I thought again, and here is my proposal to maintain the same logic of ***Campaigns*** and ***Files***

**Referrals & Follow-Ups**

1. Other ***Contact*** (Referrals)
   * Only “during” the call
   * Agent can choose from any ***Campaign*** that
     + a) accepts ***referrals***
     + b) is enabled for the ***Team***
   * Inserted ***Contact***
     + Is flagged: ***referral*** (see below)
     + is flagged with the ***User.id***
     + is set for a callback on the time chosen by the ***Agent*** (standard callback selector)
     + contains relevant context information entered by the ***Agent*** (text shall be partially generated by the system, for example: **“Referral from ‘John Doe’ in ‘Fiber’ campaign on 2022-08-31 at 12:30.<br>” + <free text entered by agent>**)
   * Shall ensure that
     + The referred ***Contact*** is not in a recent file (a meaningful should then be displayed)
       - We can configure at ***Brand*** level how many days back we check ***Contacts*** to consider that we can add a new ***Contact*** as a referral
     + The referred ***Contact*** is not the called ***Contact*** (a meaningful should then be displayed)
2. same ***Contact*** (Follow-Ups)
   * Only at the “end” of the call
   * Both in case of success & non-success
     + Success: We might want to x-sell later
     + Non-success (only for Call Reason Level 1 = ***lost***, which corresponds to argumented calls that did not result in a sale, all calls automatically assigned a failure code shall be ignored) : Contact might become eligible later or whatever…
   * Agent can choose from any ***Campaign*** that
     + a) accepts ***follow\_ups***
     + b) is enabled for the ***Team***
   * Inserted ***Contact***
     + Is flagged: ***follow\_up*** (see below)
     + is flagged with the ***User.id***
     + is set for a callback on the time chosen by the ***Agent*** (by default, date is set to the next Tuesday in 4 months from now)
     + contains relevant context information entered by the ***Agent*** (text shall be partially generated by the system, for example: **“Follow-up call for ‘John Doe’ from ‘Fiber’ campaign on 2022-08-31 at 12:30.<br>Call outcome: [Level 3 text]: [Level 4 Details]<br>” + <free text entered by agent>**)

**After-Sales & Back-Office**

1. same ***Contact*** only
   * Only at the “end” of the call
   * Only in case of success
   * Agent can choose from any ***Campaign*** that
     + a) accepts ***after\_sales***
     + b) is enabled for the ***Brand***
     + no constraint on the team shall be applied, if the team is not enabled for such a campaign, this ***Contact*** shall be re-allocated
   * Inserted ***Contact***
     + Is flagged: ***after\_sale*** (see below)
     + is flagged with the ***User.id***
     + is set for a callback on the time chosen by the ***Agent*** (by default, date is set to the next day)
     + contains relevant context information entered by the ***Agent*** (text shall be partially generated by the system, for example: **“After-Sale for ‘John Doe’ from ‘Fiber’ campaign on 2022-08-31 at 12:30.<br>Order ID: [Level 4 Details]<br>” + <free text entered by agent>**)
       - ex: Customer did not have a document ID, Fiber OTO ID must be added…

**Inbound**

1. Existing ***Contact*** 
   * Definition
     + **Person** called back one of our number (active or in quarantine)
     + Phone number used to call back is found on a ***Contact*** in 1 of the ***File*** associated to the ***Campaign*** itself associated to the number called
     + ***Contact*** was last called less than 30 days ago (configurable in the admin)
   * New ***Call*** is inserted in the matching ***File***
   * New ***Callback*** is scheduled in the matching ***File*** and associated to the ***Team*** that last call the ***Contact*** (only if none is already scheduled)
   * ***FeedbackReason*** set to open/callback/inbound (see updated Reasons file)
   * ***Call*** flagged as ***Inbound***
2. ***Contact*** not found
   * New ***Contact*** inserted in a default “Inbound (orphaned)” ***File*** attached to the ***Campaign*** to which the called number belongs
   * New ***Call*** is inserted in the matching ***File***
   * New ***Callback*** is scheduled in the matching ***File*** and associated to the ***Team*** that last call the ***Contact*** (only if none is already scheduled)
   * ***FeedbackReason*** set to open/callback/inbound (see updated Reasons file)
   * ***Call*** flagged as ***Inbound***

**Other implications**

* ***Brands*** shall
  + be created by default with a “Prospection” ***Campaign*** which ***disabled***
  + be created by default with a “Loyalty” ***Campaign*** which ***disabled***
  + be created by default with a “Cross-Sell” ***Campaign*** which ***disabled***
  + be created by default with a “After Sales & Back-Office” ***Campaign*** which ***disabled*** and a “After Sales & Back-Office” ***File*** which is ***enabled*** and allowing new entries ***after\_Sale***
* ***Campaigns*** shall
  + be created by default with a “Referral & Follow-Up” ***File*** (except “After Sales & Back-Office”) which is ***enabled*** and allowing new entries ***referral*** and ***follow\_up***
  + be created by default with a “Inbound (orphaned)” ***File*** which is ***enabled*** and allowing new entries ***inbound***
* ***File*** shall have
  + a flag to indicate if they support adding new ***Contacts***: ***true | false*** and or…
  + …some description (json? Various flags?) of which methods are allowed: ***file | referral | follow\_up | api | manual | after\_sale | inbound***
    - I currently tend to like better 6 different flags, each with a true / false value. This will facilitates look-ups and easily allow any combination
  + Default for any upload is ***false*** (or not allowing any new entry)
  + There shall be a splitting logic
    - Which is a default that can be overwritten when importing files (per language & partner + per language & team)
    - Which defines the real-time allocation for all dynamic entries (per language & partner + per language & team)
* ***Contact*** shall have
  + a ***date\_inserted***. For Contacts coming from a ***File*** upload, the date is the same as the ***File*** upload date
  + an ***origin*** field with one of the following values: ***file | referral | follow\_up | api | manual | after\_sale***
  + a ***user\_id*** field to flag ***Users*** that shall handle ***referrals***, ***callbacks***, and ***after\_sales***
  + if the ***Agent*** / ***Team*** / ***Partner*** is not enabled for a certain type of ***Campaign*** (typically ***after***\_***sale***), the ***Contact*** shall be re-allocated by going to the nearest level above which is enabled (first see if another ***Team*** for the same ***Partner*** can process the ***Contact***, otherwise look for another ***Partner***)
  + the ***callback\_date*** since we may want to insert contacts already with a callback
* ***Calls*** shall have
  + A flag indicating if the call was incoming or outgoing
  + For Incoming calls
    - If the call is handled directly, the normal call reasons apply.
      * WATCH-OUT: the logic to identify who terminates the call remains unchanged, this means, it is NOT based on the “caller” and “callee”, but refers to whether an “agent” or a “contact” hangs-up the call
    - If the call is not handled, it is flag with reason “callback/incoming” and a callback is automatically scheduled (if none was already scheduled) with a memo indicating that the contact called back on this date/time following an outbound call on that other date/time
    - As for any call, the associated ***Contact*** shall be updated with the latest call reason
* ***Callback table*** shall be removed (integrated within a contact)

I believe that by doing so, we keep the logic:

* after all, an “After Sale” or “Back-Office” campaign is just like another campaign, we need to call all the people and ensure we close the case, what is a success as well. And as for other campaigns, we may need to schedule new callbacks, handle inbound calls and so on
  + good thing: we will also have statistics on case closing rates 😉
* Same for Referrals and follow-ups, they are standard leads, so we need to handle them properly and ensure they also show properly in all reports.
* We properly handle inbound calls in a manner fully consistent with other campaigns

Cheers,

Yann