Call Logic with Allstate Lead Manager

Contents

*Note: To navigate directly to any section, hold down CTRL and click on any heading within the Table of Contents.

Call Logic Dial Settings

Before you get started with Call Logic, there are a few settings you'll want to adjust within your Call Logic account. This is the only time you'll need to log directly into Call Logic - if you're using Lead Manager, the rest can be done within your Lead Manager account.

1. [Log in](#) to Call Logic
2. Navigate to Campaign > General Settings
3. For **"Caller ID Display"** enter your callback number. This the number that will show up on the call recipient's caller ID.
4. For **"Click to Call Phone Number"** enter the phone number you'll be using to dial with the Click to Call feature. This will often be the name phone number as your Caller ID Display.
5. For **"Wrap Time"** select 1 minute. This is the amount of time you'll have between phone calls to add notes into Lead Manager. We suggest starting with 1 minute, then adjusting to a lower amount of time as you're more comfortable with the system.
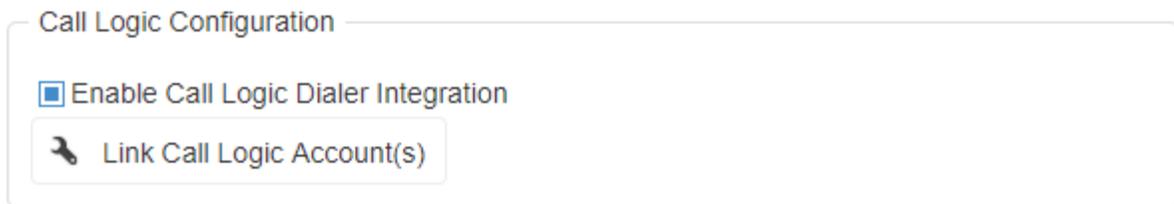
Linking your Call Logic account to Lead Manager

1. Log in to Lead Manager
2. Navigate to Administration > My Company, and click the checkbox next to "Enable Call Logic Dialer Integration." Click Update on the bottom of the page. A button will appear that says "Link Call Logic Account(s)." Click that button.
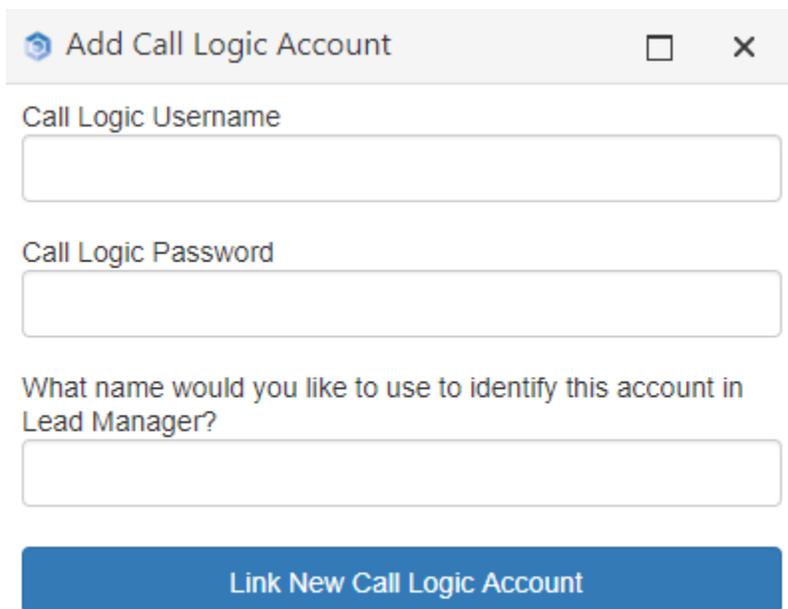

3. In the "Linked Call Logic Accounts" screen, click "+ Link New Call Logic Account." Enter the Username and Password for your Call Logic account, and choose a name to identify this account in Lead Manager (commonly the name of the person using this Call Logic account). Click "Link New Call Logic Account".

4. Repeat steps 1 and 2 for each Call Logic account you have in your office. Note that only one user can use a Call Logic account at a time.

Enabling Click to Call

1. Navigate to Administration > My Company. In the "Click to Call" section, select Call Logic as the provider and click "Enable Click to Call Plugin."
    If you are using Call Logic for Hot Lead Calls, this can be enabled here as well (this feature rings your phone automatically to connect you to new web leads). Click Update on the bottom of the page.

2. Back in Administration > My Company, in the "Call Logic Dialer Integration" section, click "Link Call Logic Accounts."

3. For each Call Logic account, designate the user who will be using that account for Click to Call and/or Hot Lead Dial. To do this, click the "Update User Setting" link, and choose the user. If you have multiple Call Logic accounts, repeat this step for each account.

Call Logic Account User ✕

Select the user who should use this account for Click to Call and Hot Lead Calls.
Only users not linked to other accounts will display here.

No User Assigned
Alex Pope
Archie Heinl
Brent Brehm
Brit Gal
John Smith
Jay Burkett
Kris Charatonik
Mobi Mobi
Taylor Williams
Tina Ca

Update

Note: If you are using Click to Call thru a VoIP service, enabling Call Logic will force the system to use your Call Logic account and not the VoIP service for you Click to Call dialing, thus using your Call Logic calling time

4. Each user who will be using an account for Click to Call needs to add their phone number they will be calling from. Navigate to "My Account" in the main menu bar, and in the "Profile Settings" add the call out number in the "Phone Number" Field.

Profile Settings

| Field	Value
User Name:	testuser
Password:	
Confirm Password:	
First Name:	Test
Last Name:	User
Email Address:	test@test.com
Phone Number:	5672020244 Ext:
Time Zone:	Eastern ▼
Session Timeout:	4 hours ▼
On Login Go To:	Home ▼

5. To use Click to Call, click on the phone number either from the lead list or from within the lead log. The phone number entered in "My Account" in the previous step will ring. Answer the call to dial out.
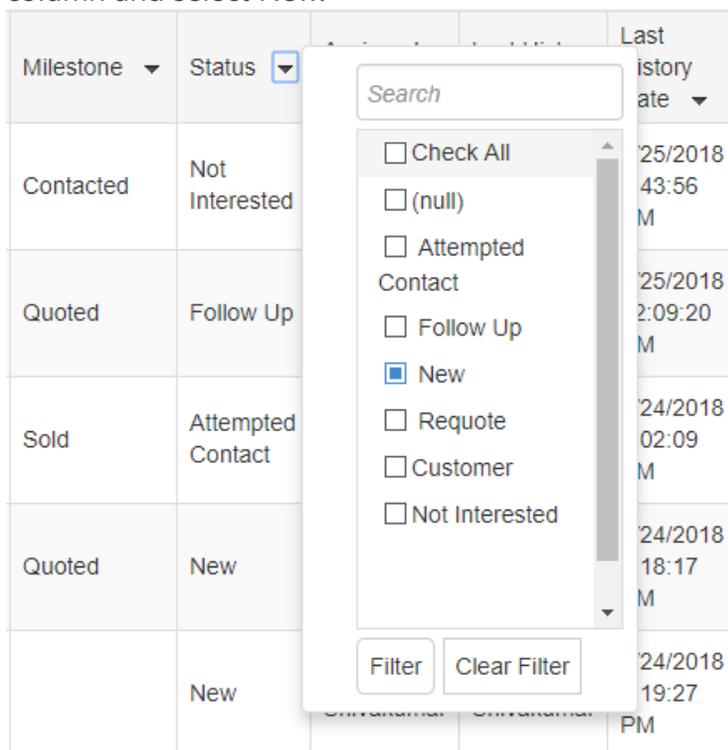
(555) 890-2780 OK

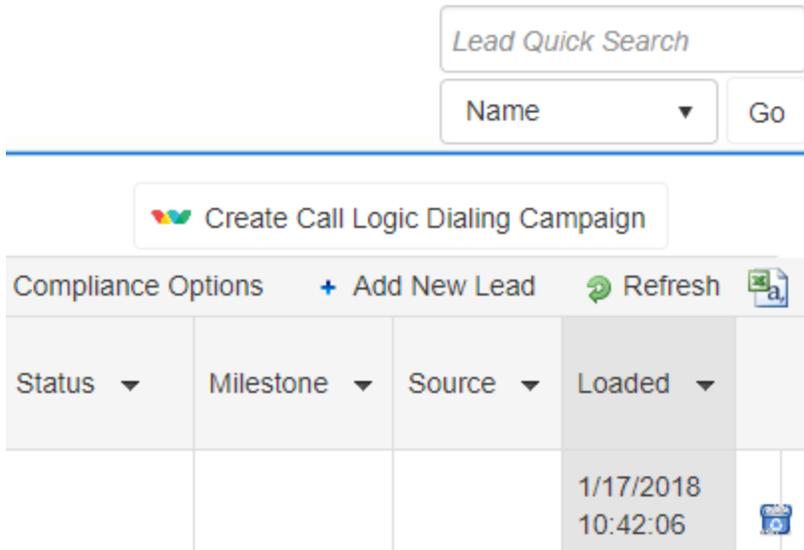# Creating a Call Logic Dialing Campaign

1. Go to the Leads tab and pick a list to dial from (i.e. Shark Tank, My Assigned Leads, Leads - All)
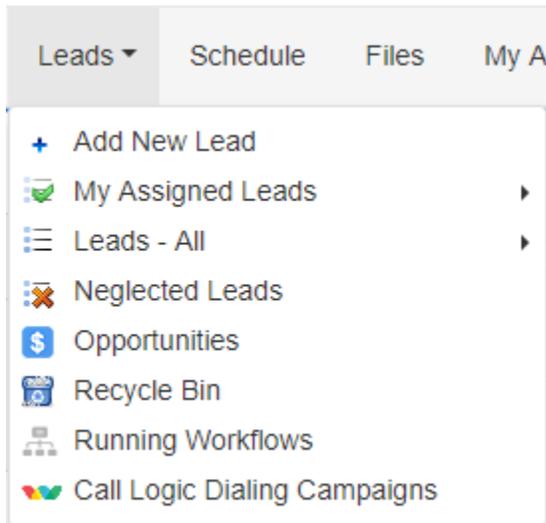
2. Apply any necessary filters if you would like to narrow down the list by clicking the filter icon. For example, if you only want to call leads with a "New" Status, filter the Status column and select New.

3. Click the "Create Call Logic Dialing Campaign" button, located on the top right of the lead list.

4. Create a name for the dialing campaign, and choose the Call Logic account you are dialing from (this option will appear if you have multiple accounts). Click "Add Call Logic Campaign."

5. A red notification will appear above the lead list:

Successfully created the Call Logic Campaign with 361 Leads. Details Start Calling Now!

- Clicking **Details** will tell you how many had duplicate phone numbers, unsupported phone numbers, do not call numbers, etc.
- **Start Calling Now** will prompt you to begin the dialing session. You can also begin the dialing session by navigating to Leads > Call Logic Dialing Campaigns, and clicking "Start Calling" next to the dialing session.

Starting a Dialing Campaign

1. After clicking "Start Calling Now," you'll be prompted to select a platform. We recommend starting with the **Calling Assistant**, which will dial all landlines. After you run through the entire campaign, you can restart the campaign and use **Click to Call**. This will dial all cell phones, and requires an extra click to make the phone call.
2. Next, a screen will pop up with campaign settings. For ring time, 30 seconds is recommended (about 6.5 rings). Fill out the settings for your dialing campaign, and click "Call-In".
3. You will then be prompted to dial in to Call Logic and enter a PIN (the pin will be different each session). The number you are using to dial in will appear on the recipient's caller Id. *You can also set a default caller ID within your Call Logic account in Campaign > General Settings.*

4. Once you're connected to the line, the dialing options will appear on your screen. Click "Start" to begin dialing.
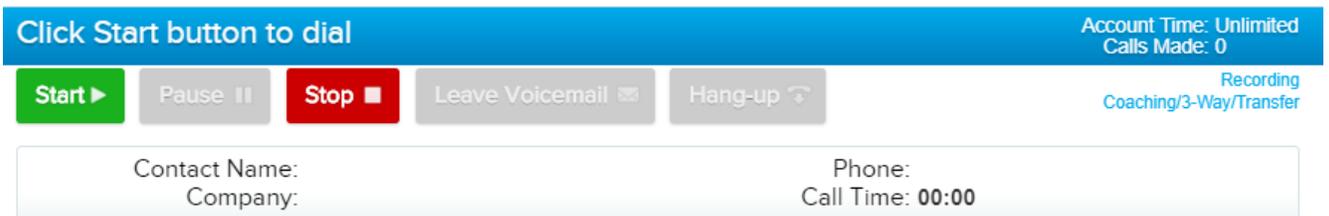
5. When the campaign is in session, you will see a split screen:

   The top section displays your calling options – you are able to start a call, pause a call, stop the campaign, and hang up. After each call, Call Logic will quickly move to the next call unless you click "Pause".
   The amount of time between each call can be customized within your Call Logic account in Campaign > General Settings, under the "Wrap Time" option.

   The bottom section on this screen displays the Lead Manager lead log for the prospect you currently are on the line with. You are able to update their history, appointments, details, etc. from this screen during the call, and the information will automatically be saved to your Lead Manager account.

To make this process simple, we suggest using Quick Actions for one-click updates!

6. In addition to any updates you make, Call Logic will add a history note to the lead with the calling disposition (Connected, Busy, No Answer, etc.) This note will not change the Status or Milestone of the lead.

7. All dialing campaigns are also available in Leads > Call Logic Dialing Campaigns. Click "Start Calling" from this page to resume the campaign where you left off (or to start at the beginning if you haven't began dialing yet). This page also contains statistics and reporting for each campaign.

Reporting

Dialing statistics can be found in Leads > Call Logic Dialing Campaigns. From here, click the chart icon next to a campaign to view:

- Total call time broken down by talk time, paused time, and other
- Total talk time, calls connected, and average talk time
- Number of calls made broken down by connected calls, scrubbed out numbers, and other
- Statistics for each dialing session. A new session begins each time you dial into the campaign to make calls.