



SalesDialers
.com

Shared Campaign – Round Robin

What is Shared Campaign ?

- Shared Campaigns is a campaign shared by multiple agents under the same manager
- Shared Campaign follow Round Robin Algorithm
- Automate **Call** Distribution with **Round Robin**. Our newest **call** flow step, **Round Robin**, allows you to distribute **calls** evenly among your sales team, clients, or any group working under the same campaign
- For sales and marketing, Round Robin can be used to distribute evenly the number of calls to each team member, route the call based on the available agent to receive that call
- Manager will be creating and assigning the campaign to agents under him

MANAGER LOGIN

- Shared Campaigns option will be display in left menu under calling campaigns
- By clicking on Shared Campaigns menu, manager will be redirected to view Shared Campaigns page
- Manager will be creating and assigning the campaign to agents under him

View *Shared Campaigns*

This page only displays campaigns created in last 30 days. If you do not see your campaign on the page, you can use the date filter tool below to view any campaigns that are older than 30 days.

This page contains a list of your available calling campaigns, the campaigns are sorted from newest to oldest and your most recently run campaign is always at the top of the list. You can also use search filters at the top of the page to search for campaigns based on filters like date created or name. From this page you can start, resume, stop or edit any existing campaign by clicking the corresponding buttons next to it.

Created On :

Search Options

Go

Create Campaign

Campaign Name	Contacts	Leads	Lines	Status	
SharedCampaignTest Created On: 04/09/2019 02:50:57 AM Country: United States	6	0	1	Created	 

Step 1 : Upload Contacts

- Manager can create shared campaign by clicking on create campaign button
- By default manager campaign will be selected in the dropdown
- Manager has an option to choose the campaign type, change it to Shared Campaign
- We can assign the shared campaign to multiple agents which are listed in the assign to agent dropdown

Create Campaign Need Help

1 Upload Contacts **2** Campaign Options **3** Format your contacts

Fields marked with * are required

Campaign name*
Enter the campaign name

Country*
Choose your country

Import contact list*
Upload the contact list as a comma separated file (CSV) (Maximum 10,000 contacts) TestContacts.csv

 **Select Campaign Type**

 **Assign to agent***
Select single or multiple agent to assign the campaign

Step 2 : Campaign Contacts

- Shared campaigns will run in single line so we removed the OnHold recordings
- Remaining options are same like the normal campaigns
- Created campaigns are display in view Shared Campaigns page

Create Campaign

- 1 Upload Contacts ✓
- 2 Campaign Options
- 3 Format your contacts

Campaign Setting

Campaign Setting Default Setting Predefined Setting
You can use predefined campaign setting

Fields marked with * are required

Campaign Name: TestCampaigns

Voice recordings

 Answering Machine Recording Preview
Choose the Recording

Enable Recording
If it is enabled, the answered calls will be recorded

Enable Time Zone Protection
Helps you stay in compliance with FTC regulations

Send scheduled appointment mail in outlook format
Send meeting reminders by email when scheduling appointments

Caller ID
This number will be used as a caller ID for outgoing calls.

Phone Ring time
How many seconds phone should ring?

Zillow Search
Find homes in Zillow

Trulia Search
Find homes in Trulia

LionDesk Export Yes No
Push Leads to LionDesk

AGENT LOGIN

- Shared Campaigns option will be display in left menu under calling campaigns
- By clicking on Shared Campaigns menu, agent will redirect to view Shared Campaigns page

The screenshot displays the SalesDialers.com agent login interface. At the top, there is a blue navigation bar containing a search bar labeled 'Phone number or Name', a 'Connect' button, and several notification icons. The left sidebar menu includes options like 'Dashboard', 'Calling Campaigns', 'My Campaigns', 'Shared Campaigns' (highlighted with a red box), 'Create Campaign', 'Calling Reports', 'Campaign Settings', 'Manage Custom Fields', 'Softphone Settings', and 'Disposition Folder'. The main content area features a calendar for April 2019 and a 'New Features' section with announcements for 'SMS Texting' and 'Inbound Calling'. A status bar at the top right indicates the user is logged in as 'Agent' and shows remaining call time and SMS units.

Agent1 (TestAgent1)

April 2019

	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6
8	9	10	11	12	13
15	16	17	18	19	20
22	23	24	25	26	27

You are currently logged in as Agent. You are using a four-line CRM dialer.

You have **4 hours 54 minutes** of call time remaining. You have **1099 SMS units**

New Features

SMS Texting : **Now you can send text messages from within the dialer** ^{New}

Inbound Calling : **Now answer incoming calls** ^{New}

Our Integration Partners

LANDVOICE
Every Lead. Every Source. Every Day.

Our CRM Integrations

VIEW SHARED CAMPAIGNS

- By default **START** button will be displayed for shared campaigns
- Once Agent starts the campaign then **JOIN** button will be displayed for all associated agents

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Created On :

Search Options ▼

Go

Campaign Name	Status
TestCampaign Created On: 04/09/2019 06:08:23 AM Country: United States	Created 
ShaerdCampaignTest Created On: 04/09/2019 05:00:24 AM Country: United States	<div><div style="width: 20%;"></div> 13/52</div> Started  

AGENT CALLING SCREEN

- Shared Campaigns don't have an auto pause feature so before call got hang-up, agent need to click on **LEAVE** button to pause the campaign
- Agent can also pause the campaign by clicking on **LEAVE** button from view Shared Campaigns page

The screenshot displays the SalesDialers agent calling interface. At the top, there is a blue navigation bar with the SalesDialers logo, a chat icon, a 'Disconnect' button, and user profile icons. The main content area shows the 'View Campaign Status' for 'SheardCampaignTest'. A call status card indicates 'Talking...' with the agent's name 'TestAgent' and phone number '12062992131'. To the right, there are controls for 'Time zone protection' (set to Off), 'Available Talktime' (292 minutes), and an 'FTC Compliance Meter' showing 'Abandonment' and 'Dropped calls'. A popup window titled 'TestAgent - Primary Phone (206) 299-2131' is open, displaying contact details in a table and a notes section.

View Campaign Status - Campaign Name: SheardCampaignTest

Send Diagnostics

Time zone protection : Off

Available Talktime: 292 minutes

FTC Compliance Meter

Abandonment

Dropped calls:

TestAgent - Primary Phone (206) 299-2131

Contact Details		Custom Details	
Company	XYZ1	Email	test@gmail.com
Address1	No:10000	Address2	Taylors road10000
City	Newyork	State	California
Postal Code	60100	Salutation	Mr

Notes

CALLING REPORTS

- In Calling Reports, we have added Shared Campaigns in call type dropdown.
- Select Call Type as “Shared Campaigns” then select particular campaign to verify the reports.

View *Calling Reports*



On this page you can view a history of your calls made. Once you set all of your search settings press the “Go” button to do the search, the page will then display the results, showing a list of all of your calls made from newest to oldest. This page also contains the call recordings if you had Enable Call Recording activated, on the right side of the screen, for each recorded call there is a play button and a download button.

Call Type: **Shared Campaign Calls** ▼

Campaigns : **TestCampaign** ← ▼ Prev. runs : **--All--** ▼ Status : **--All--** ▼

Select Date : **April 9, 2019 - April 9, 2019** ▼

Search Options ▼ **Go**

Global Lines 1 ▼

Name	Phone	Called on	Status	Lead Status	Recording
No Name	(305) 222-7913 Primary Phone	04/09/2019 05:16:45 AM	Connected	Cold Lead	
No Name	(303) 900-9115	04/09/2019 05:16:11 AM	Connected	Cold Lead	