

Most Common CampusCALL Challenges and Solutions

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Agenda

- Project Setup
- Reporting
- Uploads/Selection Wizard
- OGI
- Employee Role Definitions

Is your project ready to start calling?

- Items of discussion – order of creation.
 - Datafile/Control Files
 - Segmentation Maintenance
 - Segment Group Control
 - Calling Pool Maintenance
 - Employee Calling Assignments

Control File/Datafile

What is a datafile? What is a Control File?

Datafile- Collection of data.

Control File – File that contains instructions where you control where the data is loaded.

How do I load Data?

Download File Maintenance-Used to convert a datafile in a delimited format to a fixed format

CCLoad – Tool used to load the datafile using the control file.

Segmentation Maintenance

- Segmentation allows the user to assign prospects to a specific segment group if the prospects were not segmented during the load process.
- ****Note**** - In 3.4 Segmentation Maintenance will be in Segment Group Control.

Segment Group Control

- Segment Group Control is used to setup segmentation for reporting, specify the segment codes for use with the segment, set options for calling, and to specify what information needs to be captured when entering a result.

Calling Pool Maintenance

- Calling Pool Maintenance is used to create and modify calling pools from downloaded prospects.
- Most common is using the segment group name for the setup.

Employee Calling Assignments

- Calling Assignments is for assigning calling pools to employees.
- ****Note**** If you are located on the West Coast you need to have Zone 1 (Eastern) to stop at 6:00PM. You cannot assign All Zones and have them stop at 9:00.

Reporting

- Reports Plus is a central location that contains all of the available reports within the CampusCALL System.
- 3 ways to run reports.
 - 1) Manual
 - 2) Batch
 - 3) Schedule

Upload Process/Selection Wizard

- Upload Process allows the user to extract data from the CampusCALL Database. This data can be used for uploading the data back to the institution's mainframe or extracting data to produce a mailing piece.
- Selection Wizard allows the user to specify which records they'd like to upload.

OGI – Online Giving Integration

- The main benefit of using OGI is as a part of your institution's PCI compliance program. With OGI, sensitive credit card data will no longer be stored on the CAMPUSCALL server.
- In addition, credit card gifts are immediately processed and fulfilled.

OGI – Online Giving Integration

Key Tasks to Implement

1. Choose an OGI processing vendor. We have a list of vendors available. This step takes the longest!
2. Configure CAMPUSCALL to use your OGI vendor
3. Test by putting gifts through using the CAMPUSCALL “TEST” project and the vendor’s test URL
4. Re-configure to use production values, assign OGI to your projects, and go ‘Live’!

Employee Role Definitions

- Getting Ready for 3.4
 - Representative
 - Supervisor
 - Manager
 - DBA
 - Create your own role