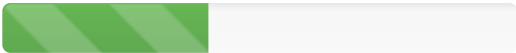




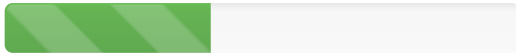
# Select Campaign



Campaign Name  
Date: 12/1/13 - 12/31/14



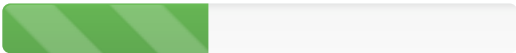
 5/10       5,123



Campaign Name  
Date: 12/1/13 - 12/31/14



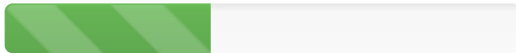
 5/10       5,123



Campaign Name  
Date: 12/1/13 - 12/31/14



 5/10       5,123

Campaign Name  
Date: 12/1/13 - 12/31/14



 5/10       5,123

## Notes

The agent can click anywhere in each campaign to join the campaign.

Call information
User information
Agent information

## Call info

Call Duration  
Number dialed  
Call Status

### Actions

Hold?  
Hang Up  
Smart Drop  
Call Quality  
Transfer/Escalate  
Pause/Break  
Next Call

## User info

Name  
Phone number  
Script  
Questionnaire  
3rd party integrations

### Actions

Call Back  
DNC

## Agent info

Calls made  
Call quota  
Length of session

### Actions

Log out  
Help?

# Call Information

This information relates to the call itself and actions that the agent can make before, during, and after the call. The actions available to the agent change based on the current status of the call. It also informs the agent of the call status and duration.

<b>Call Status</b> Call Duration	<b>Agent Actions</b>
-------------------------------------	----------------------

Below are examples of different call statuses and their available agent actions.

<b>Dialing</b> Duration: 0:05	Hang Up	Smart Drop
----------------------------------	---------	------------

<b>Call Connected</b> Duration: 5:45	Call Quality	Hang Up	Transfer
---	--------------	---------	----------

<b>Call Ended</b> Duration: 12:45	Pause/Break	Next Call >
--------------------------------------	-------------	-------------

## Notes

We would like to prevent actions at certain points during the call. For example, SmartDrop is only necessary for the first part of the call, after that it would be replaced by transfer, which is unnecessary at the beginning of the call.

# Transfers

Transfers can be defined by the admin in advance. Additionally agents can transfer to other agents, groups, and specific numbers. The transfer panel should expand downward over the user information area.

The interface displays a 3x3 grid of transfer options. Each option consists of a user silhouette icon, the text "User X", and the phone number "800-555-5555 x315".

Below the grid, there is a text input field containing "Type in transfer number", a "Transfer" button, and the text "or Cancel".

At the bottom left, the status "Call Connected" is shown with a duration of "5:45".

At the bottom right, there are three buttons: "Call Quality", "Hang Up", and "Hide Transfer".

## Notes

Clicking on user to transfer immediately transfers. Otherwise the user must type in the number and then click transfer. Cancel and "Hide Transfer" should both close this drawer.

# User Information

This space displays information regarding the person who is called. The only required information is the phone number, but the other fields will be populated based on the additional rows that come from the agent or admin when they create their list. The agent can only take two actions for the user, add them to the "Do Not Call" list or set a time to call the user back later.

John Doe  
310-555-5555

Age: 35  
Income: 35k

Last Donation: \$35  
Total Donations: \$250

Sex: M  
Location: CA

Add to DNC

Call Back Later

Script

Questionnaire

CRM

Application

Hello, Mr. Smith, my name is Chris Winston. Carlos Ramirez thought we should connect. I help human resource departments keep their HR systems up to date. Do you have a moment to talk about how well your system is working for you? (pause for response)


If your current system isn't meeting your needs, I can fix errors, install upgrades, make the system easier to use, or help you find a replacement. What type of problems are you experiencing with your system? (pause for response)


(reflect back what you heard) That must be a real drain on your resources. I'm sure I can help you fix those retirement plan reports. I have quite a bit of experience in correcting inaccurate reporting, installing software upgrades, and helping clients meet regulatory requirements. How urgently do you need to get those reports corrected? (pause for response)

(reflect back what you heard) That sounds pretty urgent. I can work with your staff to get that done quickly at an affordable price. It seems like I might be able to give you some assistance. Do you have some time on your calendar when we could meet and talk about what you need?

# User Information

This space displays information regarding the person who is called. The only required information is the phone number, but the other fields will be populated based on the additional rows that come from the agent or admin when they create their list. The agent can only take two actions for the user, add them to the "Do Not Call" list or set a time to call the user back later.

 User X  
800-555-5555 x315  
Direct: 310-555-5555  
Session time: 13:12  
Calls: 4  
Quote: 15  
[Help](#) [End Session](#)

 User X  
800-555-5555 x315  
Direct: 310-555-5555  
Session time: 13:12  
Calls: 4  
Quote: 15  
[Help](#) [End Session](#)

### Contact Supervisor

[Send](#) or Cancel

**FAQ**  
[I can't connect my phone](#)  
[My calls are not connecting](#)  
[I don't know how to do X](#)

**FAQ**  
[I can't connect my phone](#)  
[My calls are not connecting](#)  
[I don't know how to do X](#)

**FAQ**  
[I can't connect my phone](#)  
[My calls are not connecting](#)  
[I don't know how to do X](#)

**FAQ**  
[I can't connect my phone](#)  
[My calls are not connecting](#)  
[I don't know how to do X](#)


[Read more on our knowledge base >](#)

## Notes

We are not sure what help documentation to show here, this is just one layout we could try. "Contact Supervisor" should send an email to the Campaign Admin.

# User Settings

This is to allow the user to edit their settings while they are in a call center campaign. They access it by clicking on their photo/name.



User X  
800-555-5555 x315

Direct: 310-555-5555  
Session time: 13:12

Calls: 4  
Quote: 15

Help

End Session

## Settings

Name

Change picture

Upload

Email address

Set hold music

My Phone Number

Old Password

New Password

or Cancel

[View stats >](#)

## Notes

We are not sure what help documentation to show here, this is just one layout we could try. "Contact Supervisor" should send an email to the Campaign Admin.

# Call Connected

Duration: 5:45

Call Quality

Hang Up

Transfer

John Doe  
310-555-5555

Age: 35  
Income: 35k

Last Donation: \$35  
Total Donations: \$250

Sex: M  
Location: CA

Add to DNC

Call Back Later

Script

CRM1

CRM2

Application

Hello, Mr. Smith, my name is Chris Winston. Carlos Ramirez thought we should connect. I help human resource departments keep their HR systems up to date. Do you have a moment to talk about how well your system is working for you? (pause for response)

If your current system isn't meeting your needs, I can fix errors, install upgrades, make the system easier to use, or help you find a replacement. What type of problems are you experiencing with your system? (pause for response)

(reflect back what you heard) That must be a real drain on your resources. I'm sure I can help you fix those retirement plan reports. I have quite a bit of experience in correcting inaccurate reporting, installing software upgrades, and helping clients meet regulatory requirements. How urgently do you need to get those reports corrected? (pause for response)



User X  
800-555-5555 x315

Direct: 310-555-5555  
Session time: 13:12

Calls: 4  
Quote: 15

Help

End Session