

Call Logic with Allstate Lead Manager

Contents

Call Logic Dial Settings	2
Linking your Call Logic account to Lead Manager.....	3
Enabling Click to Call.....	4
Creating a Call Logic Dialing Campaign	7
Starting a Dialing Campaign	9
Reporting	11

***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.



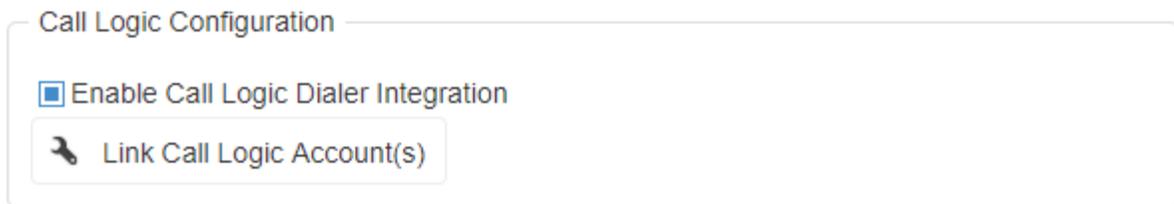
Caller ID Display (Optional): [?](#)

Click to Call Phone Number: [?](#)

Wrap Time:

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.

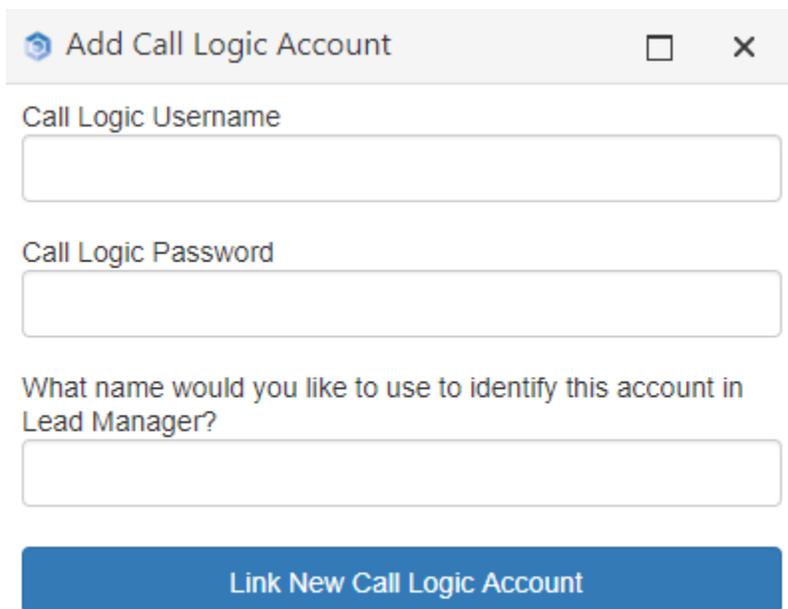


Call Logic Configuration

Enable Call Logic Dialer Integration

 Link Call Logic Account(s)

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".



Add Call Logic Account □ ×

Call Logic Username

Call Logic Password

What name would you like to use to identify this account in Lead Manager?

[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.

Click To Call

Provider:

Enable Click To Call Plugin

Enable Hot Lead Calls

A Hot Lead call is made when a new web lead is added to your Lead Manager account. The assigned to user will receive an instant call to their extension.

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

Call Logic Configuration

Enable Call Logic Dialer Integration



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.

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 Heint

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

- 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

User Name:

Password:

Confirm Password:

First Name:

Last Name:

Email Address:

Phone Number: Ext:

Time Zone: ▼

Session Timeout: ▼

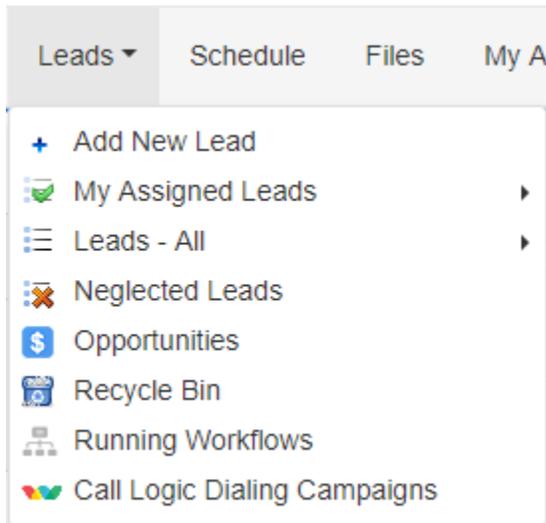
On Login Go To: ▼

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.

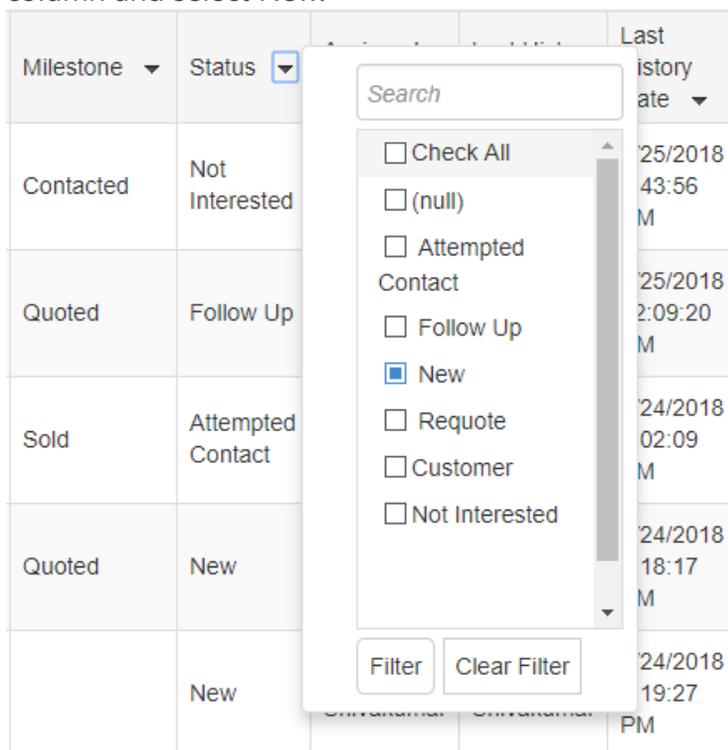


Creating a Call Logic Dialing Campaign

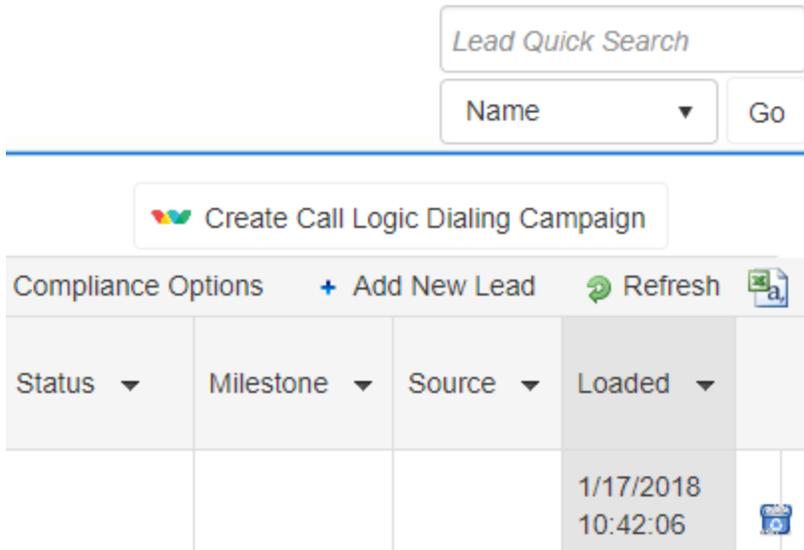
1. Go to the Leads tab and pick a list to dial from (i.e. Shark Tank, My Assigned Leads, Leads - All)



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."

The screenshot shows a modal window titled "Create a Call Logic Dialing Campai...". It contains a text input field with the placeholder text "What name would you like for this dialing campaign?". Below the input field is a button labeled "Add Call Logic Campaign".

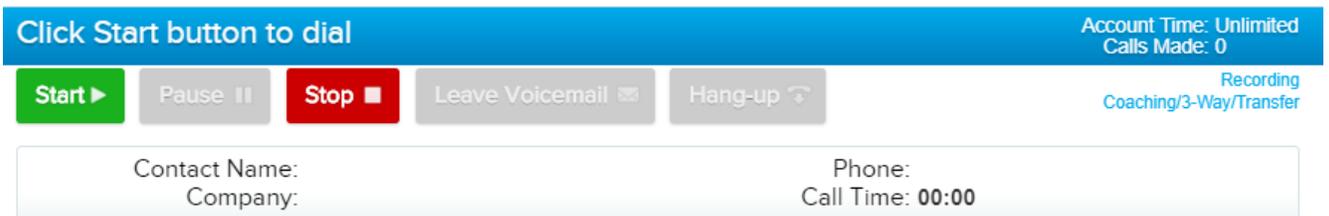
5. A red notification will appear above the lead list:

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!

The screenshot displays the 'Call Logic Dialing Campaign' interface. At the top, there's a blue header with 'In Call' status and account information: 'Account Time: Unlimited', 'Calls Made: 1', and 'Recording Coaching/3-Way/Transfer'. Below the header are control buttons: 'Start', 'Pause', 'Stop', and 'Hang-up'. A contact information box shows 'Contact Name: [Redacted]', 'Company: [Redacted]', 'Phone: [Redacted]', and 'Call Time: 00:15'. The 'Lead Log' section shows a timeline of events: 'Created By Brit Gal On Aug 29, 2017', 'Contacted By Jay Burkett On Oct 06, 2017 Reached in 38 days.', and 'Quoted By Jay Burkett On Dec 06, 2017 Reached in 99 days.'. Below the log is a '+ Add New Sticky Note' button. The main area is a form for 'Details' of 'Jessie Martinez (Lead Id: 15651-2707C60D-03CD-4733-A5BD-27C02D626597)'. The form includes fields for 'First Name', 'Middle Name', 'Last Name', 'Phone (Home)', 'Phone (Cell)', 'Lead Source' (Salesgenie), 'Address Line 1', 'Address Line 2', 'City', 'State', 'Email Address', 'Web Site', 'Policy Exp. Date', 'DOB', 'Marital Status', and 'ISM'. There are also checkboxes for 'Has Multiple Vehicles', 'Has Boat', 'Has Motorcycle', 'Has Auto(s)', 'Children in the Household', and 'Number Of Children'. A 'Lead Contact Information' popup shows 'Prospect Priority 3'.

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.