



How to launch power dialer campaigns in Zoho Voice?

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Getting started

To get started with the power dialer, follow these steps:

1. Create a new campaign.
2. Import contacts for the campaign.
3. Customize the campaign.
4. Launch the campaign.

1. Create a new campaign

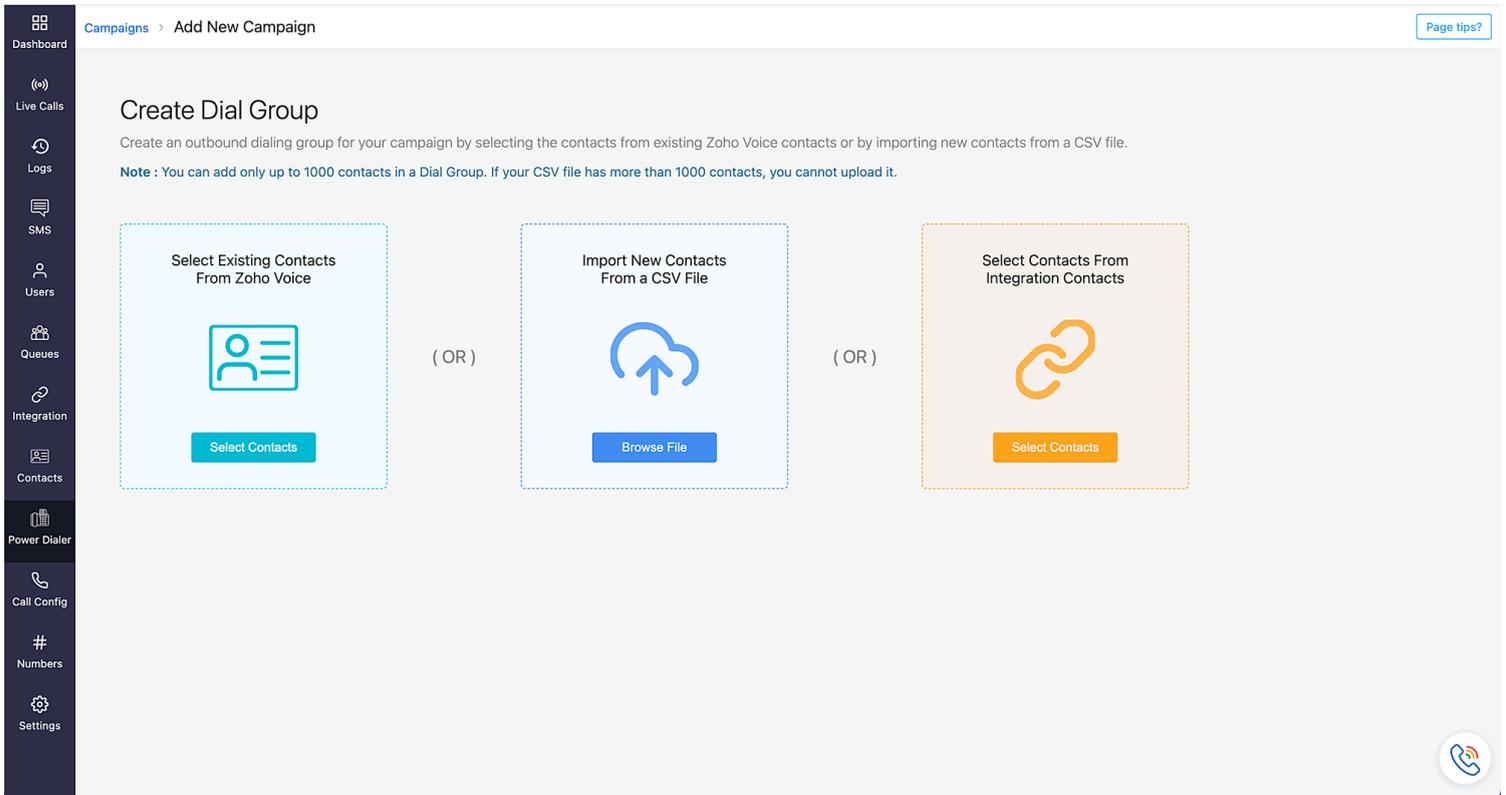
To create a new outbound call campaign:

1. Select the **Power Dialer** menu from the left menu bar.
2. Click the **Add Campaign** button in the top right corner.
3. The **Add Campaign** page appears, prompting you to create a Dial Group for the campaign.

2. Import contacts for the campaign

On the **Add Campaign** page, create an outbound **Dial Group** for your campaign by selecting and importing the contacts from one of the three sources listed below:

 **Dial Group:** A quick-curated list of imported contacts for efficient dialling. The dial group of a campaign can only have a maximum of **1,000 contacts**.



The screenshot displays the 'Create Dial Group' interface. At the top, it says 'Create Dial Group' and provides instructions: 'Create an outbound dialing group for your campaign by selecting the contacts from existing Zoho Voice contacts or by importing new contacts from a CSV file.' A note below states: 'Note : You can add only up to 1000 contacts in a Dial Group. If your CSV file has more than 1000 contacts, you cannot upload it.' Three options are presented in dashed boxes, separated by '(OR)':

- Select Existing Contacts From Zoho Voice:** Includes a person icon and a 'Select Contacts' button.
- Import New Contacts From a CSV File:** Includes a cloud and upload icon and a 'Browse File' button.
- Select Contacts From Integration Contacts:** Includes a link icon and a 'Select Contacts' button.

The left sidebar contains navigation items: Dashboard, Live Calls, Logs, SMS, Users, Queues, Integration, Contacts, Power Dialer, Call Config, Numbers, and Settings. A 'Page tips?' button is in the top right corner.

A. Import new contacts from a CSV file

Imports contacts via a CSV (.csv) file upload. When importing contacts from a CSV file, Zoho Voice prompts you to enter and map the following details:

The screenshot shows the Zoho Voice dashboard with the 'Create Dial Group' page. A modal window titled 'Map Your Data' is open, allowing users to configure contact import settings. The modal includes the following fields:

Field	Value
DEFAULT COUNTRY	United States
TAG NAME	US Leads
CONTACT NAME*	FIRST NAME
CONTACT NUMBER*	MOBILE
CONTACT EMAIL	EMAIL
CONTACT COMPANY	COMPANY

At the bottom of the modal are 'cancel' and 'Next' buttons. The background shows a 'Select Existing Contacts From Zoho Voice' button and a 'From contacts' section.

Default country: Determines the default country code for the contacts to be uploaded.

 The default country code selected above will be used for contacts without a country code.

Tag name: Assign a unique tag name to be used for quick classification and retrieval of contacts uploaded and saved in Zoho Voice.

 Tags constitute custom categories that help in quick retrieval of contacts. A contact can possess multiple tags.

Contact name: Map the relevant field label in the CSV file that matches the contact name.

Contact number: Map the relevant field label in the CSV file that matches the contact number.

Dashboard **Campaigns** > Add New Campaign Page tips?

CAMPAIGN NAME*

SNOOZE INTERVAL Seconds
Snooze interval range : Min 10 seconds to Max 300 seconds

ASSIGN TO

[Import New File](#) TOTAL CONTACTS : 4

DEFAULT COUNTRY : United States
Note: Prefixes the selected default country code to CSV numbers without any country code . Invalid numbers after prefixing are excluded from the dial group.

	NAME	NUMBER
C	Claire	+1 6666666666
A	Alexander	+1 8888888888
B	Brenda	+1 5555555555
A	Andrew	+1 4444444444

[Cancel](#) [Save](#)

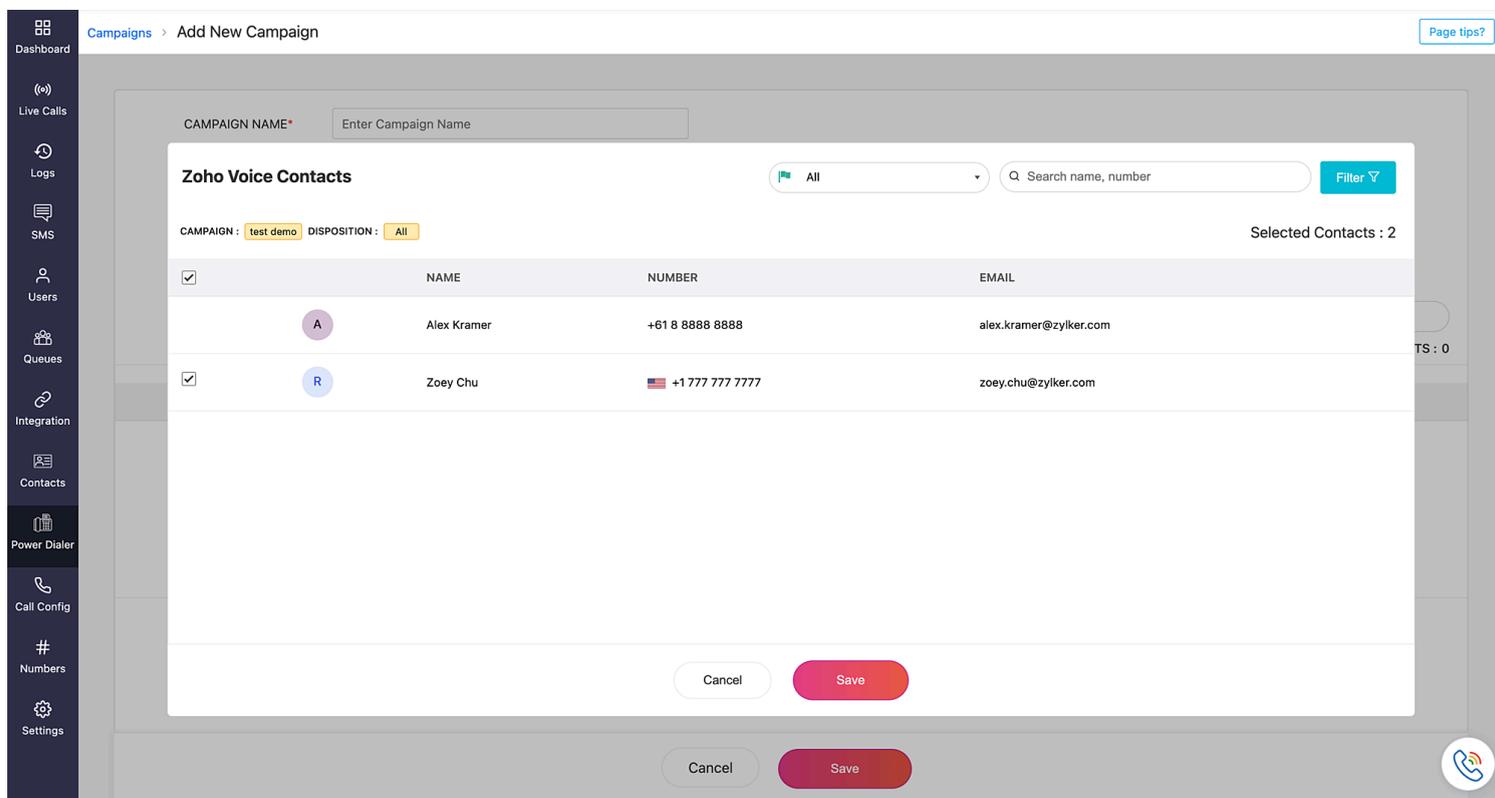
i All of the contacts imported via CSV files are saved in Zoho Voice's *Contacts* module along with the assigned tags for classification. These contacts can be reused for future campaigns.

B. Select existing contacts from Zoho Voice

Imports contacts directly from Zoho Voice's internalized *Contacts* module.

While importing contacts via the *Contacts* module, you can apply advanced filters on contacts by clicking the **Filter** button in the top right corner. There are two filter options available; the primary option is the *Campaigns* filter, upon which you can apply the *Dispositions* filter as a secondary option.

You can apply the *Campaigns* filter option only, or couple it with the *Disposition* filter option to target and import specific contacts into your new campaign.



Campaigns: The *Campaigns* filter option displays the list of available campaigns from which you can select the campaign of your choice by its name. Selecting a campaign lists all of the contacts constituting the dial group of the campaign. You can select all or manually choose specific ones.

Disposition: The *Disposition* filter option, when coupled with the *Campaigns* filter option, helps you target and filter contacts of a campaign with specific call outcomes.

Plus button: The + button helps you add more contacts into your new campaign by importing contacts from other existing campaigns with specific disposition codes.

New campaigns can also be created directly from the *Contacts* page that appears by clicking on *Contacts* menu in the menu bar along the left window pane.

Creating power dialer campaigns directly from the Contacts page

On the **Contacts** page, select contacts manually using the checkbox or by using the filters to curate the contacts for the campaign.

To apply filters, click on the **Filter** button in the top right corner.

Name: Filters contacts for a specific contact name.

Email: Filters contacts for a specific email ID.

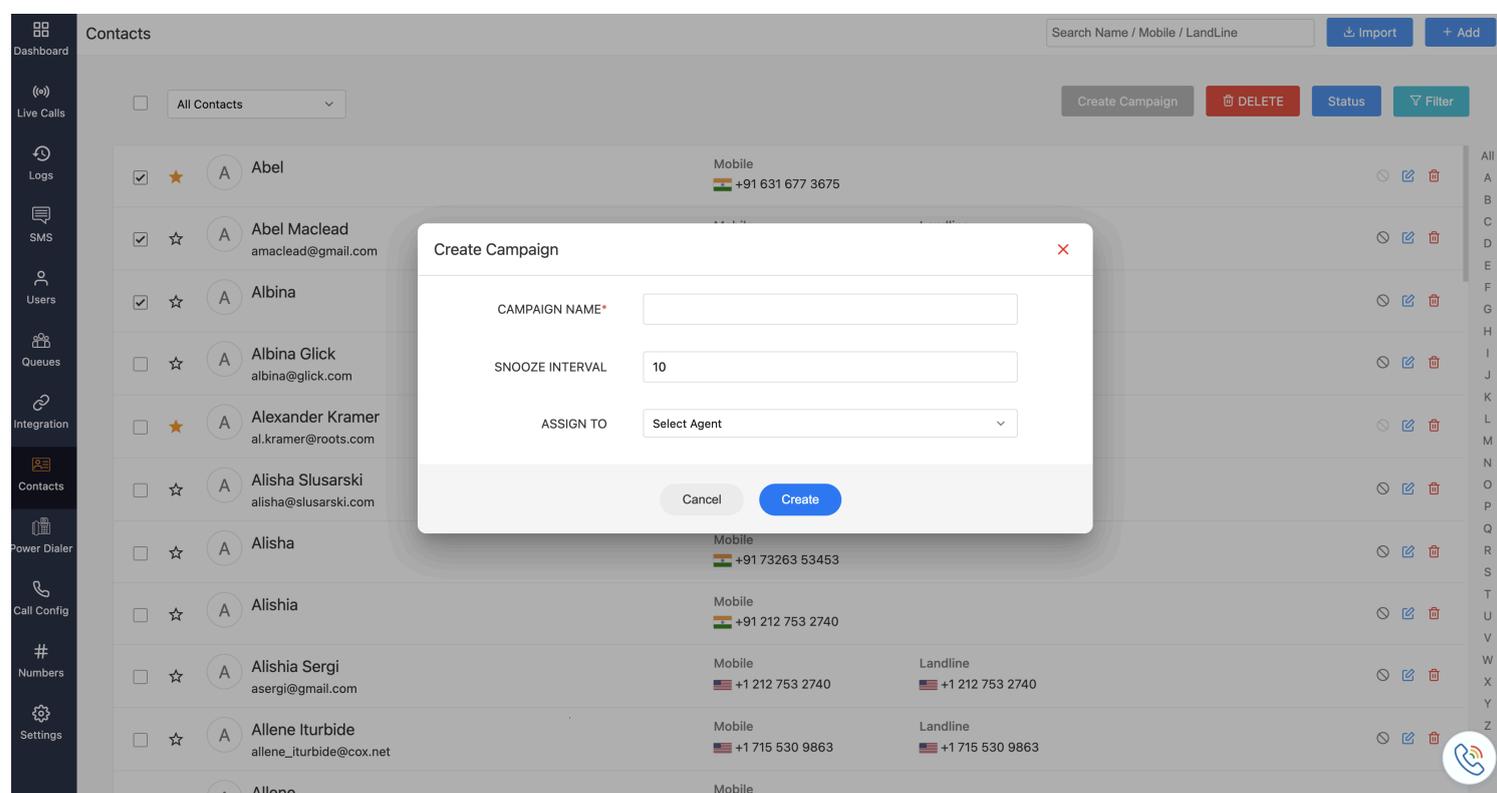
Company: Filters contacts by a specific company name.

Country: Filters contacts by a specific country.

Status: Filters contacts by the following status options:

- **Active:** Contacts who approve regular engagement.
- **Inactive:** Contacts who refuse regular engagement.
- **VIP:** Contacts requiring special services.

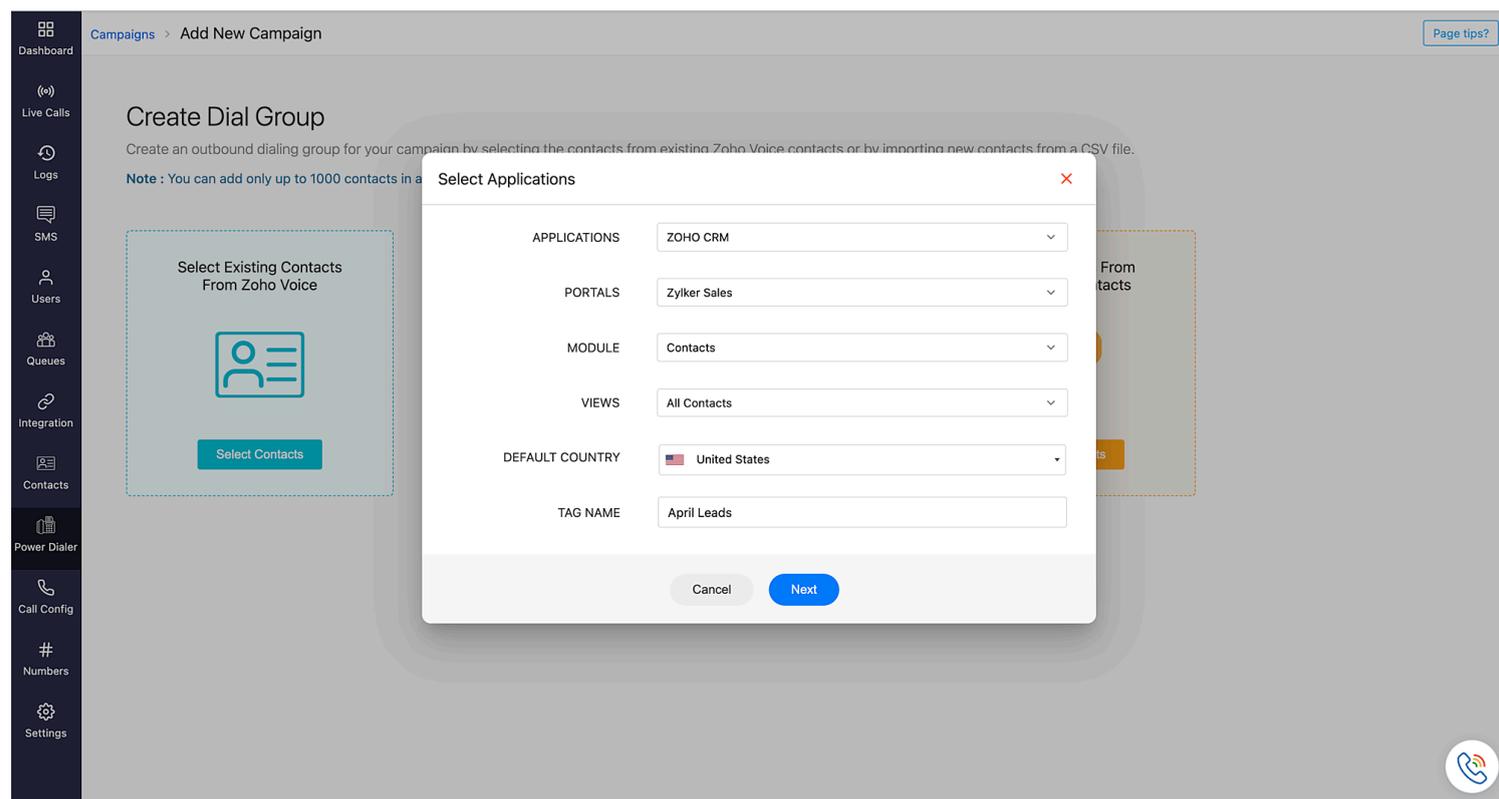
Campaign Tag: *Campaign Tags* constitute custom categories that help in the quick retrieval of contacts that are already saved in Zoho Voice's *Contacts* module via previous CSV file imports. A contact can possess multiple campaign tags.



Once you are done choosing the contacts, click the **Create Campaign** button in the top right corner. Name the campaign, pick a suitable snooze interval, assign the designated agents, and click **Save**. Your campaign will be successfully created and stays in the *Yet To Start* status.

C. Import contacts from integrated apps

Imports Leads, Contacts, or Deals saved under specific portals of the Zoho app integrated with Zoho Voice. While importing contacts via integration, the *Select Applications* dialog box prompts you to specify the following:



Applications: Select the designated application integrated with Zoho Voice from which you want the contacts to be imported. Zoho Voice integrates with Zoho CRM, Zoho Desk, Zoho Bigin, and ManageEngine ServiceDesk Plus Cloud.

Portals: From the list of available portals, select the specific access portal by its unique name. Portals act as the gateway for contacts imported from the designated Zoho app.

Modules: Modules are categories of data imported from the integrated Zoho app. Select the module of your interest. This imports the complete data stored under the respective module of the integrated Zoho app. Modules can be Contacts, Leads, and more, and may vary depending on the integrated Zoho app.

Views: Views are module-specific groups of contacts curated based on a defined set of criteria. When a module is selected, the custom list of views that have been applied to that module are also listed. Select the contacts you want to import into your dial group from the contacts curated under that view.

Dashboard **Campaigns** > Add New Campaign Page tips?

CAMPAIGN NAME*

Zoho Crm Contacts Selected Contacts : 5

<input type="checkbox"/>		FIRST NAME	LAST NAME	MOBILE	PHONE	EMAIL	COMPANY
<input checked="" type="checkbox"/>	A	Andrew	Green	-	(498) 971-7777	-	-
<input checked="" type="checkbox"/>	B	Brenda	Raymond	-	(243) 889-6666	-	-
<input checked="" type="checkbox"/>	A	Alexander	red	-	(349) 526-9999	-	-
<input checked="" type="checkbox"/>	T	test	Raymond	-	(616) 660-2222	-	-
<input checked="" type="checkbox"/>	A	And	Green	-	(448) 853-1111	-	-

i All the contacts imported via the integrated Zoho apps are saved in Zoho Voice's **Contacts** module. If the contacts already exist in Zoho Voice, the contact details are updated.

3. Customize the campaign

Once the dial group is created, you'll be directed to the *Create Campaign* page, where you'll be prompted to configure the campaign with customized settings. This determines the contacts in the dial group, how the campaign is run, how long the snooze interval is timed, and who can run the campaign.

Name the Campaign Name: Identifies the new campaign with a unique name.

Snooze Interval: Determines the short supplementary interval period between consecutive campaign calls. Acceptable values range from 10 seconds to 300 seconds.

Assign To: Specifies the agents who will handle the campaign calls.

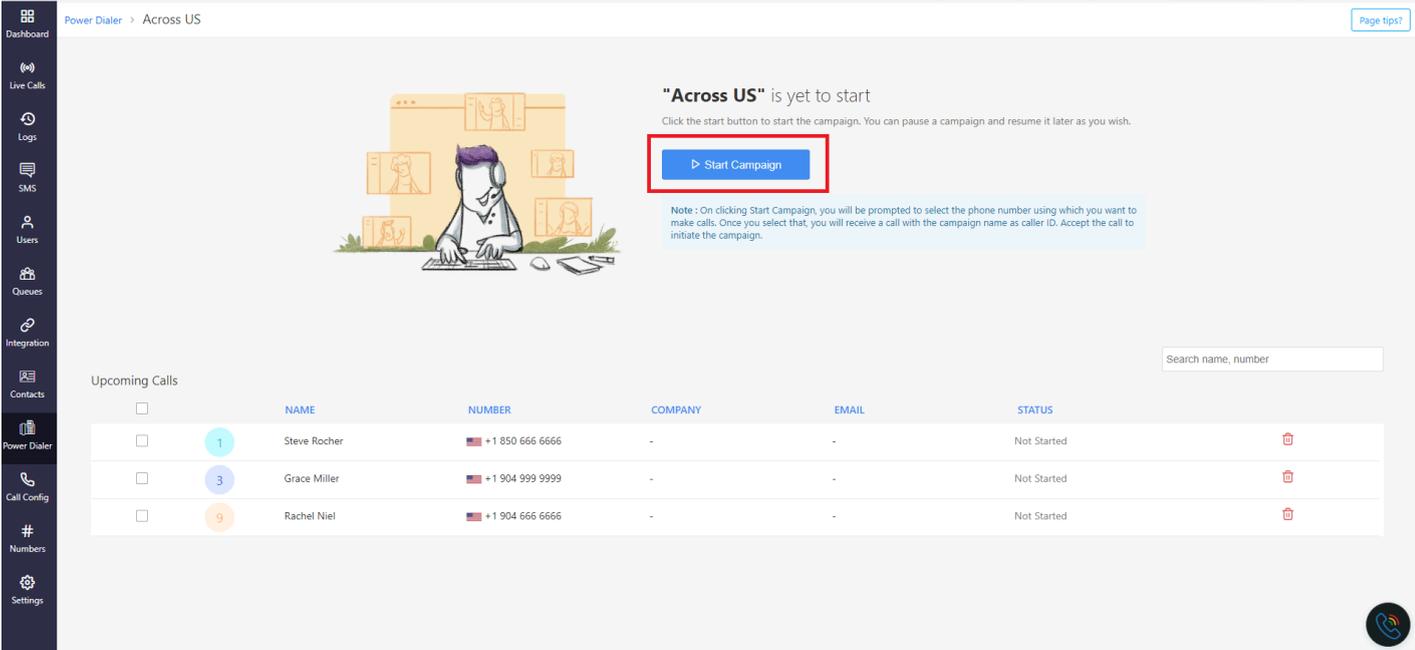
Add More Contacts: Adds more contacts to the dial group by importing them using one of the methods listed above.

4. Launch the campaign

Once the campaign is created and listed on the *Power Dialer* page, the campaign can be launched only by the designated agent associated with the campaign.

To launch a campaign:

1. Click on the campaign of your choice to navigate through it.
2. On the specific campaign page, click on the **Start Campaign** button at the top.



Power Dialer > Across US

"Across US" is yet to start
Click the start button to start the campaign. You can pause a campaign and resume it later as you wish.

[▶ Start Campaign](#)

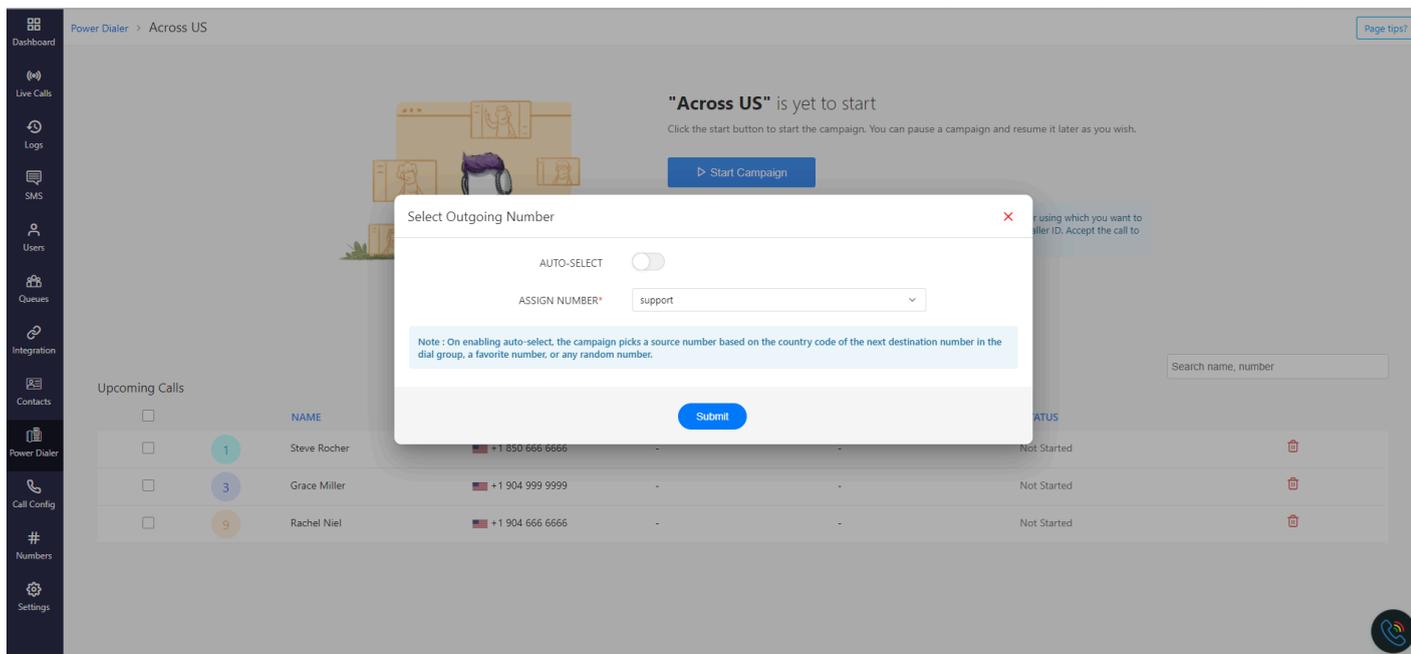
Note: On clicking Start Campaign, you will be prompted to select the phone number using which you want to make calls. Once you select that, you will receive a call with the campaign name as caller ID. Accept the call to initiate the campaign.

Search name, number

Upcoming Calls

	NAME	NUMBER	COMPANY	EMAIL	STATUS		
<input type="checkbox"/>	1	Steve Rocher	+1 850 666 6666	-	-	Not Started	
<input type="checkbox"/>	3	Grace Miller	+1 904 999 9999	-	-	Not Started	
<input type="checkbox"/>	9	Rachel Niel	+1 904 666 6666	-	-	Not Started	

3. After clicking *Start Campaign*, the *Select Outgoing Number* dialog box offers you two options to select the phone number that will be used for the outgoing calls of the campaign:



- i. In the first option, enabling **Auto-Select** will automatically choose the source number from which calls will be made. Auto selection chooses a source number based on the following order of priority:
 - Picks a number with a country code that matches the country code of the destination number lined up next in the dial group.
 - Picks the favorite number. If there are multiple favorite numbers, the auto-select option chooses a random favorite number.
 - Picks any random number under the organization.
- ii. On the other hand, as the campaign creator, you have the option to manually select a specific number from the list of available numbers and assign it to the campaign. This will be the number from which the outbound calls originate.

4. Once a selection is made click **Submit**.

5. An Incoming call arrives to the chosen number with the campaign name as caller ID acknowledging your selection.

6. Accept the call to initiate the campaign.

Pausing or stopping a campaign

Any ongoing campaign can be paused or stopped by the campaign's creator, the super admin, or the admin(s) of your organization.

i If a campaign is paused or stopped in the middle of an ongoing call, it won't disrupt the call. However, subsequent scheduled calls are impacted by the pause or stop.

Viewing power dialer campaign call logs

To view the call logs of a specific campaign:

1. Select **Logs** menu from the left menu bar.
2. On the *Logs* page, select the **Call Logs** tab and click on the **Filter** button on the top right corner to apply advanced filters.
3. Go to the *Campaigns* filter option and select the campaign name you want from the list of available campaigns.
4. Couple the *Campaign* filter option with other filter options, such as *Disposition* or *Agent*, to gain a granular view into specific campaign calls.

Cloning and editing campaigns

All of the campaigns created, ongoing, or completed are listed on the *Power Dialer* page where campaigns can be created by cloning or edited as follows:

Clone Campaigns

To clone any existing campaign, irrespective of its status or its creator:

1. Click the **Clone Campaign** button that appears by hovering the mouse over the right end of the campaign entry.
2. On the Clone Campaign page, Specify the name of the new campaign and click on the **Save** button at the bottom of the page.
3. You can modify the contacts, add more contacts from other source if required, and modify other configurations of the campaign.

Edit Campaigns

To update an existing campaign:

1. Hover your mouse over the right end of the campaign entry and click the **Edit Campaign** button that appears.
2. In the edit mode, you can update the campaign name and snooze interval, change the dial order of the dial group, assign new agents, and add more contacts to the campaign from other sources.

 For any product-related queries, reach out to support@zohovoice.com

