

## Creating and Generating a Voice Campaign

<https://campus.barracuda.com/doc/78155999/>

Contact your Barracuda PhishLine Support Representative to obtain a phone number to use in your Voice campaign.

### Create the Basic Voice Campaign

1. Navigate to **Campaigns > Campaign Manager**.
2. Click **New**.
3. For the **Campaign Type**, select **Voice Campaign**. The **Campaign Type** for a specific campaign cannot be changed later.
4. Enter the following information. These values can be changed at any time.
  - **Campaign Name** – Enter a descriptive name for the campaign.
  - **Description** – Optional. Enter text to describe the campaign.
  - **Enable Content Groups** – Optional. This is an advanced setting, enabling you to use [Content Groups](#).
  - **Plan** – Optional. Select a plan associated with this campaign. Create and review plans under **Plan > Plan Manager**.
  - **Campaign Intent** – Select a reason why you are conducting this campaign.


The system will recalculate Program Term data any time you change the Campaign Intent value. The recalculation time depends on the number of outbound records affected.

    - **Testing** – Most common selection. For a standard phishing campaign, this intent tracks and records results, like click count and message count, in the Program Term data.
    - **Testing (Excluded from Program Statistics)** – For a standard phishing campaign, but does not record the results in the Program Term data.
    - **Education Campaign** – For a campaign designed purely to train users, not to track whether users take any action, like clicking.
    - **Risk Based Surveys** – For a campaign designed solely to collect users' input on a survey.
    - **Announcements** – For a campaign designed solely to push out information, like sending the Click Thinking Newsletter, and not to track user actions.
    - **Immediate Feedback Automated Campaign\*** – A campaign that automatically sends an email a user, based on a specified action in another campaign. For example, a user who clicks on a link in another campaign will automatically receive an email inviting them to take a training.
    - **On-Demand Automated Campaign\*** – Enable the campaign Administrator to send a follow-up email to a manager or employee, based on a specific action in a campaign. For example, you can send an email to a manager letting them know which of their employees clicked a link in a campaign.

- \* Requires assistance from Barracuda PhishLine Support, due to use of Dynamic Address Books.
  - **Category** - Optional. Enter a category, like **Phone Simulation**, to associate with this campaign for tracking purposes.
5. Click **Save**. The page refreshes. At the top of the page, you can edit the information you entered in Step 4.
  6. **Lifecycle Status** displays **Upcoming**. This is a new campaign and has not yet been activated.

### Set the Schedule

In the **Scheduling** section, specify the following information:


- **Schedule Based Upon** - Select the time zone for which you want to base the campaign schedule.
  - **Administrator's Time Zone** - Use the time zone you set in **My Preferences** under the profile icon .
  - **Target's Time Zone** - Use the time zone for the target's location, as specified in the Address Book.
- **Start Date** - Select a date and time on which to start the campaign.
- **End Date** - Select a date and time on which to end the campaign. Late messages (messages sent out after their scheduled time) can be sent up until the Cutoff Date.
- **Cutoff Date** - Select a date and time when results will no longer be collected for reporting. To ensure that you receive all of the results reporting, specify the Cutoff Date to be *after* the End Date. Having time between the End Date and Cutoff Date provides a cushion to account for factors that might delay a target's interacting with an email, like weekends and vacations.
- **Days of the Week** - Select one or more days of the week on which to send campaign emails.
- **Hour of Day "From", Hour of Day "Through"** - Select a time range during which you want to send campaign messages.

### Specify Targets

Note: Be sure that contacts in your Address Book have phone numbers that can receive incoming calls.

In the **Targets** section, specify the following information:

- **Emails to Send** - Enter the number of phone numbers you want to call in this campaign. The actual number of calls will not exceed the number of matching Address Book entries - in other words, each phone number receives no more than one call from each campaign. If you specify fewer phone numbers than the number of phone numbers, the system will randomly select phone numbers to receive the calls.  
Example: There are 50 matching email address entries. If you specify 50 emails to send, each address will receive an email. If you specify 20 emails to send, 20 of the email addresses will be randomly selected to receive the email.

- **Set to X Matching Email Address Entries** – Click this shortcut button to set the **Emails to Send** based on the number of matching phone number entries from your selected Address Books with Advanced Filters applied.
- **Select Address Books** – Select one or more Address Books to include in the campaign. Click the target  icon to view the number of entries of an Address Book and to edit it.
- **Create New Address Books** – Click to create a new Address Book. For details, refer to [How to Create an Address Book](#).
- **Show Advanced Filters** – Click to display optional hidden filters. Advanced filters are used to determine which addresses in an Address Book to use as targets for the campaign. These same fields are also present in Address Books. Entering information in these fields in the campaign filters Address Book entries based on these criteria. So you can decide to send only to employees of a certain company, at a certain site, and at a certain organization level – like sending email only to Barracuda Networks employees at the Campbell, California office who are at the Director level.

Note that Advanced Filter fields do not support Boolean search terms.

- **Organization Area** – Part of the organization, like department or division, corresponding to the Address Book entry.
- **Organization Level** – Title or management level corresponding to the email address entry.
- **Organization Tenure** – How long the person has been with the organization. Can be a numerical or alphabetical entry.
- **Company** – Name of the organization corresponding to the Address Book entry.
- **Country** – Geographic country corresponding to the Address Book entry.
- **Region** – Geographic region where the address is located, like **EMEA** or **Northeast**.
- **Site/Location** – Descriptor for the location of the address, like **Manufacturing** or **Downtown Branch**.
- **State** – Geographic state corresponding to the address entry.
- **Source** – The source of the address. This field can be an Open Source Intelligence source or perhaps data from human resources or a response from a certain marketing campaign.
- **Program Term Group** – Automatically displays user level for contact selection.
- **Employment Type** – Descriptions of employment, like **Exempt, Non-Exempt, Seasonal, Temporary**, and so on.
- **Cost Center** – Unit within the organization where costs related to the email address entry are charged.
- **Custom Fields** – Enter any information you know to be in one of the custom fields in an Address Book.

### Specify the Content

Select one or more Content Groups to use in this campaign.

Refer to [Content Groups](#) for more information.

Continue with **Specify Approval Comments** below.

1. In the **Content** section, click **Add New Email Template**. In the dialog box, click **Yes** to save the current campaign and add the email template. The Content Center displays available email templates.
2. In the left navigation pane, search for **Name = Voice Application Placeholder**. Click **Apply** to view the placeholder template in the Content Center. .
3. Click the **Voice Application Placeholder** template.
4. Click **Add to My Recent Campaign**.
5. When prompted, select **Return to Content Center**.
6. In the left navigation panel, for the **Type** filter, deselect **Email Template** and select **Landing Page Template**. Leave the **Name = Voice Application Placeholder** as it is.
7. Click the **Voice Application Placeholder** template.
8. Click **Add to My Recent Campaign**.
9. When prompted, select **Back to My Recent Campaign**.
10. Back in the **Content** section of your campaign, click **Add New Email Account for Sending**. Here, you will select the phone number you obtained from your Barracuda PhishLine consultant for this Voice campaign.
  - To optionally specify additional phone numbers, click **Save** now. Add another phone number and repeat for each additional number. Then, continue the rest of the process below. If you add multiple phone numbers here, Barracuda PhishLine will randomly assign a sender phone numbers to each contact phone number selected when you generate the campaign.
11. **Email Account Name** - This prompt does not apply to Voice campaigns.
12. For the **Email Server Domain**, select the phone number you received from your Barracuda PhishLine consultant.
13. Click **Add New Web Server for Landing Pages**. Select the placeholder that your Barracuda PhishLine consultant created for you.

### Specify Approval Comments

If the **Approval Required** box is selected, this campaign must be approved before you can Go Live with the campaign. If you choose, you can enter comments to the reviewer in the **Approval Comments** box.

The **Approval Required** setting is configured in **Global Settings > Approvals > Campaign Approvals Required**. If approvals are required, you cannot move the campaign forward from **Approve** to **Go Live** mode without the proper approval. This setting does not affect your ability to move the campaign between **Design**, **Generate**, and **Approve** modes.

### Specify Advanced Settings

1. Optional. Select the **Hide Campaign Results** box to hide the results from view. The results will still be collected. You might choose to use this setting when a campaign is past its cutoff date,

so only current campaigns display in the results.

2. Optional. Select an image to associate with this campaign. Click **Browse** to select the image.

### Save the Campaign

When you have completed all of the required actions above, click **Save** to save the campaign. The page refreshes.

### Generate the Campaign

Under **General Settings**, in the **Stage** area, click **Generate** . Click **Yes** when prompted. The campaign generates.

The generation process can take several minutes. You can move away from the screen or even log out without interrupting the generation process.

## Figures

1. profileIcon.png
2. targetIcon.png
3. 2.generate.png

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