



SmartAgent Training

Bootcamp – Campaign Management

Introduction

The purpose of this guide is to provide you with an introduction to using the aspects of SmartAgent that are unique to your build and should be added as additional Learning materials as appropriate to the access levels of the material contained within

These pages may well best be used and spliced into other module training you wish to run, especially where this concerns high levels of integration into additional software or business processes.

About SmartAgent

SmartAgent is an agent application for Amazon Connect. It runs in your browser and simply requires an internet connection and a headset to enable calls.

SmartAgent has been designed for modern contact centres, aimed at bringing your channels of communication and important systems together to make contact management quicker and easier.

SmartAgent allows for seamless integration into multiple systems and can be launched in a variety of ways such as 2 factor Authorisation, Password login or single sign-on. The particular method to login for your organisation has been outlined in the first section.

Other sections will focus on unique aspects of your build with features that have been built especially for you or integrations with other systems that you may want to highlight to new users. These will appear in any subsequent sections if applicable.

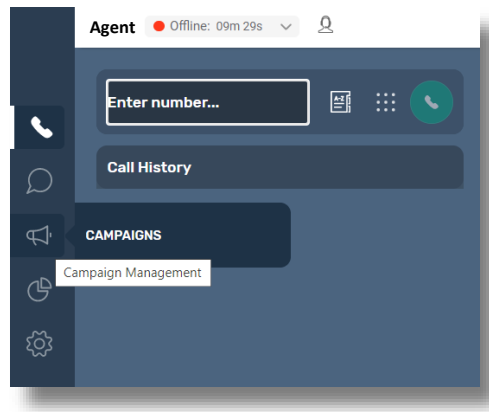
Agenda

Managing & Creating a Campaign **4**

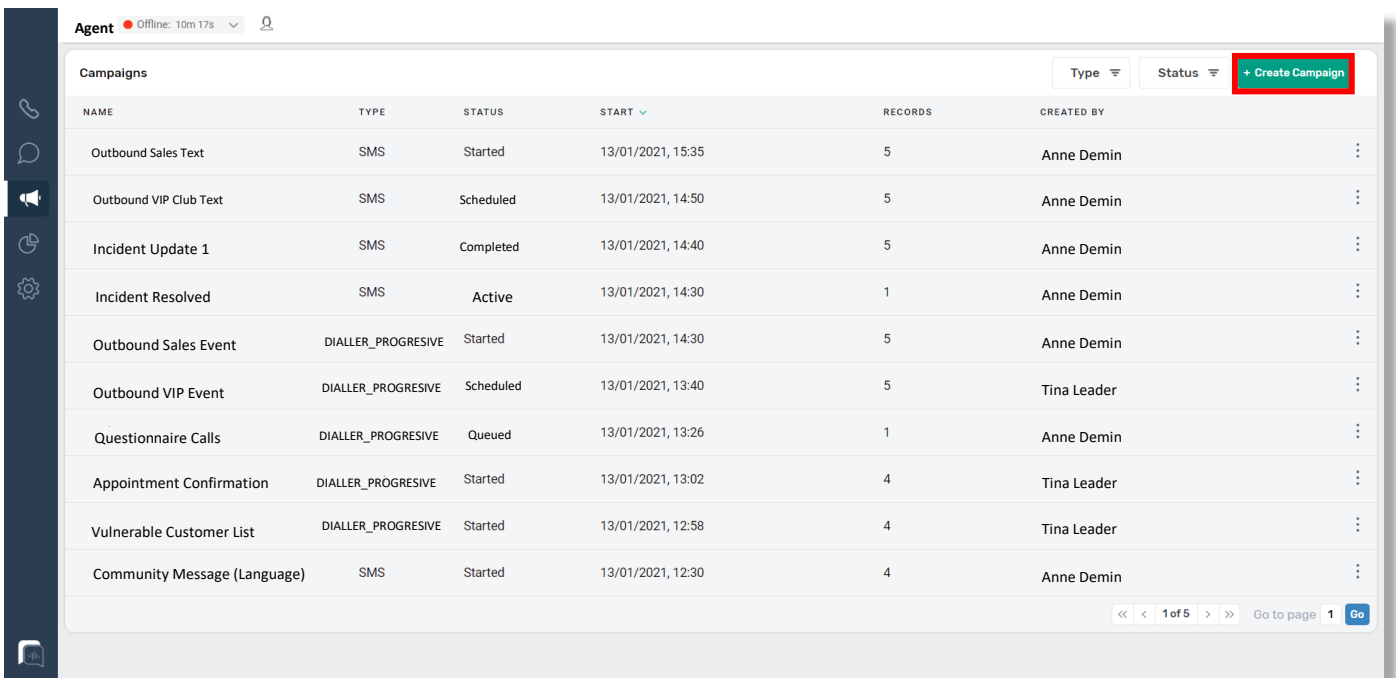
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Managing & Creating a Campaign

Creating and amending an outbound campaign on SmartAgent is easy and can be accessed from the Campaign menu.



From the Campaign summary you can review and edit existing campaigns or select the “add new campaign” button to set up a new campaign.

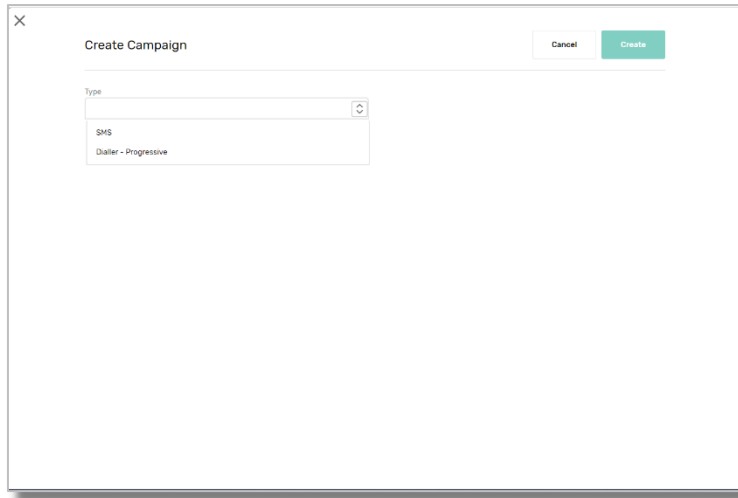


The screenshot shows the 'Campaigns' summary page in SmartAgent. It features a table with columns: NAME, TYPE, STATUS, START, RECORDS, and CREATED BY. A '+ Create Campaign' button is highlighted in the top right corner. The table lists various campaigns, including 'Outbound Sales Text', 'Outbound VIP Club Text', 'Incident Update 1', 'Incident Resolved', 'Outbound Sales Event', 'Outbound VIP Event', 'Questionnaire Calls', 'Appointment Confirmation', 'Vulnerable Customer List', and 'Community Message (Language)'.

NAME	TYPE	STATUS	START	RECORDS	CREATED BY
Outbound Sales Text	SMS	Started	13/01/2021, 15:35	5	Anne Demin
Outbound VIP Club Text	SMS	Scheduled	13/01/2021, 14:50	5	Anne Demin
Incident Update 1	SMS	Completed	13/01/2021, 14:40	5	Anne Demin
Incident Resolved	SMS	Active	13/01/2021, 14:30	1	Anne Demin
Outbound Sales Event	DIALLER_PROGRESIVE	Started	13/01/2021, 14:30	5	Anne Demin
Outbound VIP Event	DIALLER_PROGRESIVE	Scheduled	13/01/2021, 13:40	5	Tina Leader
Questionnaire Calls	DIALLER_PROGRESIVE	Queued	13/01/2021, 13:26	1	Anne Demin
Appointment Confirmation	DIALLER_PROGRESIVE	Started	13/01/2021, 13:02	4	Tina Leader
Vulnerable Customer List	DIALLER_PROGRESIVE	Started	13/01/2021, 12:58	4	Tina Leader
Community Message (Language)	SMS	Started	13/01/2021, 12:30	4	Anne Demin

If you select the “Add new campaign button” you will be presented with different screens, depending on the type of campaign you select.

You will be asked to select the type of campaign, but this can be changed if you change your mind or select the incorrect method.



All types of campaign will need to be given a unique name and we recommend using detailed description to highlight the nature and parameters of the campaign.

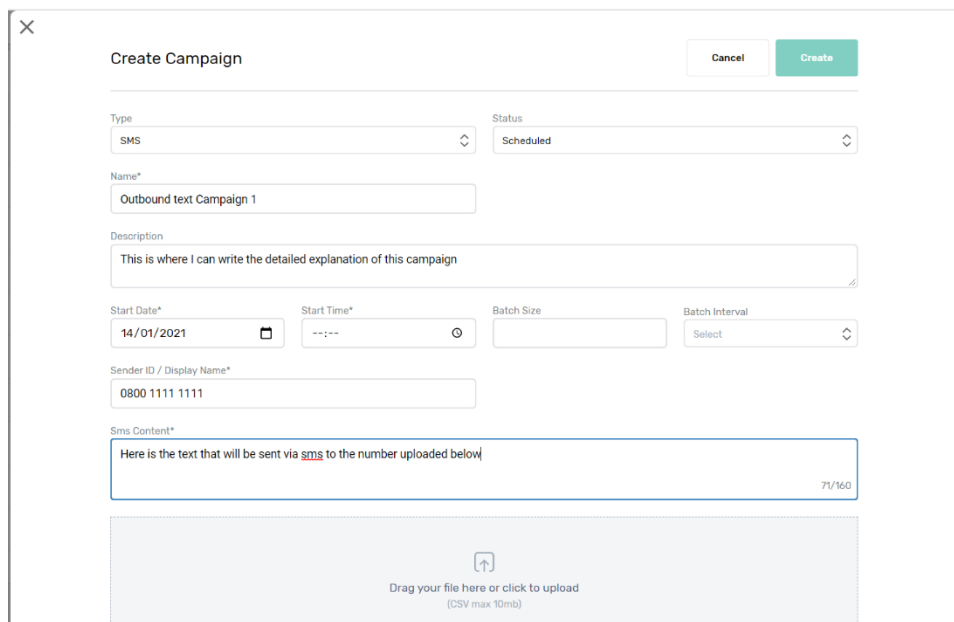
You will then need to select a start date and time for when you want the campaign to start.

If you select an SMS (text message) campaign, once you have completed the standard fields you need to complete the Sender ID / Name Field.

The sender ID / Name field will be what the receiver of the text sees as the name of the text sender. This can be set to be a name or a number.

The batch size and interval fields are not currently active.

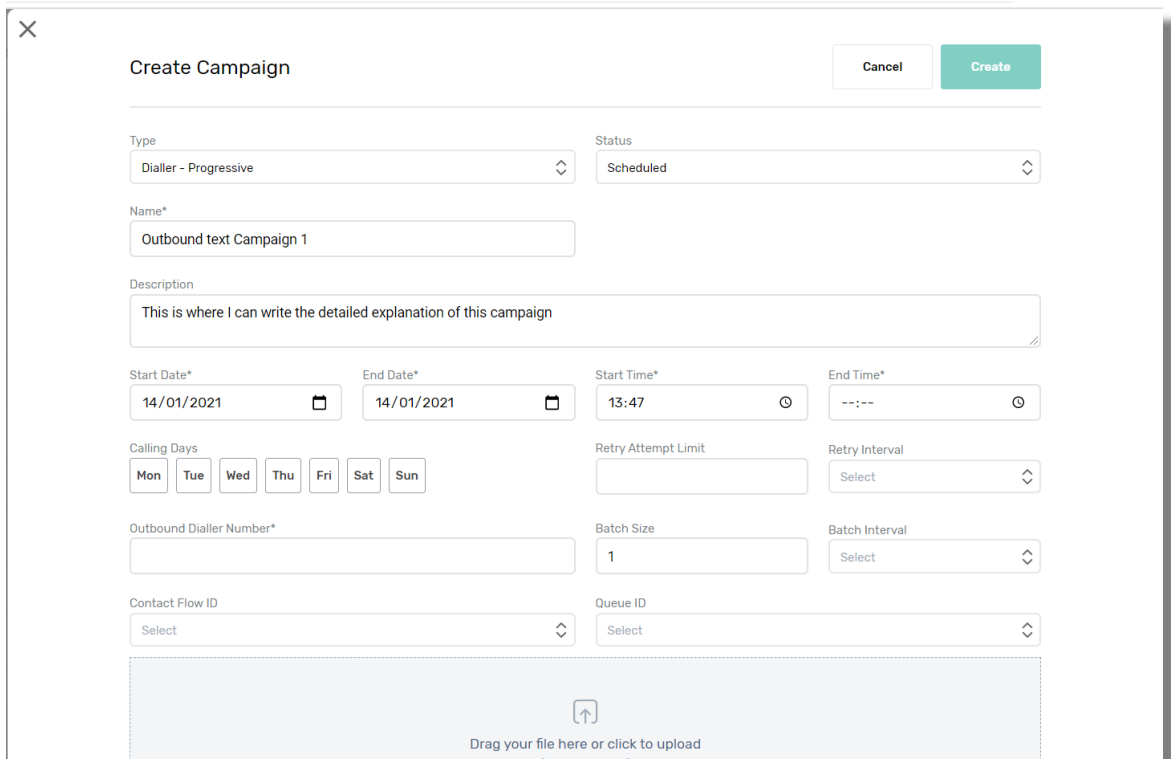
The SMS Content Field will be what is sent as the message to all those in the campaign SMS and can contain text and hyperlinks.



Once all the details are completed you will then need to upload the contact information from a csv file in the agreed format to populate the campaign with the necessary contact information.

NB You should ensure the CSV files do not contain any empty rows of data as this may cause errors and processing delays.

Setting up a “Dialler- Progressive” campaign brings up a slightly different screen with a couple of different fields.



Rather than just start date and time, with a dialler progressive campaign you can schedule calls to be attempted on particular days of the week or at particular times to suit your campaign, for example, weekday evenings.

You can set a retry limit, namely how many times you want to try calling each number, and a retry interval, namely how long a gap to leave before trying to call the same number again.

The outbound dialler number is the number that people will see on their caller display when the call is made to their number

The batch size and interval fields are not currently active.

The Contact Flow ID will need to be selected from the dropdown menu, this will need to be an outbound calling flow that is already present in you Amazon Connect settings.

The Queue ID field will also be set to an outbound call queue, but allows you to further refine which groups of agents will get presented with these outbound calls by selecting agents who access a particular queue.

Once all the details are completed you will then need to upload the contact information from a csv file in the agreed format to populate the campaign with the necessary contact information.

Notes

