

Technical Note: Managing a Campaign

Once a Campaign is active in CallN, you can monitor its progress by opening the campaign with in your CallN portal. To do this, click on Campaigns at the top of the portal and select the campaign you want to monitor. Clicking on the Campaign opens the campaign in a general view where the settings can be seen. All settings can be altered from the General screen. If you want to add prospects to the campaign, you will need to create a new CSV file containing both the new prospects and the existing prospects. Importing the new file will overwrite the existing prospect listing. Press Apply to save any changes made.

Dashboard Calls Handsets Reports Activity Campaigns Archives

EDIT ONE FOR THE AGES

GENERAL

STATUS

PERSISTENCE

Name

Period campaign is active
 Mon, 6 Mar 2017 - Fri, 17 Mar 2017

Prospects
There are 7 attached prospects
[Upload csv](#)

End Tags
Tags Not interested × Successful sale ×

Include all calls in this campaign?
 Yes - include all calls
 No, only calls to/from these handset group(s)

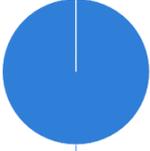
Customise Group Name Label

[Apply](#) or [Cancel](#)

By selecting Status on the left of the portal, you will be able to see the current status or the final status of a campaign if the campaign has ended. The screen shows a summary of the campaign at the top of the page and details in the lower sections of the page. Details contains a list of prospect names and phone numbers as imported from the CSV file, as well as the number of attempts made to contact a prospect and the outcome of a successful call.

Summary

Total Prospects: 7
 Attempts: 0
 Complete: 0
 Progress: 0%



Incomplete: 100.0 %

Select Agent

Details

Agent	Name	Phone Number	Attempts	Outcome	Completed Time	Completed By
Avengers	Carol Danvers	0414223334	0			
Avengers	Gwen Stacey	0402186352	0			
Avengers	Matt Murdoch	0401212989	0			
Avengers	Peter Parker	0402574867	0			
Justice League	Bruce Wayne	0404111222	0			
Justice League	Hal Jordan	0419509835	0			
Justice League	Selina Kyle	0432097852	0			

[Export](#)

If your CSV included the optional field GroupName, you can further refine the information displayed to a individual or group based on contents of the CSV file. A field "Select Agent" is set to "All" by default, but selecting one of the options from the drop down list filters all information displayed to be for that individual or group selected.

NOTE: The field name will change. It is based on what you called your "Customised Group Name Label" during the creation of the campaign. For example, if your "Customised Group Name Label" field was called "Car", the field would be "Select Car".

Select Agent



The information shown can be exported by pressing the Export button at the base of the page. This exports the file to a spread sheet compatible format.

Selecting Persistence from the left of the page will display two graphical representations of how successful agents have been contacting the prospects. A new campaign will only show one graph, with the second appearing once data is available to create the graph.

