

Technical Note: Creating a Campaign

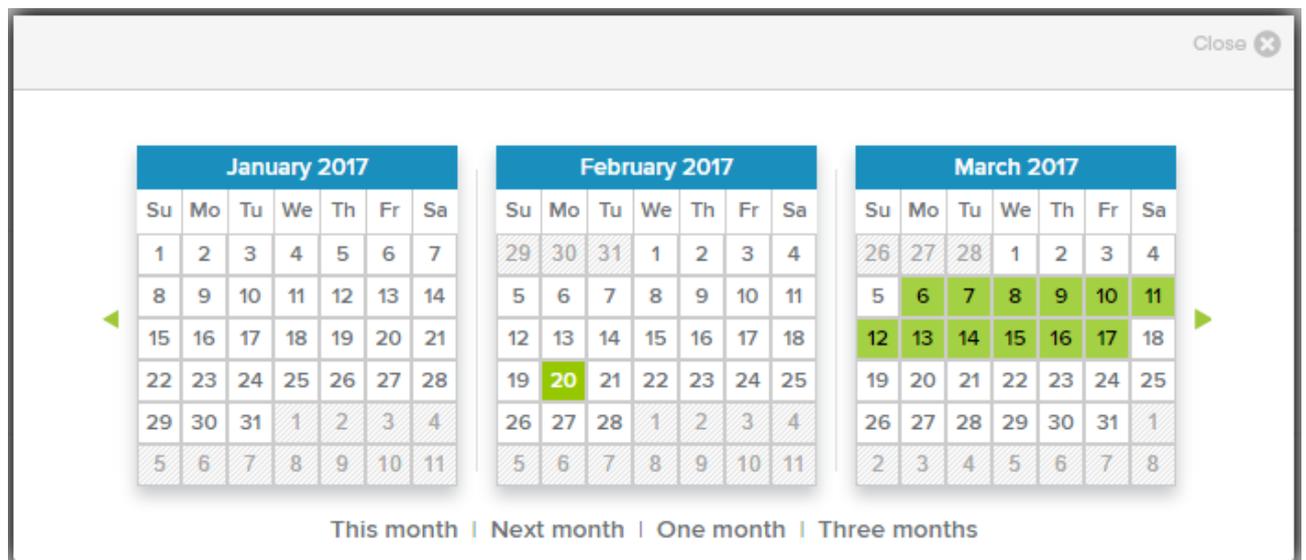
Creating a campaign in CallN allows you to track the progress of the campaign throughout the length of the campaign, and review the success of the campaign once it has completed.

To create a campaign in CallN, log in to your CallN Portal and select Campaign. This will display any previous or existing campaigns, as well as a button to Add Campaign. Select the Add Campaign button to create a new campaign.



Give your campaign a Name. Something meaningful so all who view the portal will know what Campaign this is.

Select the begin date and end date of the campaign. This sets up the active time period for when CallN will monitor the activity.



The Campaign period will be reflected as shown below.

Period campaign is active



Mon, 6 Mar 2017 - Fri, 17 Mar 2017

To enter the prospects, you will need to create a simple CSV file that is uploaded to CallN. The file consists of two mandatory fields, Name and PhoneNumber, and the optional field, GroupName. GroupName allows you to assign the responsibility of calling a prospect to an individual or a group. The GroupName is displayed when viewing the status of a campaign.

```

OneFortheAgesProspects.csv - Notepad
File Edit Format View Help
Name,PhoneNumber,GroupName
Bruce Wayne,0404111222,Justice League
Carol Danvers,0414223334,Avengers
Matt Murdoch,0401212989,Avengers
Hal Jordan,0419509835,Justice League
Gwen Stacey,0402186352,Avengers
Selina Kyle,0432097852,Justice League
Peter Parker,0402574867,Avengers
    
```

Once the file is created, press the Upload CSV button under prospects. Browse to the CSV file and with the file selected, press open. The prospects will be imported to the campaign.

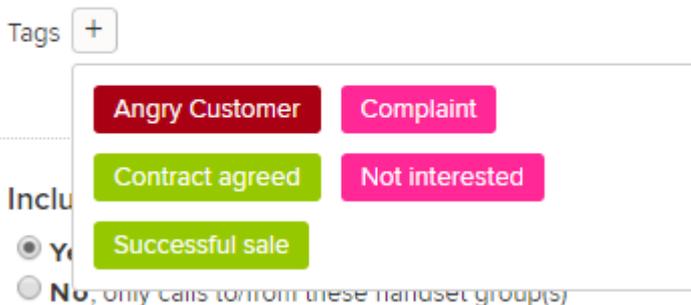
Prospects

There are 7 attached prospects



End Tags allow CallN to know when a prospect has been contacted and no more attempts will be made to contact the prospect. They end the campaign for that prospect. Any number of tags can be added to the list. Custom tags can be created but how this is done is not discussed here. To see what tags are available, select the '+' beside Tags.

End Tags



Select the tags you want to use as end tags from the list.

End Tags



We need to set what calls we monitor as part of the campaign. Do we include all calls containing a prospects phone number or do we only include calls that contain the a prospects number and specific handset group agents. If you wish to monitor all calls, set the field "include all calls in the campaign?" to

yes. If you only want to include the calls from specific handset groups, set the filter to no, then click the "Add a handset group" option.

Include all calls in this campaign?

- Yes** - include all calls
- No**, only calls to/from these handset group(s)
[Add a handset group](#)

This will allow you to choose one of your pre-configured handset group from a drop down list. If you wish to add another handset group, simply select "Add a handset group" again and repeat the selection process.

Once you have determined which calls are being monitored, you need to give your group name a label. If you chose not to include the optional field GroupName in the imported CSV file, then this step can be ignored. If you are using the optional field, you need to name the field. The field name will show when viewing the status of a campaign and the GroupName entries will be displayed in this field.

Customise Group Name Label

Press Apply to create the campaign.

Dashboard	Calls	Handsets	Reports	Activity	Campaigns	Archives
CAMPAIGNS						
Name	Start Date	End Date				
One for the Ages	Mon 6 March, 2017	Fri 17 March, 2017				
Widget Promotion	Thu 10 September, 2015	Wed 30 September, 2015				