5.8 Outbound Campaign Tutorials

Bright Pattern Documentation

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How to Reject a Calling Record

Typically, you will indicate your temporary unavailability to receive records for review by changing your status to *Not Ready* while handling a previous interaction. However, if a calling record was delivered to your desktop before you had a chance to make yourself *Not Ready*, you have an option to reject this record.

To reject a record, click the **Reject** button in the preview pop-up window. The system will cancel the request and will attempt to distribute this record later.

Calling record preview pop-up window

After rejecting a record, you will be automatically switched to the *Not Ready* state. You will need to make yourself manually *Ready* when you are ready to receive another call.

Note: Rejected calling records will appear in your performance and activity reports.

How to Review a Calling Record

Calling records, also known as campaign records, include detailed information about a call interaction. This information includes customer name, phone number(s), customer history, previous attempts to contact the customer, and so forth. Campaign records are accessible to agents on the Agent Desktop application. You can access calling records in the following way.

Step 1: Preview campaign records.

- When a campaign record is delivered to your desktop, you will see a pop-up window titled **Preview**, which indicates a preview request. A preview allows you to review campaign records before attempting to contact a customer. The pop-up window will display the campaign name and the customer name.
- Click **Accept** to review the record. (Note that depending on your contact center practices, calling records delivered to your desktop may be automatically accepted for you.)
- Notice that your state will change from *Ready* to *Busy*.

Step 2: Review available information.

- View the customer name and phone numbers from the preview record in the *Contact Info Panel*.
- Click the **History** tab to see if there have been any previous attempts to contact this customer within the given campaign.

- Notice that you will continue to be in the *Busy* state while reviewing the record. You can make yourself *Not Ready* at any time during the review of the given record if you want to make yourself unavailable for any subsequent review requests.

Step 3: Either complete the record or call the customer.

After reviewing the record, you can take one of the following approaches.

If the record appears to have some incorrect or missing information:

- Select the disposition corresponding to this situation.
- Click the **Complete** button to finish processing of this record within the campaign. (The default disposition is called *Bad Record*, but it may be redefined in you contact center. If in doubt, consult your system administrator.)
- Your state will change from *Busy* to *Ready*, and you are likely to receive another preview request shortly.

If the information in the record appears to be valid, but you cannot handle it for any reason:

- Click the **Skip** button. The system will remove the record from your desktop, and will attempt to distribute it later.
- Unless you make yourself *Not Ready* before clicking **Skip**, your state will change from *Busy* to *Ready*, and you are likely to receive another preview request soon. * Note that each instance of skipping a record will be accounted for in the contact center reports.

If the information in the record appears to be valid and you are ready to call this customer:

- Click the phone number in the **Addresses** area.
- If there are multiple numbers, the number recommended for dialing at this time according to the campaign configuration will be marked with a green circle. (Note that depending on your contact center practices, you may be given a certain amount of time to review the record before the system will dial its preferred number automatically.)
- A call attempt to the selected number will be initiated, and the subsequent call handling will be no different from any regular outbound call, except that you would normally be required to set a call disposition according to the call result. For more information, see sections How to Enter Dispositions and Notes and How to Reschedule a Call Attempt.

How to Reschedule a Call Attempt

While participating in an outbound campaign, you normally will be expected to select a disposition indicating the result of every call that you handle. For more information, see section How to Enter Dispositions and Notes.

Depending on the selected disposition, you may also be expected to schedule another attempt to reach the same customer. Rescheduling is typical for situations when, for example, the customer requests that you call again at a more convenient time. You will receive detailed instructions about rescheduling of calls in various situations from your campaign administrator. If the disposition that you select implies scheduling of another call attempt, the **Next call** scheduling controls will be displayed in the *Contact Info Panel* below the *Disposition Selector*.

Example of Next call scheduling controls

Procedure

To schedule another call attempt, follow these steps.

1. Accept the incoming call. Hover your cursor over the customer's phone number or ID that is displayed, and click the **Initiate call** icon to start calling the customer.

   Initiate call to the customer

2. During the active call, you can set the disposition and reschedule the call, or you can do that in After Call Work. If doing that during the active call, use the *Disposition selector* to select the appropriate disposition (any disposition that is not final). That will cause the reschedule options to display.

Select a disposition from the list

3. To reschedule the call, set the following:

    1. **Next call** - The general time range for the next call attempt to be made (e.g., Afternoon, Evening, Tomorrow, etc.)

    Next call time range options

    2. **Timezone** - The desired timezone (e.g., “America/Los Angeles). Depending on the customer’s preferences, you may also have to select another time zone for the time interval that you have entered. Note that changing the timezone will also change the time in the “from/to” fields; we recommend that you always double-check that the correct time is set before completing the interaction.

       Select the time zone

    3. **On** - Set the phone number or ID that the customer wishes to be called on by clicking the small arrow. If you do not select the number, the system will set it to be the customer’s number from the original outbound call.

4. After you have filled in all the reschedule fields, click the **Hang Up** button to end the call.

5. In *After Call Work*, if you have not already dispositioned the call as above, do so now and then complete the call.

Click the check mark to complete the call in After Call Work

Once you have entered the rescheduling information, the call usually can be finished. For more information about terminating calls, see How to Release a Call and How to Wrap Up After-call Work.