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CallPower User Guide

Account Management

To Create Your Account

New accounts must be initiated by an administrator. To begin, you must receive an email from info@callpower.org with the subject line "Create account on Call Power."

1) Open the email and click the activation link. This link can only be used once.
2) Enter an email address that is checked regularly, a unique username, an optional phone number, and a password between 6 and 64 characters long. All of these fields can be edited later. Click the "Save" button to continue.
3) The Call Power dashboard will load, and the new account will be created.

To Log In to Call Power

1) Load your organization's Call Power site.
   - For example: http://demo.callpower.org
2) Click the menu labeled "Login" in the top-right corner of the screen and enter your username and password.
   a. Check "Remember Me" if using a private computer, and Call Power will not automatically log you out after you close your browser session.
3) Click the "Save" button to continue. The Dashboard will load.

To View or Edit Your User Profile

1) Once logged into Call Power, click the menu labeled "User" in the top-right corner of any screen. A dropdown menu will appear.
2) Select "Profile." The Update Profile page will load.
3) Enter a new email, username, and/or phone number.
4) Click the "Save" button to continue. The Dashboard will load, and the new profile information will be saved.

To Change Your Password

1) Once logged into Call Power, click the menu labeled "User" in the top-right corner of any screen. A dropdown menu will appear.
2) Select "Change Password." The Change Password page will load.
3) Enter a new password, between 6 and 64 characters long, in both fields.
4) Click the "Save" button to continue. The Dashboard will load, and the new password will be saved. Use the new password the next time you log in.

To Log Out of Call Power

1) Once logged into Call Power, click the menu labeled "User" in the top-right corner of any screen. A dropdown menu will appear.
2) Select "Log Out." The Call Power home page will load, and you will have to log in again to view or manage a campaign.

To Invite a New User (Admin Only)

1) Once logged into Call Power, click the menu labeled “User” in the top-right corner and select “Manage Users”.
2) Click “Invite +” and enter the user’s name and email address. An invitation email with a login link will be sent automatically.

To Create a New Campaign

A campaign connects callers with targets, playing your recorded message to guide them through the process. During each caller’s session, they might place one or more calls with campaign targets.

To create a campaign, you must specify targets (people that callers will be connected to via the Call Power tool) and audio clips (which will guide the callers during their session). Creating a new campaign requires choosing targets, recording audio, and confirming the campaign before launch. These actions can be made from the New Campaign page.

Defining Targets

1) Select Dashboard from the top menu bar. The Dashboard page will load.
2) In the Campaigns table, click the “New Campaign” button. The New Campaign page will load.
3) In the Campaign Type section, enter a Campaign Name and Campaign Type. The Campaign Type options are: Executive, Congress, State, Local, or Custom.
    a. Executive: Specify if President or other Office
    b. Congress: Specify if Both Bodies, Senate Only, or House Only
    c. State: Select a state, and either Governor, Legislature – Both Bodies, Legislature – Upper Body, or Legislature – Lower Body
    d. Local or Custom: Enter your targets below.
4) In the Targets section, choose where the session will direct callers.
    a. For Executive, Local, or Custom:
        i. Click the “Add” button to create a new campaign target.
        ii. Click the word “Title” and type that target’s title. Repeat with “Name” and “Phone.”
        iii. Click the red “X” to remove a target.
        iv. Click the four-pointed arrow to drag and reorder targets.
        v. If more than one target is available, callers will be connected to each in sequence. Specify if targets should be called in this arranged order (In Order) or shuffled randomly each time (Shuffle).
        vi. If you want to limit the number of calls received by each individual target, click “Limit Maximum Calls” and enter a limit.
    b. For Congress or State:

i. Specify if participants should be assigned their representative according to constituent jurisdictions (location) or through a custom list of targets (custom).
    1. If you select Location, specify if the campaign will use ZIP codes (ZIP / Postal Code) or latitudes and longitudes (Lat / Lon) to assign participants to their representatives. Select None if targets should be connected to callers independent of the caller's location.
    2. If you select Custom, a Target Set field will appear. Begin entering any Congressional or State legislator's name, and click the "Add" button to automatically import that individual's official contact information. Otherwise, use the steps in Executive/Local/Custom above to add targets.

ii. If more than one target is specified, callers will be connected to each in a sequence. Specify if targets should be called in the arranged order (In Order) or shuffled randomly each time (Shuffle).

iii. If you want to limit the number of calls received by each individual target, click "Limit Maximum Calls" and enter a limit.

5) In the Phone Numbers section, specify how Call Power will reach participating callers.
    a. Specify which phone numbers should be used to dial participants. Each outgoing number can place a maximum of one call per second, so high volume campaigns may need more than one. Targets will not see this number, individual caller's numbers will show in their caller ID. To purchase additional numbers, contact your site administrator.
    b. If you want to allow callers to dial into the Call Power system (as opposed to inviting them to submit their phone number and then having the system call out) check "Allow Call In."
6) The campaign will automatically launch as a live campaign. If you would prefer to launch as a paused or archived campaign:
    a. Click the orange "Edit Status" button at the bottom-left. The Change Status page will load.
    b. Make a selection (Live, Pause, Archive).
    c. Click the "Save" button to save and return to the Edit Campaign page.
7) Click the "Edit Audio" button, and the Campaign Audio page will load.

Configuring Audio

There are at most ten audio clips that must be recorded for any campaign. Those marked with an * below are required for every session. Others are required in specific cases, as described below. When recorded, these clips will be played in the following order:

- Introduction*: The first thing a caller will hear. Introduce yourself and the campaign.

- Start Confirmation: Ask the caller to get started by pressing the "*" key. This will screen out calls that went to a potential caller's voicemail.
- Location prompt: Ask the caller to enter their ZIP code. Necessary when assigning callers by ZIP code, when the caller's location data is not pulled from another source. Requires the Unparsed Location and Invalid Location clips under Additional Location.
- Call Block Introduction*: This should be the majority of the recorded prompt. Explain what the campaign is about, and what the caller should tell the people that they will speak with. Let the caller know that they can end a call by pressing the "*" button.
- Target Introduction: Introduce the target by name and title.
- Between Calls: On a session with multiple targets, this brief message should encourage callers to keep going.
- Final Thanks*: When the call is complete, thank the caller for taking action.

There are also three audio clips related to locations, listed under Additional Location.

- Introduction with Location: If the caller dials in directly, this will be the first message they hear. This clip should ask the caller to enter their ZIP code, if locations are required to select targets.
- Unparsed Location: If Call Power couldn't understand the location they entered, ask them to try again. Necessary whenever a location prompt is used.
- Invalid Location: If the location they entered is not part of this campaign, offer them an alternative action. Necessary whenever a location prompt is used.

Begin by navigating to the Campaign Audio page (either as a continuation from *Defining Targets* or while editing an existing campaign).

1) Plan your message for each prompt. Messages can be any length, but are most effective when brief and succinct.
2) For the clip you would like to record, click the "Record" button. The "Record [name of section]" window will appear.
3) If asked to share your microphone, click "Allow."
4) Messages can be recorded in one of three ways.
    a. Record: Click the "Start" button, speak into the microphone, and click the "Stop" button when finished. Once complete, use the embedded playback bar to review and confirm the recording. Click the "Reset" button to rerecord if needed. Once finished, click the "Save" button.
    - *This feature may not work in the Internet Explorer or Safari browsers* -
    b. Upload: Click the "Choose File" button, and upload a recording saved as either MP3, WAV or AIFF. Click the "Save" button to upload the file.
    c. Text: Enter text here and Call Power will read it back to the caller. You can use variables like {{title}} and {{name}} for the Target Introduction.

5) The dialog will disappear, returning to the Campaign Audio page. A checkbox will now be visible by the newly recorded audio to confirm it uploaded.
6) Record all the necessary audio sections, and click "Play" to review the active selection.
7) All recordings are saved, and can be retrieved by clicking the "Version" button.
    a. The " [name of section] Recording Versions" window will appear.
    b. Use the embedded playback bar to review and confirm the recording.
    c. Click the checkbox by the version you choose to use, and the window will close.
8) Click the "Save and Test" button to continue.

Confirming the Campaign

Begin by navigating to the Launch Campaign page (either as a continuation from *Configuring Audio* or while editing an existing campaign).

1) Review the information in the Review Details section. To make changes, use the orange "Back to Audio" button to return to the Campaign Audio page, and then the orange "Back" button at the bottom of that page to return to the Campaign Details. Save changes and use the green buttons to navigate back to this page.
2) Initiate a test session through "Call Me".
    a. If a phone number is not associated with your account, enter a phone number in the first field, and a zip code in the second field.
    b. Click the "Test Call" button to proceed. Note this test session will place you in live calls with the given target phone numbers. Press "*" to end one call and continue to the next.
    c. Use the orange "Back to Audio" button to return to the Campaign Audio page and rerecord any segments as needed. Return to this page to confirm changes.
3) In the Embed section, you can connect the call campaign with your website.
    a. Display Script: Enter an example script to display to the user as they fill out the call form. You can enter HTML formatting.
    b. Form Embed:
        i. None - Callers will only connect to the campaign by dialing in, or via external API integrations.
        ii. iFrame - You can place this code on a page in your website, and it will show a simple form where callers can enter their name and phone number to be connected to the campaign.
        iii. Custom - If you have an existing action form, place this javascript code on your page to connect it to CallPower. Specific fields in Custom Embed Options configure the behavior of this script. Contact your administrator for assistance.
4) Click the green "Launch" button to activate your campaign. The Campaigns List page will load, and the campaign will be live.

To Manage an Existing Campaign

Once a campaign is created, its details can be changed. This includes the target selection, the audio clips, and whether or not the campaign is live. These details and more can be viewed from the Campaigns page.

To Edit an Existing Campaign's Targets, Status, or Audio

1) Select Campaigns from the top menu bar. The Campaigns page will load.
2) Identify the campaign you would like to edit in the list. Click "edit" to the far right. The Edit Campaign page will load.
3) Make adjustments as desired. See *Defining Targets* for descriptions of each option, including the orange "Edit Status" button and its options.
4) To pause, archive, or reactivate a campaign, click the orange "Edit Status" button to the bottom-left of the page. Make a selection and click the "Save" button to return to the Edit Campaign page.
5) Click the green "Edit Audio" button at the bottom of the page to save changes and proceed. The Campaign Audio page will load.
6) Rerecord audio as desired. See *Configuring Audio* for descriptions of each clip.
7) Click the green "Save and Test" button at the bottom of the page to save changes and proceed. The Launch Campaign page will load.
8) Make changes as needed, and click the green "Launch" button to save changes and launch the modified campaign.

To Activate, Pause, or Archive A Campaign

Campaigns can be one of three statuses: live, paused, or archived.

1) Select Campaigns from the top menu bar. The Campaigns page will load.
2) The Status column will indicate the current status of the campaign.
    a. Live: the "play" symbol, a right-facing arrow
    b. Pause: the "pause" symbol, two vertical bars
    c. Archive: the "stop" symbol, a square
3) Identify the campaign you would like to manage in the list. Click "edit" to the far right. The Edit Campaign page will load.
4) Click the orange "Edit Status" button to the bottom-left of the page.
5) Make a selection and click the green "Save" button to save and return to the Edit Campaign page. Return to the Campaigns page to see the change in effect.

To Copy an Existing Campaign Into a New One

If a campaign has carefully chosen targeting or audio clips, it may be useful to copy these configurations into a second new campaign.

1) Select Campaigns from the top menu bar. The Campaigns page will load.
2) Identify the campaign you would like to edit in the list. Click "copy" to the far right. The Edit Campaign page will load with the original campaign's information.

3) Make changes as needed. Note that the Campaign Name will be the same as the original campaign with the characters “(copy)” added at the end. Please rename this campaign to avoid duplication.
4) Click the green “Edit Audio” button at the bottom of the page to save changes and proceed. The Campaign Audio page will load.
5) Rerecord audio as desired. See *Configuring Audio* for descriptions of each clip.
6) Click the green “Save and Test” button at the bottom of the page to save changes and proceed. The Launch Campaign page will load.
7) Make changes as needed, and click the green “Launch” button to save changes and launch the modified campaign.

To Test an Existing Campaign

To ensure the targeting and audio are correctly configured, or to recall the embed code, the Launch Campaign page can be quickly accessed from the Campaigns page.

1) Select Campaigns from the top menu bar. The Campaigns page will load.
2) Identify the campaign you would like to edit in the list. Click “test” to the far right. The Launch Campaign page will load.
3) Place a test call, and/or use the orange “Back to Audio” button to navigate to the Campaign Audio and Campaign Details pages.
4) Generate and save embed codes as needed.
5) Click the green “Launch” button to save changes and launch the modified campaign.

To Review A Campaign's Statistics

Call Power displays several key indicators of a campaign's impact, including:

- Number of calls completed: the number of times that a caller speaks with a target (may be more than one per caller, if there are multiple targets per call).
- Conversion rate: of the number of sessions, what percentage include at least one successfully connected target call
- Session median: the median number of target calls per caller session
- Call counts: the number of calls attempted per target, separated by outcome
- Call Log: a time stamped record of every attempted call by target, status, and duration (in seconds)

Note that there are six possible outcomes for each attempted call.

- Completed: the caller reaches the target's phone line or voicemail
- Busy: the target's line is busy
- Failed: the call failed, most often because of a wrong number
- No Answer: the target did not answer
- Canceled: the caller canceled or hung up before a connection could be made
- Unknown: a preliminary diagnosis of another technical issue

To View A Campaign's Statistics

1) Select Statistics from the top menu bar. The Statistics page will load.
2) Select the desired campaign from the Campaign dropdown list. The campaign's statistics will appear.
3) Under Group By, select the time frame through which you would like to view the statistics.
   a. Select "day" to group calls by day, "week" by week, etc.
   b. Select start and end dates to define your time window.
4) Statistics will appear in the following places, from top to bottom.
   a. Calls completed, Conversation rate, and Session median will appear to the top-right of the page.
   b. The Call Log is accessible by a link under Session median. This link will open the Call Log page. The Call Log is also accessible directly from the Campaigns page.
   c. The graph depicts calls by selected grouping period (day, week, etc.). The color key indicates which colors represent which call outcome.
   d. Call counts by target are in a table on the bottom of the page.