

Creating campaigns

To create campaigns, you need to :

1. Click on the **Settings** option in the left panel screen, then choose **Campaign & Sites** in sub menu.
2. Click the **+** button at the bottom right of screen
3. Fill in the details as required:
 - **Name** the campaign
 - Choose the **Time zone**
 - Click the slider to ensure '**Is Active**'.
 - Enter How many hours/weeks worked by an agent is equal to **1 FTE** (Full Time Equivalent).
 - If forecasting and scheduling for **Chat**, then enter the number of concurrent chats agents within the campaign can handle simultaneously.
4. Enter the **Campaign Opening Hours**. Any closed days should be ticked.
5. If Shift Swapping is allowed for this campaign, click the slider to switch it on.
 - a. Enter notice period (days)
 - b. Enter max agent requests (per week)
 - c. Choose setting that agents can swap with
 - i. All Skills Must Match
 - ii. One Skill Must Match
 - iii. No Skills Must Match
 - d. Choose setting for if agents can swap shifts if other activities have been scheduled (such as Training, Meeting etc.)
6. Enter the **Shrinkage %** that is the allowance for the campaign.
 - Shrinkage is anything that takes time away from agents working on the campaign. (Holidays, sickness, meetings, training, etc.) This should only be for **unplanned** activities.
7. Click 'Create' when all information is correct.

Trial

Campaign Name *

Trial

Time Zone *

(UTC-10:00) Hawaii

FTE *

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Concurrent Chats

Is Active

Allow Schedule Without A Forecast

Service Goal ASA

Campaign Has Low Volume Queues

Shift Settings

Opening Hours

Shrinkage

Changes have been made

Create

These details can be edited at any time by making changes and clicking**Save**.