

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* 20

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**.