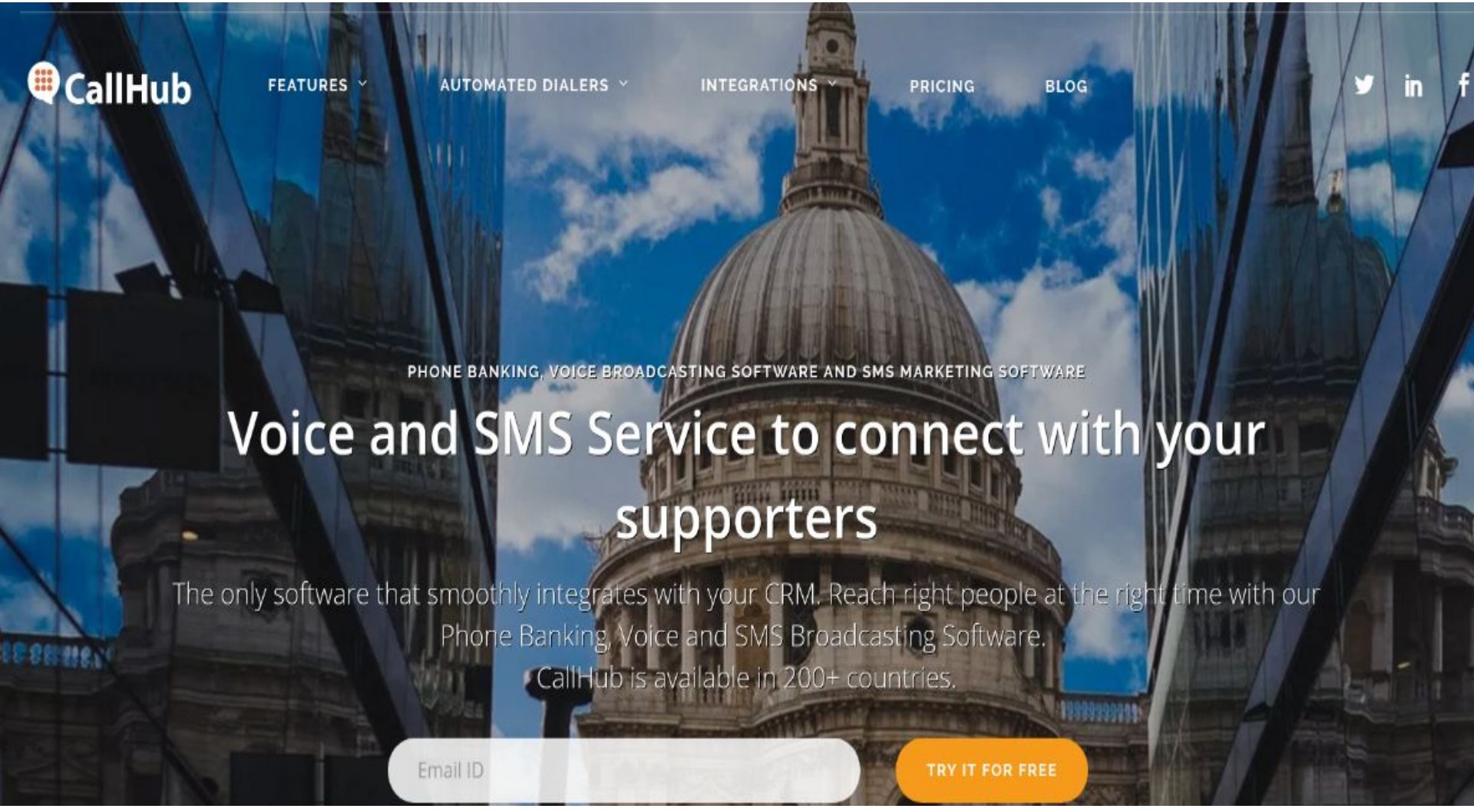
CallHub Integration with CiviCRM

Joe McLaughlin

PHONE
BANK
VOLUNTEERS

PHONE
BANK


CallHub
FEATURES
AUTOMATED DIALERS
INTEGRATIONS
PRICING
BLOG
PHONE BANKING, VOICE BROADCASTING SOFTWARE AND SMS MARKETING SOFTWARE
Voice and SMS Service to connect with your supporters
The only software that smoothly integrates with your CRM. Reach right people at the right time with our Phone Banking, Voice and SMS Broadcasting Software.
CallHub is available in 200+ countries.
Email ID
TRY IT FOR FREE

CIVICRM EXTENSION FOR CALLHUB PHONEBANKS

View Edit

CallHub is a hosted phone banking service that enables your staff to talk with your contacts over the phone banking campaign and store notes about the call. This extension integrates CallHub with CiviCRM by posting call dispositions and notes as CiviCRM activities attached to the contact record and assigned to the relevant staff person's record.

Author: Gaglers Inc

Maintainers: callhub

Used For:
CiviCRM - Core
Integration
CiviCampaign

How to integrate with CiviCRM

- Connect to CiviCRM
- How to assign CiviCRM Activity to campaigns
  - SMS Campaigns
  - Voice Broadcast Campaigns
  - Call Center Campaigns
- Viewing Activity Logs in CiviCRM

Connect to CiviCRM

1. Login to CallHub from Login. Once logged in, click on Integrations, you'll find it in the menu on the top of your

Set up steps 1

- Install the CallHub extension
- Create an account at CallHub.io
- Create Groups to call and Campaign in Civi

Set up steps 2

- Create phonebank in CallHub (a CallHub “campaign”
  - Import Civi Group
  - Import Civi Campaign name
  - Cut and paste your “script”

Set up steps 3

- Create “Agents” in CallHub (using existing CiviCRM users - staff, volunteers)
- Agents make calls to Group(s)
- Call info recorded back into Civi

CiviCRM

hide

CIVICRM

This app lets you call or text to a CiviCRM contact group.

Organizations typically use it for outreach programs, reminders, confirmations and verifications.

Connected to CiviCRM Site:
https://my.citizenactionny.org/sites/all/modules/civicrm/extern/rest.php

View and Import Groups... | Revoke Access

Zapier

hide

zapier

You can do so much more with CallHub by connecting it to the other apps you

Shopify

hide

shopify

This app lets you call or text to your Shopify customers instantly. Talk to your

Manage Groups For CiviCRM: 'Https://My.Citizenactionny.Org/Sites/All/Modules/Civicrm/Extern/Rest.Php'

Select Groups For Import

Type to search CiviCRM Groups

- PCM_CANY_652
- PCM_RPI_653
- PCM_DELMAR_654
- PCM_SARATOGA_656
- PCM_SCHENECTADY_657
- SYR_Mems_6_18_864

CiviCRM Refresh Status

Campaigns found	47
Groups found	1148
Events found	344
Time since last refresh	0 minutes

Refresh Now

Refresh lets you synchronize CiviCRM groups and events

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Contacts

Actions ▾ | + New Contact | + Import Contacts | Phonebooks | Do Not Call

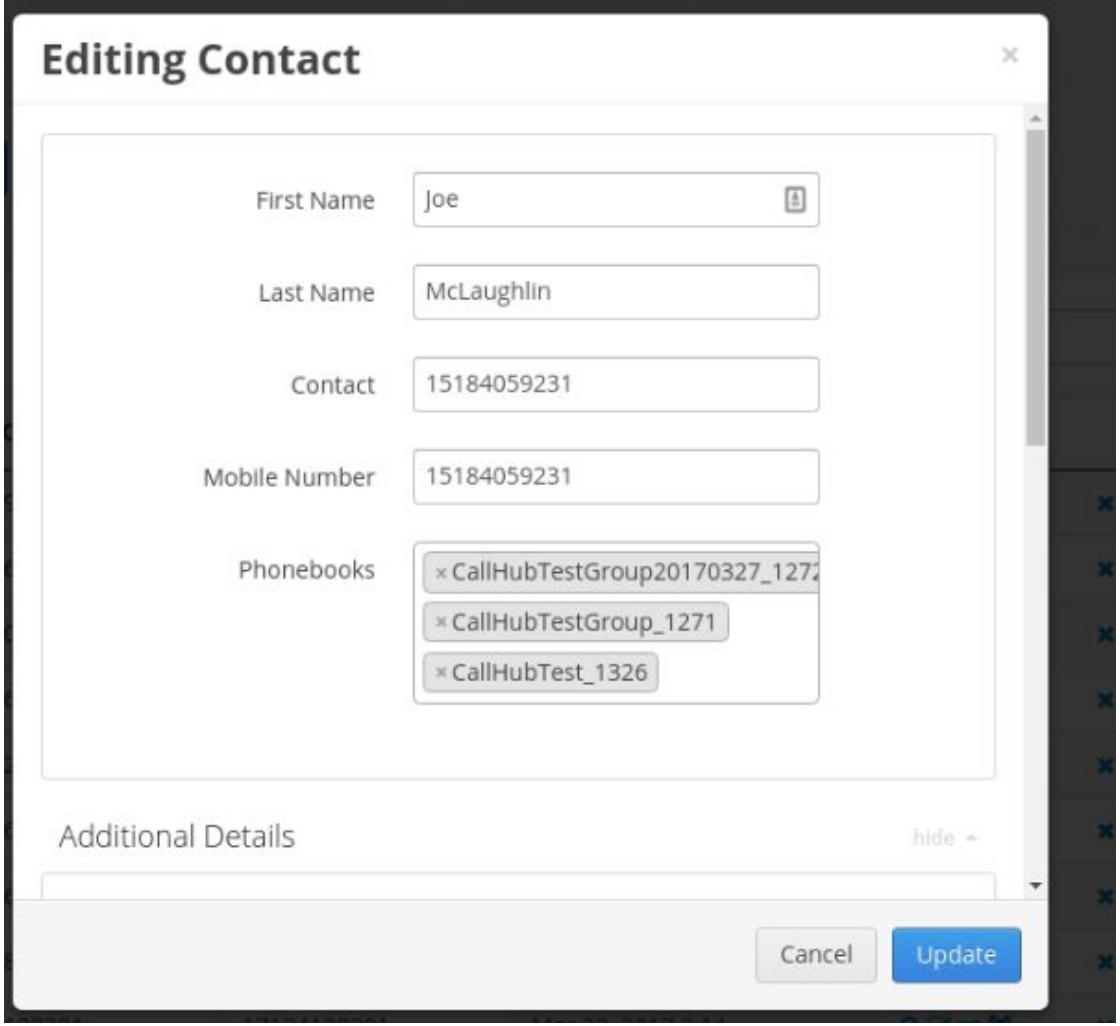
Create Phonebook from Search

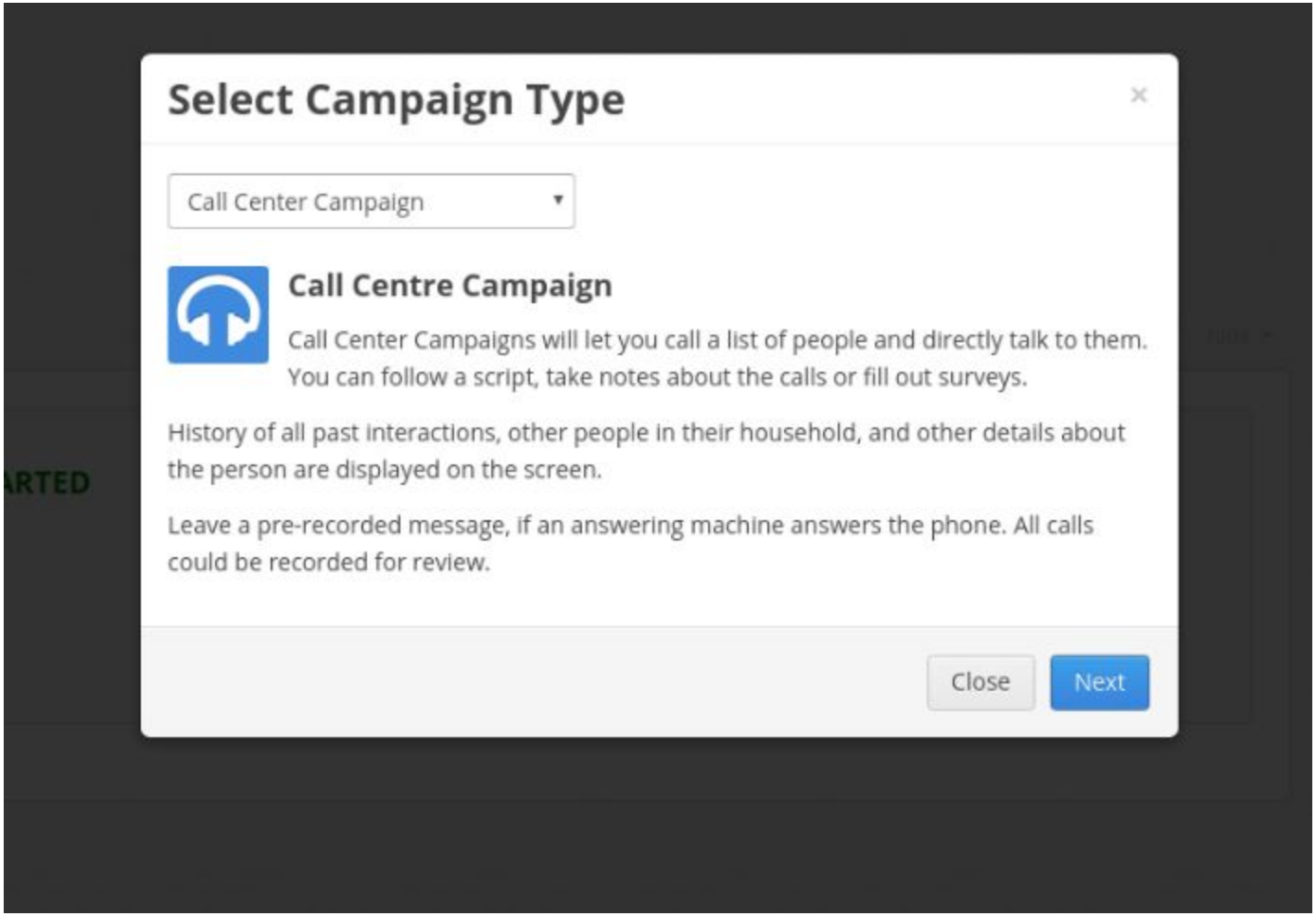
Search:

	First Name	Last Name	Contact No.	Mobile No.	Created Date	Action
☐	Charlie				Apr 13, 2017 5:53	
☐	Thaddeaus				Apr 13, 2017 5:53	
☐	Callie				Mar 27, 2017 18:15	
☐	Kristina				Mar 27, 2017 18:15	
☐	Ariela				Mar 27, 2017 18:15	
☐	Stanley				Mar 27, 2017 18:15	
☐	Anthony				Mar 27, 2017 18:15	
☐	Roberto				Mar 27, 2017 18:15	
☐	Rosie				Mar 23, 2017 3:14	
☐	Joe				Mar 21, 2017 23:40	

Showing 1 to 10 of 10 entries

Previous 1 Next


Editing Contact
First Name
Joe
Last Name
McLaughlin
Contact
15184059231
Mobile Number
15184059231
Phonebooks
CallHubTestGroup20170327_1272
CallHubTestGroup_1271
CallHubTest_1326
Additional Details
hide
Cancel
Update


Select Campaign Type
Call Center Campaign
Call Centre Campaign
Call Center Campaigns will let you call a list of people and directly talk to them. You can follow a script, take notes about the calls or fill out surveys.
History of all past interactions, other people in their household, and other details about the person are displayed on the screen.
Leave a pre-recorded message, if an answering machine answers the phone. All calls could be recorded for review.
Close
Next

All Campaigns

Actions ▾ | New Campaign

Show 10 entries | Search:

	Type	Name	Create Date	Start Date	Expiration	Status	Actions
☐		CallCenter Campaign, May 09, 09:37	May 9, 2017 9:38	May 9, 2017 9:37	May 10, 2017 9:37	STARTED	
☐		CallCenter Campaign, Apr 12, 22:54	Apr 12, 2017 22:56	May 9, 2017 11:00	May 10, 2017 11:00	STARTED	
☐		TestCampaign20170329JoeToRosie	Mar 29, 2017 17:32	Mar 29, 2017 17:32	Mar 30, 2017 17:32	STOPPED	
☐		CallHubTest20170327	Mar 27, 2017 11:22	Mar 29, 2017 15:00	Mar 30, 2017 15:00	STOPPED	
☐		CallCenter Campaign, Mar 26, 18:40	Mar 26, 2017 18:41	Mar 26, 2017 18:40	Mar 27, 2017 18:40	STOPPED	
☐		Test Campaign 20170325	Mar 21, 2017 17:58	Mar 29, 2017 17:00	Mar 30, 2017 17:00	STOPPED	
	-Filter by ▾	Filter Name	Filter Create Da	Filter Start Date	Filter Expiration	-Filter by ▾	

All Campaigns

Actions ▾ New Campaign

Show 10 entries Search:

	Type	Name	Create Date	Start Date	Expiration	Status	Actions
☐		CallCenter Campaign, May 09, 09:37	May 9, 2017 9:38	May 9, 2017 9:37	May 10, 2017 9:37	STARTED	
☐		CallCenter Campaign, Apr 12, 22:54	Apr 12, 2017 22:56	May 9, 2017 11:00	May 10, 2017 11:00	STARTED	
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☐		CallHubTest20170327	Mar 27, 2017 11:22	Mar 29, 2017 15:00	Mar 30, 2017 15:00	STOPPED	
☐		CallCenter Campaign, Mar 26, 18:40	Mar 26, 2017 18:41	Mar 26, 2017 18:40	Mar 27, 2017 18:40	STOPPED	
☐		Test Campaign 20170325	Mar 21, 2017 17:58	Mar 29, 2017 17:00	Mar 30, 2017 17:00	STOPPED	
	-Filter by ▾	Filter Name	Filter Create Da	Filter Start Date	Filter Expiration	-Filter by ▾	

AGENTS
NUMBERS
CONTACTS
PHONEBOOKS
AUDIO FILES
REPORTS
DO NOT CALL
ANALYTICS NEW!

Change Call Center Campaign

1 Script | 2 Contacts | 3 Agents | 4 Settings | 5 Schedule

Caller ID

15184059231 + Add

Answering Machine

Enable Audio Drop for Answering Machine

Note: Enable Answering Machine for campaigns with Predictive or Auto Dialing

Script

Normal text | **Bold** | *Italic*

testing 1-2-3

Call Disposition

+ Enable Call Disposition

Questions

+ Add Supporter Level

+ Add Multi-Choice Response | + Add Text Response | + Add Number Response

Change Call Center Campaign

1 Script | 2 Contacts | 3 Agents | 4 Settings | 5 Schedule

Phonebook

CallHubTest_1326

Hold down "Control", or "Command" on a Mac, to select more than one.

← Prev | Next →

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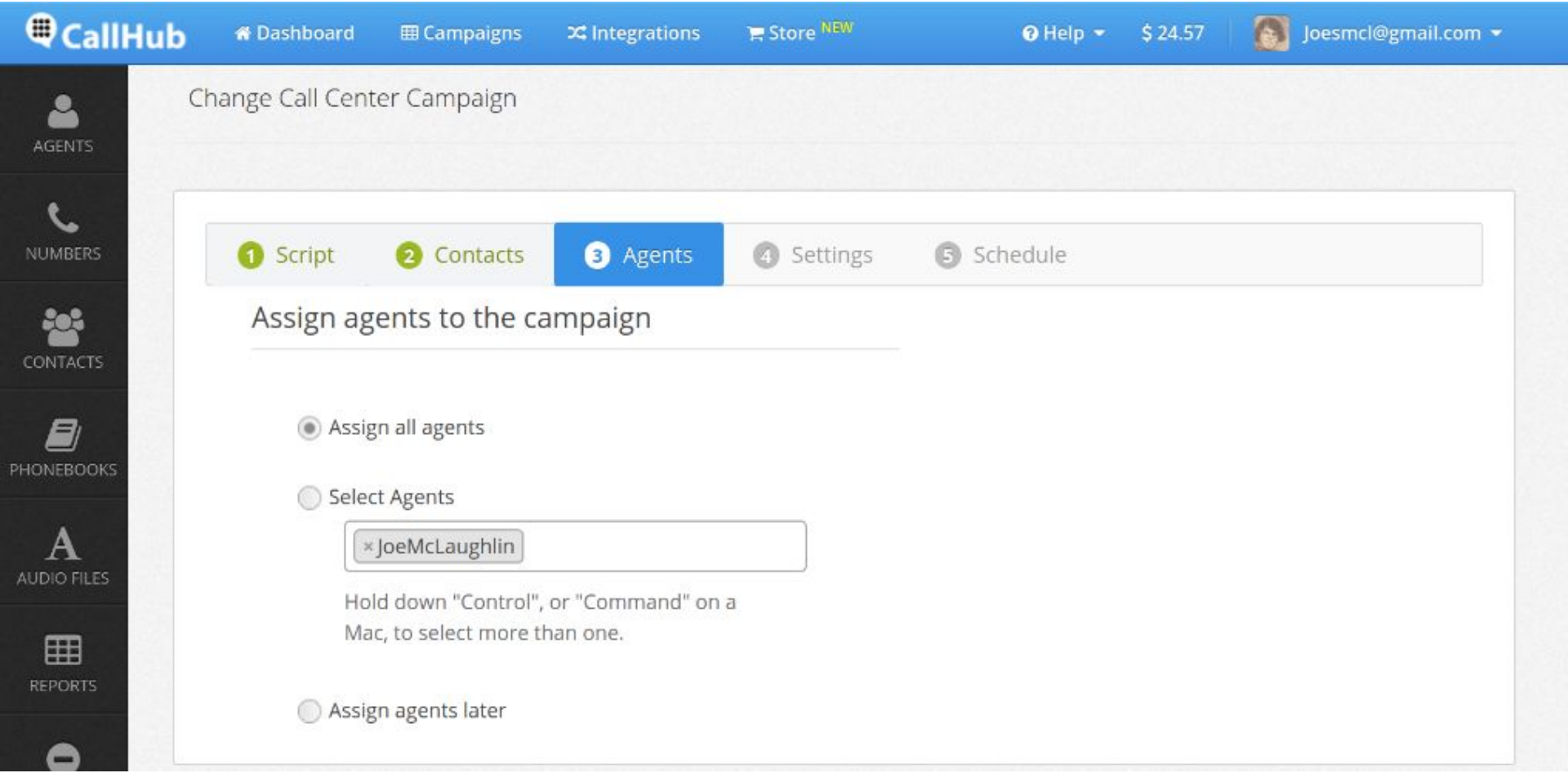

CallHub
Dashboard
Campaigns
Integrations
Store NEW
Help
$ 24.57
Joesmcl@gmail.com
AGENTS
NUMBERS
CONTACTS
PHONEBOOKS
AUDIO FILES
REPORTS
Change Call Center Campaign
1 Script
2 Contacts
3 Agents
4 Settings
5 Schedule
Assign agents to the campaign
Assign all agents
Select Agents
× JoeMcLaughlin
Hold down "Control", or "Command" on a Mac, to select more than one.
Assign agents later

1 Script | 2 Contacts | 3 Agents | 4 Settings | 5 Schedule

General Settings

- [x] Notes Required

Require to add Notes for Calls made

- [ ] Record Calls

All connected calls will be recorded

Name

CallCenter Campaign, Apr 12, 22:5

- [ ] Patch-Through Calling

Dial-In Settings

Dial-in Number

No Dialin

Dialer Settings

Max Retries

Time Between Retries

Max Call Duration

1800

Maximum call duration in seconds. Limit is 7200

Dialing Options

Predictive Dialer

Power Dialer

Auto Dialing

1 : 1

Dialer call rate limit is 3. If dialer restrictions apply,limit is 1

Enable Drop Restrictions

CiviCRM Activity

CiviCRM Campaign

CallHubTestCampaign

Choose the campaign the activity is part of

Activity Type

Phone Call

Choose how to log this activity. Default is no logging

← Prev Next →

1 Script 2 Contacts 3 Agents 4 Settings 5 Schedule

Campaign Duration

Start

2017-04-12 22:54:11

Date format: YYYY-mm-DD HH:MM:SS

Finish

2017-04-13 22:54:11

Date format: YYYY-mm-DD HH:MM:SS

Week Days

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Pick Campaign Time

Daily Start Time

00:00:00

Time format: HH:MM:SS

Daily Stop Time

23:59:59

Time format: HH:MM:SS

Call Center Campaign - CallCenter Campaign, Apr 12, 22:54 - STARTED

"CallCenter Campaign, Apr 12, 22:54" updated. Modify assigned agents now. ×

▶ Start | ⏸ Pause | ■ Stop | Duplicate... | Change... | ✖ Delete

Overview | Script | Settings | Agents | Result

20.0%	20.0%	0.0%	0.0%	80.0%	15%
1 Completed	1 Live Answer	0 Dropped	0 Retry Pending	4 Pending	Agent Occupancy Rate

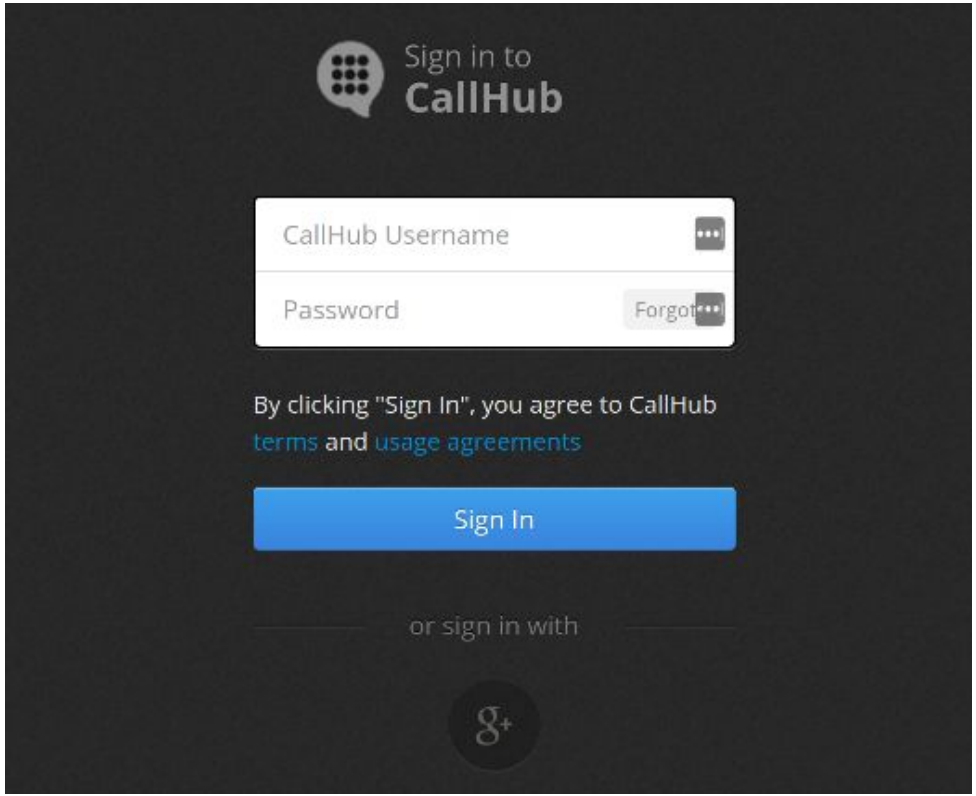
Agents

Name	No. of Calls	Live Answer	Total Time	Talk Time	Status
JoeMcLaughlin (JoeMcLaughlin)	1	1	00:52	00:08	Not connected

Cost

$ 0.03 Total Cost

“Agent” (staff/volunteer) log in page



My Campaigns

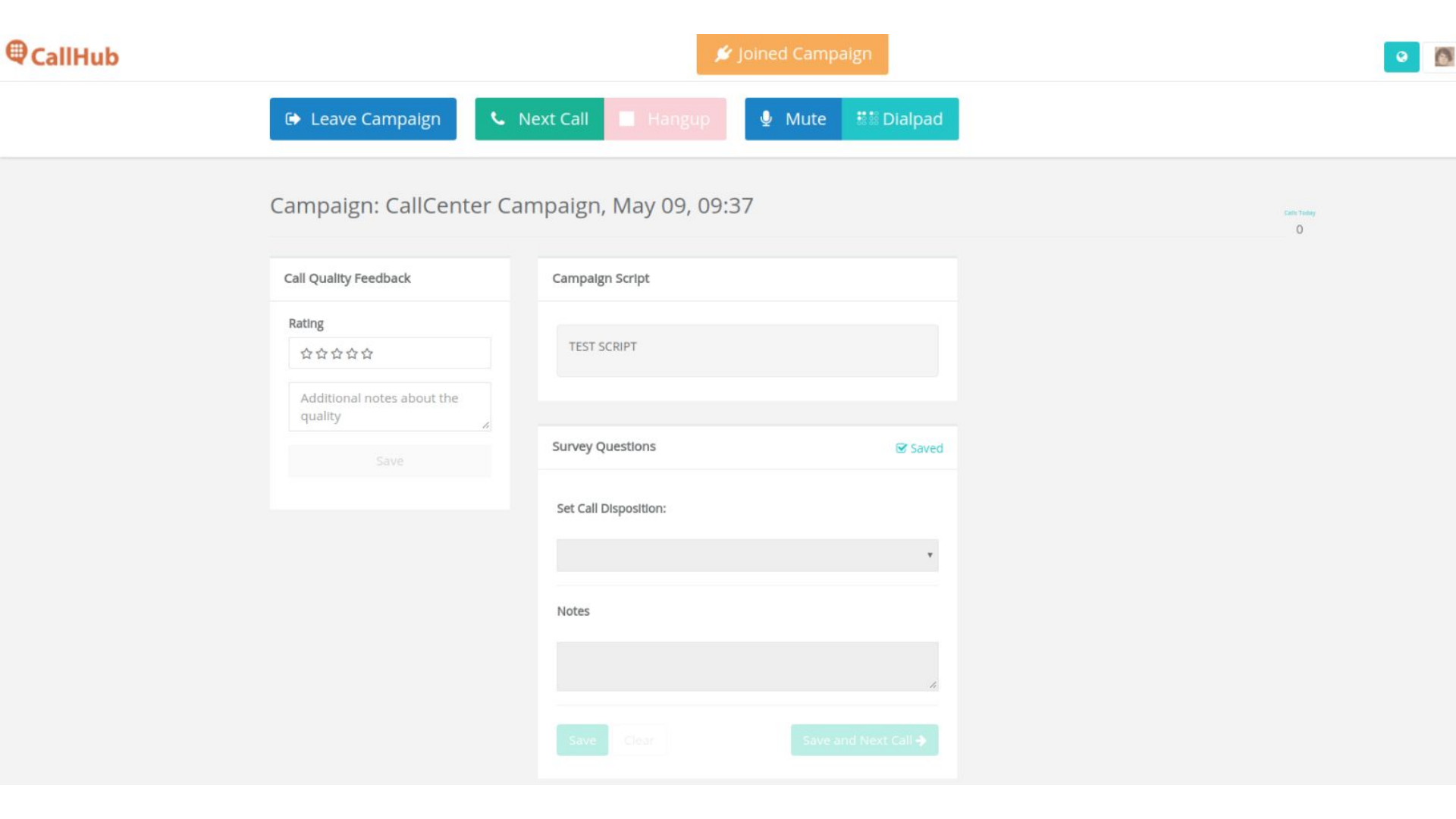
Reload Campaigns

Show 10 entries Search:

Campaign Name	Capabilities	Total Contacts	Completed	Remaining	Campaign Status
CallCenter Campaign, May 09, 09:37	✖	5	0	5	Running
CallCenter Campaign, Apr 12, 22:54	✖	5	1	4	Running

Showing 1 to 2 of 2 entries

Previous 1 Next


CallHub
Joined Campaign
Leave Campaign
Next Call
Hangup
Mute
Dialpad
Campaign: CallCenter Campaign, May 09, 09:37
Calls Today
0
Call Quality Feedback
Rating
Additional notes about the quality
Save
Campaign Script
TEST SCRIPT
Survey Questions
Saved
Set Call Disposition:
Notes
Save
Clear
Save and Next Call

CallHub

On Call

JoeMcLaughlin

Leave Campaign | Next Call | Hangup | Mute | Dialpad

Campaign: CallCenter Campaign, May 09, 09:37

Calls Today
0

Joe McLaughlin
Data & Comms Coordinator
Citizen Action of New York
[redacted]
P: 15184059231
M: 15184059231
joesmcl@gmail.com

Call Quality Feedback

Rating

☆☆☆☆☆

Additional notes about the quality

Campaign Script

TEST SCRIPT

Survey Questions

Set Call Disposition:

USER_BUSY

Notes

USER_BUSY

Save | Clear | Save and Next Call

Contact History

Call Center Conversation with Agent 5

Notes
try again — a month ago

Call Center Conversation with Agent 6

Set Call Disposition:
ANSWER — a month ago

Call Center Conversation with Agent 7

Notes
test 123456 20170325 — a month ago

Call Center Conversation with Agent 8

Select Supporter Level:
1 - Strong Support — a month ago

Joe McLaughlin

Actions | Edit | Delete Contact

Summary | Contributions 563 | Memberships 1 | Events 69 | Activities 15370 | Mailings 16 | Relationships 10 | Groups 127 | Notes 0 | Tags 6 | Change Log | Codes Redeemed 0 | State Lege and CD 3 | Volunteer Roles | Summary Fields

+ New Activity

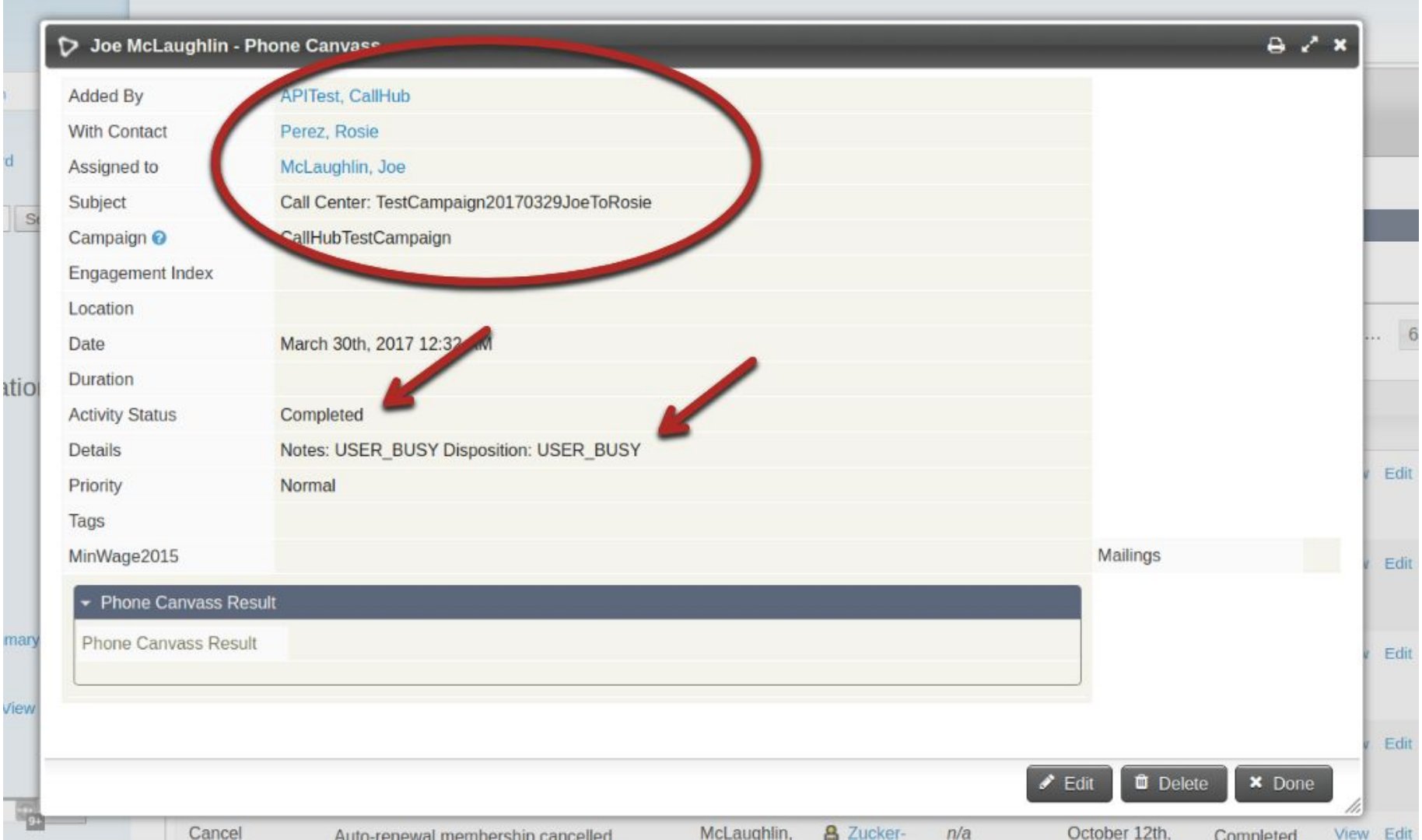
Filter by Activity Type

Include - all activity type(s) - Exclude - select activity type -

Show 25 entries

First Previous 1 2 3 4 5 ... 615 Next Last

Type	Subject	Added By	With	Assigned	Date	Status	
Phone Canvass	Call Center: TestCampaign20170329JoeToRosie	APITest, CallHub		McLaughlin, Joe;	March 30th, 2017 12:32 AM	Completed	View Edit Delete
Phone Canvass	Call Center: TestCampaign20170329JoeToRosie	APITest, CallHub	McLaughlin, Joe	McLaughlin, Joe;	March 30th, 2017 12:32 AM	Completed	View Edit Delete
Phone Canvass	Call Center: CallCenter Campaign, Mar 26, 18:40	APITest, CallHub	McLaughlin, Joe	*n/a*	March 26th, 2017 9:44 PM	Completed	View Edit Delete


Joe McLaughlin - Phone Canvass
Added By
APITest, CallHub
With Contact
Perez, Rosie
Assigned to
McLaughlin, Joe
Subject
Call Center: TestCampaign20170329JoeToRosie
Campaign
CallHubTestCampaign
Engagement Index
Location
Date
March 30th, 2017 12:32
Duration
Activity Status
Completed
Details
Notes: USER_BUSY Disposition: USER_BUSY
Priority
Normal
Tags
MinWage2015
Mailings
Phone Canvass Result
Phone Canvass Result
Edit
Delete
Done

CIVICRM EXTENSION FOR CALLHUB PHONEBANKS

View Edit

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This repository Search Pull requests Issues Gist

callhub / **io.callhub.phonebanking**

Unwatch 5 Unstar 1 Fork 0

Code Issues 0 Pull requests 0 Projects 0 Wiki Pulse Graphs

CiviCRM Extension for CallHub Phonebanks https://callhub.io/civicrm-extension/

civicrm-extensions civicrm

4 commits **1** branch **1** release **1** contributor AGPL-3.0

Branch: **master** New pull request Create new file Upload files Find file Clone or download

augfrank downloadUrl is not necessary Latest commit `9dabb15` on Mar 31

CRM/Phonebanking	CiviCRM Extension for CallHub Phonebanks	a month ago
sql	CiviCRM Extension for CallHub Phonebanks	a month ago
LICENSE.txt	CiviCRM Extension for CallHub Phonebanks	a month ago
README.md	Updated README	a month ago
info.xml	downloadUrl is not necessary	a month ago

How to integrate with CiviCRM

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- How to assign CiviCRM Activity to campaigns
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- Viewing Activity Logs in CiviCRM

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https://CallHub.io

Joe McLaughlin
Irvine, California, United States
joesmcl@gmail.com
5184059231
Visit website

Partner since 2017

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