ice

Campaign Administrator

User Manual

Server Version 12

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Welcome to iceCampaign

As email and web-based communications become more common in today's business world, many call centers are evolving into **contact centers.** Contact centers interact with clients over the telephone, through email messages, and over the Internet.

ice is a powerful contact center solution that allows for the integrated handling of **contacts** (calls, email messages, chat requests, etc.) that are directed to your contact center. **iceCampaign** is an add-on module for ice that enables contact centers to execute outbound calling campaigns using predictive, progressive, and preview dialing. It also provides the capability to run outbound IVR (interactive voice response) campaigns.

The *iceCampaign User Manual* will help you to understand and manage iceCampaign Administrator and iceCampaign User. A chapter is dedicated to each of the following topics:

- iceCampaign Overview – explains preview dialing, progressive dialing, predictive dialing, inbound campaigns, outbound IVR, and the major components of iceCampaign Administrator and iceCampaign User.
- iceCampaign Administrator – explains how to use iceCampaign Administrator to create and modify a campaign, customize fields in iceCampaign User, import prospects into a campaign, and delete campaigns.

<u>This manual assumes that you:</u>

- Are familiar with the contents of the *iceAdministrator User Manual*;
- Understand how to use iceBar and have access to the *iceBar User Manual*;
- Understand basic telephony terms and concepts, such as queue and contact;
- Have basic navigational skills for standard Windows®-based graphical user interfaces. This includes the ability to right-click and left-click, select options from a right-click menu, resize and minimize windows and navigate and scroll with a mouse pointer.

The following conventions are used in this manual:

- **Notes** highlight important information.
- **Cautions** are used to bring attention to functions and features that can affect the information viewed.
- Words displayed in **bold font** are defined within the paragraph.
- *Italics* are used to indicate buttons found on the software interface.
- The term "right-click" is used to indicate that the secondary mouse button, which by default is the button on the right, should be clicked. This configuration can be changed so that the left mouse button is the secondary button (for personal preference, for example, if the user is left-handed.)

Chapter 1: iceCampaign Overview

A **campaign** is an organized strategy for contacting multiple **prospects** to fulfill an objective, such as making a sale or delivering a key message. Prospects are the people that you wish to contact as part of the campaign. Prospects might be existing clients, or they might represent a new market for your company.

The sections that follow describe the iceCampaign software components and how to create, manage and execute campaigns.

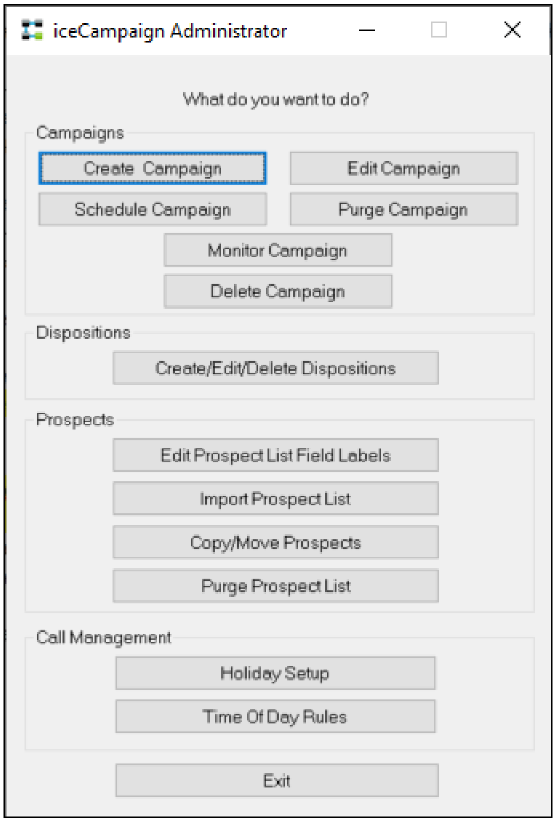
Once familiar with the basic concepts of iceCampaign, you may refer directly to Chapter 2: iceCampaign Administrator for detailed information on creating and modifying campaigns. Chapter 3 provides details on executing campaigns using iceCampaign User.

Components of iceCampaign

The iceCampaign solution is comprised of two applications – iceCampaign Administrator and iceCampaign User – which are described in the sections that follow.

iceCampaign Administrator

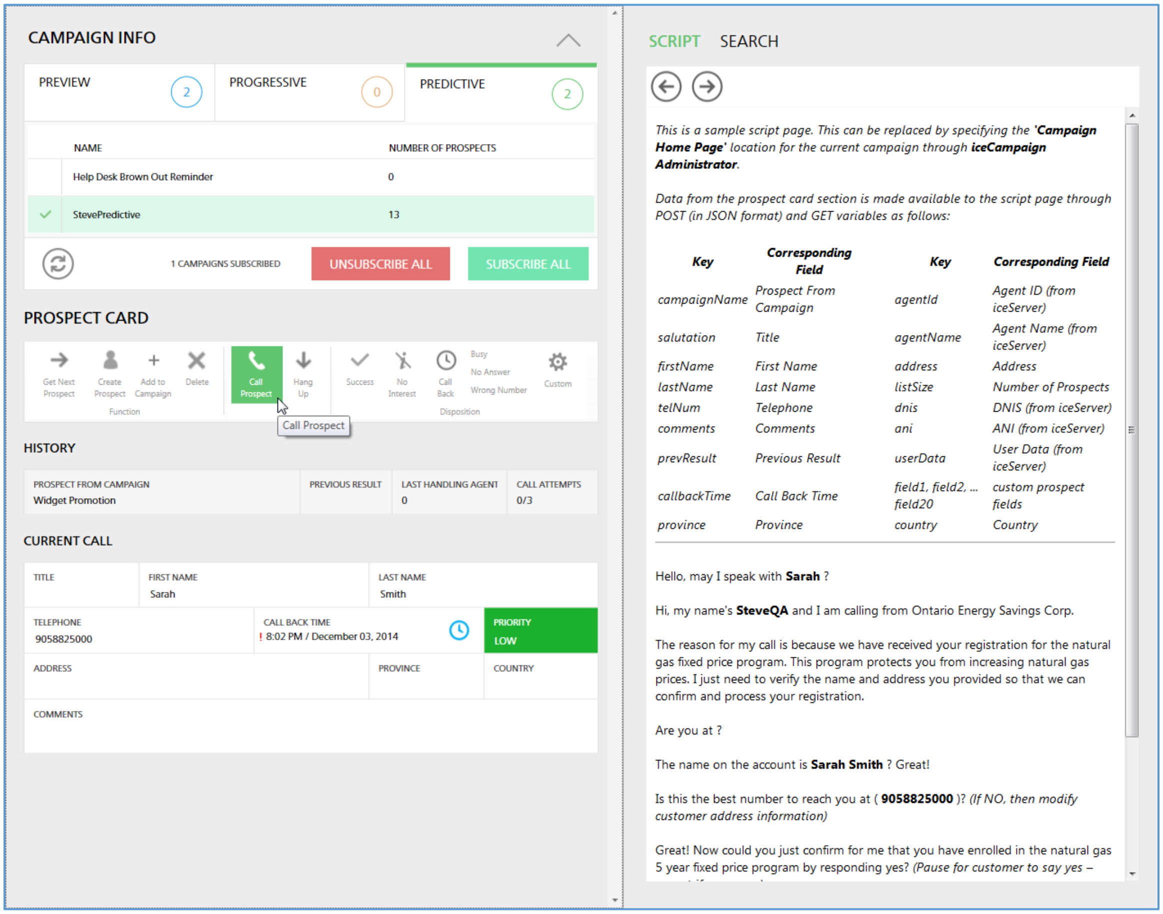
iceCampaign Administrator allows a user to create, modify, and delete campaigns. Typically this component of iceCampaign, shown below, is installed on the **ice administrator's** workstation. The ice administrator is the person in your office who is responsible for designing and maintaining ice.



For more information on using iceCampaign Administrator, refer to Chapter 2: iceCampaign Administrator.

iceCampaign User

iceCampaign User is a browser-based application that allows a user to access prospects that are part of existing campaigns, as shown below. This component of iceCampaign is accessible to users through the iceBar software.



For more information on iceCampaign User, refer to the *iceBar User Manual*.

Dialing Modes

Preview Dialing

Preview dialing allows the user to retrieve the next prospect in a campaign, view details about the prospect, and then initiate a call to the prospect. Unlike a manual campaign, users using preview dialing do not have to key in a telephone number. This ensures that calls are dialed accurately each time. Calls are not automatically placed when Preview dialing is used.

A user performs preview dialing simply by pressing *Get Next* to the application window. The next prospect's contact information is displayed on the user's screen. From here the user can preview the information and decide whether or not to call this prospect. Pressing the 'call' button automatically places a call to the prospect. If they reach a live person, they proceed with their interactive script that is displayed on their screen. At the conclusion of the call, the user updates iceCampaign with the prospect's final 'disposition' or outcome.

For information on how a user can log-on to a Preview campaign, refer to the *iceBar User Manual.*

Progressive Dialing

Progressive dialing is dependent on whose state in iceBar is "Ready" and who has subscribed to one or more campaigns. A call is placed to the prospect waiting the longest with the highest priority in the iceCampaign waiting list (across the campaigns that the user has subscribed to).

When a call is placed on the user's behalf, the user may hear ring back and will be able to speak with the prospect when the call is answered. Or, depending on configuration, the user may be able to speak immediately to the prospect.

Prospect information is automatically displayed in the iceCampaign application window and the script frame will launch any customized scripts defined for the prospect's campaign type.

Users will automatically have their iceBar status set to 'Not Ready' as soon as the call is placed by iceCampaign.

The user decides the next action based on the outcome of this call. If a live party answers the call, the user proceeds with their "interactive script". At the conclusion of the call, the user updates the campaign database with the prospect's final disposition using the appropriate iceCampaign client disposition button.

Users will need to make themselves 'Ready' in iceBar in order to receive an inbound call or start the timer for the next progressive-dialed call. Once the call is completed, the users can perform post-call wrap-up tasks during the configured wrap up time.

For more information on how a user can log-on to a Progressive campaign, refer to the *iceBar User Manual.*

As an alternative to presenting automatically dialed prospects to users, you may also choose to play a message to a prospect, as described in the section that follows.

Predictive Dialing

Predictive Dialing screens out no-answers, busy signals, answering machines, and disconnected numbers while predicting when a user will be available to handle the next call.

When the system detects a live answer, it registers the call in a queue for the next user. The pacing algorithm works to provide the highest probability that a user is ready to speak to the live prospect. An iceCampaign screen pop-up occurs when a user answers the call.

As an alternative to presenting automatically dialed prospects to users, you may also choose to play a message to a prospect, or combine playing a message with providing the option for the prospect to speak to a user during business hours. “Play Message” is described in the section that follows.

<u>The Pacing Algorithm</u>

The pacing algorithm is a customizable workflow application that analyzes real-time statistics and dialing trends to determine the number of simultaneous calls to attempt.

The ideal pacing algorithm ensures that a user becomes available just as a customer/prospect answers the call.

Many more calls are placed than users available, to compensate for all the call attempts that result in busy, no answer, out of service, etc.

<u>The following criteria are taken into account for an optimal pacing algorithm:</u>

- Queue grade of service (number of live respondents handled within target ASA/number of live respondents queued)
- Estimated wait time
- Average connect time
    - The average amount of time required for the dialer to get a live answer
    - The default is 20 seconds
- Number of users logged on and available to handle calls (i.e. in the Ready state)
- Number of lines available
- Number of calls queued
- Number of call attempts in progress
- Percentage of overruns (pace exceeds user availability rate)
- Percentage of connects (i.e. Call Connection Rate)

The section below describes how the pacing algorithm is developed.

1. Line availability check. If none available, do not proceed.
2. Determine to connect rate.
    a. If in calibration mode, use **Startup Connect Rate**.
3. Determine predicted number of agents that are currently on call who will become available based on average connect time (***@G_iAvgConnectTimeInSecs***) and average handling time (***@G_iAvgHandlingTimeInSecs***).
    a. If the current call for the agent is predicted to end (based on ***@G_iAvgHandlingTimeInSecs***) before the next prospect is connected (based on ***@G_iAvgConnectTimeInSecs***), increment count.
4. Max dial rate check.

5. GOS check (only in non-calibration mode). Adjust numbers obtained from steps 2 and 3 if necessary.

GOS is obtained from queue stats. If the current GOS is lower than the target GOS (i.e. there are more abandoned calls than expected), the connect rate is slowed down by a factor controlled in workflow by the variable ***@G_iGOSWeightingSlowDownFactor*** (default value of 10). If the current GOS is higher than the target GOS, the connect rate is sped up by a factor controlled in workflow by the variable ***@iGOSWeightingSpeedUpFactor*** (default value of 0).

Adjustment Rate = (current GOS – target GOS) * factor
Adjusted connect rate = connect rate – adjustment rate
Adjusted predicted number of ready agents = original predicted number of ready agents * (1 + adjustment rate)

1. Calculate the number of expected connected calls if we go ahead and call this next prospect, based on the (adjusted) connect rate, the number of calls in progress and the number of prospects already in the queue.

Expected connected calls = connect rate * (calls in progress + 1) + queue size

2. If the number of expected connected calls is less than or equal to the number of currently available agents plus the predicted number of agents who will be ready, then proceed with getting and calling the next prospect.

During calibration, the admin user can adjust the connect rate higher if they find that there are a lot of abandoned/disconnected calls. This means that they underestimated the connect rate. If they find the opposite (i.e. there are a lot of idle agents), then they overestimated the connect rate and should be adjusted lower. Once the process is no longer in calibration mode, it will use the call stats to adjust the connect rate automatically to either speed up or slow down the pace until it achieves the target GOS as long as it stays below the max dial rate.

While not in calibration mode, the admin user can change the Startup Call Attempts value higher to force it back to calibration mode.

Note that any changes to the campaign setting values through the iceCampaign Administrator user interface will be picked up by the pacer after one minute.

Note: The pacing algorithm can be tweaked in iceWorkflow Designer. It is highly recommended that you contact ComputerTalk prior to modifying the pacing algorithms in the workflow.

Workflow for iceCampaign

Predictive Dialing and Outbound IVR Campaign

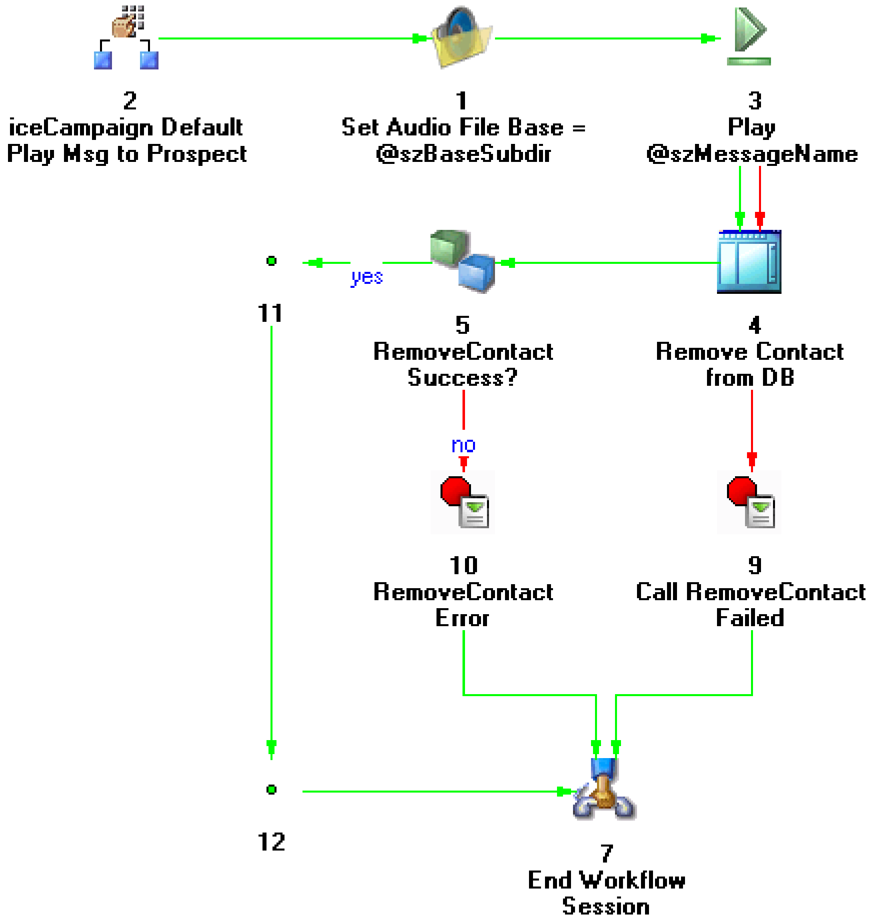
In Predictive campaigns, the prospect is directed to the workflow DN specified in the 'Route DN' field when creating the campaign. Each campaign can specify one workflow DN. For more information on creating a campaign, refer to page14.

<u>Customized workflow or workflow templates can be used to handle calls in a Predictive or Outbound IVR campaign:</u>

- Use workflow that has been customized for your contact center – to create a customized workflow, create a new workflow page, build the workflow application on that page, and add an Assign DN action to the workflow. The Assign DN action allows you to specify a four-digit DN that can be dialed to access the workflow. Subsequently, campaigns can be configured to use this new workflow. For more information on creating a workflow, refer to the *iceWorkflow Designer User Manual.*
- Use a workflow template –workflow templates have been created to handle calls placed to prospects in a Predictive or Outbound IVR campaign, as described in the sections that follow. Before you can configure a campaign to use a workflow template, you must import and save the template using iceManager Administrator. If iceCampaign Administrator is open while you are making these changes, you may have to close and reopen iceCampaign Administrator before you can select the workflow DN from the 'Route DN' drop-down list. For more information on importing to iceAdministrator, refer to the *iceAdministrator User Manual.*
- Maximum number of concurrent calls can be set for Predictive Campaigns. This is accomplished using the global variable @g_MaxCallsInProgress.

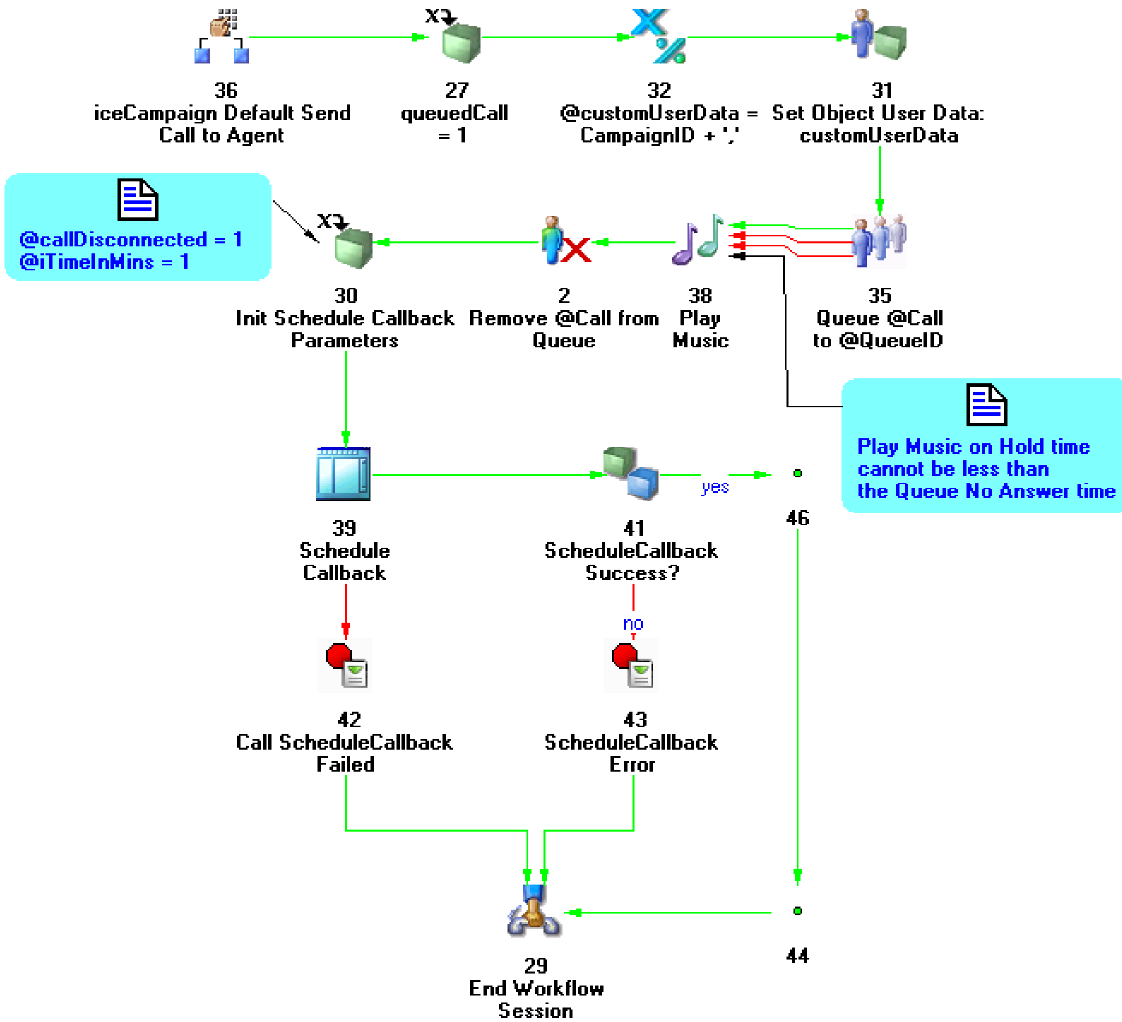
Play Message

Once a prospect is reached through a predictive or Outbound IVR campaign, you may wish that a message is played to that prospect instead of involving a live user. This is accomplished through the ‘Play Message’ workflow template. This workflow is configured to play a message and then disconnect the call, as shown below.



Send Call to User

When a prospect is reached through a predictive campaign, you may wish to have a user speak to that prospect. This is accomplished through the ‘Send Call to User’ workflow template. This workflow is used to place the successfully reached prospect into the queue associated with the campaign, as shown below.



In theory, a user should be available to handle any calls that are presented to the queue. However, it is possible that a prospect could wait in this queue for a few moments. Two features of the workflow template account for this:

- Play Music – If a user does not immediately answer the call, the Play Music action plays music to the caller. By default, this action plays music for 5 seconds, but this can be modified.
- Schedule Callback – If a user does not answer the caller while they are listening to music, then a callback is scheduled by the workflow. The number of minutes that the campaign waits to try the prospect again is determined by the variable **@iTimeInMins**. By default, this variable is set to 1 minute, but this can be modified.

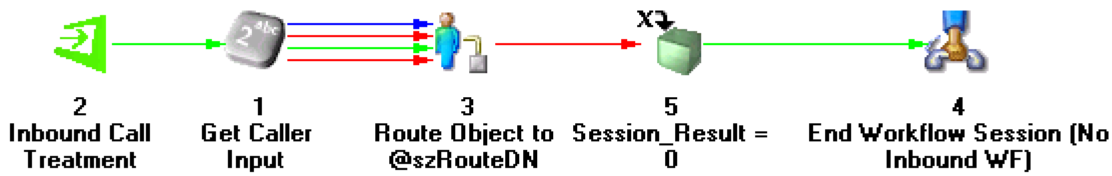
Inbound Call Treatment

A campaign can be configured to receive calls and direct them to users. For example, you mail out a promotion with an associated phone number, and when a contact calls this phone number for more information on the promotion, the DNIS is recognized by ice and the call is placed in the queue specified for this campaign. The call will then be answered by the first available user.

Configuring a Predictive campaign on ice includes creating a trunk group that is used to place outbound calls to prospects. Prospects that are successfully contacted are directed to the 'Route DN' associated with the campaign. Inbound calls might also be presented to this trunk group, and can be handled in one of the following ways:

- The terminus of the UC Group directs calls to a workflow application that is designed for inbound calls.
- The terminus of the trunk group directs calls to the 'Inbound Call Treatment' template, as shown below. This template receives inbound calls, has a silent prompt for the caller to enter a workflow DN. If the DN is not entered, the caller is disconnected. If the caller enters 8903, the iceCampaign ports are reset, which may be required in the event of lock failures. By default, this is the configuration for a Predictive campaign.

The template 'Inbound Call Treatment' is used when the contact center does not expect to receive inbound calls on the trunk group being used to make outbound calls.



For more information on how to modify actions, refer to the *iceWorkflow Designer User Manual.*

Outbound IVR

The ‘Play Message’ workflow template described on page 8 can be used if you simply require an outbound campaign that plays a message and disconnects. For example, a campaign to notify prospects that hydro service in their area is temporarily unavailable.

However, if you wish to have an outbound IVR where prospects interact with a menu, you would require a custom IVR workflow and would need to specify the DN for that workflow when you set up the campaign. Refer to the *IceWorkflow Designer User Manual* for more information on creating a workflow.

Chapter 2: iceCampaign Administrator

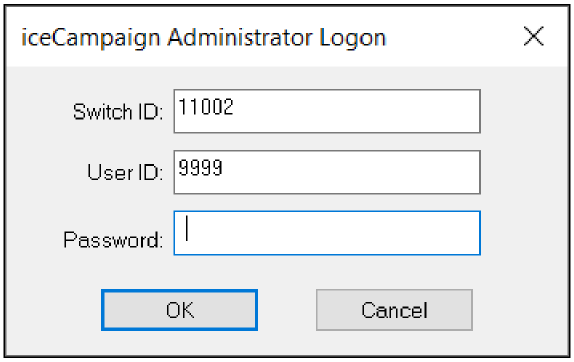
iceCampaign Administrator allows administrators to create, modify, schedule, purge and delete campaigns, as described in the sections that follow.

Launching iceCampaign Administrator

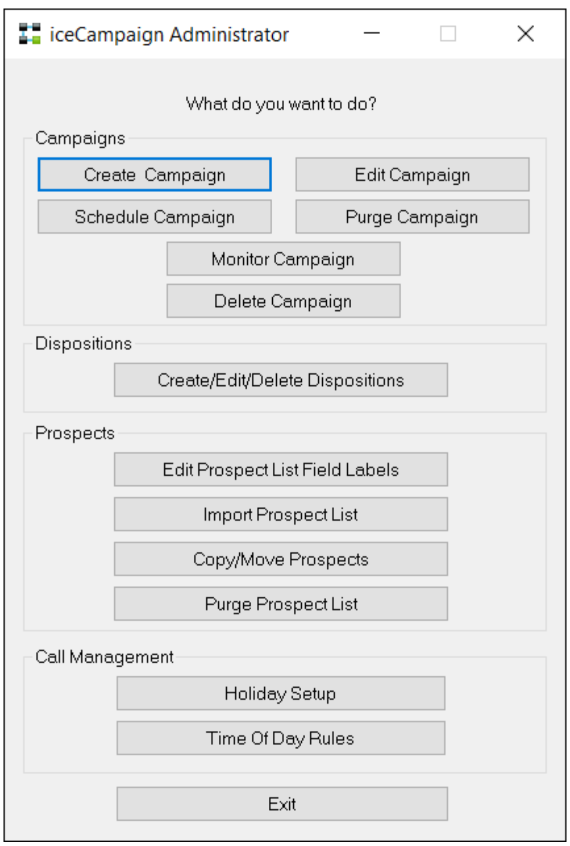
<u>To launch iceCampaign:</u>

1. Double click the iceCampaign Administrator icon in Citrix. The icon looks like this:

2. Enter your User ID and Password and click *OK*.



The ‘iceCampaign Administrator’ window appears, as shown below.



3. To close iceCampaign Administrator, click *Exit*.

Creating a Campaign

Administrators must create one or more campaigns before users can begin to make or receive calls for an outbound or inbound calling campaign.

A campaign is used to group a list of potential customers, or prospects, and to provide an HTML script for users to use when they have been connected with prospects.

Before you create a campaign, the HTML script for that campaign should be complete.

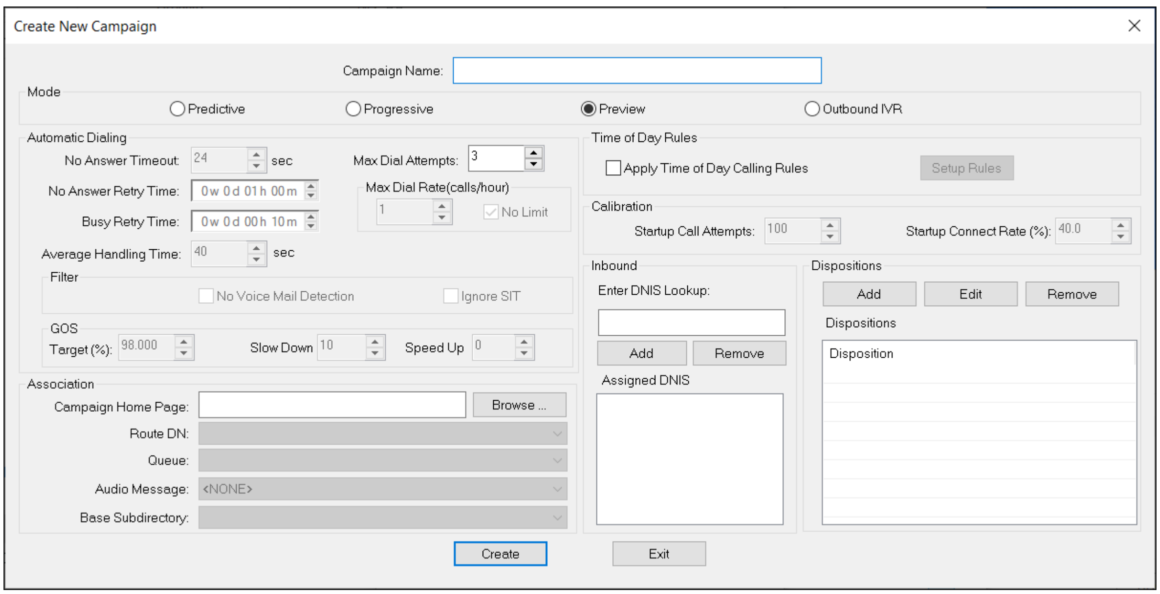
To create a campaign:

1. Launch iceCampaign Administrator.

   The iceCampaign Administrator window opens.

2. Select *Create Campaign*.

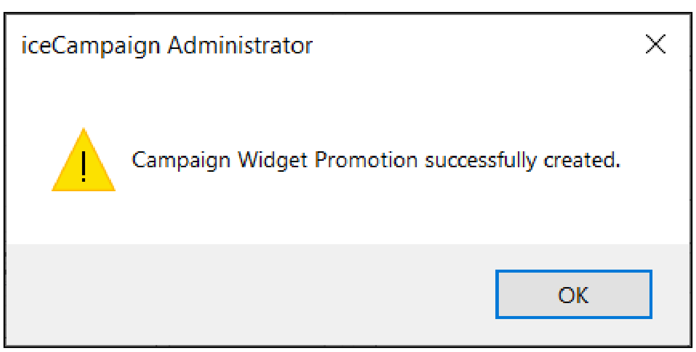
   The window 'Create New Campaign' opens, as shown below.



3. Complete the properties of the campaign, as described in the table below.

4. Click *Create* to add the new campaign to the iceCampaign database.

   A confirmation window appears, as shown below.



5. Click *OK* to close the confirmation window, and click *Exit* to close the 'Create New Campaign' window.

The table below describes the fields and buttons that can be used when creating a new campaign. The fields that are important for pacing are underlined– they can be adjusted to affect the pace of calls made.

Creating a New Campaign	
Field/Button	**Description**
Campaign Name	The name of the campaign. Enter a name that is meaningful to the users, since they can log on to a queue based on the campaign name associated with that queue.
Mode	Predictive – automatically calls a list of telephone numbers in sequence and screens out no-answers, busy signals, answering machines, and disconnected numbers while predicting when a user will be available to handle the next call.
	Progressive – automatically places a call to the next prospect in a campaign whenever a user becomes available.
	Preview – allows a user to retrieve the next prospect in a campaign, view details about the prospect, and then initiate a call to the prospect. Calls are not automatically placed when Preview Dialing is used.
	Outbound IVR – automatically places a call to the next prospect in a campaign and connects the prospect to an IVR (interactive voice response) contained within your Workflow.
Automatic Dialing **Note:** this does not apply to Preview or Progressive mode campaigns	No Answer Timeout (sec) – specify how many seconds you wish iceCampaign to ring a prospect's phone before timing out. The default is 24 seconds (4 rings).
	Max Dial Retries – specify how many times you wish iceCampaign to attempt to call each prospect's phone number. The default is 3 retries.
	No Answer Retry Time – specify the number of minutes/hours/days/weeks before a call back is scheduled when the result of a call to a prospect is "No Answer." The default is one hour.
	Busy Retry Time – specify the number of minutes/hours/days/weeks before a call back is scheduled when the outcome of a call to a prospect is "Busy." The default is ten minutes.
	Max Dial Rate (calls/hour) – specify the maximum number of attempts to dial in one hour. The default in the software is No Limit, therefore the hardware dictates the actual limit.
	Filter – choose No Voicemail Detection if you wish iceCampaign to proceed with a prospect even if the call is greeted by voicemail. Choose Ignore SIT if you wish iceCampaign to proceed with the prospect even if the call is greeted by a SIT tone (SIT is a message that is played by the phone company, alerting callers that the phone number has changed).

Creating a New Campaign	
Field/Button	**Description**
Apply Time of Day Calling Rules	Enable this so that Time of Day rules are applied to this campaign. When this checkbox is not checked off, Time of Day rules is not applied to this campaign. You can modify Time of Day Rules from several places: 1. Click the Setup Rules button from the Create New Campaign or Edit Campaign screen. 2. Click Time of Day Rules under the Call Management section from the Main iceCampaign screen.
Association	Campaign Home Page – available for all campaign modes except Outbound IVR, specify the URL to the first page that is shown in the Campaign Script frame of iceCampaign User. Each campaign can have its own URL. Usually, this is an address on your network, but it could also be an address on the World Wide Web (e.g. http://www.msn.com/).
	Browse – Click to browse your PC and/or network for the Campaign Home Page (available for all campaign modes except Outbound IVR).
	Route DN[1] – available for all campaign modes except Preview, successfully contacted callers are routed to the DN specified in this field. This field must be completed.
	Queue[1] – available for Predictive campaigns, the user logs on to this queue to handle contacts in the campaign.
	Target GOS – available for Predictive campaigns, represents the Grade of Service (GOS) that you want for the queue. The default is 98%, which indicates that you want 98% of the calls answered within the Target ASA that has been set for the queue (e.g. the Target ASA might be set to 5 seconds). The Target GOS is the target percentage of connected calls which successfully reach the agent (i.e. not abandoned/disconnected while in the queue). iceCampaign gauges the ability of the users to answer the calls that have been placed to prospects. If the GOS falls below the Target (e.g. of 98%), iceCampaign decreases the speed at which calls are placed to prospects.
	Audio Message and Base Subdirectory[1] – not available for preview or progressive modes, allows you to specify an Audio Message that is associated with the campaign. For more information on Audio Messages and the Base Subdirectory, refer to the *IceWorkflow Designer User Manual*.

Creating a New Campaign	
Field/Button	**Description**
Calibration **Note:** this is for Predictive mode campaigns only	Startup Call Attempts **–** The number selected represents the number of calls for which iceCampaign assumes the Startup Connect Rate, which is described below. The default value is 100. The pacing is in calibration mode upon startup until the value in this field has been achieved. The pacing will revert back to calibration mode when the current dial rate falls below the value in this field. When the Startup Call Attempts has been exceeded, iceCampaign begins to predict the connect rate, as described below.
	Startup Connect Rate – A predictive campaign continually predicts the **connect rate** (the percentage of calls attempts which will end up connecting successfully to the prospect). iceCampaign uses the connect rate to determine the pace at which to call prospects. When a campaign is first started, iceCampaign has no historical information to use in predicting the connect rate. Because of this, you must specify a **Startup Connect Rate**. iceCampaign assumes this is the connect rate when determining the pace at which to call prospects. The default value is 40.
Inbound	Enter DNIS Lookup – This field allows a user to specify a DNIS or several DNISs for this campaign. A DNIS is a number that the caller has dialed. This feature is used for inbound campaigns. When a call from the specified DNIS(s) arrives at the user's workstation, the appropriate campaign information is automatically presented in the iceCampaign User window. Add/Remove – click to add or remove the DNIS from the campaign.
Dispositions	Describes the result of a call or call attempt. Add/Edit/Remove – click to Add, Edit or Remove a disposition from the Campaign.

[1]Audio Message, Queues, and DNs must be defined and saved in iceAdministrator before they can be selected in iceCampaign Administrator. If newly created items are not displayed in iceCampaign Administrator, close and reopen iceCampaign Administrator to refresh the view from the ice database.

You have created the campaigns required for your call center. The next section describes how to customize some of the fields in iceCampaign Administrator.

Modifying a Campaign

Once you have created a campaign, you may need to modify or delete it. iceCampaign Administrator allows you to edit a campaign, purge prospects from a campaign, and delete a campaign. The sections that follow describe how to perform each of these tasks.

Editing a Campaign

Editing a campaign is required if you would like to change a campaign name, change the script used for the campaign, or edit any of the other fields that are available when you first create a campaign.

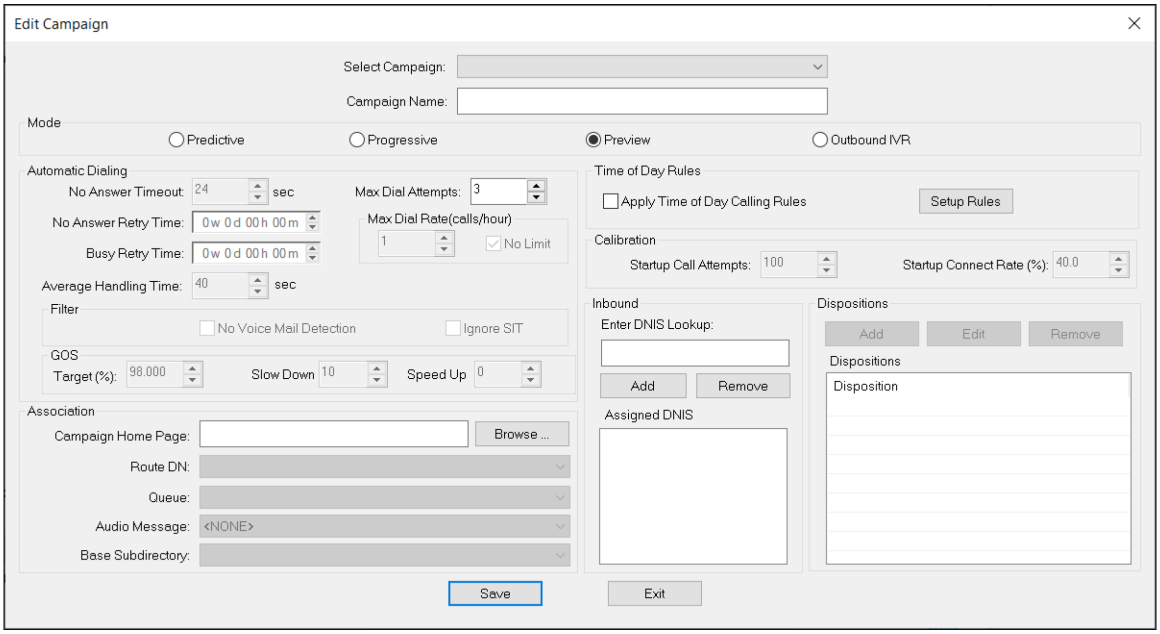
<u>To edit a campaign:</u>

1. Launch iceCampaign Administrator.

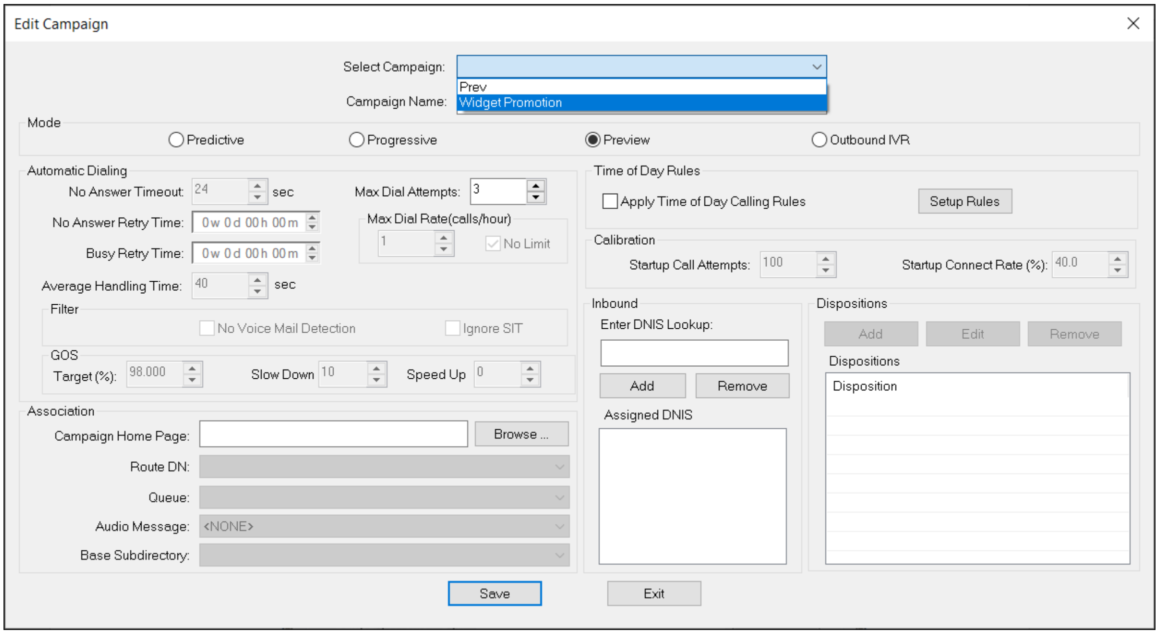
   The iceCampaign Administrator window opens.

2. Select *Edit Campaign*.

   The window Edit Campaign opens, as shown below.



3. Select the campaign that you wish to modify from the 'Select Campaign' drop-down list.

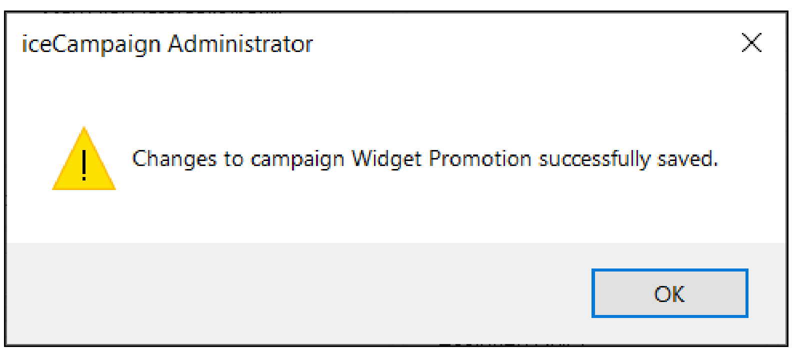


4. Modify the remaining fields as required.

   Refer to the table starting on page 15 for a complete description of the fields.

5. Click *Save* to save your changes.

   A confirmation message appears, as shown below.



6. Click *OK* to close the messages window, and click *Exit* to close the 'Edit Campaign' window.

Schedule a Campaign

Administrators can schedule a Predictive or Outbound IVR Campaign to run according to a specific schedule. Additionally, a Campaign can be Started and Stopped at any given point as long as the schedule has not expired.

Note:

1. Progressive and Preview campaigns cannot be scheduled.
2. Prior to calling prospects, ice will check all time of day settings in the following order: Campaign schedule, then Holiday rules, then Time of Day rules. For information on changing Campaign schedule, continue reading. For information on holiday rules and Time of Day rules, refer to Call Management.

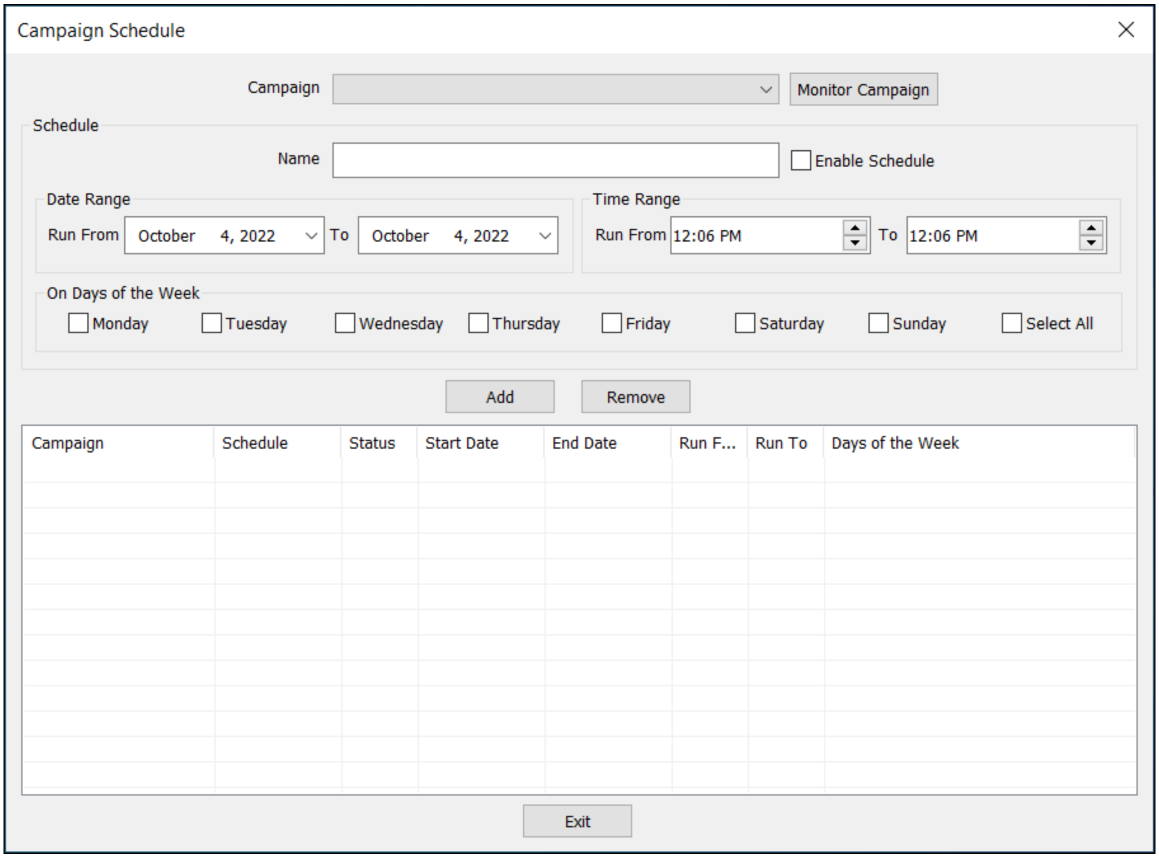
To create a schedule for a campaign:

1. Launch iceCampaign Administrator.

   The iceCampaign Administrator window opens.

2. Select *Schedule Campaign*.

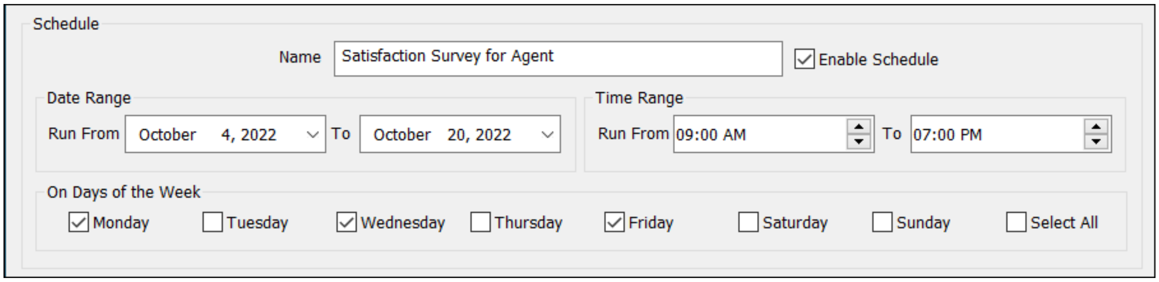
   The window Campaign Schedule opens, as shown below.



3. Select the campaign you wish to schedule from the dropdown list.

4. Enable the checkbox “Enabled” to enable the schedule.

   Note: you must enable a schedule for it to run.

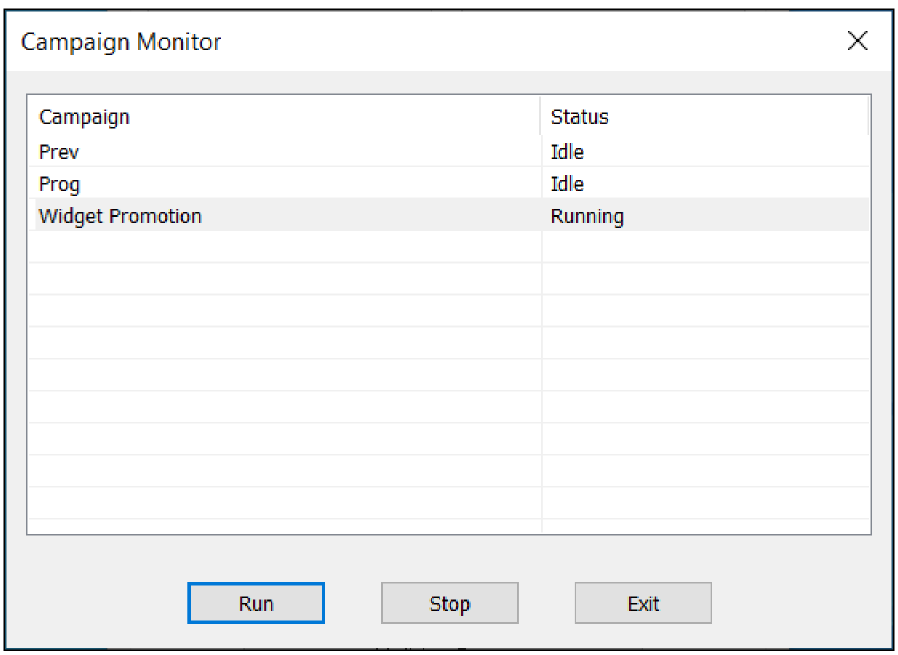


5. Choose the date range, time range, and day(s) of the week when you would like the campaign to run.
6. Click *Add* to add this schedule to the list.

   Repeat these steps to add additional schedules for the same campaign. Refer to the table that follows for a complete description of the fields.

   Note: if the specified time range runs past midnight, then the campaign will not run on the last date of the date range.

   Important: To start or stop a campaign, click Monitor Campaign from the iceCampaign Administrator Main Menu or from the Schedule Campaign window. To start the campaign, select the relevant campaign and click Run. To stop it, select the relevant campaign and click Stop. You can start and stop campaigns one at a time.



Scheduling a Campaign	
Field	**Description**
Campaign	A drop-down list showing all relevant campaigns. Select the Campaign for which you want to Add or Remove a schedule.
Monitor Campaign	Opens up the Campaign Monitor window, where you can change the status of campaigns (i.e. from Idle to Running and vice versa).
Schedule	Name – Enter a descriptive name for the schedule
	Enable Schedule – Select this checkbox if you wish to activate this campaign. Otherwise, the campaign status will remain Disabled.
	Date Range – Set the Run From (start date) and To (end date) for this Campaign to run. Click the arrow to bring up a calendar and select the desired dates by clicking on them.
	Time Range – Set the Run From (start time) and To (end time) for this Campaign to run. **Note**: If the specified range runs past midnight, then the Campaign will not run on the last date of the date range.
	On Days of the Week – Specify the day(s) of the week on which this Campaign will run, within the specified date range.
Add Remove Buttons	Add – Adds the schedule for the selected Campaign. Click the Add button to add the new schedule. Remove – Removes the schedule of the selected Campaign. Highlight the schedule from the list and click the Remove button.

Scheduling a Campaign	
Field	**Description**
List	Shows all existing Campaign schedules. Status: Schedules can be either Enabled or Disabled. Enabled schedules can be: • Expired – An expired schedule will not run, the date range has passed. • Current - A schedule that is currently running. • Active - A schedule that current (i.e. if it were enabled, it would run) but it is not enabled. • Future – A schedule with a date range that is in the future. • Disabled – A schedule that is not enabled.

Removing a Schedule

Administrators can remove a schedule for a specific campaign.

1. In the list, highlight the schedule you wish to remove.
2. Click Remove.

The schedule is removed from the list.

Starting a Schedule

Administrators can start an enabled campaign and it will run until the next scheduled Stop or the Stop button is pressed.

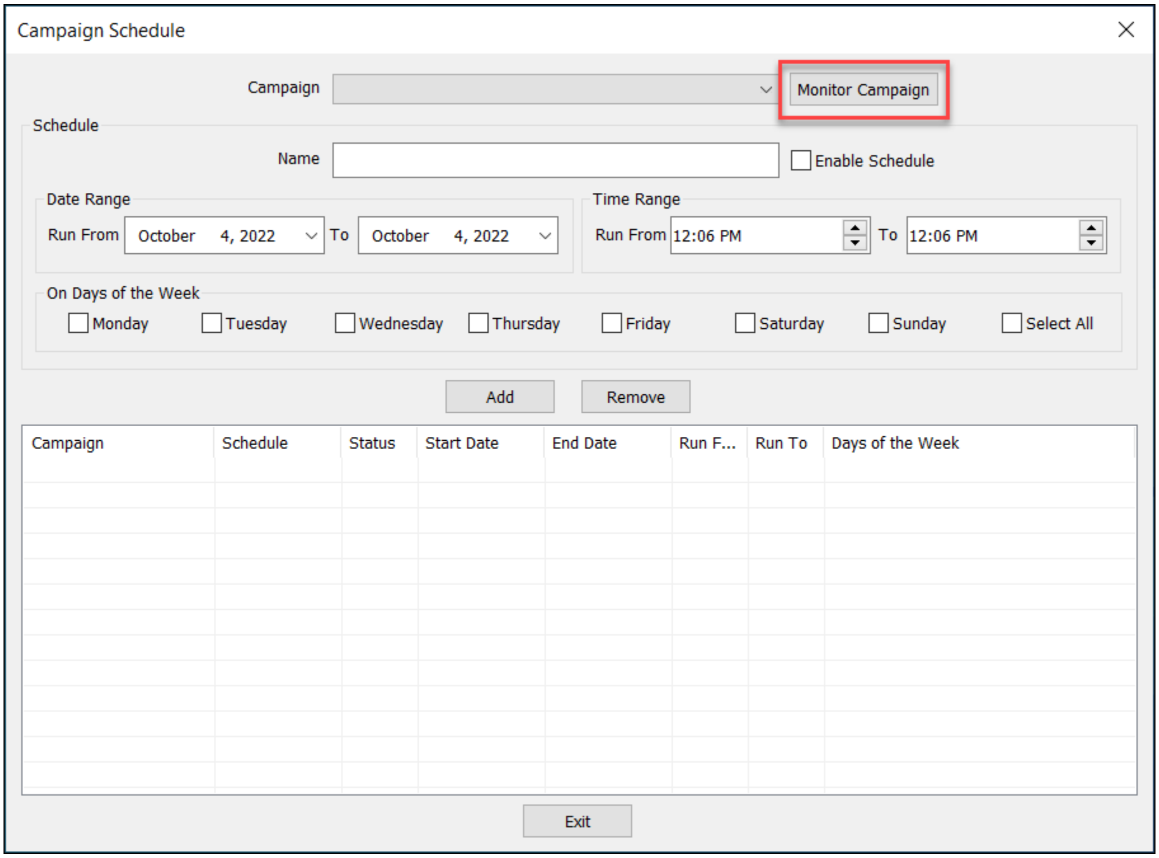
1. In the list, highlight the schedule you wish to start.
2. Click Start.

The campaign will run until the next scheduled Runtime.

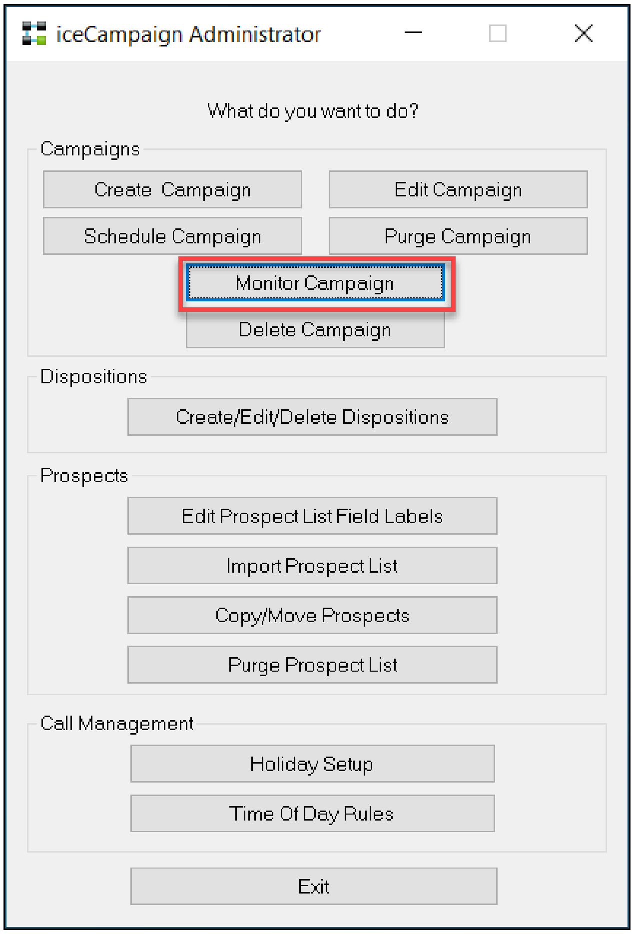
Stopping a Schedule

Administrators can stop an active campaign.

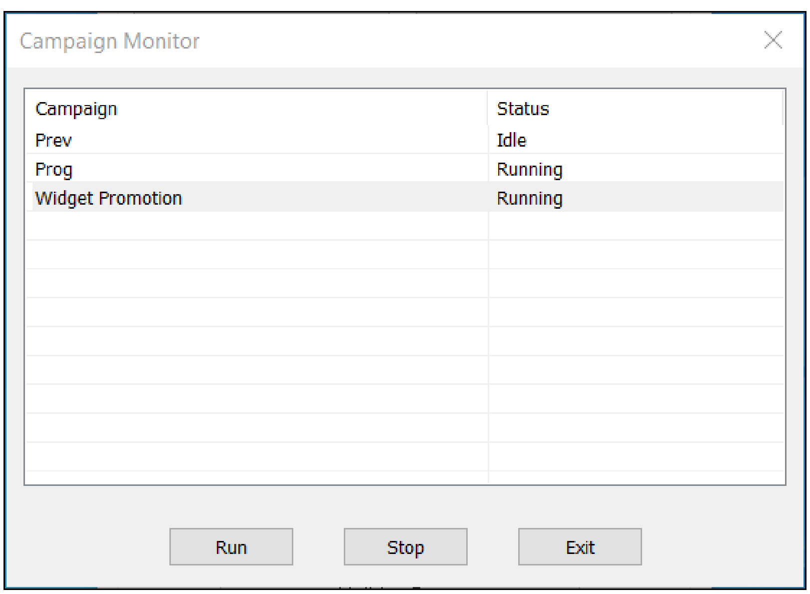
1. From the Campaign Schedule window, select 'Monitor Campaign'.


Campaign Schedule
Campaign
Monitor Campaign
Schedule
Name
Enable Schedule
Date Range
Run From
October 4, 2022
To
October 4, 2022
Time Range
Run From
12:06 PM
To
12:06 PM
On Days of the Week
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday
Select All
Add
Remove
Campaign
Schedule
Status
Start Date
End Date
Run F...
Run To
Days of the Week
Exit

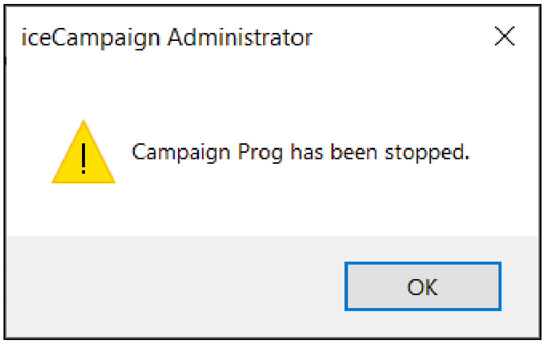
Alternatively, you can also access the Monitor Campaign window from the iceCampaign Administrator menu window.



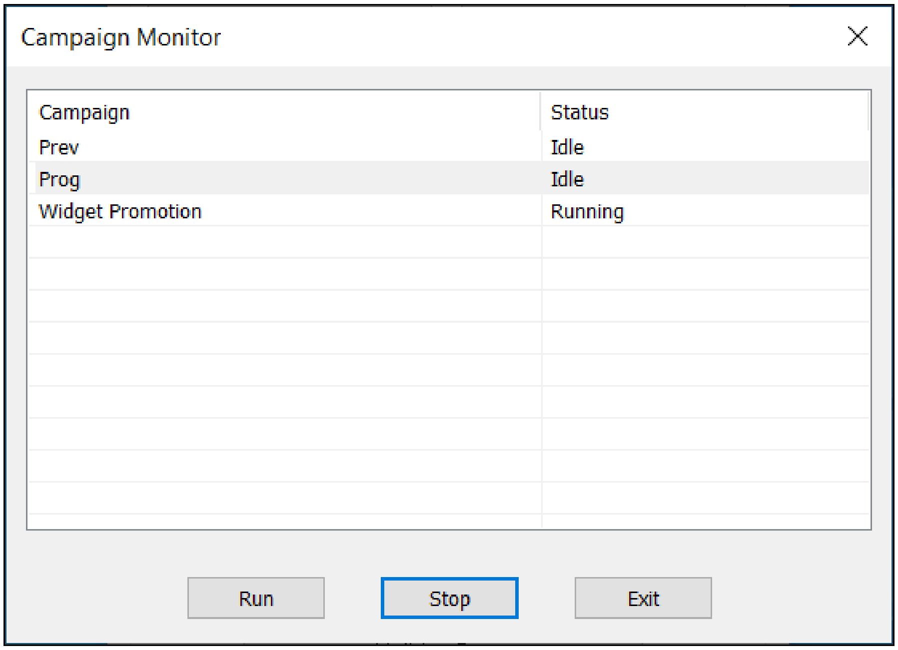
The Campaign Monitor window appears.



2. Highlight the campaign you want to stop and click Stop. A message notifying you the campaign is stopped appears.



3. The status updates to show Idle. The status of the campaign is no longer Running.



The campaign is stopped.

Purging a Campaign

Administrators can purge data from a campaign without removing the campaign itself.

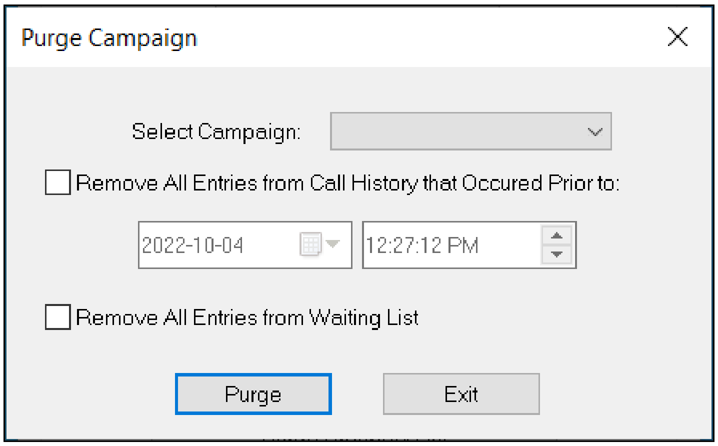
<u>To purge statistics from a campaign:</u>

1. Launch iceCampaign Administrator.

   The iceCampaign Administrator window opens.

2. Select Purge Campaign.

   The window Purge Campaign opens, as shown below.



3. Select the campaign you wish to purge from the ‘Select Campaign’ drop-down list.

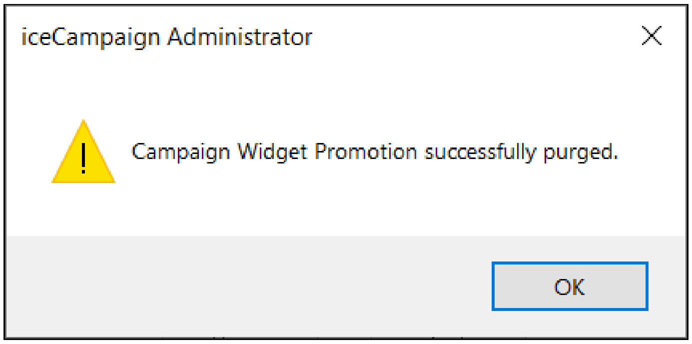
4. If you wish to remove call history for calls that were made before a certain date and time, select the checkbox beside ‘Remove All Entries from Call History that Occurred Prior to’. Select a date and time from the corresponding drop-down lists.

   Reporting data for the campaign prior to the date selected is removed from the database when you click *Purge.*

5. If you wish to remove all prospects who have yet to be contacted from the calling list, select the checkbox beside ‘Remove All Entries from Waiting List’.

   All prospects which were waiting to be contacted are removed from the campaign when you click *Purge.*

6. Click *Purge*. Once complete, you will see a confirmation message.



7. Click *OK* to close the messages window, and click *Exit* to close the 'Purge Campaign' window.

Deleting a Campaign

Administrators can delete a campaign when it is no longer required. Do not delete a campaign before a DNIS associated with that campaign has been removed from the Enter DNIS Lookup list (refer to Create a Campaign starting on page 14 for more information).

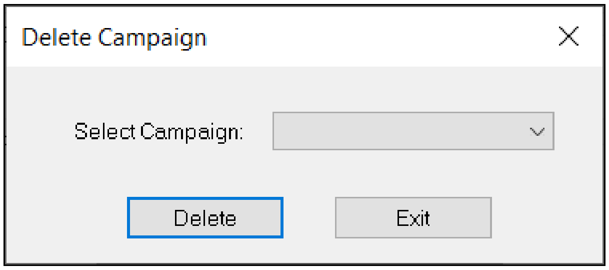
To delete a campaign:

1. Launch iceCampaign Administrator.

   The iceCampaign Administrator window opens.

2. Select Delete Campaign.

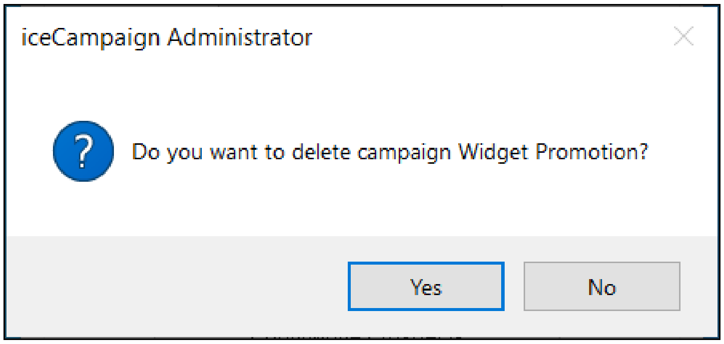
   The window Delete Campaign opens, as shown below.



3. Select the campaign that you wish to delete from the 'Select Campaign' drop-down list.

4. Click Delete to delete the campaign and all of its prospects.

   A confirmation window appears, as shown below.



5. Click *Yes* to delete the campaign, or *No* to cancel the Deletion. Click *Exit* to close the ‘Delete Campaign’ window.

Dispositions

Disposition codes are used to tag the outcome of a call to a prospect. iceCampaign comes with the following standard disposition codes:

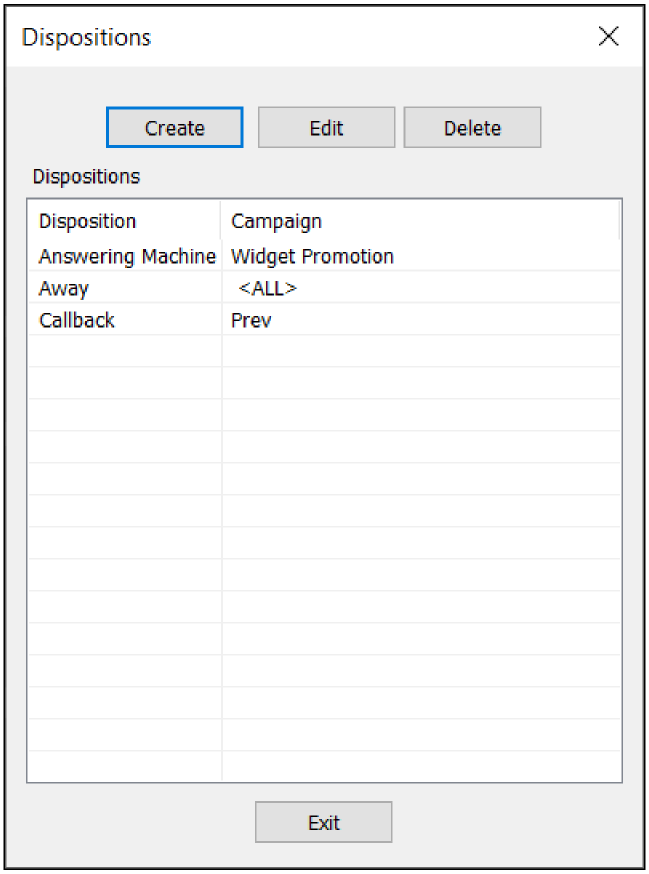
Disposition	Disposition Code
Success	1
No interest	2
Callback	3
No answer, callback	4
Busy signal, callback	5
Wrong number	6
Remove	7
Assign to the new campaign and remove from the current campaign	8
Assign to the new campaign, keep in the current campaign	9
Call disconnected	10
Dial Error	11

Administrators can also create, edit, and delete custom dispositions. They can be created for a specific campaign or apply to all Campaigns.

Creating Dispositions

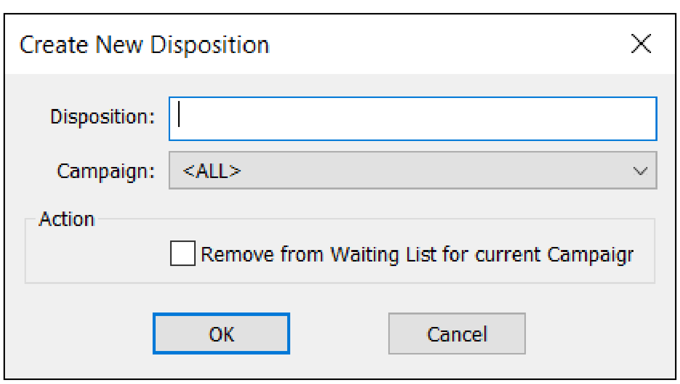
1. Launch iceCampaign Administrator.
2. The iceCampaign Administrator window opens.
3. Select Create/Edit/Delete Dispositions.

   A window opens:



4. Click *Create.*

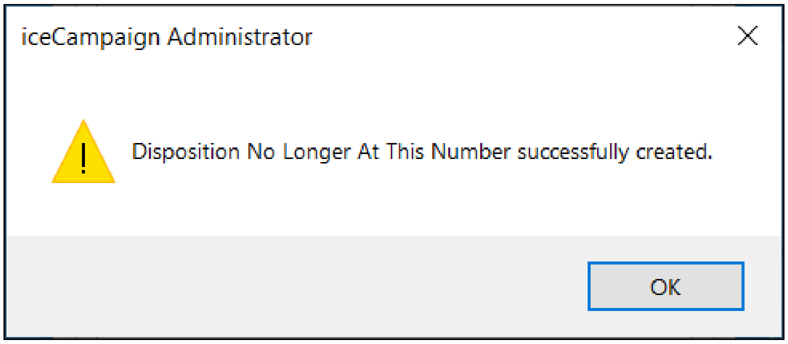
   A window opens:



5. Enter the name of the new disposition in the Disposition field.

6. Use the Campaign dropdown list to apply this disposition to a particular campaign, or leave it at <ALL> to apply the disposition to all campaigns.
7. Enable the checkbox ‘Remove from Waiting List for current Campaign’ to remove the prospect from the waiting list when the disposition code is applied.
8. Click *OK* to finish creating the new disposition, or click *Cancel* to discard the new disposition.

When the new disposition is successfully created, a window appears:



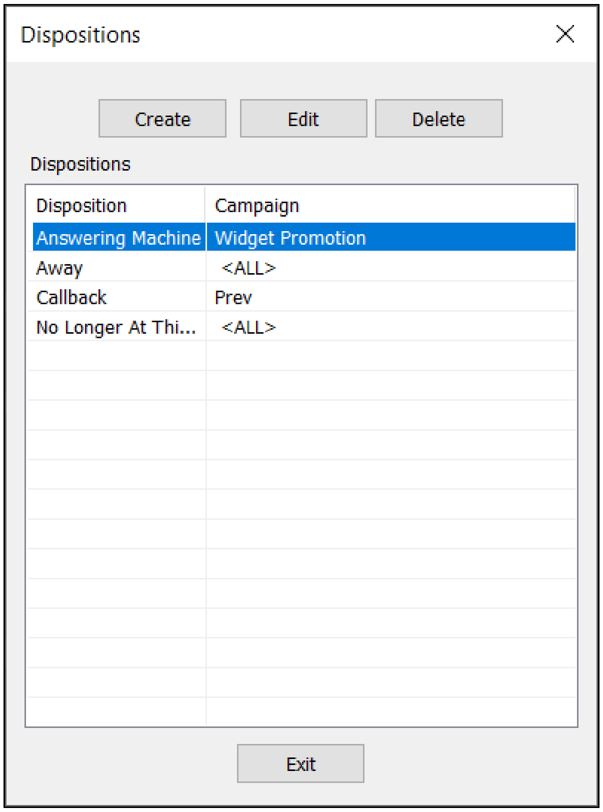
Editing Dispositions

1. Launch iceCampaign Administrator.

   The iceCampaign Administrator window opens.

2. Select *Create/Edit/Delete Dispositions*.

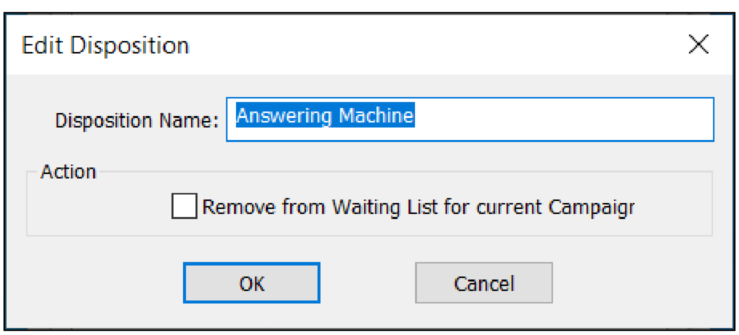
   A window opens:



3. Highlight/single-click the disposition code you wish to edit.

4. Select *Edit.*

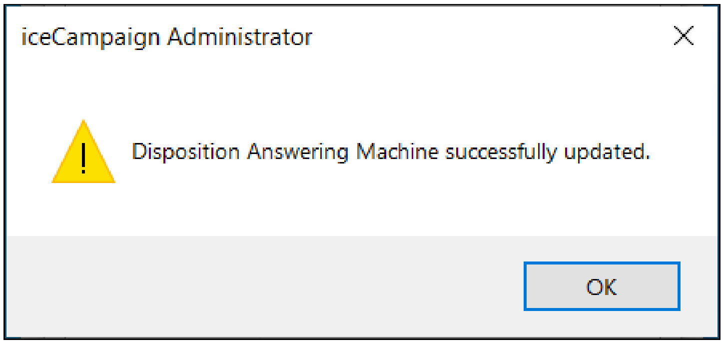
   A window opens:



5. Edit the name of the disposition, and/or enable/disable ‘Remove from Waiting List for current Campaign’.

6. Click *OK* to finish editing the disposition or click *Cancel* to discard your edits.

When the disposition has been successfully edited, a window appears:



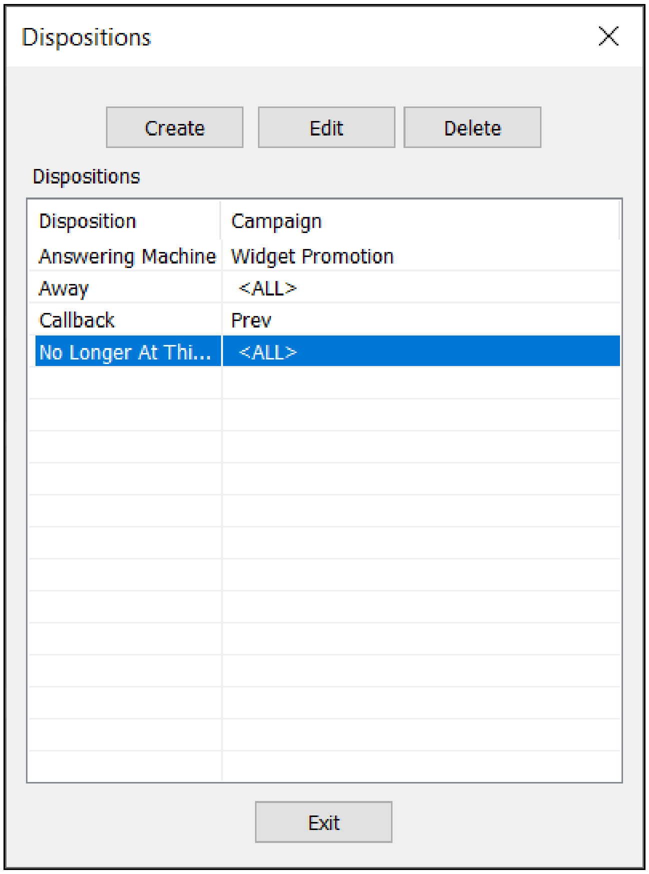
Deleting Dispositions

1. Launch iceCampaign Administrator.

   The iceCampaign Administrator window opens.

2. Select *Create/Edit/Delete Dispositions*.

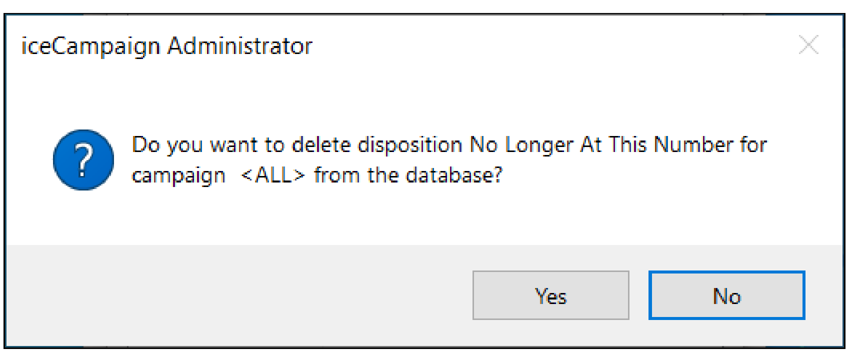
   A window opens:



3. Highlight/single-click the disposition you wish to delete.

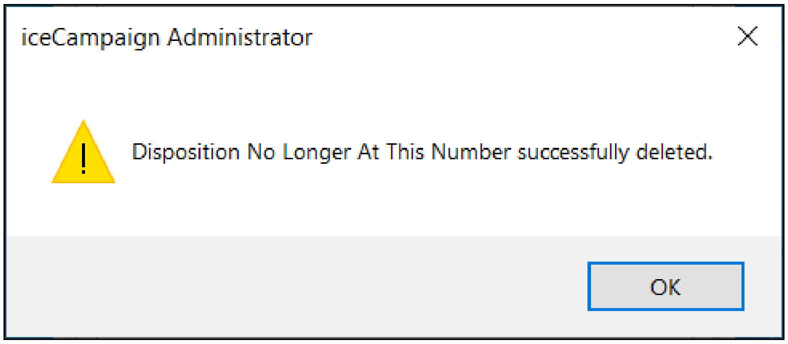
4. Click *Delete.*

   A window opens:



5. Click *Yes* to delete the disposition from its associated campaign. Click *No* if you do not wish to proceed with the deletion.

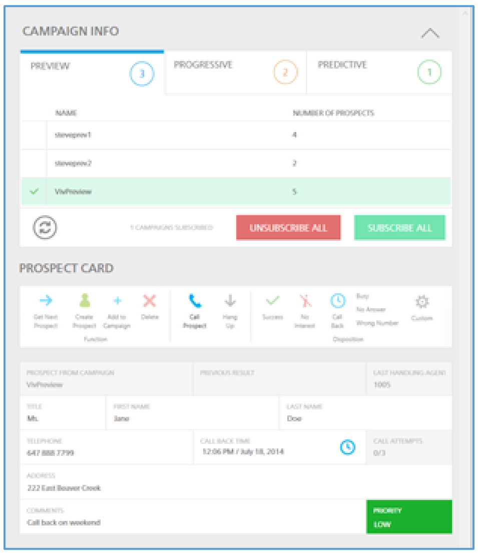
   When the disposition has been successfully deleted, a window appears:



Prospect Management

Edit Prospect List Field Labels

The Prospect Details frame in iceCampaign User shows standard fields and user-defined fields, as shown below.



The standard fields are described in detail in the section *Importing the Text File* starting on page 40.

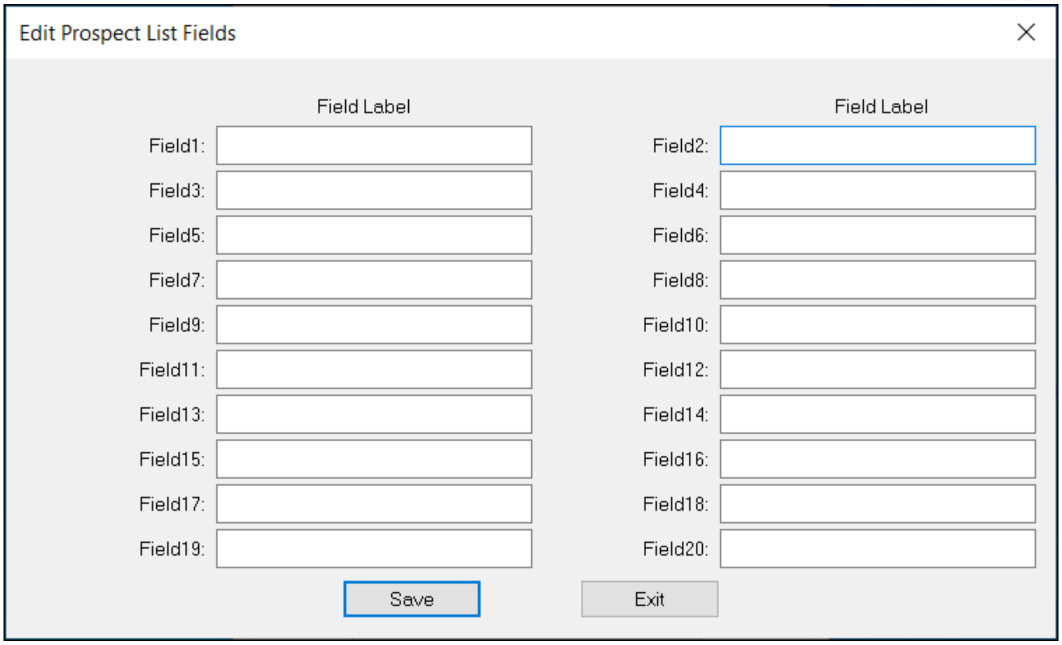
In addition to the standard fields, there are twenty fields that can hold information that is unique to your contact center. By default, these fields display ‘Undefined’ as the label until you customize them.

<u>To customize the ‘Undefined’ field labels in Prospect Details:</u>

1. Launch iceCampaign Administrator.
2. The ‘iceCampaign Administrator’ window opens.

4. Select *Edit Prospect List Field Labels*.

   The window 'Edit Prospect List Fields' opens, as shown below.



5. In Field1, type the name that you would like to appear beside that field in iceCampaign User.

   For example, you might want 'Account Number' to be displayed for that field. Each field accepts a maximum of 15 characters. Repeat this step if you would like to label any of the other fields.

6. Click *Save* to update the changes to iceCampaign User and close the window, or click Exit to cancel the changes and close the window.

   Users will see the new field name in iceCampaign User the next time they launch that application.

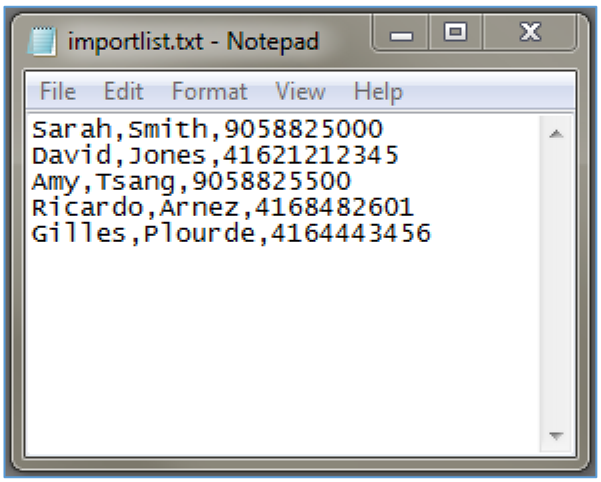
   Note: Customized fields apply to all campaigns.

Import Prospect List from Text File

Each outbound campaign is associated with a list of prospects, or individuals you wish to contact through the campaign. A list of prospects can be imported into the database from a text file. Users may also manually enter new prospects, but importing prospects to a campaign is more effective for updating the database with a large number of new prospects.

The Text File

Before the prospect data can be imported to the campaign database, the prospects must be set up in a text file, as shown below.



<u>The text file must meet the requirements specified below:</u>

- The file must be in text format.
- Each new line in the file is recognized as a prospect. Therefore, all of the information in a given line must pertain to a single prospect.
- The telephone number must contain numbers only. Do not include any dashes, brackets, or spaces in the number.
- The first name, last name, and telephone number are required fields for each prospect.
- The fields can be separated by a comma, whitespace, or a tab, and can be enclosed with double quotes or single quotes, as described in the section that follows.

Field Separators and Enclosures

A comma, whitespace, or a tab can separate fields. The information in each field can be enclosed in double quotes, single quotes, or it can appear without being enclosed in any characters. Below are some examples of data that can be imported into the campaign database:

- Comma, Double Quotes: “John”, “Wright”, “9058825000”
- Whitespace, Single Quotes: ‘John’ ‘Wright’ ‘9058825000’
- Tab, No Enclosure: John	Wright	9058825000

Each prospect, or each line in the text file, can contain Salutation, First Name, Last Name, Telephone Number, Address, and information for the 20 user-defined fields. Once the text file is created, follow the steps in the next section to import the data into the database.

Importing the Text File

Before you begin importing the data from the text file that you have already created, you must be certain of the order in which the information is arranged in the text file. Consider the example below:

Mrs. Sarah Lindsay 4167454567 Toronto

Mr. Richard Wright 15148825500 Montreal

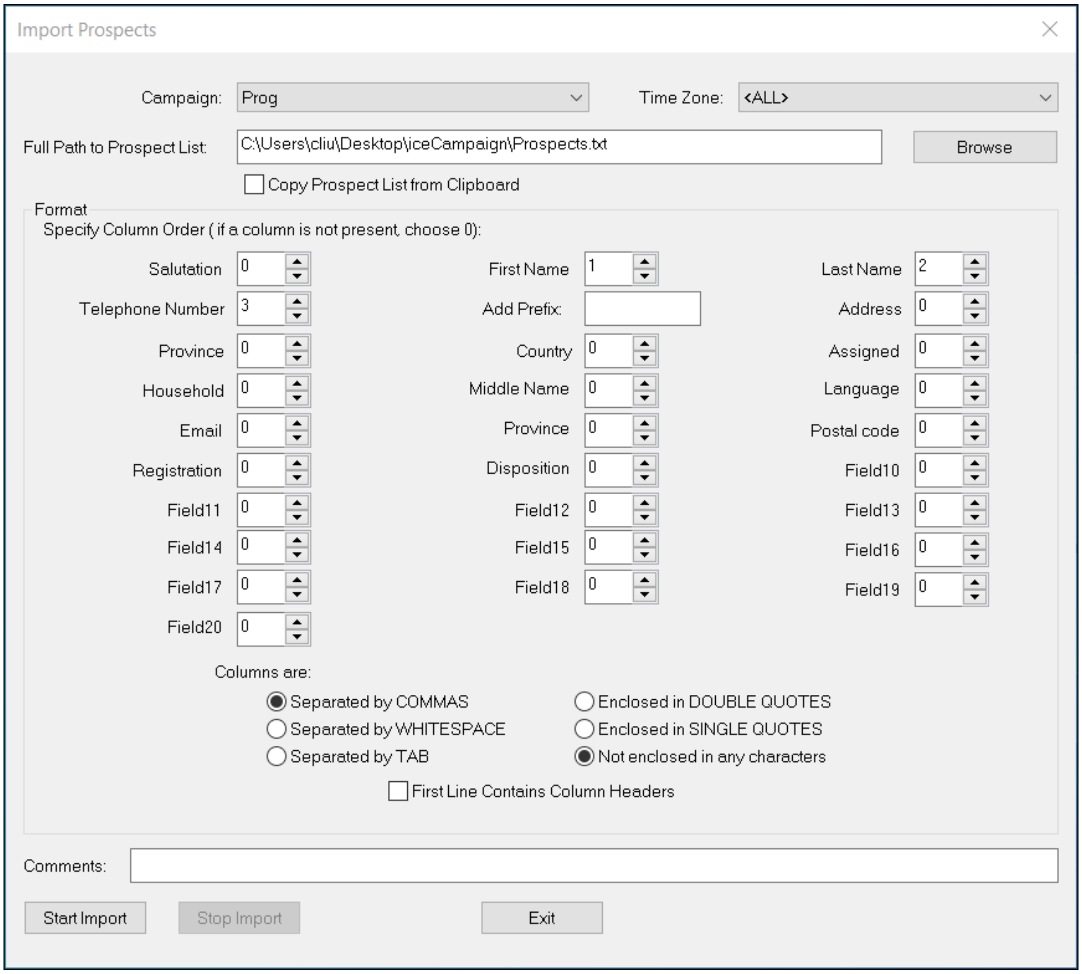
These prospects are arranged in the following order: Salutation, First Name, Last Name, Telephone Number, and Address. When following the steps to import the data to the campaign database, you must specify the order in which this information appears.

Note: First Name, Last Name, and Telephone Number are required fields.

To import the file:

Launch iceCampaign Administrator. The iceCampaign Administrator window opens.

Select *Import Prospect List from Text File*. The window ‘Import Prospects’ opens, as shown below.



Complete the fields, as required. Select a number to represent the column in the text file where the information is located. The prefix is the number dialed before placing an outbound call. The table that follows has a complete description of each field.

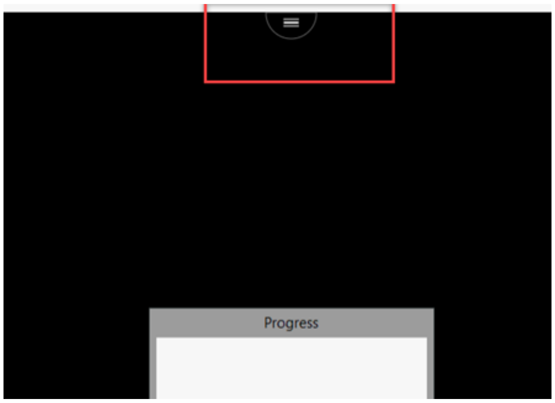
Important: Campaign must be selected and Time Zone must be as well. Area codes are loaded and iceCampaign will check the numbers that are imported to ensure accuracy, so make sure you select the appropriate description of how information is separated.

If you have a prospect list, it would only import prospects with area codes in that time zone.

If iceCampaign Administrator is hosted in Citrix, you must first import and save your text file to the Citrix desktop before entering the *Full Path to Prospect List*.

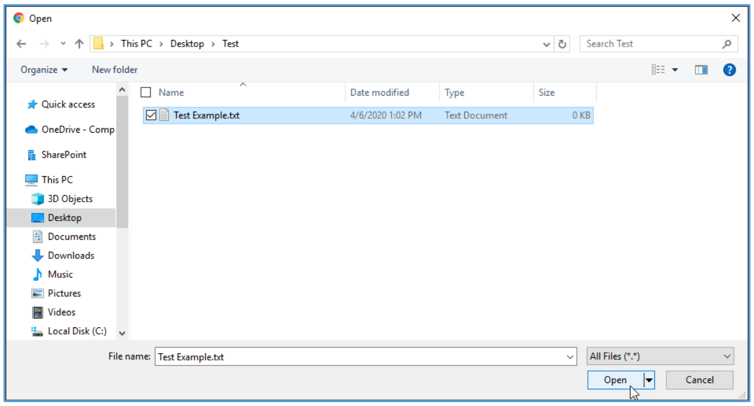
To import the text file to the Citrix desktop follow the steps below:

1. Click the semi-circle at the top-center of the Citrix window.

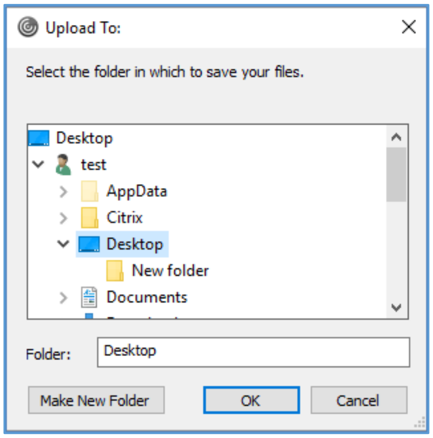


2. Select the Upload button to upload the file into the Citrix environment.

3. Find the document on your workstation and click Open.

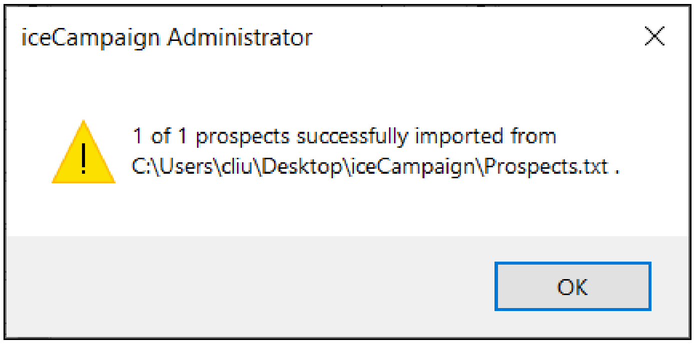


4. Select the directory on the Citrix environment to upload the document and click OK to save the file.



To complete the import, follow the steps below:

1. Click *Start Import* to begin importing the data to the iceCampaign database. A confirmation message appears when the importing is complete, as shown below.



2. Click *OK* to close the confirmation message window, and click *Exit* to close the ‘Import Prospects’ window.

   The table below describes the fields that can be completed when importing a list of prospects:

Importing a Prospect List	
Field	**Description**
Campaign	A drop-down list showing all campaigns. Select the campaign to which you want to import prospects.
Time Zone	Choose a time zone for this prospect list.
Full Path to Prospect List	Enter the path to the text file you have already created. The *Browse* button can be used to locate the file, if necessary. **Note:** If you the iceCampaign Administrator is hosted in Citrix, you must first upload your text file to the Citrix desktop.
Browse	Click *Browse* to locate the text file on your pc or network, if necessary.
Salutation, First Name, Last Name, Telephone Number, Address, Customizable Fields	For each field, select a number to represent the column in the text file where the information is located. For example, if the first name of the prospect is in the second column, then the number in the First Name field should be *2*. If there is no column that represents the first name in the text file, then the number in the First Name field should be *0.* **Note:** First Name, Last Name, and Telephone Number fields are mandatory.
Add Prefix	Enter the prefix that the user normally dials to place an outbound call.

Importing a Prospect List	
Field	**Description**
Commas/ Whitespace /Tab	Select ‘Separated by Commas’, ‘Separated by Whitespace’, or ‘Separated by Tab’ to indicate the separator of fields in the text file. Refer to page 39 for more information.
Double Quotes/ Single Quotes/ No Enclosure	Select ‘Enclosed in Double Quotes’, ‘Enclosed in Single Quotes’, or ‘Not enclosed in any characters’ to indicate the enclosures of fields in the text file. Refer to page 39 for more information.
First Line Contains Headers	Check this option if your text file has column headers.
Comments	A comment can be added to this field. This general comment is applied to all prospects that are imported from the text file.

Copy/Move Prospects

iceCampaign Administrator users can copy prospects from one campaign to another.

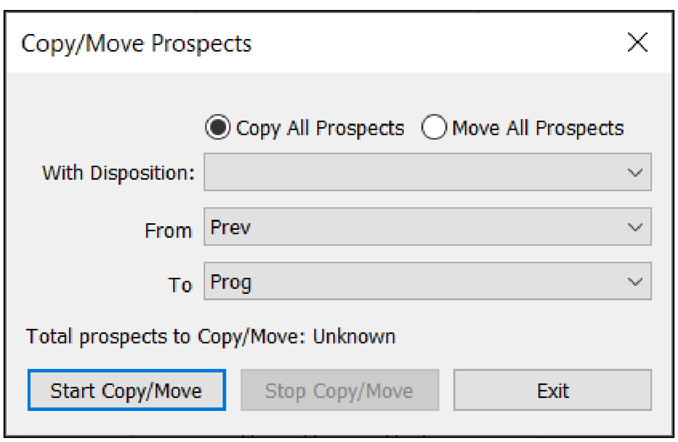
<u>To copy/move a prospect from one campaign to another:</u>

1. Launch iceCampaign Administrator.

   The iceCampaign Administrator window opens.

2. Select *Copy/Move Prospects*.

   The window ‘Copy/Move Prospects’ opens, as shown below.

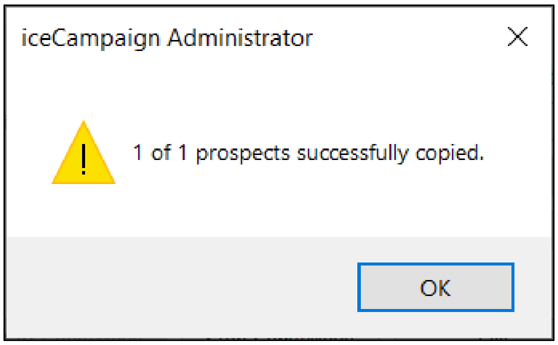


3. Select the ‘Copy All Prospects’ radio button to copy prospects to another campaign, or the ‘Move All Prospects’ radio button to move prospects to another campaign.

4. Select a disposition of the prospects. Only prospects with this disposition will be Copy/ Moved.
5. Select the campaign whose prospects you wish to copy or move from the ‘From Campaign’ drop-down list.
6. Select the campaign to which you wish to copy or move the prospects from the ‘To Campaign’ drop-down list. Click *Start Copy/Move* to begin the copying or moving of the prospects.

   Click *Exit* if you decide you do not want to copy or move the prospects.

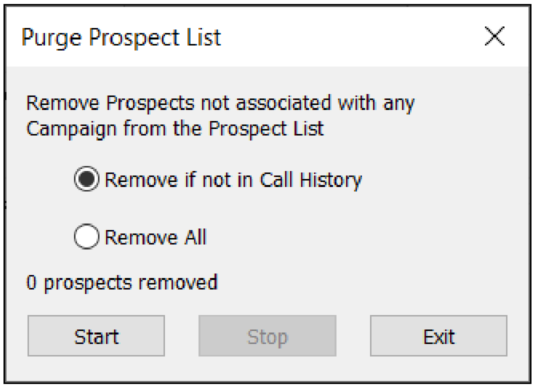
   When the prospects have been copied or moved a confirmation window appears, as shown below.

   While the prospects are being copied or moved, you may click the *Stop Copy/Move* button to stop the prospects from being copied or moved.
7. Click *OK* to close the message window, and click *Exit* to close the ‘Copy/Move Prospects’ window.

Purge Prospect List

iceCampaign Administrators can purge prospect lists from the Main Menu.

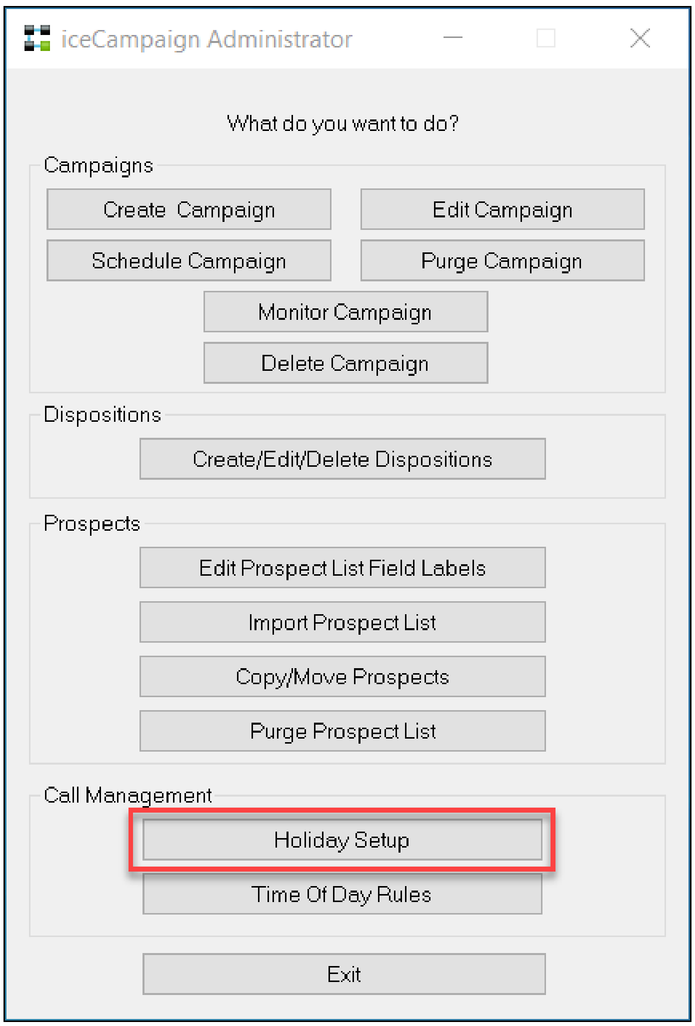


Call Management

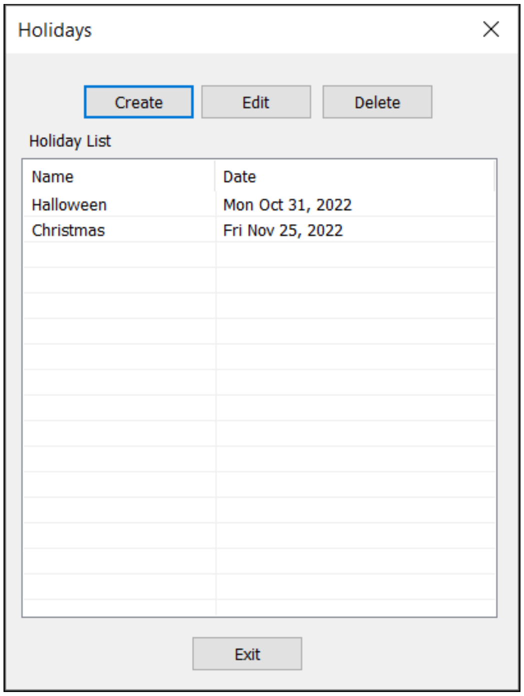
Prior to calling prospects, ice will check all time of day settings in the following order: Campaign schedule, then Holiday rules, then Time of Day rules. For information on changing Campaign schedule, refer to Schedule a Campaign on page 20. Information on holiday rules and Time of Day rules will be discussed in this section.

Holiday Setup

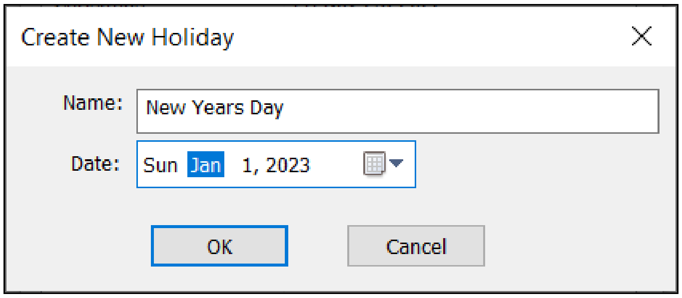
Holidays can be configured to ensure that calls do not go out on specific dates. A list of existing holidays can be found in the Holiday List. The Holiday List is accessed from the Holiday Setup button on the Main Menu.



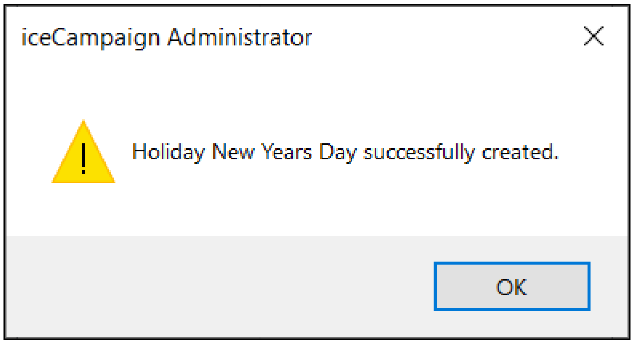
Once you have clicked Holiday Setup, the Holidays window appears.



To create a new holiday, click Create. The Create New Holiday window appears. Fill and modify the fields.

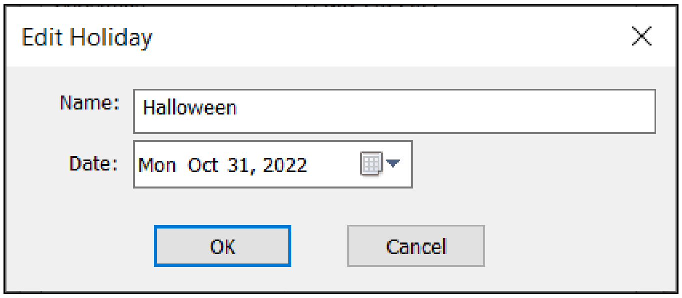


Click OK to create the holiday. Click Cancel to cancel the operation.

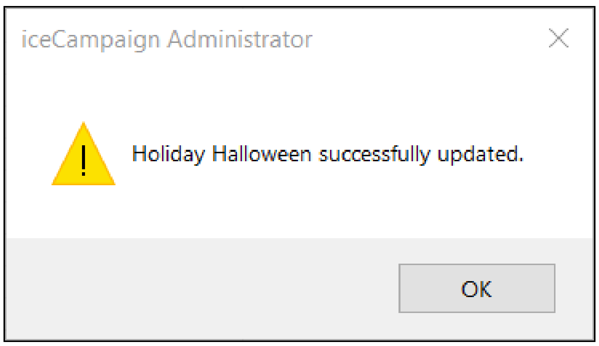


To edit an existing holiday, highlight the holiday of interest and click Edit.

The following window appears:

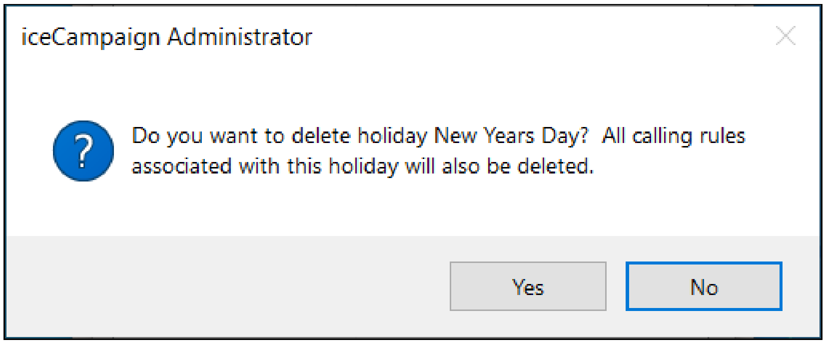


Make changes and click OK.

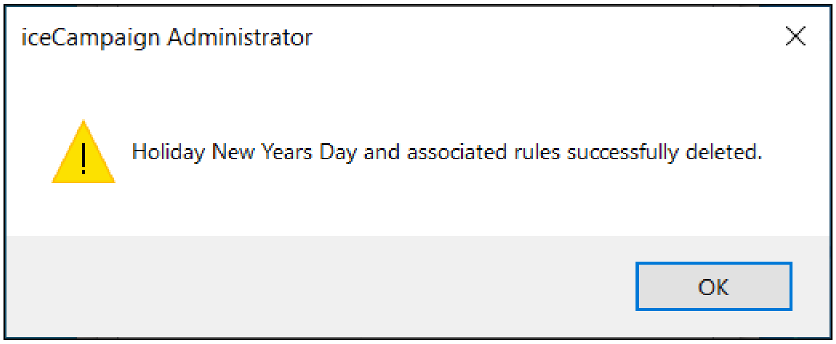


To delete an existing holiday, highlight the appropriate entry and click Delete.

You will see the following warning message:



Once you click Yes, the holiday entry and associated rules are deleted.

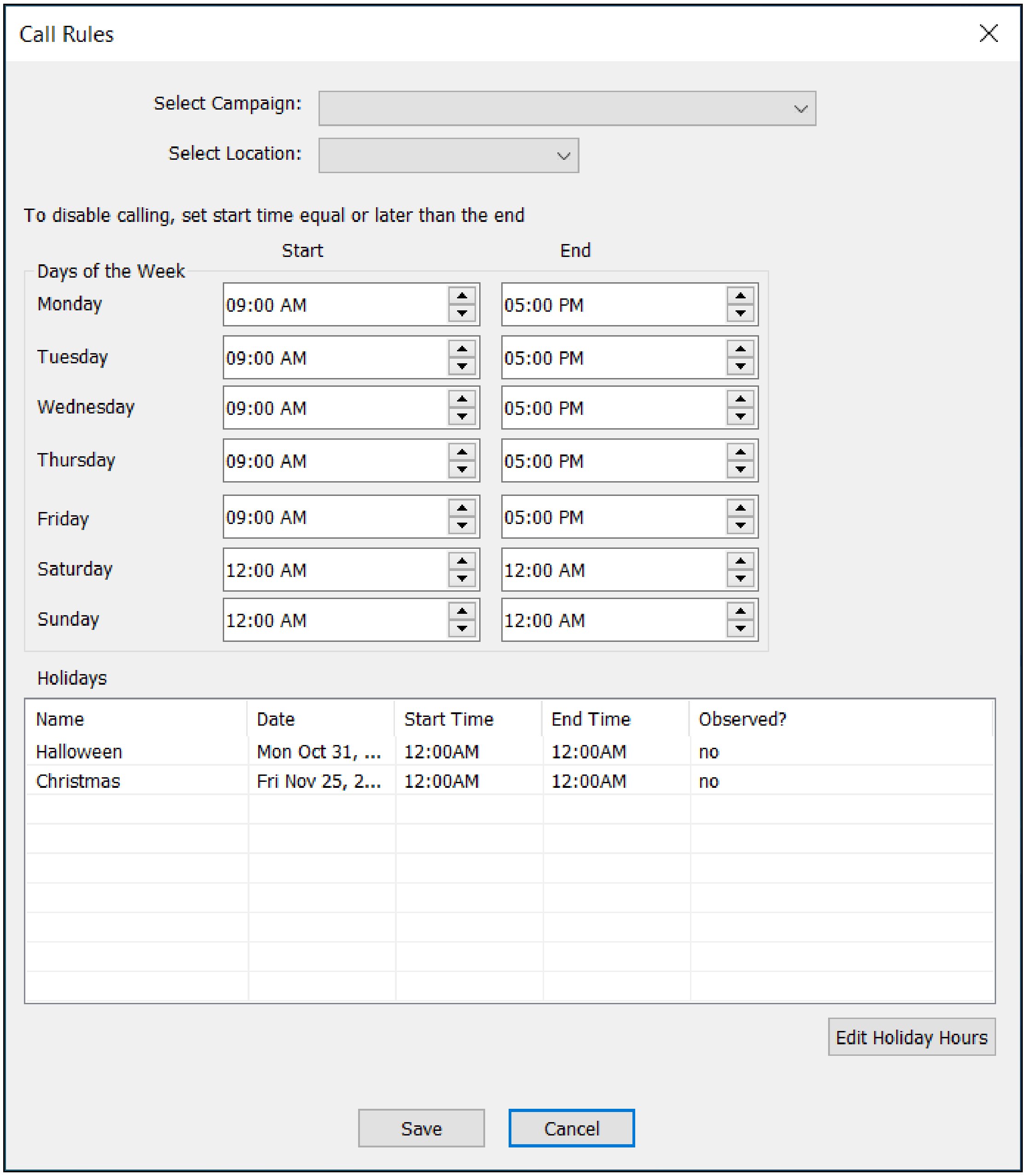


Time of Day Rules

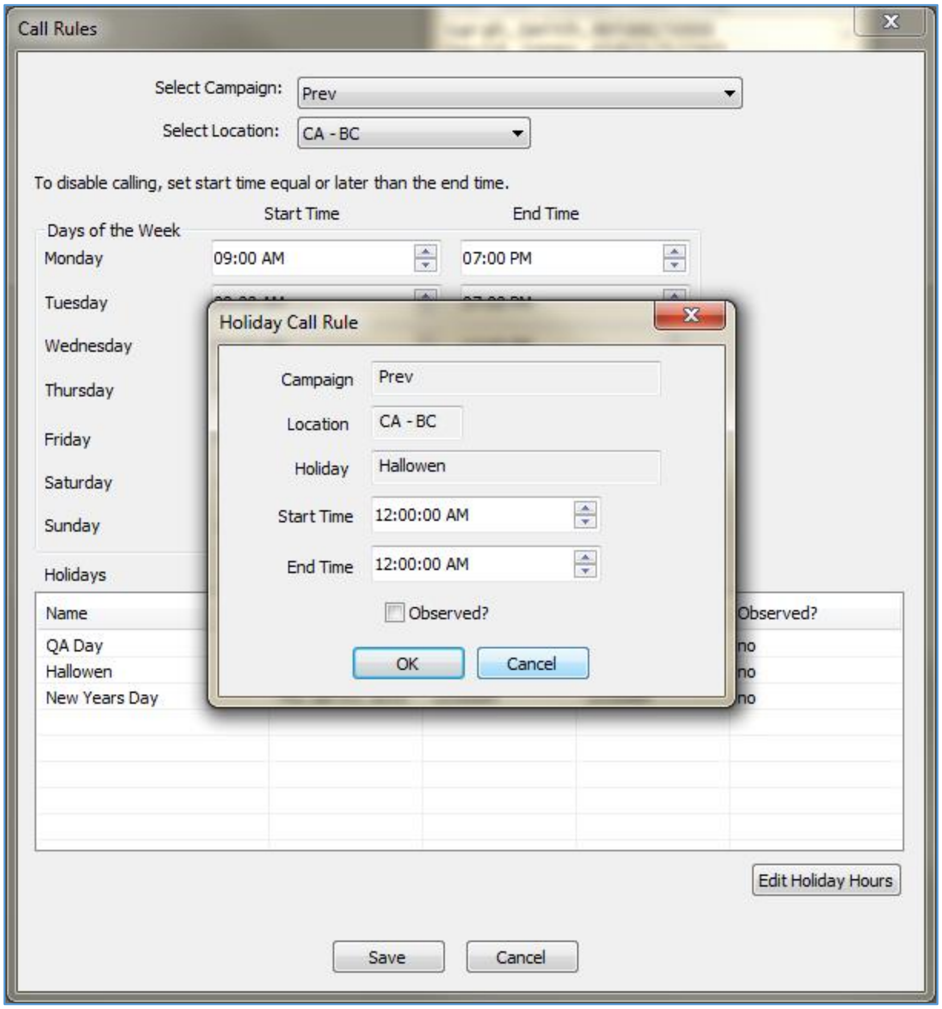
iceCampaign Administrators can customize call rules for each campaign, to specify if that holiday is observed for that location/province.

<u>To modify Time of Day rules for a specific campaign targeting a location, complete the following steps:</u>

1. Select Campaign and Location from the drop-down menus.



2. Highlight the holiday you want to modify.
3. Click Edit Holiday Hours to bring up the Holiday Call Rule window.



If Observed? is checked, then iceCampaign will call prospects as per the Start Time and End Time specified in the Holiday Call Rule window.

If Observed? is not checked, then iceCampaign will call prospects based on the hours specified for the day that holiday falls in, as per the hours specified in the Campaign Schedule window.

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