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Genesys Engage cloud Administrator's Guide

Exporting

Exporting

The screenshot shows the 'Campaign Preview' interface. At the top, there are navigation links: Campaign Hierarchy (1) | Open Activities (0) | Activity History (0) | Attachments (0) | Opportunities (0) | Campaign Members. Below these is the 'Campaign Detail' section. On the right side of this section is an action bar with buttons: Edit, Delete, Clone, Manage Members (dropdown), Advanced Setup, **Export to Engage** (circled), and Invoice TF (ContactBatch). The main area contains a table of campaign details:

| | | |
|-----------------------|-------------------------------------|-------------------------------|
| Campaign Owner | Agent1 Engage [Change] | Total Leads |
| Campaign Name | Preview [View Hierarchy] | Converted Leads |
| Active | <input checked="" type="checkbox"/> | Total Contacts |
| Type | Conference | Total Responses |
| Status | Planned | Num Total Opportunities |
| Start Date | 4/19/2016 | Num Won Opportunities |
| End Date | 4/12/2017 | Total Value Opportunities |
| Expected Revenue | | Total Value Won Opportunities |
| Budgeted Cost | | |
| Actual Cost | | |
| Expected Response (%) | 0.00% | |
| Num Sent | 0 | |
| Parent Campaign | | |

Below the table is the 'Engage Integration' section, which includes 'Engage List Type' (Trickle Feed) and 'Engage Internal ID'.

Now that you have your Engage SFDC Adapter for Outbound installed and configured, exporting your campaign information is easily done by clicking on the **Export to Engage** button from the campaign details view. Within moments you should have a message appear indicating that your export was successful. To verify that all details have been exported, simply log in to your Outbound account and check for the campaign name under your **Lists** tab.

Scheduling campaign exports

The screenshot shows the Salesforce 'Apex Classes' page. On the left, the 'Setup' menu is visible, with 'Apex Classes' highlighted under the 'Develop' section. In the main content area, a table lists various Apex classes. The 'Schedule Apex' button is circled in the top right of the table. An arrow points from this button to the 'Schedule Apex' configuration window that opens on the right. The window contains the following fields and options:

- Job Name:** A text input field.
- Apex Class:** A lookup field with a magnifying glass icon.
- Schedule Apex Execution:** A section with the following options:
 - Frequency:** Radio buttons for 'Weekly' (selected) and 'Monthly'.
 - Recurs every week on:** A list of days with checkboxes: Sunday, Monday, Tuesday, Wednesday, Thursday (checked), Friday, Saturday.
 - Start:** A date field set to 5/19/2016.
 - End:** A date field set to 6/19/2016.
 - Preferred Start Time:** A dropdown menu set to 'None'.

At the bottom of the window are 'Save' and 'Cancel' buttons.

You can use the adapter to schedule an export. Use the **Apex Classes** found under the **Develop** section in the **Setup** menu. Once you click on the **Schedule Apex** button from the menu, another window opens asking you for the following information:

- 1- Job Name:** this is a name you choose for your job
 - 2- Apex Class:** click on the Apex Class Lookup icon and choose **engageScheduledCampaignSync**
 - 3- Schedule Apex Execution:** these settings are up to you
- Once you've completed all the sections, click the **Save** button at the bottom of the page and your export is now scheduled.