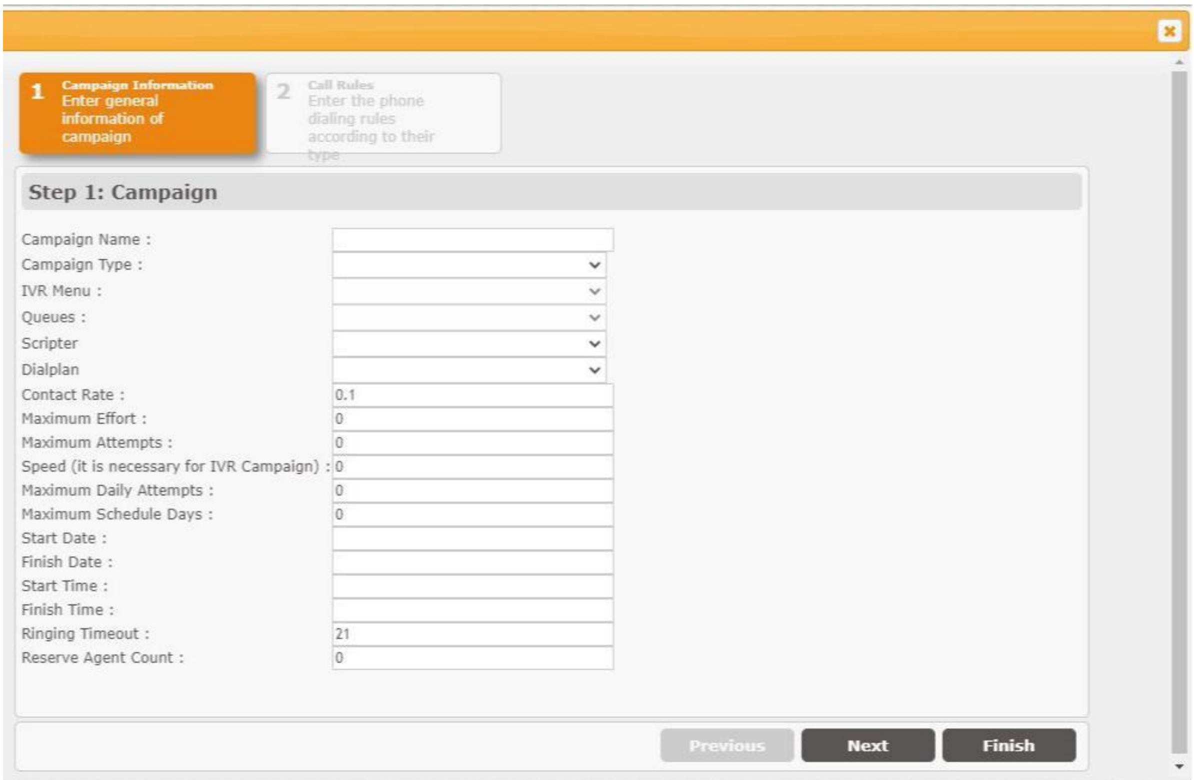
Campaigns

Adding a Campaign

1. Click the add button,  , located on the top right corner of the screen. The following pop-up will appear:



1. Click the “Campaign Name” input box, type the desired campaign name. An example is shown below:

2. Click the "Campaign Type" dropdown box the following selections will appear:

Predictive	A campaign that uses the scripter and agents answer outbound calls performed by the campaign's assigned dialer. For progressive dialers, predictive should be selected, and the default speed should be 1.
IVR	A campaign that makes calls answered by the IVR.

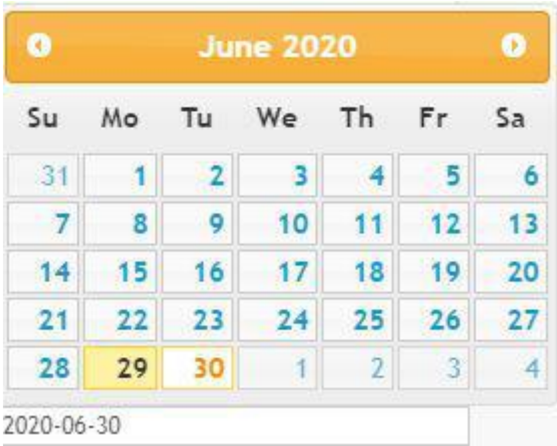
3. Select "Predictive" or "IVR" whichever is desired
4. Click the "Queues" dropdown menu, select the desired queue (Note: only used for a predictive campaign).
5. Click the "Scripter" dropdown menu, select the desired scripter. (Used as agent's script when performing the campaign).
6. Click the "Dialplan" dropdown box, select the desired dialplan.
7. Click the "Contact Rate" input box. The contact rate is set up by default for a 1 to 1 delivery ratio. However, it can be customized if desired.

8. Click the “Maximum Effort” input box type the desired amount of redials for reached contacts.
9. Click the “Maximum Attempts” input box, type the desired amount of redials for the campaign contacts.
10. Click the “Speed (it is necessary for IVR Campaign)” input box. This value is multiplied by available agent count in the campaign queue. Max value is 5 for Predictive, and 10 for IVR. For small scale operations, the default value is recommended. Type the desired value.
11. Click the “Maximum Daily Attempts” input box, type the daily redial limit.
12. Click the “Maximum Schedule Days” input box, type the maximum schedule days.
13. Click the “Start Date” input box, which indicates the start date of the campaign. Click on the rectangular bar beside the start date column, and a calendar will popup. Choose the preferred dates on the calendar, as shown below:

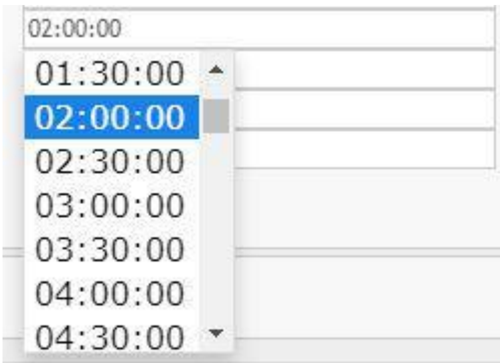
14. Click the "Finish Date" input box, which indicates the end date of the campaign.

    Click on the rectangular bar beside the finish date column, and a calendar will popup.

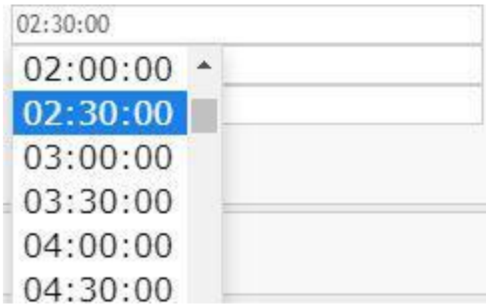
    Choose the preferred dates on the calendar, as shown below:



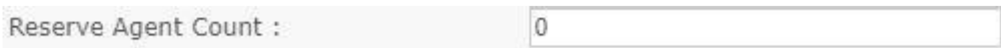
15. Click the "Start Time" input box, which signifies the predetermined time for the campaign to start. The time is set, as shown below:



16. Click the “Finish Time” input box, which indicates the predetermined time to end a campaign. The time is set, as shown below:

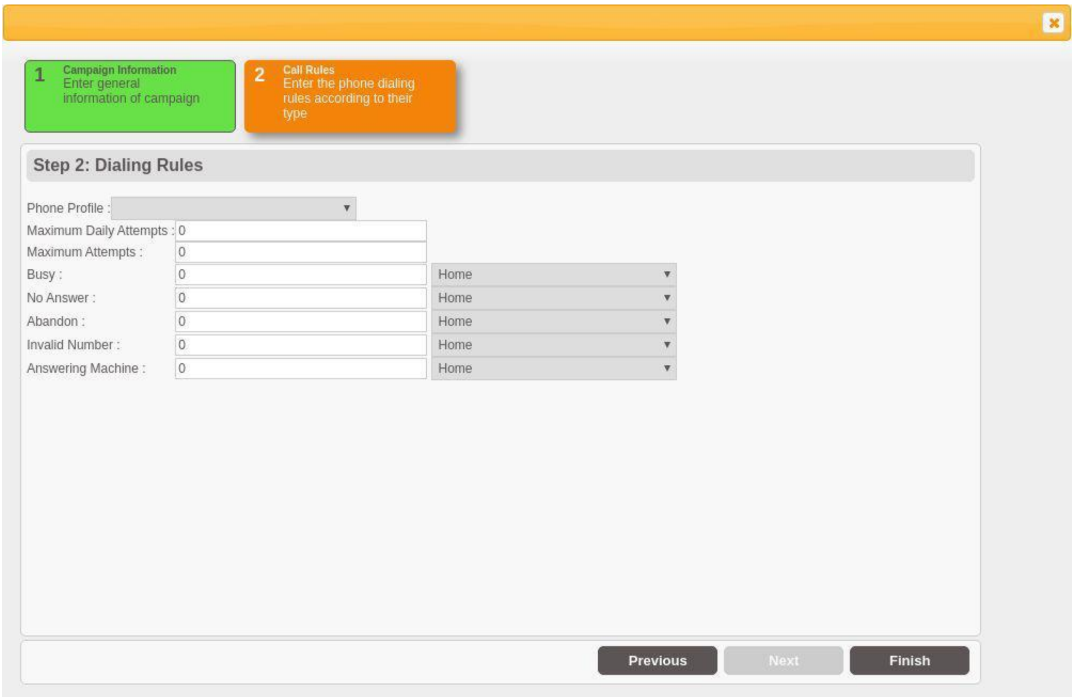


17. Click the “Ringing Timeout” input box, type the desired timeout (ringing timeout is in seconds and can be adjusted).
18. Click the “Reserve Agent Count” input box, which is set as shown below (The number of reserve agents on the campaign, for example, there are 20 available agents, if the reserve agent count is 5, 15 agents will receive dialer calls based on the campaign.

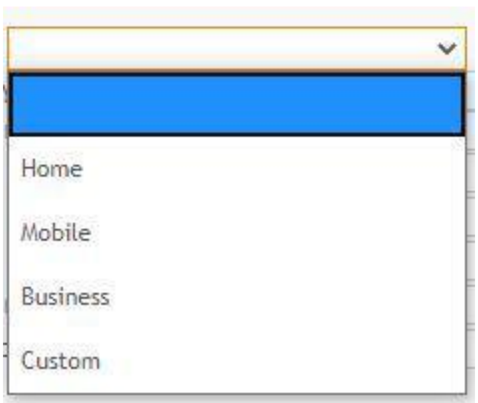


19. Click the Next button, 

. The following screen will be displayed:



20. Click the "Profile Name" input box, which indicates the profile name of the campaign. It is selected by clicking on the blank space beside the profile name bar shown below (Note: At least one profile type needs to be filled out completely to finish creating the campaign):



21. Click the “Maximum Daily Attempts” input box, representing the number of redial attempts in a day.
22. Click the “Maximum Attempts” input box, representing the overall number of redial attempts of the campaign.

The following delays are based in minutes (steps 4-8). For example, if a busy tone is reached, and if “4” was inputted in the busy tone input box. Then, there will be a 4-minute delay before the next call is made.

Click the “Busy” input box, which is set, as shown below:

Click the “No Answer” input box whichis set as shown below:

Click the “Abandon” input box, which is set, as shown below:

Click the “Invalid Number” input box which**is**set as shown below:

Click the “Answering Machine” input box, which is set, as shown below:

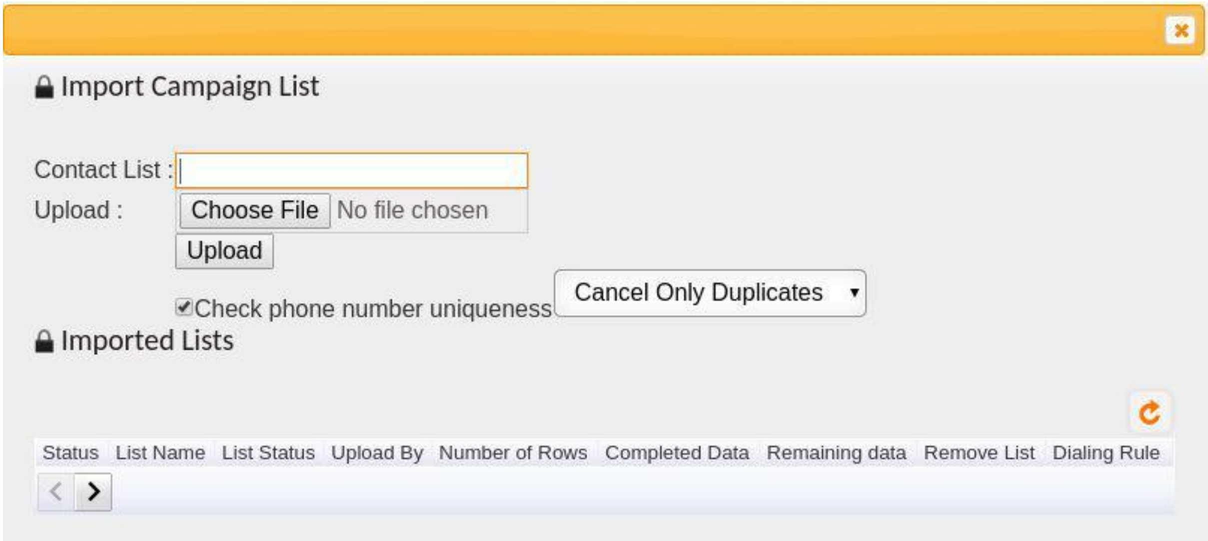
23. To finish setting up the campaign, click on the finish button, 

. The following pop-up will appear:

Uploading Campaign Contact List

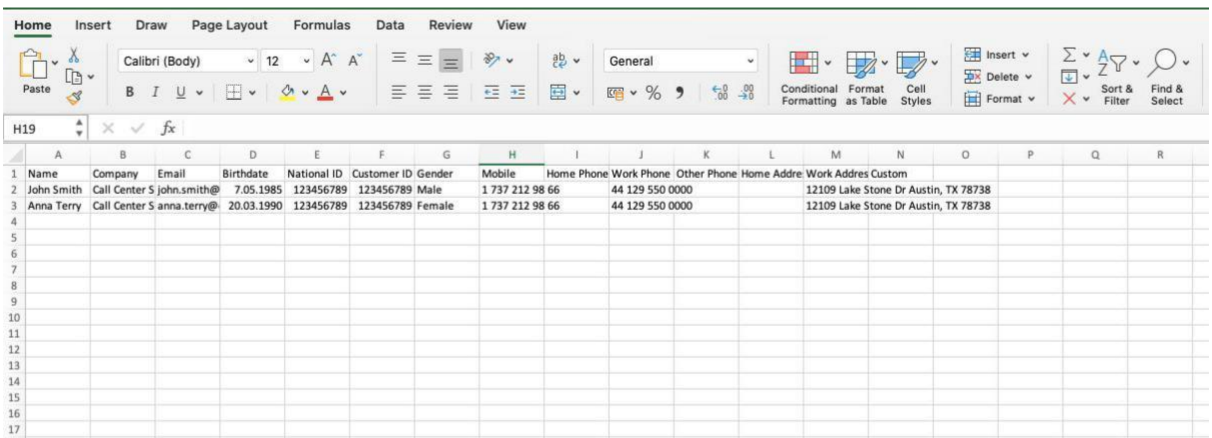
1. Click on the upload button, located to the right of the desired campaign name.

   The following pop-up window will appear:

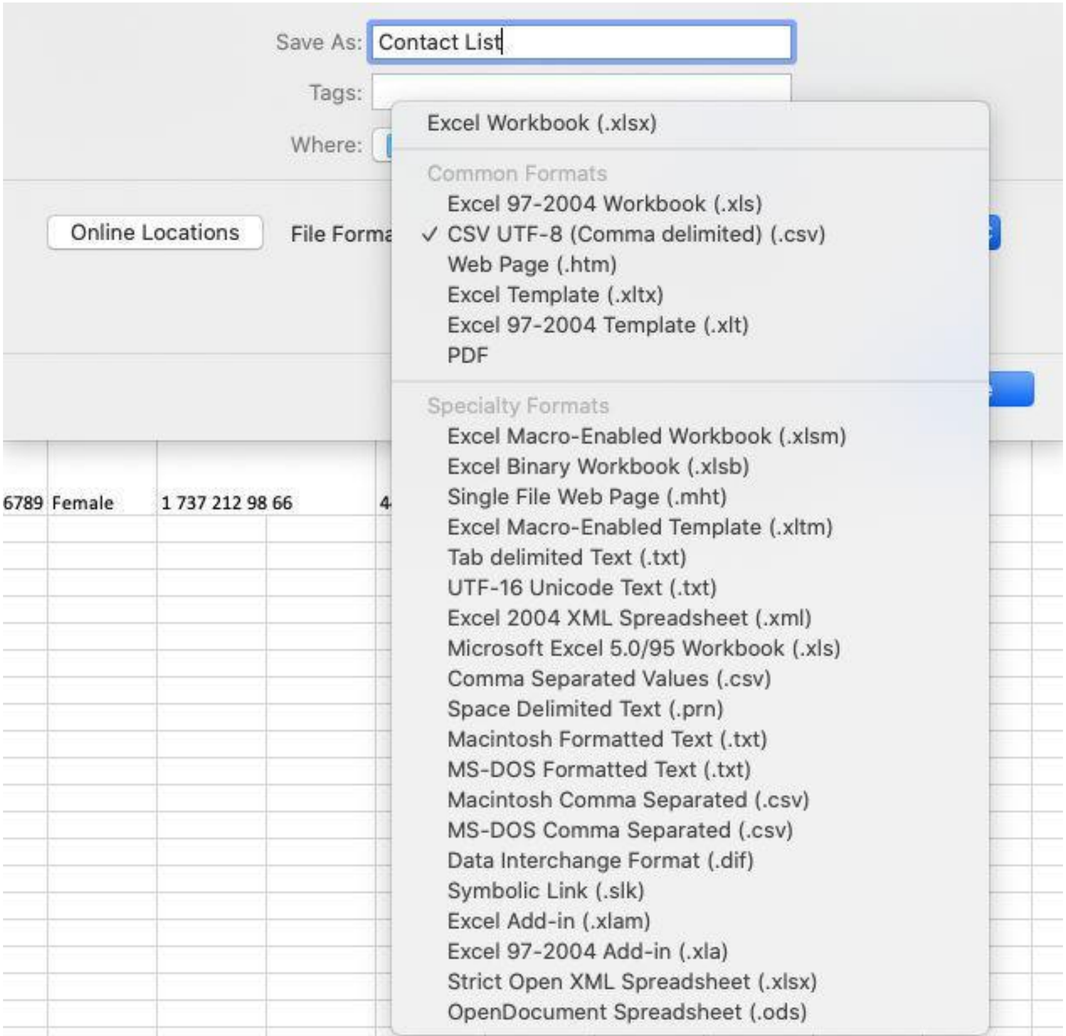


2. Click the “Contact List” input box, type the desired contact list name.
3. Data to be uploaded should be in .CSV format. Create a file using the instructions below:

   A. Write your contact list in an excel sheet, as shown below.



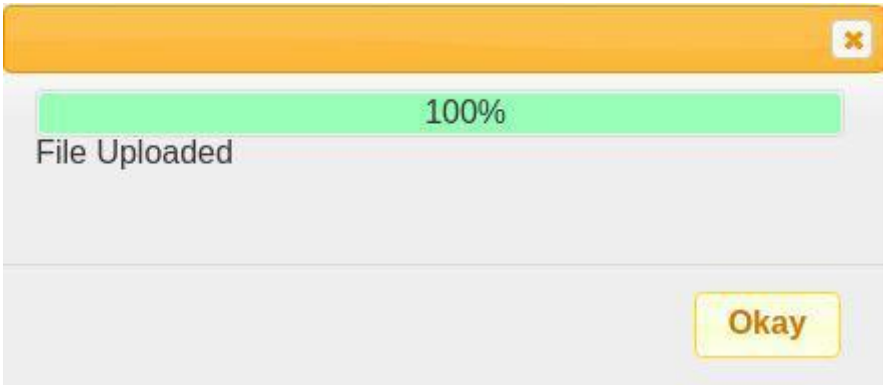
B. Go to "File> Save as" and save it in a .CSV UTF-8 Format, as shown below.



4. Click the "Choose file" button, Choose File , and select the saved file as described above in a .CSV UTF-8 format.

Note: It is possible to track the data and observe whether it has been completed or not. Furthermore, another list can be loaded to the same campaign. It must be kept in mind that there should not be duplicate telephone numbers in the second list. If so, this case will come back as overlapping. To avoid this, check the "Check phone number uniqueness" and select "Cancel Only Duplicates."

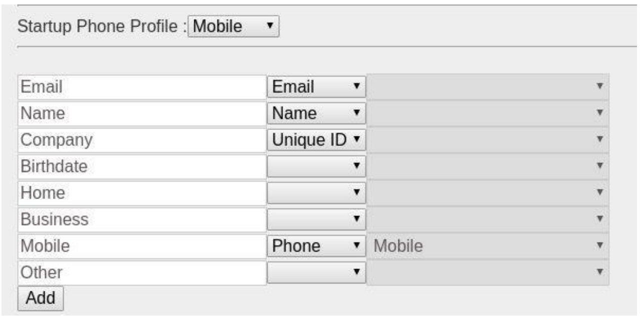
5. Click the upload button. The following pop-up window will appear:

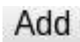


6. Click the Okay button. The following selection will appear in the pop-up window:

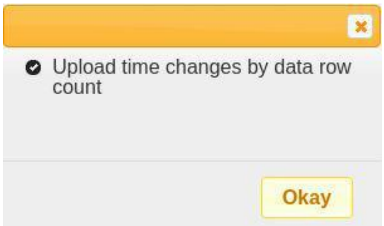
7. Click the "Startup Phone Profile," select the desired start-up phone profile for the campaign (Which phone profile will be called first).

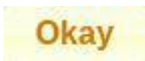
8. Match the uploaded date on the left side of the screen with the dropdown list selections (Note: See the "Adding Custom Field Name" section for creating more dropdown selections):



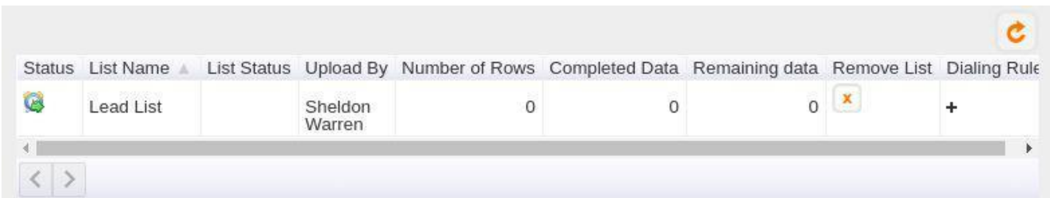
9. Click the Add button, 

, the following pop-up window will appear:



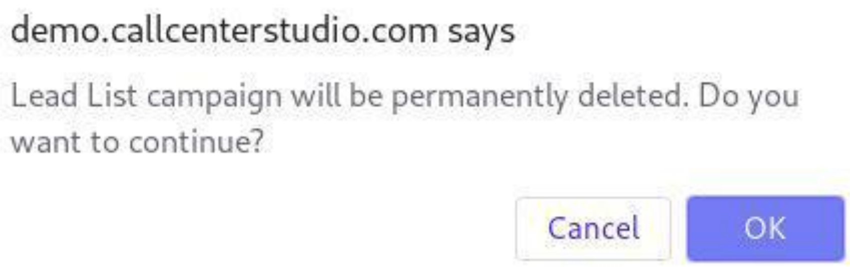
10. Click the Okay button, 

, the newly uploaded list will be displayed as shown below:



Note: To delete a list, click the delete button, , to the right of the desired lead list located in the Remove List column.

1. When the delete button is clicked the following pop-up will appear:



- *Select the cancel button, Cancel, to cancel the deletion.*
- *Select the OK button, OK, to confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK.

The screen will reload, and the deleted list will not be shown.

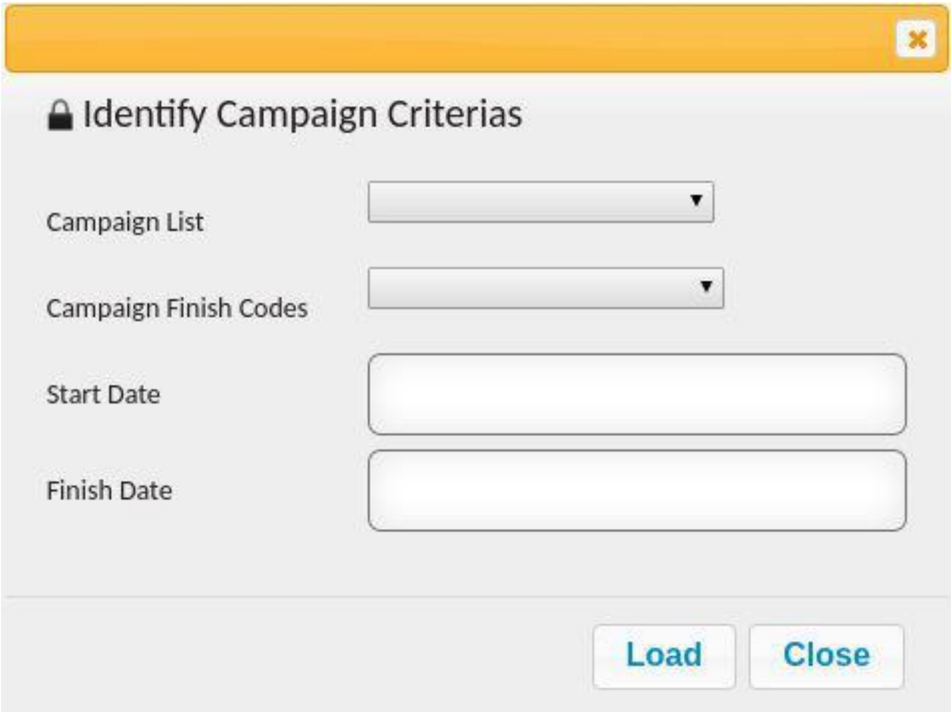
Additional Note: Each lead list within a campaign can have separate dialing rules. If desired, click the Plus button, , located to the right of the desired lead list in the Dialing Rule column. (See the Dialing Rules Tab section, to set dialing rules).

Recycling a Campaign Contact List

After a campaign is finished, the campaign list can be reused according to the finish code assigned to each contact. This feature is used to avoid re-adding lists into the campaign.

1. Click on the recycle button,  located to the right of the desired campaign name.

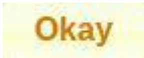
   The following pop-up window will appear:



2. Click the “Campaign List” dropdown menu, choose the desired contact list in the campaign.
3. Click the “Campaign Finish Codes” dropdown menu, choose the desired finish code to reuse.
4. Click the “Start Date” input box, choose the desired start date to filter the finish code.
5. Click the “Finish Date” input box, choose the desired finish date to filter the finish code.

6. Click the Load button, 

. The following pop-up window will appear:

7. Click the Okay button, 

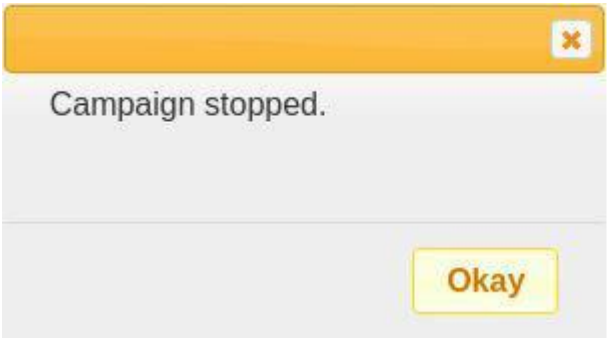
. The new list will appear under the campaign uploaded lists section.

Starting a Campaign

1. Click the start button,  located to the right of the desired campaign name (Start / Stop Campaign Column).

Stopping a Campaign

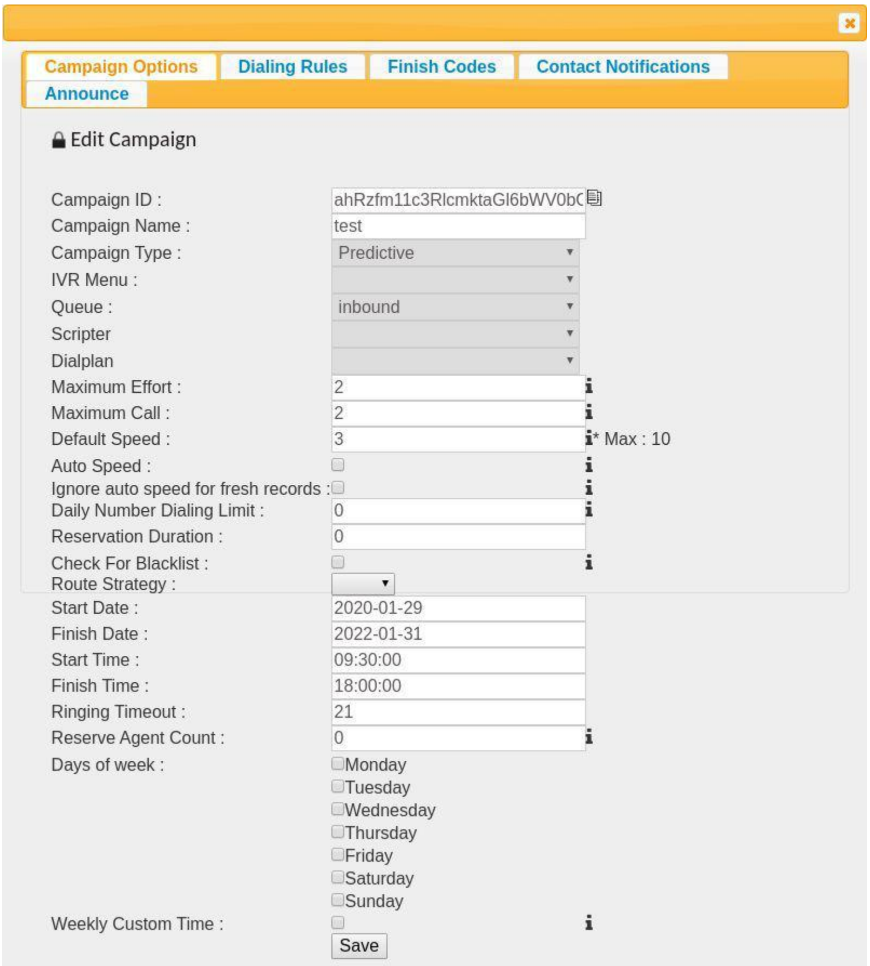
1. When the campaign is running, click the stop button,  . The following pop-up window will appear:



2. Click the Okay button,  .

Editing a Campaign

Click the edit button,  , located to the far right of the campaign name the following screen will appear:



Campaign Options Tab

1. Click the "Campaign Name" input box, type the desired campaign name. An example is shown below:

2. Click the "Campaign Type" dropdown box the following selections will appear:

Predictive	A campaign that uses the scripter and agents answer outbound calls performed dialer assigned to the campaign. For progressive dialers, predictive should be selected, and the default speed should be 1.
IVR	A campaign that makes calls answered by the IVR.

3. Select "Predictive" or "IVR" whichever is desired.
4. Click the "Queues" dropdown menu, select the desired queue (Note: only used for the predictive campaign).

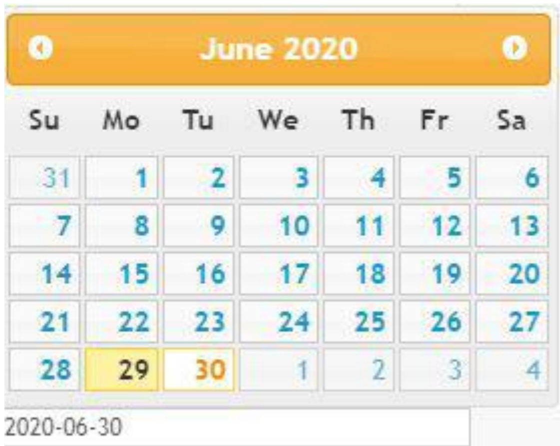
5. Click the “Scripter” dropdown menu, select the desired scripter. (Used as agent’s script when performing the campaign).
6. Click the “Dialplan” dropdown box, select the desired dialplan.
7. Click the “Contact Rate” input box. The contact rate is set up by default for a 1 to 1 delivery ratio. However, it can be customized if desired.
8. Click the “Maximum Effort” input box type the desired amount of redials for reached contacts.
9. Click the “Maximum Attempts” input box, type the desired amount of redials for the campaign contacts.
10. Click the “Speed (it is necessary for IVR Campaign)” input box. This value is multiplied by available agent count in the campaign queue. Max value is 5 for Predictive, and 10 for IVR. For small scale operations, the default value is recommended. Type the desired value.

    The “auto speed” checkbox can be selected, which is based on the amount of previously available agents.

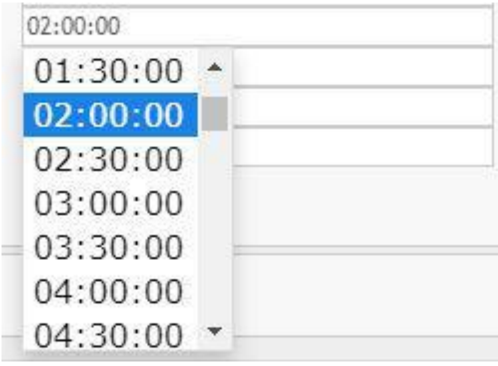
    The "Ignore auto speed for fresh records” checkbox can be selected, which ignores the auto speed for newly added contacts.
11. Click the “Daily Number Dialing Limit” input box, type the daily number dialing limit.
12. Click the “Reservation Duration” input box, type the reservation duration (seconds).
13. Check the “Check for Blacklist” checkbox if desired (checks the numbers to see if it is blacklisted before making the call).

14. Click the “Maximum schedule days” input box, which signifies the campaign’s intended number of days. Type the desired number of days.
15. Click the “Start Date” input box, which indicates the start date of the campaign. Click on the rectangular bar beside the start date column, and a calendar will popup. Choose the preferred dates on the calendar, as shown below:

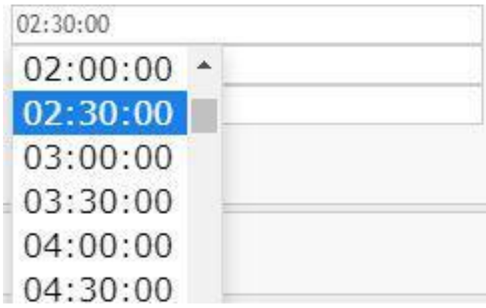
16. Click the “Finish Date” input box, which indicates the end date of the campaign. Click on the rectangular bar beside the finish date column, and a calendar will popup. Choose the preferred dates on the calendar, as shown below:



17. Click the "Start Time" input box, which signifies the campaign's preferred time to start. The time is set, as shown below:

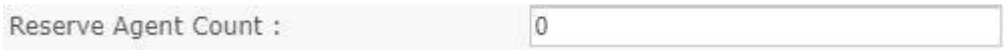


18. Click the "Finish Time" input box, which indicates the predetermined time to end a campaign. The time is set, as shown below:



19. Click the "Ringing Timeout" input box which is set as shown below (ringing timeout is in seconds and can be adjusted):

20. Click the “Reserve Agent Count” input box, which is set as shown below (The number of reserve agents on the campaign, for example, there are 20 available agents, if the reserve agent count is 5, 15 agents will receive dialer calls based on the campaign.



21. Under agent count the days of the week are shown, check the desired days for the campaign to run, or check “Custom Time” and the following selections will appear:

22. Complete the custom time chart if desired. (Note: the custom time plan is not affected by previous dates and times inputted above).

23. Click the save button, 

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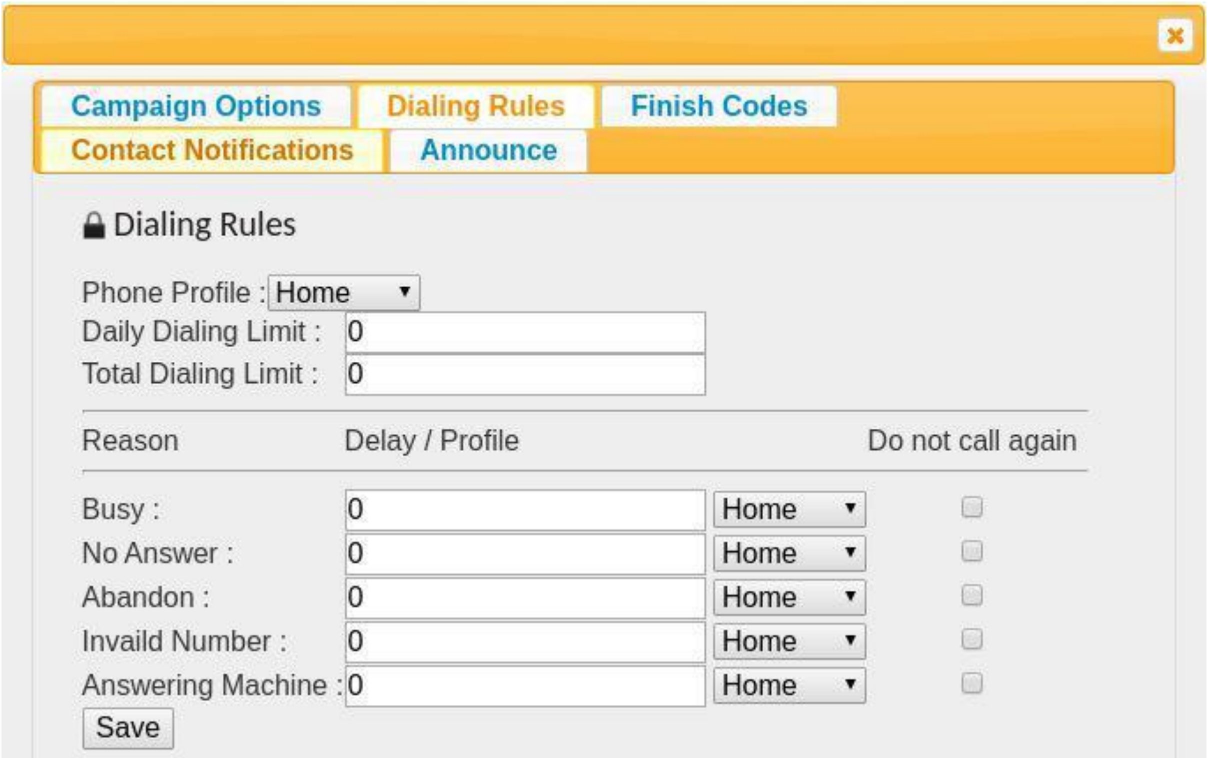
Dialing Rules Tab

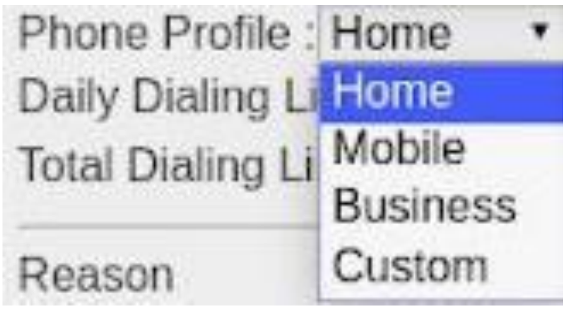
Dialing rules are created to set specific dialing rules based on the number profile.

Click the Dialing Rules tab, 

. The following screen will appear:



1. Select the desired Phone Profile as shown below (Note: this can be done for each phone profile):



2. In the “Daily Dialing limit,” input box type the desired daily redialing limit for each contact.

3. Click the "Total Dialing limit" input box. Type the desired campaign total redialing limit for each contact.

The following delays are based in minutes (steps 4-8). For example, if a busy tone is reached, and if "4" is inputted in the busy tone input box. Then, there will be a 4-minute delay before the next call is made. (Note: the "Do not call again" checkbox can be selected based on what occurred during the call).

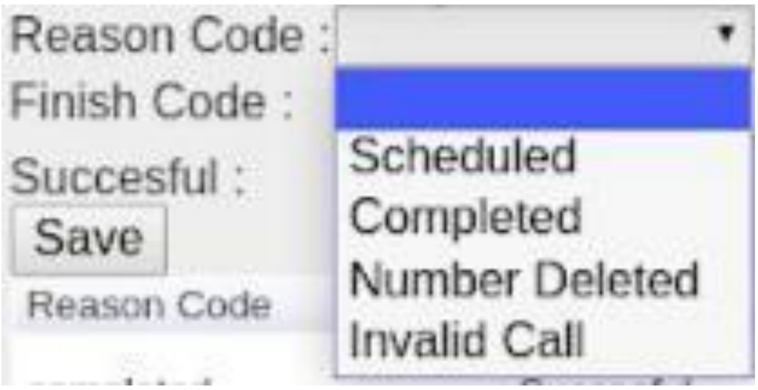
4. Click the "Busy" input box, type the delay time in minutes until the next call will be dialed.
5. Click the "No Answer" input box, type the delay time in minutes until the next call will be dialed.
6. Click the "Abandon" input box, type the delay time in minutes until the next call will be dialed.
7. Click the "Invalid Number" input box, type the delay time in minutes until the next call will be dialed.
8. Click the "Answering Machine" input box, type the delay time in minutes until the next call will be dialed.
9. Click the save button, Save .

Finish Codes Tab

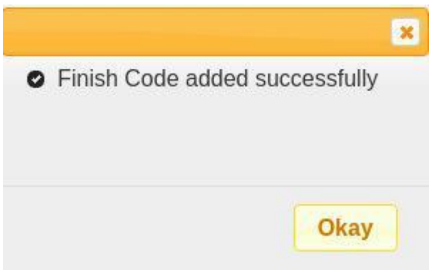
Finish codes can be created to organize the campaign and to organize the contacts based on what occurred during the call.

Click the Finish Codes tab, Finish Codes . The following screen will appear:

1. Click the "Reason Code" dropdown box. The following dropdown menu will appear:



2. Select the desired reason code.
3. Click the "Finish Code" input box, type the desired finish code.
4. If the Finish Code is created for a successful contact, select the "Successful" checkbox.
5. Click the save button, Save , the following screen will appear:



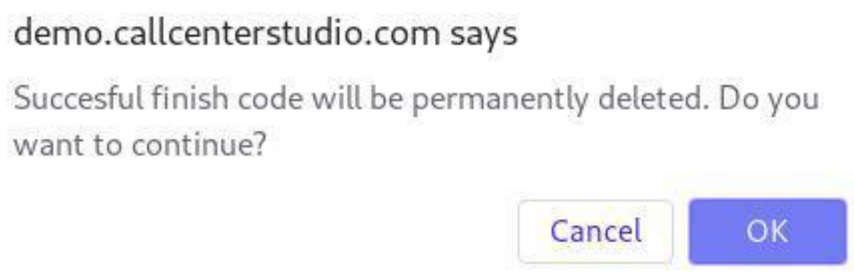
6. Click the okay button, Okay , the newly created Finish Code will be added to the Finish Code list.

Editing a Finish Code

1. Click the edit button, , located to the far right of the finish code name.
2. Make the necessary changes.
3. Click the save button, Save .

Deleting a Finish Code

1. From the Finish Code name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- *Select the cancel button,* Cancel *, to cancel the deletion.*
- *Select the OK button,* OK *, to confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK .

The screen will reload, and the deleted finish code will not be shown.

Contact Notifications Tab

Contacts notifications can be added to a CRM via a webhook using this tab.

1. If desired, check the “Contact Webhook Enabled” checkbox.
2. Click the “Contact Webhook URL” and input the URL.
3. If desired, check the “Call Result Webhook Enabled” checkbox.
4. Click the “Call Result Webhook URL,” and input the URL.
5. After the desired additions have been made, click the save button, Save .

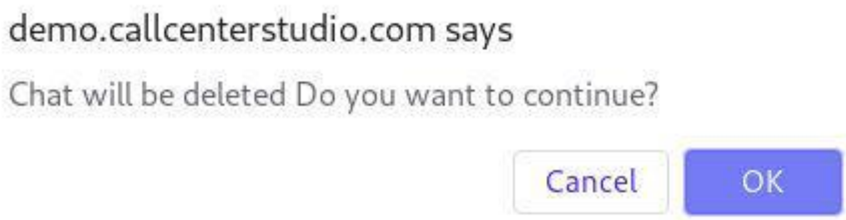
Announce Tab

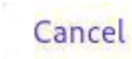
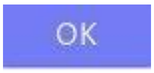
Announcements used during the campaign can be added here.

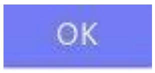
1. Click the “Announcement” dropdown box, select the desired announcement (Note: additional announcements can be added in the announcements section).
2. Click the “Announcement Repeat Period (Second)” type the desired time duration in seconds.
3. If desired, the “Instantly Play Once When Call Answered” checkbox can be checked to play the announcement once the call is answered.
4. After the desired additions have been made, click the save button, Save .

Deleting a Campaign

1. From the Campaign list, click the delete button,  , to the right of the edit button,  . When the delete button is clicked the following pop-up will appear:



- *Select the cancel button,*  *, to cancel the deletion.*
- *Select the OK button,*  *, to confirm the deletion.*

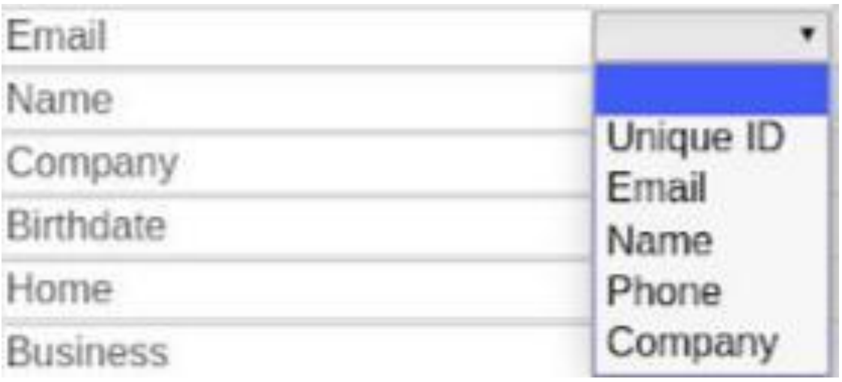
2. Confirm the deletion by clicking the OK button,  .

The screen will reload, and the deleted campaign will not be shown.

Adding Custom Field Name

When uploading a contact list for a campaign, Unique ID, Email, Name, and Phone are the default input field for the selection as shown below:

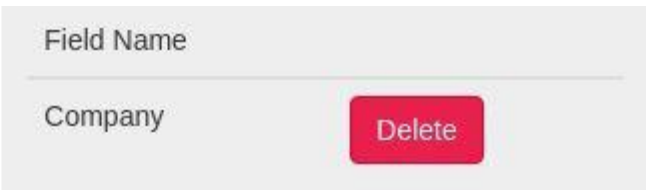
If desired, additional fields can be created to match additional information uploaded in the Call Center Studio system. For Example, Company is an uploaded field from the created .CSV file. Once, a custom field is created the dropdown selection will also have Company listed so that they can be matched as shown below:



1. From the Campaign list, click the custom field button, , to the right of the delete button, . When the delete button is clicked the following pop-up will appear:

2. Click the “Custom field name” input box, type the desired custom field name.

3. Click the Add button, . A created example is shown below:



Note: To delete the custom field name, click the “Delete” button, , located to the right of the desired custom field name.

4. After adding custom fields, click the Close button, , to return to the campaign name list.

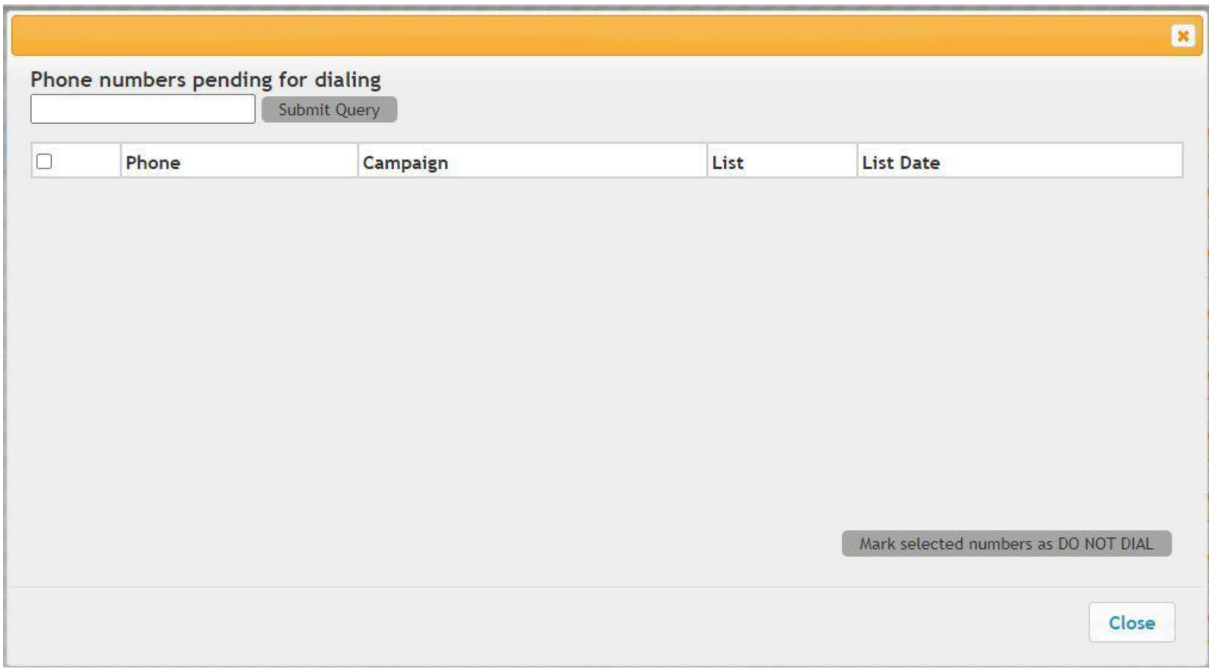
Refreshing Campaign Section

1. To refresh the campaign section, click on the refresh button located on the top right corner of the screen.

Data Management by Phone Number

Used to determine if numbers are in multiple campaigns, and can also be used to place numbers on the do not call list.

1. Click on the data management icon located in the top right corner of the screen. The image below will appear:

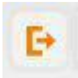


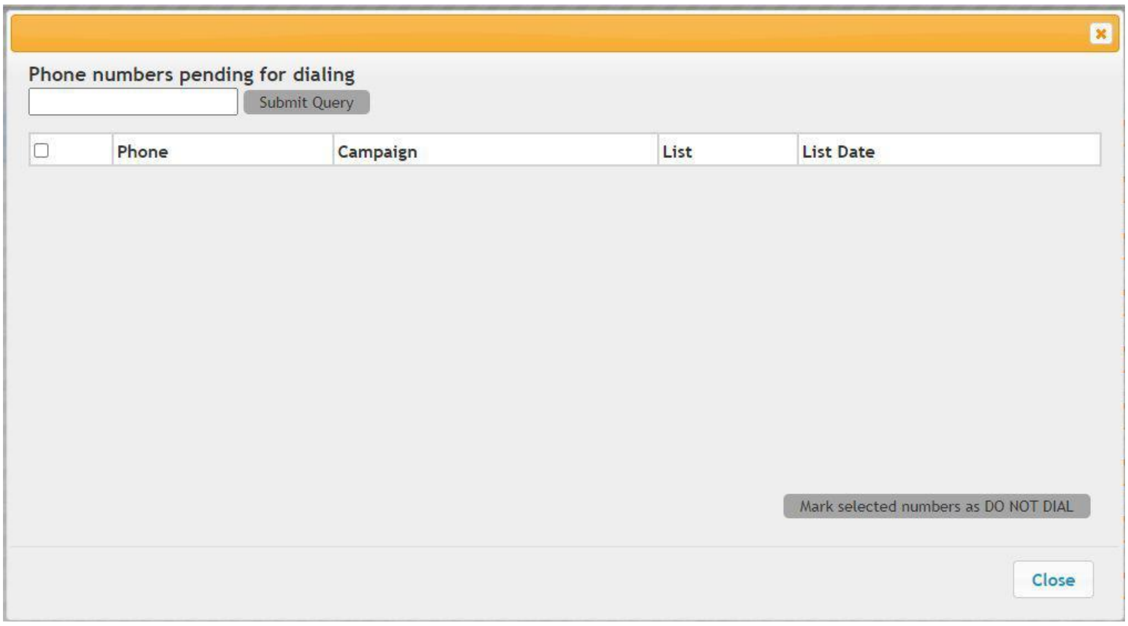
2. Submit a query by inputting the phone number in the submit query bar.
3. Click on the submit query button.

4. Click on the close button,  , to finish data management.

Data Management by Unique ID

Used to determine if numbers are in multiple campaigns, and can also be used to place numbers on the do not call list.

1. Click on the data management icon  located on the top right corner of the screen. The image below will appear:



2. Submit a query by inputting the unique ID (can be found in the reporting section after downloading the desired campaign .CSV file, a column will be labeled unique ID, each call is assigned a unique ID) in the submit query bar.
3. Click on the submit query button.
4. Click on the close button  below to finish data management.

Searching for a Campaign

1. Click the "Campaign" input box, type the campaign's name the input box is shown below:

Note: Partial names can be used, when spelled correctly.