Oracle® Campaign Plus

Concepts and Procedures

Release 11*i*

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Part No. A86083-01

Oracle Campaign Plus Concepts and Procedures, Release 11*i*

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Preface

Welcome to the Oracle Customer Relationship Management, Release 11*i*, suite of applications.

This Concepts and Procedures provides information and instructions to help you work effectively with Oracle Campaign Plus.

This preface explains how Concepts and Procedures is organized and introduces other sources of information that can help you.

Intended Audience

This guide is aimed at the following users:

- Technical Service Representatives (TSR)
- Customer Service Representatives (CSR)
- System Administrators (SA), Database Administrators (DBA), and others with similar responsibility
- Call Center Managers and Supervisors

This guide assumes you have the following prerequisites:

1. Understanding of computer-telephony integration (CTI)
2. Understanding of call center technology
3. Understanding of the company business processes
4. Understanding of Oracle databases

Structure

This manual contains the following sections:

“Understanding Oracle Campaign Plus" provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application’s relationships to other Oracle or third-party applications.

“Implementing Oracle Campaign Plus” provides general descriptions of the setup and configuration tasks required to implement the application successfully.

“Administering Oracle Campaign Plus" provides task-based procedures for required for ongoing system maintenance and includes information on administration tools and utilities.

Related Documents

For more information, see the following manuals:

- *Installing Oracle Campaign Plus*

Oracle Campaign Plus

Oracle Campaign Plus, along with Oracle Predictive, is a module of Oracle Advanced Outbound. Oracle Campaign Plus offers a comprehensive tool to manage and execute strategic outbound interaction center campaigns in order to achieve ultimate list penetration.

This document covers the following sections:

Understanding Oracle Campaign Plus

Provides background information that you will need to understand the application and perform the tasks within the application.

Implementing Oracle Campaign Plus

Provides setup and configuration information.

Administering Oracle Campaign Plus

Provides information about modifying and managing settings within the application.

Understanding Oracle Campaign Plus

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

This topic group covers the following topics:

What is Campaign Plus?

The Oracle Campaign Plus module is one of Oracle's outbound interaction center products used to manage sales and service contacts. As one of the most sophisticated tools in the market today for campaign execution and management, Oracle Campaign Plus provides capabilities to maximize outbound list penetration resulting in better sales revenues or service contacts. As a list management utility coupled with the Oracle Predictive module to form Oracle Advanced Outbound, Oracle Campaign Plus helps interaction centers manage outbound telesales, telemarketing, teleservice, retention and other call center campaigns with capabilities ranging from real-time monitoring of list activity to dynamic list segmentation, and from list scoring of best contacts to intelligent recycling of non-contacted customers.

To use Oracle Campaign Plus most effectively in your call center, you should understand the fundamental concepts behind list management. This section provides an overview of all the functions and structures that make up Oracle Campaign Plus.

About Campaign Plus Services

Oracle Campaign Plus performs functions necessary to manage lists. Lists are groups of customer records that have been segmented, by demographics, age, or income for example, based on fields within the database records. Campaign Plus manages these lists by implementing a Campaign Plus Service, which is a process that runs on the NT server.

A Campaign Plus Service is a software program that gives customer records to outbound agents when the agents request records or are available for new records. Your call center may have one service or many services. Each service has the same primary role: to provide the right customer records at the right time to the right agent.

A Campaign Plus service performs its function by managing lists of records. Lists have different sets of customer records, different priorities, different strategies for releasing the records, and perhaps even different dialing methodologies. Each service can handle up to 32,000 different lists simultaneously.

All of your customers can be referenced by a single list, but that usually is not the most effective method of organizing your information. Instead, lists are usually organized into campaigns.

Campaign Plus Service Creation Checklist

Before you begin to create a Campaign Plus service, you should gather certain information. Start by talking with supervisors or managers about how they envision using the new outbound service. Some questions that need to be asked and answered include:

- What campaigns will be associated with this new Campaign Plus service?
  - Campaign names?

- What sub-fields are needed from the customer records (this will determine the segmentation parameters)?
- Are the selected fields less than 1kb?

- How are the lists segmented?
  - By time zone?
  - By geographical, demographic, or market information?
  - Time zone in combination with other geographical or demographic data?
- What other lists are needed?
  - Wrong number?
  - Not contacted?
  - Busy?
  - Scheduled callback, etc.?
- What are the database structural specifics that you need for setting up a service?
  - What is the account ID field?
  - What are the name fields (used for screen pop)?
  - What are the data fields?
  - What is the Campaign database name?
- If segmentation requires customer demographics, what data fields contain this information?
  - These fields must be named as the Campaign Plus service data fields so that the data gets passed to the lists and selection criteria can evaluate.
  - List these fields in the order in which they should appear in the service data fields parameter.
- What are the name fields for the customer table?
- Will lists need to be sorted? If so, make sure that the service data fields specify the fields that may be used for list sorts.
- What telephony methodology is to be used?
  - Will different campaigns use different dialing methods?
  - Will different lists use different dialing methods?

What is a Campaign Plus Campaign?

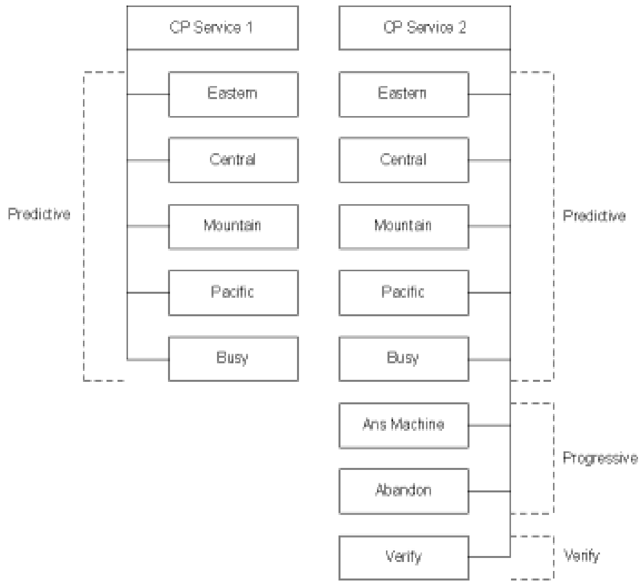
A Campaign Plus campaign consists of all lists referencing customers who are being called for a particular outbound objective. It may be a telesales campaign, a survey, a fund-raiser, a verification campaign, or a welcome or other service campaign.

Often, customers from different campaigns are also customers from different lead sources. For instance, in a call center that sells credit cards for different banks, each bank may provide its own sets of customers. Each bank’s customers are considered to be a different campaign, although the agent contact and presentation may be similar. A campaign is usually segmented into more than one list based on some combination of customer demographics. In a large country such as the United States, the most common list segmentation method is by time zone; however, the lists can also be segmented by income, bank balance, age, and/or any other combination of demographics.

> **Note:** Only one Campaign Plus campaign should be created when utilizing Predictive dialing. Predictive gives availability of agents priority over availability of agent assignment. Combining campaigns when using predictive dialing could result in agents receiving records from Campaign Plus campaigns to which they have not been assigned.

How Does Campaign Plus Allow me to Manage my Campaigns?

Effective campaign management is fundamental to an effective outbound strategy. The campaign identifies the group of customers targeted for a telemarketing promotion; thus, the campaign is the most common method of organizing customer lists. Campaign Plus does more than simply allow you to organize your lists by campaign; it allows you to organize simultaneous campaigns, use different dialing strategies for each campaign, and specify different selection criteria for each list. Finally, Campaign Plus allows you to assess the performance of a list.



Number of Simultaneous Campaigns

Your call center can run an unlimited number of simultaneous campaigns, each of which can be managed separately. You can have from 1 to over 1,000 agents in a campaign. Campaigns can easily be created to react to buying trends.

Dialing Methods

Each campaign can have a different dialing method. A dialing method is the mode by which the system dials the customer telephone numbers as it passes the records to the agents. Automated dialing enhances productivity and list penetration because it dials the customer telephone numbers much faster than the agents can, and it never makes an error.

Campaign Plus allows you to set up different campaigns and lists with different dialing methods. Within a single campaign, the different lists can also have different dialing methods.

The table below lists the different dialing methods along with a description of each:

Type	Definition
Predictive	Uses an algorithm based on call anticipation to set the outbound call rate while screening noncontact outcomes. The answered call and the customer record arrive at the agent's workstation simultaneously. You must have an Oracle Predictive service installed and configured to select this method.
Preview	Allows the agent to review the customer profile before initiating a call.
Progressive	Displays the customer record to the agent as the customer number is dialed.
Timed Preview	Allows the agent to review the customer profile for a set period of time and then automatically launches the call.

Combining Campaign Plus Campaigns

Campaign Plus campaigns can be combined for outbound calling so that they share the same Campaign Plus service. This allows you to combine the lists of smaller campaigns into a single large campaign for predictive dialing. The advantages of combining campaigns and using a large number of agents helps reduce abandons and reduces agent's wait time.

> **Note:** While there are some benefits to combining Campaign Plus campaigns, it is not recommended when utilizing Predictive dialing. Predictive gives availability of agents priority over availability of agent assignment. Combining campaigns when using predictive dialing could result in agents receiving records from Campaign Plus campaigns to which they have not been assigned.

What is a List?

A list is a data structure containing information about one or more customer records. A list does not reproduce the customer database; each record in the list points back to a real customer account in one of your customer databases. More specifically, each record in the list only reflects the subset of fields needed for a screen pop and to meet the list segmentation criteria.

The purpose of a list is to identify a particular segment of customer records. Once a segment has been identified, an administrator can control the conditions under which the records are called.

Required List Information

Each list contains some required information, in addition to information that can be set by the System Administrator. The type of information is as follows:

Type	Description
Required	■ Time zone of the customer record ■ Telephone number ■ Unique customer identification number acting as a reference back to the customer record
Set by Administrator	■ Customer name (added through Campaign Plus) ■ Fields that can be used for sort selection and segmentation

Additional List Information

Along with the customer-specific information, each list contains additional parameters to facilitate list management:

Type	Description
List calendar	Defines the days of the week and hours of the day that records in the list can be called. It also defines the time zone of the list, which affects its open and close time relative to the server time zone (i.e., the time zone in which the server is located).
List priority	Defines a release priority for customer records in the list.
List release criteria	Defines the conditions that must exist in order for a record to be released from a list. For example, a release criteria of ‘Income > 20,000’ would allow only those accounts with an income level of above $20,000 to be released for calling.

Type	Description
List quantum	Defines the number of customer records that should be read from a list before Campaign Plus moves on to the next list. It is useful for balancing records across lists of different lengths, so that proportionally the same number of records from each list are called.
Time-based indicator	Indicates whether Campaign Plus needs to obey a date and time stamp on customer records. If the time-based indicator is turned on, then Campaign Plus cannot release a customer record until, at, or after the time stamp on the record (unless the exhaustion availability option is set for the list and no other records are available to the service).
Selection priority	Defines a priority for the selection of the records in the list once they are released.

List Segmentation Examples

The following are some of the ways that lists are commonly segmented:

Type	Description
Time zone grouping	A customer database may consist of customers from all over a particular country. Because many countries contains multiple time zones, it makes sense to segment the records by those time zones. By using time zone segmentation, a call center can insure that customer records are not called earlier or later than is acceptable for their time zones.
Regional grouping	A regional group allows you to place all the records in a particular region in a list. A benefit of this sort of grouping is that agents can be assigned to work on specific customer accounts within a single region.
Age	Age may be a method of segmenting customer accounts in circumstances where the age of a customer seems to affect their buying decisions. Thus, you can set up lists that concentrate on particular age groups.

Type	Description
Income	Income may also be a factor that influences the sales percentage. By combining customers with specific ranges of incomes, you can target the most effective lists for concentrated calling, while putting fewer resources into less profitable lists.
Call Outcomes	You can segment customers into lists based on past call outcomes. A call outcome is the specific consequence that has occurred after a contact with a customer, such as “Interested” or “Send Literature” or “Not Interested.” Since lists can be segmented by call outcomes, you can set up special lists for re-contacting customers based on the call outcomes. Campaign Plus only receives call outcomes. Results and reasons are logged in Interaction Center Intelligence.

You can segment lists based on any geographic or demographic information available in the customer records. Campaign Plus’ on-line segmentation and sorting capabilities allow you to fine tune outbound calling so that it matches the conditions you think are critical.

Note: These fields must be selected and included in the data field when creating the Campaign Plus service.

What is List Management?

List management is the process of setting up lists so that they operate effectively. Management activities include setting up the lists, looking at list performance, and setting up selection and release criteria. These activities are made easy when you use Campaign Plus.

List Management is simplified because Campaign Plus is so flexible and allows:

- Unlimited number of lists
  - It can control up to 32,000 lists per Campaign Plus Service.
  - It can control multiple campaigns and list groups.
  - It can have an unlimited number of simultaneously running services.

- Dynamic creation and deletion of lists
  - Campaign Plus can add new lists to a campaign while the service is active.
  - You can quickly delete lists and replace them with new lists.
  - You can move customer accounts from one list to another while agents are calling.
- List segmentation logic.
  - Each list contains its own segmentation or selection logic.
  - You can easily look at the list's logic to see what records are in the list.
  - Reorganizations can check to see if records in the list match the segmentation criteria.
- User defined data
  - Lists can contain user-defined data.
  - Any data in a list is available to the agent application.
- List sorting
  - You can sort a list on any of its information, including fields that have been added as part of the user-defined data.
- List calendars
  - Each list has its own scheduling calendar that can override the calendar associated with its service, campaign, or list group.
  - Campaign Plus opens and closes the list based on the calendar.

Modifications to Lists and List Groups

Through Campaign Plus, you can monitor lists and modify them on-line.

- Records can be moved from one list to another;
  - You can quickly combine records into a single list for outbound calling.
- Records can be effectively removed from lists;
  - Inbound callers can be placed on the “DNC list” which will remove them from lists that are being called.
- Records can be easily exported to other applications or systems.

About Loading Customer Records Into Lists

A load is the process that copies a small subset of data from customer records in the customer database into lists. At a minimum, a load process copies the unique identification number, telephone number, and time zone into a list record. When other fields are defined as part of the list record (such as the customer's name and other data fields), Campaign Plus also copies this data from the customer database into the list. Loads let you create new lists or append records to lists from which agents are currently calling.

Lists are loaded from three possible sources, directly from the Campaign database, from Oracle Marketing, or from a flat transaction file.

When loading from Oracle Marketing, load from the table RMS_List_Entries.

Flat transaction files let you load from a variety of sources, including:

- Popular PC packages (for example, Excel and other PC programs that can create flat ASCII files)
- IBM and other mainframe hosts
- UNIX and other mini-computer systems

What Happens When I Load Customer Records Into a List?

When you perform a load to place new customer records into a list, you specify a particular campaign or service. The load process uses the selection criteria that you define to place the records into specific lists.

Lists can be segmented by data that is stored in the list structure (data fields), including:

- time zone
- profession
- region or territory
- purchasing history
- product affinity
- payment cycle (for collections systems)
- "sample group" (for surveys)

or any combination of the data in the database.

Note: While both data and named fields are selected from the customer record, data fields are used for list segmentation and named fields are utilized as part of the screen pop.

About Segmentation Criteria

List selection criteria is embedded within each Campaign Plus Service and its lists. Campaign Plus provides three levels of selection for separating a database's records into lists:

5. Campaign Plus service selection criteria is the first level of selection logic that a record must pass in order to be placed in a list. This usually consists of global selection. If you wanted to see "all records with phone numbers" and/or "all records that do not have a Do Not Call Flag set to Yes," you could set the selection criteria to display records that meet that criteria.
6. The second level of selection logic is at the list level. Each list contains a parameter called list selection criteria. The list selection criteria is a Boolean selection statement that defines the conditions under which a customer account is placed in the list. For example, if you have segmented the lists by time zone, the selection criteria for all records in the Eastern time zone list would be: Where time zone is the East Coast, or in technical terms: `TIME_ZONE = '2'`.
7. The third level of selection logic is also at the list level. If two or more lists allow a customer account to be a member, Campaign Plus looks at a selection priority field of the list to determine which list should get the record. The list with the higher selection priority gets the customer account.

What is Record Release Management?

Record release management controls the order, mix, and time constraints for the release of records within individual lists. Using Campaign Plus, you can monitor and modify different factors to control lead distribution.

What are List Release Priorities?

List Release priorities determine the relative priority of a list in comparison to other lists owned by the Campaign Plus service.

Every list has a release priority. Priorities allow Campaign Plus to distinguish between "high" priority lists and "low" priority lists. High priority lists are those with a release priority between 1 and 50. Low priority lists have release priorities between 51 and 100.

High priority lists will first be exhausted by their priority level; if high priority lists have equal priorities, Campaign Plus selects records in a round-robin fashion. When all available records from a high priority list have been exhausted, Campaign Plus selects records from lower priority lists in a round robin manner. The order from which Campaign Plus performs the round robin is determined by the priority level. This order is very important, because setting a high priority on a list may have the effect of exhausting that list before Campaign Plus moves on to any other list in the campaign.

Oracle often recommends that time-based lists (for example, the Busy and Priority Callback lists) have high priorities, and that all other lists have low priorities. This insures that records that need to be called back at specific dates and times are called before those that have no assigned callback dates and times. When Campaign Plus sees that no more records are available in the time-based lists (because they are scheduled for future callback), then it automatically begins the round-robin process among lists with lower priorities.

What are List Release Strategies?

List release strategies affect how the records are released to be dialed. Several strategies, including Quantum, Quota, and Scoring are discussed.

Type	Definition
Quantum	Supports proportional calling across all list associated with the campaign or list group. In the Quantum box, type the number of records to be released sequentially from this list in the campaign. Zero has no quantum restrictions.
Quota	Shuts down the list when a specified number of successful records are released within a specified time. Type the number of records in the Quota box. Set the reset time period after which the list should restart.
Average Score	Adjusts the quanta of the lists so that lists receiving better average results are called more heavily.
Total Score	Adjusts the quanta of the lists so that the lists receiving better total results are called more heavily.

View one of the following for more information:

About Quantum Release Strategy

The Quantum Release Strategy supports proportional calling across all lists associated with the campaign or list group. It is considered the baseline strategy for a Campaign Plus service. It applies to all other release strategies as well.

The list quantum controls the number of records that can be sequentially dispersed from a list. This means that when Campaign Plus is distributing customer records to agents, it releases a quantum number of records from each list before it goes on to the next list in the campaign.

Every list has a quantum which you can dynamically adjust via Campaign Plus. Usually, a list's quantum is adjusted to reflect the proportion of customer records in that list compared to other lists in the campaign.

Without the concept of a quantum, Campaign Plus would read all records from one list before moving on to another list. This would exhaust each list in order. While a strategy of this sort may be useful in some instances (for instances, in a Collections application, where you want all of the 60-day overdue customers called before the 30-day customers), you generally want a mix of records from different lists.

Here is an example of how you might use list quanta:

If you have a list segmented by income, you might have a spread of customer records like the one illustrated in the following table.

No. of Records	Percentage	Income ($)	Quantum	List Name
1,500	15%	15,000 - 19,999	15	A
6,000	60%	20,000 - 30,999	60	B
1,500	15%	31,000 - 39,999	15	C
1,000	10%	40,000 - 99,999	10	D

In this example, Campaign Plus releases 15 records from List A, 60 from List B, 15 from List C, and 10 from List D. It then goes back to List A to release the next 15 records. As you can see, this helps control proportional calling across all lists; thus, at the end of the campaign, agents should have exhausted approximately the same percentage of records from the lists.

Using Campaign Plus, you can dynamically adjust a list's quantum. For instance, if you want to increase the proportion of calls to customer records with incomes between $31,000 and $39,000, you could change List C's list quantum to 30. After this adjustment is made, Campaign Plus will distribute 30 records in a row from that list the next time the list is accessed.

In addition to the adjustments you can make via Campaign Plus, Campaign Plus can automatically adjust the quantum for the Scoring Release Strategy, as we will describe below.

The Quantum Strategy is almost always used when records are segmented by time zone.

About Quota Release Strategy

The Quota Release Strategy shuts down a list when a pre-defined limit has been reached.

This strategy disburses records from a list based on the quota that is assigned to a list. A quota represents the maximum number of records with a certain outcome or result that should be obtained from that list during a pre-defined period of time (set by a Quota Reset Period value).

Quotas are reset at the end of a quota reset period (defined at the list level), so that the list is again available for calling. The raw values used to calculate the quota are dependent upon the outcome codes of each record and must be passed by the agent applications to Campaign Plus.

Due to its pre-defined limit, the Quota Release Strategy is useful for survey or appointment setting Campaign Plus campaigns.

About Scoring Release Strategy—Adaptive Marketing

This strategy adjusts record release to emphasize more effective lists for adaptive marketing.

Scoring is another type of release strategy. Campaign Plus adjusts the quanta of the lists based on the scores that the lists receive on records released from the lists, so that lists getting the best results are called more heavily. The agent application must provide a raw score to Campaign Plus. Scores can be either totaled or averaged.

Scoring strategies adjust the quanta of affected lists every 15 minutes.

Campaign Plus intelligently concentrates on lists that are more successful (have higher scores). This is called adaptive marketing.

For instance, in the previous example, let’s imagine that List A (which has a quantum of 15) is very successful. That is, more sales are made from it than from other lists. For every sale, the application updates the list’s score, and after 15 minutes, List A has the highest score of the four lists. With a Scoring Release Strategy, Campaign Plus sees that List A is outperforming the other lists, so it concentrates more on List A by raising List A’s quantum. Let’s say that Campaign Plus raises List A’s quantum from 15 to 20. Since it has raised the quantum by 5 records, it automatically adjusts the list quanta on the other lists down by 5. This means that the same number of records are being called (when you add together the quanta of all four lists, they still add up to the same number), but a higher percentage are from List A. (Campaign Plus will never adjust a list score to less than 1. That means that the total number of all quanta for a service may add up to be slightly more than the original, non-adjusted total quanta for all lists.)

Campaign Plus has adapted to the current selling environment and automatically increased your call center sales per hour.

What is Release Criteria and Release Control?

Certain conditions must be met in order for a record to be passed to an agent for outbound calling.

When Campaign Plus reads a record from a list, it automatically checks several levels of release criteria before releasing the record to an agent (or to Oracle Predictive). These criteria ensure that records are called only if they are “valid” for calling. This process is called release control.

About Campaign Plus Service Release Criteria

The Service release criteria specifies “global” release criteria.

Once Campaign Plus has selected a record for outbound calling (based on any of the release strategies we’ve just talked about), it checks to see if the record meets the conditions specified for the Campaign Plus service release criteria. The release criteria is expressed as a Boolean statement indicating the conditions that allow a record to be released.

The Campaign Plus evaluates any data contained within the list records against the release criteria. Thus, it can be based on any of the standard fields in the lists records, as well as any of the name fields and data fields defined as part of the structure of the records in the list.

The release criteria is a checkpoint that determines if a record should be attempted for an outbound call. Since it can be changed dynamically, it can be used to filter a subset of records already in the lists from being called. For example, if a football team just won the Super Bowl, you can use the release criteria to prevent all customers in the team's locale from being called until after the celebrations are over.

If the record passes the release criteria, Campaign Plus looks at the list release criteria to see if the record should be released from the list.

About List Release Criteria

The List Release criteria specifies criteria for releasing records at the list level.

The list release criteria parameter consists of a statement that defines the conditions that the record must pass to be released to a list. The list release criteria defines very specific conditions that would allow a record to be released from a list, thus refining any conditions specified by the Campaign Plus service release criteria.

Let's revisit the example used in the previous section, where a specific state's football team wins the Super Bowl. If you decide to concentrate not calling customers only in the immediate area where the game is played, you could specify the list release criteria so that the city had to equal to a specific city. That would allow customers outside of the city's area to be called, while leaving the remaining records in the list. Once the Super Bowl celebrations ended, you could change the list release criteria so that the customers in the specific city could be called.

Once a record has passed the list release criteria condition, Campaign Plus checks the Stop List to see if the record has been "stop-listed."

About Stop List Management (And TCPA Legislation)

In compliance with the Telephone Consumer Protection Act (TCPA), the Campaign Plus Stop List Module blocks certain records that may appear in a Campaign Plus list, so that they will not be dialed by Oracle Predictive or any other application that uses Campaign Plus.

You can install:

- One instance of the module to be shared by all Campaign Plus services
- Separate instances for each service

- Separate instances for certain services (and not for others)

Each Campaign Plus service will look in the Windows NT registry to locate its own stop list module. If it does not find one, it will look again for a system-wide instance.

Note: Only one custom release control module can be installed for a given Campaign Plus service. It is not possible to install and use other custom release control modules at the same time as the stop list module.

A database table (IEO_CP_STOP_LIST) identifies all records that are to be blocked. Data may be loaded into the table through any of several means (such as from Oracle CRM or an independent program). A record block can be limited by campaign and expiration date.

Campaign Plus looks for the stop list module when it is first asked to deliver a record to an application or to another service (such as Oracle Predictive).

Note: If Campaign Plus does not locate the stop list module, Campaign Plus will not attempt to locate it again until Campaign Plus is restarted.

Entries in the stop list table contain codes (STOP_LIST_CODE) that Campaign Plus interprets to determine how to handle each record. Blocked records can be:

Action	Stop List Code
Deleted (dropped) from the Campaign Plus list in which they appear	D, P, R, (also blank space or any letter other than the ones reserved for Recycle and Release)
Recycled (typically to another list)	C, X
Released for calling	S

Recycling is performed using conventional Campaign Plus recycle scripts. When the stop list code calls for a record to be recycled, Campaign Plus generates an internal “Return for Post-processing” transaction, and assigns the record an outcome code of “98.” This outcome code should be specifically handled in your Campaign Plus recycling script.

Note: In the quantum release strategy, a record which fails the stop list is not counted against the list’s quantum. Therefore, if a Campaign Plus list contains a very large number of records which are going to be blocked by the stop list, Campaign Plus can spend a substantial amount of time looking for a releasable record.

Each time the Stop List Module is called, it logs its actions both to the Campaign Plus service log file, and to a file named CUSTOMREL.LOG located in the default directory of the service. When Campaign Plus disconnects from the stop list module (such as when Campaign Plus shuts down), a stored procedure is run in the DBMS (database management system) that deletes expired records from the stop list table.

About Predicted List Exhaustion

Campaign Plus predicts when lists may become exhausted. You can see the predicted exhaustion date and time for each list using Campaign Plus. Some features of the exhaustion availability indicators include:

- Administrators can adjust quanta or release priorities to prevent a list from being exhausted too soon and before the end of a calling shift.
- Administrators can add new customers to any lists while the lists are active.

Exhaustion Availability

One of the controls that you can set on a list is a flag that indicates whether it should be made available to the service, if all of the other lists have been exhausted of records. This is called exhaustion availability, meaning that the list is available after all other lists are exhausted. If the list is time-stamped, Campaign Plus ignores the date/time on the accounts and accesses them in the order in which they appear in the lists. However, Campaign Plus does not ignore the starting and ending call times that are defined as part of the list’s calendar. In other words, if a list’s calendar indicates that it cannot be called after 9:00 p.m., Campaign Plus will not re-open the list, even if it has exhaustion availability.

What is Recycling?

One of the features that makes Campaign Plus so effective is the recycling of customer records. Recycling means that customers are called back at later dates and times. Recycling strategies are based on:

- Call outcome
- Date, day, and time of call
- Number of call attempts
- Phone type values

For instance, if a call ends up with a status of “Busy,” one can assume that it’s likely that the decision maker is at home. That means that you will want to call the customer back within a few minutes. Campaign Plus can automatically schedule a record with a busy outcome to be attempted in 10 minutes. On the next attempt, if the line is still busy, Campaign Plus can call back the customer in another 15 minutes.

Likewise, if there is a “No Answer” in the morning, Campaign Plus may schedule the next call to be attempted during the afternoon of the same day.

Call recycling also occurs for lists that have contact outcomes. For instance, some applications automatically schedule callbacks after a call has resulted in a literature request. The application may schedule a callback for five days in the future, giving the customer time to receive and review the mailing. After the five days have passed, Campaign Plus automatically calls the customer back, allowing the agent to reinforce the information sent by mail and close the sale.

Campaign Plus also allows you to recycle calls based on the type of phone called, thereby permitting you to determine when to call a particular phone type. Phone number type handling provides a more strategic avenue when trying to make contacts. For instance, you would be more likely to reach someone on a work phone between 9am and 5pm, on a home or cell phone between 7am and 9am as between 5pm and 8pm. The following is a list of phone types on which Campaign Plus can recycle:

- Home
- Work
- Mobile
- Pager
- Temporary

Your call center's recycling strategy is determined and setup by the system administrator. The strategy is used to create the Recycling File, which Campaign Plus uses to recycle calls.

What Benefits Does Recycling Provide?

Recycling provides the following benefits:

- Ensures optimal list penetration and contact rates through intelligent scheduling of callbacks.
- The recycling strategy can be modified using the user friendly interface provided in Campaign Plus.
- Each Campaign Plus service can have its own recycling strategy or share a recycling strategy.
- The recycling strategy is unified: it is shared by Oracle Predictive and Campaign Plus.

About On-line Monitoring and Control

On-line monitoring and control is provided through Campaign Plus. Campaign Plus has a graphical user interface consistent with the Windows environment.

Users can monitor:

- One campaign
- Multiple campaigns
- One list
- Multiple lists

Campaign Plus provides on-line feedback about each list, so that users can monitor what is happening with a list (or group of lists) at any time.

What Statistics can be Monitored in Real-Time?

Statistics that can be monitored on-line include:

- Records remaining in a list.
- Records released from a list during the last 1, 5, 15, 30, and 60 minutes.

- Predicted release of records from a list during the next 1, 5, 15, 30, and 60 minutes.
- Predicted date and time a list will be exhausted.
- The number of records loaded into a list and available for release.

About Real-Time Graphical Reports

You can see trends and statistics for lists and campaigns by looking at the real-time Graphical Reports. Through Campaign Plus, you can view any of the following reports:

Trend or Statistic Name	Description
List hourly calling trends	Displays the number of leads called in each list during each hour of the day
List percentage hourly calling trends	Displays the percentage of leads from each list that have been called during the day
List cumulative hourly calling trends	Displays the cumulative total number of leads called in each list during each hour of the day. This graph shows where Campaign Plus is focusing its calling
Campaign hourly calling trends	Displays the number of leads called in the campaigns during each hour of the day
Campaign percentage hourly calling trends	Displays the percentage of leads from the campaigns that have been called during the day
Campaign cumulative hourly calling trends	Displays the cumulative total number of leads called during each hour of the day
Leads activity in campaigns	Displays the distribution of available, unavailable, and total customer records in the campaigns
Current leads in lists	Displays the number and distribution of leads remaining in the lists

What Parameters can be Changed in Real-Time?

The following parameters can be changed on-line:

- list quantum

- list priority
- list and Campaign Plus service calendars (schedules)
- list release criteria
- list release strategy
- quota control and scoring
- recycling tables.

What List Management Activities can be Managed in Real-Time?

Many different activities can take place while a Campaign Plus service is active. Administrators can perform the following list management activities:

- Dynamically create and delete lists
- Modify list parameters, such as quantum, time-based flag, exhaustion availability, and many others
- Load new records into lists
- “Open” and “close” lists
- Print snapshots of list statistics

What is Reorganization?

Reorganization is an automatic process that optimizes the lists associated with a Campaign Plus service. It is performed automatically when the service shuts down, according to its calendar.

The activities performed include:

- Ensure information is safely stored on hard disk
- Eliminate wasted space
- Optimize the Campaign Plus service database so that it is more efficient
- Rewrite the service database
- Create a new backup file
- Eliminate duplicate IDs

About Error Recovery

Campaign Plus maintains journal logs of all operations. They contain a list of all events, including hardware failures. The “SUBMIT_*project*.LOG” file contains a record of all transactions. Campaign Plus automatically restores all lists to a consistent state after a hardware or software failure.

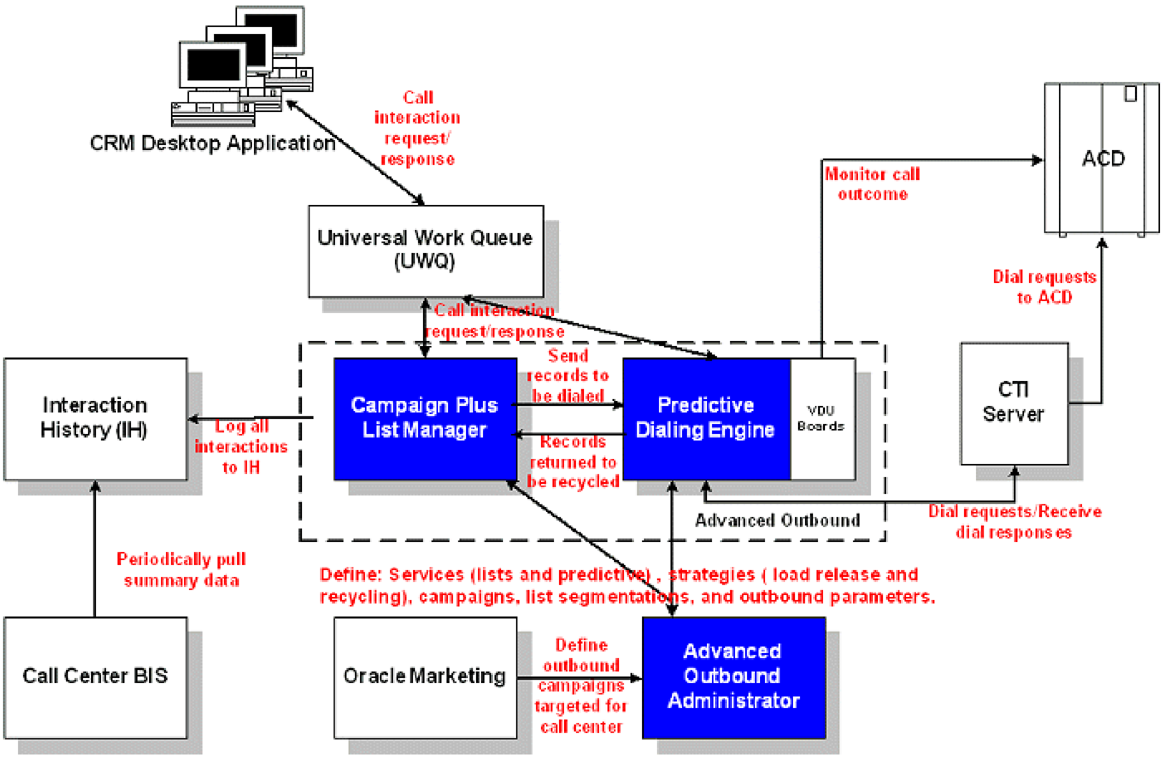
What is ICM?

ICM stands for Intelligent Call Manager. It is a new call router product supported in Campaign Plus for Predictive. ICM supports remote internet connections.

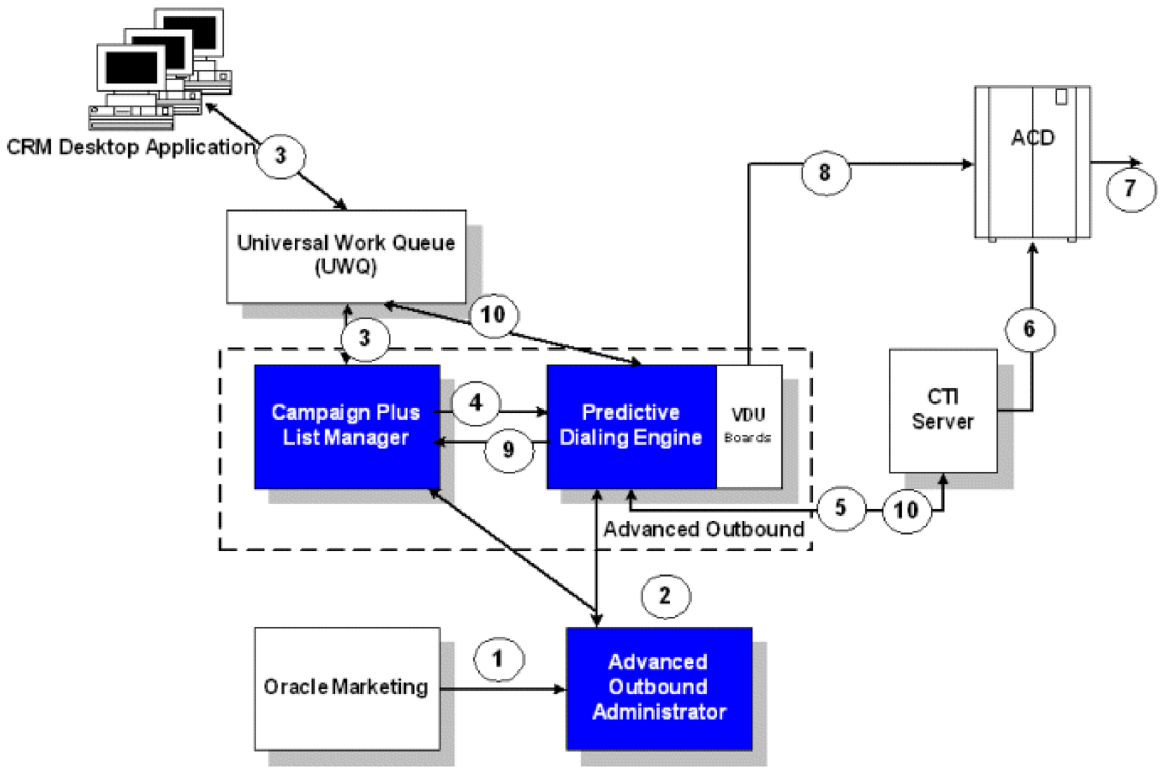
About Security Group ID

Security Group ID is a column added to all tables for Campaign Plus. It supports application hosting; however, it is not currently being utilized.

Advanced Outbound Business Flow



Advanced Outbound Transaction Flow



Call Flow

1. Oracle Marketing identifies the campaigns and customers to be contacted through the call center channel.
2. Advanced Outbound administrator will create the campaigns and import the list to be dialed.
3. CRM desktop application initiates outbound call request to list manager via UWQ.
4. List manager sends (call record) numbers to be dialed to predictive dialer service.
5. Predictive utilizes the CTI server to dial number.

6. CTI server initiates the dialing w/ ACD.
7. ACD sends dial to public switch network.
8. Predictive's VDU boards "listens" to call progress of call made.
9. If call is not a live connect, then Predictive sends record back to list manager to be recycled.
10. If a live connect, Predictive initiates a phone transfer to available agent station (via CTI server path) and send data for screen pop to CRM desktop application via UWQ.

Implementing Oracle Campaign Plus

This topic group provides general descriptions of the setup and configuration tasks required to implement the application successfully.

This topic group covers the following topics:

Configuration Overview

Configuration is the final step in the Campaign Plus installation process. You typically perform configuration tasks after you install the software and you've restarted the server or workstation. Normally, you perform these tasks once during the initial installation. If names of services or databases ever change, then you may have to perform the configuration tasks again so Campaign Plus can use the new names.

What are Configuration Worksheets?

Configuration worksheets help you to gather the configuration information required to configure Oracle Campaign Plus for use. You must enter all of the information requested in the worksheet.

Worksheet for Oracle Integrated Manager Configuration

Please complete the following:

- Identify the data source name and logon parameters for the Oracle ODBC database:

   – Data source name: ____
   – Database user ID: ____
   – Database password: ____

- Identify the Service Monitor name (POM server name): This should be the default name: CampaignPlusMonitor.

  If you changed this name during installation of Oracle Call Center Services, then use the name that you assigned: ____
  __

Configuration Tasks

Use this procedure to configure Oracle Campaign Plus.

Prerequisites

Configuration of Oracle Campaign Plus is performed in Oracle Integrated Manager.

Steps

1. From your desktop, click **Start**, then select **Programs**, **Oracle**, **Integrated Manager**, and **Registry Configuration Console**.

   The Registry Configuration Console appears.

2. In the System Database Information area, specify the data source name, user ID, and password for the Oracle CRM system database. If no datasource names appear in the list, you must have your system administrator create one.
3. Select the Service Monitor (POM) Server Name to be used for Campaign Plus.
4. Click **Apply**, and then quit the Registry Configuration Console.
5. From the Windows Start menu, select the **Administrator MMC Console for Oracle Integrated Manager**.

   Oracle Integrated Manager appears on your screen.

6. From the Integrated Manager tree view, expand the **Integrated Manager** node, then expand the **Services Configuration** node, then expand the **Microsoft Windows Network** node.
7. From the list of machines, find the server on which you installed the services. Expand the machine's node until you find the **Service Monitor**.

8. Right-click **Service Monitor**, and select **Properties**.
9. In the General tab, type `CampaignPlusMonitor` in the Service name box. If this default name was changed during installation of the Oracle Call Center Services, then type the new name in the Service name box. Click **Apply**.
10. On the DCE Logon tab, enter the DCE principal and password and click **Apply**.
11. On the Log File Dir tab, click **Browse** to locate the ServiceMonitorLogs file directory. Click **OK**, then click **Apply**.
12. On the Servers tab, verify that the Campaign Plus server name is listed. If no Campaign Plus servers are listed, you must create one. To do so:
    - From the navigation tree, click **Server Monitor**.
    - Open it to see **Servers Being Monitored**.
    - Right-click **Servers Being Monitored**, then click **New**, and **Service Monitor Server**.
    - Click **Browse**.
    - Select the desired server and click **OK**.
    - Click **Add Server** and repeat steps 8 and 12.
13. Click **OK** and quit Integrated Manager.
14. From the Integrated Manager tree view, expand the **Integrated Manager** node, then expand the **Services Configuration** node, then expand the **Microsoft Windows Network** node.
15. From the list of machines, find the server on which you installed the services. Expand the machine's node until you find the **Campaign Plus Services**.
16. Right-click **Campaign Plus Services**, then select **Properties**.

    The Campaign Plus Service Configuration Properties box appears, displaying nine tabs. You must configure each of these tabs.

    Note: You must click **Apply** on each tab, before moving on to another tab.

    ---

17. On the General tab screen, ensure the active flag check box is unchecked and set the Start Time to read 7:45 AM.

The Active flag check box will be unchecked by default and can be checked and unchecked.

The clock can be set to various times and the **APPLY** button will become enabled. You can change the time by typing a number in the Start Time field or by using the up and down arrow keys on the right in the Start Time field. The hour must be a number between 1 and 12, and the minutes must be between 0 and 59.

18. Click **Apply**.
19. Click the DCE Logon tab.

    The DCE Logon tab screen appears.

20. On the DCE Logon tab, type the cell principal name and password in the provided fields.

    The cell principal name is usually cell_admin.

    You must know what the cell password is for the particular PCDCE32 cell you are on.

21. Click **Apply**.
22. Click the Database Logon tab.

    The Database Logon tab screen appears.

23. On the Database Logon tab, select the system database name from the list of available ODBC system DSNs displayed in the System database drop down list and type the database user password into the Database password field.

    This DSN must map to the system database that the Campaign Plus scheme is on. The display field of the System database drop down box will populate with the selected DSN. The DSNs available for selection will be those located on the Campaign Plus server machine.

24. Click **Apply**.
25. Click the EXE Path tab.

    The EXE Path tab screen appears.

26. On the EXE Path tab, click the **BROWSE** button to select the path and the executable name used by Campaign Plus.

    The Browse for Folder screen appears.

27. Expand the folder CampaignPlusBin and highlight CampaignPlus.exe. Click **OK**.

    The Executable field is populated with the value D:\Oracle\OracleCampaignPlus\bin\campaignplus.exe.

28. Click **Apply**.

29. Click the Log Files tab.

    The Log Files tab screen appears.

30. On the Log Files tab, click Browse to select the path of the log files to be used by Campaign Plus and highlight CampaignPlusLogs. Click **OK**.

    The Local directory field is populated with the value D:\Oracle\OracleCampaignPlus\logs and the Network directory field is populated with \\Qasrv1\CampaignPlusLogs.

31. Click **Apply**.

32. Click the Calendar Files tab.

    The Calendar Files tab screen appears.

33. On the Calendar Files tab,

34.

References

Configuration Overview

Configuration Worksheets

Setting Filters for Logs

The filters determine how and when alert messages are tracked and logged for all services and servers. Use this procedure to set the logging filters.

Prerequisites

A service must have been created and exists for Campaign Plus in Oracle Integrated Manager.

Steps

1. From the Oracle Integrated Manager navigation tree, double-click **Outbound**.

2. Double-click **Campaign Plus Services**.
3. Click the appropriate service.
4. Right-click **Log and Alerts**.
5. Select **All Tasks**.
6. Select **Set Filter**.

   The Set Filters for Log / Alerts screen will display. The Set Filters for Log / Alerts screen consists of two types of filter settings: Time Filters and Other Filters.

Note: Log filters apply to all services.

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7. In the Time Filter box, enter the parameters as you want them to apply to the service. You can use the time filters to identify how you want to query the results of the logging activity.
8. If you do not want to set the filtering of logs by time, select the **No Time Filter** option.
9. If you want logs to be shown for a set number of hours, select the **Show Log/Alerts for Last Hours** option.

   Select the value from the LOV. You may choose any number of hours between 1 and 24. Beginning with 24 hours, the setting is incremental by 24, up to 72 hours. The default is 24.

   Or, if you choose, you can enter the desired number of hours in the **Show Log/Alerts for Last Hours** field.
10. If you want to filter by a date range and time, select the Show Log / Alerts from and To option.

    Enter the date from which to begin or select the date from the LOV. When you select the LOV, the calendar feature will display for data selection.

    Enter the time from which to begin showing logs or select the time. Click the hour and choose the up or down arrows in the field to increase or decrease the time by 1 hour. When you click the minute or second values, you can increase or decrease each by 1 minute or second respectively.
11. In the Other Filters box, enter the parameters as they apply to the filters being defined.
12. You can determine the severity level to be used as a filter. There are 5 levels:

- informational
- trace
- minor
- major
- critical

If you want to filter logs and alerts by severity level, select the Show Log / Alerts with severity level greater than option. Next, select a level from the LOV.

13. You can also filter logs and alerts based on action ID. When the action ID is equal to the selected action, the alert will display and be logged. The filter options are:
    - log
    - set alert
    - clear alert
    - clear all
14. If you want to set the filters by action ID, select the Show Log / Alerts with action ID equals to option. Next, select the action from the LOV.
15. The Show Max option is a required field with a default setting of 100. You can modify the number as required. You may enter any number of records from 1 to 1000.
16. Click **OK**.

References

Configuration Overview

Configuration Tasks

Activating Alerts

Activating Alerts

Alert messages for all services are controlled from the Logs and Alerts node in Oracle Integrated Manager. When you activate alert messages, alerts will be monitored and captured for all services. Each alert message will display in a separate window. You also can stop the alerting feature through the Logs and Alerts node. Use this procedure to activate alert messages for all services.

Prerequisites

A service must have been created and exists for Campaign Plus in Oracle Integrated Manager.

Steps

1. From the Oracle Integrated Manager navigation tree, double-click **Outbound**.
2. Double-click **Campaign Plus Services**.
3. Click the appropriate service.
4. Right-click **Log and Alerts**.
5. Select **All Tasks**.
6. Select **View Alerts**.

Note: When you enable the viewing of alerts, as alert messages are generated, they will display in a separate window for viewing.

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7. Click **OK**.

References

Configuration Overview

Configuration Tasks

Setting Filters for Logs

Administering Oracle Campaign Plus

This topic group provides task-based procedures for required for ongoing system maintenance and includes information on administration tools and utilities.

This topic group covers the following topics:

Creating a Campaign Plus Service

Oracle Campaign Plus is a module of Oracle Integrated Manager. You must have Integrated Manager installed and operating to use Campaign Plus. For installation of Integrated Manager, refer to the *Campaign Plus Installation* documentation.

The Campaign Plus Wizard guides you through the steps needed to create a Campaign Plus service, including the creation of lists and campaigns. You can change or expand the service later by changing its properties and adding new lists and campaigns.

If you are installing Campaign Plus for the first time, then you need to create a service from scratch. If you already have Campaign Plus services, then you can copy one of the existing services to create a new service. You need to change its properties to match your requirements.

View one of the following for detailed steps:

Creating a Campaign Plus Service From Scratch

Creating a Campaign Plus Service From Oracle Marketing

Creating a Campaign Plus Service by Copying an Existing Service

Creating a Campaign Plus Service From Scratch

Use this procedure to create a Campaign Plus service from scratch.

Prerequisites

You need the following information to complete the Campaign Plus Wizard:

- Service Location name of the host machine where the service is located
- Default start time and days of operation
- Dialing method - predictive, preview, timed preview, or progressive
- If predictive dialing: predictive server name, and the no answer ring count
- Time zone in which the server is located
- Calendar file and recycling file to be used
- Campaign database (Data Source Name) name, user ID, and password
- Selection criteria if desired
- Release criteria if desired

Steps

1. From the Integrated Manager console tree, right-click the **Campaign Plus Services** node.
2. From the popup menu, select **New**, then **Campaign Plus Service**. Click **Next** to start creating a new service.
3. Type a new name for the service.
   - The name must be exactly six characters long and start with a letter. Use only upper case letters A-Z, 0-9, and underscore.

4. Select the Service Location from the drop-down list. Click **Next**.
   - The Service Location is the host computer where this service is located.
5. Select **I want to create a new service from scratch**, then click **Next**.
6. Select the time of day that you want the service to start calling.
7. Select the days of the week on which you want the service to be started.

   The service will only start on the days of the week you check.
8. Select the check box to make the service active. Click **Next**.
   - If you leave this box unchecked now, you can activate the service later.
9. Select a dialing method from the drop down list. See Dialing Methods.
10. If you choose **Predictive**, click **Predictive Dialing Parameters**. If you select **Preview**, **Progressive**, or **Timed Preview**, click **Next**.

    a. From the Set Dialing Parameters dialog box, select the name of the Predictive Server from the list.

    b. Select the no answer ring count. This is the number of rings allowed until the record is given a no answer status.

    c. Check Enable Call Progress Detection to activate the checkboxes for answering machine and SIT detection.

    d. Check Enable Answering Machine Detection and select the Answering Machine Strategy from the drop down list. (If you select **Play Message**, choose the desired message from the drop down list in the Message field).

    e. Check Enable SIT Detection and select the Reorder, Vacant, Intercept and Busy strategy from the drop down list in the corresponding field.

    f. Click **OK** to return to the wizard, and click **Next** to continue.
11. Select the time zone where the Campaign Plus server is located.
12. Select the Calendar File to be used.
    - The calendar file defines when a list is open or closed. When a list is open, customer records can be released. When a list is closed, customer records cannot be released.
13. Select the Recycling File.
    - The recycling you select determines when and how to recycle a customer record after a call has been attempted.

14. Select the Data Source Name (DSN) from the available campaign database names.
15. Type your database user ID and password. Confirm your password then click **Next**.
16. From the Available Fields list, select the Name Fields in the order to be displayed to the agent during the screen pop.
17. From the Available Fields list, select the Data Fields to be copied to the list record during a list load. Click **Next**.
    - Data fields are used in release control, selection criteria, list release, sorts, and recycling scripts. `CUST_ID`, `TELE_NBR`, and `TIME_ZONE` are default fields.
18. Click **Wizard** to specify selection criteria.
19. From the SQL Wizard, select the Data Field, Operator, and Value. Click **OK** to return to the wizard.
20. Select the Reorganization Recheck check box if you would like Campaign Plus to check files for errors, optimize files, and reset list quotas. Click **Next**.
21. Click **Release Criteria Wizard** to specify record release criteria.
22. From the wizard, select the Name/Data Field, Operator, and Value. Click **OK** to return to the wizard. Click **Next**.
23. Review the Summary to verify your Campaign Plus Service selections. Use **Back** to make any changes. Click **Finish** to create the service.
24. Click **Yes** to create the Campaign Plus Service.

References:

Setting Call Progress Detection

Creating a Campaign Plus Service by Copying an Existing Service

Activating and Inactivating a Campaign Plus Service

Creating a Campaign Plus Service From Oracle Marketing

Use this procedure to create a Campaign Plus service from Oracle Marketing.

Prerequisites

None

Steps

1. From the Integrated Manager console tree, right-click the **Oracle Marketing Campaigns** node.
2. Right-click the desired Oracle Marketing Campaign.
3. From the popup menu, select **All Tasks**, then **Create Campaign Plus**. Click **Next** to start creating a new service.
4. Type a new name for the service. The name must be exactly six characters long and start with a letter. Use only upper case letters A-Z, 0-9 and underscore.
5. Select the Service Location from the drop-down list, and click **Next.**

   The Service Location is the host computer where this service is located.
6. Select the time of day that you want the service to start calling.
7. Select the days of the week on which you want the service to be started.

   It will start only on the days of the week you check.
8. Select the check box to make the service active, and click **Next**.

   If you leave this box unchecked now, you can activate the service later.
9. Select a dialing method from the drop down list. See Dialing Methods.
10. If you choose **Predictive**, click **Predictive Dialing Parameters**. If you select **Preview**, **Progressive**, or **Timed Preview**, click **Next**.

    a. From the Set Dialing Parameters dialog box, select the name of the Predictive Server from the list.

    b. Select the No Answer Ring Count. This is the number of rings allowed until the record is given a No Answer status.

    c. Check Enable Call Progress Detection to activate the checkboxes for answering machine and SIT detection.

    d. Check Enable Answering Machine Detection and select the Answering Machine Strategy from the drop down list (If you select **Play Message**, choose the desired message from the drop down list in the Message field).

e. Check Enable SIT Detection and select the Reorder, Vacant, Intercept and Busy strategy from the drop down list in the corresponding field.

f. Click **OK** to return to the wizard. Then click **Next** to continue.

11. Select the time zone where the Campaign Plus server is located.
12. Select the Calendar File to be used. The calendar file defines when a list is open or closed. When a list is open, customer records can be released. When a list is closed, customer records cannot be released.
13. Select the Recycling File. The recycling you select determines when and how to recycle a customer record after a call has been attempted.
14. Select the Data Source Name (DSN) from the available campaign database names.
15. Type your database user ID and password. Confirm your password then click **Next**.
16. From the Available Fields list, select the Name Fields in the order to be displayed to the agent during the screen pop.
17. From the Available Fields list, select the Data Fields to be copied to the list record during a list load. Data fields are used in release control, selection criteria, list release, sorts, and recycling scripts. `CUST_ID`, `TELE_NBR`, and `TIME_ZONE` are default fields. Click **Next**.
18. Click **Wizard** to specify selection criteria.
19. From the SQL Wizard, select the Data Field, Operator, and Value. Click **OK** to return to the wizard.
20. Select the Reorganization Recheck check box if you would like Campaign Plus to check files for errors, optimize files, and reset list quotas. Click **Next**.
21. Click **Release Criteria Wizard** to specify record release criteria.
22. From the wizard, select the Name/Data Field, Operator, and Value. Click **OK** to return to the wizard. Click **Next**.
23. Review the Summary to verify your Campaign Plus Service selections. Use **Back** to make any changes. Click **Finish** to create the service.
24. Click **Yes** to create the Campaign Plus Service.

References:

Setting Call Progress Detection

Creating a Campaign Plus Service by Copying an Existing Service

Use this procedure to create a Campaign Plus service by copying an existing service.

Prerequisites

You need the following information to complete the Campaign Plus Wizard:

- Service Location name of the host machine where the service will be located.
- Default start time and days of operation.
- Dialing method - predictive, preview, timed preview, or progressive.
- If predictive dialing: predictive server name, and the no answer ring count.
- Time zone in which the server is located.
- Calendar file and recycling file to be used.
- Campaign database (Data Source Name) name, user ID, and password.
- Selection criteria if desired.
- Release criteria if desired.

Steps

1. From IM console tree, right-click the **Campaign Plus Services** node.
2. From the popup menu, select **New**, then **Campaign Plus Service**.
3. Click **Next** to start creating a new service.
4. Type a new name for the service. The name must be exactly six characters long. Use only upper case letters A-Z, 0-9, and underscore.
5. Select the Service Location from the drop-down list. The Service Location is the host machine where this service should be located.
6. Click **I want to create a new service by copying this service**.
7. Select the service you want to copy from the drop down list, and click **Finish**.
8. Click **Yes** to create the Campaign Plus Service.
9. If you want to create a new list, click **Yes** and follow the steps listed under the Creating a List topic.

References

Creating a Campaign Plus Service From Scratch

Setting Call Progress Detection

Activating and Inactivating a Campaign Plus Service

Viewing Campaign Plus Summary Information

Summary information about the configuration and operation of Campaign Plus services, campaigns, list groups, and lists is available anytime.

Use this procedure to view Campaign Plus summary information.

Prerequisites

To view Campaign Plus summary information, a Campaign Plus Service must first be created.

Steps

1. From Integrated Manager console tree, click the **Campaign Plus Service** node. The Campaign Plus Services and summary information appear in the results pane.

2. Use the View menu to change the appearance of the results pane.

3. Refer to the Customizing Summary Information Views topic for detailed steps on selecting the information you want to view.

References

Creating a Campaign Plus Service

Activating and Inactivating a Campaign Plus Service

Customizing Summary Information Views

Activating and Inactivating a Campaign Plus Service

Use this procedure to activate and inactivate a Campaign Plus service.

Prerequisites

Your Campaign Plus Service must be active to be started. The default setting is active when you create a new service. An inactive setting will prevent an automatic startup of the service and may indicate that the last session was improperly shut down.

Steps

1. From Integrated Manager console tree, expand the **Campaign Plus Services** node.

   The Campaign Plus Services appear below.

2. From the list of existing Campaign Plus Services, right-click the service you want to activate.
3. From the popup menu, select **All Tasks**, then **Activate/Inactivate**.
4. Click **Activate** to activate the Campaign Plus Service or click **Inactivate** to inactivate the Campaign Plus Service.

References

Starting and Stopping a Campaign Plus Service

Viewing Properties of a Campaign Plus Service

Customizing Summary Information Views

Starting and Stopping a Campaign Plus Service

Use this procedure to start or stop a Campaign Plus service.

Prerequisites

A Campaign Plus service must be activated before it can be started or stopped.

Steps

1. From Integrated Manager console tree, expand the **Campaign Plus Services** node.
2. The Campaign Plus Services appear below. Right-click the service you want to start.
3. From the popup menu select **All Tasks**, then **Start/Stop**.
4. Click **Start** to start the Campaign Plus Service or click **Stop** to stop the Campaign Plus Service.

References

Creating a Campaign Plus Service

Activating and Inactivating a Campaign Plus Service

Viewing Properties of a Campaign Plus Service

Use this procedure to view the properties of a Campaign Plus service.

Prerequisites

A Campaign Plus Service must exist before you can view its properties.

Steps

1. From Integrated Manager console tree, right-click the **Campaign Plus Services** node that you want to view.
2. Select **All Tasks** then **View Properties**.
3. The Campaign Plus service properties dialog box appears.
4. View the properties for the selected Campaign Plus Service.

References

Creating a Campaign Plus Service

Activating and Inactivating a Campaign Plus Service

Changing Properties of a Campaign Plus Service

Campaign Plus Service Properties

The following table shows all of the properties contained in the Campaign Plus List Manager Properties dialog box.

Tab	Control	Description
General	Name	Name of the campaign.
	Machine Name	Names of the host machines that are recognized as Campaign Plus servers.
	Time Zone	Time zone of the physical location of the host server.

Tab	Control	Description
	Calendar File	File name of the base calendar for this Campaign Plus service.
	Recycling File	File name containing the recycling script that determines when and how customer records are recycled after a call has been attempted.
	Recheck During Reorganization	An automatic process that optimizes the lists associated with a Campaign Plus service
Global Selection	Selection Criteria	The conditions that must be met by a record in the production database for the record to be loaded into any list controlled by the Campaign Plus service.
	SQL Wizard	Opens the wizard used to build SQL statements that define the selection criteria.
Global Release Control	Release Criteria	The conditions that must be met by a record in any list controlled by the Campaign Plus service for the record to be released for outbound calling.
	Wizard	Opens the wizard used to build SQL statements that define the release criteria.
Database Connection	Database	Name of the production database that provides customer information to the Campaign Plus service.
	Login	The login identifier required to access the production database.
Fields	Data Fields	The fields copied from the production database to the Campaign Plus service during a list load.
	Name Fields	The fields in the production database that make up the full name of the customer.
Dialing 1	Dialing Method	The dialing method selected for the Campaign Plus service. ▪ Predictive ▪ Progressive ▪ Preview ▪ Timed preview This dialing method can be overridden by a campaign- or list-level dialing method.

Tab	Control	Description
	Predictive Server	The name of the Predictive server being used.
	No Answer Ring Count	The number of rings before a record is given a No Answer status.
Dialing 2	Call Progress Detection	Enables call progress detection, which determines the outcome of answering machine and SIT contacts.
	Answering Machine Detection	Enables answering machine detection. If enabled, an answering machine is handled as specified in Answering Machine Handling selection.
	Answering Machine Handling	Determines how an answering machine is handled. ▪ Abandon hangs up on the call and drops the record from the list. ▪ Play Message leaves a prerecorded message on the customers answering machine. ▪ Requeue places the record back in the list. ▪ Transfer moves the call to an agent.
	Message	The wave (.wav) file name for the message to be played when an answering machine is detected and Play Message handling is selected.
	SIT Detection	Enables Special Information Tone (SIT) detection. SIT outcomes can be requeued or abandoned.
	Reorder Handling	Defines how a reorder SIT is handled.
	Vacant Handling	Defines how a vacant SIT is handled.
	Intercept Handling	Defines how an intercept SIT is handled.
	Busy Handling	Defines how a busy SIT is handled.

Changing Properties of a Campaign Plus Service

Use this procedure to change the properties of a Campaign Plus service.

Prerequisites

A Campaign Plus Service must exist before you can change its properties.

Steps

1. From Integrated Manager console tree, right-click the **Campaign Plus Services** node that you want to change.
2. Select **All Tasks** then **View Properties**. The Campaign Plus service properties dialog box appears.
3. Change the properties as required.
4. Click **OK** to save the changes.

References

Creating a Campaign Plus Service

Activating and Inactivating a Campaign Plus Service

Viewing Properties of a Campaign Plus Service

Deleting a Campaign Plus Service

Use this procedure to delete a Campaign Plus service.

Prerequisites

Deleting a Campaign Plus service removes all information associated with that service including lists, campaigns, and list groups.

Note: A Campaign Plus service cannot be deleted while it is running. Stop the service first, then delete it.

Steps

1. From the Integrated Manager console tree, click the **Campaign Plus Services** node.
2. The Campaign Plus services appear in the results pane. Right-click the service that you want to delete and select **All Tasks**.
3. Select **Delete *service name***.
4. Click **Yes** to confirm that you want to delete the selected Campaign Plus service.

References

Creating a Campaign Plus Service

Viewing Campaign Plus Summary Information

Viewing Properties of a Campaign Plus Service

Changing Properties of a Campaign Plus Service

Lists

A list is a collection of records that is assembled as part of an outbound campaign. Each record in a list points to a record in the primary database. The Campaign Plus service uses lists to determine which records to give to outbound agents. Normally, a service contains just a few lists. Each list contains customer records with different calling parameters.

View one of the following for more information:

Viewing List Summary Information

Creating a List

Changing List Properties

Reorganizing Lists

Deleting a List

Viewing List Summary Information

Use this procedure to view list summary information.

Prerequisites

Summary information for the lists in a Campaign Plus Service is available from the List node. Summary information consists of the following:

a. Name of the list group.

b. Name of the campaign the list is associated with.

c. Status of the list:

- Open
- Closed

d. Name of the Default Recycle List.

e. Name of the Calendar file.

f. Dialing method of the list group.

g. Total records in the list group.

h. Available and unavailable records in the list group.

i. Records added and removed.

j. Record counts for each hour.

Steps

1. From Integrated Manager console tree, select the **List** node under the Campaign Plus service that you want to view.
2. The List summary information appears in the results pane.
3. Use the view menu to change the appearance of the results pane.
4. Refer to the Customizing Summary Information Views topic for detailed steps on selecting the information you want to view.

References

Creating a List

Changing List Properties

Reorganizing Lists

Deleting a List

Creating a List

You can create a list either when you create the Campaign Plus service or at a later time. You can also create some lists now and add or remove others later.

There are three main ways of creating a list. View one of the following for more information:

Creating a List From the Create List Wizard

To create a list when creating the Campaign Plus service, use the Create List Wizard. When creating lists at a later time, you can either build one from scratch or copy an existing list as a template.

Creating a List From Scratch

If you need to create a completely new list unlike any of your existing lists, create the list from scratch.

Creating a List by Copying an Existing List

If you are creating a list that is similar to an existing list, you can save time by using the existing list as a template and changing only those properties that are different.

Creating a List From the Create List Wizard

Use this procedure to create a list by using the Create List Wizard.

Prerequisites

An active Campaign Plus Service must exist before you can create a list.

Steps

1. Click **I want to create a list from scratch** to create a new list, then click **Next**.
2. Type a descriptive name for the list.
3. Select the dialing method for this list from the drop-down list. See Dialing Methods.
4. Click **Wizard** to specify selection criteria. From the Select Criteria Wizard, select the Data Field, Operator, and Value. Click **OK** to return to the wizard and then click **Next**.
5. Select a Calendar file.

   The calendar defines the days of the week and hours of the day that records in the list can be called. It also defines the time zone of the list.
6. Select a Recycling list.

   The recycling list defines how customers will be called back at a later time.
7. Click **Release Strategy** and select the conditions under which records are to be released. The current release strategy is shown to the right of the button.
8. Select a release strategy, then click **OK** to continue.
9. Select the time-based list check box if this is to be a time-based list. If you want the time stamp honored then select the Timestamp check box.

10. If you want this list to be available at exhaustion, then select **This list is available when all other lists are exhausted**. Click **Next**.
11. Enter the Selection Priority from 1 to 100. Do not use zero.
12. Enter the Release Priority from 1 to 100. Do not use zero.

    The release priority sets the relative priority of this list compared to others in the list manager.
13. Select the Sort List check box if you want to sort the fields in the list. Use **<** and **>** to select sort fields. Use **Up** and **Down** to change the order of the selected sort fields. Click **Next** to continue.
14. Click **Wizard** to limit the release of specified records from the list.
    a. Select a Name/Data Field on which you want to set conditions.
    b. Select the operator for the condition.
    c. Type the value of the condition.
    d. Use **AND** or **OR** to set additional condition. Use the parenthesis buttons to set nested conditions.
    e. Click **OK** to return to the List wizard.
15. Select the Limit Release check box to enable the limit criteria you defined. Click **Next**.
16. Review the List Summary to verify your list selections. Use **Back** to make any changes. Click **Next** to confirm your selections.
17. From the confirmation dialog box, click **Yes** to create the List.
18. Click **New** to create another list, otherwise click **Finish**.
19. If you want to create a campaign, click **Yes** and follow the steps in the Creating a Campaign topic.

References

Viewing List Summary Information

Changing List Properties

Reorganizing Lists

Deleting a List

Creating a List From Scratch

Use this procedure to create a list from scratch.

Prerequisites

An active Campaign Plus Service must exist before you can create a list.

Steps

1. From Integrated Manager console tree, right-click the **Lists** node of the Campaign Plus service for which you want to create a new list.
2. From the popup menu select **New**, then **Campaign Plus List**.
3. Click **I want to create a new service from scratch**. Click **Next**.
4. Type a descriptive name for the list.
5. Select a dialing method from the drop-down list. See Dialing Methods.
6. Click **Wizard** to specify selection criteria.
7. From the Select Criteria Wizard, select the Data Field, Operator, and Value. Click **OK** to return to the wizard and then click **Next**.
8. Select a Calendar file. The calendar defines the days of the week and hours of the day that records in the list can be called. It also defines the time zone of the list.
9. Select a Recycling list. The recycling list define how customers will be called back at a later time.
10. Click **Release Strategy** and select the conditions under which records are to be released. The current release strategy is shown to the right of the button.
11. Select a release strategy, then click **OK** to continue.
12. Select the time-based list check box if this is to be a time-based list. If you want the time stamp honored select the Timestamp check box.
13. Select the **This list is available** check box if you want this list to be available at exhaustion.
14. Enter the Selection Priority from 1 to 100. Do not use zero.
15. Enter the Release Priority from 1 to 100. Do not use zero. The release priority sets the relative priority of this list compared to others in the list manager.

16. Select the Sort List check box if you want to sort the fields in the list. Use **<** and **>** to select sort fields. Use **Up** and **Down** to change the order of the **selected** sort fields. Click **Next** to continue.
17. Click **Wizard** if you want to limit the release of certain records from the list.
    a. Select a Name/Data Field on which you want to set conditions.
    b. Select the operator for the condition.
    c. Type the value of the condition.
    d. Use **AND** or **OR** to set additional condition. Use the parenthesis buttons to set nested conditions.
    e. Click **OK** to return to the List wizard.
18. Select the Limit Release check box to enable the limit criteria you defined. Click **Next**.
19. Review the List Summary to verify your list selection. Use **Back** to make any changes. Click **Next** to create the list.

References

Viewing List Summary Information

Changing List Properties

Reorganizing Lists

Deleting a List

Creating a List by Copying an Existing List

Use this procedure to create a list by copying an existing list.

Prerequisites

An active Campaign Plus Service must exist, and a list must already exist before you can create a list by copying an existing one.

Steps

1. From Integrated Manager console tree, right-click the **Lists** node of the Campaign Plus service for which you want to create a new list.
2. From the popup menu select **New**, then **Campaign Plus List**.

3. Click **I want to copy a list from the following Campaign Plus service**.
4. Select the Campaign Plus service that contains the list you want to copy. Click **Next**.
5. The available lists appear in the table. The Target List Name column shows the new name of a list you create. The Source List Name column shows the existing name of the list you can copy. The Status column shows any naming conflicts that may exist with the Target List Name.
   * **Ok** means the Target List Name can be used.
   * **Duplicate Name** means the Target List Name already exits in the Campaign Plus service. You must rename the list.
6. To select a list, click the check box next to the Target List Name. If you are unable to place a check mark in the box, look at the Status column. You may have to change the list name.
7. To change a Target List Name, click the name to highlight it. Click the name again and type a new name for the list. Then place a check in the check box.
8. After you have selected all the lists you want to copy, click **Next**.
9. Click **Yes** to create the lists.
10. If want to use the lists exactly as you copied them, click **Finish**. Otherwise, select a list to customize and click **Edit**.
11. Customize the List Properties as needed by following the steps in the Changing List Properties topic.

References:

Viewing List Summary Information

Changing List Properties

Reorganizing Lists

Deleting a List

Changing List Properties

Use this procedure to change list properties for a Campaign Plus list.

You can change list properties in the Campaign Plus List Properties dialog box. There are three tabs to view or change properties (You can change a specific property by going directly to the appropriate tab):

Tab Name	Description
General	Shows the primary list properties
Selection	Shows the selection criteria and priority
Release	Shows the release criteria and priority

Prerequisites

An active Campaign Plus Service must exist, and a list must already exist before you can change the list properties.

Steps

1. From Integrated Manager console tree, select the **Lists** node under the Campaign Plus service that you want to change.
2. The Lists appear in the results pane. Right-click the list you want to change and select **All Tasks** then **View Properties**.
3. The General tab shows the List Name. You can change the following properties:
   a. **Calendar** file defines when a list is open or closed. When a list is open, customer records can be released. When a list is closed, customer records cannot be released.
   b. **Dialing Method** See Dialing Method.
   c. **List Group** the name of the list group for which this list is a member.
   d. **Default Recycle List** is the name of the list that is to be used as the default recycling list for noncontact customers. If you leave this blank, the recycling algorithm specifies a list name. If the algorithm does not specify a list name, it automatically places a recycled record in the current list.
   e. **Campaign** is the campaign for which this list should be a member.
   f. **Sort Fields** is a list of fields indicating the sort order for records in the list. When the time-based flags are checked on, lists are automatically sorted by date and time. The fields that the list can be sorted on must be derived from the list data or name fields. It can include any of the three default fields: ID,

telephone number, and time zone, which are automatically defined for ALL services.

4. The Selection tab shows the Selection Criteria and the Selection Priority.
   a. Click **Wizard** to change the Selection Criteria.
   b. Type a new priority for the list in the Selection Priority box.
5. The Release tab allows you to change the Release Strategy and shows the current Release Criteria.
   a. Click **Release Strategy** to select a new strategy.
   b. Click **Wizard** to change the Release Criteria if desired.
   c. Type a new priority for the list in the Release Priority box. This number indicates the list's relative priority for records released by Campaign Plus. Campaign Plus ignores lists with low priorities until it has exhausted all Available Records in the High Priority lists. Lists with equal priorities are accessed in a round-robin manner, with Campaign Plus using the list Quantum values to determine the number of records to access from each list before moving to the next list.
      * 1 to 50 is considered high priority.
      * 51 to 100 is considered low priority.
   d. Select the Exhaustion Availability check box to allow Campaign Plus to obtain records from this list if there are no available records in the other lists that meet the conditions of the ID request. It ignores any time-stamps on records in the list, but does not ignore the scheduled open and close times defined by the list's schedule.
6. Click **OK** to save the changes.

References

Viewing List Summary Information

Creating a List

Reorganizing Lists

Deleting a List

Reorganizing Lists

Reorganization is an automatic process that optimizes the lists associated with a Campaign Plus service. You can have Campaign Plus do this automatically when it does a shut down according to its calendar.

Reorganization of the lists accomplishes the following:

- Ensures all information is stored on the hard disk
- Eliminates wasted space
- Optimizes the service's database so it is more efficient
- Rewrites the service's database
- Creates a new backup file
- Eliminates duplicate IDs.

Prerequisites

A Campaign Plus Service must be started and active, and more than one list must exist before you can reorganize lists.

Steps

1. From Integrated Manager console tree, click the **Campaign Plus Services** node.
2. The Campaign Plus services appear in the results pane. Right-click the service you want to reorganize.
3. From the popup menu select **All Tasks**, then **Reorganize**.
4. From the confirmation box, click **Yes** to have the records rechecked.

References

Viewing List Summary Information

Creating a List

Changing List Properties

Deleting a List

Deleting a List

Use this procedure to delete a Campaign Plus list.

Prerequisites

An active Campaign Plus Service must exist, and a list must already exist before you can delete a list.

Steps

1. From Integrated Manager console tree, click the **Lists** node that contains the list you want to delete.
2. The Lists appear in the results pane. Right-click the list you want to delete. Select **All Tasks** and then **Delete *list name***.
3. Click **Yes** to confirm that you want to delete the selected list.

References

Viewing List Summary Information

Creating a List

Changing List Properties

Reorganizing Lists

Loading Records Into a Campaign Plus Service

Campaign Plus allows you to easily copy data from the customer database into lists. The customer account number, telephone number, and time zone are automatically copied when you load records. When other fields are defined as part of the list record Campaign Plus copies those too.

You can load records from either the Oracle Campaign database or from a flat transaction file.

Prerequisites

You must specify the campaign, list group, or service where you want to load records. Campaign Plus uses the selection criteria defined in the service to place the records into the specified lists.

The Campaign Plus service must be running to load records.

Steps

1. From Integrated Manager console tree, right-click the desired **Campaign Plus Services** node.

2. From the popup menu, select **All Tasks**, then **Load Records**.
3. From the Load Records dialog box, select the name of the source database that will supply customer information to the Campaign Plus list.
4. Type your database login and password.
5. To specify a database table name other than the default name, click **Advance** and enter the name.
6. Click **Load** to start loading records.

References

Creating a Campaign Plus Service

Activating and Inactivating a Campaign Plus Service

Creating a Campaign

Exporting IDs

You can copy all the list records from a specified list, campaign, or list group into a transaction file so that they can be loaded into another list database. You can choose whether to delete the exported records or leave them in the original list.

Prerequisites

An active Campaign Plus campaign, list, or list group must exist before you can export records.

Steps

1. From Integrated Manager console tree, right-click the desired **Campaign Plus Services**, **Campaign, List**, or **List Group** node.
2. From the popup menu select **All Tasks**, then **Export IDs**.
3. From the Export IDs dialog box, type the full path and file name that you want to hold the exported IDs.
4. Select the **Delete exported IDs** check box if you want the IDs deleted from the list or list group after export.
5. Click **Export IDs**.

References

Creating a Campaign Plus Service

Activating and Inactivating a Campaign Plus Service

Creating a Campaign

Executing a Transaction File

A transaction file is a tab-delimited ASCII file containing a header line and one line for each record that is added to the list server's database. You can instruct a Campaign Plus service to open a file and execute the transactions it contains. Executing transaction files is often use to load records into lists associated with a Campaign Plus service or a campaign.

Prerequisites

An active Campaign Plus Service, campaign and lists must exist before you can execute transaction files.

Steps

1. From Integrated Manager console tree, right-click the desired **Campaign Plus Services** node.
2. From the popup menu select **All Tasks**, then **Execute Transaction File**.
3. From the Execute Transaction File dialog box, type the full path and name of the transaction file you want to execute.
4. Enter a transactions identifier (optional).
5. Click **Execute File**.

References

Creating a Campaign Plus Service

Activating and Inactivating a Campaign Plus Service

Creating a Campaign

What is a Campaign?

A campaign consists of all the lists that reference customers being called for a particular outbound objective. A Campaign Plus service may have many campaigns running at the same time, although it is recommended that one campaign be created per Campaign Plus service.

View one of the following for detailed steps:

Viewing Campaign Summary Information

Creating a Campaign

Adding and Removing Lists from a Campaign

Deleting a Campaign

Viewing Campaign Summary Information

Use this procedure to view campaign summary information.

Prerequisites

An active Campaign Plus Service must first exist, since all Campaigns are associated with a Campaign Plus service.

Steps

1. From Integrated Manager console tree, click the **Campaign Plus Services** node that contains the Campaigns you want to view.
2. The campaign summary information appears in the results pane.
3. Use the View menu to change the appearance of the results pane.
4. Refer to the Customizing Summary Information Views topic for detailed steps on selecting the information you want to view.

References

Creating a Campaign

Adding and Removing Lists from a Campaign

Deleting a Campaign

When can I Create a Campaign?

Campaigns can be created either when you create the Campaign Plus Service or a later time. You also can create a campaign at the same time as you create the Campaign Plus Service and add more campaigns later.

View one of the following for detailed steps:

Creating a Campaign with the Campaign Plus Wizard

Creating a Campaign with Integrated Manager

Creating a Campaign with the Campaign Plus Wizard

Use this procedure to create a campaign with the Campaign Plus Wizard.

Prerequisites

Use the Campaign Plus wizard to create a campaign when creating a Campaign Plus Service.

Steps

1. Select **Create new campaign** and enter a descriptive name for the campaign.
2. Select the campaign dialing method for this campaign from the drop-down list. See Dialing Methods.
3. Select the lists you want to assign to this campaign. Click a list from the Available List column and use the right arrow to move it to the Assigned List column. Repeat for additional lists. Click **Next** to continue.
4. Review the summary page. Use **Back** to change your selections or click **Finish** to confirm you selections.
5. From the confirmation dialog box, click **Yes** to create the new campaign. Campaign Plus then confirms that the new campaign has been created.

References

Viewing Campaign Summary Information

Adding and Removing Lists from a Campaign

Deleting a Campaign

Creating a Campaign with Integrated Manager

Use this procedure to create a campaign with Integrated Manager.

Prerequisites

A Campaign Plus Service must exist before you can create a campaign with Integrated Manager.

Steps

1. From the Integrated Manager console tree, right-click the **Campaign** node under the service for which you want to create a new campaign.
2. From the popup menu select **New**, and then select **Campaign Plus Campaign**.
3. Select **Create a new campaign** and enter a descriptive name for the campaign.
4. Select a dialing method for this campaign from the drop-down list. See Dialing Methods.
5. Select the lists you want to assign to this campaign. Click a list from the Available List column and use the right arrow to move it to the Assigned List column. Repeat for as many lists you need. Click **Next** to continue.
6. Review the summary page. Use **Back** to change your selections or click **Finish** to create the campaign.
7. From the confirmation dialog box, click **Yes** to create the new campaign. Campaign Plus then confirms that the new campaign has been created.

References

Viewing Campaign Summary Information

Adding and Removing Lists from a Campaign

Deleting a Campaign

Adding and Removing Lists From a Campaign

Use this procedure to add or remove lists from a Campaign Plus campaign.

Prerequisites

None

Steps

1. From Integrated Manager console tree, expand the **Campaign** node that contains the campaigns you want change. Right-click the desired campaign.

2. Select **All Tasks** and then **View Properties**.
3. Select the List tab.
4. The List tab shows the available lists and the lists currently associated with the campaign. Select the check boxes of the lists you want to include and clear the check boxes of the lists you want to exclude from the campaign.
5. Click **OK** to save the selections.

References

Viewing Campaign Summary Information

Creating a Campaign

Deleting a Campaign

Deleting a Campaign

Use this procedure to delete a Campaign Plus campaign.

Prerequisites

None

Steps

1. From Integrated Manager console tree, click the **Campaigns** node that contains the campaign you want to delete.
2. The campaigns appear in the results pane. Right-click the campaign you want to delete and select **All Tasks** and then **Delete *campaign name***.
3. Click **Yes** to confirm that you want to delete the selected campaign.

References

Viewing Campaign Summary Information

Creating a Campaign

Adding and Removing Lists from a Campaign

Setting Call Progress Detection

Call progress detection determines how Campaign Plus deals with calls that result in answering machine pickups or Special Information Tones (SIT). Campaign Plus, when used with Oracle Predictive, can determine line availability, phone ring, and call completion, by monitoring the call as it progresses through the network. It can then deal with the result as you specify.

When answering machine detection is on, you select the strategy to handle answering machines.

When SIT detection is enabled, you select a strategy to handle each SIT possibility.

Prerequisites

None

Steps

1. From the Integrated Manager console tree, right-click the desired **Campaign Plus Services** node.
2. From the pop-up menu, select **All Tasks**, then **View Properties**.
3. From the Campaign Plus List Manager Properties dialog box, click the Dialing 2 tab.
4. From the Set Dialing Parameters tab, select the Enable Call Progress Detection check box.
5. To set up answering machine detection, click Enable Answering Machine Detection check box.
6. Select an answering machine strategy from the list
   - **Abandon** hangs up the call and drops the record from the list.
   - **Play Message** leaves a prerecorded message on the customer’s answering machine.
   - **Requeue** places the record back in the list.
   - **Transfer** moves the call to an agent.
7. If you select **Play Message**, select the message to be played from the Message list. See the Recording Voice Messages topic for detailed steps on recording the message.

8. To set up Special Information Tone (SIT) detection, select Enable SIT Detection checkbox. There are four SIT possibilities:
   - **Reorder** indicates that the destination cannot be reached because of a temporary problem.
   - **Vacant** indicates that the number dialed is no longer valid and has been disconnected.
   - **Intercept** signals that the number has changed or is no longer in service.
   - **Busy** indicates that all lines in that calling area are busy.
9. Select a handling strategy to deal with each SIT possibility.
   - **Abandon** hangs up on the call and drops the record from the list.
   - **Requeue** places the record back in the list.
10. Click **OK**.

References

Creating a Campaign

Creating a List Group

Changing List Group Properties

Monitoring Operations

You can monitor real-time and historical operations of Campaign Plus in Integrated Manager, including both real-time graphs and service statistics.

View one of the following for detailed steps:

Viewing Real-Time Graphs

Viewing Multiple Graphs

Setting Graphing Properties

Viewing Campaign Plus Log Files

Customizing Summary Information Views

Clearing Statistics in the Summary Information Views

Viewing Real-Time Graphs

Campaign Plus provides a set of graphs that you can use to monitor current activity. You also can customize these graphs to provide only the information you need.

The following graphs are available with all Campaign Plus services:

Graph Name	Description
List hourly calling trends	Displays the number of leads called in each list during each hour of the day
List percentage hourly calling trends	Displays the percentage of leads from each list that have been called during the day
List cumulative hourly calling trends	Displays the cumulative total number of leads called in each list during each hour of the day. This graph shows where Campaign Plus is focusing its calling
Campaign hourly calling trends	Displays the number of leads called in the campaigns during each hour of the day
Campaign percentage hourly calling trends	Displays the percentage of leads from the campaigns that have been called during the day
Campaign cumulative hourly calling trends	Displays the cumulative total number of leads called during each hour of the day
Leads activity in campaigns	Displays the distribution of available, unavailable, and total customer records in the campaigns
Current leads in lists	Displays the number and distribution of leads remaining in the lists

You can view these graphs individually or monitor several at one time within Integrated Manager.

Prerequisites

An active Campaign Plus Service must exist before you can graph it’s activity.

Steps

1. Expand the **Graphs** node under the Campaign Plus service you want to monitor.
2. Select the graph you want to view. The graph appears in the results pane.

References

Viewing Multiple Graphs

Setting Graphing Properties

Viewing Campaign Plus Log Files

Customizing Summary Information Views

Clearing Statistics in the Summary Information Views

Viewing Multiple Graphs

Integrated Manager allows you to open multiple windows at a one time. Use this feature when you want to monitor two or more graphs at the same time.

Prerequisites

An active Campaign Plus Service must exist before you can graph it's activity.

Steps

1. Maximize Integrated Manager to allow the maximum viewing area.
2. Select the **Graphs** node to display the available graphs in the results pane.
3. Right-click the graph you want to view.
4. From the popup menu, select **New window from here**.
5. Adjust the graph window the desired size.
6. Repeat steps 2 through 4 for additional graphs.

References

Viewing Real-Time Graphs

Setting Graphing Properties

Viewing Campaign Plus Log Files

Customizing Summary Information Views

Clearing Statistics in the Summary Information Views

Setting Graphing Properties

Integrated Manager allows you to customize the presentation and configuration of the graphs. Each graph has a properties dialog box from which you can set properties for the graph.

Prerequisites

None

Steps

1. Select the **Graphs** node to display the available graphs in the results pane.
2. Select the graph you want to view.
3. From the scope pane, right-click the desired graph node and select **Properties**.
4. Change graphing properties as desired.

References

Viewing Real-Time Graphs

Viewing Multiple Graphs

Viewing Campaign Plus Log Files

Customizing Summary Information Views

Clearing Statistics in the Summary Information Views

Viewing Campaign Plus Log Files

Campaign Plus maintains journal logs of all its activity. These logs contain a record of all server and database events including hardware failures. You can view any of these files from within Integrated Manager.

Prerequisites

None

Steps

1. Expand the **Log Files** node under the Campaign Plus service that you want to view.

2. Select the desired log file. The SUBMIT_*project*.LOG is the current file. The log file text appears in the results pane.

References

Viewing Real-Time Graphs

Viewing Multiple Graphs

Setting Graphing Properties

Customizing Summary Information Views

Clearing Statistics in the Summary Information Views

Customizing Summary Information Views

Summary information for Campaign Plus services, campaigns, list groups, and lists is displayed in the result pane whenever you select the group node. Customizing the results pane allows you to hide and show different columns. You can choose to view only information that is important to you.

Prerequisites

None

Steps

1. Select the node that contains the summary information you want to customize.
2. In the scope pane, right-click the selected node, and then select **Edit Columns**.
3. From the list in the Edit Columns dialog box, select the columns you want to appear.
4. Clear the check box of the columns you want to hide.
5. Click **OK** to see the new view in the results pane.

The new Summary Information view appears in the results pane.

References

Viewing Real-Time Graphs

Viewing Multiple Graphs

Setting Graphing Properties

Viewing Campaign Plus Log Files

Clearing Statistics in the Summary Information Views

Clearing Statistics in the Summary Information Views

You can clear and reset the statistics shown in all summary information views at any time. Use the Clear Statistics feature to set a new base time for recording Campaign Plus statistical information.

Prerequisites

None

Steps

1. From Integrated Manager console tree, right-click the desired **Campaign Plus Services** node.
2. From the popup menu, select **All Tasks**, then **Clear Statistics**.
3. Click **Yes** to confirm that you want to clear all statistics.

All statistics on the selected Campaign Plus service are cleared.

References

Viewing Real-Time Graphs

Viewing Multiple Graphs

Setting Graphing Properties

Viewing Campaign Plus Log Files

Customizing Summary Information Views

Stopping Alerts

When it is necessary to stop alert messages, you can do so through the Logs and Alerts node in Oracle Integrated Manager. Use this procedure to stop alert messages for all services.

Prerequisites

A service must have been created and exists for Campaign Plus in Oracle Integrated Manager and the View Alerts option from the Logs and Alerts node must have been enabled.

Steps

1. From the Oracle Integrated Manager navigation tree, double-click **Outbound**.
2. Double-click **Campaign Plus Services**.
3. Click the appropriate service.
4. Right-click **Log and Alerts**.
5. Select **All Tasks**.
6. Select **Stop Viewing Alerts**.

Note: Oracle Integrated Manager will stop displaying alert messages for all services.

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7. Click **OK**.

References

Viewing Log and Alert Properties

Viewing Logs and Alerts

Viewing Log and Alert Properties

The database and alert properties can be viewed for services from the Logs and Alerts node in Oracle Integrated Manager. Use this procedure view the log and alert properties.

Prerequisites

A service must have been created and exists for Campaign Plus in Oracle Integrated Manager.

Steps

1. From the Oracle Integrated Manager navigation tree, double-click **Outbound**.

2. Double-click **Campaign Plus Services**.
3. Click the appropriate service.
4. Right-click **Log and Alerts**.
5. Select **All Tasks**.
6. Select **View Properties**.
7. Click **Database** tab.
8. Displays the following database properties.
   - TNS Name
   - Database User
   - Password

Note: All services use the same log and alert database setting. The parameters on the Database tab can only be viewed. They cannot be modified.

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9. Click **OK**.
10. Click **Alerting** tab.
11. The number of seconds by which the system will check for alert messages will display. The default is 5 seconds. You can modify this number if required.
12. The Advanced Queuing box contains the following properties.
    - Queue Name
    - Queue Subscriber
    - Password

References

Stopping Alerts

Viewing Logs and Alerts

Viewing Logs and Alerts

Alerts provide a real-time view of what is occurring in a service. When alerts are set to view, the log and the message details can be viewed. You can view alerts from the Alerts message window or from the Logs and Alerts node in Oracle Integrated Manager.

The alert records and message specifics will display in the Oracle Integrated Manager screen. Use this procedure view logs and alerts.

Prerequisites

A service must have been created and exists for Campaign Plus in Oracle Integrated Manager and alerts must have been logged for the service.

Steps

1. From the Oracle Integrated Manager navigation tree, double-click **Outbound**.
2. Double-click **Campaign Plus Services**.
3. Click the appropriate service.
4. Double-click **Log and Alerts**.
5. Click an alert to view.

   The message details will display in Oracle Integrated Manager for viewing.

   The following information types will display:

   - Title
   - Source
   - Instance
   - IP
   - Host
   - User
   - Time Stamp
   - Severity
   - Action
   - Details

- XML Data
- Record

References

Stopping Alerts

Viewing Log and Alert Properties

Creating a Recycle Strategy

Overview

The recycling algorithm looks at the following information:

- Call outcome
- Number of consecutive events
- Current time
- Total number of call attempts
- Phone type

Each recycle strategy contains the logic that evaluates call outcomes and determines what to do with a customer account based on the call outcome. The call outcome is stored as a call outcome code— a numeric representation of the call outcome.

In order to make it easier to work with recycle files, Oracle has created some standard pre-processed files. These files use preprocessing symbols to take the place of the call outcome codes.

When the preprocessing symbols are translated, they are replaced by the outcome codes. For example, OUTCOME_BUSY is translated to its numeric equivalent (2). The following table shows you the standard outcome preprocessing symbols.

Outcome	Code
Unknown Outcome	0
No Answer	1
Busy	2
Wrong Number	3

Outcome	Code
Not Available	4
Priority Callback	5
Change Number	6
Bypass / Maintenance	7
Deleted	8
Not Set	10
Requeued by *Campaign Plus* because of busy telephone lines (all lines occupied network message)	11
Inbound Contact	13
SIT Busy Tone	30
SIT Operator intercept	31
SIT Reorder (“number has been changed to...”)	32
SIT Disconnect	33
Answering Machine	34
Customer Abandoned (predictive dialing)	35
Modem Tone	36
SIT Tone (general)	37
Fax Tone	38
Withdrawn From Network	40
Withdrawn While Phone Ringing	41
Front Hold Messaging Predictive Hangup	42
Front Hold Messaging Customer Hangup	43
Stop List Failed	44
Contact	128

Campaign Plus interprets outcome codes as follows:

- The acceptable range for outcome code values are from 1 to 200

- Outcome code values from 1 to 60 and from 128 to 180 are restricted -- these codes are reserved for internal used within Campaign Plus and Predictive.
- Campaign Plus treats any outcome >= 100 as a "successful call". Calls with an outcome >= 100 will be counted against a list's quota if the Quota release strategy is being used; calls with an outcome < 100 will not.

New Strategy Questionnaire

Before creating a new recycle strategy, you should determine the following:

1. What is the maximum number of attempts you want before dropping a record? The ch$count variable indicates the total call attempts. The standard recycle algorithm does a DROP from recycling after 8 attempts.
2. There are hard-coded list name assignments in the standard recycle algorithm: Busy, Priority Callback, and Wrong Number. Does your list manager have these lists? If not, change these LIST_ASSIGN statements appropriately.
3. Does this list manager have any special lists that should get customer accounts based on a particular outcome code?
4. Does the number of consecutive times for an outcome matter? If so, use the ch$call_outcome_consecutive variable to see if the customer account has had several attempts resulting in the same outcome each time.
5. Are the outcome keywords spelled correctly? Make sure that the outcome keywords (OUTCOME_BUSY, OUTCOME_ PRIORITY_CALLBACK, etc.) are spelled correctly and are in all UPPERCASE letters. The preprocessor is case-sensitive.
6. Are there any blank lines? Check carefully for blank lines; they are not allowed. If there are any blank lines, remove them.

Recycle Strategy Keywords

The following table displays a list of the recycle strategy keywords.

Action	Syntax	Parameters
Assign date/time for next call	DT_ASSIGN dateTime	Date/time assignment
Assign record to list	LIST_ASSIGN [list]	Name of list

Action	Syntax	Parameters
Change value of record field	FIELD_ASSIGN field value	Field name Field value
Drop the record from the list database	DROP	(None)
Leave the post-processing algorithm	EXIT	(None)
Log Message	LOG message	Message text List name
Modify list score	SCORE list num	Quantity to add to list
Check against boolean logic	IF cond commands [ELSE_IF cond] [commands] [ELSE] [commands] END_IF	Boolean logic string Set of actions
Call next number	NEXT_NUMBER	(None)

Date/Time Keywords

The following table displays a list of the date and time assignment keywords:

Keyword	Meaning
TOMORROW	Same time of day tomorrow, or nearest working date/time to tomorrow as specified by the list manager or list's calendar.
TOMORROW AT hh:mm	Tomorrow at the time specified, or at the nearest working date/time to tomorrow at the time specified as specified by the list manager or list's calendar.
NEXT day_name	Same time on next day of name specified, or nearest working day with that name as specified by the list manager or list's calendar.

Keyword	Meaning
NEXT day_name AT hh:mm	On next day of name specified at the time specified, or on next working date and time with day and time specified as specified by the list manager or list's calendar.
NEXT WEEK	Same time on next day of the week with the same name, or on nearest working date as specified by the list manager or list's calendar.
NEXT WEEK AT hh:mm	At the time specified on the next day of the week with the same name, or on nearest working date and time as specified by the list manager or list's calendar.
n WEEKS	Same time on the same day of the week, n weeks from today, or on nearest working date and time as specified by the list manager or list's calendar.
n WEEK(S) AT hh:mm	At the time specified on the same day of the week, n weeks from today, or on nearest working date and time as specified by the list manager or list's calendar.
n DAYS	Same time, n days from today, or on nearest working date and time as specified by the list manager or list's calendar.
n DAYS AT hh:mm	At the time specified, n days from today, or on nearest working date and time as specified by the list manager or list's calendar. To schedule a call for the current day at a particular time, write "0 DAYS AT hh:mm."
PLUS hh:mm	At the time indicated by adding the hh:mm quantity to the current time, or on nearest working date and time as specified by the list manager or list's calendar.

Creating or Modifying the Recycling Algorithm

You can create a new recycling algorithm or modify an existing one by using Integrated Manager.

To modify an existing algorithm, perform the following steps:

1. Start Integrated Manager's Administrator console and navigate to any Campaign Plus server's node.
2. Open the folder titled 'Recycle Files'. You will find a list of the existing recycling algorithms.
3. Click any of the algorithm names in the scope pane.

The algorithm contents appear in the result pane.

4. You can edit the algorithm contents like a normal file.
5. Once you have completed your edits, right-click the result pane and save the changes.

To create a new algorithm, perform the following steps:

1. Steps 1 & 2 from previous section.
2. Right click the ‘Recycle Files’ node and choose **New**.
3. Give a name to the algorithm and type the contents in the result pane.
4. Save the changes.

Note: Examples of recycling algorithms are included in the installation CD. After installing Advanced Outbound, the examples for recycling can be found in the directory: Oracle\OracleCampaignPlus\recycle.

The content of these examples may be cut/pasted at Step '4' for modifying algorithms, where it can then be further modified as needed.

Note: Sample calendars are also included in the installation CD. After installation, the calendar examples can be found in the following directory: Oracle\OracleCampaignPlus\calendar.

The content of these examples may also be cut/pasted to define the calendars from within Integrated Manager.
