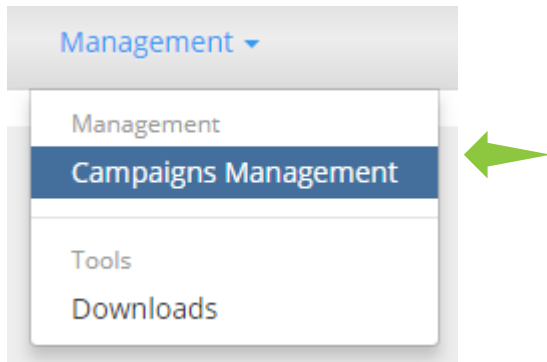


Updating List Options

Roles and Permissions: IA Admin / Client Admin / Genii

On the app go to Campaigns Management



And then to the Overview of the campaign you will be updating

ID	Description	Company	Product	Revision	Status	
9	Customer A Services Combo AQA	Test B	ComboQA	11	RUN	Overview Reporting Dashboard Coaching Feedback



Select Campaign Form Wizard on the Overview of Campaign page

Overview of Campaign

Campaign: Customer A | Services Combo AQA

Details of Campaign

CampaignID: 9

Description: Customer A | Services Combo AQA

Campaign Status: RUN

Configuration: ComboQA

Remarks:

Captured Calls:

Daily Captured:

Available Sample's:

Randomizer: [Next](#)

Total Count: 20

Calls by IAAdmin@geniianalytics.com captured: 0

None!

Hour: 15 | Row: 160 | Val: 176 | Time: 16:07:25

[Overview](#) | [Reporting](#) | [Dashboard](#) | [Coaching Feedback](#) | [List Campaigns](#)

[Edit Campaign](#)


[Reset Sample Allocation](#)

[Capture Assessment](#)









[Campaign Form Wizard](#)

[Assign Users](#)



 A Tag indicates that the wording 'Mandatory Entry' should be included in your list as the first entry, to ensure that the selection will be made, and validation will be performed.

✖ The cross indicates that the list is not enabled for viewing on this form.

Manage the List for the Call Details Tab			
List Name	Values	Configurations	
#AgentID	Mandatory Entry;Agent1;Agent2;Agent3;Agent4;Agent5;Agent6;Agent7	 	<div>Update</div> <div>Import CSV</div>
#CallAgentClass	Mandatory Entry;One;Two;Three;Four	 	<div>Update</div> <div>Import CSV</div>
#Department	Mandatory Entry;Dept1; Dept2	 	<div>Update</div> <div>Import CSV</div>
#TeamLeader	Mandatory Entry;TM1;TM2	 	<div>Update</div> <div>Import CSV</div>

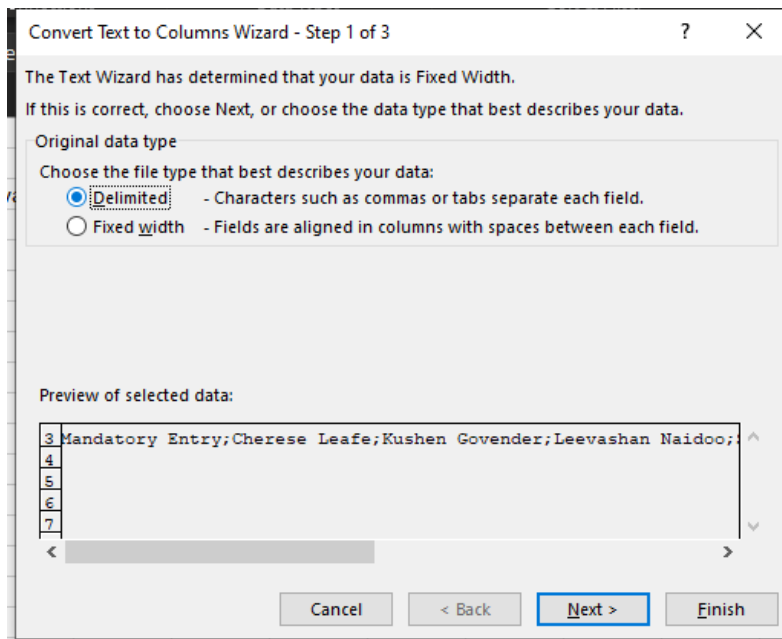
[illegible]

To make it a list select the cell (B3 in the eg).

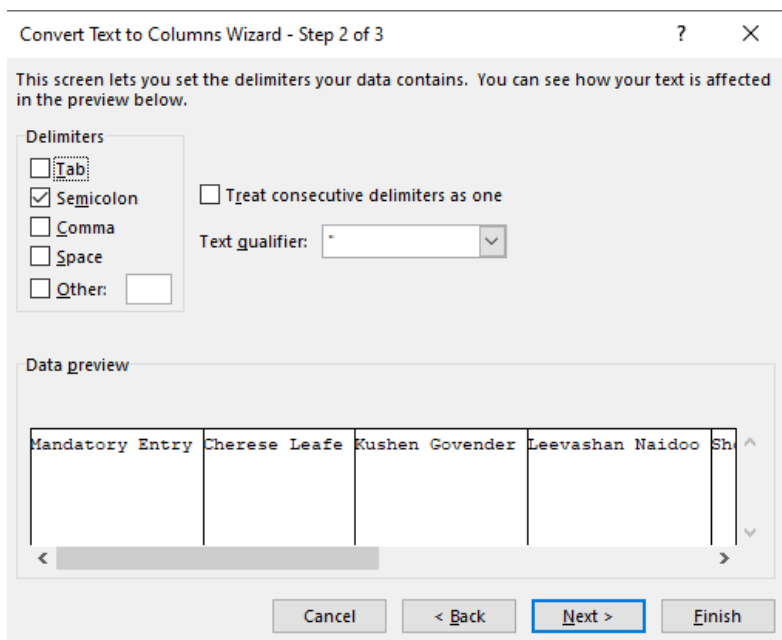
The screenshot shows the Microsoft Excel ribbon with the 'Data' tab selected. A green arrow points to the 'Data' tab. The ribbon includes sections for 'Get & Transform Data', 'Queries & Connections', 'Data Types', 'Sort & Filter', and 'Data Tools'. The 'Data' tab is highlighted, and the 'Data Tools' section shows the 'Text to Columns' button.

The following window will show

Select Delimited on Step 1



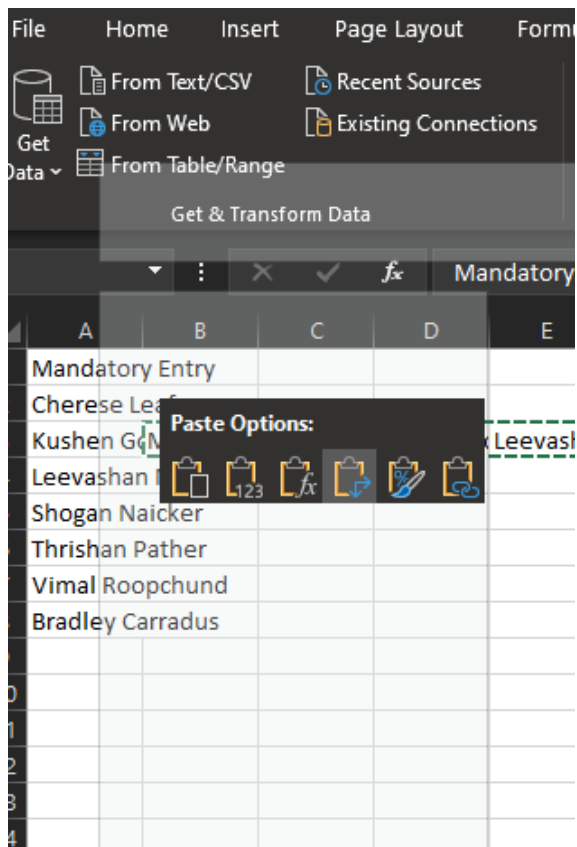
Select Semicolon and Finish on Step 2



This will put the names into individual cells

[illegible]

Now copy and transpose (paste) so that the list is in one column.



Prepare new names to be added as follows in excel:

1. Manage list as First Name, space, Last Name
2. Trim Names to ensure that there are no additional spaces before or after the names.
3. Proper Names to ensure that the names are in proper case.
4. Ensure that the spelling of each name is correct.
5. Ensure that there are none of the following special characters – (; ,)

Add new names to existing list

6. Alphabetise list. (Sort)
7. Save Team Leader and Agent list as separate CSV files with the headings #TeamLeader or #AgentID respectively.
8. The first entry should always be 'Mandatory Entry'.
9. Save file in appropriate location.
10. Example Below:

	A	E
1	#TeamLeader	
2	Mandatory Entry	
3	Anasha Floris	
4	Belinda Abrahams	
5	Celesta Jacobs	
6	Kim Adams	
7	Nadia Pinn	
8	Xavier Jordan	
9		
10		

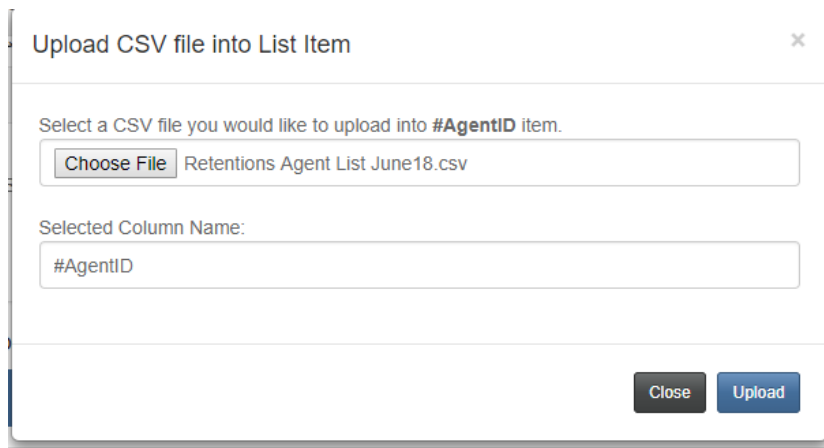
Go back to the Form Wizard on the app.

This section allows editing of Campaign Lists and Question's:

Manage the List for the Call Details Tab			
List Name	Values	Configurations	
#AgentID	Mandatory Entry;Agent1;Agent2;Agent3;Agent4;Agent5;Agent6;Agent7		<div>Update</div> <div>Import CSV</div>
#CallAgentClass	Mandatory Entry;One;Two;Three;Four		<div>Update</div> <div>Import CSV</div>
#Department	Mandatory Entry;Dept1; Dept2		<div>Update</div> <div>Import CSV</div>
#TeamLeader	Mandatory Entry;TM1;TM2		<div>Update</div> <div>Import CSV</div>

Select Import CSV on the list you wish to update.

The following pop-up screen will appear.



Select Choose File

Browse to the correct file to upload and select Upload.

This action will replace any data that may occupy this list.

You will get a validation message.

Upload of CSV file into List item #AgentID has been successful, 46 items were added.

Campaign Form Wizard

Campaign: | Services | AQA

Details of Campaign		Overview Reporting Coaching Feedback List Campaigns	
CampaignID:	4	Remarks:	
Description:	Services AQA	Campaign Status:	Template
Campaign Target:	0	Configuration:	AQA
Daily Target:	0		

The following sections allows you to make changes the the Campaigns List's and Question's:

Manage the List for the Call Details Tab		
List Name	Values	
#AgentID	Mandatory Entry: Abdul Jacobs; Adrian Beukes; Aeysha Davis; Azile Mpetsheni; Beverley Marcus; Bongliwe Nazo; Brynne Majavie; Buhle Mintsila; Bulelwa Tshambula; Cumanani Nako; Gadija Kennedy; Inganathi Mnyasane; Jamie Willemse; Jody Manuel; Jolakazi Mabetswana; Lee James; Lorraine Mooko; Lubabalo Jonas; Mooreeda Isaacs; Mogamat Anwa Adams; Mogamat Thabied Saffodien; Nabeelah Collison; Nandipha Mncono; Nicole Lewis; Ntiefah Sharmar; Nomvuyiseko Loni; Nontlathu Cynthia Arosi; Nosiphiwo Myataza; Ntombobongo Zilwa; Pngumla Qwele; Phathiswa Nojekwa; Raeesa Arnold; Samantha Petersen; Sinazo Mditshwa; Siphokazi Ndlebe; Taariq Abrahams; Tertia Parenzee; Thandeka Guwa; Thembele Mninzi; Tracy-Lee Adams; Vuyokazi Trom; Wasfie Isaacs; Wendy Nzwane; Yollanda Jonas; Zuko Mqolo	Update Import CSV
#TeamLeader	Mandatory Entry:	Update Import CSV

To make individual changes you can select Update to amend the list

The following sections allows you to make changes the the Campaigns List's and Question's:

Manage the List for the Call Details Tab		
List Name	Values	
#AgentID	Mandatory Entry; Abdul Jacobs; Adrian Beukes; Aeysha Davis; Azile Mpetsheni; Beverley Marcus; Bongiwe Nazo; Brynne Majavie; Buhle Mintsila; Bulelwa Tshambula; Cuman Nako; Gadija Kennedy; Inganathi Mnyasane; Jamie Willemse; Jody Manuel; Jolakazi Mabetshwana; Lee James; Lorraine Mooko; Lubabalo Jonas; Moereeda Isaacs; Mogamat Anwa Adams; Mogamat Thabied Saffodien; Nabeelah Collison; Nandipha Mncono; Nicole Lewis; Nielfah Sharmar; Nomvuyiseko Loni; Nontathu Cynthia Arosi; Nosiphiwo Myataza; Ntombobongo Zilwa; Pgumla Qwele; Phathiswa Nojekwa; Raeesa Arnold; Samantha Petersen; Sinazo Mditshwa; Siphokazi Ndebe; Taariq Abrahams; Tertia Parenzee; Thandeka Guwa; Thembela Mninzi; Tracy-Lee Adams; Vuyokazi Trom; Wasfie Isaacs; Wendy Nzwane; Yollanda Jonas; Zuko Mqolo	<div>Update</div> <div>Import CSV</div>

The following pop-up screen will appear, and you can make changes to your list

Amend List Item

Make changes to the following **#AgentID** item:

Mandatory Entry; Abdul Jacobs; Adrian Beukes; Aeysha Davis; Azile Mpetsheni; Beverley Marcus; Bongiwe Nazo; Brynne Majavie; Buhle Mintsila; Bulelwa Tshambula; Cuman Nako; Gadija Kennedy; Inganathi Mnyasane; Jamie Willemse; Jody Manuel; Jolakazi Mabetshwana; Lee James; Lorraine Mooko; Lubabalo Jonas; Moereeda Isaacs; Mogamat Anwa Adams; Mogamat Thabied Saffodien; Nabeelah Collison; Nandipha Mncono; Nicole Lewis; Nielfah Sharmar; Nomvuyiseko Loni; Nontathu Cynthia Arosi; Nosiphiwo Myataza; Ntombobongo Zilwa; Pgumla Qwele; Phathiswa Nojekwa; Raeesa Arnold; Samantha Petersen; Sinazo Mditshwa; Siphokazi Ndebe; Taariq Abrahams; Tertia Parenzee; Thandeka Guwa; Thembela Mninzi; Tracy-Lee Adams; Vuyokazi Trom; Wasfie Isaacs; Wendy Nzwane; Yollanda Jonas; Zuko Mqolo

Close

Save

Select Save once complete with this option.

NOTE: These entry boxes will only accommodate 8000 characters.

If your list grows to beyond this limitation, please contact

appsupport@geniianalytics.com