Maximise for Salesforce

Customisation Guide

Disclaimer of Warranty and Liability

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1. Introduction

The intention of this document is to guide you through the process of integrating Maximise for Salesforce into your Salesforce organisation.

- Section 2 provides step-by-step instructions for installing Maximise for Salesforce and configuring your Maximise for Salesforce account.
- Section 3 and 4 provide guidance notes for using Maximise for Salesforce as an administrator (section 3) and as an agent (section 4).

Maximise for Salesforce is primarily an outbound predictive dialler plug-in for Salesforce organisations, providing powerful on demand telephony campaigns from within Salesforce.

The predictive dialler was developed from the autodialler. While the basic autodialler merely automatically dials telephone numbers for agents who are idle or waiting for a call, the predictive dialler uses a variety of algorithms to predict both the availability of agents and customers answering calls, adjusting the dialling process to the number of agents it anticipates will be available when the calls it places are expected to be answered.

In a similar way Maximise for Salesforce monitors the answers to the calls it places, detecting how the calls it makes are answered, and uses the information gathered to continue to place calls to agents at the correct times. As a result Maximise for Salesforce frees agents from listening to unanswered or unsuccessful calls, dramatically increasing the time each agent spends on communication rather than waiting for call connection. Using Maximise for Salesforce you can achieve an increase in talk time from twenty minutes in the hour to almost fifty minutes in the hour.

Maximise for Salesforce is a high performance engine ready to slot in to your Salesforce organisation to boost your outbound telesales, telemarketing and customer service team's performance. We automate dialling, connecting and updating of leads, contacts, cases, opportunities and more, so that your people can focus on doing what they do best - selling! Maximise is embedded directly into Salesforce to enable automatic seamless Calling List creation from any Salesforce campaign, offering preview, progressive and predictive dialling. Maximise for Salesforce supports answer machine handling and automatically updates Salesforce records to ensure that your data is always current. No telephony applets or toolbar are required it is a 100% web service.

Maximise for Salesforce, however, is more than just a *predictive* dialler. Maximise for Salesforce also provides two other dialling modes to be used:

- Open Preview dialling mode allows Maximise for Salesforce to deliver a screen pop of information to agents before a call, enabling them to familiarise themselves with the forthcoming campaign member details before the telephone number is dialled. When the agent ends the preview period the campaign member is dialled. In other words when running in Open Preview mode the agent is given full control over the speed at which calls are presented to them.
- Progressive dialling mode allows Maximise for Salesforce to deliver a screen pop of information to agents before a call, enabling them to familiarise themselves with the forthcoming campaign member details during the time it takes for the telephone number to be dialled and the call to connect. The agent is reserved for that call. The 5 to 15 seconds provided enables the agent to prepare themselves whilst still keeping productivity to a relatively high level.

All campaigns are initially created as predictive campaigns but can be changed later to open preview or progressive as suits your needs.

2. Maximise for Salesforce Installation

The following sections provide step-by-step information relating to the installation of Maximise for Salesforce into Salesforce. Installation consists of three steps:

- Installation of the Maximise for Salesforce package (see 2.1 Installation for details).
- Adding the Maximise and / or Maximise Administration tabs to Salesforce (see 2.2 Maximise for Salesforce Tabs for details).
- Creating your Maximise for Salesforce account (see 2.3 Maximise for Salesforce Account Provisioning for details).
- Configure Automatic Campaign Member Injection (see 2.4 Automatic Campaign Member for details).

2.1 Installation

Having found the Maximise for Salesforce listing within AppExchange follow the steps outlined below to install Maximise for Salesforce components.

TIP *This step only has to be completed once by the administrator for your entire Salesforce organisation.*

1. Select the **Get It Now** button within the Maximise for Salesforce AppExchange listing.

2. A dialog will be displayed in which you will be asked a series of questions (do you have a Salesforce account? are you a Salesforce system administrator? where would you like to try this app?) the answers to which will help the Salesforce AppExchange determine whether you are able to install Maximise for Salesforce and where you would like to install it.
   Answer each question in turn.

3. Presuming you are determined to be able to install Maximise for Salesforce you will eventually reach a 'Confirm Installation' page where you are required to signify your acceptance of the terms and conditions.
   Tick the **I have read and agree to the terms & conditions** checkbox before clicking the **Install** button to continue.
   TIP *Depending upon the answers given to the questions posed in step 2 you may also be asked to specify your login details so that Salesforce can authenticate your account prior to installation. Specify your Salesforce administrator username and password whenever asked.*

4. A 'Package Installation Details' page is displayed.
   Select the **Continue** button.

5. A 'Step1. Approve Package API Access' page is displayed.
   Select the **Next** button to continue.

6. A 'Step 2. Choose security level' page is displayed.
   Select the appropriate security setting level followed by the **Next** button.

7. A 'Step3. Install Package' page is displayed.
   Select the **Install** button.

8. When installation is complete an 'Install Complete' page is displayed.
   Select the **View Package Contents** button.

9. Finally a 'Package Details' page is displayed detailing the Maximise for Salesforce installation that has just completed.
   Maximise for Salesforce components have now been installed.

2.2 Maximise for Salesforce Tabs

Having installed the Maximise for Salesforce two new tabs are available to display within Salesforce, Maximise and Maximise Administration. Both tabs need to be added to Salesforce for each of your Salesforce users who you intend to be using Maximise for Salesforce.

- Salesforce users who will be handling calls (i.e. acting as Maximise for Salesforce agents) need to be able to access the Maximise tab.
- Salesforce users who will be administering Maximise for Salesforce (i.e. acting as Maximise for Salesforce administrators) need to be able to access both the Maximise tab and the Maximise Administration tab.

A Salesforce user can act as both a Maximise for Salesforce administrator and agent providing that they have the relevant Salesforce permissions to create campaigns and associate leads or contacts to the campaign.

On a per Salesforce user basis:

1. Select the **Setup** link within Salesforce (located at the top of the Salesforce page to the left of the **force.com apps** drop-down control). A vertical menu system of configuration options is displayed on the left hand side of the screen.

2. Expand the **My Personal Information** node in the **Personal Setup** vertical menu and select the **Change My Display** option.

   An alternative method to access the same functionality is to select the **Customize your tabs and related lists** link within the **My Personal Information** section of the main page.

3. Select the **Customize My Tabs** button.

4. Use your mouse and the <Ctrl> key on your keyboard to multi-select the **Maximise** and **Maximise Administration** tabs that are listed in the Available Tabs column.

5. Select the **Add** button to move the Maximise and Maximise Administration tabs from the Available Tabs column to the Selected Tabs column.

6. Use the **Up** and **Down** buttons to move the Maximise and Maximise Administration tabs to the appropriate position within the Selected Tabs column.

7. Select the **Save** button.

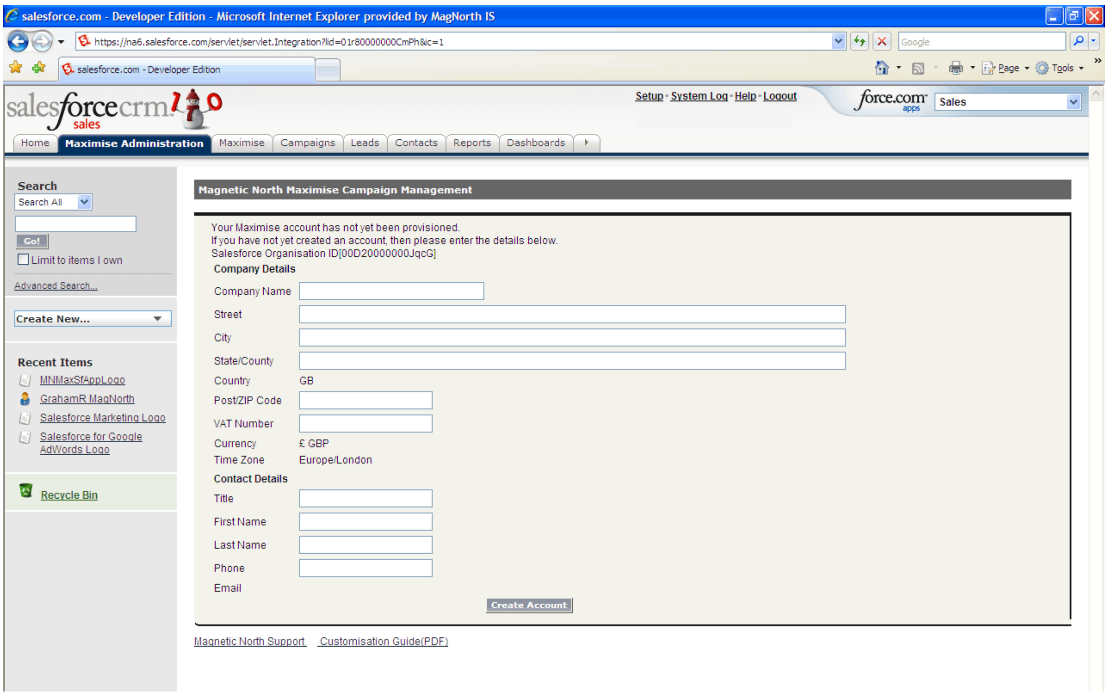
2.3 Maximise for Salesforce Account Provisioning

Having installed the Maximise for Salesforce components, AND having added the Maximise and Maximise Administration tabs to the accounts of the relevant members of your Salesforce organisation, a final two-stage step must be completed before your Maximise for Salesforce account is fully provisioned. The final steps are registering your organisation with Magnetic North Software and providing valid payment details to cover all call charges incurred whilst using Maximise for Salesforce.

TIP *This final account provisioning step only has to be completed once by the administrator for your entire Salesforce organisation.*

1. Select the **Maximise Administration** tab.

The first time that the Maximise Administration tab is selected an account provisioning form is displayed enabling you to create your Maximise for Salesforce account.



2. The majority of fields in the account details form are pre-populated using your Salesforce account details. Ensure that any empty fields are completed.

   Select the **Create Account** button to continue.

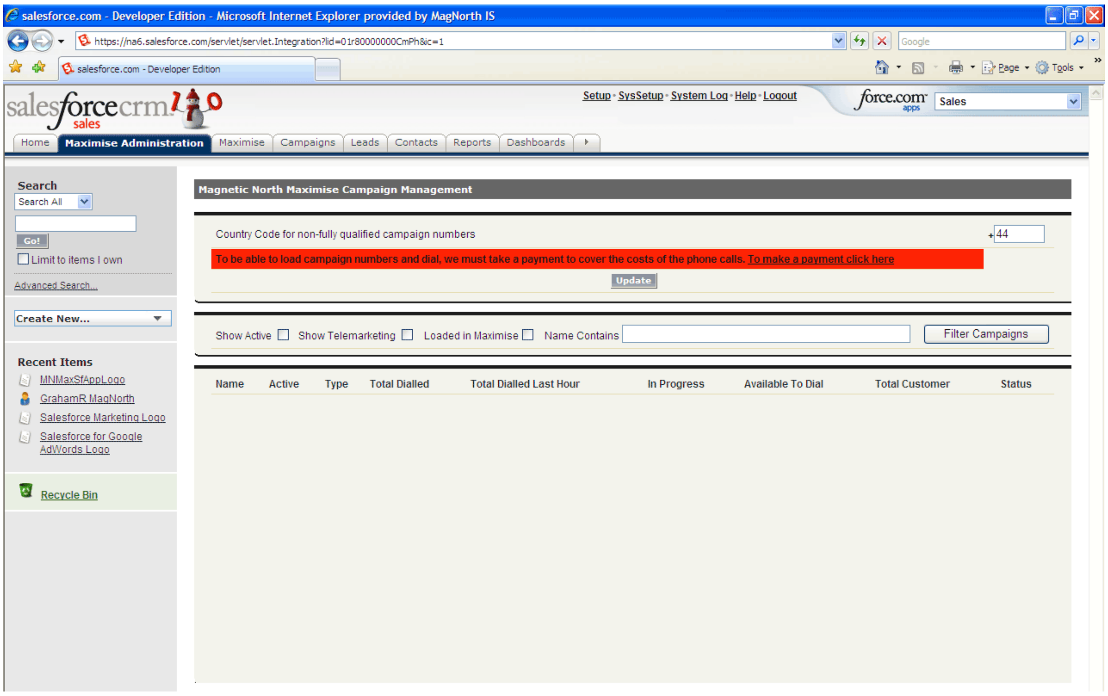
Providing account details allows Magnetic North Software to stay in touch and to send you invoices for all charges incurred whilst dialling with Maximise for Salesforce.

The second stage of Maximise for Salesforce account provisioning is to define the payment method you are authorising Magnetic North Software to charge call credit to (i.e. to cover all call charges incurred whilst dialling with Maximise for Salesforce). The initial payment is charged at 20 units of your currency allowing you the time to assess Maximise for Salesforce. In all cases, as an existing amount of calling credit is exhausted, your authorisation allows Magnetic North Software to top up calling credit in blocks of 250 units of your currency.

Your preferred payment method can be specified at any time, however, until you do so your automatically assigned *automatic number identification (ANI) / calling line ID (CLI)* that is displayed to campaign members will not be provided, nor will you be able to upload a calling list of campaign members to be dialled (and thus are prevented from dialling with Maximise for Salesforce) until valid payment details are provided. As a reminder to pay the Maximise Administration tab displays a red banner containing the following text and hyperlink:

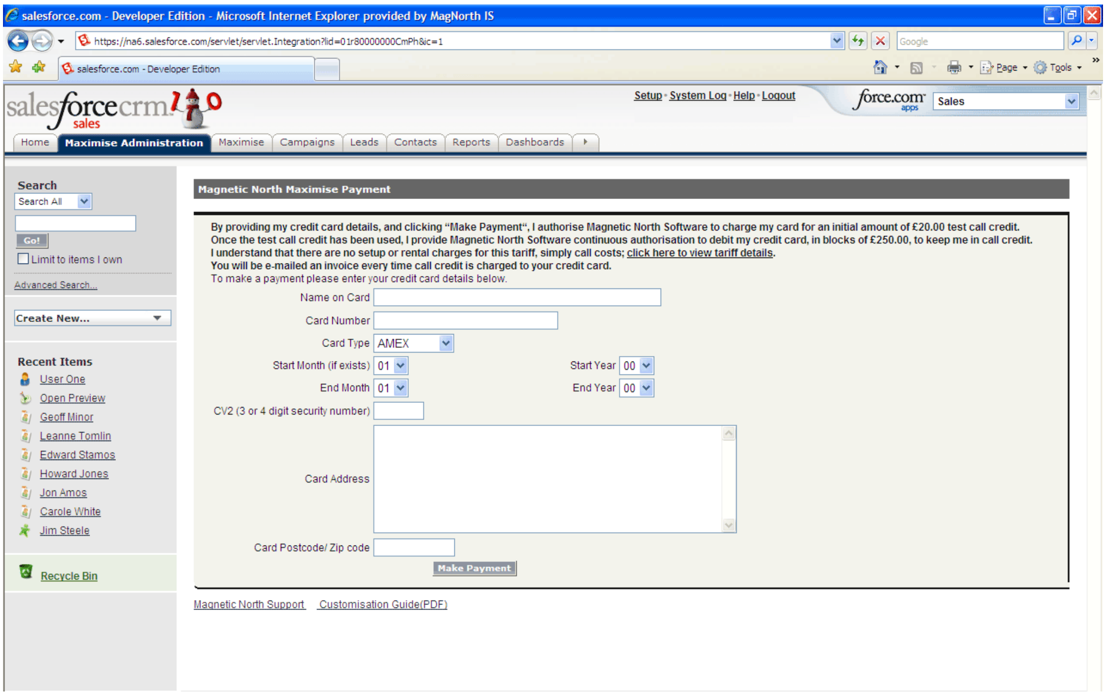
To be able to load campaign numbers and dial we must take a payment to cover the costs of the phone calls. To make a payment click here.

Simply click the underlined hyperlink to specify your choice of payment method and complete account provisioning.



3. Click the **To make a payment click here** link.

A payment details form is displayed enabling you to define your choice of payment method.



4. Complete all fields within the form.

   Select the **Make Payment** button to submit your payment details for authorisation.

A progress animation is displayed whilst authorisation occurs; DO NOT navigate away from the page until Maximise for Salesforce has informed you whether your payment attempt has succeeded or failed.

A Windows message dialog will inform you if your payment attempt fails; clicking **OK** within the dialog will dismiss the message and allow you to redefine any incorrect details before reattempting validation.

5. If your payment attempt can be authorised the functional restrictions that prevent you from dialling with Maximise for Salesforce are lifted. A message will confirm successful payment authorisation.
   Click the **Continue** button.

2.4 Automatic Campaign Member Update

Having installed Maximise for Salesforce, and having provisioned your account, the final changes that can be made to Salesforce are required for automatic campaign member updates to occur for Maximise for Salesforce campaigns. This is an entirely optional feature, not using automatic updates will mean you will have to continue to manually synchronise campaign members.

Maximise for Salesforce supports automatic campaign member updates whenever you make changes to the campaign members that have been associated with a campaign. Add, delete or change the status of campaign members and Salesforce will automatically push these changes to the Maximise for Salesforce dialler server, updating in real-time the calling list of members that Maximise for Salesforce will dial.

TIP *Note that due to a technical limitation the Automatic Campaign Member Update functionality will not automatically synchronise Campaign members with Maximise for Salesforce IF the Contacts / Leads have been associated with the Campaign using the* ***Campaigns > Manage Members > Add Members - Import File*** *functionality.*

To setup automatic campaign member update a Salesforce administrator must add a new trusted remote site to Salesforce AND execute an installation package URL (the package installs two apex classes, CampaignMemberChange & CampaignMemberChangeException, and an apex trigger, MemberUpdate).

2.4.1 Add a New Trusted Remote Site

To add a new trusted remote site to Salesforce:

1. Select the **Setup** link within Salesforce (located at the top of the Salesforce page to the left of the **force.com apps** drop-down control). A vertical menu system of configuration options is displayed on the left hand side of the screen.

2. Expand the **Security Controls** node in the **Administration Setup** vertical menu and select the **Remote Site Settings** option.

3. Click the **New Remote Site** button. A Remote Site Edit page is displayed

4. Use the **Remote Site Name** field to provide a name that is meaningful to you.

5. Use the **Remote Site URL** field to specify the URL of the Maximise for Salesforce server from which dialling occurs as:
   http://dial9.magneticnorth.com

6. Ensure that the **Disable Protocol Security** checkbox is ticked.

7. Use the **Description** field to specify a verbose description of the new trusted remote site that is meaningful to you.

8. Click the **Save** button.

2.4.2 Execute Class and Trigger Install Package

To execute the install package:

1. Login to Salesforce and select the **Maximise Administration** tab.

2. Select the **Click here to install Automatic Campaign Member Update package** link; this can be found below the four default configuration settings and the Update button.

3. The page loaded by the URL will require you to log into Salesforce using a Salesforce Administrator login.

4. A *Package Installation Details* page is displayed. Click the **Continue** button to continue.

5. A *Step 1. Approve Package API Access* page is displayed. Click the **Next** button to continue.

6. A *Step 2. Choose Security Level* page is displayed. Select the **Grant access to all users** radio button followed by clicking the **Next** button to continue.

7. A *Step 3. Install Package* page is displayed. Ensure that the **Ignore Apex test failures that may cause the installed application not to function properly** checkbox is ticked, followed by clicking the **Install** button.

8. Following a successful installation an *Install Complete* page is displayed. Optionally click the **View Package Contents** button to view details relating to the classes and trigger that have been installed.

9. Confirm that the package has installed:
   a. An Apex Class named *CampaignMemberChange*.
   b. An Apex Class named *CampaignMemberChangeException*.
   c. An Apex Trigger named *MemberUpdate*.

   TIP *To view Apex Classes select the **Setup** link within Salesforce (located at the top of the Salesforce page to the left of the **force.com apps** drop-down control). A vertical menu system of configuration options is displayed on the left hand side of the screen. Expand the **Develop** node in the **App Setup** vertical menu and select the **Apex Classes** option.*

TIP *To view Apex Triggers select the **Setup** link within Salesforce (located at the top of the Salesforce page to the left of the **force.com apps** drop-down control). A vertical menu system of configuration options is displayed on the left hand side of the screen. Expand the **Develop** node in the **App Setup** vertical menu and select the **Apex Triggers** option.*

3. Administering Maximise for Salesforce

Maximise for Salesforce uses the existing campaigns, contacts, leads and users business objects within Salesforce to create a Maximise for Salesforce predictive dialler campaign and associated calling list (i.e. the list of campaign member numbers to be dialled).

A number of steps have to be completed to ensure that Maximise is able to call the list of members (made up of contacts and / or leads) that have been associated with a campaign.

The following sections provide step-by-step guides to administering Maximise for Salesforce and creating a campaign so that Salesforce users are able to log into a Maximise for Salesforce campaign as agents and start handling the calls that are generated.

3.1 Pre Dialling – Configuring a Campaign

Making the assumption that Maximise for Salesforce has been installed, the Maximise for Salesforce account has been registered, and the initial call charges payment has been authorised, the flow of creating and configuring a Maximise for Salesforce campaign is as follows. Ensure that you follow the steps, in the order in which they are detailed, to configure your campaign.

1. Creating Salesforce users (see 3.1.1 Creating Salesforce Users for details).
2. Creating Salesforce campaigns (see 3.1.2 Creating Salesforce Campaigns for details).
3. Specify Maximise for Salesforce default values (see 3.1.3 Configuring Maximise for Salesforce Default Values for details).
4. Configure Maximise for Salesforce campaign running parameters (see 3.1.4 Configuring Campaign Running Parameters for details).
5. Synchronise Salesforce users with Maximise for Salesforce (see 3.1.5 Synchronising Salesforce Users with Maximise for Salesforce for details).
6. Associate Contacts and Leads as campaign members (see 3.1.6 Associating Contacts and Leads as Campaign Members for details).
7. Synchronise the campaign members with Maximise for Salesforce (see 3.1.7 Manually Synchronising Campaign Members with Maximise for Salesforce for details).

3.1.1 Creating Salesforce Users

The first step is to create Salesforce users. Ensure you have appropriate permissions within your Salesforce organisation to create users.

TIP *Skip this step if you already have existing Salesforce users who you are happy to act as Maximise for Salesforce agents.*

1. Select the Setup link within Salesforce (located at the top of the Salesforce page to the left of the force.com apps drop-down control). A vertical menu system of configuration options is displayed on the left hand side of the screen.
2. Expand the Manage Users node in the Administration Setup vertical menu and select the Users option.
3. Use the New User button, or the Add Multiple Users button, to create new users.
4. Fully specify your new Salesforce user(s) before selecting the Save button.
5. Repeat as necessary to create additional Salesforce users.

The Salesforce users created, or those that already exist, are the users who will be acting as Maximise for Salesforce agents and handling the calls that Maximise for Salesforce dials.

TIP *Should you add new Salesforce users remember to ensure they have access to the appropriate Maximise for Salesforce tabs.*

3.1.2 Creating Salesforce Campaigns

Step two is to create a Salesforce campaign. This is the campaign to which you will associate the members (contacts and leads) that Maximise for Salesforce will dial. Ensure you have appropriate permissions within your Salesforce organisation to create campaigns.

TIP *Skip this step if you already have existing Salesforce campaigns you are planning to use as Maximise for Salesforce campaigns.*

1. Select the **Campaigns** tab.
2. Select the **New** button.
3. Fully specify your new Salesforce campaign before selecting the **Save** button.
4. Repeat as necessary to create additional Salesforce campaigns.

3.1.3 Configuring Maximise for Salesforce Default Values & Task Updates

Maximise for Salesforce enables you to define a number of default values to be applied system wide. All default values are configured from the Maximise Administration tab and are grouped into two broad sections; default values and optionally specifying Task update user credentials.

3.1.3.1 Default Values

The third step is for an administrator to configure the Maximise for Salesforce default values using the Maximise Administration tab. This step only has to be completed once by an administrator for your entire Salesforce organisation. Four default values are required:

- An international country dialling code so that Maximise for Salesforce knows which international dialling code should be used to dial campaign members where the telephone numbers in their contact or lead records do not already include the full international dialling code.

- A default telephone number that you want your campaign members to be able to call you back on should they have any queries that relate to any of your campaigns. This can be changed on a per campaign basis (i.e. the number defined here will be used for all campaigns in which you have not configured an alternative call back number).
  TIP *The number you specify here is not the automatic number identification (ANI) / calling line ID (CLID) that is displayed to campaign members, that is automatically assigned to you. Rather, it is the number to which all calls made to the ANI / CLID displayed are redirected. As a reminder the Maximise Administration tab displays the redirect number within a red banner until you specify your choice of telephone number.*

- The unique ID of a Salesforce user so that all campaign calls that have a system outcome (i.e. those that are not passed to a human agent, such as busy/engaged, no answers, bad numbers etc.) can be logged as Tasks against that user to be followed up at a later date.

- Optionally select the custom Activity History field to which you want notes taken during a call to be written to. Should you decide not to specify an alternative custom field then default behaviour, namely, to continue to write notes to the Activity History 'Comments' field (referenced as the field name, 'Description', within the Maximise Administration tab as opposed to the field label 'Comments'). Should the default behaviour not suit your working practices specify an alternative custom Activity History field to which notes should be written; HOWEVER keep in mind that the length of a custom field is restricted to a maximum of 255 characters and so upon selection of an alternative field the notes will be truncated to only show the actual notes taken during the call, not the full call log details. For example, when using the default behaviour you will see notes with content similar to the following:

```
This call log was automatically created by Maximise for Salesforce. The Call
was to Josh Davis using phone number 00441204771315 . Salesforce ID
00v8000000QpqONAAZ. The outcome was Sent. Call Terminated: Jan 18 2010
6:58PM
by GrahamR@mn.com
Attached notes [Call. These are the actual notes taken during the call.]
```

When using a custom Activity History field you will see notes with content similar to the following:

```
Maximise Log:(Call. These are the actual notes taken during the call.)
```

When you specify a custom field Maximise for Salesforce attempts to validate your selection by writing to the specified field – if validation fails (i.e. the field is not of type textarea or does not have write access) then the default 'Comments' field will continue to be used and the default value is displayed within a red banner until you specify a valid custom field.
TIP *The custom Activity History field must be of type textarea and creatable (i.e. have write access) for Maximise for Salesforce to be able to validate it.*

1. Select the **Maximise Administration** tab and scroll down to the default values section.

2. Use the **Country Code for Non-fully Qualified Campaign Numbers** field to specify the appropriate country code; for example, 44 for the UK, 1 for the US.

3. Use the **Specify an Appropriate Telephone Number (Fully Qualified with Country Code e.g. for US 18662077007 or UK 44116 2292727)** field to specify the appropriate default call back telephone number to be used for all campaigns; for example 441161234567 for a UK number, 1123456789 for a US number.

4. Use the **Log calls that have a system outcome (i.e. not passed to a human agent, such as busy / no answer / bad number etc.) as Tasks against the following Salesforce User ID (e.g. 00580000001fO0Q)** field to specify the unique ID of the appropriate Salesforce user.
   TIP *The unique ID of a Salesforce user can be obtained from the URL for the page when you are viewing the appropriate user's record:*

   a. *Select the **Setup** link within Salesforce (located at the top of the Salesforce page to the left of the **force.com apps** drop-down control). A vertical menu system of configuration options is displayed on the left hand side of the screen.*
   b. *Expand the **Manage Users** node in the **Administration Setup** vertical menu and select the **Users** option. Select the appropriate user record.*
   c. *When the appropriate user record page has loaded the URL for the page will take the form of https://na6.salesforce.com/00580000001fO0Q?noredirect=1. The unique ID for the user is the part of the URL displayed in bold (i.e. the code after the final forward slash and before the question mark).*

5. Optionally use the **By default all call notes are written to the Activity History Comments field. Optionally change the default field to a custom Activity History field of your choice (the field must be of type textarea and have write access).** drop-down list to specify the alternative custom Activity History field to which you want call notes to be written. All existing custom Activity History fields are listed for selection.

6. Select the **Update** button to synchronise the default values with Maximise for Salesforce.

TIP *Notice that the Maximise Administration tab default values section also contains a link to the Automatic Campaign Member Update installation package. Please see 2.4 Automatic Campaign Member Update for details.*

3.1.3.2 Task Update User Credentials

Maximise for Salesforce writes details of all attempts to dial campaign members, and for calls that successfully connect to a campaign member any notes recorded by the Agent at the time of handling the call, as a Task. Tasks are listed in two places:

- In the Activity History section of the appropriate Campaign record.

- In the Activity History section of each appropriate campaign member Lead / Contact record.

Activity History provides you with a trail of all attempts made to dial campaign members, successful or otherwise. In previous releases of Maximise for Salesforce to be able to write Tasks an Agent had to have sufficient Salesforce permissions to do so. Depending upon your Salesforce organisation this may not be possible and so in that situation Maximise for Salesforce was unable to write call details to a Task and the paper trail of Activity History would be lacking.

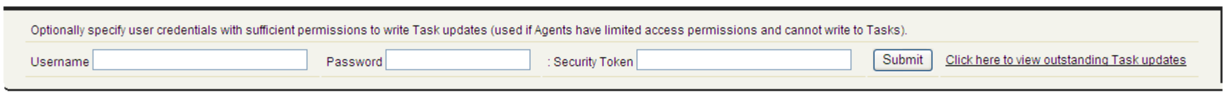
As a work around for users not having sufficient permissions the Maximise Administration tab now allows you to optionally specify the credentials of a Salesforce user who has sufficient permissions within the Salesforce organisation to update Tasks with call history details and any notes taken by the agent whilst handling a successfully connected call. These credentials are encrypted and stored securely and then used for all future Task updates.

TIP *If the Salesforce users you have selected to act as Maximise for Salesforce agents already have sufficient permissions to update Tasks then you do not have to specify any credentials.*

Additionally should you find yourself in the position of having Task updates that have already failed prior to providing the credentials of a suitable Salesforce administrator these can be viewed and either resubmitted, or deleted, using the *Click here to view outstanding Task updates* link. Where Task updates are resubmitted, providing you have specified credentials of an appropriate user with sufficient permissions, the updates will be written to the appropriate Campaign and Contact / Lead records; alternatively you can select to delete outstanding Task updates.

To define credentials of a Salesforce user who has sufficient permissions and can be used to update Tasks for all of your Maximise for Salesforce agents:

1. Select the **Maximise Administration** tab and scroll down to the task updates section.



2. Use the **Username** field to specify the Salesforce username of an appropriate user.

3. Use the **Password** field to specify the Salesforce password for the user.

4. Use the **Security Token** field to specify the Salesforce security token for the user.

   TIP *If you do not know the security token it can be reset and sent to the user from within Salesforce.*

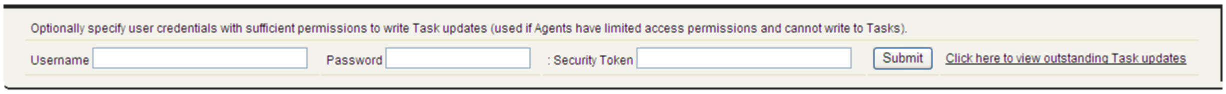
   *Ask the user to log into Salesforce. Select the **Setup** link within Salesforce (located at the top of the Salesforce page to the left of the **force.com apps** drop-down control). A vertical menu system of configuration options is displayed on the left hand side of the screen.*

   *Expand the **My Personal Information** node in the **Personal Setup** vertical menu and select the **Reset My Security Token** option. Follow on screen instructions.*

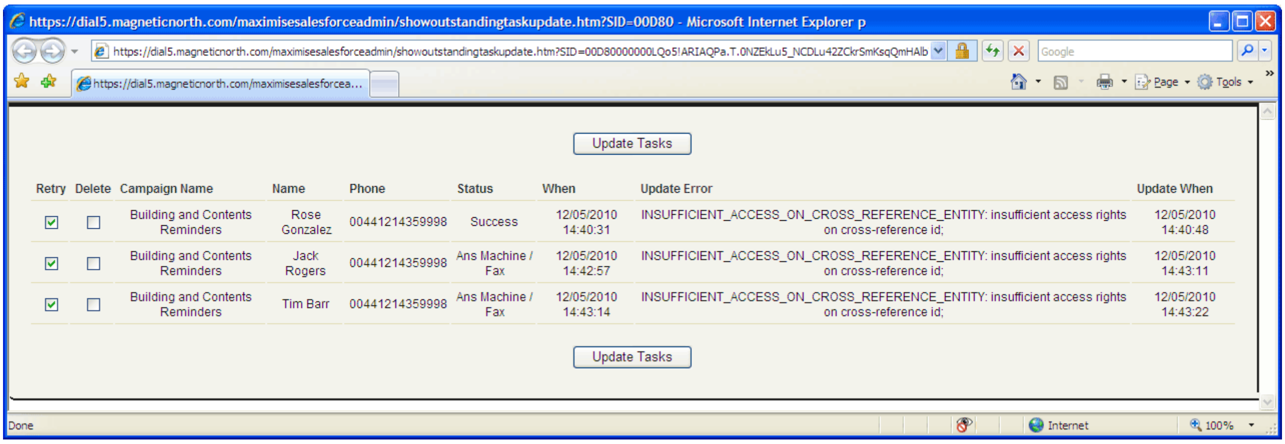
5. Click the **Submit** button to submit and store the details so that all future Task updates are completed using the permissions of this user.

To view and manage (i.e. resubmit or delete) any outstanding Task updates that have failed before you have specified the credentials of an appropriate Salesforce user with sufficient permissions to update Tasks:

1. Select the **Maximise Administration** tab and scroll down to the task updates section.



2. Click the **Click here to view outstanding Task updates** link. A secondary browser window is opened listing all outstanding task updates.



The following parameters are listed for each outstanding Task update:

Retry. An editable checkbox enabling you to select one, or multiple, outstanding Task updates to be resubmitted. Ensure that the appropriate checkboxes are ticked before clicking the *Update Tasks* button.

Delete. An editable checkbox enabling you to select one, or multiple, outstanding Task updates to be deleted. Ensure that the appropriate checkboxes are ticked before clicking the *Update Tasks* button.

Campaign Name. A read-only column detailing the name of the Campaign within which the Lead / Contact was called when the Task update failed.

Name. A read-only column detailing name of the Campaign member who was called when the Task update failed.

Phone. A read-only column detailing the phone number of the Campaign member who was being called, or was called, when the Task update failed.

Status. A read-only column detailing the status that was assigned to the call when the Task update failed.

When. A read-only column detailing when the call to the Campaign member took place.

Update Error. A read-only column detailing the error message for the failed Task update.

Update When. A read-only column detailing when the Task update failed.

Update Tasks. A button used to either resubmit, or delete, the outstanding Tasks that you have selected to resubmit or delete.

3. To resubmit Task updates ensure that the appropriate **Retry** checkboxes are ticked and click the **Update Tasks** button. The outstanding Task updates that have been selected will be written to the appropriate Campaign and Contact / Lead records.

4. To delete Task updates ensure that the appropriate **Delete** checkboxes are ticked and click the **Update Tasks** button. The outstanding Task updates that have been selected will be deleted.

5. When you have made all resubmissions or deletions simply close the secondary browser window.

3.1.4 Configuring Campaign Running Parameters

Maximise for Salesforce campaigns are all initially created alike using the same basic set of default running parameters on a per campaign basis; this default set of running parameters ensures your campaign runs at maximum efficiency as a predictive dialling mode campaign without any manual intervention on your part. However, once a campaign has been created you can optionally modify the running parameters to suit your needs for each campaign.

TIP *Making a change to campaign configuration requires a Maximise for Salesforce campaign to be restarted. When necessary, campaign restarts occur when you apply changes to campaign configuration using the **Update Campaign Settings** button. All agents who are currently logged into the campaign will be automatically logged out prior to the campaign restarting (those agents who are currently taking calls will be allowed to complete them before being logged out). When the campaign restarts please ask your agents to log back in so they can continue to field the calls that Maximise for Salesforce places.*

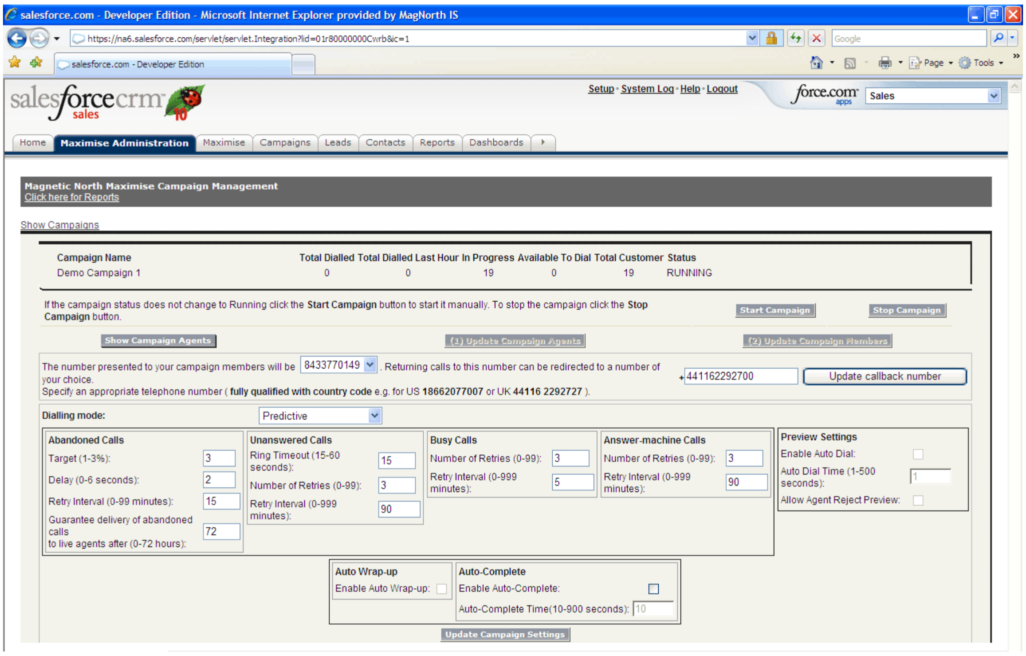
To change the running parameters of a campaign:

1. Select the **Maximise Administration** tab.

2. Select the appropriate campaign by clicking on its name.
   TIP *Should too many campaigns be listed use the filter bar embedded within the Maximise Administration tab to filter out those you are not interested in seeing. By ensuring a tick is placed in the appropriate checkbox, followed by selecting the Filter Campaigns button, you can filter out all campaigns that are not 'active' (Show Active), all campaigns that are not of type 'telemarketing' (Show Telemarketing) and all campaigns that are not already loaded into Maximise for Salesforce (Loaded in Maximise). The filter bar also enables you to filter by campaign name; enter an appropriate textual string to search for followed by the Filter Campaigns button.*

3. Having selected a campaign select the **Show Campaign Settings** button within the Maximise Administration tab.

4. The Maximise Administration tab expands to display the campaign configuration settings that when changed have a direct impact on how the campaign runs.



5. Make all appropriate changes to the configuration settings of the campaign (see the following pages for descriptions of the effects of each parameter). When you are satisfied with your changes select the **Update Campaign Settings** button to apply them.

The following parameters can be changed to alter how your campaigns run.

Update Callback Number. An editable field and a button enabling you to change the call back number from the default number defined whilst specifying Maximise for Salesforce default values, to one that is specific to this campaign, enabling you to utilise multiple call back numbers for different campaigns. If you do not specify an alternative then the default number is used.

Specify an appropriate call back telephone number for this campaign only; for example 441161234567 for a UK number, 1123456789 for a US number.

*TIP Do not forget to apply the change by clicking the **Update Callback Number** button after defining a campaign specific call back telephone number. You do not have to click the **Update Campaign Settings** button if this is the only campaign specific setting you are changing.*

Dialling Mode. A drop-down list enabling you to select the dialling mode to be used for the Maximise for Salesforce campaign. Changing the dialling mode of a campaign changes how Maximise for Salesforce offers the calls it dials to your agents.

TIP Making a change to the dialling mode requires a Maximise for Salesforce campaign to be restarted. Where necessary campaign restarts occur when you apply changes to campaign configuration using the Update Campaign Settings button. All agents who are currently logged into the campaign will be automatically logged out prior to the campaign restarting (those agents who are currently taking calls will be allowed to complete them before being logged out).

You can select from the following dialling modes:

Predictive – Predictive dialling mode uses algorithms to initiate the dialling of each outbound call based on anticipated agent availability as calculated based on campaign configuration and performance thus far. When set to dial in predictive mode campaign member telephone numbers are dialled automatically. When the call is answered it is presented to an available agent at the same time as the screen pop of member details. Predictive dialling mode results in the lowest agent wait time between calls, enabling your agents to field as many calls as possible in a defined period of time.

Open Preview – In open preview dialling mode agents receive a screen pop of information enabling them to familiarise themselves with the campaign member details before the telephone number is actually dialled. When the agent indicates they are ready (by selecting the *End Preview* button from the agent toolbar), or a period of preview time has passed equal to the value defined for the optional *Auto Dial Time* configuration setting, then the campaign member is dialled. Open preview dialling mode hands control of when each call is dialled to the agent and thus is the dialling mode best suited for training novice agents as they are not rushed into taking calls.

Progressive – When dialling using progressive mode agents receive a screen pop of information enabling them to familiarise themselves with campaign member details during which time the call is dialled. Approximately 5 to 15 seconds later (when the call connects) the call is presented to the agent who is now reserved for that particular call. Progressive dialling mode represents a middle ground between the efficient predictive dialling mode and the less efficient agent controlled open preview dialling mode.

The default dialling mode for all campaigns is predictive. Select the appropriate dialling mode for your Maximise for Salesforce campaign.

Abandoned Calls. A group of configuration settings relating to how Maximise for Salesforce should handle those calls that have been dialled but have to be abandoned as there is no agent available to present the call to. These settings are not relevant to open preview or progressive dialling mode campaigns.

Target. An editable field enabling you to define the target percentage by which Maximise for Salesforce should over dial within any 24 hour period.

Over dialling allows Maximise for Salesforce to best present calls to all logged in agents whilst leaving as few of them as possible waiting to be presented with their next call. However, over dialling can lead to calls being abandoned as there may be no agent available to present a call to. Regional laws define the maximum percentage of calls that can be abandoned within any 24 hour period (for instance, in the UK see OFCOM regulations).

This field is disabled for campaigns that are configured to use the open preview and progressive dialling modes.

The default abandoned call target is 3%. Enter an appropriate target between 1% and 3%.

Delay. An editable field enabling you to define the delay (in seconds) that you want to keep a campaign member waiting for, having already answered their telephone, before abandoning the call if Maximise for Salesforce has over dialled and there are no agents available. A shorter delay results in campaign members waiting for less time before the call they answered that cannot be presented to an agent is abandoned.

This field is disabled for campaigns that are configured to use the open preview and progressive dialling modes.

The default delay is 2 seconds. Enter an appropriate delay time between 0 and 6 seconds.

Retry Interval. An editable field enabling you to define the length of time (in minutes) after which Maximise for Salesforce will attempt to redial a call that has previously been abandoned.

This field is disabled for campaigns that are configured to use the open preview dialling mode.

The default retry interval is 15 minutes. Enter an appropriate retry interval between 0 (zero) and 999 minutes.

Guarantee Delivery of Abandoned Calls to Live Agents After. An editable field enabling you to specify the length of time within which you guarantee a call that has previously been abandoned will be delivered to a live agent.

If you are not bound by OFCOM operational rulings set this field value to 0 (zero). Where the field is set to zero Maximise for Salesforce bases the abandoned retry interval on the value defined in the *Abandoned Calls - Retry Interval* field. Where this field contains a non zero numerical figure the value defined in the *Abandoned Calls - Retry Interval* field is ignored.

This field is disabled for campaigns that are configured to use the open preview dialling mode.

The default period of time is 72 hours. Enter an appropriate period of time between 0 (zero) and 72 hours.

Unanswered Calls. A group of configuration settings relating to how Maximise for Salesforce should handle calls that remain unanswered by a campaign member. These settings are not relevant to open preview dialling mode campaigns.

Ring Timeout. An editable field enabling you to define the length of time (in seconds) that Maximise for Salesforce should continue to ring an unanswered call for.

This field is disabled for campaigns that are configured to use the open preview dialling mode.

The default ring timeout is 15 seconds. Enter an appropriate ring timeout between 15 and 60 seconds.

Number of Retries. An editable field enabling you to define the number of times that Maximise for Salesforce should attempt to retry dialling an unanswered call.

This field is disabled for campaigns that are configured to use the open preview dialling mode.

The default number of retries is 3. Enter an appropriate number of retries between 0 (zero) and 99.

TIP *It is the combination of Number of Retries and Retry Interval that define the retry strategy that Maximise for Salesforce employs for unanswered calls.*

Retry Interval. An editable field enabling you to define the time (in minutes) after which Maximise for Salesforce should attempt to redial an unanswered call.

This field is disabled for campaigns that are configured to use the open preview dialling mode.

The default retry interval is 90 minutes. Enter an appropriate retry interval between 0 (zero) and 999 minutes.

TIP *It is the combination of Number of Retries and Retry Interval that define the retry strategy that Maximise for Salesforce employs for unanswered calls.*

Busy Calls. A group of configuration settings relating to how Maximise for Salesforce should handle calls to telephone numbers that result in a busy (engaged) tone. These settings are not relevant to open preview dialling mode campaigns.

Number of Retries. An editable field enabling you to define the number of times that Maximise for Salesforce should attempt to redial a call that has resulted in a busy (engaged) tone.

This field is disabled for campaigns that are configured to use the open preview dialling mode.

The default number of retries is 3. Enter an appropriate retry interval between 0 (zero) and 99.

TIP *It is the combination of Number of Retries and Retry Interval that define the retry strategy that Maximise for Salesforce employs for busy calls.*

Retry Interval. An editable field enabling you to define the time (in minutes) after which Maximise for Salesforce should attempt to redial a call that has resulted in a busy (engaged) tone.

This field is disabled for campaigns that are configured to use the open preview dialling mode.

The default retry interval is 5 minutes. Enter an appropriate retry interval between 0 (zero) and 999 minutes.

TIP *It is the combination of Number of Retries and Retry Interval that define the retry strategy that Maximise for Salesforce employs for busy calls.*

Answer Machine Calls. A group of configuration settings relating to how Maximise for Salesforce should handle calls to telephone numbers that have connected to an answer machine. These settings are not relevant to open preview dialling mode campaigns.

Number of Retries. An editable field enabling you to define the number of times that Maximise for Salesforce should attempt to redial a call that has connected to an answer machine.

This field is disabled for campaigns that are configured to use the open preview dialling mode.

The default number of retries is 3. Enter an appropriate retry interval between 0 (zero) and 99.

TIP *It is the combination of Number of Retries and Retry Interval that define the retry strategy that Maximise for Salesforce employs for answer machine calls.*

Retry Interval. An editable field enabling you to define the time (in minutes) after which Maximise for Salesforce should attempt to redial a call that has connected to an answer machine.

This field is disabled for campaigns that are configured to use the open preview dialling mode.

The default retry interval is 90 minutes. Enter an appropriate retry interval between 0 (zero) and 999 minutes.

TIP *It is the combination of Number of Retries and Retry Interval that define the retry strategy that Maximise for Salesforce employs for answer machine calls.*

Preview Settings. A group of configuration settings that only relate to campaigns that have been configured to use open preview dialling mode. These settings are not relevant to progressive and predictive dialling mode campaigns.

Enable Auto Dial. A checkbox enabling you to specify that agents may only preview a call for a limited predefined amount of time (in seconds) before the call is automatically dialled and, when answered, automatically presented to the agent.

Where this setting is disabled agents have two choices, either to preview member details for as long as is required before manually ending the preview period and accepting the call, or rejecting the call during the preview period in which case the call is offered to an alternative agent and the original agent is offered a following call to preview.

This checkbox is disabled for campaigns that are configured to use the predictive and progressive dialling modes.

The default setting for this checkbox is disabled. Ensure that the checkbox is ticked to enable automatic dialling after the predefined amount of time has passed.

Auto Dial Time. An editable field enabling you to define the limited amount of time (in seconds) that agents are able to preview member details for before Maximise for Salesforce will automatically dial and present the call to the agent.

This field is disabled for campaigns that are configured to use the predictive and progressive dialling modes.

The default auto dial time is 1 second. Enter an appropriate auto dial time between 1 and 500 seconds.

Allow Agent Reject Preview. A checkbox enabling you to specify that agents should be able to cancel a call whilst previewing member details. When enabled a Cancel Preview button is displayed in the agent sidebar enabling a call to be cancelled during the preview period. Calls that are cancelled during preview are redirected to alternative agents and are only re-presented to the original agent if they have since logged out of, and back into, the campaign.

This checkbox is disabled for campaigns that are configured to use the predictive and progressive dialling modes.

The default setting for this checkbox is disabled. Ensure that the checkbox is ticked to allow agents to cancel a call during the preview period.

Auto Wrap Up. A configuration setting that relates to how Maximise for Salesforce should handle the wrap up period that an agent optionally enters after a call has completed.

Enable Auto Wrap Up. A checkbox enabling you to define that when your telephony hardware reports that a call has been completed (for instance, the call is hung up) then the agent handling the call is automatically placed into a period of wrap up (i.e. in this situation wrap up is no longer optional). You can use *Auto Wrap Up* in combination with *Auto Complete* to ensure that all your agents enter wrap up, but only for a limited time, when hardware reports a call as being complete. The default setting for this checkbox is disabled. Ensure that checkbox is ticked if you want to enable automatic wrap up for calls that your telephony hardware reports have been completed.

NOTE The Enable Auto Wrap Up checkbox is currently disabled for use.

Auto Complete. A group of configuration settings that relate to how Maximise for Salesforce should handle automatic completion of the wrap up period that an agent has requested.

Enable Auto Complete. A checkbox enabling you to specify that automatic wrap up completion should be enabled. Automatic wrap up completion allows you to force agents out of a wrap up period after a predefined length of time has passed.

The default setting for this checkbox is disabled (i.e. agents enter and exit wrap up as they see fit). Ensure that the checkbox is ticked if you want to enable automatic wrap up completion.

Auto Complete Time. An editable field enabling you to define the length of time (in seconds) after which agents are forced out of the wrap up period they have entered when *Enable Auto Complete* is enabled.

The default automatic wrap up completion time is 10 seconds. Enter an appropriate automatic wrap up completion time between 10 and 900 seconds.

3.1.5 Synchronising Salesforce Users with Maximise for Salesforce

The next step is to synchronise your Salesforce users with Maximise for Salesforce so that they are recognised as Maximise for Salesforce agents. You must perform this step at least once for every campaign that you want Maximise for Salesforce to dial the members of.

1. Select the **Maximise Administration** tab. All existing Salesforce campaigns are listed for selection.

2. Select the appropriate campaign by clicking on its name.
   TIP *Should too many campaigns be listed use the filter bar embedded within the Maximise Administration tab to filter out those you are not interested in seeing. By ensuring a tick is placed in the appropriate checkbox, followed by selecting the Filter Campaigns button, you can filter out all campaigns that are not 'active' (Show Active), all campaigns that are not of type 'telemarketing' (Show Telemarketing) and all campaigns that are not already loaded into Maximise for Salesforce (Loaded in Maximise). The filter bar also enables you to filter by campaign name; enter an appropriate textual string to search for followed by the Filter Campaigns button.*

3. Having selected a campaign a list of your Salesforce users is displayed. Tick the checkbox for each Salesforce user that you want to act as a Maximise for Salesforce agent.

   Select the **(1) Update Campaign Agents** button within the Maximise Administration tab.

Upon selecting the Update Campaign Agents button the selected Salesforce users are assigned to the campaign which in turn allows them to log into the Maximise for Salesforce sidebar within the Maximise tab. At the same time Maximise for Salesforce standard call outcomes are merged with any user defined member status values (see 3.2 Pre Dialling – Adding User Defined Member Status Values) you have created within Salesforce making them all visible as statuses within Salesforce. Finally, the Maximise for Salesforce 'Not Dialled' call outcome is assigned as the default member status value.

TIP *Salesforce users can be Maximise for Salesforce agents in multiple campaigns but can only ever log into one campaign via the Maximise sidebar.*

3.1.6 Associating Contacts and Leads as Campaign Members

The penultimate step before Maximise for Salesforce can begin dialling is to associate Contacts and / or Leads as campaign members (i.e. the customers that Maximise for Salesforce will dial).

1. Select the **Campaigns** tab.

2. Select the appropriate campaign by clicking on the campaign name.

3. Select the **Manage Members** button to expand the drop-down options. To associate members with the campaign from your existing Salesforce contacts or leads select the **Add Members – Search** option.
   TIP *Note that if you have configured Automatic Campaign Member Update then due to a technical limitation it will not automatically synchronise Campaign members if the Contacts / Leads have been associated with the Campaign using the* ***Manage Members > Add Members - Import File*** *functionality.*

4. A Manage Members dialog is displayed consisting of two tabs, *Add Members* and *Existing Members*. Use the **Add Members** tab to define filter criteria that will return the relevant sample of leads or contacts to be associated as campaign members.

   a. In *Step1: Choose Member Type to Search* select either the **Leads** or **Contacts** radio button to specify you want to add from Salesforce contacts or leads.

   b. In *Step2: Specify Filter Criteria* use a combination of **Field**, **Operator** and **Value** to return a sample of leads or contacts from which you want to associate campaign members.
      TIP *Where you have a large list of contacts / leads but do not wish to associate every one of them with your campaign it can be inefficient to scroll through the entire list to find only those that you are really interested in. In this situation a Salesforce 'view' can be created to display a smaller sample of all Contacts based on the filter criteria you specify when creating the view. Follow the link for more information on Salesforce Custom List Views.*

   c. Select the **Go!** button to submit your query and search for the sample of matching leads or contacts.

   d. When the matching sample is returned tick the selection checkbox of each lead or contact that you want to associate as campaign members.

   e. Select the **Add With Status** button to expand the drop-down options.

   f. Select **Not Dialled** from the list. All ticked leads or contacts are associated as campaign members with the status of Not Dialled. Not Dialled is a Maximise status that indicates the member should be dialled.

5. The *Existing Members* tab is displayed detailing the leads or contacts who have been associated with the campaign as campaign members.

The telephone numbers of all campaign members are the numbers that Maximise for Salesforce will dial.

- The telephone number labelled as ‘Phone’ is used as the first number that Maximise for Salesforce will dial in an attempt to reach the Member.
- The number labelled ‘Mobile’ is used as the second number.
- The number labelled ‘Home Phone’ as the third.

TIP *All member telephone numbers must include the full international country dialling code.*

If you are using an existing Salesforce campaign that has an existing member list, instead of a new campaign with a new member list, you will need to manually update the status of all associated members to the ‘Not Dialled’ status. Follow the steps outlined below:

1. Select the **Campaigns** tab.
2. Select the appropriate campaign by clicking on the campaign name.
3. Select the **Manage Members** button to expand the drop-down options. To associate members with the campaign from your existing Salesforce contacts or leads select the **Edit Members – Search** option.
   TIP *Note that if you have configured Automatic Campaign Member Update then due to a technical limitation it will not automatically synchronise Campaign members if the Contacts / Leads have been associated with the Campaign using the **Manage Members > Add Members - Import File** functionality.*
4. A Manage Members dialog is displayed consisting of two tabs, *Add Members* and *Existing Members*. Use the **Existing Members** tab to change the status of existing campaign members.
   a. Tick the selection checkbox of each existing lead or contact that you want to change the status of.
   b. Select the **Update Status** button to expand the drop-down options.
   c. Select **Not Dialled** from the list. The status of all ticked leads or contacts is changed to Not Dialled. Not Dialled is a Maximise status that indicates the member should be dialled.
5. The *Existing Members* tab is displayed detailing the leads or contacts and their new Not Dialled status.

3.1.7 Manually Synchronising Campaign Members with Maximise for Salesforce

TIP *If you have configured Maximise for Salesforce for automatic campaign member updates (see 2.4 Automatic Campaign Member for details) then as you add, or remove, members to / from your Maximise for Salesforce campaigns these changes will be automatically pushed to the Maximise for Salesforce dialler server.*

If you have not configured Salesforce for automatic campaign member insertion then the final step before Maximise for Salesforce agents can log into the Maximise for Salesforce sidebar and start handling the dialled calls is to manually synchronise the campaign members with Maximise for Salesforce. This step allows Maximise for Salesforce to build the calling list of numbers that should be dialled.

TIP *You must have synchronised your Salesforce users as Maximise for Salesforce agents using the **(1) Update Campaign Agents** button before you are able to synchronise your campaign members with Maximise for Salesforce. This is an operational restriction put in place to ensure that a campaign has been created and agents have been defined before this final step occurs.*

1. Select the **Maximise Administration** tab.

2. Select the appropriate campaign by clicking on the campaign name.

   TIP *Should too many campaigns be listed use the filter bar embedded within the Maximise Administration tab to filter out those you are not interested in seeing. By ensuring a tick is placed in the appropriate checkbox, followed by selecting the Filter Campaigns button, you can filter out all campaigns that are not 'active' (Show Active), all campaigns that are not of type 'telemarketing' (Show Telemarketing) and all campaigns that are not already loaded into Maximise for Salesforce (Loaded in Maximise). The filter bar also enables you to filter by campaign name; enter an appropriate textual string to search for followed by the Filter Campaigns button.*

3. Select the **(2) Update Campaign Members** button.

   TIP *If you have not yet specified your choice of payment method to cover call charges the functional restriction will still be in place and you will be unable to press the button and upload a calling list of campaign members to be dialled, and thus prevented from dialling with Maximise for Salesforce. As a reminder the Maximise Administration tab displays a red banner containing payment reminder text and a hyperlink to the payment form. Simply provide valid payment details that can be authorised to remove the functional restriction.*

This assigns the members that have been associated with a campaign as the calling list of telephone numbers that Maximise for Salesforce will dial.

3.1.8 Campaign Configuration Complete

Maximise for Salesforce campaigns are always running, your Salesforce users (i.e. those users assigned as Maximise for Salesforce agents) only need log into the Maximise for Salesforce sidebar via the Maximise tab to start handling the dialled calls (see 4 Maximise for Salesforce Agents Handling Campaign Calls for details).

3.2 Pre Dialling – Adding User Defined Member Status Values

Member status values (known as call outcomes in Maximise for Salesforce) enable your Salesforce users (i.e. Maximise for Salesforce agents) to assign an outcome to a call when they complete it.

A number of standard Maximise for Salesforce call outcomes are provided but they may not entirely satisfy your needs. Follow the steps outlined below to create additional user defined member status values and synchronise them with Maximise for Salesforce:

1. Select the **Campaigns** tab.
2. Select the appropriate campaign by clicking on the campaign name.
3. Select the **Advanced Setup** button. A list of existing Member Status Values that are associated with this campaign are displayed.
4. Select the **Edit** button.
5. Click the **Add More** link found at the bottom of the list of now editable member status values.
6. Define a name for the custom member status value.
7. If you want Salesforce to consider the custom member status value as a positive value when included within any reports ensure that the **Responded** checkbox sitting to the right of the new value is ticked.

   If you want Salesforce to consider the custom member status value as a negative value when included within any reports ensure that the **Responded** checkbox sitting to the right of the new value is not ticked.
8. Select the **Save** button.
9. Repeat steps 5 and 6 as necessary until you have created all relevant user defined custom call outcomes.

With all user defined custom call outcomes defined the final step is to update the campaign so that the outcomes can be propagated through the system and be assigned by the Salesforce users who are acting as Maximise for Salesforce agents.

10. Select the **Maximise Administration** tab. All existing campaigns are listed for selection.
11. Select the appropriate campaign by clicking on its name.

Having selected a campaign a list of your Salesforce users is displayed. Some will be ticked (i.e. assigned as Maximise for Salesforce agents); some will not be ticked (i.e. not assigned as Maximise for Salesforce agents).

12. Select the **Update Campaign Agents** button to synchronise all Salesforce member status values (both standard and user defined) with the Maximise for Salesforce system call outcomes.

3.3 Pre / During Dialling – Manually Starting or Stopping a Campaign

Maximise for Salesforce has been designed to start campaigns automatically after you have synchronised Salesforce users as agents (for more details see 3.1.5 Synchronising Salesforce Users with Maximise for Salesforce) and campaign members as the list of contacts to be called (for more details see 3.1.7 Manually Synchronising Campaign Members with Maximise for Salesforce). Additionally all campaigns are configured to run for a year from the day they are started, after which the campaign will automatically stop.

However, there may be a need to start or stop a campaign manually, for example, if a campaign does not start automatically it can be started manually, alternatively you may have a need to stop a campaign mid way through dialling a list of campaign members.

1. Select the **Maximise Administration** tab. All existing campaigns are listed for selection.

2. Select the appropriate campaign by clicking on its name.

Having selected a campaign a list of your Salesforce users is displayed. Some will be ticked (i.e. assigned as Maximise for Salesforce agents); some will not be ticked (i.e. not assigned as Maximise for Salesforce agents). To manually start a campaign that is currently stopped:

3. Select the **Start Campaign** button to manually start the campaign. If the campaign cannot be started an error message is displayed to help you diagnose any problems.
   TIP *To start a campaign manually you must have already synchronised Salesforce users as agents, and campaign members as the list of contacts to be called.*

To manually stop a campaign that is currently running:

4. Select the **Stop Campaign** button to manually stop the campaign.

3.4 During Dialling – Adding Additional Members to the Maximise for Salesforce Calling List

You can add additional members (Contacts or Leads) to a campaign at any time within Salesforce. If you have configured Maximise for Salesforce for automatic campaign member updates (see 2.4 Automatic Campaign Member for details) then as you add, or remove, members to or from your Maximise for Salesforce campaigns these changes will be automatically pushed to the Maximise for Salesforce dialler server.

If you have not configured Salesforce for automatic campaign member insertion then in order to refresh the Maximise for Salesforce calling list with the recently added member records you need to:

1. Select the **Maximise Administration** tab. All existing Salesforce campaigns are listed for selection.

2. Select the appropriate campaign by clicking on the campaign name.
   TIP *Should too many campaigns be listed use the filter bar embedded within the Maximise Administration tab to filter out those you are not interested in seeing. By ensuring a tick is placed in the appropriate checkbox, followed by selecting the Filter Campaigns button, you can filter out all campaigns that are not 'active' (Show Active), all campaigns that are not of type 'telemarketing' (Show Telemarketing) and all campaigns that are not already loaded into Maximise for Salesforce (Loaded in Maximise). The filter bar also enables you to filter by campaign name; enter an appropriate textual string to search for followed by the Filter Campaigns button.*

3. Select the **Update Campaign Members** button.

At this point all members that have recently been associated with the campaign are added to the Maximise for Salesforce calling list so that they are dialled as part of the campaign.

3.5 Post Dialling – Resetting the Status of Dialled Members: Re-Dial & Do Not Dial

When Maximise for Salesforce finishes dialling the telephone numbers of members associated with a campaign you may find that you need to reset the status of certain members so that they can be redialled, or during dialling a campaign member may ask that you stop calling them.

To reset campaign members so that they can be redialled use the 'Re-Dial' state:

1. Select the **Campaigns** tab.

2. Select the appropriate campaign by clicking on its name.

3. Select the **Manage Members** button to expand the drop-down options. To reset member statuses select the **Edit Members – Search** option.

4. A Manage Members dialog is displayed consisting of two tabs, *Add Members* and *Existing Members*. Select the **Existing Members** tab.

5. The campaign members who are currently associated with the campaign are listed, included within the details of each is the current member status.

    a. Ensure that the checkbox is ticked for every campaign member that you want to reset the campaign status of to 'Re-Dial'.
    b. Select the **Update Status** button to expand the drop-down options.
    c. Select **Re-Dial** from the list of options. The campaign status of all ticked campaign members is reset to 'Re-Dial' allowing Maximise for Salesforce to redial them.

To stop Maximise for Salesforce from dialling campaign members use the 'Do Not Dial' state:

1. Select the **Campaigns** tab.

2. Select the appropriate campaign by clicking on its name.

3. Select the **Manage Members** button to expand the drop-down options. To reset member statuses select the **Edit Members – Search** option.

4. A Manage Members dialog is displayed consisting of two tabs, *Add Members* and *Existing Members*. Select the **Existing Members** tab.

5. The campaign members who are currently associated with the campaign are listed, included within the details of each is the current member status.

a. Ensure that the checkbox is ticked for every campaign member that you want to reset the campaign status of to ‘Do Not Dial’.
b. Select the **Update Status** button to expand the drop-down options.
c. Select **Do Not Dial** from the list of options. The campaign status of all ticked campaign members is reset to ‘Do Not Dial’ preventing Maximise for Salesforce from dialling them.

3.6 Post Dialling – Generating Maximise for Salesforce Reports & Viewing Dashboards

A number of custom reports and dashboards are installed with Maximise for Salesforce that enable you to generate and view statistical analysis of your campaigns. A dashboard is a group of graphical components that display the data collated by a Salesforce report, providing an easy to read graphical real-time snapshot of your report data.

TIP *An administrator must be assigned as an agent to a campaign before they are able to view dashboard statistics on that campaign. Where an administrator is not assigned as an agent to a campaign they will not be able to select the campaign for the dashboard to focus on and return statistical analysis for.*

3.6.1 Generating Maximise for Salesforce Reports

To generate Maximise for Salesforce reports:

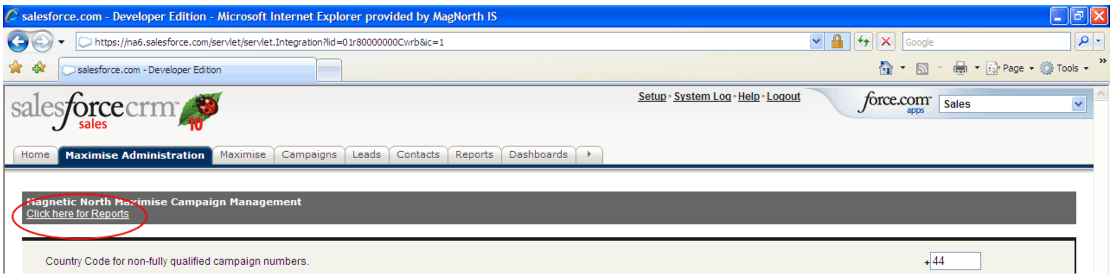
1. Select the **Reports** tab.
2. Select the **Maximise Reports** option from the drop-down list within the Report Folders section below your list of Salesforce tabs.
3. Select the **Go!** button. A list of the Maximise for Salesforce custom reports is displayed.
4. Select the appropriate report by clicking on its name.
5. A report generation page is displayed from which you have a number of options.
   Firstly the page shows the generated report based on the default report options (typically, all campaigns). Additionally the page enables you to define a report generation schedule, change the default report options so that you can define which campaigns you want to be analysed, or to customise the report content.
   Should you need to generate a report for a campaign, or campaigns, outside of the default report options:
   a. Use the **Summarize Information By**, **View** and **Select Campaign** fields to change the default report options.
   b. Select the **Run Report** button to re-generate the report based on the changed report options.
   c. Select the **Save** button to save changes you have made to the report.

3.6.2 Generating the Maximise for Salesforce Agent Performance Statistical Report

Agent performance statistical reporting has been added to Maximise for Salesforce, although not from the Reports tab as other reports, rather from the Maximise Administration tab. As a result the agent performance statistical report can only be generated by users who have appropriate permissions to view the Maximise Administration tab. The report enables you to analyse working statistics for agents across a specified range of time for all, or for a specific selection of, agents and for all, or for a specific, campaign. Details included in the report include:

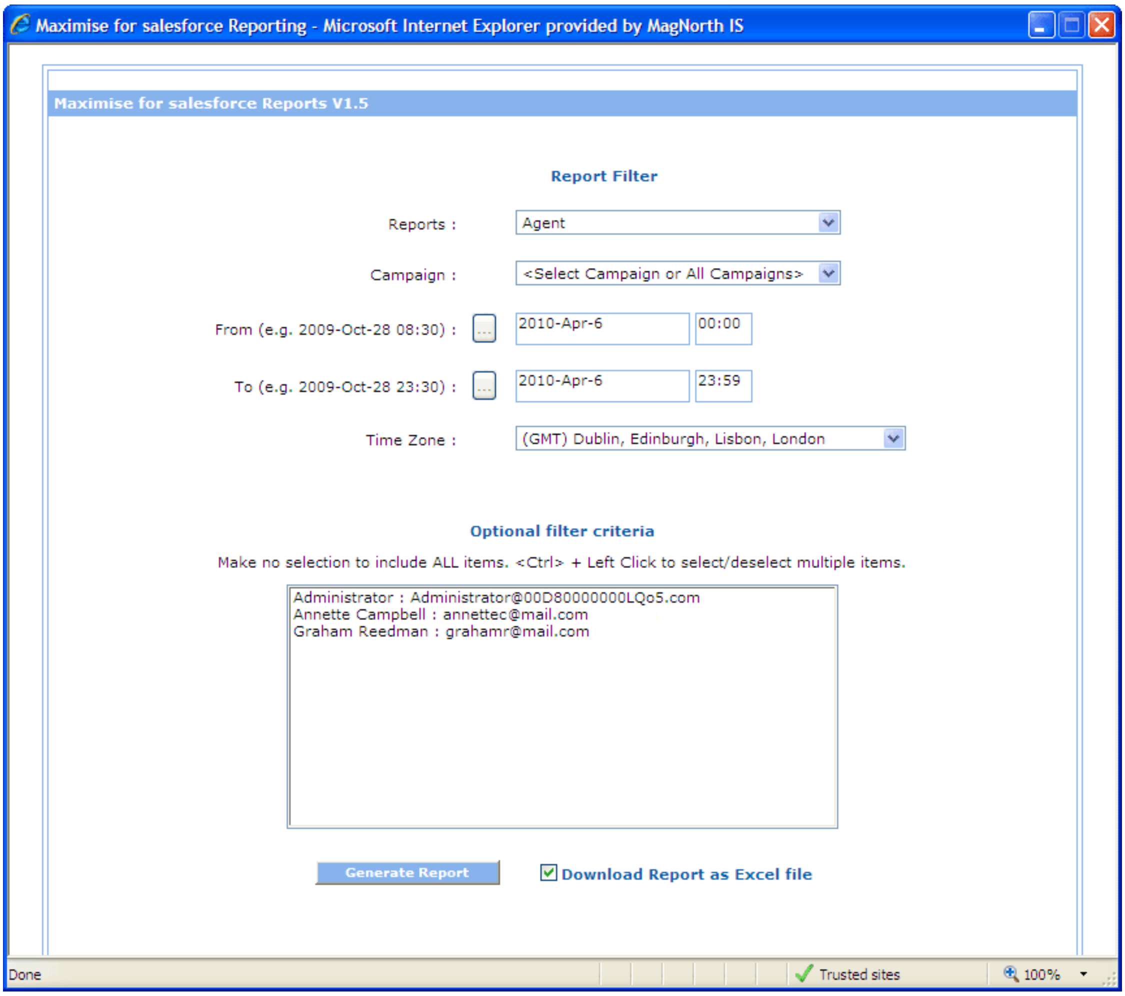
- The agent full name.
- The total time spent logged on (measured in seconds) during the specified range of time.
- The total time spent in a ready state (measured in seconds) during the specified range of time.
- The total time spent in a wrap state (measured in seconds) during the specified range of time.
- The total time spent in a talking state (measured in seconds) during the specified range of time.
- The total time spent in a not ready state (measured in seconds) during the specified range of time.
- The average talk time per call (measured in seconds) during the specified range of time.
- The total number of calls handled by the agent during the range of time.
- The total number of calls completed with what is considered to be a success outcome during the range of time.

When you select the Maximise Administration tab a *Click here for Reports* hyperlink is displayed beneath the Magnetic North Maximise Campaign Management header.



The hyperlink is available regardless of whether you are viewing the initial all campaigns view of the Maximise Administration tab, or if you have drilled down and selected a specific campaign.

Having selected the hyperlink a secondary browser window launches containing a Salesforce Agent Report dialog enabling you to specify the filter criteria required for the report.



The report filter dialog provides the following options to define the filter criteria of the report to be generated:

Reports. An editable drop-down control enabling you to select the report to generate. At present only one report is available, the agent performance statistical report named ‘Agent’.

The drop-down control defaults to selecting Agent.

Campaign. An editable drop-down control enabling you to select a campaign, or to select all campaigns, to focus the report on. To focus the report on a single campaign select it from those listed. To focus the report on all campaigns do not select any from those listed.

The drop-down control defaults to selecting all campaigns.

From. A pair of editable date and time selection controls enabling you to specify the starting day / time of the range of time upon which you want to report.

Date and time can be specified by selecting the **...** button to access a date, time and time zone picker, or, by manually typing the appropriate date and time into the editable fields. If you choose to type directly into the editable fields:

- Ensure that the date is specified as YYYY-MMM-DD where MMM is a three letter abbreviation of the month as follows: January as 'Jan', February as 'Feb', March as 'Mar', April as 'Apr', May as 'May', June as 'Jun', July as Jul', August as 'Aug', September as 'Sep', October as 'Oct', November as 'Nov' and December as 'Dec'); for example, November 3rd 2010 would be entered as 2010-Nov-3 and June 15th 2010 as 2010-Jun-15.
- Ensure that the time is specified using 24 hour clock notation (hh:mm) using a colon to separate the hh and the mm portions of the time; for example 23:59.
  If left untouched the controls default the date and time to 00:00 and today's date.

  TIP *Note that the safest way to ensure date and time is entered using the correct format is to use the date and time picker.*

To. A pair of editable date and time selection controls enabling you to specify the end day / time of the range of time upon which you want to report.

Date and time can be specified by selecting the **...** button to access a date, time and time zone picker, or, by manually typing the appropriate date and time into the editable fields. If you choose to type directly into the editable fields:

- Ensure that the date is specified as YYYY-MMM-DD where MMM is a three letter abbreviation of the month as follows: January as 'Jan', February as 'Feb', March as 'Mar', April as 'Apr', May as 'May', June as 'Jun', July as Jul', August as 'Aug', September as 'Sep', October as 'Oct', November as 'Nov' and December as 'Dec'); for example, November 3rd 2010 would be entered as 2010-Nov-3 and June 15th 2010 as 2010-Jun-15.
- Ensure that the time is specified using 24 hour clock notation (hh:mm) using a colon to separate the hh and the mm portions of the time; for example 23:59.

  If left untouched the controls default to 23.59, today's date.

  TIP *Note that the safest way to ensure date and time is entered using the correct format is to use the date and time picker.*

Time Zone. An editable drop-down list enabling you to specify the time zone in which the agents that you want to generate the report for are working from. Specifying a time zone is necessary because the dialler server is based in the UK and, without the time zone control, 9am would be recognised by the server as 9am UK time regardless of the time zone your agents are actually working in, resulting in incorrect statistics being included in the report.

Select an appropriate time zone from the drop-down list.

Optional Filter Criteria. A selection box displaying all Salesforce users who have been specified as Maximise for Salesforce agents enabling you to pick those on whom you want to focus the report on.

To focus the report on a single agent select it from those listed. To focus the report on some but not all agents use the <Shift> or <Ctrl> keys in combination with your mouse to multi-select appropriate agents. To focus the report on all agents do not select any from those listed.

The selection box control defaults to selecting all agents.

Download Report as Excel Files. An editable checkbox enabling you to specify how the report, once generated, should be output. The report can be displayed in a secondary browser window or as a Microsoft® Excel® spreadsheet.

To display the report in a secondary browser window ensure that the checkbox is not ticked. To display the report as a Microsoft® Excel® spreadsheet ensure that the checkbox is ticked.

Generate Report. A button enabling you to generate the report using the filter criteria defined.

To generate the report:

1. Select the **Maximise Administration** tab.

2. Click the **Click here for Reports** link in the Magnetic North Maximise Campaign Management header, a Salesforce Agent Report dialog is displayed.

3. Leave the **Reports** drop-down list as is to confirm that the report you want to generate is named Agent.

4. Use the **Campaign** drop-down list to select a single campaign to focus the report on, or alternatively, leave it as is to focus on all campaigns.

5. Use the **From** and **To** editable date and time selection controls to specify the start date and time and end date and time of the range of time upon which you want to focus the report.

6. Use the **Time Zone** drop-down list to specify the time zone in which the agents were working when calls were made.

7. Use the **Optional Filter Criteria** selection box to select the agents upon whom you want to focus the report, or alternatively, leave it as is to focus on all agents.

8. Tick the **Download Report As Excel File** editable checkbox to generate the report as a Microsoft® Excel® spreadsheet, or alternatively, remove a tick from the checkbox to generate the report and display it in a secondary browser window.

9. Select the **Generate Report** button to generate the report as per the filter criteria you have defined.

3.6.3 Viewing Maximise for Salesforce Dashboards

To view a Maximise for Salesforce dashboard (a graphical representation of your report content):

1. Select the **Dashboards** tab.

2. Select the **Maximise Campaign Dashboards** option from the View Dashboard drop-down list.

3. The following dashboards – Abandon Rate, Connect Rate, List Penetration, Call Outcome, Success Rate and Agent Status – require you to specify a campaign using the Campaigns drop-down list before they will display data.
   Use the **Campaigns** drop-down list below each of the appropriate dashboards to select the appropriate campaign, followed by clicking the **Update** button.

4. ALL remaining dashboards have been configured so that they display data for all campaigns by default (i.e. as a result of using the default report options for the reports on which these dashboard components are based).

   Should you need any of the dashboards to display alternative data, outside of the default report options, you will need to reconfigure the reports:

   a. Click on the appropriate dashboard to view the underlying report content that was used to generate the dashboard content.
   b. Use the **Summarize Information By**, **View** and **Select Campaign** fields to change the default report options.
   c. Select the **Run Report** button to re-generate the report based on the changed report options.
   d. Select the **Save** button to save changes you have made to the report.
   e. Select the **Save & Return to Report** button to confirm that you want to save changes made to the report.
   f. Select the **Dashboards** tab to view the reconfigured dashboard.

4. Maximise for Salesforce Agents Handling Campaign Calls

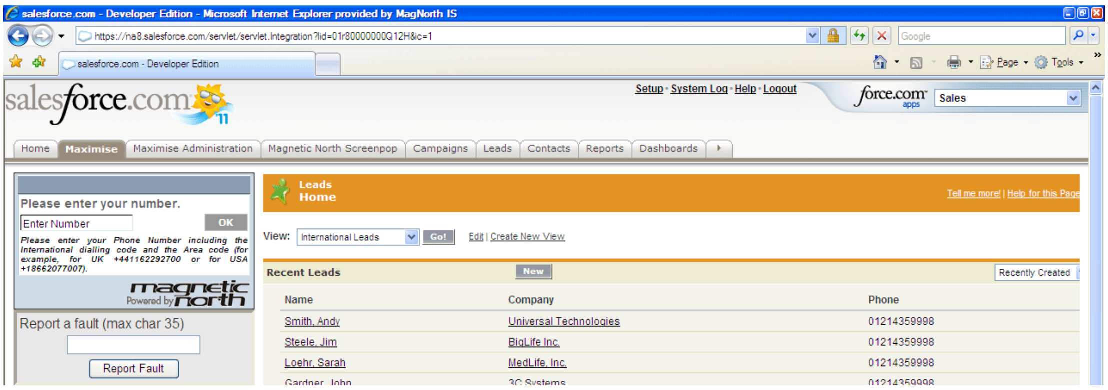
The following section details the process of logging a Salesforce user into a campaign and handling the calls that are generated by Maximise for Salesforce. From here on the Salesforce user is referred to as the Maximise for Salesforce 'agent'.

WARNING *The Maximise for Salesforce sidebar is currently only supported for use with Microsoft® Internet Explorer® versions 6 through 9, Mozilla® Firefox® and Google Chrome™ Web browsers. Future versions will provide support for additional Web browsers.*

WARNING To ensure proper Maximise for Salesforce operation Salesforce users (i.e. Maximise for Salesforce agents) must only be logged into one instance of Salesforce. Logging into more than one instance of Salesforce prevents Maximise for Salesforce from being able to route calls to the correct Salesforce session.

1. Select the **Maximise** tab within Salesforce**.**

In order for Maximise for Salesforce to route calls to the agent the number of the telephone that the agent wishes to receive calls at must be provided.

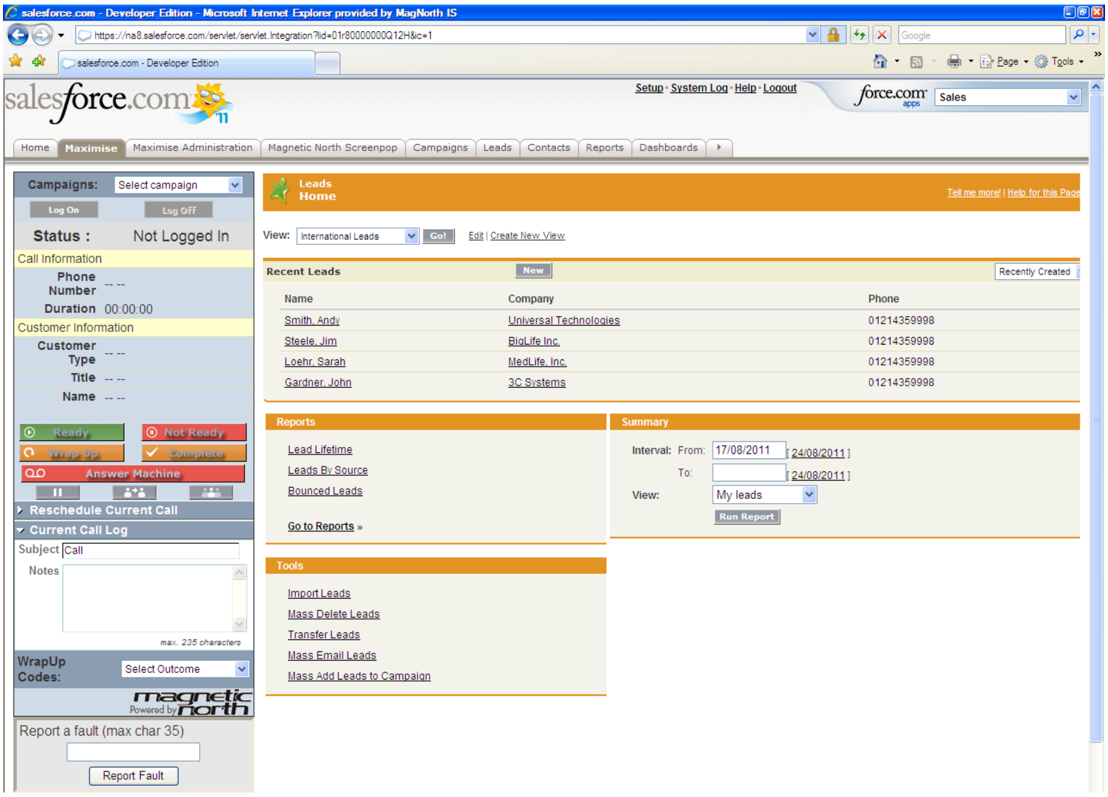


2. Use the **Please enter your number** field to specify an appropriate telephone number <u>including the full international dialling code</u>.

   TIP *The telephone number field will only accept entry of numbers.*

3. Select the **OK** button to continue.

Having specified an appropriate telephone number the Maximise for Salesforce sidebar is displayed (positioned to the left hand side of the Salesforce workspace). Before Maximise for Salesforce is able to dial and route calls to the agent a campaign must be selected for the agent to log into.



4. Use the **Campaigns** drop-down list to select the appropriate campaign.

   TIP Should the appropriate campaign not be listed the agent can refresh the Campaigns drop-down list by clicking on the 'Campaigns' label text positioned to the left of the drop-down list.

5. Select the **Log On** button to log into the selected campaign.

Maximise for Salesforce rings the telephone number specified by the agent. When the agent answers a connection is made to the agent's telephone; this is known as a 'nailed up' connection through which all campaigns calls are routed. Do not hang up the telephone until you have finished handling calls for the day and have logged out of the campaign.

TIP If an agent hangs up the 'nailed up' connection Maximise for Salesforce will attempt to call the agent back.

Maximise for Salesforce remains unable to route campaign calls to the agent until the agent sets their status to ready (to receive calls).

6. Select the **Ready** button to specify that the agent is ready to receive calls.

How the agent progresses next is dependent upon the dialling mode that has been configured for the campaign. The following pages outline how to progress calls in predictive, open preview and progressive dialling mode campaigns.

4.1 For Campaigns Configured to use the Predictive Dialling Mode

As soon as the agent sets their status to ready (to receive calls) Maximise for Salesforce will be dialling the associated campaign members (leads and / or contacts). When a call connects to a campaign member Maximise for Salesforce displays the member's details as a screen pop of information within Salesforce and a single beep is played to the agent to signify a call is connecting. The agent status changes from ready to talking.

The Call Information area of the Maximise for Salesforce sidebar populates with the telephone number being dialled and begins timing how long has passed since the agent last changed state (i.e. from no call to a call). The Customer Information area of the Maximise for Salesforce sidebar populates with details relating to the campaign member (type, title and name).

How the agent progresses the call depends entirely upon the success, or otherwise, of the communication that occurs between agent and campaign member.

7. If the agent...

   a. ...has been routed a call that reaches an answer machine:

      i. Use the **Subject** and **Notes** fields in the **Current Call Log** area of the Maximise for Salesforce sidebar to record any call related notes that should be stored.
         TIP *Notes are stored within the Activity History area of Salesforce for the appropriate campaign or campaign member. The status of the member is updated to 'Responded'.*

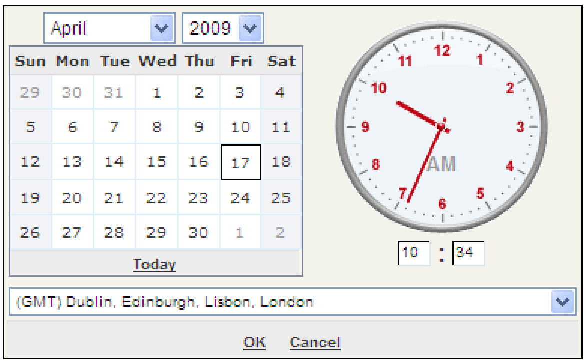
      ii. Select the **Answer Machine** button to automatically assign an answer machine outcome to the call. By assigning an answer machine outcome the number is returned to the pool of numbers so it can be dialled again at a later time.
         The agent then re-enters the ready state until Maximise for Salesforce routes another call to them.

   b. ...has been routed a call that reaches a campaign member BUT the campaign member would like to reschedule the call to an alternative date and / or time:

      i. Expand the **Reschedule Current Call** panel by clicking on the collapse/expand triangle icon to the left of the label.

      ii. If the rescheduled call should be presented to the agent who handled the original call ensure that the **Personal** radio button is selected. However, if the reschedule call can be presented to any agent who is logged into the campaign ensure that the **Team** radio button is selected.

      iii. Select the **Browse** button (...) to display a date, time and time zone picker for the rescheduled call.



– Use the **month** and **year** drop-down controls and the **calendar** control to define the day on which the rescheduled call should occur.

– Use the **clock** control to define the time when the rescheduled call should occur. You can either use your mouse to rotate the clock arms (12hr format), or type directly into the hour and minute fields (24hr format). For 12hr format times click on the AM / PM indicator to alternate between AM and PM.

– Use the **time zone** drop-down controls to specify the time zone in which the rescheduled call should occur on the date and time selected. For instance, if the member you are calling is in Hawaii select the (GMT -10:00) Hawaii time zone to ensure the rescheduled call occurs at the correct Hawaiian time.
TIP *It is your responsibility to ensure that agents are logged into the Maximise for Salesforce campaign at the corresponding time within your own time zone to ensure an agent is available to handle the rescheduled call.*

– Select the **OK** button to submit the details of the rescheduled call.

iv. The campaign member may want the rescheduled call to be made to an alternative phone number. Optionally use the **Number** field to define the alternative number, including the international dialling and area codes; for example 441161234567 for a UK number, 1123456789 for a US number.

v. Select the **Reschedule** button to submit the full details of the reschedule and signify the agent is ready to receive another call.

The agent then re-enters the ready state until Maximise for Salesforce routes another call to them.

c. ...has been routed a call that reaches a campaign member AND any additional call related administrative tasks can be completed whilst the call is connected:

i. Use the **Subject** and **Notes** fields in the **Current Call Log** area of the Maximise for Salesforce sidebar to record any call related notes that should be stored.
TIP Notes are stored within the Activity History area of Salesforce for the appropriate campaign or campaign member. The status of the member is updated to 'Responded'.

ii. Use the **Wrap Up Codes** drop-down list to specify an appropriate call outcome to be assigned to the call.

iii. Select the **Complete** button to complete the call and signify that the agent is ready to receive another call.

The agent then re-enters the ready state until Maximise for Salesforce routes another call to them.

d. ...has been routed a call that reaches a campaign member BUT any call related administrative tasks cannot be completed whilst the call is connected:

i. Use the **Subject** and **Notes** fields in the **Current Call Log** area of the Maximise for Salesforce sidebar to record any call related notes that should be stored.

TIP Notes are stored within the Activity History area of Salesforce for the appropriate campaign or campaign member. The status of the member is updated to 'Responded'.

ii. Use the **Wrap Up Codes** drop-down list to specify an appropriate call outcome to be assigned to the call.

iii. Select the **Wrap Up** button to enter a period of 'wrap up' time within which the agent can complete any call related administrative tasks. The campaign member is disconnected from the agent but the agent is not routed another call until the **Complete** button is selected to signify that the agent is ready for another call.

iv. Select the **Complete** button to complete the call and signify that the agent is ready to receive another call.

The agent then re-enters the ready state until Maximise for Salesforce routes another call to them.

8. When the agent has completed a full day of work, or when a break is required, and is ready to stop receiving calls select the **Not Ready** button to signify that Maximise should not attempt to route any further calls to the agent. If you are going on a short break you can leave the agent in the Not Ready status until you are ready to resume at which point you should select the **Ready** (to receive calls) button to re-enter the ready state.

TIP *If the agent has just completed a call when they select the Not Ready button Maximise for Salesforce may have already reserved the agent for the next call; if this is the case the agent will have to take and complete the following call before their status is changed to Not Ready and no further calls are routed to them.*

9. If you have finished handling calls for the day select the **Log Off** button to log out of Maximise for Salesforce.

10. Hang up the telephone to which Maximise for Salesforce has been routing calls.

TIP *The Hold, Call Transfer and Call Conference buttons within the Maximise for Salesforce sidebar are disabled in this version.*

TIP *If, at any time during the course of being logged into a Maximise for Salesforce campaign, the agent selects an alternative Salesforce tab the agent is effectively removed from the pool of agents to whom Maximise for Salesforce can route calls. When the agent reselects the Maximise tab they are added back into the pool of agents and Maximise for Salesforce is able to immediately start routing calls to them again.*

4.2 For Campaigns Configured to use the Open Preview Dialling Mode

As soon as the agent sets their status to ready (to receive calls) Maximise for Salesforce will display the campaign member record for the next call that has been assigned to that agent. This is a preview period allowing the agent to familiarise themselves with the details of the upcoming call with the campaign member.

7. If the agent...

    a. ...wants to reject the call based on previewing the campaign member details, AND the campaign has been configured to allow agents to reject calls based on the preview period alone, select the **Cancel Preview** button. The call is returned to the dialler and will be presented to another agent.

       The agent then re-enters the ready state until Maximise for Salesforce presents preview details of another call to them.

    b. ...is ready to accept the call based on previewing the campaign member details select the **Dial Now** button.

Having accepted a call based on previewing the campaign member details, when the call connects to the campaign member a single beep is played to the agent to signify the call is connecting.

The Call Information area of the Maximise for Salesforce sidebar populates with the telephone number being dialled and begins timing how long has passed since the agent last changed state (i.e. from no call to a call). The Customer Information area of the Maximise for Salesforce sidebar populates with details relating to the campaign member (type, title and name).

How the agent progresses the call depends entirely upon the success, or otherwise, of the communication that occurs between agent and campaign member.

8. If the agent...

    a. ...has been routed a call that reaches an answer machine:

        i. Use the **Subject** and **Notes** fields in the **Current Call Log** area of the Maximise for Salesforce sidebar to record any call related notes that should be stored.

           TIP *Notes are stored within the Activity History area of Salesforce for the appropriate campaign or campaign member. The status of the member is updated to 'Responded'.*

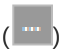
        ii. Select the **Answer Machine** button to automatically assign an answer machine outcome to the call. By assigning an answer machine outcome the number is returned to the pool of numbers so it can be dialled again at a later time.

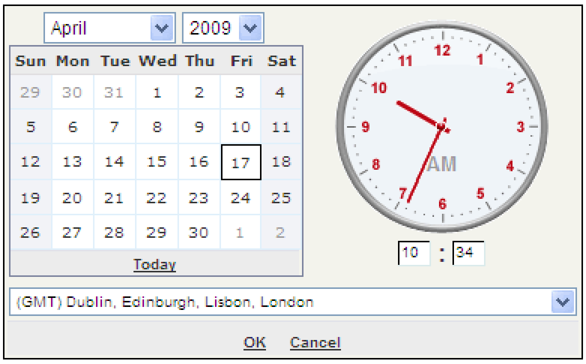
The agent then re-enters the ready state until Maximise for Salesforce routes another call to them.

b. ...has been routed a call that reaches a campaign member BUT the campaign member would like to reschedule the call to an alternative date and / or time:

i. Expand the **Reschedule Current Call** panel by clicking on the collapse/expand triangle icon to the left of the label.

ii. If the rescheduled call should be presented to the agent who handled the original call ensure that the **Personal** radio button is selected. However, if the reschedule call can be presented to any agent who is logged into the campaign ensure that the **Team** radio button is selected.

iii. Select the **Browse** button () to display a date, time and time zone picker for the rescheduled call.



- Use the **month** and **year** drop-down controls and the **calendar** control to define the day on which the rescheduled call should occur.

- Use the **clock** control to define the time when the rescheduled call should occur. You can either use your mouse to rotate the clock arms (12hr format), or type directly into the hour and minute fields (24hr format). For 12hr format times click on the AM / PM indicator to alternate between AM and PM.

- Use the **time zone** drop-down controls to specify the time zone in which the rescheduled call should occur on the date and time selected. For instance, if the member you are calling is in Hawaii select the (GMT -10:00) Hawaii time zone to ensure the rescheduled call occurs at the correct time within the Hawaii time zone.

TIP *It is your responsibility to ensure that agents are logged into the Maximise for Salesforce campaign at the corresponding time within your own time zone to ensure* *an agent is available to handle the rescheduled call.*

- Select the **OK** button to submit the details of the rescheduled call.

iv. The campaign member may want the rescheduled call to be made to an alternative phone number. Optionally use the **Number** field to define the alternative number, including the international dialling and area codes; for example 441161234567 for a UK number, 1123456789 for a US number.

v. Select the **Reschedule** button to submit the full details of the reschedule and signify the agent is ready to receive another call.

The agent then re-enters the ready state until Maximise for Salesforce routes another call to them.

c. ...has been routed a call that reaches a campaign member AND any additional call related administrative tasks can be completed whilst the call is connected:

i. Use the **Subject** and **Notes** fields in the **Current Call Log** area of the Maximise for Salesforce sidebar to record any call related notes that should be stored.

TIP *Notes are stored within the Activity History area of Salesforce for the appropriate campaign or campaign member. The status of the member is updated to 'Responded'.*

ii. Use the **Wrap Up Codes** drop-down list to specify an appropriate call outcome to be assigned to the call.

iii. Select the **Complete** button to complete the call and signify that the agent is ready to receive another call.

The agent then re-enters the ready state until Maximise for Salesforce routes another call to them.

d. ...has been routed a call that reaches a campaign member BUT any call related administrative tasks cannot be completed whilst the call is connected:

i. Use the **Subject** and **Notes** fields in the **Current Call Log** area of the Maximise for Salesforce sidebar to record any call related notes that should be stored.

TIP *Notes are stored within the Activity History area of Salesforce for the appropriate campaign or campaign member. The status of the member is updated to 'Responded'.*

ii. Use the **Wrap Up Codes** drop-down list to specify an appropriate call outcome to be assigned to the call.

iii. Select the **Wrap Up** button to enter a period of 'wrap up' time within which the agent can complete any call related administrative tasks. The campaign member is disconnected from the agent but the agent is not routed another call until the **Complete** button is selected to signify that the agent is ready for another call.

iv. Select the **Complete** button to complete the call and signify that the agent is ready to receive another call.

The agent then re-enters the ready state until Maximise for Salesforce routes another call to them.

9. When the agent has completed a full day of work, or when a break is required, and is ready to stop receiving calls select the **Not Ready** button to signify that Maximise should not attempt to route any further calls to the agent. If you are going on a short break you can leave the agent in the Not Ready status until you are ready to resume at which point you should select the **Ready** (to receive calls) button

   TIP *If the agent has just completed a call when they select the Not Ready button Maximise for Salesforce may have already reserved the agent for the next call; if this is the case the agent will have to take and complete the following call before their status is changed to Not Ready and no further calls are routed to them.*

10. If you have finished handling calls for the day select the **Log Off** button to log out of Maximise for Salesforce.

11. Hang up the telephone to which Maximise for Salesforce has been routing calls.

TIP *The Hold, Call Transfer and Call Conference buttons within the Maximise for Salesforce sidebar are disabled in this version.*

TIP *If, at any time during the course of being logged into a Maximise for Salesforce campaign, the agent selects an alternative Salesforce tab the agent is effectively removed from the pool of agents to whom Maximise for Salesforce can route calls. When the agent reselects the Maximise tab they are added back into the pool of agents and Maximise for Salesforce is able to immediately start routing calls to them again.*

4.3 For Campaigns Configured to use the Progressive Dialling Mode

As soon as the agent sets their status to ready (to receive calls) Maximise for Salesforce will display the campaign member record for the next call that has been assigned to that agent. This is a preview period allowing the agent to familiarise themselves with the details of the upcoming call to the campaign member. However, as the campaign is running in progressive mode the preview period lasts only as long as it takes Maximise for Salesforce to dial the campaign member.

When the call connects to the campaign member a single beep is played to the agent to signify the call is connecting. The preview period is now over.

The Call Information area of the Maximise for Salesforce sidebar populates with the telephone number being dialled and begins timing how long has passed since the agent last changed state (i.e. from no call to a call). The Customer Information area of the Maximise for Salesforce sidebar populates with details relating to the campaign member (type, title and name).

How the agent progresses the call depends entirely upon the success, or otherwise, of the communication that occurs between agent and campaign member.

7. If the agent...

    a. ...has been routed a call that reaches an answer machine:

        i. Use the **Subject** and **Notes** fields in the **Current Call Log** area of the Maximise for Salesforce sidebar to record any call related notes that should be stored.

            TIP *Notes are stored within the Activity History area of Salesforce for the appropriate campaign or campaign member. The status of the member is updated to 'Responded'.*

        ii. Select the **Answer Machine** button to automatically assign an answer machine outcome to the call. By assigning an answer machine outcome the number is returned to the pool of numbers so it can be dialled again at a later time.

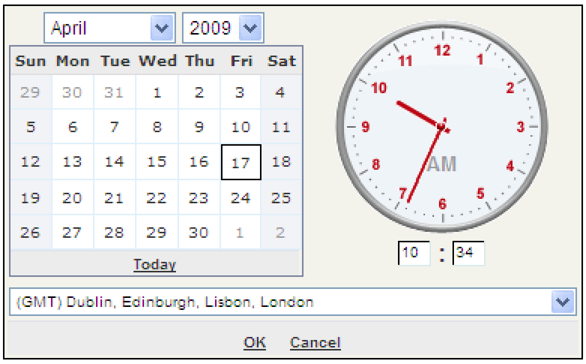
            The agent then re-enters the ready state until Maximise for Salesforce routes another call to them.

    b. ...has been routed a call that reaches a campaign member BUT the campaign member would like to reschedule the call to an alternative date and / or time:

        i. Expand the **Reschedule Current Call** panel by clicking on the collapse/expand triangle icon to the left of the label.

        ii. If the rescheduled call should be presented to the agent who handled the original call ensure that the **Personal** radio button is selected. However, if the reschedule call can be presented to any agent who is logged into the campaign ensure that the **Team** radio button is selected.

        iii. Select the **Browse** button (...) to display a date, time and time zone picker for the rescheduled call.



– Use the **month** and **year** drop-down controls and the **calendar** control to define the day on which the rescheduled call should occur.

– Use the **clock** control to define the time when the rescheduled call should occur. You can either use your mouse to rotate the clock arms (12hr format), or type directly into the hour and minute fields (24hr format). For 12hr format times click on the AM / PM indicator to alternate between AM and PM.

– Use the **time zone** drop-down controls to specify the time zone in which the rescheduled call should occur on the date and time selected. For instance, if the member you are calling is in Hawaii select the (GMT -10:00) Hawaii time zone to ensure the rescheduled call occurs at the correct time within the Hawaii time zone.

TIP *It is your responsibility to ensure that agents are logged into the Maximise for Salesforce campaign at the corresponding time within your own time zone to ensure an agent is available to handle the rescheduled call.*

– Select the **OK** button to submit the details of the rescheduled call.

iv. The campaign member may want the rescheduled call to be made to an alternative phone number. Optionally use the **Number** field to define the alternative number, including the international dialling and area codes; for example 441161234567 for a UK number, 1123456789 for a US number.

v. Select the **Reschedule** button to submit the full details of the reschedule and signify the agent is ready to receive another call.

The agent then re-enters the ready state until Maximise for Salesforce routes another call to them.

c. ...has been routed a call that reaches a campaign member AND any additional call related administrative tasks can be completed whilst the call is connected:

i. Use the **Subject** and **Notes** fields in the **Current Call Log** area of the Maximise for Salesforce sidebar to record any call related notes that should be stored.

TIP *Notes are stored within the Activity History area of Salesforce for the appropriate campaign or campaign member. The status of the member is updated to 'Responded'.*

ii. Use the **Wrap Up Codes** drop-down list to specify an appropriate call outcome to be assigned to the call.

iii. Select the **Complete** button to complete the call and signify that the agent is ready to receive another call.

The agent then re-enters the ready state until Maximise for Salesforce routes another call to them.

d. ...has been routed a call that reaches a campaign member BUT any call related administrative tasks cannot be completed whilst the call is connected:

   i. Use the **Subject** and **Notes** fields in the **Current Call Log** area of the Maximise for Salesforce sidebar to record any call related notes that should be stored.

      TIP *Notes are stored within the Activity History area of Salesforce for the appropriate campaign or campaign member. The status of the member is updated to 'Responded'.*

   ii. Use the **Wrap Up Codes** drop-down list to specify an appropriate call outcome to be assigned to the call.

   iii. Select the **Wrap Up** button to enter a period of 'wrap up' time within which the agent can complete any call related administrative tasks. The campaign member is disconnected from the agent but the agent is not routed another call until the **Complete** button is selected to signify that the agent is ready for another call.

   iv. Select the **Complete** button to complete the call and signify that the agent is ready to receive another call.

      The agent then re-enters the ready state until Maximise for Salesforce routes another call to them.

8. When the agent has completed a full day of work, or when a break is required, and is ready to stop receiving calls select the **Not Ready** button to signify that Maximise should not attempt to route any further calls to the agent. If you are going on a short break you can leave the agent in the Not Ready status until you are ready to resume at which point you should select the **Ready** (to receive calls) button

   TIP *If the agent has just completed a call when they select the Not Ready button Maximise for Salesforce may have already reserved the agent for the next call; if this is the case the agent will have to take and complete the following call before their status is changed to Not Ready and no further calls are routed to them.*

9. If you have finished handling calls for the day select the Log Off button to log out of Maximise for Salesforce.

10. Hang up the telephone to which Maximise for Salesforce has been routing calls.

TIP *The Hold, Call Transfer and Call Conference buttons within the Maximise for Salesforce sidebar are disabled in this version.*

TIP *If, at any time during the course of being logged into a Maximise for Salesforce campaign, the agent selects an alternative Salesforce tab the agent is effectively removed from the pool of agents to whom Maximise for Salesforce can route calls. When the agent reselects the Maximise tab they are added back into the pool of agents and Maximise for Salesforce is able to immediately start routing calls to them again.*

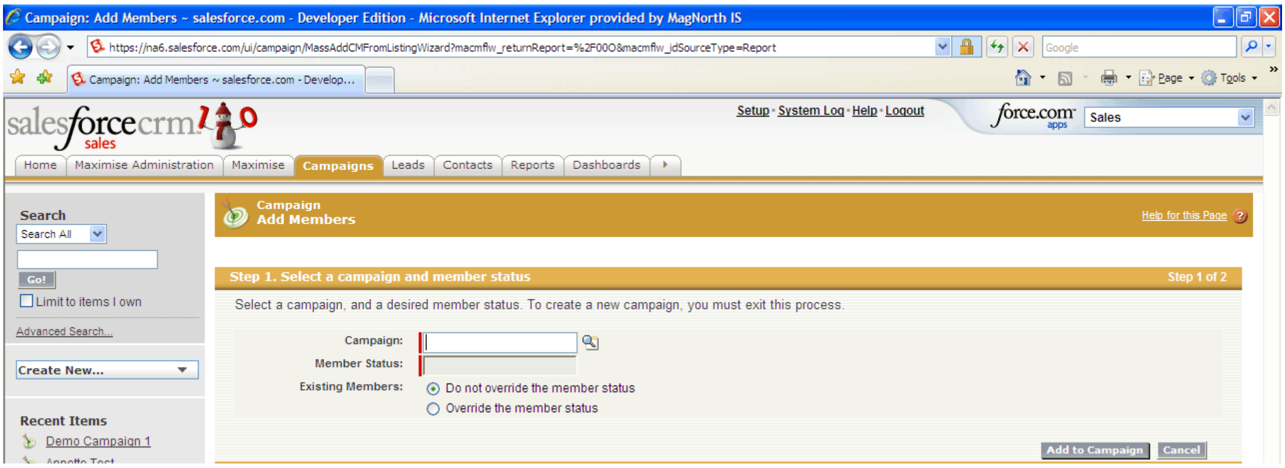
5. Frequently Asked Questions

5.1 How can I add unlimited leads to a campaign using a custom report?

The Reports tab within Salesforce enables you to create your own custom reports in addition to providing you with a number of ‘out of the box’ reports. By creating a report (custom or out of the box) that returns all of the leads you are interested in assigning to a Maximise for Salesforce campaign you can then assign them ALL in one action, regardless of the number of leads listed within the report. Clearly this is a more efficient method to assign leads to a campaign than the Manage Members method as that restricts you to 200 leads at a time, and consequently, where you have more than 200 leads forces you to repeat the method until you have assigned all of them to the campaign.

TIP *Before you follow the steps outlined below please make sure that you have synchronised the Salesforce users that you want to act as Maximise for Salesforce agents for the appropriate campaign via the Maximise Administration tab (tick the checkbox of the appropriate users and click the (1) Update Campaign Agents button). This ensures that you can select the ‘Not Dialled’ member status value when assigning the leads to the campaign.*

1. Select the **Reports** tab.
2. Generate an appropriate out of the box report, or create a custom report, to return all leads that you want to assign to the campaign. The report must allow you to select leads that are returned by the report (i.e. a checkbox must be displayed next to each lead).
3. Select the checkbox for every reported lead that you want to assign to the campaign.
4. Click the **Add to Campaign** button.



5. Use the **Campaign** field to select the campaign to which you want to assign the leads.
6. Use the **Member Status** field to select the ‘Not Dialled’ status required by Maximise for Salesforce.
7. Select the rule to be used for existing members, either **Do Not Override The Member Status**, or **Override The Member Status**.
8. Click the **Add to Campaign** button.

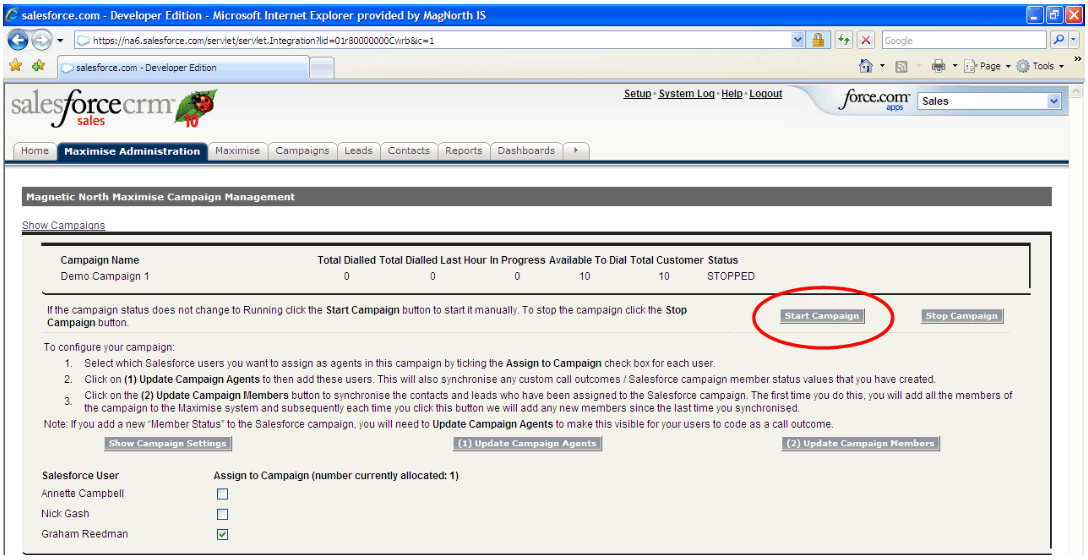
5.2 How do I start a campaign should it not start automatically?

These notes have been provided to help you start a Maximise for Salesforce campaign IF it does not start automatically. Starting a campaign is a simple matter of clicking the *Start Campaign* button. Follow the steps outlined below:

1. Select the **Maximise Administration** tab.
2. Select the appropriate campaign by clicking on the **campaign name**.

> ***TIP*** *Should too many campaigns be listed use the filter bar embedded within the Maximise Administration tab to filter out those you are not interested in. By ensuring a tick is placed in the appropriate checkbox followed by selecting the Filter Campaigns button you can filter out all campaigns that are not 'active' (Show Active) all campaigns that are not of type 'telemarketing' (Show Telemarketing) and all campaigns that are not already loaded into Maximise for Salesforce (Loaded in Maximise). The filter bar also enables you to filter by campaign name; enter an appropriate textual string to search for followed by the Filter Campaigns button.*

3. Select the **Start Campaign** button. After a few moments the campaign will start.



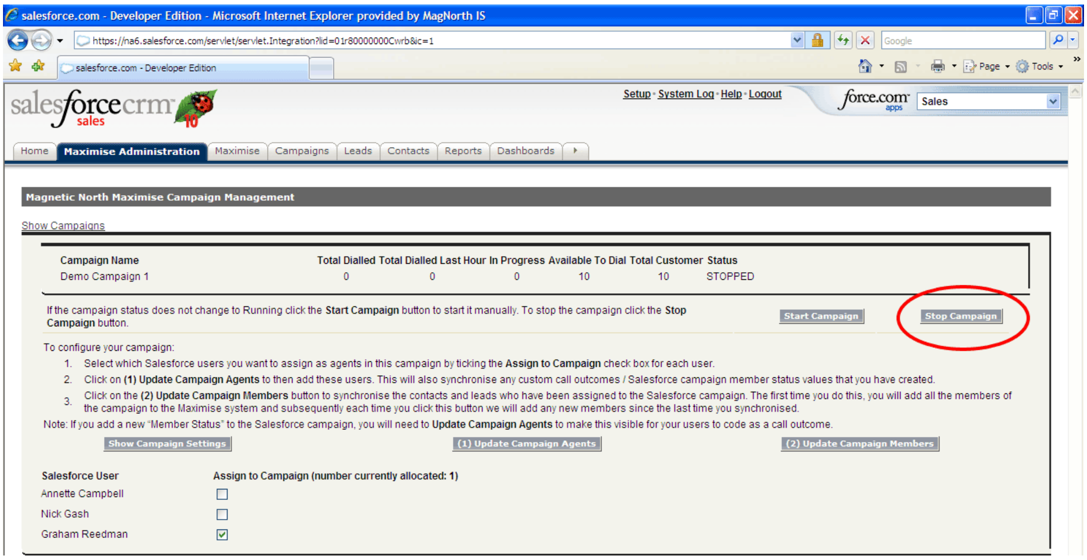
5.3 How do I stop a campaign?

These notes have been provided to help you stop a Maximise for Salesforce campaign IF you have a need to stop it before all campaign members have been contacted. Stopping a campaign is a simple matter of clicking the *Stop Campaign* button. Follow the steps outlined below:

1. Select the **Maximise Administration** tab.
2. Select the appropriate campaign by clicking on the **campaign name**.

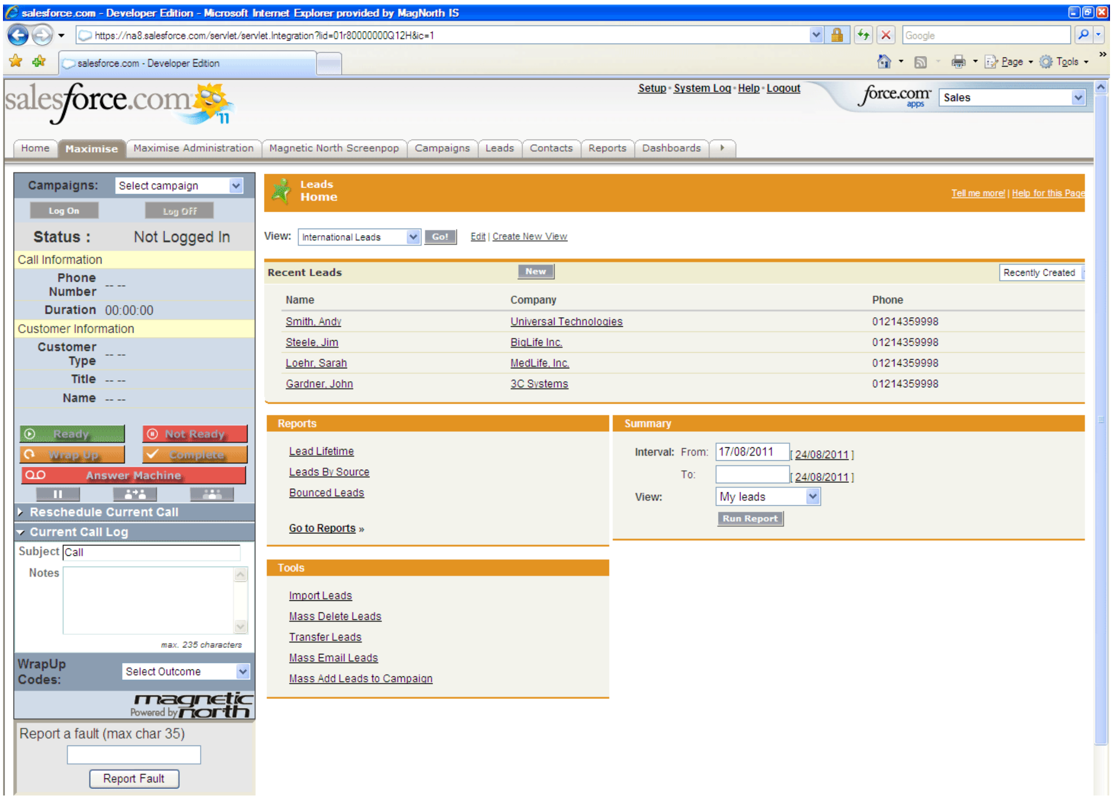
> ***TIP*** *Should too many campaigns be listed use the filter bar embedded within the Maximise Administration tab to filter out those you are not interested in. By ensuring a tick is placed in the appropriate checkbox followed by selecting the Filter Campaigns button you can filter out all campaigns that are not 'active' (Show Active) all campaigns that are not of type 'telemarketing' (Show Telemarketing) and all campaigns that are not already loaded into Maximise for Salesforce (Loaded in Maximise). The filter bar also enables you to filter by campaign name; enter an appropriate textual string to search for followed by the Filter Campaigns button.*

3. Select the **Stop Campaign** button. After a few moments the campaign will stop.



5.4 How can I report a fault in the Maximise for Salesforce sidebar?

A fault submission field has been added beneath the Maximise for Salesforce sidebar to make it easier for you to report a fault.



To report a fault:

1. Use the **Report a fault** field to specify a brief description of the issue (up to a maximum length of 35 characters).
2. Click the **Report Fault** button.

Upon clicking the button appropriate log files will be retrieved from your system and sent to Magnetic North support to help us to resolve your issue.