



**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 utility icons (calendar, phone, people, envelope, bell, user, folder, and a menu icon). Below the navigation bar, the user is logged in as 'Agent1 (TestAgent1)'. The main content area features a calendar for April 2019, showing dates from 1 to 27. To the right of the calendar, there is a status bar indicating 'You are currently logged in as Agent. You are using a four-line CRM dialer.' Below this, it shows 'You have 4 hours 54 minutes of call time remaining. You have 1099 SMS units'. A 'New Features' section highlights two updates: 'SMS Texting : Now you can send text messages from within the dialer' and 'Inbound Calling : Now answer incoming calls'. Below the 'New Features' section, there is a section for 'Our Integration Partners' featuring the 'LANDVOICE' logo with the tagline 'Every Lead. Every Source. Every Day.' and a section for 'Our CRM Integrations'.

Agent1 (TestAgent1)

Dashboard

Calling Campaigns

My Campaigns

Shared Campaigns

Create Campaign

Calling Reports

Campaign Settings

Manage Custom Fields

Softphone Settings

Disposition Folder

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 <sup>New</sup>

Inbound Calling : Now answer incoming calls <sup>New</sup>

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

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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 central call status box indicates 'Talking...' with a green background and a phone icon. 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 red button with a phone icon and a close symbol is on the left. Below the main view, a blue header for a contact details popup reads 'TestAgent - Primary Phone (206) 299-2131'. The popup contains a table with contact information and a 'Notes' section.

**View Campaign Status** - Campaign Name: SheardCampaignTest Send Diagnostics

Talking... TestAgent 12062992131 Primary Phone

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	<b>Cold Lead</b>	
No Name	(303) 900-9115	04/09/2019 05:16:11 AM	Connected	Cold Lead	