Title: **Daily Campaign Creation**

Priority: **Medium**

Estimate: **TBD**

As a **Hardship / Collections Agent**

I want **campaigns to be automatically created in Salesforce on a daily basis**

So that I can **eliminate manual effort of creating campaigns monthly and enable near real-time updates for Simply Energy outbound campaigns**

**Acceptance Criteria**

**AC1:**

**Given** an Outbound campaign needs to be automatically

**When** the auto creation of Hardship and Collections campaigns gets triggered at **1am** in Salesforce daily

**Then** the campaign in SF should automatically synchronize to Genesys Cloud with the correct naming convention, campaign schedule and settings

**Design notes**:

1. Batch job will be created in Salesforce to trigger campaign creation at 1AM Australian time.
2. Job will create campaign for the day, with the proper naming convention, campaign schedule and settings.
   * + - Date Format: DD-MM-YYYY
       - Campaign Naming Convention:
   * Missed Payments (Non-WA) - DD-MM-YYYY
   * Missed Payments (WA) - DD-MM-YYYY
   * New Hardship Referral (Non-WA) - DD-MM-YYYY
   * New Hardship Referral (WA) - DD-MM-YYYY
   * Review Hardship Referral (Non-WA) - DD-MM-YYYY
   * Review Hardship Referral (WA) - DD-MM-YYYY
   * Practical Assistance (VIC) - DD-MM-YYYY
   * NVIC Res - Dialer 1 - DD-MM-YYYY
   * NVIC Res - Dialer 2 - DD-MM-YYYY
   * NWA NonDiscon - Dialer 3 - DD-MM-YYYY
   * VIC & NVIC SME - Dialer 1 - DD-MM-YYYY
   * VIC & NVIC SME - Dialer 2 - DD-MM-YYYY
   * VIC Res - Dialer 1 - DD-MM-YYYY
   * VIC Res - Dialer 2 - DD-MM-YYYY
   * WA NonDiscon - Dialer 3 - DD-MM-YYYY
   * WA Res & WA SME - Dialer 1 - DD-MM-YYYY
   * WA Res & WA SME - Dialer 2 - DD-MM-YYYY

* ***\*\*\* Note, if creating in test environment, need to add suffix of MSSAT or Preprod in Campaign Naming Convention. Example: Missed Payments (Non-WA) - DD-MM-YYYY – MSSAT***
* Campaign Schedule – based on the Campaign ID of the Campaign Schedule in Salesforce

For **Hardship Campaign Schedule**:



For **Collections Campaign Schedule:**



* Campaign Setting - based on the Campaign ID of the Campaign Schedule in Salesforce



* **Fields needed to be filled out for campaign creation:**For **Hardship Campaigns**:
* RecordTypeId
* Campaign\_Job\_\_c
* Name
* Domain\_\_c
* State\_\_c
* Type
* StartDate
* EndDate
* LaunchDate\_\_c
* purecloud\_\_PureCloud\_Campaign\_Schedule\_\_c
* purecloud\_\_PureCloud\_Campaign\_Setting\_\_c
* Campaign Owner: [**Genesys Integration**](javascript:void(0);)
* Status: Planning ( this will automatically change to Monitoring once the campaign started to dial if it has contacts)





For **Collection Campaigns**: - ***Weekdays schedule***

* RecordTypeId
* Campaign\_Job\_\_c
* Name
* Domain\_\_c
* State\_\_c
* Type(Campaign\_Type\_\_c ?)
* Event\_Type\_\_c
* StartDate = Current Date
* EndDate
* LaunchDate\_\_c
* purecloud\_\_PureCloud\_Campaign\_Schedule\_\_c
* purecloud\_\_PureCloud\_Campaign\_Setting\_\_c
* Campaign Owner: [**Genesys Integration**](javascript:void(0);)
* Status: Planning (this will automatically change to Monitoring once the campaign started to dial if it has contacts)





For **Collections Campaign: - *Weekend Schedule Saturday***





1. Campaign should synch with Genesys along with contact list with same name.

**\*\*\*The batch job that will be created needs to be tested with the existing setup of contact creation and campaign reconciliation, details for each below:**

**AC2: Contact creation once the campaign is created and contact sync with Genesys**

**Given** a contact needs to be added as campaign member

**When** the batch job runs daily(Hardship 8am) ) and hourly(Collections)

**Then** the campaign members added in SF should automatically synchronize to Genesys Cloud

**Design notes**:

Each Campaign Member is created with the details from the Hardship Program and Collections Campaign.

For **Collection Campaign Member**:

* There is a batch job that runs hourly – hourly batch that will pick up the scheduled dialer event records and add their related contacts to the appropriate Collections campaign (as campaign members
* Batch job will fetch the following:
  + Collection Event where Status\_\_c = Scheduled and Planned\_Date\_\_c <= TODAY
  + Campaign where Domain\_\_c = ‘Collections’ and StartDate = TODAY
  + Contacts from the Accounts connected the fetched Collection Events

For **Hardship Campaign Member**:

* There is a scheduled flow that runs daily by 8am.
* The flow will fetch the following:
  + Campaign where StartDate = CurrentDate and EndDate = CurrentDate and LaunchDate\_\_c = CurrentDate and RecordType = Outbound Campaign and Campaign\_Job\_\_c not equal to NULL and Domain\_\_c = ‘Hardship’.
  + Hardship Program with the condition from the Campaign Job associated to the above campaign.

**AC3: Genesys Campaign Reconciliation**

**Given** Genesys campaigns need to reconcile campaign data and campaign members with Salesforce

**When** Genesys ends the campaign in Salesforce at 11:59PM

**Then** the campaign reconciliation will start 1 hour after 12:00AM as set in the Genesys managed package reconciliation setting.

**Design notes**:

1. Genesys Cloud ends a campaign in Salesforce at 11:59 PM on the day of the scheduled campaign based on the time zone associated with the campaign. (If no time zone is associated with the campaign, the campaign ends at 11:59 PM on the day of the scheduled campaign based on the time zone of your Salesforce organization.)
2. After the Campaign Reconciliation Period ends, Genesys Cloud reconciles data and updates the campaign and campaign member records in Salesforce.

Genesys Cloud updates campaign member records with the following information:

* **Reconciled Result:** This selection indicates that at the end of the campaign, Genesys Cloud reconciled the campaign member data in Salesforce.
* **Last Attempt:** This field lists the date and time when an agent last attempted to reach this person during the campaign.
* **Last Result:** This field lists the wrap-up code name used for the interaction during the campaign. If the integration dialed more than one phone number, this field lists the results of the last attempt to contact the campaign member.