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Accessing the Application

Once the CAMPUSCALL web page is launched, the login screen is visible. The CAMPUSCALL Support phone number is listed on the bottom right side of the screen.

Enter your user name and password to access CAMPUSCALL. Then click Login.

When callers log in: CAMPUSCALL automatically displays their first prospect and begins calling. The Telemarketing Routine can only be launched if the user has calling pools assigned to their account.

When Managers/Supervisors log in: the administrative screen is launched.

If you forget your password, it can be emailed to the email address on record for the user name. Select Forgot Your Password from the main log in screen. Enter your user name and click Get Password. A message screen indicates that the email was sent.

Managers and supervisors can access the calling routine by going to the Calling Shift menu at the top of the screen, clicking Online Telemarketing, and selecting Start Calling Pool.
The Telemarketing Routine

This is the home page within the CAMPUSCALL Telemarketing Routine. Information a caller might need when contacting a prospect is located on this screen; the information displayed here depends on the data you loaded into CAMPUSCALL.
Navigating the Telemarketing Routine

Once the Telemarketing Routine has launched, locate the Menu Bar on the left side of the screen. Callers use this menu to navigate around CAMPUSCALL. At the top of the menu, all current call details are available, such as the dial and hang up options as well as the number being attempted.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dial/ Hang Up</td>
<td>The caller can manually call a prospect or end the phone call. When a caller is attempting a prospect, the menu fades to yellow; when they are on the phone with a prospect, the menu fades to green.</td>
</tr>
<tr>
<td>Number to Call</td>
<td>Defaults to the home phone, however the caller can select any number in the drop-down. Numbers added in change demographics appear here. Listed beside the phone number in parentheses may be the Phone Type (Unknown, Land Line, Mobile, or Mobile/Ported).</td>
</tr>
<tr>
<td>Privacy Manager</td>
<td>The caller clicks this button to use the keypad on the keyboard to enter an extension or the phone number from which they are calling.</td>
</tr>
<tr>
<td>Auto Hangup</td>
<td>The caller can turn Auto Hangup on or off. For computers which may have trouble hanging up on prospects, this should be selected at the beginning of the call to avoid accidental hang-ups.</td>
</tr>
</tbody>
</table>

One of the most important menu items is the Actions menu.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specified Pledge</td>
<td>Allows the user to enter a specified pledge.</td>
</tr>
<tr>
<td>Unspecified Pledge</td>
<td>Allows the user to enter an unspecified pledge.</td>
</tr>
<tr>
<td>No Pledge</td>
<td>Allows the user to complete the call with no pledge. (refusal)</td>
</tr>
<tr>
<td>Matching Company</td>
<td>Allows the user to access the matching company information and search screens.</td>
</tr>
<tr>
<td>Comments</td>
<td>Allows the user to manually access the free form comments.</td>
</tr>
<tr>
<td>Change Demographics</td>
<td>Allows user to update demographic information.</td>
</tr>
<tr>
<td>End Session</td>
<td>Logs the user out of CAMPUSCALL after they choose a result code for the current record on their screen.</td>
</tr>
<tr>
<td>Exit Online Routine</td>
<td>Allows the user to exit the calling routine without coding the call or saving changes. This is only visible to supervisor or high roles.</td>
</tr>
</tbody>
</table>
**Telesense & the Telemarketing Routine**

Telesense is a new feature in CAMPUSCALL that allows callers to call through each of the available phone numbers for a given prospect while assigning result codes to each phone number. As “bad” or unreachable phone numbers are encountered, they are marked and future attempts will exclude those numbers from being attempted. The Telemarketing Routine has been enhanced to perform looped calling for the specified “good” phone numbers on a prospect before moving on to the next prospect.

If the telesense feature has been enabled, callers are able to click on the available numbers drop-down to see what numbers could potentially be called.

The drop-down menu includes:
- Phone number
- Phone field
- Status, which indicates if the number is a known valid phone number. A phone number will have a valid/invalid status assigned to it once the number has been attempted.
- Result, when attempted at least once.

Callers will also indicate what phone number should be used on subsequent attempts for a Callback.
**Prospect/Spouse Demographics**

Located at the top of the Telemarketing Routine is prospect and spouse information. To switch between the spouse and prospect, click on the tab where their name is located. If there is no spouse information, the tab will indicate ‘Spouse’ instead of a name.

To edit information, simply click on the field which needs to be updated. Changes to items such as phone numbers or email can be made directly in location. Changes to items such as the name or address will be made from a pop-up window.

The right side of the screen is the area to edit prospect and spouse employer information.

Once all changes are made, click *Save*. **If you do not click the Save button, no changes will be saved.** Prospect and/or Spouse information must be saved prior to switching to a new tab. If you make a mistake in any of the demographic fields, use the *Undo* button.

The information changed here appears on the Change Demographic Report.

**Note:** Clicking the *Undo* button will undo every change that has been made to this record, not just the last field that was edited. You will not have the option to redo any changes that were undone.
Prospect/Spouse Demographic Folders continued

In addition to editing the demographic information from the main calling screen, you can also use the *Change Demographic* option from the *Actions menu*. This gives you access to additional demographic fields that aren’t displayed on the main screen such as additional phone numbers, additional email accounts, preferred name, and salutation. You can change the Prospect and Prospect Employer information, as well as the Spouse and Spouse Employer information.

Remember to save changes by clicking *Save*. The information changed here appears on the change demographic report.

**Note:** If no changes are made, callers should click *Cancel* to return to the previous screen. Clicking *Save* when no changes were made will result in the record unnecessarily appearing on the Change Demographic Report.

When entering or editing a phone number, the caller will also be able to select *Phone Type*. Once the caller clicks on the phone type they would like to change, a box appears for them to update the Phone and Country for that prospect.
**Children & User Fields**

A child information tab will display next to the spouse tab if child information was loaded with the prospect record. Basic child information can be loaded such as name and graduation information.

<table>
<thead>
<tr>
<th>Name</th>
<th>Gender</th>
<th>School</th>
<th>Grad. Date</th>
<th>Grad. Semester</th>
<th>Misc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>David Pitt</td>
<td></td>
<td></td>
<td>2015</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

User Fields are defined in your data file. Such information as giving societies, life-to-date gift history, ask amounts, solicitation codes, or source codes can be placed here.

- Lifetime Giving Total: $2,500
- Total Number of Gifts: 5
- Alumni Association Member: No
Prospect Call History, Gift History, Education & Affiliation

Additional information about the prospect and spouse is located below their demographic information. Each category may have multiple entries. If additional entries are available, a (+) sign appears for that category. Select the (+) sign or double click the category heading and the category expands to display all entries. Use the (–) sign to collapse the category again.

### Prospect Call History

<table>
<thead>
<tr>
<th>Date</th>
<th>Talked With</th>
<th>Talk Time</th>
<th>Result</th>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/14/14</td>
<td>P</td>
<td>00:00</td>
<td>Anu Machin</td>
<td>Sarah</td>
</tr>
</tbody>
</table>

### Prospect Gift History

<table>
<thead>
<tr>
<th>Gift Date</th>
<th>Amount</th>
<th>Design</th>
<th>Last Paid Amount</th>
<th>Last Paid Date</th>
<th>Match Amount</th>
<th>Design By</th>
<th>Gift Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>$40.00</td>
<td>Annual Fund</td>
<td>$0.00</td>
<td></td>
<td>$40.00</td>
<td>P</td>
<td></td>
</tr>
<tr>
<td>2002</td>
<td>$50.00</td>
<td>Library Fund</td>
<td>$0.00</td>
<td></td>
<td>$0.00</td>
<td>P</td>
<td></td>
</tr>
</tbody>
</table>

### Prospect Education

<table>
<thead>
<tr>
<th>Grad. Date</th>
<th>School Name</th>
<th>Major</th>
<th>Degree</th>
<th>Campus</th>
</tr>
</thead>
<tbody>
<tr>
<td>1985</td>
<td>College of Business</td>
<td>Accounting</td>
<td>Bachelor</td>
<td></td>
</tr>
</tbody>
</table>

### Prospect Affiliation

<table>
<thead>
<tr>
<th>Fraternity Sorority</th>
<th>Clubs Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>College House</td>
<td>Glee Club</td>
</tr>
</tbody>
</table>

The Prospect Call History information is located in the middle of the screen and displays all previous results for a prospect. If a prospect has not been called before, the call history will list 'No Attempt' in the result line.

<table>
<thead>
<tr>
<th>Date</th>
<th>Talked With</th>
<th>Talk Time</th>
<th>Result</th>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/12/14</td>
<td>S</td>
<td>00:00</td>
<td>No Answer</td>
<td>Sarah</td>
</tr>
<tr>
<td>3/12/14</td>
<td>S</td>
<td>00:00</td>
<td>Busy</td>
<td>Sarah</td>
</tr>
<tr>
<td>3/12/14</td>
<td>S</td>
<td>00:00</td>
<td>Not Avail</td>
<td>Sarah</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>The date the last attempt was made.</td>
</tr>
<tr>
<td>Talked With</td>
<td>Indicates who the caller talked with on the phone; P-Prospect, S-Spouse, O-Other.</td>
</tr>
<tr>
<td>Result</td>
<td>The result of the last attempt.</td>
</tr>
<tr>
<td>Employee</td>
<td>Employee who made the attempt.</td>
</tr>
</tbody>
</table>
Prospect Call History, Gift History, Education & Affiliation continued

The Prospect Gift History information is displayed below the Call History and displays the previous gift amounts. If a prospect has not given previously, the Gift History tab will not appear. The first row will appear in blue font if last gift data was loaded into the prospect_base table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gift Date</td>
<td>The date of the last gift.</td>
</tr>
<tr>
<td>Amount</td>
<td>The amount of the last gift.</td>
</tr>
<tr>
<td>Designation</td>
<td>The designation for the gift made.</td>
</tr>
<tr>
<td>Last Paid Amount</td>
<td>The dollar amount that was last paid.</td>
</tr>
<tr>
<td>Last Paid Date</td>
<td>The date that the last gift was paid</td>
</tr>
<tr>
<td>Match Amount</td>
<td>Indicates if there was a matching amount</td>
</tr>
<tr>
<td>Designated By</td>
<td>The individual who gave the gift</td>
</tr>
<tr>
<td>Gift Status</td>
<td>Where the payment stands</td>
</tr>
</tbody>
</table>

The Prospect Education information is displayed after the Gift History in the middle section of the screen and displays the education known for this prospect.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grad Date</td>
<td>The prospect's preferred graduation date.</td>
</tr>
<tr>
<td>School Name</td>
<td>The name of the school the prospect attended.</td>
</tr>
<tr>
<td>Major</td>
<td>The prospect's major.</td>
</tr>
<tr>
<td>Degree</td>
<td>The prospect's degree.</td>
</tr>
<tr>
<td>Campus</td>
<td>The campus from which the prospect graduated.</td>
</tr>
</tbody>
</table>

The Prospect Affiliation information is displayed after the Prospect Education and displays the affiliations for this prospect.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fraternity/Sorority</td>
<td>The prospect’s Fraternity/Sorority</td>
</tr>
<tr>
<td>Clubs/Organizations</td>
<td>The prospect’s Club/Organization</td>
</tr>
</tbody>
</table>
**Completes**
Completes are located near the top of the Menu Bar. Completes are prospects that will not be attempted again during the current campaign. To record a result for a prospect, click the desired result code. Once a Complete result code is selected, you are taken to the next prospect.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Already Pledged</td>
<td>The prospect has already given a gift to the current campaign.</td>
</tr>
<tr>
<td>Deceased</td>
<td>The prospect has passed away. Attempt to capture the date of the death.</td>
</tr>
<tr>
<td>Disconnect</td>
<td>You reach a recording. The phone is permanently out of service.</td>
</tr>
<tr>
<td>Do Not Call</td>
<td>The prospect wants to be taken off the calling list. They will still receive mail.</td>
</tr>
<tr>
<td>No English</td>
<td>The prospect does not speak English.</td>
</tr>
<tr>
<td>No Pledge</td>
<td>The prospect refuses to make a donation this year.</td>
</tr>
<tr>
<td>Out of Country</td>
<td>The prospect is living out of the country.</td>
</tr>
<tr>
<td>Reassigned Number</td>
<td>The phone number has been reassigned to a new person. The residents at the phone do not know the prospect you are attempting to reach.</td>
</tr>
<tr>
<td>Remove From List</td>
<td>The prospect asks specifically to be taken off of mailing and calling lists.</td>
</tr>
<tr>
<td>Specified Pledge</td>
<td>The prospect commits to a specific dollar amount.</td>
</tr>
<tr>
<td>Unspecified Pledge</td>
<td>The prospect wants a pledge card, but will not commit to a dollar amount.</td>
</tr>
<tr>
<td>Whereabouts Unknown</td>
<td>Contact was made with a relative, friend or former roommate. The prospect no longer lives at that number, and the new number is not provided.</td>
</tr>
<tr>
<td>Fax Complete</td>
<td>Third time the number has been a fax or modem.</td>
</tr>
</tbody>
</table>
Incompletes

Following Completes is the Incompletes option. Incompletes are prospects that will be attempted again during the current campaign. Callers should get in the habit of clicking the hang up button prior to coding any type of call. Again, to record a result for a prospect record, simply click on the result code. Once an Incomplete result code has been selected, you are taken to the next prospect.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answering Machine</td>
<td>You reach the prospect’s voice mail/answering machine. Do not leave a message.</td>
</tr>
<tr>
<td>Busy</td>
<td>You reach a busy signal. CAMPUSCALL may automatically hang up and code the record as a busy.</td>
</tr>
<tr>
<td>Daytime Callback</td>
<td>The prospect cannot be contacted during the evening. A calling pool will be created automatically for these prospects to be assigned during daytime hours.</td>
</tr>
<tr>
<td>Callback</td>
<td>The prospect tells you a specific date/time to try again. This is caller specific.</td>
</tr>
<tr>
<td>General Callback (Anyone)</td>
<td>The prospect specifies a date/time to try again, but any caller can reattempt the record. This record will be available again on the schedule day/time to any available caller assigned to the calling pool.</td>
</tr>
<tr>
<td>No Answer</td>
<td>The phone rings the maximum number of rings and no one answers. CAMPUSCALL may automatically hang up and code the record a no answer.</td>
</tr>
<tr>
<td>Not Available</td>
<td>You get an answer at the residence; however the prospect is not available at this time. This record may be reattempted in 24 hours.</td>
</tr>
<tr>
<td>Not Available One/Two</td>
<td>The prospect is not available and will be reattempted in one/two hours.</td>
</tr>
<tr>
<td>Privacy Manager</td>
<td>You reach a recorded message that states the attempted party doesn’t accept unidentified calls. A calling pool will be created automatically for these records to be called at a later date.</td>
</tr>
<tr>
<td>Fax Incomplete</td>
<td>You reach a fax line. This code is used the 1st and 2nd time the fax machine is reached.</td>
</tr>
</tbody>
</table>
Result Codes continued
To record a result for a prospect's record, simply click on the appropriate result code. There are a variety of actions the result can activate which depend on how the result code is set up.

There may be an “Are You Sure?” prompt or the Comments screen might appear. If the result selected was Specified Pledge or Unspecified Pledge, you would enter the pledge routine.

Callbacks
To view all scheduled callback, select Callbacks from the Menu Bar. If necessary, the caller can manually bring the callback record back to their screen. Select the radio button for the prospect and click Process.

The callback record will be the next record on the caller's screen.
**Scripts**

All scripts available to the caller are located under the Scripts menu item. A pop-up window appears allowing callers to select the appropriate script.

1. Select the *Type* of script on the left side drop-down. The name drop-down box then populates with the corresponding available scripts.

2. Select the *Name* of the script you wish to view, and it appears in the space below.
Summary
From the Menu Bar, the Summary option provides the caller with a synopsis of all information known about the prospect.

Caller Stats/Project Stats
Caller Stats displays the individual caller’s stats for the current night of calling while Project Stats displays the combined stats for all callers within the project. Callers can select to view stats by General Info, Completes or Incompletes by selecting the corresponding radio button.
**Previous Results**
From the Previous Results option the caller can view their last 20 completes or incompletes for their current day of calling. This can be used to identify a prospect that the caller miscodes. Once the caller locates the prospect’s name, a supervisor can use their information to locate the record and make the necessary changes.

<table>
<thead>
<tr>
<th>Time</th>
<th>Prospect Name</th>
<th>Result</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>02:44 PM</td>
<td>Timothy Dodge (1021271)</td>
<td>Not Avail</td>
<td>Not dialed</td>
</tr>
<tr>
<td>02:44 PM</td>
<td>Sara Roostier (1283378)</td>
<td>Ans Machin</td>
<td>Not dialed</td>
</tr>
<tr>
<td>02:44 PM</td>
<td>Michele Pitt (1007097)</td>
<td>Busy</td>
<td>Not dialed</td>
</tr>
</tbody>
</table>

**Messages**
The Messages option displays messages from the manager/supervisor to the caller. This tab only appears once a message has been sent to the caller. To view the text of the message, select the row containing the message and all text appears below.

**Notifications**
Notification boxes will appear at the top of the caller’s screen when a record contains comments, was a callback, or was previously not coded correctly. A notification box will also appear when the caller receives a new message. These notification boxes will disappear after a second or two of being on the screen.
**Specified and Unspecified Pledges**

The Pledge Routine records the pledge information for specified and unspecified pledges. You are able to enter the amount of the pledge, choose the number of designations, payment schedule, payment options, mail code, matching code and change demographics from this screen. If the pledge is Unspecified, you won't be able to enter the pledge amount, frequency, or payment options, but you must still enter the designation, mail code, and matching gift information.

Begin by entering the amount for the pledge at the top of the pledge screen.

**Callers can access the Pledge screen by using the Specified or Unspecified Pledge icon from the Actions menu or by selecting the Specified or Unspecified result code from the Completes tab.**
**Frequency**
The Payment Schedule section allows the caller to indicate if the prospect is fulfilling the pledge in one payment or installments. Use the *Frequency* drop-down menu to select the payment frequency and the specific details for that schedule appear.

If the pledge is to be split unequally, the amount per payment can be edited by retyping a dollar amount. To enter a pledge based on payment amount, select the radio button next to *Payments*. The *Amount* value will be used to create the initial payment schedule according to the frequency and duration values specified. To delay the first payment, change the pledge date by using the calendar icon or simply typing the new due date in the box. Then select the frequency for the pledge.

If the project is a capital campaign allowing for multi-year pledges, callers have the ability to select the number of years for the pledge by using the drop-down menu.

![Pledge Schedule](image)

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>Customized payment option.</td>
</tr>
<tr>
<td>Annual</td>
<td>Payment scheduled once a year.</td>
</tr>
<tr>
<td>Semi-Annual</td>
<td>Payment scheduled twice a year, six months apart.</td>
</tr>
<tr>
<td>Quarterly</td>
<td>Payment scheduled four times a year, 3 months apart.</td>
</tr>
<tr>
<td>Every Other Month</td>
<td>Payment scheduled every other month.</td>
</tr>
<tr>
<td>Monthly</td>
<td>Payment scheduled each month.</td>
</tr>
</tbody>
</table>

*Note:* Sustaining gifts can also be accepting using CAMPUSCALL; however, the gift must be made with a monthly frequency and by credit card. Once credit card information has been entered, a sustaining gift check box will appear in the frequency menu bar.
**Payment Options**

Once the Frequency information has been completed, the Payment type allows the caller to specify the pledge payment type. There are three payment type options: check, credit, or EFT (Electronic Funds Transfer). All pledges default to check as the payment type.

<table>
<thead>
<tr>
<th>Payment Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check</td>
</tr>
<tr>
<td>Credit</td>
</tr>
<tr>
<td>EFT</td>
</tr>
</tbody>
</table>

**Inputting Credit Cards**

The window below is seen if you do not have online giving set up for real time credit card processing. The caller can mark the pledge as a credit payment type but can only enter the credit card type. No specific credit card information can be stored in CAMPUSCALL.

<table>
<thead>
<tr>
<th>Payment Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check</td>
</tr>
<tr>
<td>Credit</td>
</tr>
<tr>
<td>EFT</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Card Type:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mastercard</td>
</tr>
</tbody>
</table>

**Online Giving**

If the project is configured to use a credit card vendor with an online giving interface, the caller will see a *Launch <vendor name>* button when they select credit as the payment type.

In order to enable it, three pieces of information must be completed:

1. Pledge Amount
2. Designation
3. Schedule/Frequency

When selected, a pop-up window with the vendor-specific credit card processing page appears. The caller can then enter the credit card number and expiration date. The vendor site may require the caller to complete address fields as well. Once the payment is processed and the result is shown, the pop-up window can be closed.

If the credit card transaction has been declined, the caller can use the transaction status drop-down to select if the transaction was a *Success* or *Failure*. 
**EFT (Electronic Funds Transfer)**

The EFT option indicates a payment by electronic fund transfer or automated bank withdrawal (ABW). There are three options for this payment type.

1. It can be used simply as a selection with no other information captured; the intent is to have someone other than the caller capture the information later.

2. It can be configured to bring up the EFT capture window where the caller would then need to capture the Bank Name, Transit or Routing Number, and the prospect's Account Number to be stored in CAMPUSCALL.

3. If the project is configured to use an EFT vendor with an online transaction interface, the caller will see a Launch <vender name> button when they select EFT as the payment type.

When selected, a pop-up window with the vendor-specific EFT processing page appears. The caller can then enter the required data. Once the transaction is processed and the result is shown, the pop-up window can be closed.

If the transaction has been declined, the caller can use the transaction status drop-down to select if the transaction was a Success or Failure.
**Designation Information**

Once the pledge amount has been entered, the pledge is required to have a designation. The Designation information section allows the caller to choose up to 6 designations for the pledge. To select a designation, begin typing into the Designation box; a pop-up window will appear displaying all designations that contain the letters you typed in the box. To view all designations, select View All; Select Other to enter a free-format designation.

<table>
<thead>
<tr>
<th>Designation</th>
<th>Amount</th>
<th>By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Fund</td>
<td>$20.00</td>
<td>Prospect</td>
</tr>
<tr>
<td></td>
<td>$50.00</td>
<td>Prospect</td>
</tr>
</tbody>
</table>

### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td># of Designations</td>
<td>From the drop-down, select the number of designations needed.</td>
</tr>
<tr>
<td>Designation</td>
<td>All designations loaded into CAMPUSCALL appear in this drop-down. You can also type in your own designation by using the 'Other' option.</td>
</tr>
<tr>
<td>Amount</td>
<td>The amount allocated to the designation. If the pledge is split to multiple designations, the amount is automatically split equally. However, the amounts to each designation can be changed.</td>
</tr>
<tr>
<td>By</td>
<td>Allows you to specify whether the gift is from the Prospect, Spouse, or Both.</td>
</tr>
<tr>
<td>Under By/Over By</td>
<td>If this box appears, the total designation amount is under or over by the amount displayed in the box.</td>
</tr>
</tbody>
</table>
Mail To
The Mail tab indicates to which address the pledge card will be mailed and defaults to prospect home. If the address needs to be edited, use the Edit Mailing Label button. The caller can choose to mail to Prospect, Spouse or Both as well as to the Home, Business or Other address.

Match
Matched by details are located within the summary area of the pledge screen and is used to indicate if this pledge has a matching gift from the prospect or spouse employer.

If matching gifts are allowed, select Prospect or Spouse from the Matched By drop-down and the employer matching information and ratio automatically appears on the screen. Callers can edit the ratio directly from this screen. If changes are needed, use the Edit button to find a new company or review details for the existing employer match.

The match portion of the summary displays No Matching Company if the option to accept matching gifts has not been turned on.
Matching Gift Database (HEP)
The matching gift database is accessed through the pledge screen or within the Actions menu. If you have purchased a license for HEP, CAMPUSCALL Support will load this information for you.

To find if an employer matches, type in the employer name and click Search.

A listing of any company with that name appears. Select the appropriate radio button and choose Company Detail. This displays two additional screens, Company Information and Matching Requirements.
**Pledge Summary**

The Summary area located at the bottom right side of the pledge screen shows the pledge amount, matching amount and the total combined. Pledge Reasons may be selected from this section, as well as marking a pledge Anonymous.

Once all pledge information has been entered, to continue click **Next**, located at the top of the Specified Pledge screen.

**Note:** Details for all pledges can be viewed on the Pledge report.
No Pledge or Refusal

This result is used to record when a prospect refuses to give a pledge. When the caller clicks the No Pledge result code, the screen shown below appears. Depending on how the project has been setup, the caller may be required to select a refusal reason. Refusal reasons are an indication of why the prospect is choosing not to give money this year. Percentages for each refusal reason can be viewed on the Refusal Reason Summary Report.

You are given a preset group of refusal reasons when CAMPUSCALL is installed, however refusal reasons can be customized specifically to your institution. The caller can fill in any Result or Extended comments, however they are not necessary. Click Save to submit the no pledge information.

Callers can access the No Pledge screen by using the No Pledge option from the Actions menu or by selecting the No Pledge result code from the Completes tab.
Comments

Once you select Save from the Pledge or No Pledge screen you have an opportunity to record any comments. Callers DO NOT have to put comments on every record.

- **Standard Comments** are used to record frequently heard comments by selecting from the drop-down menu. You can use the defaults provided by CAMPUSCALL or you can create your own comments by going to Admin Codes/ Segment Codes.

- **Result Comments** are used to leave notes between callers.

- **Extended Comments** are used to enter any free format comments from the prospect.

- The **Comment Form** option allows you to select multiple comments from a list of comments and added any necessary additional comments.

Following completion of any comments, you should select who you talked with from the Talked With drop-down box. Click Save.

The information entered by callers in Extended or Standard Comments appears on the Comment Form report.

Callers can access the Comment screen by selecting the Comments option from the Actions menu.
Email Responses

Email responses can be generated from CAMPUSCALL based on the project, segment, payment type, result, comment, or refusal code select. From the email screen, the caller will see both caller sendable emails and prospect qualified emails.

Prospect qualified emails are generated and sent automatically to a qualifying prospect. The caller will see all qualified emails at the top of the screen.

When the line containing a qualified email is selected, the caller will see the email body text below. To select the destination email address or make changes to an existing address, select the Edit button next to the email drop-down menu.

If the PS option has been enabled for the email, a PS indicator is displayed on that row. The caller can add PS text once the email has been selected for viewing. If the caller chooses not to add a PS to the email that has the PS option enabled, they should remove the PS letters from the text area.

Caller sendable emails, if available, are listed directly below the prospect qualified emails. The caller must select the destination address for the selected email, if not previously selected.

Again, by selecting the row containing the email they wish to view, the caller will see the body text and PS area if that option is allowed on the selected caller sendable email.
**Email Capture**

Email capture on the Demographic screen is the final step of a Pledge or No Pledge. You have the option to make email capturing a requirement before the caller can move on to the next record. The results of the night’s email capture can then be viewed from the E-mail Detail report.

Make any changes to the email address and select the appropriate result from the drop-down menu. You must select an *Email Status* before you are allowed to save, if email capturing is set to required. Select *Save*.

<table>
<thead>
<tr>
<th>Email Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Captured</td>
<td>An email wasn’t present and the caller obtained one.</td>
</tr>
<tr>
<td>Updated</td>
<td>The current email was incorrect and updated by the caller.</td>
</tr>
<tr>
<td>Verified</td>
<td>The current email was verified to be correct.</td>
</tr>
<tr>
<td>Unverified</td>
<td>The current email was unverified by the caller.</td>
</tr>
<tr>
<td>Not Captured</td>
<td>An email wasn’t present and the caller forgot to ask for one.</td>
</tr>
<tr>
<td>Do Not Have</td>
<td>The prospect didn’t have an email address.</td>
</tr>
<tr>
<td>Refused</td>
<td>The prospect refused to give their email.</td>
</tr>
</tbody>
</table>

**End Session**

At the end of a calling shift use the *End Session* option from the Actions menu. You must submit a result code for the current prospect on your screen before you are logged out of the telemarketing routine. If your role is set to caller, you are directed to the dashboard where historical statistics are displayed. Use the *Logout* button to exit CampusCALL and return to the login screen.

If your role is set to something other than caller, you will have an additional option to Logout of the calling routine without making any changes to the current record on your screen. Logout will remove you from the calling routine and return you to the last application viewed with the CAMPUSCALL Admin routine.
**Administrative Login**

Anyone with an employee role of supervisor or higher is directed to the administrative screen after logging into CAMPUSCALL. The Employee Monitoring application is launched automatically.

To locate an application within CAMPUSCALL, scroll over the Calling Shift, Project Setup, Site Admin and System menus at the top of the screen.

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**Employee Monitoring**

This application allows you to monitor the status of all your callers. It displays who is idle, calling, and on a call (traditionally white, yellow, and green respectively). This screen updates in real time as callers continuously hang up, call, and sit idle. If you have the Idle Warning feature configured in Project Control, the screen will display a fourth color for any caller who has been idle too long.

Information about the employee and their current prospect’s record is displayed on this screen. You can see which project they are calling and what phone number they are calling. To view the employee’s total calling statistics, double click the row for that employee. A pop-up window displays a list of all calls made, including talk time and call time.
Site Admin

Employee Demo

Before you or your callers can log into CAMPUSCALL they must have an employee id and password. From Site Admin select New Employee to start entering your current employees into the system. Remember that the top box is used only to search for employees. It cannot be used to enter new employees.

Use any of the search fields to locate employees within CAMPUSCALL. Search results display only those employees that have the same or lesser role than you. For example, if someone with the role of supervisor searches for All Roles, the search results display all other supervisors and all representatives within CAMPUSCALL. They will not see a record for anyone set as a higher role such as DBA or Manager. The Reset button is used to remove prior search criteria.

If you have upgraded to CAMPUSCALL, all of your callers have been migrated in from your old server. When you click Search, it displays a list of all your current callers. All user passwords have been reset to a generic password. You can change this password if needed from the Security tab in the employee record.

To create a new employee, click New Employee. All required fields will be marked with an asterisk (*).
**Employee Demo continued**

The General tab requires only three things: employee id, first and last name. You may use any of the additional fields for your own purposes.

The Contact tab allows you to enter any contact information you want to keep for this employee. No fields are required.

If you enter an email address, passwords can be emailed to the address for this username. In order to avoid entering email addresses for each caller, use the manager or supervisor’s email. Then if a caller forgets their password, it will be emailed to the manager’s email account.

The employee account defaults to active. When an employee is no longer employed, you can inactivate their account by deselecting the active box.
**Employee Demo continued**

The Status tab requires that you select the role for the employee (callers should be set as Representative). You MUST select the department, supervisor, site, and hire date.

The Miscellaneous tab allows you to enter the major, grad year, and grad semester for the employee. This may be needed if you are going to use want to include this info on your pledge cards.

Once an employee is saved, a fifth tab appears – SECURITY.

The password for the newly created employee is automatically set to their user id. You can reset their password on the security tab. Type the new password in the boxes and click Reset Password.

A user's account can also be locked/unlocked from the Security tab.
**Admin Codes**

**Area Codes**

When CAMPUSCALL is installed, all area codes are added for you, but be sure to check that all local prefixes are also loaded into CAMPUSCALL. To change an existing area code, simply select the appropriate row from the search results. If you need to add a new area code or prefix, click New at the bottom of the screen. Remember that the area at the top is used only as a search tool.

### The area code and prefix are required fields for a new area code. If you are not adding a local prefix then the prefix should be set to '000' which represents all prefixes in that area code. If you are adding a local prefix, enter that area code and local prefix.

### Select the Site to which this area code belongs.

### A description may be entered for the new area code.

### The correct state and time zone must be selected from the drop-down menu.

### Special dialing defines if this area code should be attempted as a local number, without a ‘1’ and the area code. If it is not a local area code, select None from the drop-down menu.

### If the area code is in an area that observes Daylight Savings, select Yes from the drop-down menu.

### Quick skips allows you to stop calling a specific area code or/and prefix for a period of time. You should use Call Blocks instead of quick skips for efficiency.
Campus, Club, Degree, School, & Major Codes

Campus, Club, Degree, School, and Major codes all look and perform the same way. This uses the Major code screen shot as an example.

If you use codes to represent any of this information in your school database, you should have those codes added into CAMPUSCALL so that callers see the description instead of a code. This application allows you to load and maintain codes, short descriptions, and long descriptions. If you have a long list of items that need to be added into CAMPUSCALL, especially club, degree, school, and major codes, you can send this list to CAMPUSCALL Support and they can add it for you.

If you only have a few items that need to be entered, you can add them manually.
- Click New.
- Fill in the code, short and long description. Callers see the long description in the calling routine.
- Click Save.

To view existing code details, enter the search parameters or click Search. Select the code from the list by highlighting it. This brings up the school code details window where is can also be modified.
**Segment Codes**

Segment Codes are used to make the CAMPUSCALL database more efficient. Most can be set to *Optional* or *Required* in Segment Group Control. All code groups types are created and altered in the same way.

Designations are set up through Site Admin/Admin Codes/Designation Codes. These are the designations that the callers see on the pledge screen. If you have a long list that needs to be available, your project manager will add those for you.

If you click *New Designation Codes*, or select an existing code, you are directed to the Designation Codes detail screen. The name field is the code for this designation. Short and Long descriptions can be used. The Long description is what the caller sees in the Telemarketing routine.
**Segment Codes continued**

Refusal reasons are used on the No Pledge screen by the caller to indicate why the prospect is not making a pledge. CAMPUSCALL provides a standard list of refusals but you can add any specific refusals that are applicable to your university. A refusal reasons report can be accessed in Reports Plus.

A refusal reason group can also be created for credit card payment refusals. To create a new refusal group, such as a card refusal group, enter the new name in the New Group box and click the new icon. Once the new group is created, select New Refusal Reason to add new refusal reasons to the group.

**Additional Segment Codes**

- **Standard Comment Codes** appear on the Pledge and No Pledge Screen and can be used by callers to select commonly heard comments made by prospects. You can use the defaults provided by CAMPUSCALL or you can create your own comments by selecting New Standard Comment.

- **Fund Codes** designate a prospect as a member of a certain gift club based on the pledge amount. When the pledge is entered through CAMPUSCALL Telemarketing, the fund is automatically assigned to the prospect.

- **Member Codes** specify a specific membership level based upon the pledge amount and type. When entering the pledge in the CAMPUSCALL Telemarketing Pledge Routine, the membership is selected from a drop-down menu and the pledge amount is automatically populated.

- **Pledge Codes** are used for entering frequently heard pledge reasons when entering a pledge.

- **Organization Codes** designate a prospect as an affiliate of an organization.

- **Contact Restrictions** allow the caller to mark a prospect’s record with a note that the contact should be restricted. In the CAMPUSCALL Telemarketing routine the caller must select an effective date and expiration date. This can be used to make note that the prospect does not wish to be contact during the specified time; however, it does not block the record from being called.
Data Structure

In CAMPUSCALL, data is organized into 3 tiers: Projects, Segment Groups, and Calling Pools. The second tier, Segment Group, contains four levels that form an integral part of the reporting capability within CAMPUSCALL.

⇒ All data is first loaded into a project. For the example above data would be loaded into the FY ANNUAL FUND project.

⇒ The project data must then be split into segment groups. Segment groups for the above project are Current Parents, COB Donors, COB Non Donors, and COE Sybunts. An example of segment group level names is also shown above.

⇒ Each segment group is then typically divided into calling pools. These calling pools are assigned to callers. If a record is not put into a calling pool, it cannot be called. Examples of calling pools above are Current Parent Donors, COB Donors $1-99, COB Donors $100+, COB Non Donors Grad 1990s, and COE Sybunts 2+ years.

Note: You may have several projects each year. Example of projects include: Athletics, Thank You, Reminders, Main Fundraising, 2nd Ask Solicitations, etc. The only restriction for data is that a prospect’s ID cannot exist twice in a project.
Project Setup

Segment Group Control

Segment Group Control is used to define details like segmentation for reporting, segment codes, calling routine options, and to specify the information which must be captured when a prospect is contacted.

From this main Segment Group Control screen, select the correct project from the drop-down menu, or use the search, active, or training boxes to locate your newly created project. All existing, defined segments within this project are listed on this screen.

Segments highlighted in red may not be callable due to bad data or missing required information. Review segment settings for correctness.
Segment Group Control continued
Select a segment to view and the Segment Detail screen appears.

Data breakdown example: You loaded data by school or college and also by the prospect’s last gift date.

Level 1 could be alumni/parent/friend status.

Level 2 could be by school – Business, A&S, Pharmacy, Law, Education, etc.

Level 3 could be by donor type – Lybunt, Sybunt, Long Lapsed Sybunt, or Non Donor.

Level 4 can be the name of the segment again or listed as N/A.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segment Description</td>
<td>The description name can be the same name as the segment group. This description appears on segment group reports and reports with segment group subtotals.</td>
</tr>
<tr>
<td>Group Levels 1-4</td>
<td>Leveling is another way to report on your data. These are sub-groups within the segment group and do not all need to be used. Every segment does need to have different group levels.</td>
</tr>
<tr>
<td>Starting Date</td>
<td>The date entered here is the anticipated start of calling. If you set it to a future date and a caller is accidentally copied into this segment, the system does not allow them to be called.</td>
</tr>
<tr>
<td>Record Count</td>
<td>Displays the number of records loaded into this segment group.</td>
</tr>
<tr>
<td>Active</td>
<td>If a segment is listed as not active, even on the start date, the segment will not be allowed to call.</td>
</tr>
</tbody>
</table>
**Segment Group Control continued**

Here you are able to select the scripts, result codes and designations the segment will access as well as whether the segment will use standard comments and refusal reasons.

<table>
<thead>
<tr>
<th>General</th>
<th>Segment Codes</th>
<th>Telemarketing Options</th>
<th>Payment Options</th>
<th>Manual</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>scripts 3.x</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>result codes group</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>designated gift group</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>standard comments</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>pledge reasons</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>refusal reasons</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>card refusal reasons</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>organization codes</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>survey group</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>fund codes</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>member codes</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **scripts 3.x**
- **result codes group**
- **designated gift group**
- **standard comments**
- **pledge reasons**
- **refusal reasons**
- **card refusal reasons**
- **organization codes**
- **survey group**
- **fund codes**
- **member codes**
Segment Group Control continued
Telemarketing Options tab

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign Type</td>
<td>Either set to Annual or Capital</td>
</tr>
<tr>
<td>Maximum Callback Days/Date</td>
<td>The number of days or a specific date for which CAMPUSCALL allows scheduled callbacks.</td>
</tr>
<tr>
<td>Maximum Rings</td>
<td>The number of rings the system will attempt before moving on to the next prospect.</td>
</tr>
<tr>
<td>Maximum Attempts</td>
<td>The number of times the system tries a prospect before no longer allowing it to be called.</td>
</tr>
<tr>
<td>Maximum Dials</td>
<td>The total number of times all phone numbers may be attempted.</td>
</tr>
<tr>
<td>Allow Callers to View Project/ Their Stats</td>
<td>If checked, allows the caller to view the total project or their own statistics.</td>
</tr>
<tr>
<td>Pre-Survey Refused Result</td>
<td>If using a survey, this allows a refusal reason to be selected without entering the survey.</td>
</tr>
</tbody>
</table>
## Segment Group Control continued

### Payment Options tab

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum/Maximum Pledge Amount</td>
<td>Sets the minimum and maximum pledge amount allowed.</td>
</tr>
<tr>
<td>Default Pledge Amount</td>
<td>Sets the default pledge amount. This is usually $0.</td>
</tr>
<tr>
<td>Maximum Payments</td>
<td>Sets the maximum number of payments allowed for a pledge. This can be set to 1-12 or no max.</td>
</tr>
<tr>
<td>Allow Spouse Designation/Default Desig by/Maximum Desig</td>
<td>Will allow a pledge to be designated by the spouse/default commonly left as prospect/maximum defines the number of designations allowed</td>
</tr>
<tr>
<td>Allow Sustaining Gifts</td>
<td>If checked, callers can mark gift as sustaining (only if payment credit). If enabled, settings for default due dates can be configured.</td>
</tr>
<tr>
<td>Accept Matching Gifts, Use Matching Factor/Code</td>
<td>Gives the option to enter matching gift in pledge screen. Check all secondary boxes if HEP is being used.</td>
</tr>
<tr>
<td>Credit Cards Accepted</td>
<td>Specify accepted credit cards. Define if a password is needed for credit cards and delayed payments.</td>
</tr>
<tr>
<td>Accept EFT/Capture Bank Information</td>
<td>Specifies that EFT is accepted. Can also indicate if bank account information should be captured.</td>
</tr>
<tr>
<td>First Payment Option – Days, Range or Date</td>
<td>If set to days, determine the number of days out the first payment is due. If set to range, allows three different payment due dates depending on the entry date. If date, define a specific due date.</td>
</tr>
<tr>
<td>Apply to credit card &amp; EFT</td>
<td>If checked, the due date will not change when payment type is changed to Credit or EFT. If unchecked, due date defaults to the current date.</td>
</tr>
<tr>
<td>Last Payment Option</td>
<td>The last date for which pledge payments may be scheduled. No date specified means there is no limitation.</td>
</tr>
</tbody>
</table>
Segment Group Control continued
Mailing Options and Additional Options

Mailing options control how the address on your pledge packets will print and whether a business address can be used. Selecting mail business does not make it the default address; it simply gives the caller the option to select it as the mailing address.

You should also choose Build Mailing Name which can include Prefix, Suffix, or Middle Name/Initial. This ensures changes to demographic information are included on the mailing label.

This tab also enables you to select the formatting of the Mail Both option. If a caller selects to mail the pledge letter to both prospect and spouse, the format you choose here is displayed on the callers screen. This does not make it the default name.

Additional Options is used to indicate whether you want the callers to be required to capture email addresses and if you want the callers to use the extended comment option.

Contact restrictions and segment values are not used.
**Segmentation Maintenance**

If you loaded large files that need to be broken down into segments, Segmentation Maintenance was completed by your project manager to create your segments. To view all completed segmentation, select the correct project from the drop-down menu at the top of the screen. Then locate the segment row you need to review. The Segmentation Maintenance icon is on the right side of that row.

### Segmentation Maintenance - Alumni Nons

<table>
<thead>
<tr>
<th>Segment</th>
<th>Description</th>
<th>Group 1</th>
<th>Group 2</th>
<th>Group 3</th>
<th>Group 4</th>
<th>Active</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni</td>
<td>Alumni Donors</td>
<td>Alumni</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>Yes</td>
<td>917</td>
</tr>
<tr>
<td>Alumni Nons</td>
<td>Alumni Non Donors</td>
<td>Alumni</td>
<td>Non Donors</td>
<td>NA</td>
<td>Yes</td>
<td>962</td>
<td></td>
</tr>
</tbody>
</table>

Segments highlighted in red may not be callable due to bad data or missing required information. Review segment settings for correctness.

3,818 of 3,818 prospect(s) are in valid segments.

**Advanced Options**

Segmentation Maintenance is used to define the criteria CAMPUSCALL will use to segment your data. You do this by selecting the Table, Column, Logic, Value, and Conjunctions. The information available in these drop-down menus is pulled from the data that you provided.
**Calling Pool Maintenance**

Once your data has been segmented, each segment is also put into calling pools by your project manager. If a record is not put into a calling pool, it is not callable. Calling pool maintenance is used to divide your segments in smaller calling groups. Calling pools are flexible, unlike segments, and can be changed throughout the year. Make sure the correct project is selected in the Project Search drop-down box at the top of the screen before searching for calling pools.

Batch Actions can be used to define the default phone number of list of available phones for each calling pool. This will be defined by your project manager but can be adjusted at any time. **Phone Order Setup** allows you to determine the calling order of all loaded phone numbers for the prospect and their spouse. Use the arrows to move the phone types to the Selected box in the order you want them displayed (or called when using Telesense).

Then click **Apply to Selected Pools** to save the calling order for the chosen calling pool.
**Telesense**

**Calling Pool Maintenance Setup**

Telesense is a feature in CAMPUSCALL that allows callers to call through each of the available phone numbers for a given prospect while assigning result codes to each phone number. As “bad” or unreachable phone numbers are encountered, they are marked and future attempts will exclude those numbers from being attempted. Calling Pool Maintenance allows users to enable Telesense by calling pool and specify which phone numbers should be included in the looped calling.

To setup pools for use with Telesense, select the calling pools you want to apply the phone order to by checking the box on the right side of the screen or using the Select All option, then click **Batch Actions** and select **Phone Order Setup**. Check the **Use Telesense** box and click and drag the available phone numbers that you’d like to attempt over to the selected box, then click Save. This is the order in which Telesense will attempt the prospect’s numbers. Phone numbers not selected will not be included in calling sequence. Once a phone order is defined and saved it will be applied to all selected Calling Pools. Changes will occur immediately.

![Phone Order Setup](image)

**Note:** If Telesense is not being used, the first phone selected is the default phone.
**Telesense continued**

**Valid vs. Invalid**

When a phone number is attempted it will be labeled as either Valid or Invalid. A Valid phone number means that it was a working phone number and it will be attempted in subsequent attempts on that record. An example of a Valid phone number would be a No Answer. If a record is labeled as Invalid then it will not be attempted on any subsequent attempts on that record. An example of an Invalid phone number would be a disconnected number.

**Non Active Telesense Result Codes**

These result codes are inactive but essential for Telesense to work properly.

*DIAL_NVP (No Valid Phones)* is designed to code a record as not callable once all loaded phones for that record have been labeled Invalid. For example, there are two phone numbers loaded for a prospect, one is coded as a Disconnect and one is coded as a Wrong Number, that record would get coded as No Valid Phones and it would not be attempted again.

*DIAL_INRPT (Dial Interrupted)* is designed for when the set phone order is not completed. If the caller does not let the phone order cycle through as it was setup, the Dial Interrupted status will be applied to that record. This may happen if a caller calls the home phone number and the person tells the caller to call him at work, but the next phone number in the phone order was the prospect’s cell phone.


**Giving Profiles**

The Giving Profiles application allows you to setup immediate processing for credit cards through a selected vendor website. The main benefit to using OGI is for PCI security compliance; Credit card numbers will no longer be stored on the CAMPUSCALL server. Once the OGI has been setup and assigned to a project, the vendor’s website will be available in the pledge routine allowing callers to process credit cards immediately.

To access the Online Giving Integration (OGI) module, select **Giving Profiles** from the **Project Setup** menu at the top of your screen. The Giving Profile Search window is opened.

All available profiles for your site appear on the OGI Profile page. To edit an existing profile, click the row that contains your profile. This takes you to the OGI Profile Detail page where you can make any necessary changes.

**Note:** If an OGI Profile has already been created for your site, you do not have to change any settings within this screen.

**Available vendors include:**

- Authorize.NET
- Beanstream
- Blackbaud (Merchant Services through Payment Services)
- CASHNet
- CyberSource
- Higher One
- IATS
- Moneris
- PayPal Link
- PayPal Payflow Pro
- QuikPay
- Sage ExpressPay
- TouchNet
- World Pay
**Creating a New Giving Profile**

To create a new giving profile, use the *New Profile* drop-down menu. The list of profiles represents the default online giving vendors that CAMPUSCALL supports and they are installed up front to give you the flexibility of changing your online giving vendor at any time. If your vendor is not in the New Profile list, select the *Custom* profile option. Required fields are marked with a red asterisk (*). The required fields depend on the vendor selected.

The top portion of the Profile Details page is common for all vendors.

### Profile Details

1. **Name** - This is the name of your profile. This allows you to identify different profile set-ups.
2. **URL** - This is the URL of the vendor. Some profiles default to the necessary URL while other will need to be supplied by your vendor. This is the URL CAMPUSCALL needs to connect to the vendor’s online credit card processing website.
3. **Description** - Filling this field is optional; use this field to describe the profile.
4. **HTTP Method** - Modes in which a browser can send information to the server. The HTTP method is defaulted to the correct setting unless specified by the vendor.
   - **POST** - Post hides the data it is sending and the most common option used because it is slightly more secure. POST does not have a data limit.
   - **GET** - Occurs behind the scenes when you click on a link and it shows the data in the address bar. Usually used when a client uses a custom link that does not support the POST method
5. **Client** - This may be used if different Clients use the same server. For SaaS clients, use a different profile for each client and to differentiate, select the correct Client from the drop-down.
6. **Preview** - The preview button allows you to see what values will be sent to the Vendor. Select a Project and Prospect, and all values from the Fields to Vendor tab are displayed.
7. **Debug** - When the Debug checkbox is selected, the specific parameters being sent to the Vendor will be displayed in the Online Routine on the “Forwarding to <VENDOR>” popup. This allows you to identify if the correct values are being sent to the Vendor.
Giving Profiles continued

Each vendor profile has the following four tabs. These tabs allow you to define the way data is submitted to and from the vendor; any of the fields can be edited.

1. Fields to Vendor - These fields are the available mappings that CAMPUSCALL may send to the Vendor. Only the fields that have a red asterisk are the ones required for CAMPUSCALL OGI use. Otherwise, the fields are optional.
2. Fields from Vendor - These are mappings that get returned to CAMPUSCALL from the vendor. Typically, this data shows the results of the credit card processing. These will only be populated if the vendor actually sends data back to CAMPUSCALL.
3. Lookup Values - The lookup values tab(s) are for instances where the value in CAMPUSCALL needs to be “translated” to the vendor. For example, payment frequency “1” means annual in CAMPUSCALL but the Vendor might need to receive “ANNUAL”.
4. Frequencies - The frequencies tab defines the recurring payments the vendor may accept.

Required Fields by Profile

Authorize.NET
- 1. URL (https://secure.authorize.net/gateway/transact.dll)
- 2. x_login
- 3. x_tran_key
- 4. x_fp_hash
   - Change from: ![HMAC("******** + "^" + prospect_base.id_number + "^" + int(time() / 1000) + "^" + pledge_payment[1].payment_amount + "^")]
   - To: ![HMAC("key here", "x_login here" + "^" + prospect_base.id_number + "^" + int(time() / 1000) + "^" + pledge_payment[1].payment_amount + "^")]

   *Authorize.Net does **not** support recurring gifts.

Beanstream
- 1. merchant_id

Blackbaud (Connect through Payment Services)
- 1. Payment Services Username
- 2. Payment Services Password
- 3. MerchantAccountId – Select Merchant Services, if applicable

*Blackbaud supports recurring gifts.

CASHNet (eMarket Required)
- 1. URL - format should be https://commerce.cashnet.com/***merchant code***
- 2. itemcode1- matched to site, defaulted to CAMPUSCALL but can be changed if needed.

*CASHNet does not support recurring gifts.
<table>
<thead>
<tr>
<th>Method</th>
<th>URL 1</th>
<th>URL 2</th>
<th>URL 3</th>
<th>URL 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CyberSource</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IATS</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Moneris</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PayPal Link</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PayPal Payflow Pro</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>QuikPay</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom (commonly used to route callers to the institution’s online giving page)

1. URL

CyberSource (Create CyberSource HOP file to locate necessary profile entries)

1. URL
2. key
3. merchantID
4. serialNumber

*CyberSource supports recurring gifts.

IATS (Subaccount needed for each calling station)

1. AgentCode as ![station_master.logo_file]
2. Password
3. Update LOGO_FILE in MAIN.STATION_MASTER for each active calling station. This is the value that will be passed into the IATS interface as the AgentCode for authentication

*IATS supports recurring gifts.

Moneris

1. URL
2. hpp_key
3. ps_store_id

*Moneris supports recurring gifts.

PayPal Link

1. URL
2. LOGIN
3. PARTNER

*PayPal Link supports recurring gifts.

PayPal Payflow Pro

1. USER
2. PWD
3. VENDOR
4. PARTNER

*PayPal Payflow Pro supports recurring gifts.

QuikPay

1. URL
<table>
<thead>
<tr>
<th><strong>Sage Vault</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. URL</strong></td>
<td></td>
</tr>
<tr>
<td><strong>2. M_id</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Higher One</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. URL</strong></td>
<td></td>
</tr>
<tr>
<td><em>Higher One supports recurring gifts.</em></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>TouchNet (TouchNet 6 Required)</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. URL</strong></td>
<td></td>
</tr>
<tr>
<td><strong>2. username</strong></td>
<td></td>
</tr>
<tr>
<td><strong>3. password</strong></td>
<td></td>
</tr>
<tr>
<td><strong>4. UPAY_SITE_ID</strong></td>
<td></td>
</tr>
<tr>
<td><strong>5. webServiceUrl</strong></td>
<td></td>
</tr>
<tr>
<td><em>TouchNet supports recurring gifts.</em></td>
<td></td>
</tr>
</tbody>
</table>

Clients may only use TouchNET 6 which requires the following links to be in place, and a username and password to authenticate.

- Return Link URL:            http://<CAMPUSCALLservername>/ccall/OGIResponse
- Error Link URL:             http://<CAMPUSCALLservername>/ccall/OGIResponse
- Cancel Link URL:            http://<CAMPUSCALLservername>/pages/online/ogi/Cancel.jsp

<table>
<thead>
<tr>
<th><strong>World Pay</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. URL</strong></td>
<td></td>
</tr>
<tr>
<td><strong>2. accId1</strong></td>
<td></td>
</tr>
<tr>
<td><strong>3. instId</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Using Online Giving</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>In the Pledge screen, after entering the pledge amount, designations and frequency, select the payment type. Select the Credit type and a payment options box appears. Click the text to Launch &lt;OGIVendorPage&gt;. The clickable button label will vary depending on the vendor being used.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Payment Type</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Launch: TouchNet</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Transaction Status:</strong></td>
<td>Choose a status</td>
</tr>
</tbody>
</table>

Upon selecting the Launch button, the OGI page of your vendor appears in a different window and you process the credit card on that page by entering the credit card information. A confirmation page will appear after the credit card information is submitted. Once submitted, close the pop-up window and mark the transaction status in CAMPUSCALL. The Transaction Status options are: Success, Failure and Not Attempted. Then finish the call.
**Basic Workflow**
The process for payments follows the basic workflow shown here. Caller work stations MUST be able to access the vendor’s URL.

### Issue or Error

<table>
<thead>
<tr>
<th>Issue or Error</th>
<th>Caller Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website is unavailable</td>
<td>1. Follow the “write down” procedure.</td>
</tr>
<tr>
<td></td>
<td>2. Mark the credit card transaction as a failure.</td>
</tr>
</tbody>
</table>
| Data pre-population is incorrect| 1. Retry connection to the vendor’s website:  
                            a. Verify the Pledge Amount, Designation(s), and Frequency are correct.  
                            b. Click process payment which will re-open the vendor’s website.  
                            c. Verify the data is correct. If not, use option 2.                                                                                                                                 |
|                                | 2. Change the payment type to check.                                                                                                                                                     |
| Credit card transaction is declined | 1. Attempt the same transaction again.                                                                                                                                                  |
|                                | 2. Ask for another credit card to try.                                                                                                                                                   |
|                                | 3. Mark the transaction as a failure or change the payment type to check.                                                                                                              |
Scripts

There are two main steps in using the scripts feature within CAMPUSCALL: creating scripts and grouping scripts together. The first tab, Script Search, is used to create new scripts or search for existing scripts. Before you begin, be sure the correct project is selected from the project drop-down menu. To search for any existing script within the selected project, use the Script Name and/or Script Type boxes and click Search. To create a new script, click the New Script button.

Begin by naming the new script. The Script Name is what callers see within the Telemarketing Routine. Next, select the Type. These types, or categories, separate the scripts within the Telemarketing Routine so the callers select to view just the scripts of a specific type.
**Scripts continued**

Once a Script Name and Type have been determined, you can begin creating the body for the script.

If your scripts are saved electronically, you can copy and paste an existing script and most formatting from Word will also copy into the Script Editor.

Use the menu toolbars to update the script with any necessary formatting changes.
**Scripts continued**

When creating a script, it may be necessary to include links to enable easy navigation to different areas of the script. These links are created by adding anchors and links to the script.

- From the edit script window, begin by placing the cursor at the location for the first link.
- Select the Anchor toolbar icon.
- The anchor properties window appears. Enter the anchor name and click OK.
- A red flag is now added to the script.
- Next, highlight the text that the caller will click to move to the anchor in the script.
- Select the Link toolbar icon.
- Then select the Link Type drop-down menu and select Link to anchor in the text. From the Select an anchor by Anchor Name drop-down menu, locate the anchor name you defined previously. Click OK.
- The selected text is now a hyperlink, shown in blue text.
Scripts continued

Within your script you may want to insert database fields from you data. You can pre-populate the name of the prospect, grad year, amount of last gift, etc. for the caller to see within the script. This feature is accessed through the Merge Field button.

Click the New Field button to open the editor and create the merge field. Commonly used Merge Fields can be found in the Category drop down.

Pick the category of the merge field you would like to insert and click the Insert button to add it to the script.

Click Save once you have completed writing/copying your script into CAMPUSCALL.

To preview what it will look like for the caller, click Preview to expand that window.
**Scripts continued**

**Reusable Merge Fields**

Re-usable merge fields are created in the same manner as regular merge fields except that they are assigned a category and saved for future use. A saved change to a re-usable merge field is propagated to all uses of that merge field.

There are system re-usable merge fields and user-definable re-usable merge fields. The system re-usable merge fields don't have a client and therefore are accessible across all users and projects, but aren't editable. User-definable re-usable merge fields are assigned a client, so they are client-specific, and are editable. Users can create user-definable re-usable merge fields under a system category, but it will be assigned a client.

Because of their re-usable nature and the potential for many uses, it is recommended that merge fields be organized into categories for ease of use. Click the **Edit Categories** button to bring up a new page where the re-usable merge field categories can be edited.

Use the **Search** box to filter the categories.

Click the **New** button to create a new category.

To delete a category, click the trash can button. Deleting a category will delete all merge fields assigned to the category. The user will be prompted with a warning, first. There is no check on whether the merge field is implemented anywhere before deleting the re-usable merge field. If there is a reference to a deleted re-usable merge field in a script or configuration field, the output of the merged text will tell the user that the merge field could not be processed.
**Script Functions**

Script functions are available within the Merge Field option. These functions allow you to customize how data will be displayed from your database. Every function should include @COL which passes the data from the specified column.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUBSTR (@COL, Starting Position, Ending Position)</td>
<td>Returns the desired number of characters from the specified starting position.</td>
<td>@LAST_GRAD!MAJOR:SUBSTR(@COL, 1, 3) --Returns: Bio if the prospect’s last major is Biology. @PROSPECT_BASE!FIRST_NAME:SUBSTR(@COL,1,1). @PROSPECT_BASE!LAST_NAME:SUBSTR(@COL,1,1). --Returns: J.S. if the prospect’s first name is John and last name is Smith.</td>
</tr>
<tr>
<td>FORMAT (@COL, Format)</td>
<td>Defines the format for numbers, dates, or times.</td>
<td>@LAST_GIFT!GIFT_DATE:FORMAT(@COL, 'MMM-dd-yyyy') --Returns: FEB-28-2009 @LAST_GIFT!GIFT_AMOUNT:FORMAT(@COL, currency) --Returns: $100.00</td>
</tr>
<tr>
<td>LEFT (@COL, Position from Left)</td>
<td>Returns x number of characters from the start of a string.</td>
<td>@PROSPECT_BASE!USER_FLD1:LEFT(@COL, 4) --Returns: Arts if Arts &amp; Sciences is loaded in USER_FLD1.</td>
</tr>
<tr>
<td>RIGHT (@COL, Position from Right)</td>
<td>Returns x number of characters from the end of a string.</td>
<td>@PROSPECT_BASE!USER_FLD1:LEFT(@COL, 8) --Returns: Sciences if Arts &amp; Sciences is loaded in USER_FLD1.</td>
</tr>
<tr>
<td>PADL (Total Length, Padding Characters, @COL)</td>
<td>Pads the specified column with the desired character to the left.</td>
<td>@PROSPECT_BASE!PRIMARY_GRAD_YEAR:PADL(4, 19, @COL) --Returns: 1999 if the grad year was loaded as two digits only (99).</td>
</tr>
<tr>
<td>PADR (Total Length, Padding Characters, @COL)</td>
<td>Pads the specified column with the desired character to the right.</td>
<td>@LAST_GIFT!GIFT_AMOUNT:PADR(6, .00, @COL) --Returns: 100.00-999.00 if the last gift amount is 3 digits between 100-999.</td>
</tr>
<tr>
<td>UCASE (@COL)</td>
<td>Returns data in all upper-case.</td>
<td>@PROSPECT_BASE!FIRST_NAME:UCASE(@COL) --Returns: JOHN if the prospect's first name is John.</td>
</tr>
<tr>
<td>TRIM (@COL)</td>
<td>Returns data without leading or trailing spaces.</td>
<td>@PROSPECT_BASE!ADDRESS1:TRIM(@COL) --Returns: '123 Main St' instead of ‘123 Main St '</td>
</tr>
<tr>
<td>LENGTH (@COL)</td>
<td>Returns the length of the specified field.</td>
<td>@PROSPECT_BASE!FIRST_NAME:LENGTH(@COL) --Returns: 4 if the prospect’s first name is John.</td>
</tr>
<tr>
<td>REVERSE (@COL)</td>
<td>Reverses the data within a specified column.</td>
<td>@LAST_GIFT!GIFT_AMOUNT:REVERSE(@COL) --Returns: ‘nhoj’ if the prospect’s first name is John.</td>
</tr>
<tr>
<td>MID (@COL, Starting Position, Length)</td>
<td>Returns the specified number of characters from the data field.</td>
<td>@PROSPECT_BASE!ZIP:MID(1,5) --Returns: 12345 if the prospect’s zip code is available.</td>
</tr>
<tr>
<td>IIF (@COL Expression, True Part, False Part)</td>
<td>Evaluates the statement and if true, it returns the true portion, otherwise it returns the false portion.</td>
<td>@LAST_GIFT!GIFT_AMOUNT(IIF(@COL&gt;499.99, 1000, 500)} --Returns: 500 if last gift is &lt; 499.99, and 1000 if &gt; 499.99.</td>
</tr>
</tbody>
</table>
## Script Functions continued

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
<th>Examples</th>
</tr>
</thead>
</table>
| **ADD** (@COL, value 2) | Adds value 1 to value 2. | [@LAST_GIFT!GIFT_AMOUNT:ADD(@COL, 100)]
|              |                                          | --Returns: 150 if the last gift was 50.                                   |
| **SUB** (@COL, value 2) | Subtracts value 1 by value 2. | [@LAST_GIFT!GIFT_AMOUNT:SUB(@COL, 10)]
|              |                                          | --Returns: 40 if last gift was 50.                                        |
| **MULT** (@COL, value 2) | Multiples value 1 by value 2. | [@LAST_GIFT!GIFT_AMOUNT:MULT(@COL,3)]
|              |                                          | --Returns: 150 if last gift was 50.                                        |
| **DIV** (@COL, value 2) | Divides value 1 by value 2. | [@LAST_GIFT!GIFT_AMOUNT:DIV(@COL, 2)]
|              |                                          | --Returns: 25 if last gift was 50.                                         |
| **MOD** (@COL, value 2) | Returns the remainder of value 1 divided by value 2. | [@LAST_GIFT!GIFT_AMOUNT:MOD(@COL,10)]
|              |                                          | --Returns: 5 if last gift was 50.                                          |

### Compound Function Statement Examples

| Dynamic Ask Amount Calculation and Formatting (IIF & FORMAT) | [@LAST_GIFT!GIFT_AMOUNT:FORMAT(IIF(@COL>499.99, MULT(@COL, 2), 500), currency)]
|                                                            | --Returns: $500 is last gift is <499.99 and multiplies last gift by 2 if >499.99. |
| Standard Ask Amount Calculation (MULT & FORMAT)           | [@LAST_GIFT!GIFT_AMOUNT:FORMAT(MULT(@COL,3),currency)]
|                                                            | --Returns: $150 if last gift was 50.                                       |
| Formatting Zip Codes (IIF)                                | IIF(LENGTH(@COL) = 6, CCAT(LEFT(@COL, 3), ' ', RIGHT(@COL, 3)), IIF(LENGTH(@COL) = 9, CCAT(LEFT(@COL, 5), ' - ', RIGHT(@COL, 4), ' ')))
|                                                            | --Returns: nnn nnn if 6 digits (Canadian) and nnnnn-nnnnn if 9 digits (US). |
| Formatting Grad Year (MOD & FORMAT)                       | [@LAST_GRAD.GRAD_YEAR:FORMAT(MOD(YEAR(@COL),100), '00')]\
|                                                            | --Returns: 99 if grad year was loaded as 05/01/1999.                        |
Scripts continued

If you have merge fields for prospect specific information, use the Preview tab to populate the fields into the script.

When you select the tab you are directed to a search screen where a Project and a Prospect may be selected to preview. Use any criteria to identify a prospect and click select prospect. Once a prospect has been selected, you return to the preview screen using the data from the selected prospect.

Thank you for your gift of $100.0.

Is your address still 65 Kirkwood North Road SW65 Kirkwood North Road SWCedar Rapids, IA 52406?

To return to the main Script screen, click the ‘X’ icon at the top of the preview script screen.
Scripts continued

Once all of your scripts have been created, move to the Script Group Search tab. This tab allows you to create Script Groups or edit existing Script Groups. A group is a collection of scripts that is assigned to a segment in Segment Group Control. When a segment is assigned a specific group, the only scripts that can be viewed on the caller's screen are the scripts that have been saved in that particular group. One script group can be assigned to all segments.

If you are calling for each college on campus, you can have one group for each college. For example, you would have a group titled Business that would get assigned to all Business segments. When a caller was assigned to business records, the only scripts that would appear on their screen would pertain to the College of Business.

Click New Group.

Begin with a name. If you are going to have multiple groups (one for each college) then the name of each group would be the college name. You may use the Description box for any additional notes about the new group.
Scripts continued
Next, select which segments you want this new group to be assigned. All segments appear in the Available Segments box on the left. Use the arrow buttons to move any segment or all segments into the Assigned Segments box. In this example, the Donors segment is selected.

Then select which scripts should be assigned to the selected segments. All available scripts appear in the Available Scripts box on the left. Use the arrow buttons to move any script or all scripts into the Assigned Scripts box. In this example, the Donor Ask, Standard Jones, and Close if Pledge scripts are selected.

Note: The scripts within each type folder are displayed for the callers in the scripts drop-down menu in alphabetical order.

Once all segments and scripts have been selected for the new Script Group, click Save. This returns you to the main Scripts screen.

You have now created scripts, organized those scripts into groups and assigned those groups to your available segments.
Email Admin

The Email Admin application allows you to create emails which will be sent to prospects once a specific result is entered in the calling routine.

To locate an existing email, use the Email Name search field, click Search and select the email you need to edit from the displayed results.

The existing settings for the selected email are displayed from the email detail screen. The fields or contents of the email can be changed at any time. If changes are made to the email details be sure to select Save at the bottom of the window.
Email Admin continued
If creating a new email, define the email details and content. Use the text editor options to create the desired email to be sent to prospects. Merge fields and images can also be added to create a more personalized email.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name or description for this email.</td>
</tr>
<tr>
<td>From</td>
<td>The address that this email will appear to be from when sent to a prospect.</td>
</tr>
<tr>
<td>Personal</td>
<td>This allows the user to put a “friendly” tag on an email so it appears to come from a personal name, rather than an email address.</td>
</tr>
<tr>
<td>CC/BCC/Reply To</td>
<td>If the email should be sent to additional addresses, enter a CC and/or BCC here. As a default, if no Reply To is entered, replies will be sent to the From email address. If a different address is needed, enter that in the Reply To line.</td>
</tr>
<tr>
<td>Subject</td>
<td>The subject line for the email.</td>
</tr>
<tr>
<td>Send Type</td>
<td>Select as Automatic or Caller. This indicates whether the email will automatically be triggered to send based on the result of call, or if the caller will need to select it from a drop-down to be sent.</td>
</tr>
<tr>
<td>Approval Type</td>
<td>Choose from All, No Approval Required, or Those With Changes. This marks whether the email will appear in the managers Email Approval queue before being sent. If All is selected, all emails will require approval before being sent. No Approval Required indicates that all emails will be sent without approval. And Those With Changes means that only emails with changes made (i.e. P.S. text has been added) will need approval prior to sending.</td>
</tr>
<tr>
<td>Server</td>
<td>Select the correct email server from which this email should be sent.</td>
</tr>
<tr>
<td>Allow PS?</td>
<td>If you wish to allow callers the ability to add P.S. text to the emails, check this box.</td>
</tr>
</tbody>
</table>
Email Admin continued

Fields may be merged into an email just as they can be when creating scripts. Click the Merge Fields button to view all options.

Merge Fields function the same as they do in Scripts. Individual merge fields can be added, or saved reusable merge fields may be included.
Email Admin continued

Selection Criteria must be created to define what records will be eligible to receive an email. To do this, click on the Selection Criteria tab and build the desired criteria for the email as if you were building criteria for a calling pool.
**Callblocks**

This feature is used to block specific prospects in your project from being called. You can block area codes, zip codes, segments, calling pools, last names, id #, states, etc. This functions exactly like Calling Pool and Segmentation Maintenance. Be sure that the project name drop-down box at the top is set to the correct project.

A list of blocks already created will appear once a project has been selected. To create a new block, click **New**.

In the Callblock Detail window, enter the name and description for this new Callblock. Then, build the criteria that will indicate to CAMPUSCALL which records are to be blocked. In this example, the state of Iowa was blocked. Click **Save**.
**Callblocks continued**

If you are ready to run this block, click *Save and Run*. The screen updates and you will see your newly created Callblock, the date it was created, the date it ran, and the number of records now being blocked. In the second example, 301 records are being blocked however 305 total records match this criterion.

When it is safe to call these records, check the box for the desired Callblock and select *Batch Actions*. A drop-down menu appears giving you the option to clear the selected Callblock.

There are multiple options in the Batch Actions drop down.  
- Copy to Project allows you to copy this Callblock to another project. **You will still need to go into that project’s Callblocks and run the block to implement it.**  
- Run processes the Callblock.  
- Clear releases any records being blocked so they are available for calling again.  
- Delete completely removes the selected Callblock from the project and releases any records.
**Manage Prospects**

Manage Prospects allows you to manually add prospects into the database or add additional information to existing prospects already in the database. Make sure that the project name drop-down box at the top of the screen is set to the correct project.

The search boxes are used to locate any existing prospect. Use any of the criteria boxes to locate a prospect and click **Search**. Once the prospect has been located, select that row to enter the prospect record.

You are directed to the Prospect Detail screen. Here you can edit any of the information for the Prospect/Spouse or add additional information, such as gift history, education or children information. If the segment or calling pool drop-down is left blank, the prospect will be removed from any existing segment or calling pool.

Once all information has been edited or added, click **Save**. If no changes are needed, click **Cancel**.
Manage Prospects continued

If the prospect does not already exist in the database, click New Prospect from the main Manage Prospects screen. This provides you with the opportunity to enter the prospect’s information.

All new prospects must have the following fields (which are usually obtained from your development database) populated:

- The ID Number of the prospect.
- The segment this record will be added to.
- The calling pool to which this record will be added.
- The name for the prospect.
- A home phone number.
Remove Prospect

This feature allows you to search for specific prospects by any field on the Select Prospect tab or upload a text file of ID numbers into CAMPUSCALL to be marked as deleted. These prospects will not be completely deleted out of the CAMPUSCALL database; they are simply marked deleted and can no longer be called. It's important that the file you upload is a text file, not comma separated.

When you upload your id numbers to be deleted, if CAMPUSCALL finds any of them as a completed result code, it will skip over them.

Remember to make sure that the project name drop-down box at the top of the screen is set to the correct project.

Select whether the file of IDs to upload represent the ID Number or the Interface ID Number.

Browse for the text file of IDs that you have saved on your computer.

Select Process. This directs you to the detail screen for Remove Prospect.

The next window allows you select specific segments, sources, or sol codes from which to delete prospects. The number of records to be processed is listed at the bottom and displays if there are any duplicate ID numbers in the uploaded file. To continue the delete process, click Remove.

Finally, a window appears displaying exactly how many records will be marked deleted and their current status within CAMPUSCALL. If the record count appears to be correct, confirm the deletion of the selected prospects by clicking Remove. If changes need to be made, click Cancel.
**Remove Prospect continued**

To delete an individual prospect, use the Select Prospect tab. From this tab, enter the ID number, phone or name to locate the desired prospect. All search results will display below.

![Remove Prospect](image)

Prospects which have been completed are highlighted red; those prospects that are still incomplete or not attempted are highlighted green. Only incomplete records can be deleted.

Select the appropriate prospect and the following confirmation window appears.

![Remove Prospect Confirm Counts](image)

If this information is correct, select *Remove*.

If changes need to be made, click *Cancel*. 
Calling Shift

**Calling Assignments**

Calling Assignments are used to assign calling pools to callers for the night’s shift. You can assign pools to one caller and then copy the same pools to the rest of your employees. When you launch Calling Assignments, the role is defaulted to Representative and a list of all active employees appears in the drop-down menu. To locate a specific employee, begin typing the name of the caller in the employee information box and use the Search button to generate a list of all matching employees. Select the caller’s name to which you need to add calling pools.

Once a caller has been selected, the bottom of the screen displays their current calling assignments.
**Calling Assignments continued**

To add assignments to a caller, select the correct project, select the pool from the drop-down menu and click *Add/Update Assignments*. A caller can call in multiple calling pools and projects during the night’s shift.

There are two ways to add calling assignments to a caller: *Add a Single Pool* or *Add Multiple Pools*.

To add a single pool to a caller, simply select the correct pool name from the drop-down menu and click *Add/Update Assignment*. A caller can call in multiple calling pools and projects during the calling shift.

Next to each calling pool is a number in parenthesis. This number represents the total number of available records within that calling pool. Available records exclude any record that is blocked or that has reached its maximum attempt limit. For a more detailed count, run Calling Pool Counts Report.

To add multiple pools to a caller, select the *Add Multiple Pools* icon.

The following screen appears:

All available calling pools are displayed on the left side. To select multiple pools, hold down the Ctrl key while selecting pools, and click the single arrow to move the pools into the box on the right. Double clicking a pool also moves it into the box on the right.

To add all the calling pools to a caller’s list of assignments, simply click the double arrow.
Calling Assignments continued

The order that you see calling pools listed is the order in which the caller attempts these pools. If you don't want one of the pools called tonight, check the box next to the pool and select Delete.

Calling Assignments can also be re-sequenced. Simply click and drag the calling assignment pool to the correct order.

In addition to being able to add calling pools to a caller, you can also copy their calling assignments to other callers.

Check the box/boxes beside the pools that need to be copied.

If you want to copy all the pools, check the top box. Then click Copy.

Once the Copy box appears, use any of the search fields to identify specific callers. In this example, the role of Representative has been selected. All Representatives appear in the Available box below. Select the names that you want to copy to and use the arrow buttons to select them individually or all at once. Selected employees appear on the right side.

Once you have selected the employees you want to copy to, click Save.

To copy to all employees, simply click the double arrow.

Once you have copied calling pools to additional callers, a message window will appear outlining which pools were copied to each caller along with the calling zone and stop time.
Calling Assignments continued

You are also able to edit any calling pool assigned to a caller. Simply click on the pool you need to edit and it appears on the right side of the screen in the Calling Pool Detail section. Here you can edit the time zone, stop time, minimum attempts or select a new pool.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Autodial – Callbacks/Calling</td>
<td>Allows CAMPUSCALL to automatically attempt the next record or callback as soon as the previous record is coded. You should leave this set to Yes for all callers unless you are training new callers.</td>
</tr>
<tr>
<td>Minimum Attempts</td>
<td>If set to 0 attempts, CAMPUSCALL first attempts any record that has never been attempted within each calling pool. Once there are no more records that have 0 attempts, it searches for records with only 1 attempt, etc.</td>
</tr>
<tr>
<td>Call Zone</td>
<td>This refers to time zones. You can assign all zones or just 1 zone within a calling pool. If you have only Zone 2 selected, CAMPUSCALL searches within each calling pool for records in the Central Time Zone. Once the caller runs out of records in this zone, they will automatically be moved into the next calling pool assigned. If there are no more calling pools assigned to the caller, they will be kicked out of CAMPUSCALL.</td>
</tr>
<tr>
<td>Stop Time</td>
<td>Stop time refers to the time when CAMPUSCALL will no longer allow this zone to be called and it forces the caller into the next assigned calling pool.</td>
</tr>
</tbody>
</table>
**Online Telemarketing**

Online Telemarketing allows you to search for a specific prospect or view any record in a calling pool. It contains four separate applications: *Start Calling Pool, Call Prospect, Prospect Maintenance, and Change Demographics.*

Use the drop-down menu to select the project. If you do not see your project in the drop-down menu, you can begin typing the name of the project in the search box and use the magnifying glass to locate the project.

The most frequent use of Online Telemarketing is to search for a specific prospect. To do this, use any of the prospect search criteria fields to locate the specific prospect. One of the most common search methods is to enter the Prospect Id and click *Search.* The search results display below.
Online Telemarketing continued

Once you have selected the prospect, you have three options available:

- **Call Prospect** (previously known as Select Prospect) is an edit feature to be used on incomplete records only. Call prospect allows you to view an INCOMPLETE prospect and make any necessary changes. Call Prospect can also be used when a specific caller needs to receive credit for the pledge being entered or edited.

- **Prospect Maintenance** is an edit feature that allows you to view records and make any necessary changes. It is designed for situations where a previously completed record needs to be changed to an incomplete result code or an update to a record with a complete result code needs to be made. Prospect Maintenance cannot be used to make demographic changes.

- **Change Demographics** displays only the demographic tabs for the selected prospect.

Choose one of the options to enter the record for the specific prospect you selected.

Note: The Prospect Maintenance and Select Prospect functions are both used to change the status of records within CAMPUSCALL. While the two functions are similar, they are not identical and thus cannot be used interchangeably. The explanation provided below explains how to use each function correctly.
Call (Select) Prospect

Call Prospect is designed for situations where a previously non attempted prospect or an incomplete prospect needs to be updated in CAMPUSCALL.

Using Call Prospect in these situations ensures that all necessary information within the CAMPUSCALL database is correctly updated. Call Prospect can also be used when a specific caller needs to receive credit for the pledge being entered/edited.

To enter or edit information, use any of the available search fields to locate the prospect; then choose their name and select Call Prospect. Double clicking the row also opens the record.

Once the prospect's record has launched you have the ability to assign the result code and corresponding statistics to a specific caller by using the Supervisor Tab at the bottom of the main menu.

Select the appropriate caller’s name from the Credit drop-down and then finish coding or correcting the record. This ensures the selected caller receives credit for the result code.
Special Circumstances: Changing the Result Code of a Previously Completed Prospect or Editing/Adding a Specified Pledge

If a previously attempted prospect needs to be recoded as a different type of complete or incomplete (e.g. Already Pledged to Not Available, Unspecified Pledge to Specified Pledge) or a Specified Pledge needs to be edited or added, the following process is used:

Use Prospect Maintenance to change the previously entered complete result code to the new result code. The original call date and employee will remain with the new result code selected.

a. If a different call date is desired for this new result, use the Supervisor tab from the main menu to select a new date and time for the result.

b. If the credit for this result should go to a different caller, you must change the record to an incomplete result type first. Then, using Call Prospect, change the incomplete result code to the desired new result code, with the correct employee selected to receive credit for the result from the Credit drop-down on the Supervisor tab.

Note: Once the EOD process completes the new result will appear correctly on the Historic Report.

To view any record within a calling pool, use the Start Calling Pool option located on the right side of the lookup screen.

This takes you to the first record in your calling pool (refer to Calling Assignments) and begins calling. This can be used if a supervisor needs to start calling rather than moving to a calling station (assuming the station has a Teltone and amplifier attached).

This may also be used if you want to review any record after first loading data to ensure everything looks as it should for callers in the calling routine. You could also do this by using the Calling Pool drop-down menu to locate a pool to search within. The search results display below the search fields and you can select any of the prospects you want to check.
**Employee Monitoring**

This application is also visible from your home page dashboard. Employee Monitoring allows you to monitor the status of all your callers. It displays who is idle, calling, and on a call.

This screen displays information about the employee and the prospect’s record currently on their screen. You can see which project they are calling and what phone number they are attempting.

To view the call history for all calls made by a caller, double click the employee’s name; the employee call history box then appears on your screen.

This screen updates in real time as callers constantly hang up, call, and sit idle. Each caller’s name will be highlighted to correspond with the call status colors you selected in **Project Control**. To stop the automatic updating, use the **Pause** button.

If the **Idle Warning** has been enabled in **Project Control**, you will see the background color change when callers are idle in the calling routine.
Online Statistics

Online Statistics is used during the calling shift to watch statistics, and the screen can be customized to include only those statistics that are most relevant to your site. Each user (supervisor and higher) in CAMPUSCALL can have their own customized online statistics screen. Click New Stat Configuration to begin creating.

Remember that the top section is used only to search, not to create. The tabs for Projection Group Search and Projection Search will be explained at the end of this section.

Step 1 – Name the online statistic you are creating.

Next, click Choose Projects. You can choose one or more projects to be included when the online stat launches. When you choose a project it appears on the online stats screen.

This is the only step that is required. If you click Finish, CAMPUSCALL will apply defaults to the rest of the 7 steps. You can come back later to edit if you want to change the defaults.

It is possible to move to any of the remaining seven steps without going through each step. Simply use the menu on the left to move to any of the additional steps.
Online Statistics continued

Step 2 – Choose which segments should be used from each project. This can be left to default of All Segments if you need a standard, all-encompassing Online Stats view.

If you want to customize your view to include projections for some or all of the segments, choose Selected Segments.

To select segments, click Choose Segments and the window shown below will appear.

Once you’ve selected all the necessary segments, choose Close Window.

If you want to set up projections for each segment, choose the corresponding Projection Group and then the correct Projection.

Assigning Projection Groups and Projections isn’t mandatory for any or all of the segments within the project. You can assign Projections to as many or as few segments as you prefer.
**Online Statistics continued**

Step 3 – Choose which calling pools should be used from each segment. Leaving this set to the default of *All Calling Pools* is advised if you need a standard, all-encompassing Online Stats view. If you want to customize your view to include only specific calling pools, choose *Selected Calling Pools*.

Step 4 – Choose what supervisors and employees for which you want to view statistics. Leaving this set to the default of *All Supervisor* and *All Employees* is advised if you need a standard, all-encompassing Online Stats view. If you want to customize your view to include only specific supervisors and callers, choose individual supervisors and callers from each corresponding box.
Online Statistics continued

Step 5 – Choose what day or date range the statistics will be based on each time the application is launched. If you leave it set to the Current Calling Day, the current night’s calling statistics are displayed.

Step 6 – Select which statistics will appear when the statistics menu is launched each night. If left blue, the stat will appear, if changed to white, it will not appear. The fundraising default will display most needed statistics, but you may also want to select Specified Pledges, Unspecified Pledges, No Pledges, Credit Card Count Rate, and Credit Card Dollar Rate.
Online Statistics continued

Step 7 – Click the Customize Stats button to edit how the online stats screen will look. This screen allows you to move the stat boxes around and organize them in the manner that is most efficient for your call center. Each box can be moved and/or renamed. Simply click the box and drag it to move.
**Online Statistics continued**

Step 8 – This last step sets up how often the page will refresh. One minute refresh works the best. When the statistics menu is opened, you have the option to look at your stats in the form of a graph; the bottom drop-down box allows you to determine what type of graph will be displayed. Click Finish.

After you click Finish, you return to the main Online Statistics screen and you see the stat name that you just created.

To view your statistics menu, click on it to launch.

To edit, use the Edit icon on the far right of the screen.

If this statistics menu is to be used for your Fall calling and Spring calling has just begun, use the copy icon to reuse this for your Spring program. It will ask you to rename the statistics menu and then to re-pick what project to use. Rename it for the Spring, and select your Spring project. Then you can click Finish and the rest of the steps are identical to your Fall Statistics page.
Online Statistics continued

When you launch your online stats, the window should appear just as you configured it during setup. If you would like to view information in a different way, there are several edit options available from the stats window.

From the *Edit* menu, you may change projects, segments, employees or supervisors, set the Result Group to be consistent with the result code group assigned to each of the segments, or change the refresh rate for the stats window.

Use the *Date/Time Selection* to look at past nights of statistics. You can also look at specific times of shifts to see if there are certain hours that are more productive than others.

Use the *File* menu to:
- Refresh the stats window
- Save any changes made to the stats configuration
- Print the stats window
- Close the window

At the bottom of the screen, you can view a cross section of employees and segments. Choose the segment that you want to view and the employee drop-down box updates to display only those employees that have called in that segment.
Online Statistics continued

From the View menu, you can choose to browse Segments, Employees, or Calling Pools that are active during that calling shift. You can also view a listing of all the result codes for the night and how many upgrades have been obtained.

In all Browse windows, data can be sorted by clicked on a header row.

To see a chart of the data, click within the column (when the column is highlighted blue).
Online Statistics continued

The chart will open in a new window. Based on how the online stat was configured, you see a pie or bar chart here.

If there are multiple rows of data, the first 15 rows are displayed in the chart. Using the selection bar at the bottom of the window allows you to select different ranges of data. At a minimum, 5 rows of data are displayed and at most, 15 rows.
**Projection Group and Projections**

The *Projection Group Search* and *Projection Search* tabs in the Online Stat application are designed to allow the user to set projections for each Online Stats view that is created. You can set projections for the overall project summary or for each segment you are calling.

Before a projection can be set, a Projection Group must be created first. If you're going to create a projection for each segment, one *Projection Group* will suffice for the entire project.

Click *New Projection Group* and enter a name for your Projection Group (Nightly Projections, Fall Goals, etc.). Click *Save*.
Once your Projection Group has been created, click the Projection Search tab and select New Projection.

The Projection screen appears. Begin by naming the Projection and select to which Projection Group it will be assigned.

Since the Projection screen allows you to begin entering projections for an overall project summary or segment(s), it will be helpful to name the Projection accordingly (Overall Projections, Business Lybunts, Current Parent Donors, etc.).

To begin, simply type into each box the desired projection. Once you tab to the next projection, the Active box is automatically checked.

It is not necessary to use each projection box; if you only need to set a goal for Total Dollars and Credit Cards, enter in the desired number and click Save.

If you need to set additional Projections, use the Copy button. This will allow you to reuse the existing Projection to create a new Projection.
**Projection Group and Projections continued**

If there are Projections that have been created which you would like added to your new Projection Group, select the Projection Group from the Projection Group Search tab. It is possible for a Projection to exist in multiple Projection Groups.

On the Projection Group Search tab, select *Search* and the segment group to which you need to add the Projection.

Every available Projection that has been created appears on this screen.

To add a Projection to your Projection Group, double click and it will move into the Selected box on the right side of the screen.

To remove Projections from the Projection Group, simply double click and it will return to the Available box on the left side of the screen.

When all projections have been added or removed from the Projection, click *Save*. 
Projection Group and Projections continued

In addition to assigning a Project Group and Projection to each segment, it is also possible to manually assign Project Groups and Projections to the overall project or individual segments once you launch the Online Stat View.

Once your Projection Group(s) and Projection(s) are created, select the appropriate Stats from the Stats Search tab. At the top of the screen, you are able to select the desired Projection Group and Projection.

If you want to display projections for the overall nightly goal, select the appropriate Projection Group and the Projection drop-down menu will populate with the names of all Projections that are within the selected Project Group.

Pick the correct Projection from the drop-down menu. This will display in your Online Stats window by highlighting the corresponding stat boxes in either blue or pink; blue represents at stat that is above the goal, pink represents being below the goal.

If you hover over a pink or blue cell, a pop-up box displays a message indicating the projected goal for that field.

You can navigate between multiple Projection Groups and Projections throughout shift in order to achieve the highest level of efficiency.
**Prospect Review**

Prospect Review is used for Pledge Review, Comment Review, Change Demographic Review and Prospect Lookup.

The Search tab is used to look up prospect information. You can search by one or a combination of fields.

Search results display below the search tab. Make sure the project name at the top is set to the correct project.

To get a more detailed search, combine the fields on the Search tab with those on the Advanced Search tab. Pledge Review, Comment Review, and Change Demographics are done from the Advanced Search tab.

To review all records coded as a Pledge during the calling shift:

- Set the Date Selection to Daily
- Click Not Reviewed in the Pledge Review Flags section

Click Search.

All results appear at the bottom of the search screen.

Click on the prospect’s name and the record opens.
Prospect Review continued

After you select a prospect to review, you have three tabs of information: Demographics, Call Info, and Pledge Info. To review the pledge, select the Pledge Info tab. From this tab, you can check the amount of the pledge, address, and designation for anomalies.

If a record needs to be edited or coded as a different type of complete, use the Prospect Maintenance button at the bottom of the screen. This takes you directly to the prospect's record where you can make any necessary changes.

If a change needs to be made to the prospect's demographics, use the Change Demo button at the bottom of the screen. This opens all of the demographic fields, which can then be edited.

It is easy to determine if a caller made demographic changes since the Demographics tab will display as purple font color if changes were made, and black font color if no changes were made. Once on the Demographics tab, any demographic changes will be displayed in blue. Hover over the blue text to view the original demographics.

Once this record has been reviewed and any necessary changes made, mark the record reviewed by using one of two methods: select Reviewed and you are automatically moved to the next prospect, or click the Ctrl + R keys to mark the record Reviewed and move onto the next prospect. This ensures that if Pledge Review is done again later during shift this record will not reappear.

You can manually move to another record by clicking reviewed and using the drop-down box at the top or bottom of the screen, or the arrows to the left and right of the prospect's name.
Prospect Review continued

Comment Review is very similar to Pledge Review.

To review all records with comments received during a calling shift:

- Set the Date Selection to Daily
- Click Not Reviewed in the Call Flag section
- Select Must Have a Comment

Click Search.

The search results appear below the search tab exactly as they did with pledge review searches.

Comments appear on the Call Information tab. Check that the comment is relevant and appropriate. If the comment needs to be edited or deleted, use the Edit Comments button at the bottom of the screen.

The Call Information tab also allows you to view all call results for this record. Use the arrow buttons shown under Call History to view the results for every time this record has been attempted.

Once any necessary changes have been made, click Submit. Then click Return to Prospect Review.

Once the record has been approved, select Reviewed at the bottom of the screen, or use the shortcut command CTRL-R to mark the record reviewed and automatically move to the next prospect.

At the bottom of the screen, there is also a Delete button. This is used to delete a prospect from the database. This is permanent. This option is only available on records that have not been completed.
Prospect Review continued

In addition to being used for prospect lookup, pledge and comment review, this can also be used to review demographic changes.

To review all demographic information that has been changed during a calling shift:

- Set the Date Selection to Daily
- Click Not Reviewed in the Call Flag section
- Select Must Have a Demo Change

Click Search.

This returns results for all records that have been changed by the callers.

If any demographic information has been changed, the Demographics tab is displayed in a purple font color.

Once on the Demographics tab, any changes are displayed in a blue font color. Hover over the blue text to view the original demographics.

If the demographic field was originally blank, the hover box will display (blank).
Email Approval

If email approval is required, the email approval queue allows you to view all outgoing emails and review the emails prior to being sent. Once a project has been selected, all emails within the project still awaiting approval will automatically appear. Emails can be located by email status, prospect, caller, and/or whether PS text was added to the email.

To review the email details and any PS text, click the row containing the desired email.

From the email detail screen, edits to the email address, subject, body, and PS can be made.

When the email has been reviewed and is ready to be sent, click Approve to initiate the email sending process.

Emails can also be approved in mass from the main email approval screen.
**Messaging**

Messaging allows supervisors to communicate with their callers by sending a pop-up message to one individual or the whole team.

The Messaging Search screen appears once you select *Messaging* from the *Calling Shift Menu*.

You can either enter information on the top row or leave the fields blank and select the *Search* button for a full listing of existing messages (which is the example shown below).
Messaging continued

After selecting the appropriate message from the listing, you are taken to the Message Detail screen where you can select and save any of the areas below.

To view a list of available employees, type in a name and select Submit; Or use the alphabet located in the Available Employee box. To move all available employees to the selected employees, use the Add All button. Choose Move Selected if you want to choose a certain individual. Choose Remove All if you want all of the selected employees in the far right box to be removed.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>The start date for your message to begin.</td>
</tr>
<tr>
<td>End Date</td>
<td>The final date for your message to appear.</td>
</tr>
<tr>
<td>Message Name</td>
<td>The title you want to give your message.</td>
</tr>
<tr>
<td>Description</td>
<td>A detailed description (up to 250 characters) of what this message is about.</td>
</tr>
<tr>
<td>Message is Active</td>
<td>Selecting the check box makes the message active in the system.</td>
</tr>
<tr>
<td>Employee Name</td>
<td>Search by employee name for this message.</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Search by supervisor name for this message.</td>
</tr>
<tr>
<td>Available</td>
<td>All active employees available to be selected for the schedule.</td>
</tr>
<tr>
<td>Selected</td>
<td>Employees selected for schedule.</td>
</tr>
</tbody>
</table>
Creating a New Message

To create a new message, select New Message.

You are now able to enter the start and end date, along with the message name and the content of the message. The start and end dates apply to when you want to start displaying the message and when you no longer want it to be visible to callers. Only someone with the role of supervisor or higher is able to create a message. It cannot be done caller-to-caller. Remember to make the message active.

Here, the supervisor is able to create a new message that appears as an individual or team message on the computer screen(s).

The new message appears at the bottom of the online routine for callers or can be viewed by the messages tab.
Recycle Calling Pools

This is used to recycle records that are incomplete from the current night's calling shift. CAMPUSCALL does this for you automatically each night. Manually recycling calling pools is done very infrequently. If you need to recycle for multiple projects, use the drop-down menu to select a different project. If you are unable to locate your project in the drop-down menu, begin typing the name of the project in the search box and click the magnifying glass to process the search.

If you leave the defaults set and click recycle records, it will send every record that has been called tonight back to the calling pools to be available to callers. This will not cause a problem for most result codes, except the Not Available result code. Since by definition Not Available is someone that you've already spoken to tonight, you may run into prospects that are upset that you are calling back twice in the same evening.

In addition, for prospects that have caller ID, they may also become upset if they see that you've tried to call multiple times in one night.

If you must recycle records during a shift, try to avoid recycling records coded as Not Available.

Records are also cached to employees. This enables records to be available to callers at a faster rate. Since records are cached (or sent to the employee) you may also want to release cached records here. This option releases those cached records previously sent to an employee and makes them available again for all callers.
**Callback Analysis**

This feature is used to manage any callbacks put into CAMPUSCALL by your callers, and allows you to Release, Recycle or Move any selected callbacks. Callbacks scheduled callers that no longer work for you will not be called unless you release or recycle those records, making them available to the general calling floor.

You can sort by several selection options in callback analysis: Employee, Pool Name, Date, and Due/Past Due.

Two of the most common ways to sort are by Employee and Due/Past Due.

When you select Due/Past Due, it shows all the callbacks that are either due today or are past due.

You can choose to Release, Recycle, or Move those callbacks to another caller.

If you choose to sort by Employee, a drop-down box will appear with the names of every caller that has callbacks scheduled under their name. You can scroll through this list and look for any caller that is no longer on your staff.

The callbacks that are scheduled under their name can either be Released, Recycled, or Moved.
Callback Analysis continued
If you choose Release, the selected callback(s) are made available to any caller at the scheduled time and date. Releasing callbacks is most common.

If you choose Recycle, the selected callback(s) are made available to all callers immediately. It disregards the original date and time of the callback.

In addition to being able to Release or Recycle a callback, you can also Move a callback to a specific caller. If you have a caller who no longer works there, but their callbacks consist of $1000 donors, you will probably have someone specific in mind that needs to call those records. If this is the case, you can take those callbacks and move them to a specific caller.

Select the callback that you want to move. Then begin typing the name of the caller to which you want to move this callback.

As you begin typing, this pop-up screen of employees appears. Select the employee that you want to receive the callbacks and their name is populated in the box. Click Move and the callback(s) that you’ve selected are moved to the name of the caller in the box.
**Project Analysis**

Project Analysis shows you an overview of each segment and calling pools completion status within a project. Select your project from the project lookup drop-down box. Once a project is selected, all segments are displayed below.

The Percent Complete is calculated by dividing all completed records by the total number of records available.

The Completes/Available column shows the total number of completes for the segment/calling pool and the total number of available records. Available records exclude any record that is blocked or that has reached its maximum attempt limit.

Once a segment is selected, all calling pools within that segment are displayed.

The percent complete also displays by calling pool record count.
**Employee Call History**

Employee Call History allows you to view every attempt made by a caller during the specified project and date range. Begin by selecting the correct project in the project lookup box.

Next, use the Employee lookup box to search by name, supervisor, start and end date, or role. Once you click Search, all employees found by the search criteria are available in the Results drop-down box. You can also search by Supervisor, Start and End Date, and/or Role.

The Call History displays below. These results will display for each prospect: ID number, phone number, date and time of result, result code, system time, and talk time.

Listed above the Call History section are the details of the employee's First and Last Call Date.
Master Prospect Lookup

Master Prospect Lookup allows you to search within all of active projects for a prospect. This is useful if you have multiple projects that are being called and you need to find call information for a specific prospect from any of these projects.

Use any of the search fields to locate a specific prospect. When the results populate, the first column will indicate to which project the prospect is loaded.

Select the desired prospect to launch an abbreviated version of their calling history.
**Higher One Recurring**

The Higher One Recurring application allows the user to schedule and manage recurring or multiple gift credit card payments. If the project is set up to use an OGI vendor other than Higher One, this application CANNOT be used.

Select the project containing the recurring gifts, set a start and end date and select Search. Any recurring or multi payment gifts within the project and date range specified will be displayed.

If previously scheduled payments need to be viewed, select Complete.

Highlight and select the prospect whose payments need to be scheduled.

![higher one recurring search](image)

**Note:** Higher One does not allow payments to be scheduled on a weekend, and it does consider Friday to be a weekend. When you highlight the row of a prospect whose payment is scheduled to begin on a weekend, a reminder message will appear and the date must be changed in the First Recurring Payment Date field.
**Higher One Recurring continued**

Once the prospect has been selected, the Higher One Payment Processing screen is displayed. This will display the payment date, number of payments remaining, payment amount, and last four digits of the credit card.

Once all the information has been reviewed, select **Schedule**.

After the payment has been scheduled, the **Completed** check box at the far right of the screen will need to be selected, along with using the **Complete** button at the top of the screen.

Selecting **Complete** after each payment is processed in Higher One confirms the process in CAMPUSCALL and suppresses the record from any future searches.
Reports Plus
Reports Plus houses all reports available with CAMPUSCALL. To access Reports Plus, locate Reporting from the CAMPUSCALL Calling Shift Menu.

Generating Reports
All available reports are found on the reports tab within Reports Plus. Reports can be saved into batches which are scheduled to run automatically and moved to your SFTP site. Common database reports to be batched include the Pledge Report, Credit Card Report, Change Demographics Report, Comment Report, and Call Listing Report.
**Generating Reports continued**

To view a report, select a report from the Reports list in the left panel. To locate the project(s) you want to run reports for, click the Select Projects button. A pop-up window appears listing all active projects; click the project(s) and use the single arrow, or double click the desired project(s), to move the project(s) to the Selected box. Click Save once all projects have been selected. The projects selected here will remain selected for all future reports.
Generating Reports continued
Activate the project for a report by checking the box next to the desired project name. All report options then appear allowing you to make the appropriate selections for the report. Each report has different parameters available which define the information to appear on a report. Use the scroll bar to view all parameter options.

Once all parameters have been defined, click view to generate the report. A new window appears displaying the report details.
**Saving Reports**

Report details can be saved to allow you to easily generate the same report for future use. For a report that you use frequently, instead of defining the report parameters every time you want need the report, simply select Save. Use the Alias box to give the saved report a name and select/create a report group to store this report with other similar saved reports.
**Saved Reports continued**

Saved report appears under the *Saved Reports* heading on the left side of the reports screen AND on the Saved Reports tab at the top of the screen.

When you need to run the saved report, select it from the *Saved Reports* folder and click View.

If using the Saved Reports tab, select the report group and either execute the group so all reports in the group are generated, or to generate an individual report, select the icon to view.

To edit the parameters for the saved report, use the arrow button next to the saved report icon.

If you no longer wish to have this report saved, use the trash can icon to delete. The trash can icon can also be used to delete the saved report group.
CAMPUSCALL Review and Practice Worksheet

<table>
<thead>
<tr>
<th>Topics</th>
<th>Section in Training Guide</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Add a new caller into the system</td>
<td>Employee Demo</td>
</tr>
<tr>
<td>2. Change the new caller’s password</td>
<td>Employee Demo</td>
</tr>
<tr>
<td>3. Add a new supervisor to the system (or change the new caller to a supervisor)</td>
<td>Employee Demo</td>
</tr>
<tr>
<td>4. Assign calling pools to the new caller</td>
<td>Calling Assignments</td>
</tr>
<tr>
<td>5. Find a prospect named Mr. Jones and give him a pledge for $1000</td>
<td>Online Telemarketing</td>
</tr>
<tr>
<td>6. Find a prospect named Mr. Smith and enter a No Pledge with extended comments</td>
<td>Online Telemarketing</td>
</tr>
<tr>
<td>7. Check pledges and comments</td>
<td>Prospect Review</td>
</tr>
<tr>
<td>8. Change Mr. Jones to a pledge for $1345</td>
<td>Online Telemarketing</td>
</tr>
<tr>
<td>9. Pull up someone coded as No Answer and code them Do Not Call</td>
<td>Online Stats</td>
</tr>
<tr>
<td>10. View caller statistics from last night’s shift</td>
<td>Messaging</td>
</tr>
<tr>
<td>11. Send a message to the newly created caller</td>
<td>Callback Analysis</td>
</tr>
<tr>
<td>12. Review Callback details</td>
<td>Project Analysis</td>
</tr>
<tr>
<td>13. Review available record counts and completion rate</td>
<td>Reports Plus</td>
</tr>
<tr>
<td>14. Run two reports that you might use to help prepare for the calling shift</td>
<td></td>
</tr>
</tbody>
</table>
CAMPUSCALL List Serve Instructions

SUBSCRIBE
- Send an email message to majordomo@lists.ruffalocody.com
- Do not type anything in the subject line
- In the body of the message type: subscribe ccall-l  *(that’s CCALL-L)*

You should then receive a confirmation email welcoming you to the list.

SEND A MESSAGE
- Send your message to ccall-l@lists.ruffalocody.com
This will send your message to everyone subscribed to the list.
You may also reply to a message. This will be sent to all subscribers.

UNSUBSCRIBE
- Send an email message to majordomo@lists.ruffalocody.com
- Do not type anything in the subject line
- In the body of the message type: unsubscribe ccall-l *(CCALL-L)*