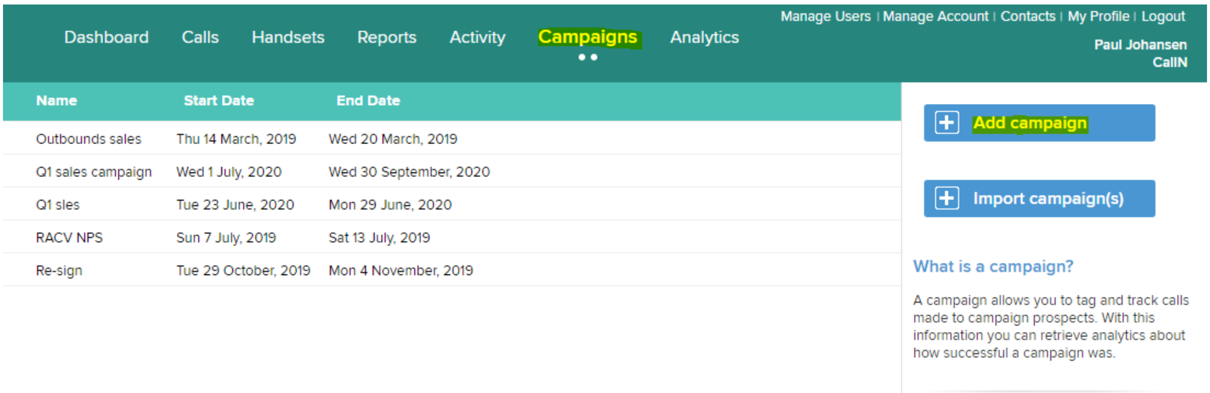
CallN Campaign

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.

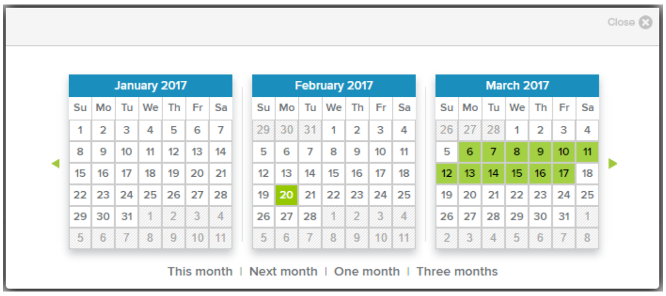
How to create a campaign

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

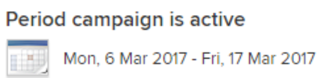
- Select **Campaign** menu.
  This will display any previous or existing campaigns, as well as a button to Add Campaign.
- Select **Add Campaign** button to create a new campaign.



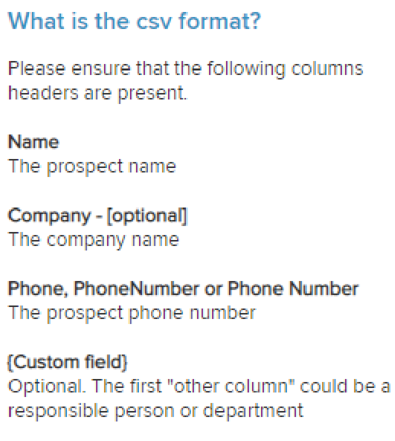
- Give the campaign a Name, Something meaningful to all the users.
- Select Start and end date for the campaign



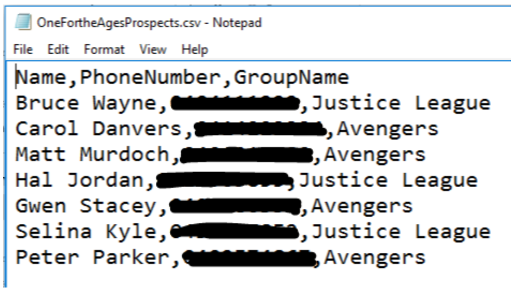
The Campaign period will be reflected as shown below.



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



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



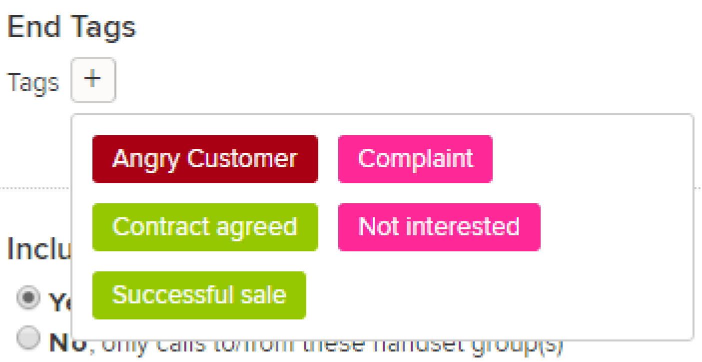
OneFortheAgesProspects.csv - Notepad

File Edit Format View Help

```
Name,PhoneNumber,GroupName
Bruce Wayne,[redacted],Justice League
Carol Danvers,[redacted],Avengers
Matt Murdoch,[redacted],Avengers
Hal Jordan,[redacted],Justice League
Gwen Stacey,[redacted],Avengers
Selina Kyle,[redacted],Justice League
Peter Parker,[redacted],Avengers
```

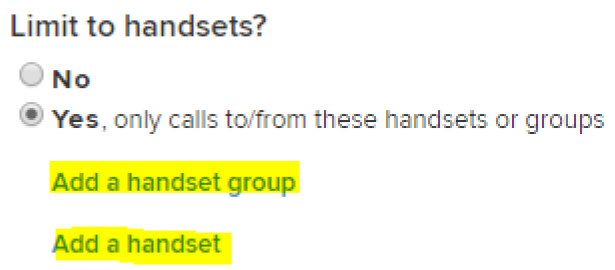
- The GroupName is displayed when viewing the status of a campaign.
- Press Upload CSV button under prospects. Browse to the CSV file and with the file selected, press open. The prospects will be imported to the campaign.

- Adding End Tags allow CallN 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.



- Select the tags to be used from the list.

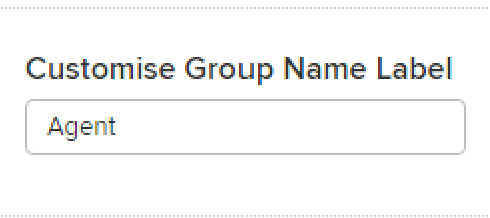
- **Limit to handsets.**
  If No, then it will for all handsets and groups. To set the limits tick yes.
    - Select a handset group or an individual handset.



- 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.



Press Apply to create the campaign.