Wave Campaign Tracker Guide

What’s new in this version

REVISED FOR THIS VERSION

- Updated Call Classifier license information in section “Requirements” on page 1-3.
- In section ““Enabling Call Notes pop-ups for ViewPoint users” on page 2-5”, corrected field name in step 4.
- Throughout this guide, cross-references to other manuals now point to WaveHelp topics. To launch WaveHelp, click the Help icon located at the top of the Global Administrator Management Console.

For details on everything that’s new in Wave 4.5, see the *Wave 4.5 Release Notes*.

Introducing the Wave Campaign Tracker

CHAPTER CONTENTS

About Campaign Tracker

Wave Campaign Tracker is a competitive and cost-effective way to track and report on the results of your marketing efforts. You can track the results of a specific campaign or track all campaigns by category, for example all e-mail campaigns, all TV campaigns, and so forth.

If marketing campaigns are a significant budget expense, it's critical to track the ROI on your campaigns to make sure you are maximizing your marketing dollars and effectiveness. With Campaign Tracker, you can replace third-party companies that charge a monthly fee for their services with a solution that you control and that uses the powerful built-in features of Wave.

How to use Campaign Tracker

Campaign Tracker allows tracking of specific campaigns (a print ad, radio spot, or Web advertisement) as well as grouping those campaigns in to categories, for example all television ads, all newspaper ads, Summer Sale, and so forth.

Each campaign has its own DID number to handle incoming calls, and all calls go to the same call center queue. The DID number identifies which marketing campaign the call is in response to, so the agent knows what to say when answering the call, and you can run reports to analyze and compare the effectiveness of specific campaigns or campaign categories.

Features and benefits

- Easy-to-use web-based interface means that campaigns can be developed and run in-house.
- Easy-to-use web-based reporting on campaign results.
- Built on reliable and tested Wave components:
    - **Standard inbound routing** sends DID calls to a **Wave auto attendant** set up to handle calls for a specific campaign.
    - A **Wave Call Classifier** rule is automatically added to the auto attendant when you create a campaign. See "How Campaign Tracker uses Call Classifier rules" on page 4-5 for more about how Campaign Tracker interacts with Call Classifier.
    - Optionally, you can attach a script to each call that will pop up as **ViewPoint Call Notes** attached to the call when the call is answered at the destination extension.
    - Call information saved in the **Wave Call Log** is used to report on campaign results. When you run a report, calls in the Call Log that meet the campaign and report criteria are included in the report.

Installing and Configuring Wave Campaign Tracker

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Campaign Tracker requirements

Make sure that your Wave Server meets the following requirements:

- **Platform requirements:**
  - Wave 4.0 or higher
- **License requirements:**
  - **Campaign Tracker license.**
  - **Call Classifier license.** Campaign Tracker uses Call Classifier to route campaign calls. If you do not have a valid Call Classifier license on the Wave Server, you cannot make new campaign calls, although you can report on previous calls. See "How Campaign Tracker uses Call Classifier rules" on page 4-5.

For details about Wave licensing, launch WaveHelp in the Global Administrator Management Console. Expand the Contents pane and then choose **Entering and Activating Wave Licenses**.

Installing Campaign Tracker

Once your Wave Server meets the requirements listed above, Campaign Tracker will be operational—no additional installation steps are required.

Configuring Campaign Tracker

Configuring Campaign Tracker consists of the following tasks:

- Obtain DID numbers from your service provider.

  DID service provides one or more trunk lines and a range of phone numbers allocated to the trunks. When a call comes in to the Wave Server on one of these trunks, the dialed number identification service (DNIS) is transmitted (typically the last four digits), so that the call can be routed directly to the appropriate Wave extension.

- Create an auto attendant to handle campaign calls.
- Set up inbound routing.
- Optionally, set up Call Notes pop-ups for ViewPoint users.

Obtaining DID numbers

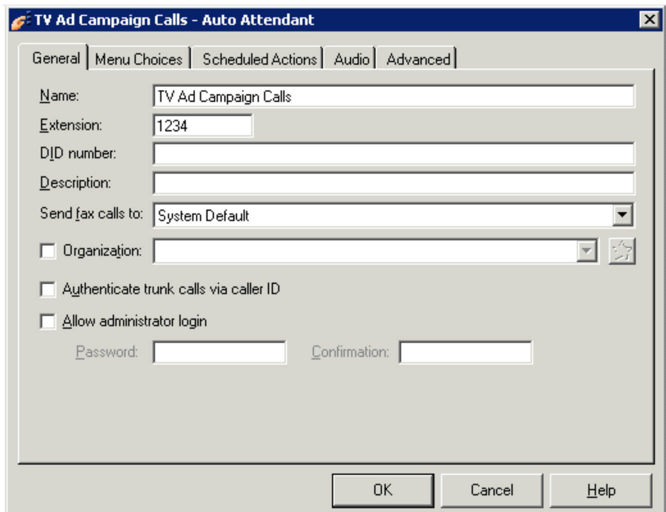
You need a separate DID number for each campaign. You can reuse the same DID number for multiple campaigns, as long as the campaigns' start and end dates do not overlap.

Creating an auto attendant

1. In the Global Administrator Management Console, click **User/Group Management**, located in the PBX Administration section.
2. Click the Auto Attendants icon in the view bar, and then choose **File > New > Auto Attendant**.

3 Enter the following information on the General tab:

- **Name.** Descriptive name for the new auto attendant, for example, “Auto Sales TV Campaign auto attendant”.
- **Extension.** Extension used to access the auto attendant. When customers call in response to this campaign, their calls will be directed to this extension.



Note: Entering a DID number here in the Auto Attendant dialog is not supported in this version. You will associate a DID number with this auto attendant later, as described in “Creating a campaign” on page 4-2.

These are the only required fields—the auto attendant can simply route campaign calls to the correct extension does not have to play a message to the caller or offer any menu choices.

If you configure your auto attendant this way, best practice is to set **Number of seconds before performing ‘nothing’ menu choice** to 0 seconds (This setting is on the Menu Choices tab.)

For details how to create and use auto attendants, launch WaveHelp in the Global Administrator Management Console. Expand the Contents pane and then choose **Configuring Auto Attendants**.

4 Click **OK**.

Setting up inbound routing

The following steps create an inbound routing rule that routes DID calls to the campaign's auto attendant.

1 In the Global Administrator Management Console, click **Trunk Groups**, located in the Trunk Administration section.

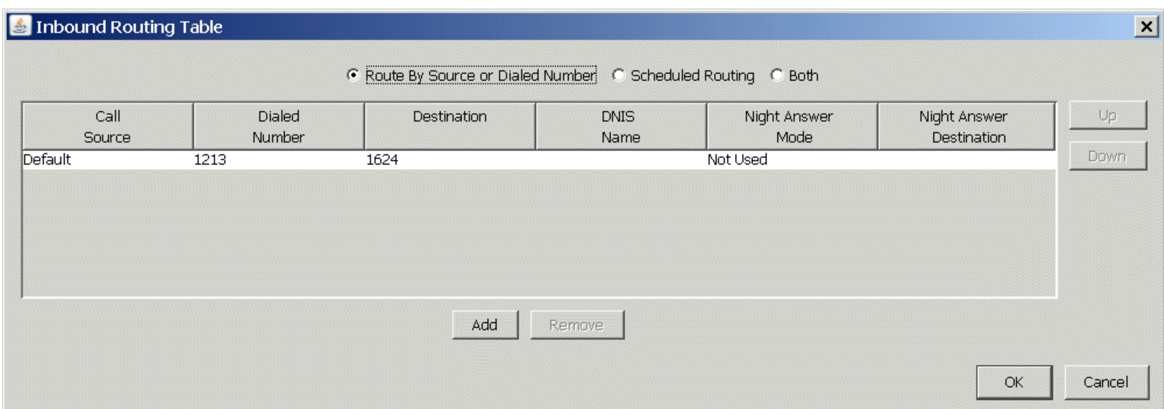
2 Select the trunk group defined for your DID numbers and click **Edit**.

3 On the In tab, click **Edit Inbound Routing Table**.

4 Click **Add** to add a new rule.

5 For the new rule:

- Click in the **Dialed Number** column and enter the DID number. You can create a single rule to handle all calls for a range of DID numbers by entering a wildcard value, for example 85xxxxx.
- Click in the **Destination** column and enter the extension of the auto attendant that will handle incoming calls to this DID number or range.



6 Click **OK** to save your changes, and exit Trunk Groups.

Enabling Call Notes pop-ups for ViewPoint users

When a ViewPoint user receives a call, an Incoming Call Alert window pop- ups. By default, this window displays only the name and phone number of the caller.

You can optionally attach a script or other information to all calls for a campaign. To include this text in the pop-up, perform the following steps for each user who will be handling campaign calls:

1. In the Global Administrator Management Console, click **User/Group Management**, located in the PBX Administration section.
2. Click the Users icon in the view bar, and edit the user.
3. On the ViewPoint tab, select the **Field 1** checkbox.
4. Select **Comments** from the drop-down list.
5. Click **OK** to save your change.

For more about setting custom call alerts, launch WaveHelp in the Global Administrator Management Console. Expand the Contents pane and then choose **Managing Users and Roles > The ViewPoint tab**.

Using Wave Campaign Tracker

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About Campaign Tracker user accounts

In order for a Wave user to run Campaign Tracker, a user account needs to be set up via Wave Password Administration in the Global Administrator Management Console.

You can either set up an individual account for each user, or add each user as a member of a Windows Active Directory domain group that has at least User access level.

For more information about setting up Active Directory-integrated users in Wave, launch WaveHelp in the Global Administrator Management Console. Expand the Contents pane and then choose **Before You Begin > Adding accounts and passwords**.

Launching Wave Campaign Tracker

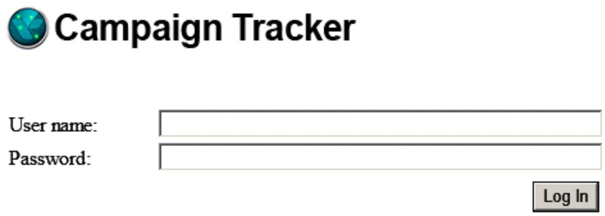
To launch Wave Campaign Tracker

1 In your browser, go to the following location:

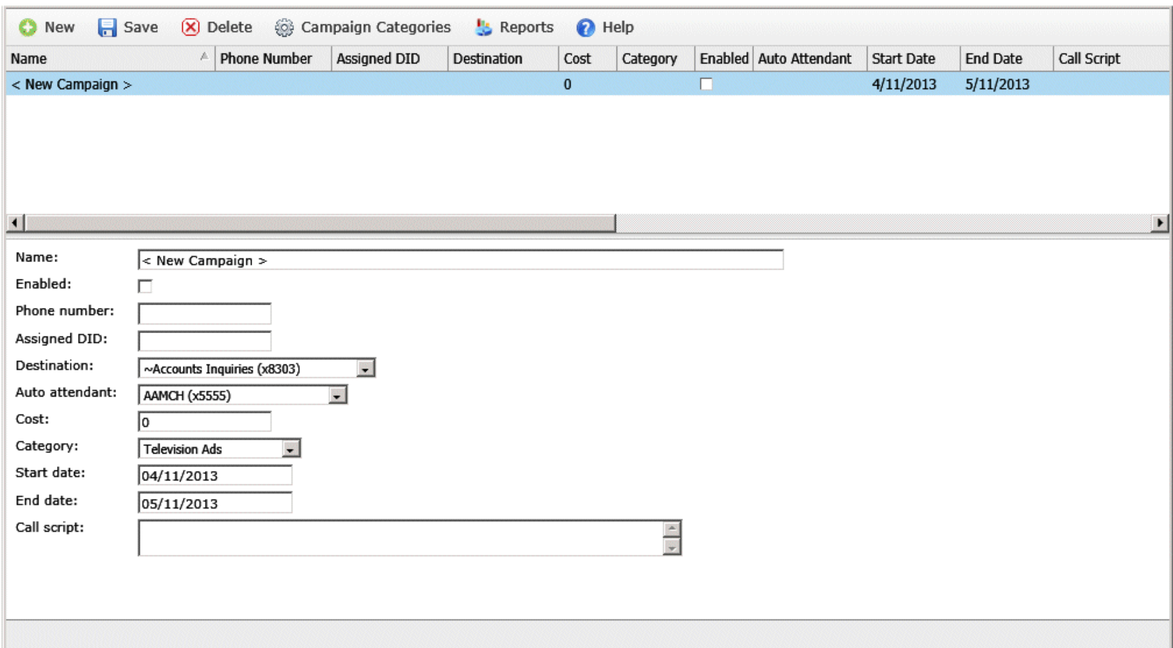
```
http://<Server>/admin/campaigntracker.aspx
```

where <Server> is the name of the Wave Server that is hosting Campaign Tracker.

2 Log on using your domain credentials:



3 Campaign Tracker opens:



Navigating Wave Campaign Tracker

Below the toolbar, the Campaign Tracker window is divided into the following sections. Chapter 4 describes how to use these sections to create a custom campaign.

- Toolbar
- Main section
- Campaign Details section

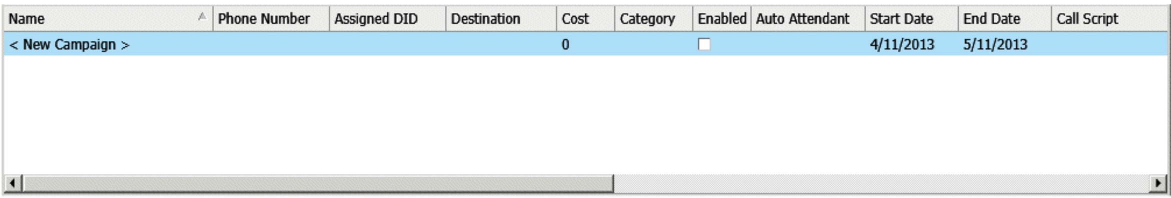
Toolbar

The following options are available on the toolbar at the top of the window:

- **New.** Click to create a new campaign. Creating a new campaign is described in detail in Chapter 4.
- **Save**. Click to save the selected campaign using all current settings.
- **Delete**. Click to delete the selected campaign.
- **Campaign Categories**. Click to add or edit a campaign category. See Chapter 4 for details.
- **Reports**. Click to report on results for the selected campaign or campaigns. Campaign reports are described in detail in Chapter 5.
- **Help**. Click to view Campaign Tracker Help.

Main section

The grid displays any campaigns created so far.

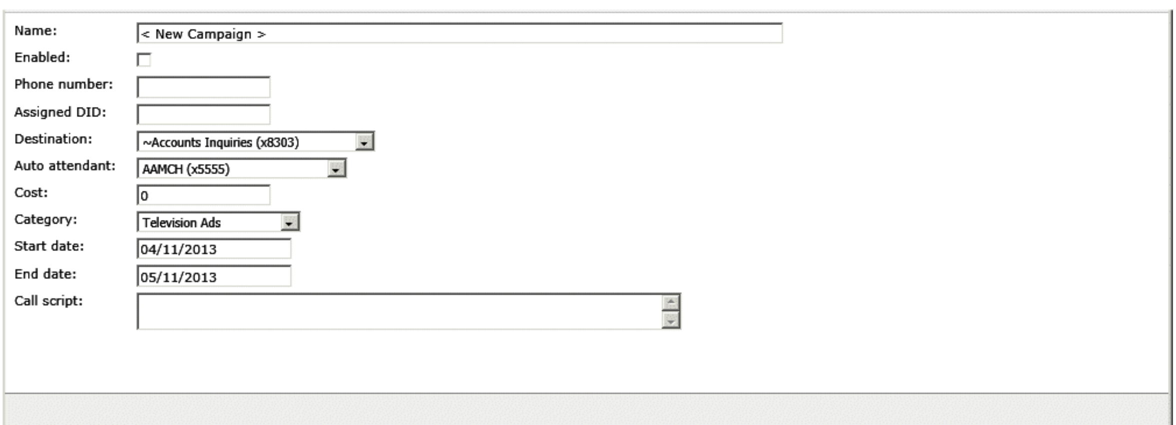


Campaign statuses and statistics are described in detail in Chapter 5.

The fields below the grid reflect the currently-selected campaign. You specify this information when you create or clone a campaign, and can change it later.

Campaign Details section

You use this section to create a new campaign or edit an existing one.



Creating a new campaign is described in detail in Chapter 4.

Creating a Campaign

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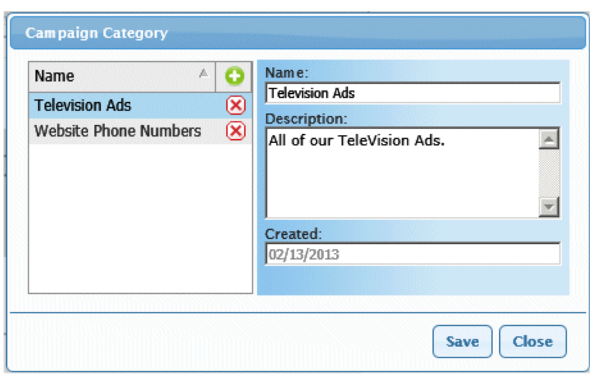
Creating campaign categories

You create campaign categories so that you can track and report on multiple campaigns, for example all e-mail campaigns, all TV campaigns, all Web campaigns, and so forth. When you create a campaign, you assign it to a campaign category.

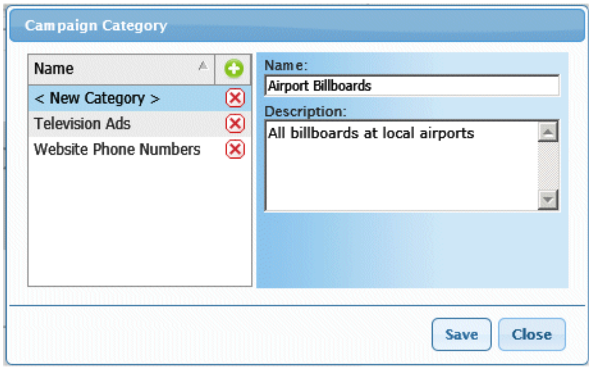
1 Click **Campaign Categories** on the toolbar.

2 The Campaign Category dialog lists the categories defined so far.



3 Click .

4 Enter a **Name** and **Description** for the new category.



5 Click **Save** and then click **Close**.

Creating a campaign

1 Click **New** on the toolbar.

The first time you launch Campaign Tracker—or anytime you launch it and there are no campaigns defined—the **New** toolbar button is disabled and you are automatically in create mode.

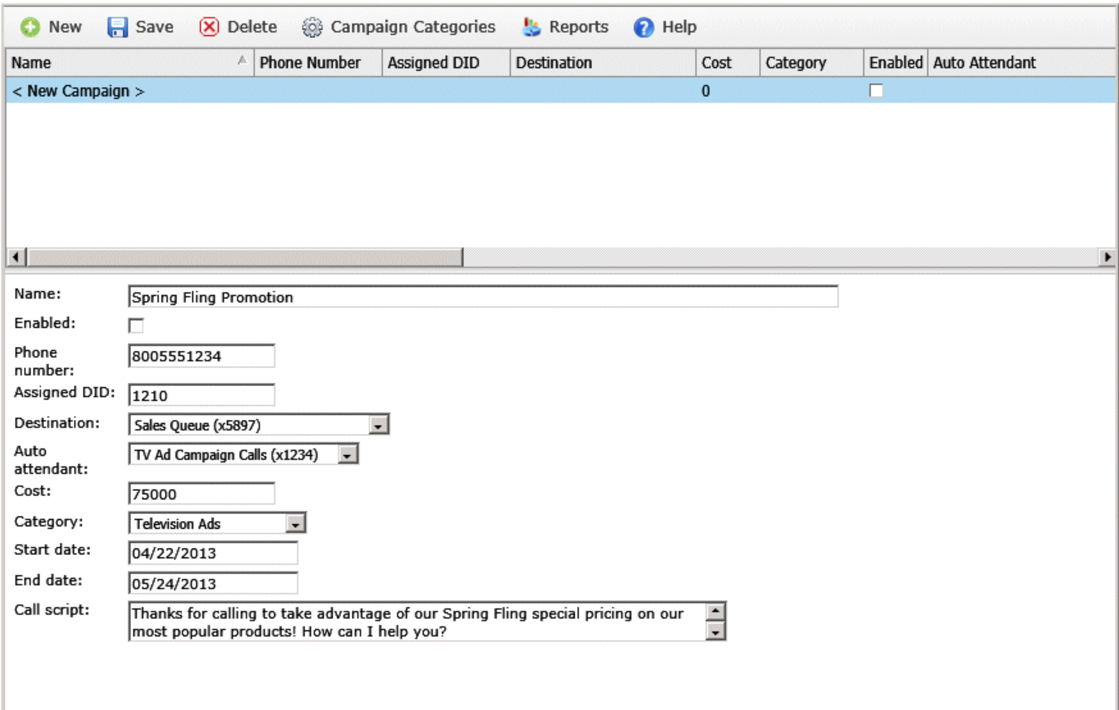
You can save your campaign-in-progress at any time by clicking **Save** on the toolbar.

2 Enter the following information for the new campaign:

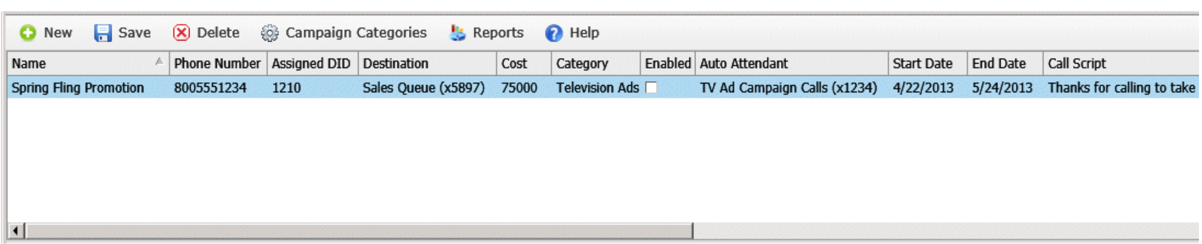
- **Name**. Uniquely identifies the campaign.
- **Enabled**. Select this checkbox to add Campaign Tracker rules to this campaign's auto attendant. When not selected, this campaign is inactive and no reporting can be performed.
- **Phone number**. Phone number for this campaign, for example the number that appears in a print or television ad, Web page, and so forth. This is the actual number that people call—for example, "1-800-CARS"—so that you can easily identify the campaign's number in reports.

- **Assigned DID**. DID used in Wave to route inbound calls responding to this campaign to the appropriate auto attendant. DID is also used to identify a campaign's calls when reporting on campaign results. Note that you cannot assign the same DID number to more than one campaign during the same active date range.
- **Destination**. Wave extension to which this campaign's calls will be directed.
- **Auto attendant**. Auto attendant extension that answers inbound calls to the assigned DID.
- **Cost**. Total cost of this campaign.
- **Category.** Category associated with this campaign.
- **Start date/End date**. Click in the field to select the days when the campaign begins and ends.
- **Call script**. Optional field that you use to enter text (maximum 500 characters) that will pop up as Call Notes in ViewPoint when the call is answered at the destination extension.

Make sure that all destination extensions are set up to display Call Notes in the ViewPoint Incoming Call Alert window—see “Enabling Call Notes pop-ups for ViewPoint users” on page 2-5.



3 When you are done, click **Save** on the toolbar. The new campaign is now listed in the main section:



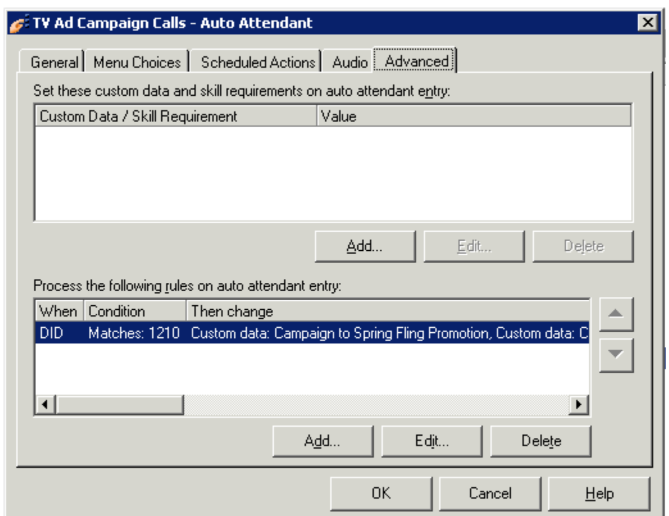
How Campaign Tracker uses Call Classifier rules

When you create a campaign and enable it, Campaign Tracker automatically adds a Call Classifier rule to the auto attendant associated with the campaign.

This rule matches the DID entered when the campaign is created to incoming calls to that DID, sends each matching call to the specified auto attendant, and sets some custom data variables. These custom data variables are later used when running Campaign Tracker reports.

You cannot modify or delete this rule, but it is visible on the auto attendant's Advanced tab so that you know how this auto attendant is used. If the campaign is modified later, the Call Classifier rule will be updated automatically, if the campaign is enabled.

To view the rule, edit the auto attendant and click the Advanced tab.



Adding Call Classifier rules

Important: Adding Call Classifier rules to a Campaign Tracker auto attendant is **not recommended** because doing so may cause Campaign Tracker to stop working.

Modifying and deleting Call Classifier rules

You cannot modify a Call Classifier rule in a Campaign Tracker auto attendant, delete a Call Classifier rule from an auto attendant, or delete the auto attendant itself if the auto attendant is being used by any enabled campaign. You must first delete or disable all associated campaigns in Campaign Tracker.

Reporting on Campaign Results

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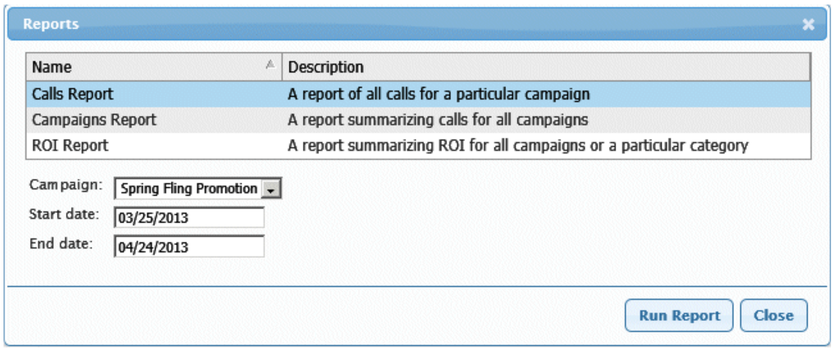
You can run the following reports on campaign results:

- The **Calls report** shows the total number of calls placed by the campaign that you specified, and summarizes the results.
- The **Campaigns report** shows the total number of calls placed for each campaign that you selected.
- The **ROI report** breaks down how much money was spent on the campaigns that you selected.

Running a report

To run a report

1 Click **Reports** on the toolbar.



2 Select a report to run.

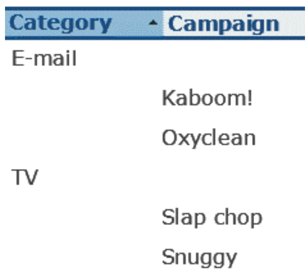
- **Calls report:** Select the **Campaign** to report on from the drop-down list.
- **ROI report:** Select the campaign **Category** to report on from the drop-down list. Select <all> to report on all categories.
- **For *all* reports**, specify the **Start date** and **End date** to report on. Click in each text box and select a date from the calendar.

3 Click **Run Report**.

Viewing report results

The report opens in a separate browser window or tab, where it can be saved or printed. You can sort on any column by clicking the column header. You can e-mail a report and the recipient can also interact with the report results.

- **To sort a report** in a variety of ways, click on any column header.



- **To save a report**:
  - **a** In your browser window, click **File > Save as…** .
  - **b** Select the format to save the report as from the **Save as type** drop-down list.
  - **c** Specify a location and then click **Save**.
- **To distribute a report**, attach the saved HTML file to an e-mail.

Calls report

The Calls report shows the total number of calls placed by the campaign that you specified, and summarizes the results—how many calls were completed, sent to voicemail, transferred, or abandoned.

Calls Report for Slap chop

Date Range: 01/01/1753 - 12/31/9999

Total Call Results

- 2 Total Calls
- 1 Completed
- 0 Voicemail
- 0 Transferred
- 1 Abandoned
- 0 Other

Caller Phone Number	Caller Name	Length of Call	Time	Date	Result
NONE	NONE	00:00:15	11:51 AM	12/20/2012	Completed
NONE	NONE	00:00:00	11:52 AM	12/20/2012	Abandoned

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A Caller Phone Number or Caller Name of "NONE" indicates that this information was blocked by the called party.

Campaigns report

The Campaigns report shows the total number of calls placed for each campaign that you selected.

Campaigns Report

Date Range: 01/01/1753 - 12/31/9999

Category	Campaign	Phone Number	Unique Calls	Average Time to Answer	Start Date	End Date
E-mail	Kaboom!	8005551414	0	00:00	12/21/2012	01/20/2013
E-mail	Oxyclean	8005551313	3	00:03	12/19/2012	01/18/2013
TV	Slap chop	8005551212	2	00:10	12/19/2012	01/18/2013
TV	Snuggy	8005551414	1	00:08	12/21/2012	01/20/2013

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The Unique Calls column indicates how many calls were made for each campaign. In the example above, there are 2 e-mail campaigns—the Oxyclean campaign resulted in 3 calls.

ROI report

The ROI report breaks down how much money was spent on the campaign categories that you selected.

ROI Report
Date Range: 01/01/1753 - 12/31/9999

Totals

$1,035,314 Total Cost

4 # of Campaigns

3 Total Answered Calls

Category	Campaign	Phone Number	Total Calls	Answered Calls	Cost
E-mail					**TOTAL - $1,005,314**
	Kaboom!	8005551414	0	0	$5,314
	Oxyclean	8005551313	3	1	$1,000,000
TV					**TOTAL - $30,000**
	Slap chop	8005551212	2	1	$20,000
	Snuggy	8005551414	1	1	$10,000

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