

CallN Campaign

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.

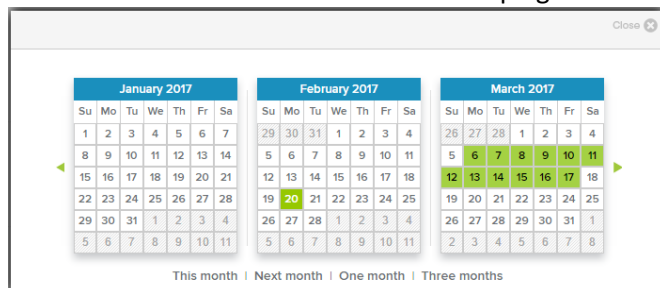
How to create a campaign

To create a campaign in CallN, log in to your CallN Portal.

- Select **Campaign** menu.
This will display any previous or existing campaigns, as well as a button to Add Campaign.
- Select **Add Campaign** button to create a new campaign.

Name	Start Date	End Date
Outbounds sales	Thu 14 March, 2019	Wed 20 March, 2019
Q1 sales campaign	Wed 1 July, 2020	Wed 30 September, 2020
Q1 sles	Tue 23 June, 2020	Mon 29 June, 2020
RACV NPS	Sun 7 July, 2019	Sat 13 July, 2019
Re-sign	Tue 29 October, 2019	Mon 4 November, 2019

- Give the campaign a Name, Something meaningful to all the users.
- Select Start and end date for the campaign



The Campaign period will be reflected as shown below.

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

- Enter prospects for the campaign. Create .csv file with following information:

What is the csv format?

Please ensure that the following columns headers are present.

Name
The prospect name

Company - [optional]
The company name

Phone, PhoneNumber or Phone Number
The prospect phone number

{Custom field}
Optional. The first "other column" could be a responsible person or department

Tech Note: Create a Campaign

- Upload .csv file to the portal. .csv file example in below image.

```

OneForTheAgesProspects.csv - Notepad
File Edit Format View Help
Name,PhoneNumber,GroupName
Bruce Wayne,██████████,Justice League
Carol Danvers,██████████,Avengers
Matt Murdoch,██████████,Avengers
Hal Jordan,██████████,Justice League
Gwen Stacey,██████████,Avengers
Selina Kyle,██████████,Justice League
Peter Parker,██████████,Avengers
  
```

- The GroupName is displayed when viewing the status of a campaign.
- Press 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

[Upload csv](#)

- Adding End Tags allow CallIN to know when a prospect has been met for that call and no more attempts will be made to contact that call prospect. They end the campaign for that prospect. A multiple 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

Tags

Includ

Yes

No, only calls to/from these handset group(s)

- Select the tags to be used from the list.

End Tags

Tags

- **Limit to handsets.**

If No, then it will for all handsets and groups. To set the limits tick yes.

- Select a handset group or an individual handset.

Limit to handsets?

- No
- Yes, only calls to/from these handsets or groups

Add a handset group

Add a handset

- Choose from the list of pre-configured groups and handsets.
- Add to limit call list.
- Click **Apply** to save the changes.

Optional: Customise Group Name Label:

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

Agent

Press Apply to create the campaign.