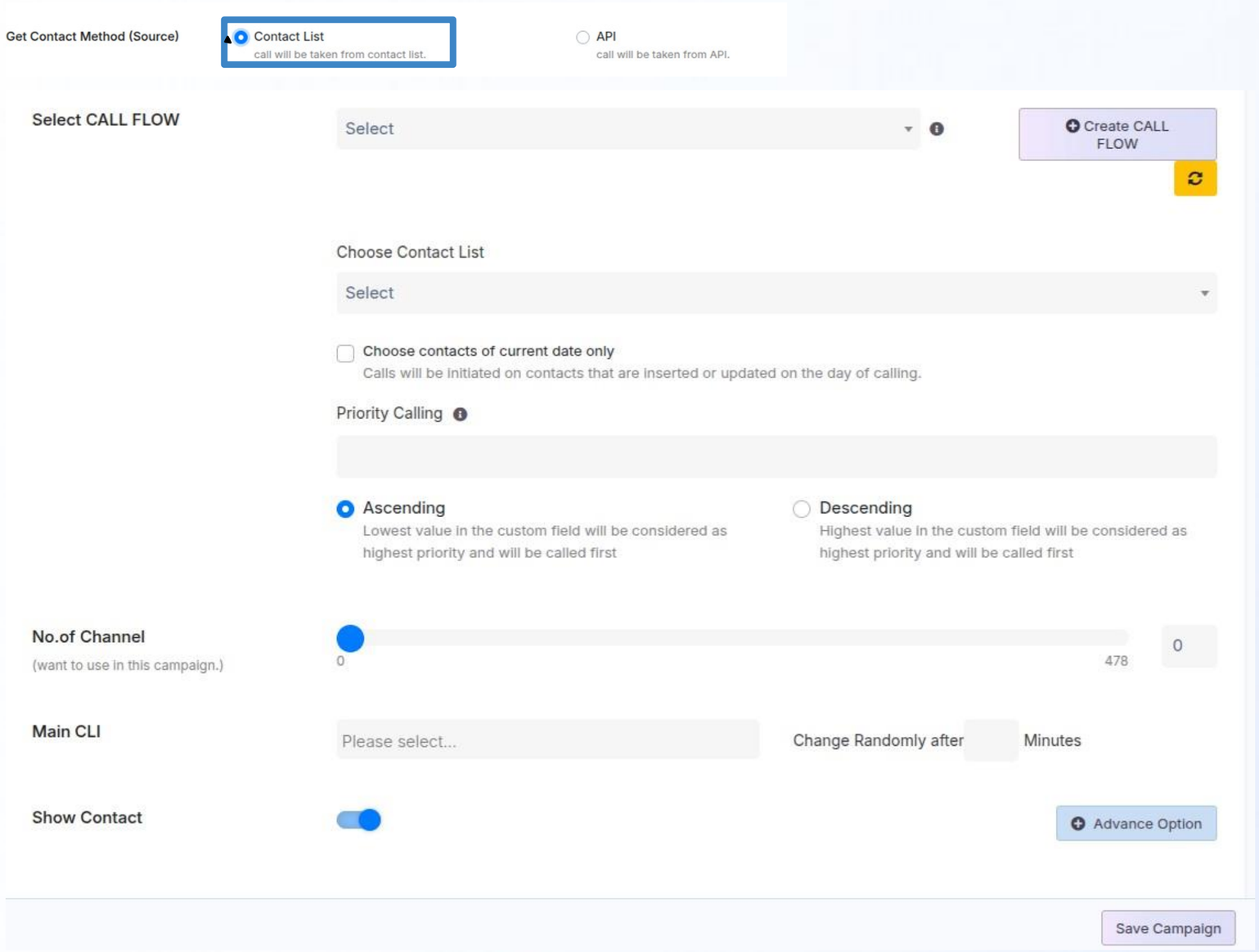
To create a broadcast campaign, click **Create Broadcast Campaign** in the top-right corner of the Campaign panel.

This opens a form where you'll enter the campaign details. Under **Basic Settings**, provide the following:

- **Campaign Title** – Enter a name to identify your campaign.
- **Contact Source** – Choose how contacts will be added: via a **Contact List** (Call will be taken from contact list) or through the **API**(Call will be taken from API).

  Depending on the option you select, additional fields will appear for you to complete.

Contact Method (Source) from Contact List

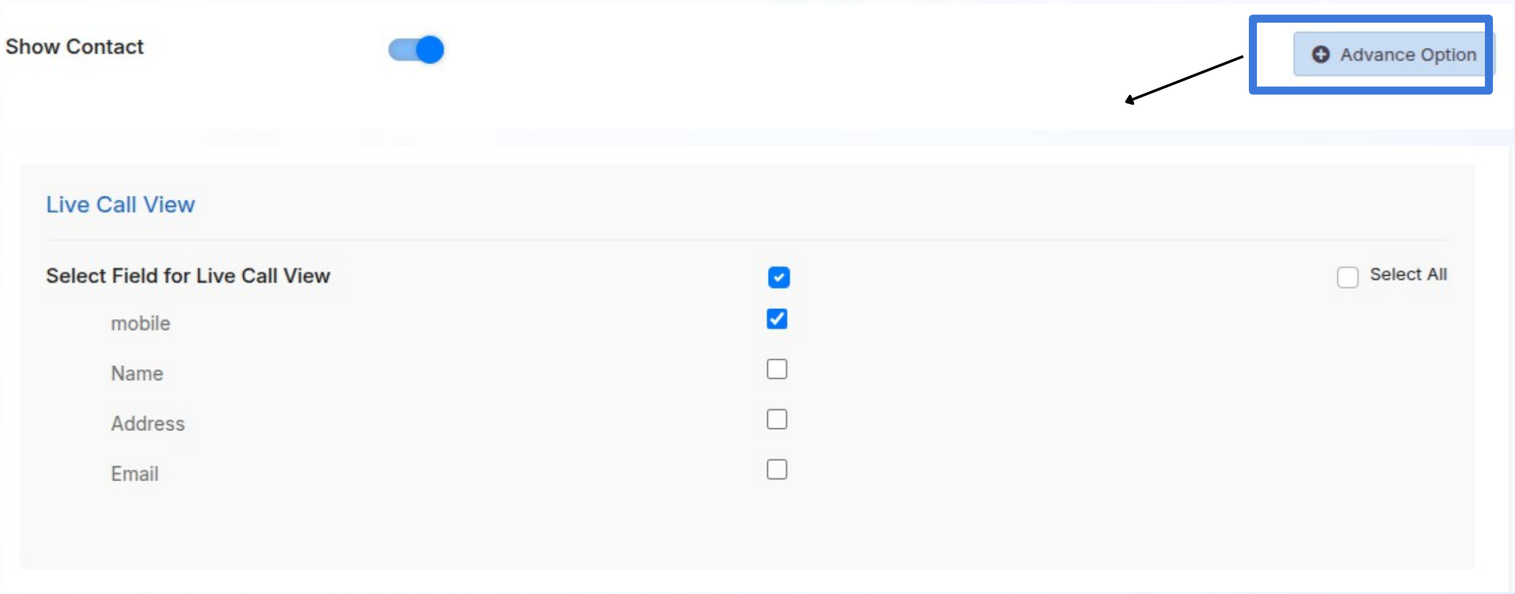


Contact List Options

When you select the **Contact List** option, the following fields appear:

- **Call Flow** – Select an existing call flow from the list, or create a new one.
- **Choose Contact List** – Select the contact list to use for this campaign.
  - **Today's Contacts Only** (checkbox) – When enabled, only contacts added on the current date will be selected from the list.
- **Priority Calling** – Choose **Ascending** or **Descending** to determine the order in which contacts are called, based on their list position.
- **Number of Channels** – Set how many calls should be initiated simultaneously (0 to unlimited). For example, selecting **1** initiates calls one at a time, while selecting **500** initiates 500 calls simultaneously- useful for completing large-scale campaigns quickly.
- **Main CLI** – The phone number from which calls will be initiated.
- **Change CLI Randomly After (minutes)** – Automatically changes the CLI number after the specified number of minutes.
- **Show Contact** (toggle) – Enable to display contact details; disable to keep them hidden.

Advance Option



The **Advance** section provides additional configuration options, starting with:

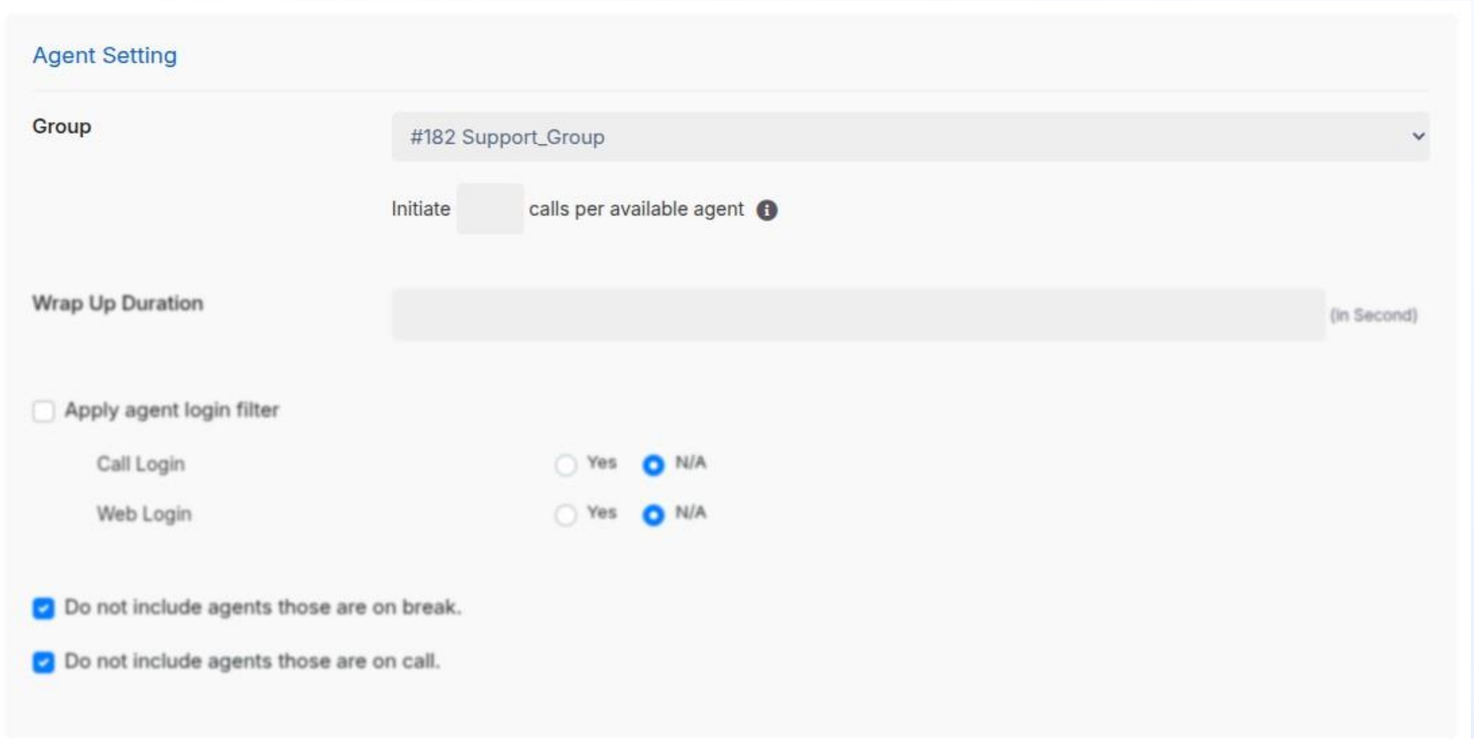
Live Call View

This option lets you choose which contact details are visible during a live call. You can select from four fields:

- **Mobile**
- **Name**
- **Address**
- **Email**

  You can select **all four fields at once**, or choose them **individually** based on what information you need visible. This gives you a clearer, more detailed view of contact information as calls are being made during the campaign.

Advance Option- Agent Setting

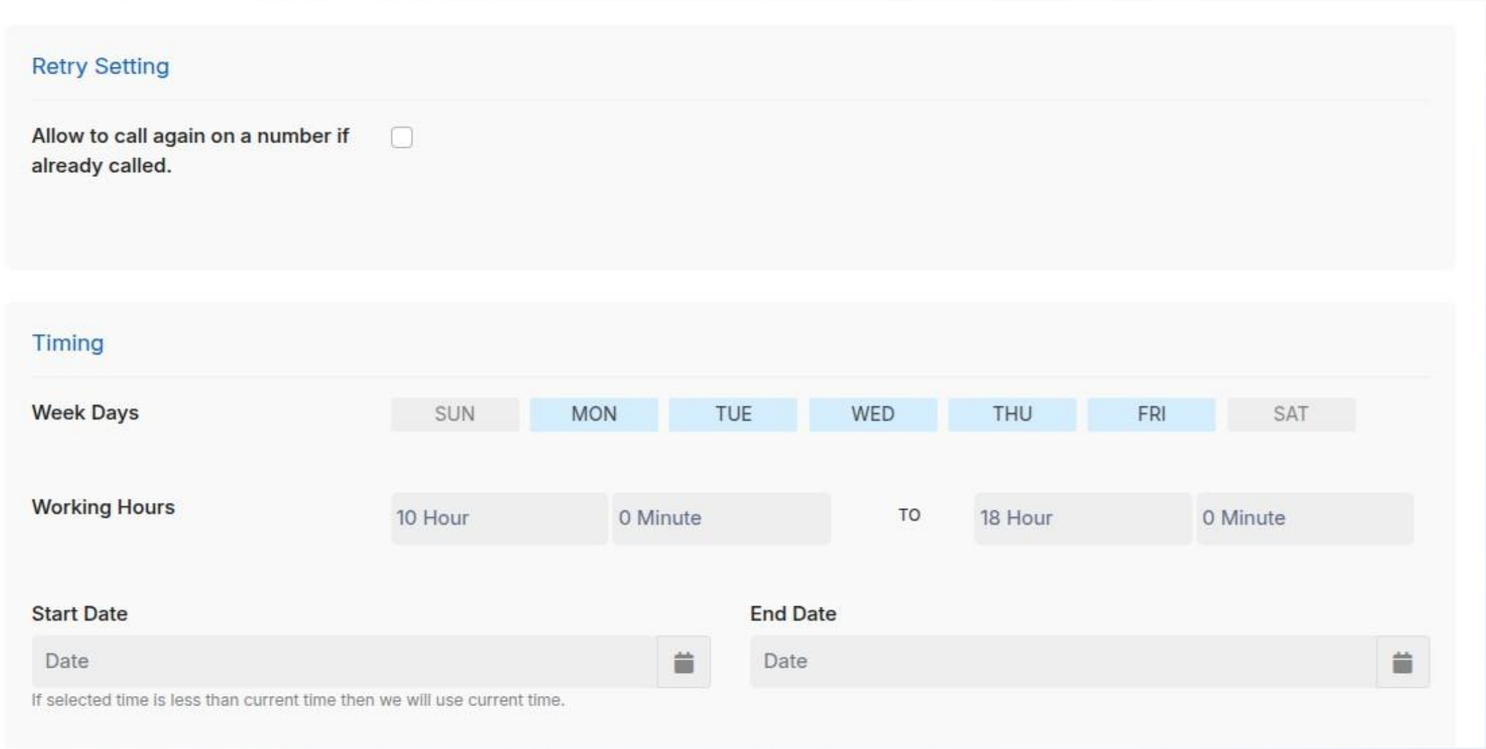


Configure the following options to define how agents are assigned to the campaign:

- **Group** – Select the agent group you want to target for this campaign.
- **Initiate (Number) Calls Per Available Agent** – Specify how many calls should be initiated for each available agent.
- **Wrap-Up Duration (in seconds)** – Set the time allotted to agents after a call ends before they become available for the next one.
- **Apply Agent Login Filter** (checkbox) – Enable this to filter agents based on their login status. Once enabled, choose:
  - **Call Login** – Yes/No
  - **Web Login** – Yes/No

- **Exclude Agents on Break** (checkbox) – When enabled, agents currently on break will not be included in the campaign.
- **Exclude Agents on Call** (checkbox) – When enabled, agents currently on a call will not be included in the campaign.

Advance Option- Retry and Timing Setting



Timing

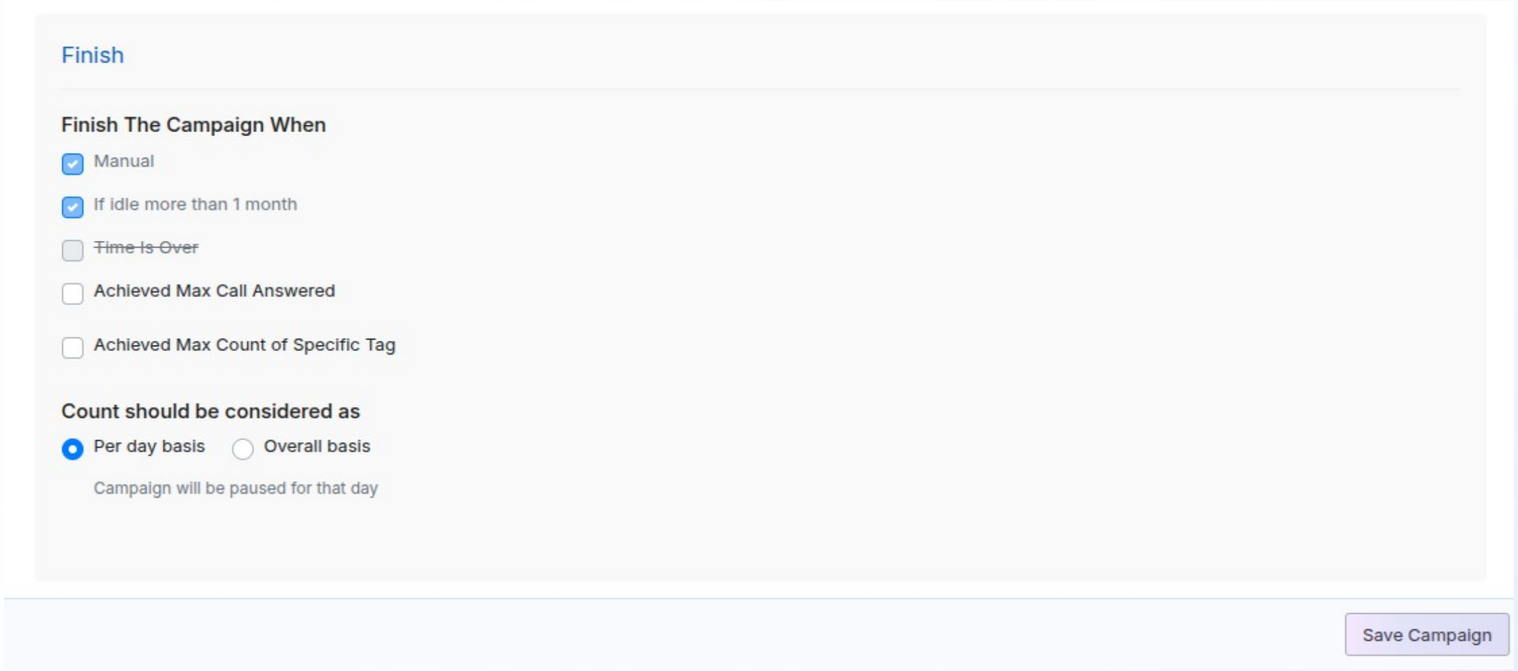
Configure when the campaign should be active:

- **Week Days** – Select the days on which the campaign should run (Sunday to Saturday).
- **Working Hours** – Set the **From** and **To** time range during which calls will be made.
- **Start Date - End Date** – Set the **From** and **To** dates for the campaign's duration.
  Note: If the selected start time is earlier than the current time, the system will automatically use the current time instead.

Retry Setting

- **Allow Recalling Already-Called Numbers** (checkbox) – When enabled, the system will allow calls to be made again to numbers that have already been called.

Advance Option- Finish



Finish the Campaign When

Select the condition under which the campaign should automatically end:

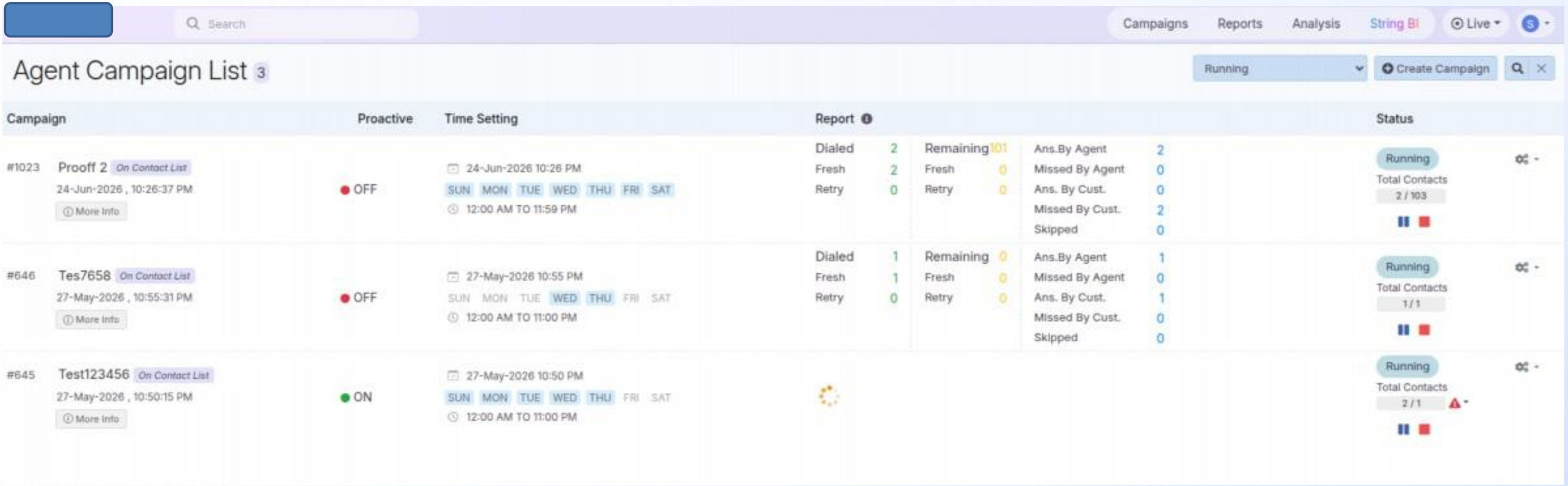
- **Manual** – The campaign will only end when manually stopped.
- **If Idle for More Than 1 Month** – The campaign will end automatically if no activity occurs for over a month.
- **Max Calls Answered Achieved** – The campaign will end once the specified number of answered calls is reached.
- **Max Count of Specific Tag Achieved** – The campaign will end once the specified count for a selected tag is reached.

For the last two options, specify how the count should be calculated:

- **Per Day Basis** – The count resets and is tracked daily.
- **Overall Basis** – The count is tracked cumulatively across the entire campaign.

Note: Once the selected condition is met, the campaign will be paused from that day onward.

Agent Campaign



Campaign ID and **Campaign Name** are used to easily search for and identify each campaign. This section also displays the date and time the campaign was created.

Continue

More Info

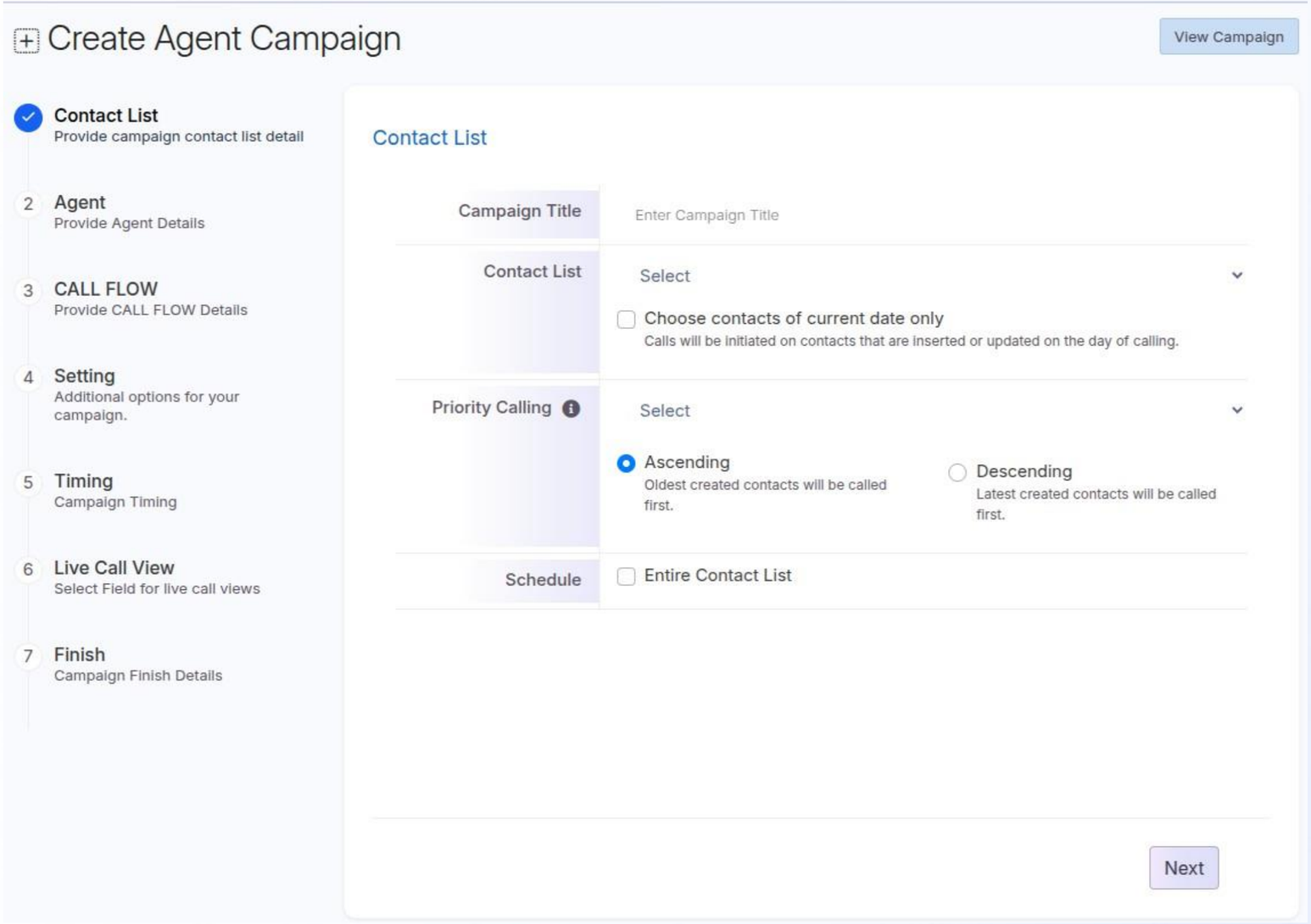
- Clicking the **More Info** tab opens a pop-up with additional campaign details.
- **IVR ID** is clickable, allowing you to view the associated IVR flow.
- Clicking **Agent** displays the contact list used and any segmentation applied.
- The names of the **Group(s)** or **Agent(s)** assigned to the campaign are shown.
- **Agent Login Settings** are displayed here as well, for a quick overview on the same page.

Proactive

Once a call ends, the system automatically dials the next contact from the assigned list, agent-wise.

- **ON** – Contacts assigned to agents are dialed automatically, one after another, at a set interval. Agents do not need to dial manually.
- **OFF** – Contacts are assigned to the agent, who then dials each one manually by clicking the dial button.

Create Agent Campaign- Contact List

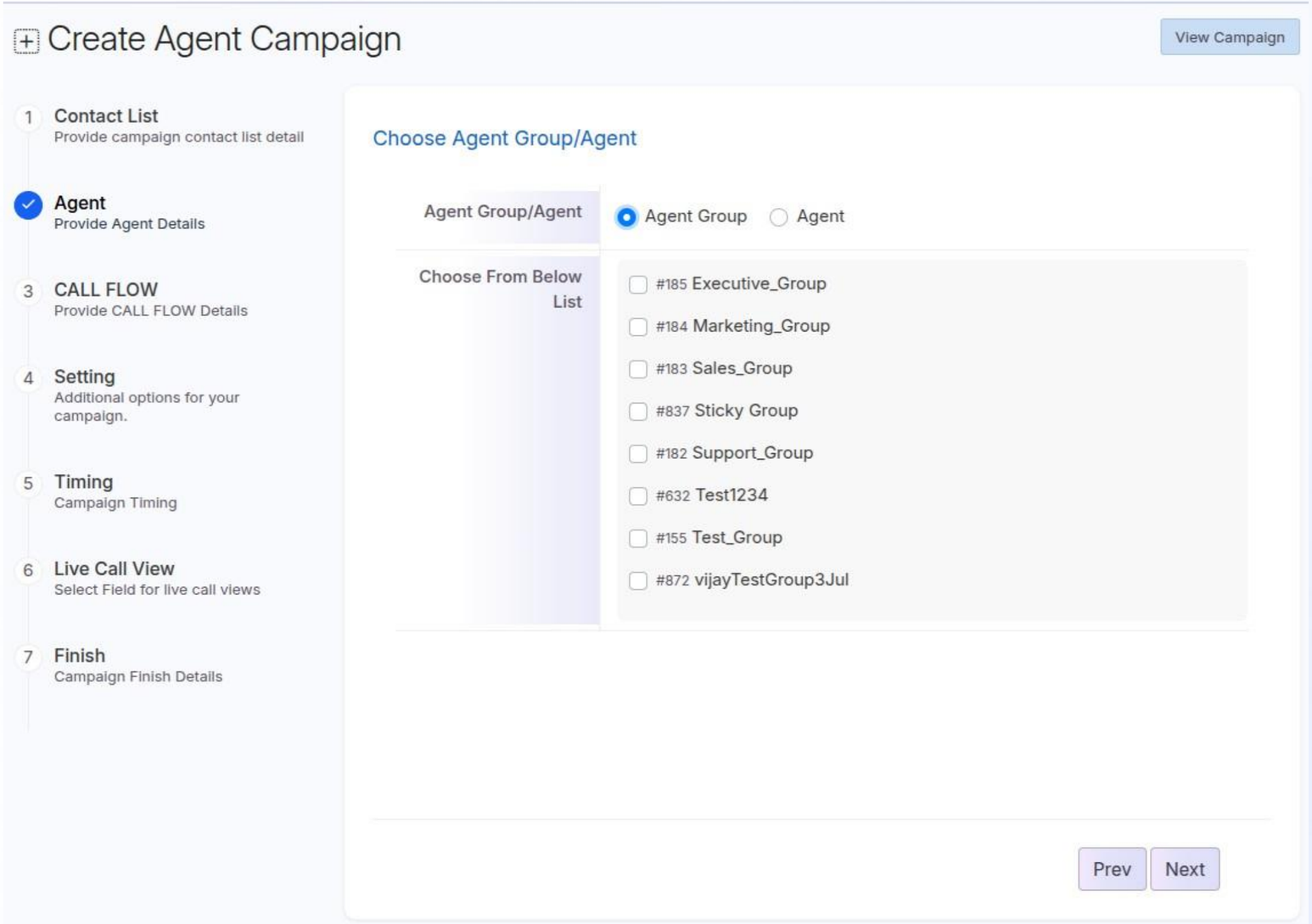


To create an agent campaign, click **Create Campaign**, the same as before we did in broadcast campaign.
A list of settings will appear, starting with:

Contact List

- **Campaign Title** – Enter a name to identify your campaign.
- **Contact List** – Select the contact list to use for this campaign.
  - **Today's Contacts Only** (checkbox) – When enabled, calls will only be initiated for contacts that were added or updated on the current day.
- **Priority Calling** – Choose **Ascending** or **Descending** to determine the order in which contacts are called.
- **Schedule** – Select this option to schedule calls for the **entire contact list**.

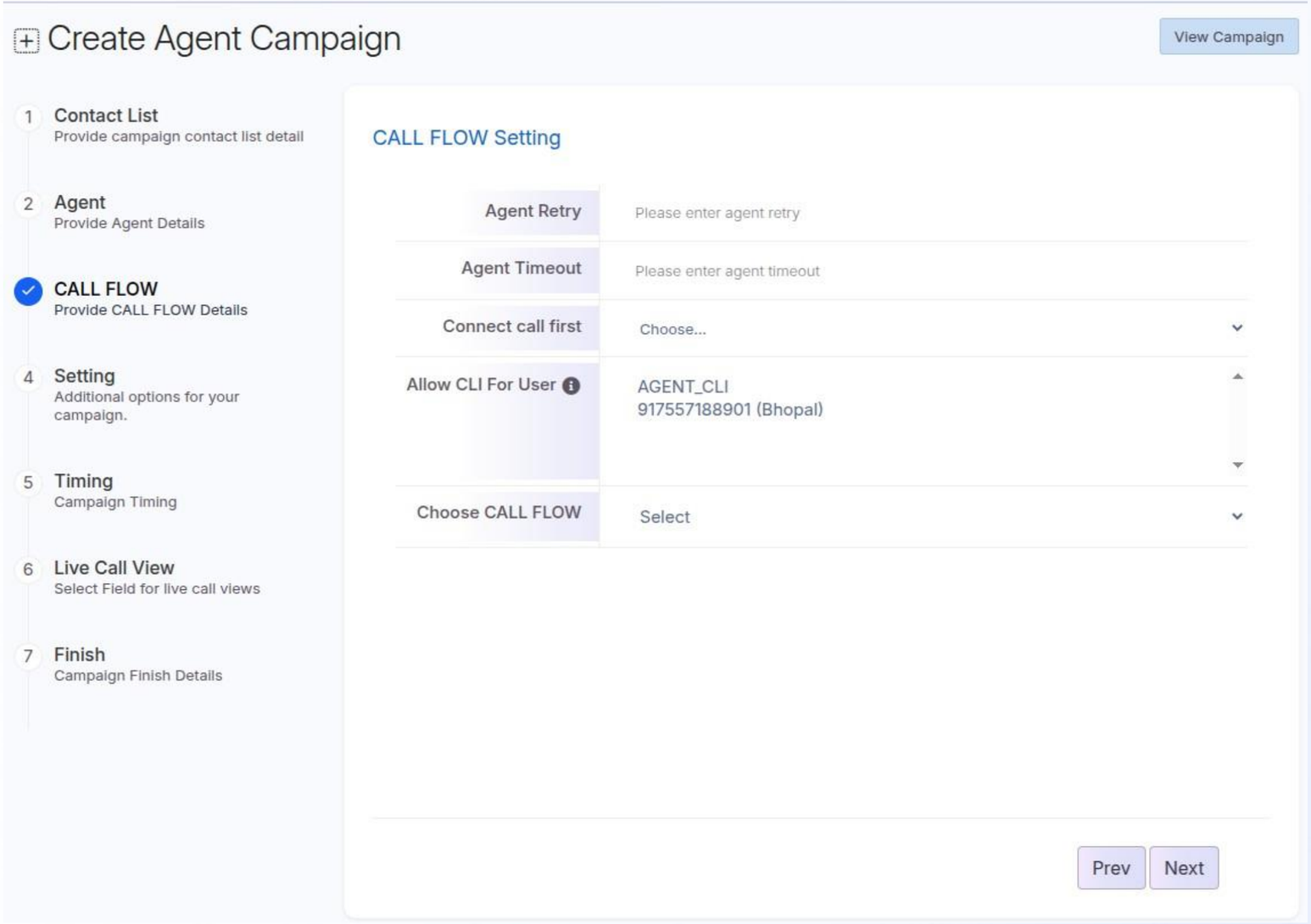
Create Agent Campaign- Agent



Provide Agent Details

- **Choose Agent Group / Agent** – Select whether you want to assign the campaign by **Agent Group** or by individual **Agent**.
  Once you select an option, a list will appear below with the corresponding items (agent groups or individual agents). Select the ones you want by checking the box next to each entry.

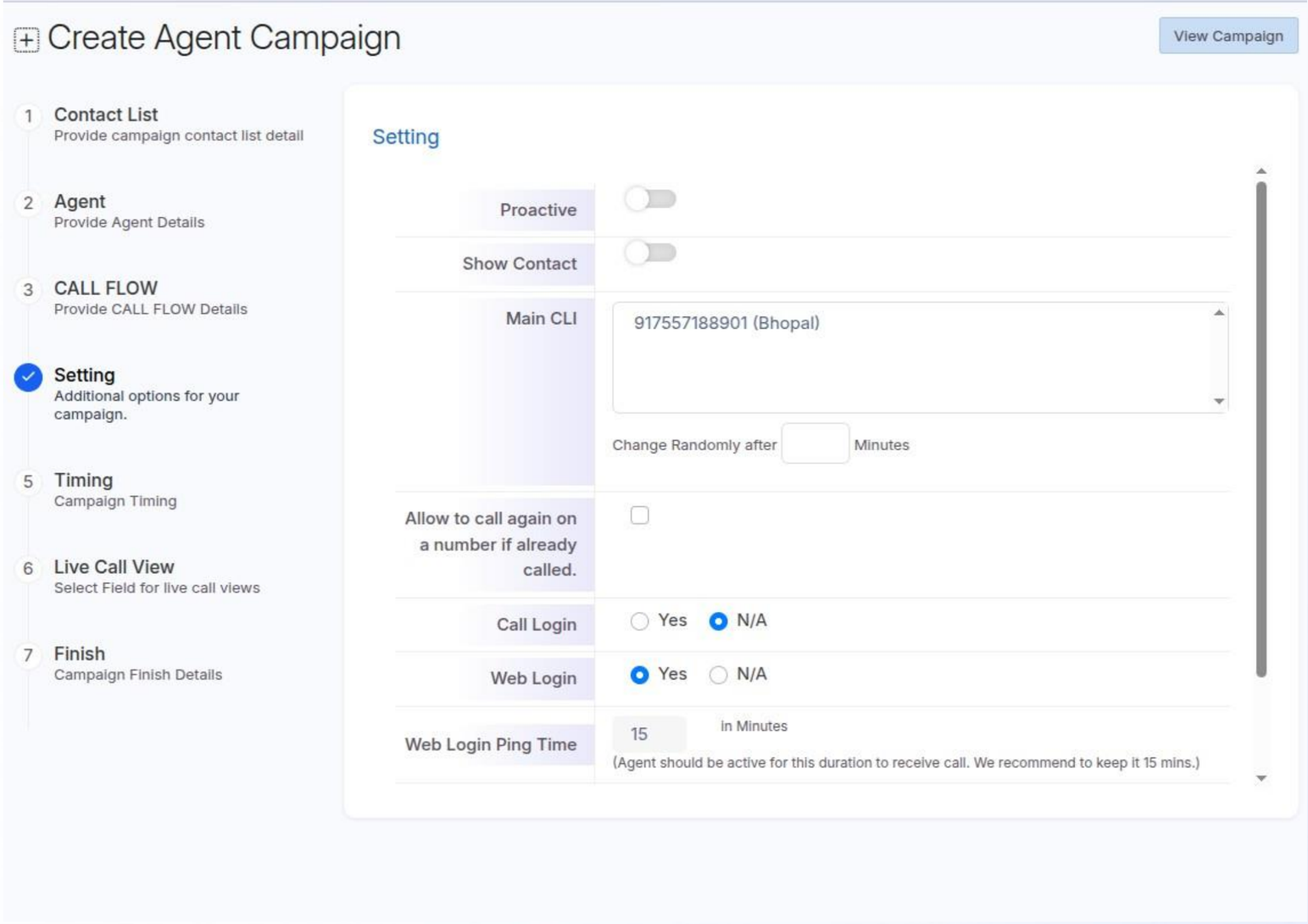
Create Agent Campaign- Call Flow



Call Flow Setting

- **Agent Retry** – Set the number of times the system should retry connecting to an agent.
- **Agent Timeout** – Set the duration to wait for an agent to respond before timing out.
- **Connect Call First** – Choose whether the call should connect to the **Agent** or the **User** first.
- **Allow CLI for Agent** – This option appears only when **Agent** is selected under "Connect Call First."
- **Allow CLI for User** – This option appears regardless of whether **Agent** or **User** is selected under "Connect Call First."
- **Choose Call Flow** – Select a call flow from the list of available options.

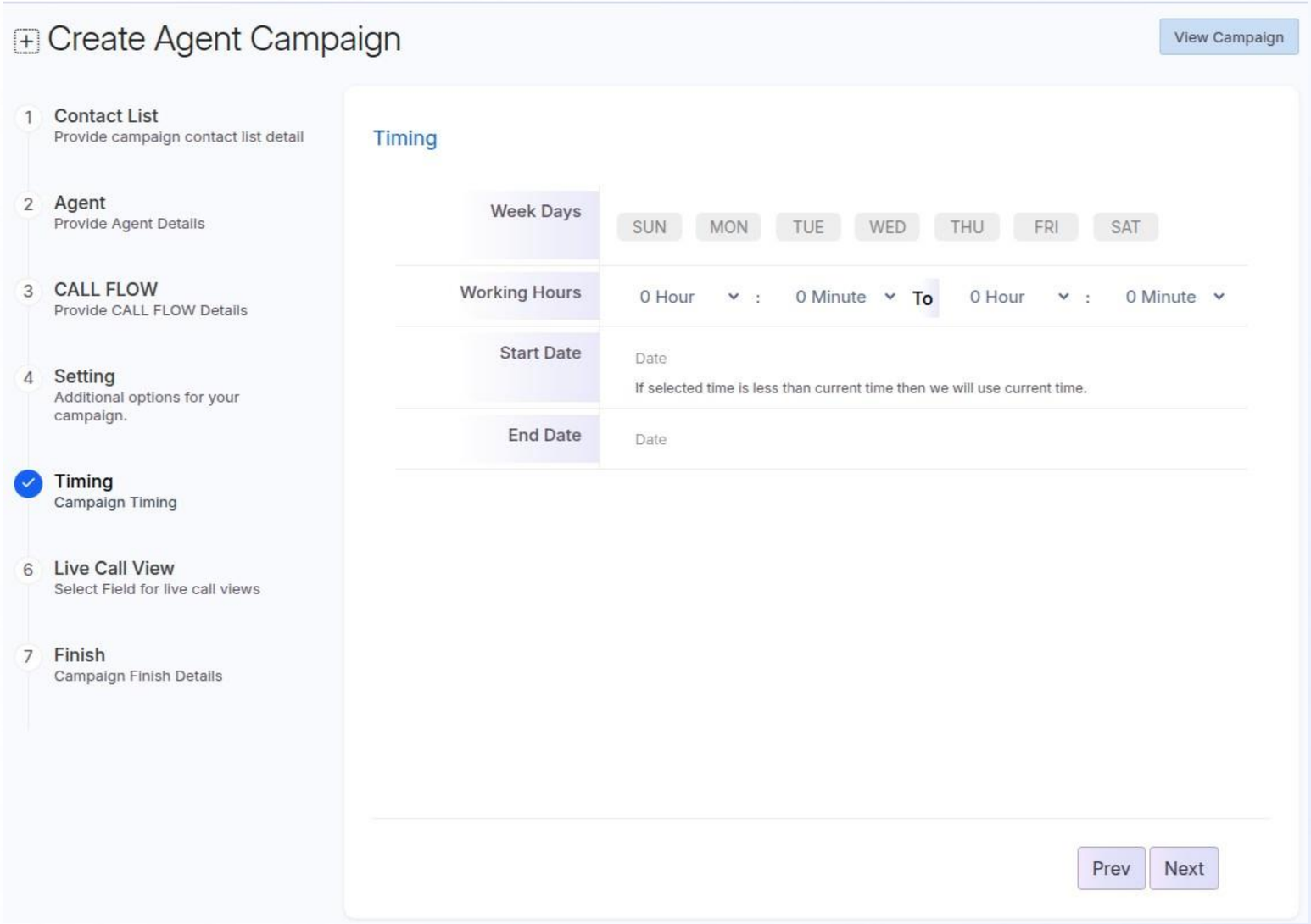
Create Agent Campaign- Setting



Proactive (toggle) – Enable this to activate auto calling for the campaign.
Show Contact (toggle) – Enable to display contact details; disable to keep them hidden.
Main CLI – Enter the CLI number to be used for this campaign.

- **Change CLI Randomly After (Number) Minutes** – Automatically changes the CLI number after the specified number of minutes.
  Allow Recalling Already-Called Numbers (checkbox) – When enabled, the system will allow calls to be made again to numbers that have already been called.
  Call Login – Choose **Yes** or **N/A**.
  Web Login – Choose **Yes** or **N/A**.
  Web Login Ping Time (in minutes) – Set the interval at which agents must remain active to receive calls.
- **Note:** Agents must stay active for this duration to receive calls. We recommend keeping it at **15 minutes**.

Create Agent Campaign- Timing

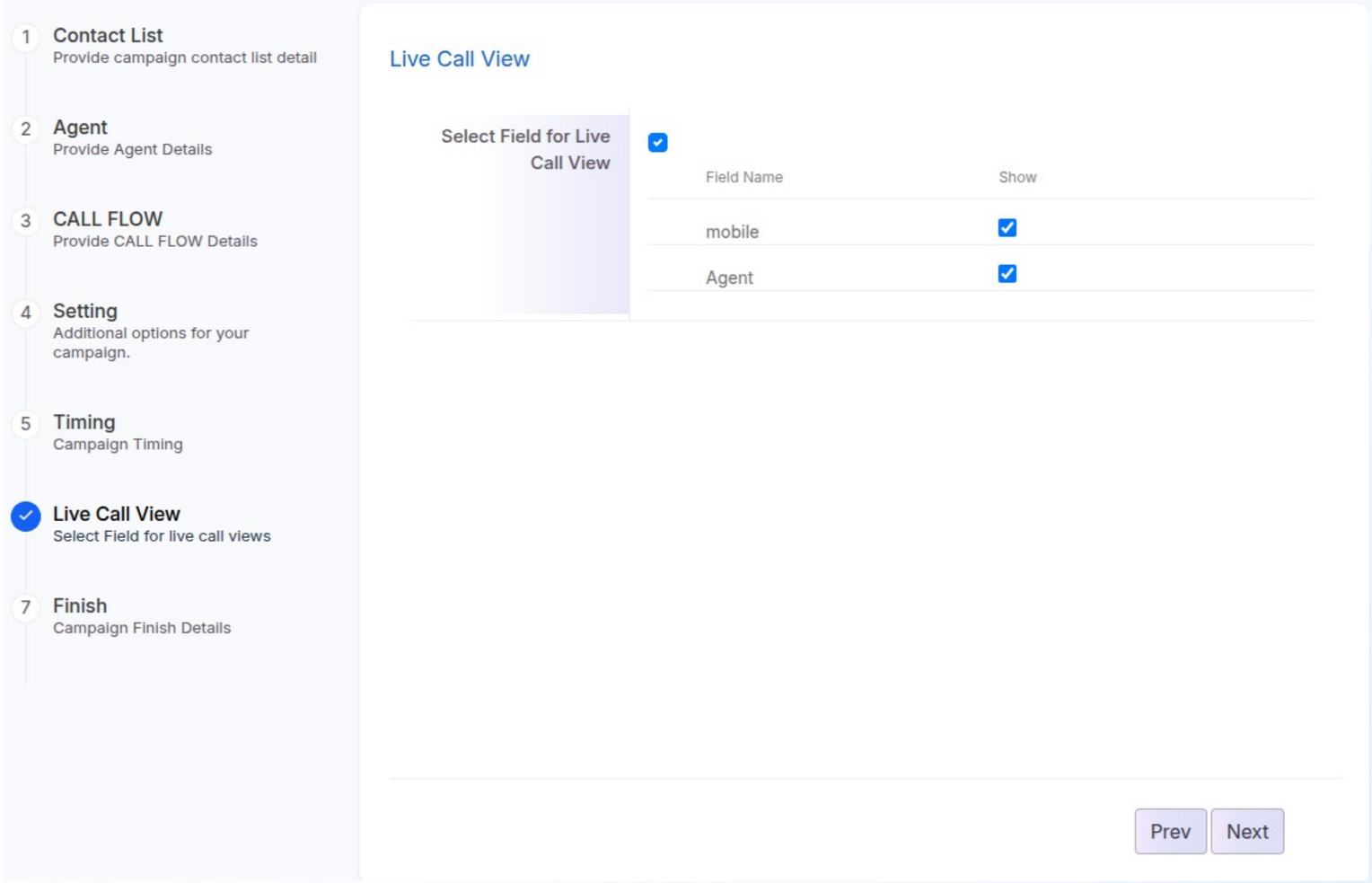


Timing

Configure when the campaign should be active:

- **Week Days** – Select the days on which the campaign should run (Sunday to Saturday).
- **Working Hours** – Set the **From** and **To** time range during which calls will be made.
- **Start Date - End Date** – Set the **From** and **To** dates for the campaign's duration.
  Note: If the selected start less than the current time, then we will use current time.

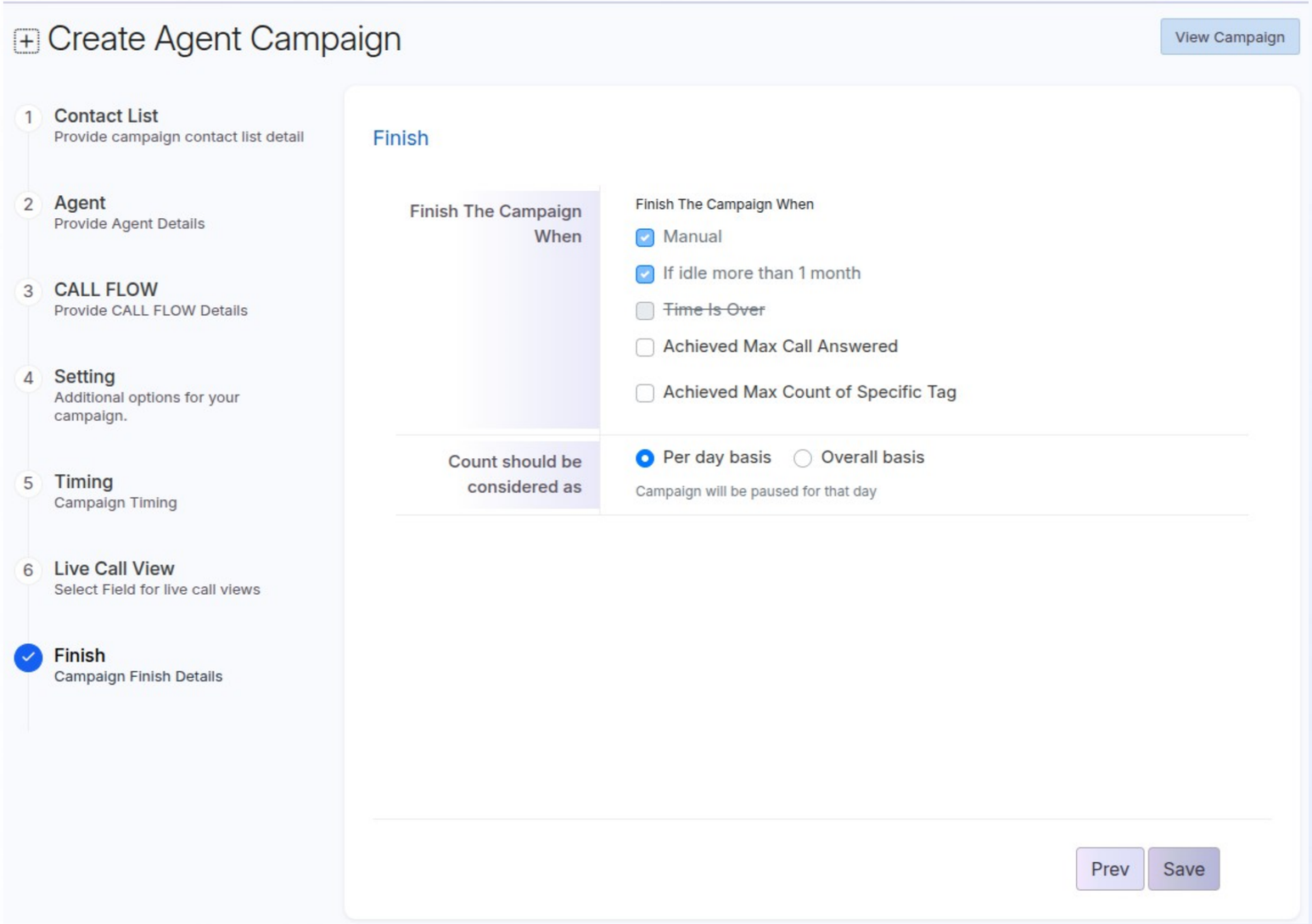
Create Agent Campaign- Live Call View



Live Call View

- **Select Fields for Live Call View** – Choose which details should be visible during a live call, such as **Mobile** and **Agent**. Check the box next to each field you want to display.

Create Agent Campaign- Finish



Finish

Finish the Campaign When

Select the condition under which the campaign should automatically end:

- **Manual** – The campaign will only end when manually stopped.
- **If Idle for More Than 1 Month** – The campaign will end automatically if no activity occurs for over a month.
- **Max Calls Answered Achieved** – The campaign will end once the specified number of answered calls is reached.
- **Max Count of Specific Tag Achieved** – The campaign will end once the specified count for a selected tag is reached.

  For the last two options, select how the count should be calculated by clicking one of the following:
- **Per Day Basis** – The count resets and is tracked daily.
- **Overall Basis** – The count is tracked cumulatively across the entire campaign.

  Note: Once the selected condition is met, the campaign will be paused for that day.

Save the Campaign- Once all settings are configured, click **Save** to finalize and launch the campaign.

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THANK YOU!

DO YOU HAVE ANY QUESTIONS?

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