



Call Campaigns

User Manual — Plan, run and measure outbound calling campaigns

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1. Getting Started

Call Campaigns is the outbound calling workspace in Indition Business Phone. It decides who your team calls, who makes each call, when calls may happen, what the caller says, and what happens after every call — and it writes the result of every call back to where the person came from. A campaign calls people from one **contact source**: Business Phone's own **call lists** (spreadsheets you upload), your store's **Customers**, or the **Commerce Connection CRM** on sites that have it (section 4.1). This manual is written for everyone who touches a campaign: the people who plan and manage campaigns, and the agents who make the calls. Chapters 1-5 and 7 are mostly for people who manage campaigns; chapter 6 is the agent's guide; chapter 8 applies only to campaigns that call from the Commerce Connection CRM.

1.1 What a call campaign is

A campaign is a planned piece of outreach with a clear purpose — introducing a new product to prospects, winning back quiet customers, or following up renewals. A campaign is the people to call, the agents who call them, the hours it may call, and the stages people move through.

Why you need it. Without a campaign tool, outbound calling lives in spreadsheets and memory: people get called twice in a morning, promised callbacks are forgotten, and nobody can say how the effort is going. A campaign hands each agent one person at a time, keeps promises (callbacks, do-not-call requests) automatically, respects calling hours, and shows results as they happen.

1.2 How a campaign works

Every campaign is built from the same parts:

Part	What it means
People	The people on the campaign. Each one is a record in the campaign's contact source — a row on a call list, a customer, or a CRM contact (or the company itself when it has no contact) — so names and numbers come from that record and are re-read before calls and messages.
Stages	The steps people move through, such as "Initial call", "Follow-up call" and "Send brochure". A stage is either a Call (an agent calls), an Email or an SMS (sent automatically). People enter the first stage.
Outcomes	The answer an agent picks at the end of a call, such as "No answer", "Asked to be called back" or "Became a customer". Email and SMS stages have message outcomes, such as "Message accepted for sending".
Rules	Instructions on each stage: when one of these outcomes happens, do this — move to the next stage, try again in two days, keep them here for a callback, stop as won, and so on.
Agents	The staff switched on to take calls for the campaign. Any of them can also be made a Campaign manager for that campaign.
Calling hours	The weekly windows when the campaign may call or send. Nothing is served or sent outside them.
The queue	Each agent's My Call Queue . An agent presses Start the next call and is handed one person; nobody else can be given that person while the agent has them.

A typical day: a person waits on the "Initial call" stage. When calling hours open, an agent is handed them, makes the call and records "No answer". The stage's rule says "Try this stage again in 1 day", so the person drops out of the queue until tomorrow. Tomorrow another agent reaches them; they say "call me Thursday at 2 PM". The agent records "Asked to be called back" and books the callback, and on Thursday at 2 PM that person is first in that agent's queue.

1.3 Who does what

What each person sees depends on their Business Phone seat and on the access they have been granted in **Manage Permissions**.

Who	What they can do
Agents — staff whose extension has the Sales User or Call Center Outbound Agent seat	Work My Call Queue and the call card: record outcomes and notes, promise callbacks, book meetings, send quick emails and texts, update contact details, skip a person, mark "Do not call again" and hand a call to a colleague. They see only the campaigns they are switched on for: its Overview, its Results figures, the diagram and a person's History. The phone's Campaign tab works the same campaigns. The inbound Call Center Agent seat does not include campaign work.
A campaign manager	Anyone whose row on a campaign's Agents page has Campaign manager switched on. They can change that campaign's setup and the people on it. A campaign manager must also be switched on as an agent, so they can be served calls too.
People who manage campaigns	Granted the campaign screens in Manage Permissions (for example Edit Campaign and Start or Pause Campaign). They create and edit campaigns, stages, rules, messages, agents, calling hours, people, spreadsheet imports, bulk actions, alerts and recovery queues.
People with "See and manage every call campaign, not only the ones you are on"	See and manage every campaign, plus the shared screens: Templates , Compare Selected Campaigns , shared Messages , Call Outcomes and the Do-not-call list .

Good to know. Anyone without the "See and manage every call campaign" permission sees only the campaigns they are on, and can change a campaign only when they are its campaign manager. Otherwise they see "You are not on that campaign." or "Only a campaign manager can change this campaign." When campaigns moved into Business Phone, everyone who could use them before kept the same access.

1.4 Finding Call Campaigns

Campaigns live in the **Business Phone** menu, after **Queues & Agents**. Each entry appears only to people whose access includes that screen.

Where	What it opens
Business Phone > Call Campaigns	The campaign list (section 1.5).
Business Phone > My Call Queue	The agent's personal queue (chapter 6).
Call Center (the agent desktop)	A Call Campaigns card for anyone on a running campaign: pick a Call Campaign (or "All my campaigns"), set Progressive dialing , and press Open campaign workspace to open My Call Queue.
The Phone button	The Campaign tab, for the Sales User and Call Center Outbound Agent seats.
Dashboards	The campaign dashboards (section 7.8), when phone dashboards are on.

The menu entries appear once Business Phone 1.8.9 is installed and switched on. If Business Phone is switched off, its menu shows only Settings and the campaign screens say "Turn Business Phone on in its Settings first." If the campaign tables have not been installed yet, they say "Call campaigns are not installed on this site yet. Apply the Business Phone 1.7.9 database patch, then reload."

On sites with the Commerce Connection CRM

The CRM adds its own ways in, all opening the Business Phone campaign screens: **Add to a call campaign** on the Prospects grid, a segment's **Start a campaign**, the **Call Campaigns** panel on a company, and the **My Call Queue** card on My Desk. The card shows "{n} call(s) ready now", or "No calls are ready for you right now.", with the number logged today and, if the agent has a daily target, how far along they are. **Open my queue** goes straight to the queue. Chapter 8 covers the CRM side.

1.5 The campaign list

Open **Call Campaigns** to see every campaign you can see. Agents see only the campaigns they are switched on for.

What the list shows

Column	Meaning
Campaign Name	Opens the campaign's Overview in a new tab. The purpose is shown underneath. People who manage the campaign get a Manage campaign menu here.
Status	Draft, Running, Paused, Completed or Archived.
People	Everyone on the campaign.
Won	People who ended as won (bold green when above 0).
Due	Open people whose next action time has passed and who are not under review.
Needs Review	People flagged for review, or with a failed or uncertain message. Due and Needs Review link to the Recovery queues.
Agents	Agents switched on.
Start Date / Expected End	Filter with a From / To date range.

Every column has its own filter. The list is sorted newest first and shows 250 campaigns a page (50, 500 and 1,000 are also offered). Tick rows to select them; **Show Full Grid** and **Clear Filters** reset the view. Agents and anyone on a running campaign see a personal line at the top: "{n} waiting for you · {n} logged today", plus their target if they have one.

Buttons and menus

- **My Call Queue** (everyone) and **Create Campaign** (people who manage campaigns) sit in the title bar.
- The **Actions** menu, for people with the "See and manage every call campaign" permission, holds **Export** (all, selected or filtered campaigns, as a spreadsheet), **Messages**, **Templates**, **Compare Selected Campaigns** (shown when 2-6 campaigns are ticked), **Call Outcomes** and **Do-not-call list**.
- The row's **Manage campaign** menu offers **Archive** on any campaign that is not archived, and **Delete** when the campaign can still be deleted (section 5.3).

With no campaigns yet, the list reads "No call campaigns yet" with a **Create a campaign** button. Agents who are not on any campaign see a note asking them to have someone who manages campaigns add them.

1.6 Inside a campaign: Overview, Setup, People, Results

Every campaign page has the same tab bar, so you always know where you are.

Tab	What it holds
Overview	The setup checklist and the only Start calling button, the campaign's figures, Campaign actions, the stage funnel, a summary of the setup and the change log.
Setup ▾	A menu of Settings , Stages & rules , Messages , Agents and Calling hours .
People	Everyone on the campaign, with Add people , spreadsheet imports, Import history , By day , bulk actions and each person's History.
Results	Figures, Needs attention, exports and the Recovery queues.

Agents see a shorter bar: **Overview**, **My Call Queue** and **Results**. On the Overview they see the purpose, the figures, the stage funnel and the setup summary, but not the checklist, Campaign actions, Top up or the change log. On Results they see the figures but not Needs attention or Export people.

The status pill

The end of the tab bar shows the campaign's status: **Draft**, **Running**, **Paused**, **Completed** or **Archived**. Two extra states help with scheduled starts:

- **Scheduled** — a draft with a future start date and nothing blocking it. It starts by itself when the date arrives.
- **Start missed** — a draft whose start date has passed. Hover over it to see what is in the way.

A draft with a future date that still has setup gaps stays **Draft**, with the tooltip "Draft - complete setup before the scheduled start {date}."

Good to know. While a campaign is running, the Setup pages show a banner: "This campaign is running with {n} open people. Saved changes apply to what happens next; past activity is kept." You can change a running campaign; nothing already recorded is rewritten.

2. Creating and Setting Up a Campaign

Setting up a campaign means filling in five Setup pages — Settings, Stages & rules, Messages, Agents and Calling hours — and then adding people. The Overview checklist (section 5.1) tracks what is still missing. This chapter covers the Setup pages except Stages & rules, which has chapter 3 to itself.

2.1 Create a campaign

What it is. The **Settings** page names the campaign, says what it is for and when it runs, and sets the limits that protect the people you call.

Steps

- 1 Open **Call Campaigns** and click **Create Campaign** in the title bar.
- 2 Enter a **Campaign Name** (required, up to 255 characters).
- 3 Enter a **Purpose**: "What this campaign is for, in a sentence. It appears on the campaign list and in the results."
- 4 Choose **Who to call**: "Where the people this campaign calls come from. Results are written back there after each call." The list shows the contact sources on your site — **Call lists**, **Customers** and, where the CRM is installed, **CRM customers and prospects** (section 4.1).
- 5 Choose a **Start Date** and an **Expected End**.
- 6 Review **Limits and meetings** (section 2.2).
- 7 Click **Create campaign**. You see "Campaign created. Add stages, hours and people to it." and land on Stages & rules.

What a new campaign starts with

Setting	Default
Status	Draft
Who to call	Your site's own contact source when it has one (the CRM where installed, otherwise Customers); otherwise Call lists
Limit how many times one person is contacted	On, 5 attempts
Leave a gap between attempts	On, 24 hours
Skip company holidays	On
Calling hours	Monday-Friday, 9:00 AM-5:00 PM
Release overdue callbacks to any agent	Off (30 minutes when switched on)

Good to know. The **Expected End** is "Not enforced - it is what progress is measured against on the results screen." It cannot be before the start date. When you edit an existing campaign, the buttons are **Save** and **Save & continue**; Save & continue takes you back to the Overview checklist. The status is shown read-only: "Use the campaign page to

start, pause or finish this campaign." **Who to call** is fixed once people are on the campaign: "People are on this campaign already, so it keeps calling from here. Start a new campaign to call people from somewhere else." On a CRM site, a segment's **Start a campaign** button creates a CRM campaign and lands you on People with that segment already chosen.

2.2 Limits and meetings

Why you need it. Limits stop anyone being called over and over, and the meeting type lets agents book a meeting while they are still on the phone.

Setting	What it does
Limit how many times one person is contacted → Max Attempts Per Person	1 to 1,000,000. "Counted across every stage, so somebody cannot be rung a dozen times by moving between stages. Each stage also has its own limit." Reaching it ends the person's run as lost. Switched off, there is no overall limit.
Leave a gap between attempts on the same person → Minimum Hours Between Attempts	1, 2, 4, 8, 24, 48, 72 or 168 hours. The gap is shared across campaigns: if the same person is on two campaigns, the longest gap wins.
Release overdue callbacks to any agent → Minutes past the promised time	1 to 10,080 minutes. A promised callback waits for its own agent; once it is this late — or straight away if that agent has left the campaign — any agent on the campaign can be served it.
Meeting Type	The meeting type agents book from a call, and the one the <code>{booking_link}</code> placeholder points at in campaign emails and texts. Meeting types come from the online meeting scheduler, which sites with the Commerce Connection CRM have; on other sites the only choice is "No meeting booking from this campaign". Choose that to turn booking off. Personal booking links are not offered.
Skip company holidays	Uses the online meeting scheduler's company-wide holidays, so the two never disagree about a closed day. On a site without the scheduler there is no holiday list, and the campaign calls on every day its calling hours allow.

Exceptions to the gap

- A callback agreed with the person, or scheduled by a manager, may happen sooner than the gap.
- A rule's own shorter wait (for example "No answer - try again in 2 hours") may happen sooner than the gap.
- Messages an agent sends during a live call go immediately.
- A recent attempt on *another* campaign still holds the person back in every case.

Good to know. Sent emails and texts count as attempts for the gap. Other settings live elsewhere: exclusive campaigns and nightly top-up on **People > Add people** (chapter 4), recipient-local hours on **Calling hours**, alert timing on **Results > Alert settings**, and territory, skill and language routing on **Agents** (CRM campaigns).

2.3 Calling hours and holidays

What it is. The weekly windows when the campaign may call and send. "Switch a day off and the campaign never calls on it. Nothing is served to an agent outside these hours. Automatic follow-ups move into the next open window; an exact callback must fall within an open window."

Steps

- 1 Open the campaign and choose **Setup ▾ > Calling hours**.
- 2 Check the top line, "All times are {timezone}". This is the site setting **Call campaign time zone**, or the server's time zone when that setting is blank.
- 3 Switch each day on or off. A day switched on shows 9:00 AM-5:00 PM until you change it.
- 4 Set the **from** and **to** times for each day that is on.
- 5 Optionally click **Copy Monday to all weekdays** to copy Monday to Tuesday-Friday.
- 6 Open **Preview effect on scheduled calls** to see how many open people and promised callbacks fall outside the new hours.
- 7 Click **Save**, or **Save & continue** to return to the Overview.

Good to know.

- Each day has one window. The page shows "Next campaign-hours window: {date and time}".
- Saving does not move anyone's existing due time. To move queued calls, use **Reschedule queued calls** on People (section 5.5).
- Clearing every window stops the campaign: "Calling hours cleared - this campaign will not call anybody until some are set."
- **Holidays** are not edited here. Switch on **Skip company holidays** on Settings, and the campaign closes on every company-wide holiday in the online meeting scheduler, including multi-day closures. Team holidays are not used. Without the scheduler (sites without the Commerce Connection CRM) there are no holidays to skip.

2.4 Recipient-local hours

What it is. A second window, in the *recipient's* own timezone. **Why you need it.** If your office is in Chicago and you call a prospect in Los Angeles at 9:00 AM your time, it is 7:00 AM for them. Recipient-local hours stop that.

Steps

- 1 On **Calling hours**, switch on **Also respect recipient-local hours**.
- 2 Set **Recipient's local time** from and to (9:00 AM-5:00 PM by default).
- 3 Switch on the days recipients may be called (Monday-Friday by default).
- 4 Click **Save**.

Good to know. When it is on, calls and campaign messages need both the campaign hours and this window in the recipient's saved timezone. It applies to agent calls, automated sends, an agent's quick-send and callback times.

"When no timezone is saved, the database timezone is used automatically" — screens show that as "(database default)". Set a person's timezone in bulk with **Set recipient timezone** on People, with a **Timezone** column when you add people from a spreadsheet to a call list (section 4.8), or, on CRM campaigns, with a company's **Recipient Timezone** field (section 8.4).

2.5 Agents and campaign managers

What it is. The **Agents** page lists all active staff accounts. You switch on the ones who will take calls. "Enabled agents share the unassigned call queue. Ready agents take one eligible call at a time; Busy is automatic during a call. Explicit contact assignments and callbacks are reserved for their agent."

Steps

- 1 Open **Setup ▾ > Agents**.
- 2 Use **Find staff** (name or email) to find a person, or switch on **Assigned only** to see just the people already on the campaign.
- 3 Switch on each agent who will take calls. The count "{n} assigned" updates as you go.
- 4 Switch on **Campaign manager** for anyone who should be able to change this campaign's setup and people.
- 5 Optionally switch on **Set a daily call target** and enter **calls a day** (1 to 1,000,000; 20 is suggested).
- 6 Click **Save & continue**.

Good to know.

- A daily target is a planning figure, not a limit. Agents see progress against it on My Call Queue (and on My Desk on CRM sites).
- To be served calls, an agent also needs the **Sales User** or **Call Center Outbound Agent** seat on their Business Phone extension (section 1.3).
- Switching an agent off keeps their history. Everyone assigned to them goes back to the shared pool and their promised callbacks are released to the pool.
- With nobody switched on you see "Nobody is assigned to this campaign, so no calls will be served."

2.6 Territory routing

What it is. A way to keep each agent on their own patch. **Why you need it.** Regional teams or account owners who should speak to "their" companies. Territories come with the people a campaign calls from the Commerce Connection CRM; call lists and Customers have none, so for those campaigns the page says "The people this campaign calls come with no territories, so everyone is served to anyone."

Steps

- 1 On **Agents**, open the **Routing** panel and switch on **Route by territory**.
- 2 In each agent's **Territories** box, choose the territories they cover (leave it at "Any territory" for agents who cover everyone).

- 3 Click **Save & continue**.

Good to know. "When on, an agent with territories is served only people whose company is in one of them. People with no territory, or in a territory no agent here covers, are served to anyone, and an agent with no territories serves anyone. People assigned to an agent stay with that agent." Territories come from the CRM's **Territories** option list (**Settings > Contact Options** on the CRM) and are kept if you switch routing off. Each agent can have up to 200.

2.7 Skill and language matching

What it is. A way to make sure a company is only called by an agent with the right skills and language. **Why you need it.** Technical products that need a trained caller, or customers who prefer Spanish. Skills and languages are kept on CRM companies, so matching works for campaigns that call from the Commerce Connection CRM; for other campaigns the skill and language lists are empty.

Steps

- 1 On the CRM, open **Settings > Contact Options**. In the **Call Skills** and **Call Languages** boxes, enter one option per line as `key = Label` (for example `spanish = Spanish`), then click **Save Contact Options**. Both lists start empty.
- 2 On each company that needs it, set **Required call skills** and **Preferred call language** on its edit page (section 8.4).
- 3 On the campaign's **Agents** page, set each agent's **Call skills** and **Spoken languages**.
- 4 In the **Skill and language matching** panel, switch on **Require matching call skills**, **Require matching language**, or both.
- 5 Click **Save & continue**.

Good to know.

- An agent must have every required skill and speak the selected language.
- A company with no requirements can be called by any agent. An agent with no skills or languages recorded qualifies only for companies with no requirements.
- Assignments, released callbacks and hand-offs follow these rules too.
- The page warns you when people are left without a qualified agent: "{n} open call(s) have no eligible assigned or matching agent. Add capabilities, assign a qualified agent, or correct the company requirements."
- Saving with the switches off keeps each agent's capability lists.

2.8 Messages

What it is. "Messages are the emails and texts agents send from a call and automated stages send on their own." A message can be **Only this campaign** or **Shared with every campaign**. A message that is **Attached** to a campaign appears in the agents' quick-send on the call card.

Steps to create and attach a message

- 1 Open **Setup** ▾ > **Messages**.
- 2 In **Create message**, enter a **Name** (for example "Product brochure").
- 3 Choose **Availability**: Only this campaign, or Shared with every campaign.
- 4 Choose the **Channel**: Email or SMS.
- 5 For email, enter the **Email subject**.
- 6 Write the **Message**. Personalize it with the merge fields listed below.
- 7 For email, optionally add **Email attachments**.
- 8 Click **Save and attach**.

Merge fields and limits

Item	Detail
Merge fields	{first_name} , {full_name} , {company} , {campaign} , {phone} , {email} , {booking_link}
Length	Name 255; email subject 500; email 20,000 characters; SMS 1,600 characters (long texts may use several SMS segments)
Attachments	Email only: PDF, PNG, JPG, DOCX or XLSX, up to 10 MB each. For SMS, put a brochure link in the text instead.

Good to know.

- Use **Attach to this campaign / Detach from this campaign** on the left to control quick-send. Detaching "Removed from agent quick-send. Existing stage rules are unchanged."
- Availability and channel cannot change after saving; create a separate message instead.
- "Editing a message shared with every campaign updates it for all attached campaigns. Messages already queued keep their saved content." Only people with the "See and manage every call campaign" permission can edit a shared message; they can also open **Messages** from the campaign list's Actions menu.
- Campaign-only messages are left out when a campaign is copied or saved as a template.
- There is no delete or disable control on this page.
- Emails and texts need a messaging system on the site. Today that is the Customer Inbox, which sites with the Commerce Connection CRM have: it needs an enabled email inbox and an enabled text inbox, and replies come back to it. On a site without one, saving a message says "Campaign emails and texts need a messaging system on this website.", and campaigns are call-only.

2.9 Start from a template or copy a campaign

What it is. Two shortcuts so you never build the same campaign twice. **Templates** are saved snapshots of a campaign's structure; **Copy to a new campaign** duplicates one campaign. Templates need the "See and manage every call campaign" permission; without it you see "Managing templates and comparing campaigns requires Manage All Campaigns permission."

Start from a starter

- 1 On the campaign list, open **Actions > Templates**.
- 2 Under **Start from a proven structure**, choose a **Starter**: "Prospect introduction", "Customer reactivation" or "Renewal / follow-up".
- 3 Enter a **Campaign name** and click **Create starter draft**.
- 4 Follow the setup checklist on the new draft's Overview.

A starter draft has an attempt limit of 3, a 24-hour gap, holidays skipped, Monday-Friday 9-5 hours, and one call stage, "Initial conversation" (limit 3, then lost), with starter rules.

Save a campaign as a template

- 1 On **Templates**, under **Save a campaign as a template**, choose the **Source campaign**.
- 2 Enter a **Template name**, optional **Tags** and a **Description**.
- 3 Click **Save template**. Later changes to the source campaign do not change the snapshot.

Create a campaign from a template

- 1 On the template's card, optionally use **Preview stages and scripts**.
- 2 Enter a **New campaign name** and click **Create draft from template**.
- 3 Assign agents, add people and check readiness before starting.

What is carried over

	Template	Copy to a new campaign
Settings, calling hours, stages, scripts, rules	Yes	Yes
Shared messages	Yes (stay linked)	Yes
Agents (with manager flag, target, territories, skills, languages)	No	Yes
People, history, dates, source segment and top-up	No	No
Campaign-only messages	No	No

Good to know. **Copy to a new campaign** is on the Overview under Campaign actions; the copy is named "{name} (copy)" and starts as a Draft. A template card also offers **Compare with previous revision** and **Archive template**; archiving takes it out of the library but campaigns already made from it keep their settings.

3. Stages and Rules

Stages and rules are the heart of a campaign: they decide what each person experiences. Open them from **Setup ▾ > Stages & rules**. The page heading, "Campaign sequence", says it simply: "Start with a call, email or text. Add rules to decide what happens after each outcome."

3.1 How stages and rules work

"People enter the first stage. Rules run from top to bottom; the first matching rule wins. Without a matching rule, the person stays on this stage and is tried again, subject to campaign limits."

- Each stage shows a card. Its summary line reads, for example, "Call · at most 3 attempts, then move to the next stage · 12 here now · 4 rules".
- Cards start collapsed. Use **Expand all** / **Collapse all**, or search with **Find a stage or channel**.
- A campaign with no stages shows "No stages yet" and suggests: "Most campaigns start with an initial call and one or two follow-ups."
- Outcomes that end a person's run — won, lost and do not call — always take effect first.

Good to know. New stages and new rules are added to the end, and there is no control to drag them into a different order. Plan the order before you build, and add your most specific rules first. Use **Duplicate** (under **More** on a stage card) to copy a stage and its rules to the end as "{name} (copy)".

3.2 Add a call stage

What it is. A step in which an agent phones the person. **Why you need it.** Every campaign that makes calls needs at least one; most have an initial call and one or two follow-ups.

Steps

- 1 On Stages & rules, click **Add a stage** (or **Add the first stage**).
- 2 Enter a **Stage name**, for example "Initial call" (up to 128 characters).
- 3 Leave **Type** on **Call — An agent calls**.
- 4 In **Call script**, write "What the agent should say." It is shown on the call card (up to 20,000 characters).
- 5 Click **Save stage**. You see 'Stage "{name}" saved.'
- 6 Click **Add missing starter rules** on the new card (section 3.8), then review the rules it adds.

Good to know. The stage editor opens in a simple view. Everything else — attempt limits, objections, reusable guidance, revisions and previews — is under **Advanced**, which opens by itself when the stage already uses one of those settings or when a field inside it needs fixing. Closing the editor with unsaved changes asks whether to **Keep editing** or **Discard changes**.

3.3 Stage attempt limits

What it is. A cap on how many times one stage is tried, and what happens next. **Why you need it.** "Without a limit, a rule that says "try again" can call somebody indefinitely."

Steps

- 1 Open the stage with **Edit stage** and expand **Advanced**.
- 2 Under **Attempt limit**, switch on **Limit how many times this stage is tried**.
- 3 Enter **Attempts** (1 to 99; 3 is suggested).
- 4 Choose what happens **Then** (table below).
- 5 Click **Save stage**.

The Then choices

Choice	Effect
Move to next stage; end as lost if last	The person moves on; on the last stage their run ends as lost.
Move to a specific stage	Choose the stage in Move them to . It cannot be the same stage.
End their run as lost	The person is finished as lost.
Leave them where they are, not due	The person stays on the stage but is no longer served.

Good to know. The stage limit only kicks in when the outcome would keep the person on this stage. The campaign-wide **Max Attempts Per Person** still applies on top, across every stage.

3.4 Objections, reusable guidance and revisions

What it is. Help for agents when the conversation goes off script. **Why you need it.** New agents handle "we already have a supplier" better when the suggested answer is in front of them.

Add objections and rebuttals to a call stage

- 1 Edit the call stage and expand **Advanced**.
- 2 Under **Objections / Rebuttals**, switch on **Show objections and rebuttals to agents**.
- 3 Click **Add objection** and fill in **Objection** (up to 2,000 characters) and **Rebuttal** (up to 10,000).
- 4 To add many at once, use **Paste multiple objection / rebuttal pairs**: two tab-separated columns copied from a spreadsheet, up to 100 pairs.
- 5 Use **Move up / Move down** to order them, and **Remove pair** to delete one.
- 6 Click **Save stage**.

Agents see an **Objections / Rebuttals** panel on the call card with a search box. Switching the section off keeps your text.

The reusable library

At the bottom of Stages & rules, **Reusable scripts and objection / rebuttal pairs** holds writing shared by every campaign. Add an entry with a **Title**, an optional **Objection** and a **Rebuttal or script snippet**, then **Save to library**. In a call stage's **Advanced > Reusable guidance**, search the library and use **Insert into script** or **Insert objection / rebuttal**. The stage gets a copy: "Editing a stage never changes the library." Editing a library entry needs the "See and manage every call campaign" permission, and entries cannot be deleted.

Previous revisions and script view

- Each save that changes the script or objections records a revision. **Previous revisions** lets you pick one and compare it with your draft. "Comparison never replaces your draft"; to bring old text back, copy it across by hand.
- **Preview as agent** shows the script and objections as the agent will read them. **Expand writing area** gives you a larger editor; **Restore stage settings** returns to the normal view.

3.5 Email and SMS stages

What it is. A stage that sends an email or text by itself: "Sent automatically by the campaign, inside its calling hours. No agent sees this stage." **Why you need it.** Send a brochure after a good call, or a reminder text before the next attempt, without anyone having to remember. Email and SMS stages need the site's messaging system (section 2.8); on a site without one, campaigns use call stages only.

Steps

- 1 Click **Add a stage**, enter a **Stage name** and choose **Email — Send automatically** or **SMS — Send automatically**.
- 2 Under **Message source**, choose **Use an existing message** and pick it in **Message to send**, or choose **Write a campaign-only message**.
- 3 For a new message, fill in **Template name**, **Email subject** (email) and **Message**. Use **Insert a merge field** to personalize it.
- 4 Check the sender line. It must say the sender is configured, not "Configure an EMAIL/SMS inbox before starting."
- 5 Click **Save stage**. A new message is saved for this campaign only.
- 6 Add a rule for **Message accepted for sending** (or use **Add missing starter rules**). An automated stage cannot start without one.

Preview and send a test

- 1 In **Advanced > Recipient preview and test**, leave **Preview recipient** on the sample person or type two or more letters to pick someone on the campaign.
- 2 Click **Preview message** to see the merged result.
- 3 Enter a **Test destination (your email or phone)** and click **Send test message**, then confirm.
- 4 Check your inbox or phone. The subject starts "[Campaign test]" (texts start "[Test]").

Good to know.

- The SMS counter shows characters out of 1,600, whether the text uses GSM-7 or Unicode, and how many SMS segments it needs before merge fields are filled in.

- You can send one test per page load; reload the page to send another. "No campaign member advances" from a test, and the test is noted in the campaign's change log.
- A test to a number or address on the do-not-call list is refused: "This test destination is suppressed."
- The **Message to send** list includes this campaign's own messages, marked "(campaign only)". It must be an enabled message of the stage's channel, with content.
- Use **Refresh templates** after creating a message elsewhere, and **Manage sender inboxes** to set up the Customer Inbox sender.

3.6 Add a rule

What it is. A rule says what happens next for one or more outcomes on one stage.

Steps

- 1 On the stage card, click **Add a rule**.
- 2 Under **1. Choose outcomes**, pick one or more outcomes in **When any of these outcomes occurs**. Call stages list call outcomes; email and SMS stages list message outcomes.
- 3 Under **2. Decide what happens next**, choose **Then** (table below).
- 4 For a move, choose **Which stage** (the next stage in the list unless you pick another).
- 5 For a move, a retry or a callback, choose **When**: straight away, after a number of hours or days (1 to 3,650), or next working day.
- 6 Optionally open **Additional actions** (table below).
- 7 Click **Save rule**. You see "Rule saved."

The Then choices

Choice	What happens to the person
Move to the next stage	Moves to the chosen stage after the delay.
Try this stage again	Stays on this stage and is tried again after the delay.
Keep them here and call back later	Stays here; the call card then requires the agent to set a callback time.
Stop - won / Stop - lost	Their run ends as won or lost.
Stop - do not call again	Their run ends and they are not contacted again.
Hand to another agent	Returns them to the shared pool so any agent can take them.

Additional actions

Action	What it does
Send an email / Send a text	Queues the chosen message. Nothing is sent on a do-not-call stop.
Create a follow-up task	Creates a task "Follow up: {person}". CRM campaigns only.
Tell the campaign manager	Notifies every active campaign manager on the campaign, with a link to the person's History. CRM campaigns only.
Prompt to book a meeting	The call card asks the agent to book a meeting before saving. Needs a meeting type (section 2.2).

Good to know. "A time outside the campaign's calling hours is moved forward to the next time somebody could answer." If another rule already handles an outcome you pick, you are warned: "The earlier rule wins; remove the overlapping outcome or change the existing rule." Moving someone to the stage they are already on is refused — choose **Try this stage again**.

3.7 Outcomes

What it is. "These are the answers an agent picks at the end of a call, shared by every campaign so the numbers can be compared between them." Each outcome **Counts as** one of four groups, and Results are built on them.

Built-in outcomes

Counts as	Outcomes
Won	"Became a customer"
Reached them	"Meeting booked", "Interested - follow up", "Asked to be called back"
Lost	"Not interested", "Do not call again", "Wrong number", "Number disconnected"
Did not reach them	"No answer", "Voicemail - message left", "Voicemail - no message", "Line busy", "Blocked by gatekeeper"
Message outcomes (email and SMS stages)	"Message accepted for sending", "Message send failed", "Reply received"

Outcomes that need a rule

On a call stage, an agent cannot save these outcomes until the stage has a rule for them: Won and Lost outcomes, "Asked to be called back", "Meeting booked" and "Wrong number". "Do not call again" never needs a rule — it always works. Other outcomes without a rule simply retry the stage within the limits.

Manage outcomes

People with the "See and manage every call campaign" permission can open **Actions > Call Outcomes** on the campaign list.

- 1 Click **Add Outcome**, or open an existing one.

- 2 Set **What the agent sees** and **Counts as**.
- 3 On sites with the CRM, optionally choose **Sets pipeline status to** (default "No change"). This is the CRM pipeline status, not a campaign stage, and it applies only on CRM campaigns.
- 4 Optionally switch on **Marks the company do not contact** (CRM campaigns; on call lists "Do not call again" marks the person) and **Remove related contacts from the campaign** (other contacts at the same company are removed from that campaign, each removal logged).
- 5 Leave **Offer this to agents** on, or switch it off to retire the outcome.
- 6 Save.

Good to know. Built-in outcomes cannot be deleted: "Built in - switch it off instead of deleting it". Neither can an outcome already used by a rule or a logged call. The edit panel shows how many campaigns and rules use the outcome. The grid can be exported to Excel from **Actions > Export**.

3.8 Starter rules

What it is. Add missing starter rules on a stage card adds one sensible rule for every outcome that does not have one yet. **Why you need it.** It is the fastest way to a stage that can start, and it never rewrites rules you already saved.

What it adds

Outcome	Starter rule
Won outcomes	Stop - won
Lost outcomes	Stop - lost
"Do not call again"	Stop - do not call again
"Asked to be called back", "Interested - follow up", "Meeting booked"	Keep them here and call back later
Everything else on a call stage	Try this stage again in 1 day
Email/SMS: "Message accepted for sending"	Move to the next stage
Email/SMS: other message outcomes, including "Reply received"	Stop - lost

You see "N starter rules added. Review them before activating."

3.9 Setup notes

Stage cards, the diagram and the Overview check your stages and rules as you build. A card shows "{n} setup notes to review" when something needs a look. **Errors** stop the campaign starting; **warnings** do not.

Errors (must fix)

Note	Fix
"This rule has no outcomes, so it can never fire."	Edit the rule and choose outcomes, or delete it.
"This rule moves people to a stage that no longer exists."	Point the rule at another stage.
"This stage sends its message again straight away, and neither the stage nor the campaign has an attempt limit, so people would be messaged without end."	Add a delay of at least an hour, or switch on an attempt limit.
"{stage}: missing outcome rules for {labels}."	Click Add missing starter rules and review.
"This stage has no configured exit."	Add a rule that moves people on or finishes them.

Warnings (worth checking)

- "An earlier rule already handles N of these outcomes, so this rule never runs for them."
- "This stage can send people round again but has no attempt limit, so they could be contacted indefinitely."
- "N outcomes have no rule here. Ordinary call outcomes retry; critical outcomes require routing before they can be saved."
- "Nothing leads to this stage, so nobody will ever reach it."

3.10 Test an outcome

What it is. A simulator that shows "where a person would go, without calling anyone." **Why you need it.** Prove your rules before real people go through them.

Steps

- 1 On Stages & rules, open **Test an outcome**.
- 2 Choose a **Stage** and an **Outcome**.
- 3 Enter **Attempts already made on this stage** and **Attempts already made in total**.
- 4 Click **Test**.

The result shows the action, the target stage, the delay, any extra actions and the reason — for example "No rule covers that outcome, so they stay on this stage." or "They have reached the campaign limit of 5 attempts." "Calling hours, attempt limits and the do-not-call list still apply when this runs for real."

3.11 The diagram

What it is. Click **See it as a diagram** to see every stage, every rule as an arrow, and the three endings: **Won**, **Lost** and **Do not call**. **Show** switches between **People and traffic** and **The rules only**.

Re-point a rule on the diagram

- 1 Drag the end of a rule's arrow to a different stage, or pick a new **Destination**.

2 Click **Save changes** (or **Discard**). You see "1 rule updated."

Re-pointing is the only edit the diagram makes. **Save as image** downloads it as a picture, **Expand workspace** gives it more room, and **See it as a list** goes back to the stage cards. Agents can open the diagram too, read-only.

4. Choosing Who to Call

Everything about who is on a campaign lives on the **People** tab. People come from the campaign's contact source. You can build an audience from filters or a saved list, add people from a spreadsheet, top up from a list, and see exactly why someone was left out.

4.1 Where people come from: contact sources

What it is. Every campaign calls people from one **contact source**, chosen in **Who to call** on the campaign's Settings (section 2.1). The source supplies each person's name, company, numbers, email and timezone, and receives the result of every call. **Why you need it.** A store calls its own customers, a sales team calls prospects in the CRM, and anyone can upload a spreadsheet and start calling the same day — without retyping anyone.

Source (as shown in Who to call)	Who it calls	What it can do
Call lists — built into Business Phone, always available	People you upload from a spreadsheet (section 4.8). Each upload adds them to the campaign's call list.	Add and update people from a spreadsheet; agents can correct a person's email and phone on the call card; each result is saved on the person as their last result, and "Do not call again" marks them do not contact. No filters, saved lists or pipeline stages.
Customers — your store's customers	Live customers (test customers are left out). Start from a list offers your active Customer Lists, worked out live. The mobile number is called first, then the phone number.	Each result is saved as a customer note titled "Call campaign: <outcome>", and the person's name links to their customer record. People are added with Add people only, not from a spreadsheet, and contact details are not edited from the call card.
CRM customers and prospects — the Commerce Connection CRM, on sites that have it	One person per active contact at a company, or the company itself when it has no contact. Start from a CRM segment, or use the CRM's filters.	Everything: filters and Save as list , spreadsheets, contact edits, pipeline stage moves from outcomes, territory, skill and language routing, follow-up tasks and manager alerts from rules, and the full activity record (chapter 8).

Do not contact

- A person their source marks **do not contact**, or whose record is inactive, is never added — there is no switch to include them — and is never served a call or sent a message.
- Each person is read fresh from their source just before they are served and before every email or text, and open people are refreshed in the background every 15 minutes or so. A do-not-contact mark or a corrected number set in the source counts from then on.
- Customers have no do-not-contact flag of their own: put a customer who must not be called on the do-not-call list (section 4.11).

When a source is switched off or removed

The campaign keeps the copy of each person it last read. Calls are still served from that copy, results are not written back, and emails and texts are held until the source can be checked again. Settings shows the source as "<name> (not

installed)"; the rest of the campaign's settings still save. **Who to call** cannot be changed once people are on the campaign — start a new campaign to call people from somewhere else.

4.2 Add people from filters or a list

What it is. The **Add people** panel builds an audience, shows you a preview, and adds only the people you confirm.

Why you need it. You see every match — and every exclusion — before a single person lands in an agent's queue.

Steps

- 1 Open the campaign's **People** tab and click **Add people**.
- 2 In **Start from a list**, choose one of the source's lists (a Customer List, a CRM segment, or the campaign's call list), or leave it on **Everyone, narrowed by the filters below**.
- 3 Narrow the audience with **Search** (name, company, phone or email), **No campaign call since**, **Timezones**, and any filters the source offers (the CRM's are listed in section 8.2).
- 4 Set the eligibility switches (section 4.4).
- 5 Click **Preview audience** and review it (section 4.5).
- 6 Click **Add N people to campaign**.

Good to know.

- A chosen list defines who; the filters narrow it further.
- On CRM campaigns you can reuse your filters: under **Save current filters as**, enter a name and click **Save as list**. It is saved as a CRM segment, which stores filters, not a fixed list, so eligibility is re-checked every time you preview. The switches and the "No campaign call since" date are not saved. Other sources do not offer Save as list.
- **No campaign call since** "Leaves out people called on any campaign on or after this date."
- **Timezones** starts with the campaign time zone selected. "Someone with no saved timezone is called in" the server's time zone "and matches that timezone here." Clear the picker to include every timezone.
- A campaign that is running puts new people on its first stage at the next open hour. A draft holds them until you start it.

4.3 Leaving people out

Some people are always left out; others only when your filters and switches say so.

Who	What happens
Marked do not contact , or inactive, in their own record	Always left out, and counted in the preview's "Left out" line. There is no switch to include them.
On the do-not-call list (section 4.11)	Always left out, for calls, emails and texts in the list entry's scope.
Already on this campaign	Not added twice. People you removed earlier can be added again, and their earlier attempts and history come back with them.
Outside the chosen Timezones , or called on a campaign since the No campaign call since date	Left out by your filters.
On another running campaign, or without a usable phone	Left out unless you switch them on (section 4.4).

Good to know. To keep a group of people out of every campaign — current deals, for example — add them to the do-not-call list for **All campaigns**.

4.4 Eligibility switches and exclusive campaigns

All of these switches start off.

Switch	When to use it
Include people on another running campaign	Off: anyone already on a running campaign is left out, so two teams never chase the same person.
Include people without a usable phone (for email stages)	For campaigns that start with email.
One person per company	Calls one person per company: "the primary contact, else the first active contact, else the company itself".
Only add people who are on no other running campaign	Makes this campaign exclusive . It is saved as soon as you change it, and spreadsheet imports follow it too. While it is on, the overlap switch is disabled.
Add new matches every night	Shown when a list is chosen in Start from a list. See section 4.7.

Good to know. Each active contact counts as one person; a company without an active contact counts as one.

4.5 Preview and confirm

The preview, headed **Review the audience**, shows everyone who matches and whether each can be added. It covers up to 50,000 people and expires after 15 minutes.

Reading the preview

- The counts line reads "<total> matches · <eligible> eligible · <already> already enrolled · <suppressed> suppressed · <overlap> on other campaigns · <no phone> without usable phones". It may add how many have no timezone, share a phone or an email, or have an email that needs correcting. Shared details are warnings, not blocks.
- The left-out line counts people dropped before the preview: "Left out: N marked do not contact · N inactive · N outside the chosen timezones."
- The grid shows each person's company, contact, phone, email, timezone and eligibility, with the extra details the source has (on CRM campaigns: pipeline status, owner, industry, territory, last contact and priority). Every column sorts and filters.
- The **Eligibility** column says "Eligible" or "Excluded: ..." with the reason: "Already enrolled", "Do Not Call", "On another running campaign" or "No usable phone".

Confirming

- 1 Click **Select all N eligible people**, or tick individuals across pages.
- 2 Optionally click **Export preview** for a spreadsheet with the priority and reasons.
- 3 Click **Add N people to campaign**.

Eligibility is checked again when you confirm: "N people added. M skipped because their eligibility changed."

Good to know. More than 50,000 matches: "Filter this audience into smaller groups before adding them." An expired preview must be run again. A running campaign must have a stage before you can add people.

4.6 Why isn't someone here?

What it is. A check that tells you why one person or company is not in your preview. **Why you need it.** When a sales rep asks "why isn't Acme on my list?", you get the answer in one click.

Steps

- 1 Set up the filters in **Add people**.
- 2 Under **Why isn't someone here?**, type a **Company name or phone number** (2 to 100 characters).
- 3 Click **Check**.

It checks up to 10 matches in the campaign's contact source and gives the first thing that leaves each one out, or says it "Would be included."

Reasons you may see

Reason	What to do
"Marked do not contact in their own record."	Respect it. If the mark is wrong, correct it where the person is kept (the call list, or the CRM record).
"An inactive record in their own system."	Reactivate the record where it is kept, if it should be called.
"Not in the chosen list, or does not match the filters on this panel." / "Does not match the filters on this panel."	Change the list or the filters. On CRM campaigns the answer names the exact filter, for example 'Does not match "City: Boston".'
"Outside the chosen timezones (their timezone is X)."	Add that timezone, or correct the person's timezone.
"Not in the chosen list or filters, or called on a campaign since the date chosen."	Change the list, the filters or the No campaign call since date.
"Already on this campaign." / "On the do-not-call list."	Nothing to add.
"On another running campaign - ..."	Switch on Include people on another running campaign, if appropriate.
'No usable phone number - switch on "Include people without a usable phone" for email stages.'	Add a phone number, or use the switch for email-only campaigns.

4.7 Topping up from a list

What it is. When you add people from a list (a Customer List, a CRM segment or a call list), the campaign remembers that list and the switches you used. Later you can add anyone new who now matches. **Why you need it.** New customers or prospects added this week get called without anyone rebuilding the audience.

Top up by hand

- 1 On the campaign's **Overview**, find "People from: {list}" in the Setup summary.
- 2 Click **Top up from segment** and confirm.
- 3 Read the result: 'Topped up from "<list>". N people added.'

Top up every night

- 1 In **Add people**, choose the list in **Start from a list**.
- 2 Switch on **Add new matches every night**.
- 3 Add people from that list as usual. Nightly top-up starts from then on.

Good to know. Nightly top-up runs once a day, on the first scheduled campaign run after midnight in the campaign time zone, for campaigns that are Running. It uses the list's own definition and your one-person-per-company, phone and overlap choices; extra filters you added on screen are not used. Do-not-contact marks, the do-not-call list, other running campaigns and phone checks still apply. The Overview tells you which mode is on: "New matches are added every night.", "...while the campaign is running." or "...only when you top up." Topping up refuses a list that no longer exists or cannot be read (for a CRM segment that has been deleted, retired or broken, repair it on the CRM's Segments screen first).

4.8 Add people from a spreadsheet

What it is. Upload a spreadsheet; each row is matched to someone where the campaign's people come from and added to the campaign. On a call list campaign, rows not on the list yet are added to it; on a CRM campaign, companies not on file can be created as prospects. **Why you need it.** Trade-show lists and purchased lists go straight into a campaign. Customers campaigns cannot add people from a spreadsheet: "People cannot be added from a spreadsheet for where this campaign calls from. Use Add people instead."

Steps

- 1 In **Add people**, click the **add people from a spreadsheet** link.
- 2 Drag a CSV or Excel file onto the box, or click to browse, then **Upload File**. Only the first sheet is read.
- 3 Map each column to a field, or choose **Do Not Import**. **SET VALUE** puts the same value on every row.
- 4 Optionally **Save This Mapping** as a **Saved Template** for next time, and use **Preview spreadsheet rows** to check the first five rows.
- 5 Leave **Create The Ones That Are Not On File** on to add rows that are not there yet (call list people, or CRM prospects), or switch it off to add only people already on file.
- 6 Click **Add These People**.

The result reads "Added: N, Already on the campaign: N, Not added: N", plus prospects and contacts created. **Download Rows Not Added (Excel)** lists the rest with a reason: "No match value", "Repeated in the uploaded file", "Matches more than one record", "Not on file", "Not eligible", "On another running campaign", "Marked do not contact" or "Inactive record".

Call list spreadsheets

Item	Detail
Columns	Name, Company, Phone, Email, Timezone (a zone name such as America/Chicago) and Notes. Common heading names are recognized.
A usable row	A name or a company, plus a phone number or an email.
Matching	On Email, then Phone. A number already on the list is the same person. Numbers are compared in one form: a 10-digit number is North American (+1); +, 00 or 011 starts a country code; extensions and tel: prefixes are ignored.
Where new rows go	The campaign's call list, or a new list named "Added to <campaign> MM/DD/YYYY".
Rows not added	"Not on the call list" (switch on Create The Ones That Are Not On File) or "Cannot be added" with the reason.

Good to know. Up to 50,000 rows per file. Eligibility is the same as the Add people panel, including exclusive campaigns. On CRM campaigns, a row that names only a company adds its primary contact, else its first active contact. Rows that match an existing record are never edited here — use Import updates. The uploaded file is kept for 24 hours between steps; after that, upload it again.

4.9 Update people from a spreadsheet

What it is. **Import updates** changes the details of people already on the campaign — where they are kept (call lists and the CRM) and their follow-up on the campaign. "Nobody is added to or removed from the campaign." **Why you need it.** Bring back results from an outside call team, or fix timezones and owners in bulk.

Steps

- 1 On **People**, click **Import updates** and upload the file.
- 2 Under **Match Rows On**, choose which fields identify each person. The source decides what is offered: Email, then Phone for call lists; Company Email, Company Phone and Company Name, tried in that order, for the CRM.
- 3 Map the columns. The **Campaign** group offers Owner, Stage, Next Action, Last Outcome, Call Notes, Recipient Timezone and Callback.
- 4 Decide on **Send The Emails And Texts These Outcomes Trigger** (off by default).
- 5 Click **Apply Import**.

How values are read

Column	Effect
Any blank cell	Leaves the value alone.
Last Outcome	Runs the stage's rules as if an agent had logged it. "Do not call again" always adds the person to the do-not-call list, even with sending off.
Call Notes alone	Records an attempt.
Recipient Timezone	A zone name such as America/Chicago, or a short code such as CST.
Callback	YYYY-MM-DD HH:MM or MM/DD/YYYY HH:MM; a date with no time means 9:00 AM.
Tags (CRM)	Only added, never removed.

The result reads "Updated: N, Already up to date: N, Not applied: N". A row that matches several people is reported rather than guessed at, and nothing on a rejected row is written. Fix those rows and import them again; **Download Rows Not Applied (Excel)** gives you the list.

4.10 Import history and undo

What it is. **Import history** on People lists "What every spreadsheet run against this campaign changed, and how to put it back."

Undo an import

- 1 On **People**, click **Import history**.
- 2 Click **Open** on the run. The page lists each change with what it Was and what it Became.
- 3 Click **Undo this import** and confirm.

- 4 Read the result: "Import #N undone: N changes put back", with any that were left alone.

Good to know. Anything edited by hand since, a person who has been called, or someone the import created who is now on a campaign is left exactly as it is and named in the report. People on a live call are left alone. Each change is undone separately, so one problem does not stop the rest. An import can be undone only once. The history shows the newest 50 runs, and each run page shows up to 500 changes.

4.11 The do-not-call list

What it is. "A do-not-call entry blocks calls, email and SMS in the chosen scope." **Why you need it.** Honoring a request not to be contacted is a legal and reputational must. The list is checked before every call is served and before every message is sent, including test sends.

Add someone

- 1 On the campaign list, open **Actions > Do-not-call list**, then click **Add Someone**.
- 2 Find the person with **Find a customer, prospect or contact** (it searches every contact source on your site), or enter a **Phone** or **Email**.
- 3 Choose **Applies to**: All campaigns, or one campaign.
- 4 Enter a **Reason**, for example "Asked not to be called again".
- 5 Click **Preview affected people** to see how many open campaign members will be stopped.
- 6 Click **Add to do-not-call list**.

Good to know.

- Matching open people are stopped in that scope; their history is kept.
- Use + and the country code for international numbers; local numbers use +1.
- Agents add people straight from the call card with the "Do not call again" outcome. That entry applies to all campaigns.
- **Remove from the list** does not put anyone back on a campaign automatically.
- There is no import. The grid can be exported to Excel. Older entries may ask you to **Confirm country codes**.
- The list is separate from a source's own do-not-contact mark (a CRM company's **Do not contact** flag, or a call-list person an agent marked "Do not call again"), which keeps them out of every campaign that calls from that source.
- If the list cannot be read, nothing is served or sent: "The do-not-call list could not be checked, so no call has been served..."
- The screen needs the "See and manage every call campaign" permission.

5. Running the Campaign

5.1 The Overview checklist

What it is. While a campaign is a draft or paused, its Overview shows **Finish campaign setup** (or **Campaign readiness** when paused) with four items: **Stages and rules**, **Calling hours**, **Agents** and **People**. Each is ticked when it passes.

Steps

- 1 Open the campaign's **Overview**.
- 2 If something is missing, click **Next: {item}**, or use the **Fix this** link beside each blocker under "Needs attention before it can start".
- 3 Optionally open "{n} things worth checking (they do not stop the campaign)" and **Review** each warning.
- 4 When the checklist is complete, click **Start calling** (or **Resume calling**).

Blockers and where Fix this goes

Blocker	Fix this opens
"Add at least one stage." and stage or rule errors	Stages & rules
"Set calling hours."	Calling hours
"Assign an active agent."	Agents
"Add campaign members."	People
"{stage}: choose a meeting type for the booking prompt."	Settings
"{stage}: configure a {email sms} inbox."	Inbox setup. Email and SMS stages need the site's messaging system (section 2.8); without one, use call stages only.
"{stage}: select an enabled message for this campaign and channel with content."	Stages & rules
"{stage}: add a rule for Message accepted for sending."	Stages & rules

Tip. "Setup is complete. Test how an outcome would route on Stages & rules first if you want to be sure." See section 3.10.

5.2 Start, pause, resume and complete

Action	Where	What happens
Start calling	Overview checklist	Readiness is checked again. People added while it was a draft go onto the first stage. A blank start date becomes today. You see "Campaign is now running."
Pause	Overview > Campaign actions	People keep their place. Nothing is served or sent until it runs again.
Resume calling	Overview checklist	Readiness is checked again, then calling resumes.
Mark completed	Overview > Campaign actions	Records the actual end date; people are left as they are.

Automatic start and finish

- A draft with a start date starts by itself on that date if it has stages, people and no blockers. The change log notes "Started automatically on its start date." If something blocks it, the pill shows **Start missed** and an alert is raised.
- A running campaign completes by itself once nobody is waiting or in progress and no message is unfinished: "Completed automatically - everyone has been through the campaign."
- The expected end date never stops a campaign.

Note. If a running campaign cannot work — for example its last agent was switched off — the Overview shows a red banner: "This campaign is running but cannot work: {blockers}".

5.3 Archive, delete and copy

Action	When it is offered	What happens
Archive	Any campaign that is not archived, on the list's Manage campaign menu and on the Overview	"This stops campaign processing and keeps its people and history." There is no un-archive button.
Delete / Delete campaign	Only while nothing has been worked: nobody has moved past queued, nobody has attempts or replies, no call is logged and no message has been queued	Permanently deletes the campaign's setup and membership. The people's own records (call lists, customers or CRM records) are kept. If activity appeared meanwhile, it is archived instead: "That campaign has call history, so it has been archived rather than deleted."
Copy to a new campaign	Always, on the Overview	"Copies the stages, rules, hours and agents into a new draft - not the people or the history." See section 2.9.

5.4 The People grid

What it is. Everyone on the campaign and where they stand. It opens showing open people only (Queued and In progress); clear the Status filter to see everyone.

Columns

Column	Meaning
Company / Contact	Opens the person's own record when their source has one (a customer or a CRM record). "No named contact" or "No phone number" flags gaps.
Stage / Status	Statuses: Queued, In progress, Won, Lost, Removed, Do not call.
Call type	Queued call, Promised callback or Automated stage.
Attempts	Attempts so far.
Next action	When they are next due, in the campaign's timezone. The grid is sorted soonest first.
Agent	Their assigned agent, or "Any agent" when they are in the shared pool.
Recipient timezone	Their timezone, or the database default when none is saved.
Actions	History and, for open people on a call stage, Schedule callback .

Good to know. **Save this view** stores your filters and columns under a name, for your account on this browser. **Columns** chooses which columns show. **Export** downloads all, filtered or selected people as a spreadsheet.

5.5 Bulk actions on people

What it is. Change many people at once, with a preview first. **Why you need it.** Move everyone's calls after a holiday, share out work between agents, or pause a group while you check something.

Steps

- 1 On **People**, tick the people, or click **Select all matching people**.
- 2 Choose an **Action** (table below) and fill in its fields.
- 3 Click **Preview changes**. **Review changes** shows "N selected · N eligible · N skipped" and why.
- 4 Click **Apply to N people**.
- 5 Watch **Operation progress**; it updates every 10 seconds.

Actions

Action	What it does
Reschedule queued calls	Makes calls due Now or At a specific time. Promised callbacks stay unchanged unless you switch on Release promised appointments into the ordinary call queue .
Distribute calls by capacity	Spreads queued calls across the chosen Agents from a Start date , at Calls per agent per day (default 40). Calls already assigned on other campaigns use up capacity; callbacks and paused people are kept.
Assign agent	Gives the people to one agent.
Pause for review	Stops serving or sending to them. A Reason is required.
Resume	Lifts a pause.
Set recipient timezone	Sets the timezone used for recipient-local hours.
Remove from campaign	"Removed people are not called again and keep their history. Anyone already finished or on a call right now is left alone."

Good to know. You can select 1 to 50,000 people, and the preview expires after 15 minutes. People can be skipped as "Already completed", "Currently being called", "On an automated stage", "Paused; resume separately" or "Promised callback preserved". Changes are applied in the background; **Cancel remaining** stops the rest and keeps what was done, and **Restore unchanged members** puts back the people nobody has touched since. A due time never overrides calling hours or the gap between attempts.

5.6 By day

What it is. **By day** on People shows "How many calls and promised callbacks fall on each day, per agent." **Why you need it.** Spot an overloaded Monday before it happens.

Steps

- 1 On **People**, click **By day**.
- 2 Choose a **Starting date**, a **View** (Day or Week) and an **Agent** (All agents, Unassigned or one person).
- 3 Click **Show schedule**; use **Previous** and **Next** to move.
- 4 Click a count to see those people, or **Reschedule** to open People with that action ready.

Columns are Day, Queued calls, Promised callbacks, Paused, Total, Daily target and Above target. "Daily targets are planning goals, not reserved availability or hard limits." Earlier work shows as "Before selected dates".

5.7 One person's History and follow-up controls

What it is. Every call, message, reply and manager action for one person on this campaign. Open it with **History** on their People row, or from the call card.

- **History** lists events newest first: time, who (an agent, or "automated processing"), stage and outcome, where they moved, notes, and links to the conversation or meeting. Filter by **Channel** (Calls, Email, SMS, Inbound, Manager

actions) or search.

- **Where they are** shows status, stage, attempts ("N in total, N on this stage"), next action and, if finished, why their run ended.
- **Message executions** lists automated sends and lets you settle uncertain ones (section 7.9).

Manage follow-up

- 1 On the person's History, find **Manage follow-up** (shown for open people who are not on a live call).
- 2 Choose **Change agent**, **Schedule callback**, **Pause follow-up** (with a reason) or **Resume follow-up**.
- 3 Save. You see "Saved."

Good to know. If the person is on a call, you are told "This person is on a call right now. Try again when the call is logged." If someone else changed them first: "This person changed since the page loaded. Reload and try again." Finished people cannot be reactivated, and resuming re-checks the do-not-call list.

5.8 Schedule a callback for someone

What it is. A manager can book a callback for a person on behalf of an agent. "A callback reserves 15 minutes for the selected agent."

Steps

- 1 On **People**, click **Schedule callback** on the person's row.
- 2 Choose the **Agent**.
- 3 Choose a **Callback date and time**, or use **Choose an available time**: set a **Starting date** and click **Find next available day**.
- 4 Save. You see "Callback scheduled. A 15-minute window is reserved for this agent."

Good to know. "Availability respects campaign hours, recipient hours, holidays, staff availability, meetings, and existing callbacks." Holidays, staff working hours and meetings come from the online meeting scheduler on sites that have it. The search looks 14 days ahead. You cannot schedule a callback for someone on a live call; the agent does that from the call.

5.9 How people are shared between agents

- **The shared pool.** People with no assigned agent can be served to any agent switched on for the campaign (narrowed by territory, skill and language routing when those are on).
- **Assigned people** always go to their own agent.
- **Personal callbacks.** When an agent promises a callback to someone from the pool, that person becomes theirs. If the next outcome sets no new callback, they go back to the pool. Someone already assigned stays with their assigned agent.
- **Released callbacks.** With **Release overdue callbacks to any agent** on, a callback that is overdue by the chosen minutes, or whose agent has left the campaign, can go to any agent. The overdue-callback alert stays until

someone calls.

- **Rule "Hand to another agent"** returns the person to the pool.
- **Hand to a colleague** (from the call card) gives the person to a named agent, due now, with no attempt counted.

5.10 When someone replies or books a meeting

On sites with the messaging system (section 2.8), a new email or text from someone's email address or phone number pauses them on **every** open campaign: "Reply received; review before continuing outreach." This happens for any inbound message from them, not only replies to campaign messages. On sites with the online meeting scheduler, booking a meeting themselves pauses them too: "Meeting booked; review before continuing outreach." Replies and delivery reports are recorded even while Business Phone is switched off.

Steps to continue

- 1 Read the reply in the Customer Inbox (the History links to the conversation).
- 2 On the person's History, use **Resume follow-up** if they should still be called, or change their agent or schedule a callback.

Paused people are listed in the Recovery queues (section 7.5). Replies appear in History as inbound activity; they are not counted as call attempts.

5.11 Changing a running campaign

- Saved changes apply to what happens next; past activity is kept.
- Deleting a stage sends anyone standing on it back to the first stage, and its rules go with it. The last stage cannot be deleted while people are on it.
- If two people edit at once, the second save is refused: "Another manager changed this campaign. Your edits have not been saved. Reload the latest version and reapply your changes."
- The Overview's **Changes to this campaign** lists the last 20 changes.

6. Working Calls — for Agents

This chapter is for agents — staff with the Sales User or Call Center Outbound Agent seat who are switched on for a campaign. You work from one screen, **My Call Queue**, and one call card. The system hands you one person at a time, in the right order, inside the right hours — you never have to choose who to call next.

6.1 My Call Queue

Open **Business Phone > My Call Queue**, the button on the campaign list, or **Open campaign workspace** on the Call Center agent desktop (and, on CRM sites, the My Desk card).

Steps to take a call

- 1 Check **Your status**. If it says Away, click **Set Ready**.
- 2 If you are on more than one campaign, choose a **Campaign to work**, or leave it on **Any campaign I am on**.
- 3 Click **Start the next call**. "You are handed one person at a time, and nobody else can be given them while you have them."
- 4 Work the call on the call card (section 6.3).

What the screen shows

Item	Meaning
Your status	Ready, Away or Busy. Busy is set automatically during a call. Go Away after this call sets you to Away once you finish. Your status is shared across all your campaigns.
Your current call	Resume call: {name} takes you back to a call you left open.
Ready now / Logged today	Calls waiting for you, and calls you have logged today with progress against your daily target (your targets across campaigns added together).
Next up	The next 10 people, with stage, due time and attempts.
Why people are waiting	Counts of people who are not due yet and why: paused for review, scheduled for later, currently claimed, within their contact cooldown, outside recipient-local calling hours, or waiting on an automated email / SMS stage. "These reasons can overlap; they are not additional due calls."

6.2 Who you are handed, and in what order

You are only handed someone who is due now, on a call stage of a running campaign you are switched on for, inside calling hours (and the recipient's local hours when the campaign uses them), past the gap between attempts, not paused, and not with another agent. If the campaign uses territory, skill or language routing, they must also match you.

Order

- 1 Callbacks that are due come first.
- 2 Then, on CRM campaigns, companies with the highest call priority (section 8.6).

3 Then whoever has been waiting longest.

Good to know. People assigned to you, and callbacks you promised, wait for you. People in the shared pool go to whichever agent is ready first. Before you are handed someone, they are checked against the do-not-call list; anyone on it is retired from the campaign instead of being served.

6.3 The call card

The call card, titled "Calling {name}", has everything for one call.

Part	What it gives you
Toolbar	The campaign, calls logged today (and your target), how many are still waiting, and Skip for now .
Context strip	Name, phone (tap to dial), the person's local time and timezone, and a jump link to Outcome and notes .
Contact header	Company, stage, which attempt this is (for example "attempt 2 (1 of 3 on this stage)"), Open the customer record (or prospect or contact record) when the source has one, and History .
Call script	What to say on this stage.
Objections / Rebuttals	Suggested answers, with a search box, when the stage has them.
How did the call go?	The outcome buttons, notes and save buttons.
Book a meeting, Send email or SMS, Contact details, Hand to a colleague	Tools you can use during or after the call. Booking needs the online meeting scheduler and messages need the messaging system (section 2.8); Contact details appears when the source lets details be edited (call lists and the CRM).
Last few attempts	The last 10 contacts on this campaign.

Good to know. The person is held for you for 30 minutes, and the card renews that every 5 minutes while it is open. Notes you type are kept in the browser tab, so if the page reloads you see "Unsaved notes were restored for this call." If there is no phone number on file, add one with **Contact details**.

6.4 Recording the outcome

Steps

- 1 Under **How did the call go?**, click the outcome. Outcomes are grouped **Reached them**, **Did not reach them**, **Won** and **Lost**.
- 2 Check the hint, "Selected outcome: {label} · Next: {what happens}".
- 3 Type **Notes**: "Anything worth knowing next time - who answered, what they said, when to try again." (up to 5,000 characters).

- 4 If the outcome asks for a callback or a meeting, complete it (sections 6.5 and 6.6).
- 5 Click **Save and next call** to carry on, or **Save and stop** to finish.

The confirmation tells you what happened, for example "{Outcome} recorded for {Name} - next due {time}." or "{Name} is marked as won." Anything extra the rule did is added: an email or text queued, a task created, the campaign manager told.

"Do not call again" asks you to confirm: "Add them to the do-not-call list? They are removed from every campaign and never called again." Use it only when the person asks not to be contacted.

Good to know. If you see "Routing is missing for this outcome. Your notes were not saved. Ask a manager to add its stage rule, then retry.", copy your notes somewhere safe and tell your campaign manager. Every call's result is also written back where the person came from: their last result on a call list, a note on the customer, or the company's activity history in the CRM.

6.5 Promising a callback

When an outcome is set to "Keep them here and call back later" (for example "Asked to be called back"), the card asks for a **Requested callback** time.

Steps

- 1 Pick the outcome.
- 2 Enter the **Requested callback** date and time, or set a date in **Find available callbacks** and click **Find slots** to see open 15-minute times.
- 3 Save the call.

Why a time may be refused

Message	What to do
"Choose a future callback inside the campaign calling hours."	Pick a time inside calling hours.
"Choose a callback with at least 15 minutes remaining in the calling window."	Pick an earlier time, or the next day.
"Choose a callback inside the recipient's local calling window ({window})."	Pick a time inside their local hours.
"That callback is inside the contact cooldown. Choose a later time."	They were contacted too recently on another campaign; pick a later time.
"This agent already has a callback within that 15-minute window."	Pick another slot.
"This agent is outside their personal working hours or has time off." / "This agent has a scheduled meeting at that time."	Pick another time.

Good to know. Callback times are entered in the business timezone shown beside the field. A callback you promise to someone from the shared pool makes them yours: they come back to your queue at that time. If the campaign releases overdue callbacks, someone else may call them if you are too late.

6.6 Booking a meeting

If the campaign has a meeting type (sites with the online meeting scheduler, section 2.2), you can book a meeting while you are still on the call. "Books on the spot and emails them the invite." Without one the card says "This campaign has no meeting type set, so there is nothing to book."

Steps

- 1 Open **Book a meeting**.
- 2 Choose a **Meeting date** and **Meeting time** (slots for the next 14 days).
- 3 Click **Book it**. You see "Meeting booked for {date time} - the confirmation and calendar invite are on their way to {email}."
- 4 Record "Meeting booked" as the outcome.

Good to know. The person needs an email address first; add one with **Contact details**. One booking per call. If an outcome's rule asks for a meeting, the card says "This outcome asks for a meeting. Use Book a meeting before saving, or continue without one" — switch on **Continue without a booking** if they declined.

6.7 Sending a quick email or text

Send email or SMS lists the messages attached to the campaign. "Choose a message below to send it now. Replies return to Customer Inbox." It needs the site's messaging system (section 2.8); without one the list is empty.

Steps

- 1 Open **Send email or SMS**.
- 2 Click **Preview** to check the message.
- 3 Click **Email {name}** or **Text {name}**.

You see "Email sent to {email}." or "Text sent to {number}." or "Message queued; it will send when the contact is eligible." Messages sent during a live call are not held back by the gap between attempts. The person is read fresh from their source first: if that cannot be done you see "The current contact record could not be checked, so nothing was sent.", and if their address or number changed since the card opened, "Contact details changed before sending. Choose the message again for the updated recipient."

Good to know. "This phone is not approved for SMS" means the number is not marked as an approved mobile; switch on **Mobile number approved for SMS** in Contact details once the customer agrees. If no messages are listed, ask your campaign manager to attach some in Setup > Messages. Nothing is ever sent to someone on the do-not-call list.

6.8 Updating contact details

- 1 Open **Contact details** ("Add or update email / phone").
- 2 Edit **First name**, **Last name**, **Email** or **Phone**. "Include the country code for international numbers."
- 3 Switch on **Mobile number approved for SMS** if they agreed to texts.
- 4 Click **Save contact and refresh messages**.

"Saved changes update the contact's own record. Previous addresses stay available on the record." Contact details are offered for call lists and the CRM; Customers campaigns do not edit the customer from the call card.

6.9 Skip, hand to a colleague

Skip for now

Skip for now "Hides this person from your queue for 15 minutes. No attempt is recorded." Use it when you need to come back to someone shortly.

Hand to a colleague

What it is. Pass the person to a named colleague, for example a specialist or the person's usual contact. "This person becomes due in your colleague's queue, subject to calling hours and their availability."

- 1 Open **Hand to a colleague**.
- 2 Choose the **Colleague**. Only active agents who meet the company's call requirements are listed.
- 3 Copy any unsaved notes into **Note for them** (up to 500 characters).
- 4 Click **Hand to colleague**.

"No attempt was recorded." Any future callback on the person is cleared. If nobody qualifies you see "No other active agent meets this company's call requirements."

6.10 Why is my queue empty?

When there is nothing to call, the queue says "No calls available right now" and tells you why.

You see	What it means
"You are Away. Set Ready to receive the next eligible call."	Click Set Ready .
"Nothing to call right now - outside calling hours for {Campaign} ({hours})."	Calling hours are closed. Come back when they open.
"Next saved due time: {time}"	Nobody is due yet; that is when the next person will be.
"N people are outside recipient-local hours"	It is too early or late where they are.
"N due people are routed to colleagues who cover their territory."	They belong to other agents' territories.
"N open calls have no eligible assigned or matching agent."	Nobody has the skills or language they need (CRM campaigns). Ask your campaign manager to check Agents and the company's call requirements.
"You are not on any running campaigns"	You are not switched on for a running campaign, or its setup is not finished.

Open **Why people are waiting** for the counts behind it. If the queue reports that the do-not-call list could not be checked, no call is served: tell your campaign manager before calling anyone.

7. Results and Keeping It Healthy

Open a campaign's **Results** tab. It is one page: export at the top, then **Needs attention**, the figures, and activity by date.

7.1 The headline figures

Tile	How it is counted
People	Everyone on the campaign, with how many are still in flight.
Won	People won, as a percentage of those finished (won, lost, do not call or removed).
Attempts	Calls with an outcome, and attempts per person. Emails and texts are not counted.
Reached someone	Percentage of attempts whose outcome counts as Reached them, Won or Lost — not counting wrong or disconnected numbers.
Attempts per win	How much calling each win took.

The Overview shows a shorter set: People, Won, Attempts and **Due now** (with how many are more than a day late).

7.2 Against the plan

With a start date and an expected end, Results projects when the campaign will finish at the current pace: "At X people a day, this finishes around {date}." It then says whether you are "On track" or "Behind - projected to finish N days after the expected end date". It also warns when people are more than a day past their due time. Without a start date it says progress cannot be measured; early on it says it is too early to project.

7.3 Where people are, messages, agents and activity

- **Where people are** — counts per stage, plus Won, Lost, Do not call and Removed.
- **How the calls went** — call outcomes only.
- **Messages** (when the campaign sends any) — Accepted for sending, Delivered, Not delivered, People who replied, Waiting to send, Failed, Needs checking and Cancelled. "Accepted means the email or text service took the message - not that it arrived. Delivered counts text delivery receipts; email has no delivery tracking."
- **Agents** — each agent's calls, today against target, reached and won.
- **Activity by date and channel** — choose **From**, **Through** and a **Channel**, then **Apply range**. The default is the last 30 days; the longest range is 367 days. Cards show call attempts, connected calls, people converted, and email and SMS activities.

7.4 Needs attention and alerts

What it is. Alerts about problems that need a person, shown to people who manage the campaign. Alerts are checked on each run of the scheduled campaign job (every 10 minutes) and when the page opens. They close by themselves when the problem clears and come back if it returns. Alerts appear on screen only; no email or text is sent.

Alerts you may see

Alert	What to do
"This campaign was scheduled to start on {date} and is still a draft: {first blocker}"	Fix the blocker on the Overview, then start it.
"{n} promised callbacks are overdue."	Make sure the agents are working; consider releasing overdue callbacks (section 2.2).
"{n} people have been waiting more than a day."	Add agents, extend hours, or reschedule.
"{n} message jobs need review. Check delivery before retrying."	Open the Recovery queues (section 7.5).
"{n} people are paused for review."	Review and resume them.
"{n} people have no assigned agent."	Usually fine — the shared pool is normal.
"The campaign worker has not completed successfully in the last 25 minutes."	The scheduled job Run Call Campaigns (every 10 minutes) has not finished. Calls are not affected, but automated emails and texts, nightly top-ups and scheduled starts wait. Check that Business Phone is switched on; contact Indition support if it persists.

Acknowledge and alert timing

- 1 Click **Review** on an alert to go to the right place, or **Acknowledge** to show you have seen it. "It will resolve when the underlying problem clears."
- 2 Under **Alert settings**, set **Minutes before an alert is overdue** (5 to 10,080; default 60) and click **Save**. An alert nobody acknowledges is marked Overdue after that time.

7.5 Recovery queues

What it is. "Resolve people paused for review and messages that need a delivery decision." Open it from **Open recovery queues** on Results, or from the Due and Needs Review links on the campaign list.

- Cards count message executions needing review, people paused for review, follow-ups more than a day overdue, and expired call claims.
- Filter by **Message state** (Failed, Uncertain delivery, Sent, outcome pending, Stale sending) or **Member reason** (Paused for review, Overdue, Expired claim).
- **Review execution** and **Manage follow-up** open the person's History, where you settle the message or resume the person.

7.6 Exports

Export	Where	What you get
Export people	Results (people who manage the campaign)	Every person with company, contact, phone, email, stage, status, attempts, next action, last attempt, last outcome and reason. No row limit.
Export	People toolbar	All, filtered or selected people.
Export preview	Add people preview	The audience with priority and reasons.
Export	Campaign list Actions	Campaigns with status, people, won, due, needs review, agents and dates.

7.7 Comparing campaigns

What it is. "Compare up to six campaigns side by side using one date range and channel." Needs the "See and manage every call campaign" permission.

- 1 On the campaign list, tick 2 to 6 campaigns.
- 2 Open **Actions > Compare Selected Campaigns**.
- 3 Set the date range and channel.

Rows include activities, people contacted, call attempts, connected calls, connection rate, people converted, and email and SMS activity. **Lifetime cohort context** adds whole-life figures.

7.8 Dashboards

When phone dashboards are on, the dashboard builder offers three starter dashboards — **Call Center Agent**, **Live Call Floor** (refreshes every 30 seconds) and **Campaign Manager** — built from the **Call Campaigns** data sources:

- Campaign Contact Activity, Campaign Progress and Work Queue, Campaign Stage Funnel, Campaign Agent Performance, Campaign Completion Forecast and Campaign Health.
- My Call Activity and Daily Targets, My Call Activity Today and My Current Call List.
- Live Agent Status and Call Activity Today - All Agents.

The Call Center Agent dashboard has an **Open My Call Queue** button.

7.9 How automated emails and texts are sent

Automated stages send through the site's messaging system (the Customer Inbox), inside calling hours (and recipient-local hours when used), up to 200 per run of the scheduled job **Run Call Campaigns**, which runs every 10 minutes. Just before each message is sent, the person is read fresh from their contact source.

Situation	What happens
Hours are closed	The message waits and goes at the first moment both windows are open.
Held for another reason (paused, cooldown, with an agent, campaign not running)	Tried again after 15 minutes.
The provider accepts it	Counted as accepted; the stage's rule for "Message accepted for sending" runs.
The provider refuses it (bad number, opted out, no mail server)	Failed; the "Message send failed" outcome fires so a rule can route it.
No answer or a timeout	Uncertain. It is never re-sent automatically; a person decides.
A delivery receipt says failed or undelivered	The person is paused for review.
The contact source cannot be read, or the record is gone or inactive	Held and tried again: "Contact source could not be checked; delivery held for retry."
Business Phone is switched off	Nothing is sent; queued messages wait until it is on again. Replies and delivery reports are still recorded.
Person finished, was added to the do-not-call list, or their details changed before sending	Cancelled.

Settle an uncertain message

- 1 Open the person's History (from the Recovery queues).
- 2 Under **Message executions**, check the inbox or provider history.
- 3 Click **Confirmed sent — record it** or **Confirmed not sent — retry**. Other stuck items offer **Retry send** or **Retry recording outcome**.

Good to know. A stage with no rule for "Message accepted for sending" pauses people: "Automated stage needs configuration repair". An automated stage set to repeat "straight away" never re-sends sooner than an hour (or the campaign's gap, if longer).

8. When You Call from the Commerce Connection CRM

This chapter applies only on sites with the Commerce Connection CRM, to campaigns whose **Who to call** is **CRM customers and prospects**. It covers the CRM tools that change what a campaign does. Campaigns on call lists or Customers can skip it.

8.1 Segments are the campaign's lists

What it is. On a CRM campaign, **Start from a list** offers the CRM's segments: saved, named definitions of who to call, kept on the CRM's **Segments** screen. A **dynamic** segment is worked out fresh each time from its criteria; a **static** segment is a fixed list of companies. **Why you need it.** Define "Midwest manufacturers not contacted in 90 days" once and reuse it in any campaign, with nightly top-up (section 4.7).

- **Save as list** on the Add people panel saves your filters as a new dynamic segment (section 4.2).
- A segment's page has **Start a campaign**, which creates a CRM campaign and opens People with that segment chosen.
- Retiring or deleting a segment does not touch campaigns built from it: "Any campaign built from it keeps the people it already has." It can no longer be topped up from.
- A segment whose definition stops being valid (a tag or option it uses was retired or deleted) **selects nobody** until it is repaired, and says so in the campaign's list picker. Merging tags instead of deleting them avoids this.

8.2 CRM filters on Add people

A CRM campaign's Add people panel adds these filters to Search, No campaign call since and Timezones:

Filter	What it narrows
Prospects or customers	Prospects only, customers only, or both.
Pipeline Stage, Industry, Lead Source, Company Size, Territory	The CRM's own option lists (Settings > Contact Options on the CRM).
Owner	The company's owner.
Tags and Tags must match	Any tag or all tags.
Last contact	Never, recently, or not for a while.
Next action	Overdue, today, soon, none set.
City, State, Country	Exact match, any case.

"Why isn't someone here?" names the exact filter that leaves a company out, for example 'Does not match "City: Boston".'

8.3 Adding prospects from the CRM screens

Besides the campaign's Add people panel, you can add people from the CRM itself:

- 1 On the **Prospects** grid, tick prospects and choose **Change N Selected > Add to a call campaign**, or open one prospect and choose **Add to campaign**.
- 2 Pick a Draft, Running or Paused CRM campaign you manage.
- 3 Confirm. The result says how many were added, already on it, or left out.

Up to 500 records per change. The same eligibility applies as on Add people: the do-not-call list, people already on it, no usable phone, other running campaigns, do-not-contact and inactive records are left out.

8.4 Company call requirements and timezone

On a prospect's or customer's edit page in the CRM:

- **Required call skills** — "Agents need every selected skill. Applies to every contact at this company when the campaign enables this routing." The choices come from the Call Skills list in the CRM's **Settings > Contact Options**.
- **Preferred call language** — "Agents must speak this language." Leave it on "Any language" when it does not matter. The choices come from the Call Languages list.
- **Recipient Timezone** — the company's local timezone, used for recipient-local hours. Contacts inherit it from the company.

The company's **Territory** is what territory routing uses (section 2.6).

8.5 Converting, merging and the Call Campaigns panel

- **Converting.** Moving a prospect to a won status with **Also convert it to a customer** (on the Pipeline board or in a bulk change), or the outcome "Became a customer", converts it and closes its open campaign places as won.
- **The Call Campaigns panel.** Every prospect and customer page has a **Call Campaigns** panel listing the most recent 25 campaign places: campaign, person, stage, status, attempts, last call, next action and a link to the journey. It also shows any do-not-call entries, and on a prospect, an **Add to campaign** button. "This company has never been added to a call campaign." when there is nothing to show.
- **Merging duplicates.** **Merge into...** on a prospect moves everything from a duplicate onto the record you keep, including its campaign places and do-not-call entries, then deletes the duplicate. Do-not-contact carries over and attempts add up. If both records are on the same campaign, the duplicate's place is stopped as merged. The merge is refused while an agent has the person on a call, and it cannot be undone.
- A customer on an open campaign cannot be deleted.

8.6 Call priority and how calls update the CRM

Call priority is a score from 0 to 100 that decides who is called first on a CRM campaign (after due callbacks). The reasons are shown beside the score.

Raises priority	Lowers priority
Next action overdue (+35), due today (+30) or within 7 days (+18); further along the pipeline (up to +20); existing customer (+10); never contacted (+25) or not contacted for 30/90/180+ days (+9/+16/+22); last call reached and interested (+15)	Spoken to within 3 days (–15); each attempt (–5, up to –25). Zero for do-not-contact, inactive, won, lost, or a last call that ended in a loss.

Priority is re-scored after each call outcome, prospect save, bulk change, Log contact, board move, conversion and merge, and every night at 3:20 AM. A score of 0 puts someone last; it does not remove them.

What each call writes to the CRM

- Every attempt is written to the company's activity history.
- An outcome's **Sets pipeline status to** is applied: open statuses only move forward; won and lost always apply.
- "Do not call again" marks the company do not contact when the outcome says so.
- A rule's **Create a follow-up task** and **Tell the campaign manager** actions work only on CRM campaigns.
- A callback sets the company's next action date.

9. Reference

9.1 Limits and defaults

Item	Value
Max attempts per person	On at 5 for a new campaign; 1-1,000,000
Gap between attempts	24 hours for a new campaign; 1-168 hours
Stage attempt limit	1-99 (3 suggested)
Rule delay	1-3,650 hours or days
Calling hours (new campaign)	Monday-Friday, 9:00 AM-5:00 PM
Recipient-local window	9:00 AM-5:00 PM, Monday-Friday
Release overdue callbacks	Off; 30 minutes when on; 1-10,080
Daily target	1-1,000,000 (20 suggested); a planning figure, not a limit
Territories / skills / languages per agent	Up to 200
Audience preview	Up to 50,000 people; expires after 15 minutes
Bulk action	1-50,000 people; preview expires after 15 minutes
Distribute calls	1-9,999 per agent per day; 40 by default
Spreadsheet add	50,000 rows per file; upload kept 24 hours
Import history	Newest 50 runs; 500 changes per run shown
Hold on a person while calling	30 minutes, renewed every 5 minutes
Skip for now	15 minutes
Callback	Reserves 15 minutes; needs 15 minutes left in the window
Callback and meeting slot search	14 days ahead
Call notes / hand-off note / pause reason	5,000 / 500 / 500 characters
Stage name / call script	128 / 20,000 characters
Objection pairs	100 per stage; objection 2,000, rebuttal 10,000 characters
Messages	Name 255, subject 500, email 20,000, SMS 1,600 characters
Email attachments	PDF, PNG, JPG, DOCX, XLSX; 10 MB each
Test send	One per page load
Alert overdue time	60 minutes by default; 5-10,080

Results / Compare date range	Last 30 days by default; up to 367 days
Compare	2-6 campaigns
Grid page sizes	50 / 250 / 500 / 1,000; 250 by default
Scheduled job Run Call Campaigns	Every 10 minutes; the worker alert shows after 25 minutes without a successful run
Automated emails and texts	Up to 200 per run; held messages are tried again every 15 minutes, or as soon as the calling window reopens
Contact refresh	Before each call and each message; open people whose copy is older than 15 minutes are refreshed on each run
Nightly top-up	Once a day, on the first run after midnight in the campaign time zone
Prospect bulk change / add to campaign (CRM)	500 records per change
Call priority re-score (CRM)	After each change, and 3:20 AM daily

9.2 Messages you may see

Message	What it means / what to do
"This campaign is not ready to start: {blockers}"	Fix each blocker from the Overview checklist.
"You are not on that campaign."	Ask the person who manages campaigns to switch you on in Agents.
"Only a campaign manager can change this campaign."	You need Campaign manager on that campaign's Agents page.
"This preview expired. Preview again to check the latest eligibility."	Previews last 15 minutes. Run it again.
"This campaign is closed to enrollment."	The campaign no longer accepts new people.
"Add a stage before enrolling people in a running campaign."	Add a stage first.
"Routing is missing for this outcome."	Add a rule for that outcome on the stage.
"This call has changed or its claim expired."	Go back to the queue and resume or claim again.
"The call claim could not be renewed. Save your notes and check the queue."	Save now; the hold may have lapsed.
"Import session expired. Please upload the file again."	Uploads are kept 24 hours.
"That import has already been undone."	An import can be undone once.
"No available times in the next 14 days."	Check calling hours and the agent's availability, or choose a later starting date.
"They need an email address before a meeting can be booked"	Add an email in Contact details.

"No text inbox is set up, so campaign texts cannot be sent. Add one under Customer Inbox."	Set up a text (or email) inbox in the Customer Inbox.
"Campaign emails and texts need a messaging system on this website."	The site has no messaging system; use call stages only (section 2.8).
"Turn Business Phone on in its Settings first."	Business Phone is switched off on this site.
"Call campaigns are not installed on this site yet. Apply the Business Phone 1.7.9 database patch, then reload."	Ask Indition support to finish the Business Phone update.
"People are on this campaign already, so it keeps calling from here. Start a new campaign to call people from somewhere else."	Who to call is fixed once people are on the campaign.
"People cannot be added from a spreadsheet for where this campaign calls from. Use Add people instead."	Customers campaigns add people with the Add people panel only.
"The current contact record could not be checked, so nothing was sent."	The contact source could not be read. Try again shortly.
"Contact details changed before sending. Choose the message again for the updated recipient."	The person's address or number changed; choose the message again.
"The do-not-call list could not be checked, so no call has been served..."	Nothing is served until the list can be read. Tell your campaign manager.
"This editor is out of date. Reload the page before saving."	Someone saved first. Reload and reapply.

9.3 Things that cannot be undone

- **Deleting a campaign** — permanent, and only offered before anything has been worked.
- **Archiving or completing a campaign** — there is no un-archive button, and a completed campaign cannot be started again.
- **Who to call** — fixed once people are on the campaign.
- **A message's channel and availability** — fixed once it is saved.
- **"Do not call again"** — adds a do-not-call entry for every campaign. Removing the entry later does not put the person back on any campaign.
- **Merging a duplicate prospect** (CRM).
- **Deleting a segment or tag** (CRM) — campaigns keep their people, but segments that used a deleted tag select nobody until edited.
- **Sent messages, logged calls and history** are never deleted; removing someone keeps their history.
- **Import undo** works once per import and leaves later changes alone.
- **Bulk actions** — changes already applied stay if you cancel; **Restore unchanged members** puts back only untouched people.

9.4 Glossary

Term	Meaning
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Agent	A staff member switched on to take calls for a campaign.
Campaign manager	An agent who can also change one campaign's setup and people.
Stage	A step in the campaign: a call, an email or a text.
Outcome	The result an agent records at the end of a call, or a message result.
Rule	What happens next for given outcomes on a stage.
Shared pool	People with no assigned agent, served to whichever agent is ready.
Callback	A promised time to call someone back, reserved for one agent for 15 minutes.
Gap between attempts	The minimum wait before the same person is contacted again (also called the contact cooldown).
Recipient-local hours	A calling window in the person's own timezone.
Contact source	Where a campaign's people come from and where results are written back: Call lists, Customers, or the Commerce Connection CRM.
Call list	People uploaded from a spreadsheet into Business Phone, for sites with no other contact system.
Segment	In the CRM, a saved definition of who to call (dynamic) or a pinned list (static).
Top-up	Adding new matches from the campaign's list to a running campaign.
Exclusive campaign	A campaign that only takes people on no other running campaign.
Paused for review	Not served or sent to until someone resumes them.
Do-not-call list	People who must never be called, emailed or texted, for all campaigns or one.
Do not contact	A mark on a person's own record — a CRM company flag, or a call-list person marked "Do not call again" — that keeps them off every campaign calling from that source.
Template	A saved snapshot of a campaign's structure for building new drafts.

9.5 Getting help

- Agents: ask the person who manages your campaign first — most "why can't I..." questions are setup (Agents, calling hours, rules).
- People who manage campaigns: start with the Overview checklist, Results > Needs attention, and "Why isn't someone here?".
- Access is granted in **Manage Permissions**.
- For anything else, including the campaign worker alert (the scheduled job Run Call Campaigns), contact Indition support with the campaign name and what you see on screen.

End of manual.